I. My Delegate

A. Someone authorized to have access to your Chrome River account

1. This individual can create and submit expense reports on your behalf.
2. They can also access your user settings menu, home screen and Inquiry Reports.
3. This delegate will receive copies of any email notifications regarding returned or adjusted reports that were created for you.
4. Delegates are NOT able to approve expenses that are routed to you.

B. To authorize a user to be a Delegate for you:

1. Click the User Icon with your name in the top right hand corner.
2. Select Settings and then Delegate Settings.
3. Under My Delegates select Add New Delegates.
   a) Start typing the user's name in the box, then select the user from the list below. This individual is now a Delegate for you.
   b) You may choose to have more than one Delegate, to add another, simply repeat the previous steps of typing and selecting another individual's name.
4. All authorized Delegates will be listed. Now that user will be able to select you from his or her own delegation list and create/submit expense reports on your behalf.

C. When you want to stop allowing someone to work as a Delegate for you, click the X next to their name.

II. As a My Delegate

A. When you tap the User Icon in the upper right hand corner, you will see the names of users that have authorized you to work as their delegate.

B. To the right of each user’s name, you will see the total number of their unused expense transactions and unsubmitted reports.

C. Select the desired user name to work as a delegate for that person.

1. You will now see his or her name in the upper right corner, with a double user icon to indicate that you are working as a delegate.
2. To switch back to your own account, simply tap the icon again and then select your name from the list.

D. If you are a Delegate, always be aware of the name showing in the User Icon. That is the employee account that you are in.

III. Approval Delegate

A. If you are a Supervisor or Financial Manager, you can set up an Approval Delegate.

1. This individual can **Temporarily Approve** expenses and pre-approvals on your behalf (for example, when you go on vacation).
2. You can only have 1 individual approving for you at a time.
3. An Approval Delegate will have a date range that they are allowed to approve on your behalf.
4. An Approval Delegate does **NOT** have access to your Chrome River account; they are **NOT** able to create or submit expenses for you.

B. To authorize a user to be an Approval Delegate for you:

1. Click the User Icon with your name in the top right hand corner.
2. Select Settings and then Delegate Settings.
3. Under My Approval Delegate select Add Approval Delegate.
   a) Start typing the user's name in the box, then select the user from the list below.
   b) Set the Start and End dates for the temporary authorization.
4. The delegate's name will appear with the range of dates during which he or she may approve expenses on your behalf.
   a) Chrome River will send an email to the approval delegate describing the routing changes that will occur during this period.
   b) All expenses and/or pre-approvals assigned to you during that time period will automatically queue up for the approval delegate to approve.
   c) The approval delegate will receive the Approval emails.
5. An existing Approval Delegate can be edited or removed at any time during the specified time frame.
6. At the end of the timeframe you specified, the system will automatically de-authorize your approval delegate, and the approval process will return to default status.
   a) However, all reports and pre-approvals that were routed during that timeframe will remain in the approval delegate's approval queue for further action.