

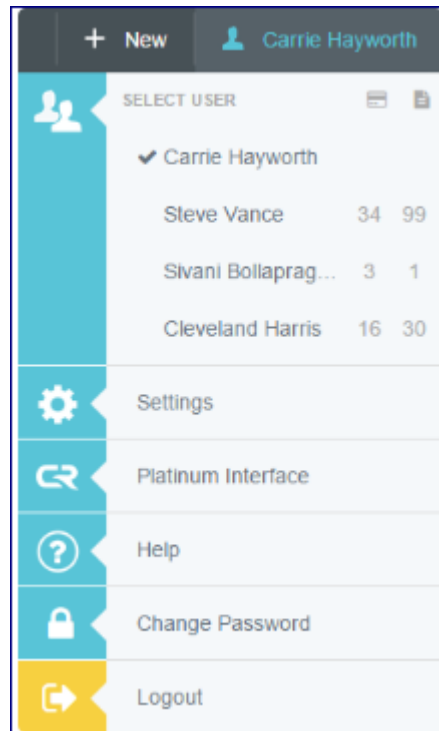
Types of Delegates

Chrome River offers three types of delegation to allow users to create and approve expense reports for each other.

- **Delegate:** Create expense reports for another user and access his or her Settings menu, Home screen and Inquiry Reports. You will receive copies of any e-mail notifications regarding approval, rejection or adjustment of reports created for the user. However, you will not be able to approve expenses that are routed to the user.
- **Super Delegate:** Same privileges as above, but you may work as a delegate for any user in the company without needing to be authorized as a delegate by each user.
- **Approval Delegate:** Temporarily approve expenses for another user—for example, when he or she is on vacation—via email. You will not be able to access the user's Approval screen.

Delegate

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.



Unused expense transactions, including credit cards, email memos, cash advances, travel data and approved pre-approvals

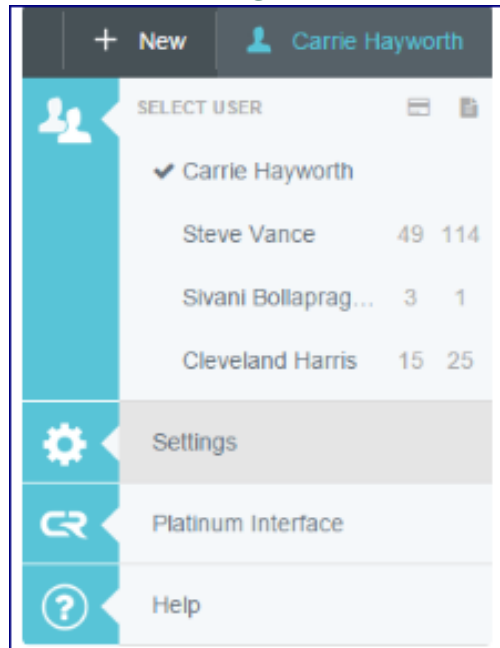


Unsubmitted reports, including draft and returned reports

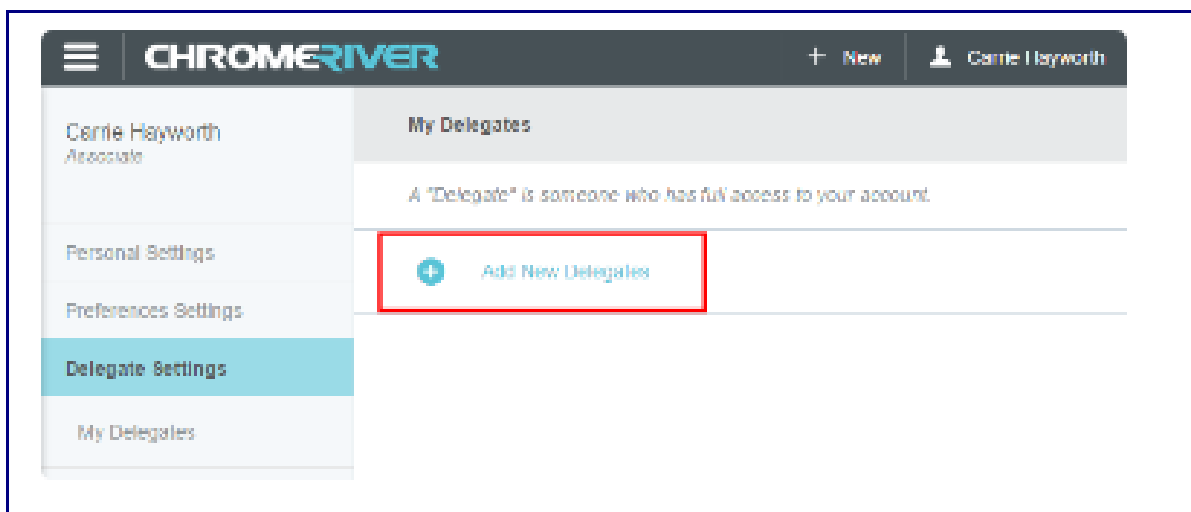
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Authorize a User to Work for you

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

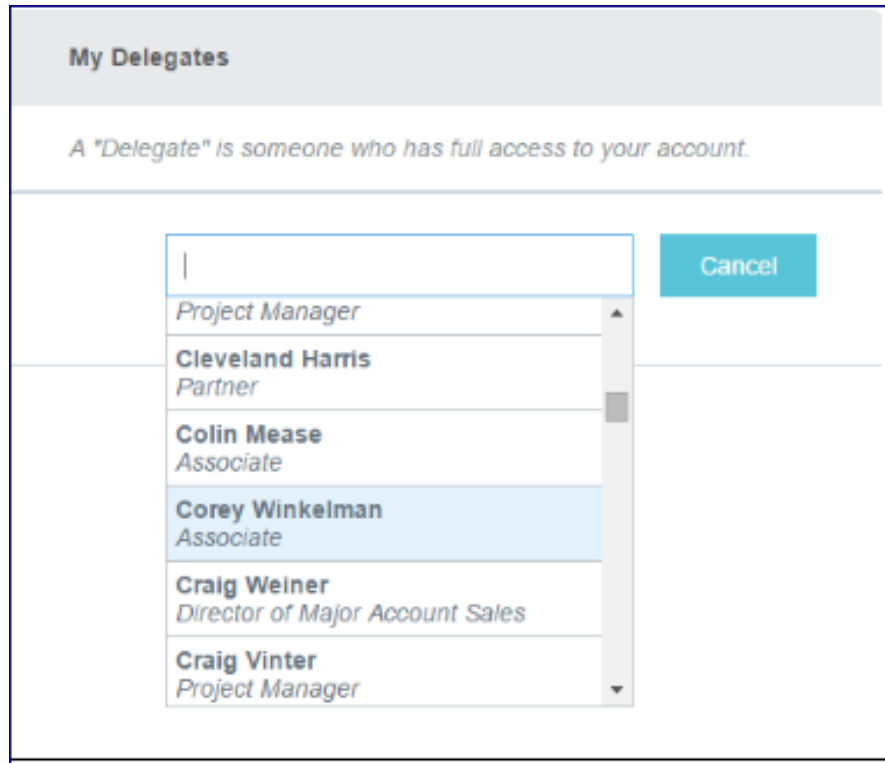


Tap **DELEGATE SETTINGS**, then tap **ADD NEW DELEGATES**.



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

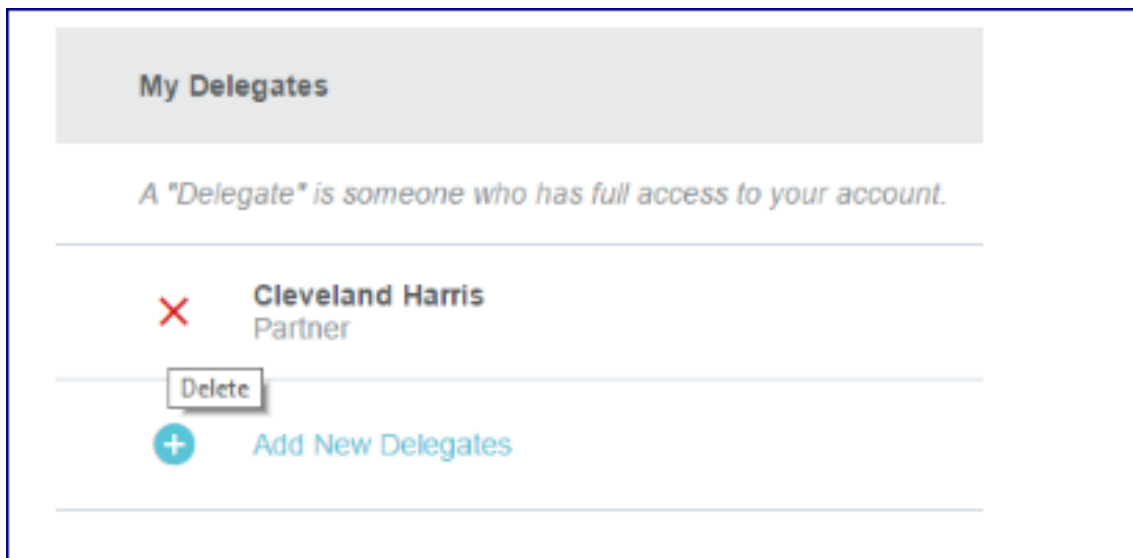


Now that user will be able to select you from his or her own delegation list and create expenses on your.

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Remove a Delegate

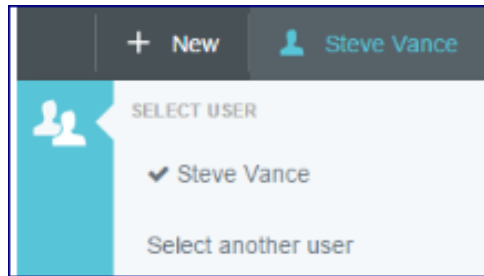
To revoke a user's ability to act as your delegate, tap the X next to his or her name in the My Delegates list..



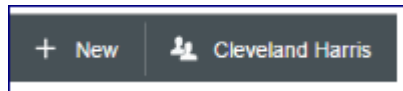
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Super Delegates

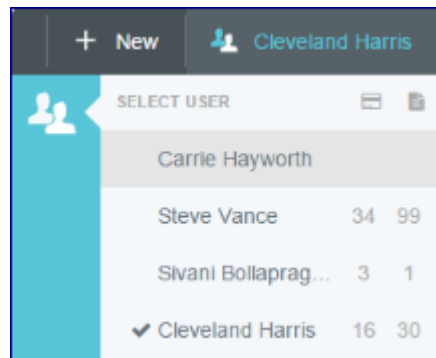
1. If you are a super delegate, you will instead see the **SELECT ANOTHER USER** link, which allows you to scroll and search through a list of all users in the organization.



2. Tap on the desired user name to work as a delegate for that person. You will now see his or her name in the upper right corner of the app, with a double user icon to indicate that you are working as a delegate.



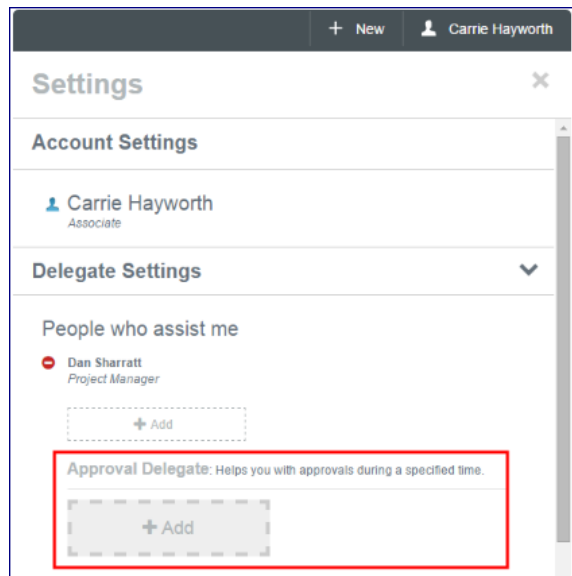
3. To switch back to your own account, simply tap the icon again and then select yourself from the list.



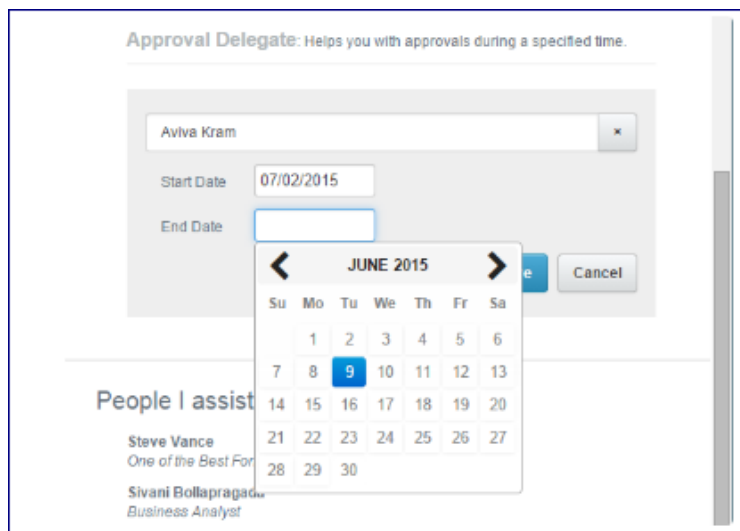
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Approval Delegate

If you need to have another user temporarily approve expenses on your behalf, tap your name in the upper right corner, then tap **SETTINGS**. In Delegate Settings, under Approval Delegate, tap **+ADD**.



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.



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Approval Delegate

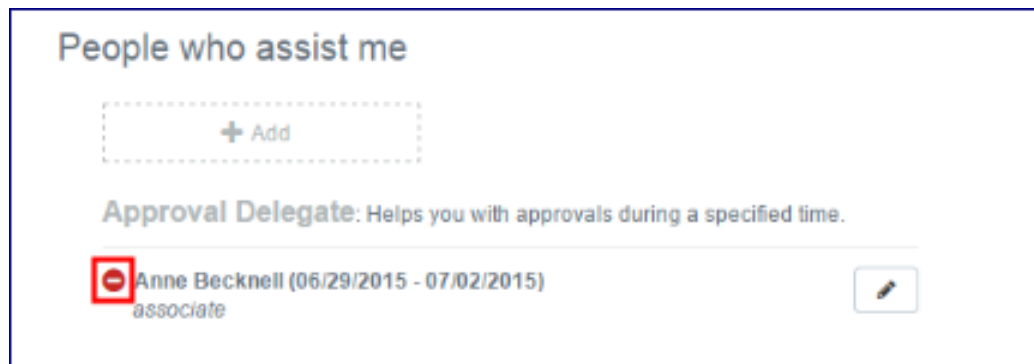
The delegate's name will appear with the range of dates during which he or she may approve expenses on your behalf. You may only have one approval delegate working for you at a time.

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

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 red circle next to his or her name.



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