



Chrome River User Manual

DELEGATE INFORMATION

Delegates can create expense reports for another user and access his or her Settings menu, Home screen, and Inquiry Reports. As a delegate, you will receive copies of any e-mail notifications regarding rejection or adjustment of reports created for the user. However, you will not be able to approve expenses that are routed to the user.

When other users have authorized you to work as their delegate, you will see their names under your name when you tap it in the upper right hand corner. To the right of each user's name you will see the total number of their unused expense transactions and the total number of their unsubmitted reports. You will not see these totals next to your own user name.

The screenshot shows a mobile application interface for a user named Wu Shock. At the top, there is a navigation bar with a '+ New' button and a user profile icon labeled 'Wu Shock'. Below this, the user's name 'Wu Shock' and 'Last login: 07/04/2019 at 12:32 PM' are displayed. A 'SELECT USER' section follows, listing three users: Emily Geer, Kristie Courtney, and Sonya Emmart. To the right of each user's name are two columns of numbers. A yellow callout points to the 'SELECT USER' section, stating: 'This section lists users you are a delegate for.' A red callout points to the first column of numbers, stating: 'This section represents the number of unused expense transactions for the specified user.' A blue callout points to the second column of numbers, stating: 'This section represents the number of unsubmitted reports, including draft and returned reports, for the specified user.' Below the user list is a menu with options: Print New Invoice Cover, Settings, System Administration, Help, and Logout.

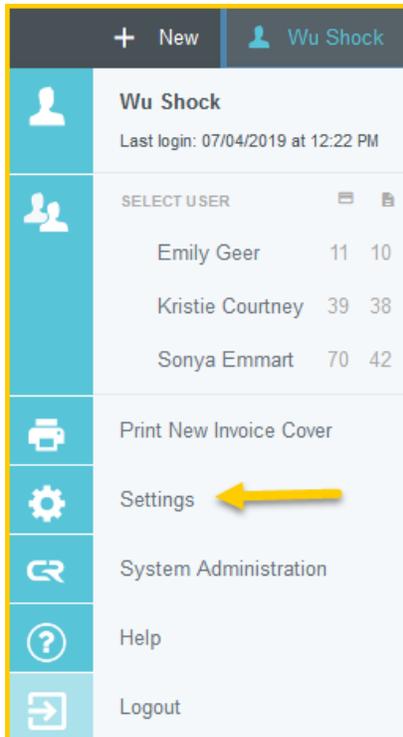
User	Unused Expense Transactions	Unsubmitted Reports
Emily Geer	11	10
Kristie Courtney	39	38
Sonya Emmart	70	42



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Add a Delegate

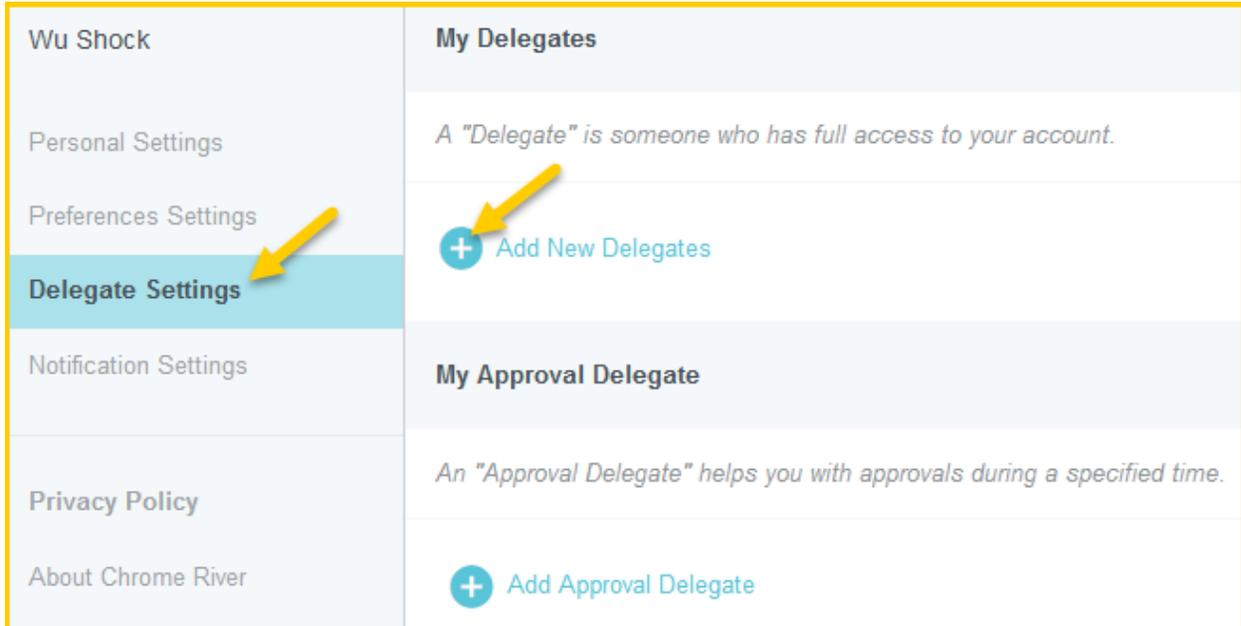
To add a user who is allowed to work as your delegate, tap your name in the upper right corner, then tap SETTINGS.



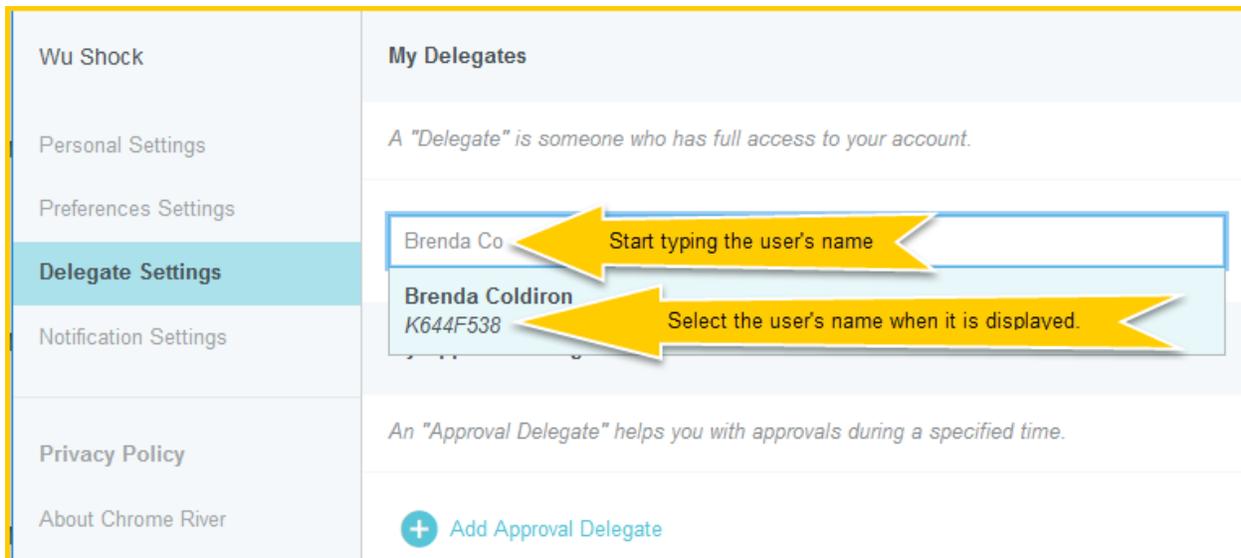


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Tap **Delegate Settings**, then tap **Add New Delegates**.



Drag the slider to scroll through the list of potential delegates or start entering the user's name to jump down the list.





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My Delegates

A "Delegate" is someone who has full access to your account.

 **Brenda Coldiron**
K644F538

 [Add New Delegates](#)

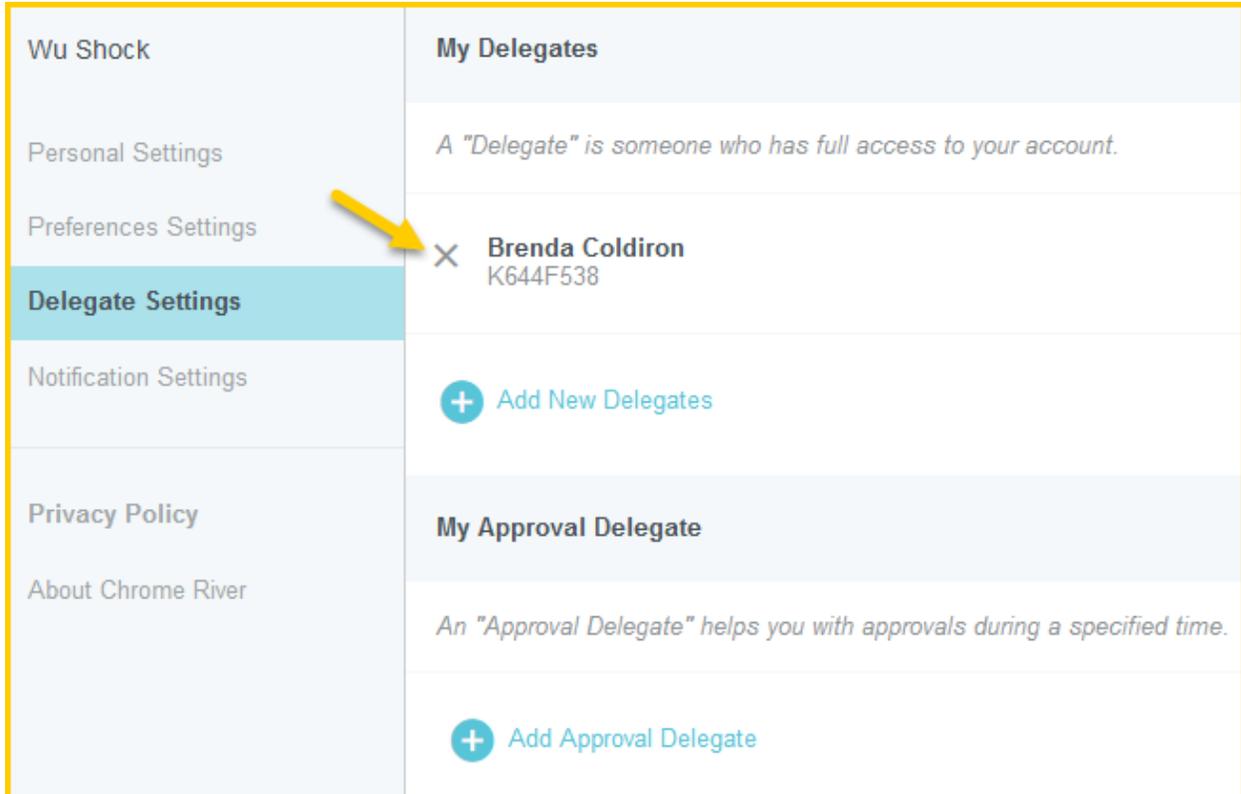
Now that user will be able to select you from his or her own delegation list and create expenses on your behalf.



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Remove a Delegate

To revoke a user's ability to act as your delegate, tap the X next to his or her name in the **My Delegates** list.

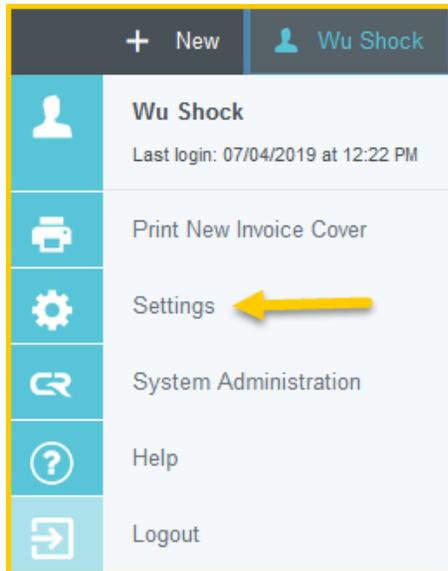




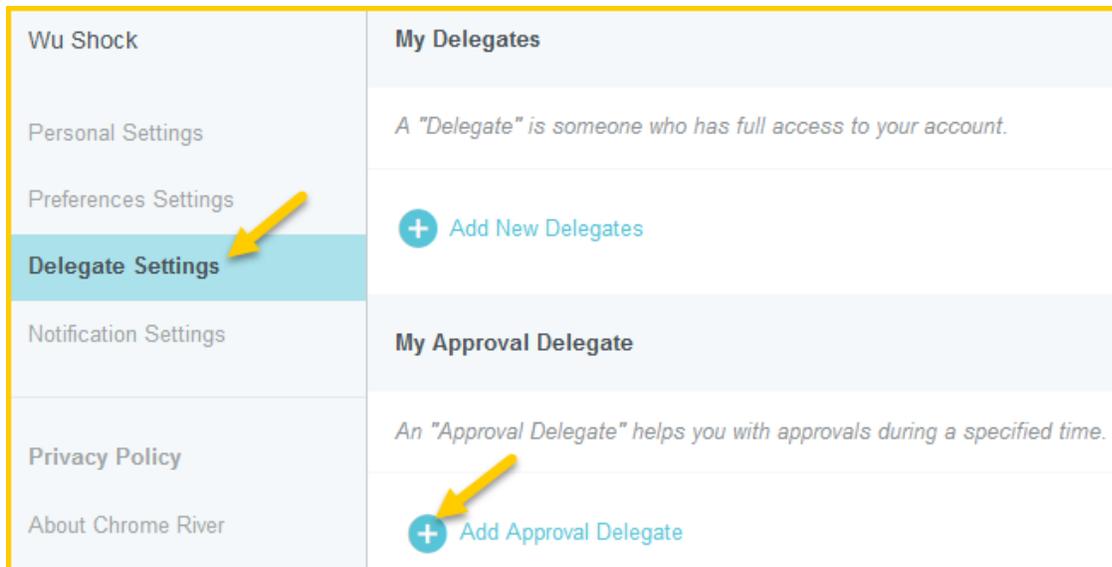
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Approval Delegation

If you need to have another user temporarily approve expenses on your behalf, such while you are on vacation, tap your name in the upper right corner, then tap **Settings**.



In **Delegate Settings**, under **My Approval Delegate**, tap **+Add Approval Delegate**.





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You will be able to choose the approval delegate from a searchable list and set the Start and End dates for the authorization to approve expenses on your behalf.

My Approval Delegate

An "Approval Delegate" helps you with approvals during a specified time.

Select a User

Start Date

End Date

The delegate's name will appear with the range of dates during which he or she may approve expenses on your behalf.

My Approval Delegate

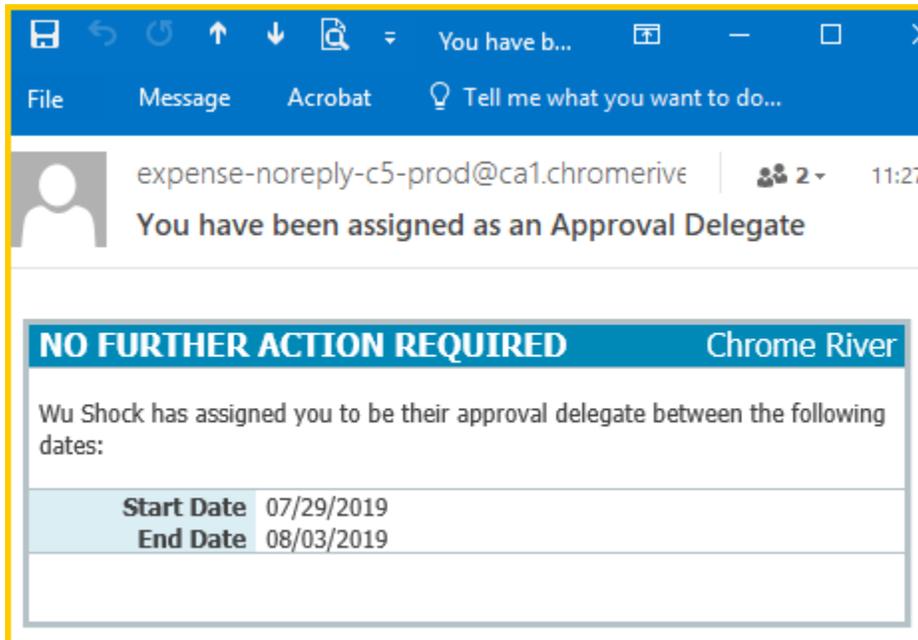
An "Approval Delegate" helps you with approvals during a specified time.

Kristie Courtney(07/29/2019-08/03/2019)
E254M254



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Chrome River will send an email to the approval delegate describing the routing changes that will occur during this period. All expenses, pre-approvals and/or invoices assigned to you will automatically queue up for the delegate to approve. Regular approval emails will also be sent to the delegate.





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Remove Approval Delegate

At the end of the period you specified, the system will automatically deauthorize your approval delegate, and the approval process will return to default status. However, all reports and pre-approvals that were routed during that period remain in the approval delegate's approval queue for further action. If you return earlier than expected or simply wish to revoke your approval delegate's access, tap the **X** next to his or her name.

My Approval Delegate

An "Approval Delegate" helps you with approvals during a specified time.

	Kristie Courtney (07/29/2019-08/03/2019) E254M254	
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 [Add Approval Delegate](#)