Managing Delegates

Chrome River offers delegation to allow users to create expense reports for another user or can approve with appropriate authority. There are three types of delegates:

Delegate: Can create pre-approvals and expense reports on behalf of faculty/staff. The faculty/staff member must designate someone as their delegate in their **Settings profile**. Delegates can view the person's Settings menu and run Inquiry Reports. Delegates will receive copies of any e-mail notifications regarding rejection or adjustment of reports created for the user. Delegates **do not** have any approval authority. Any faculty/staff member can be designated as someone's delegate.

Super Delegate: Can create pre-approvals and expense reports on behalf of all faculty/staff and have full system reporting capabilities. All financial managers and designees will be assigned this role systematically.

Approval Delegate: Financial Manager can temporarily assign another financial manager or designee authority to approve expenses or pre-approvals on their behalf. Financial Managers can assign an Approval Delegate in their **Settings profile** and must designate a specified time period. Approval delegated would be assigned in the event you will be unavailable e.g., vacation, illness, sabbatical. You **will not** be able to access the user's Approval screen but will be notified via email. Approval Delegates will be required to approve pre-approvals those they are acting as an approval delegate.

If the person you select is currently assigned as someone's approval delegate, they cannot be assigned.

Delegate Role

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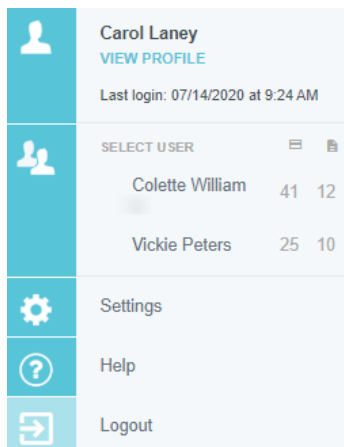
To the right of each user's name, you will see the total number of their unused expense transactions and the total number of their unsubmitted reports. You will not see these totals next to your own username.

A "Departed" label next to a username indicates that the user has left the university but still has outstanding tasks that must be completed by their delegates. Contact Shared Services Center.
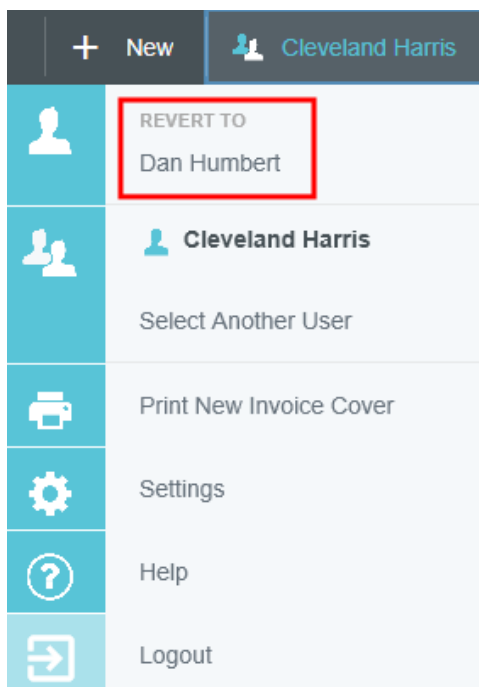
Super Delegate

If 'Super Delegate' role has been systematically added to your profile due to being a financial manager or designee, 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.
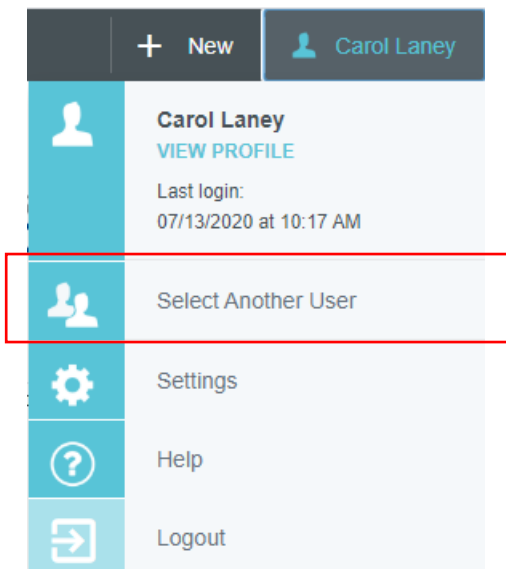
Tap on the desired employee name to work as a delegate for that person. You will now see his or her name in the upper right corner of the app in place of your name, with a double user icon to indicate that you are working as a delegate.
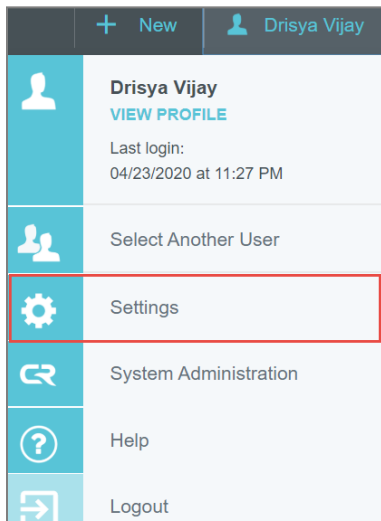
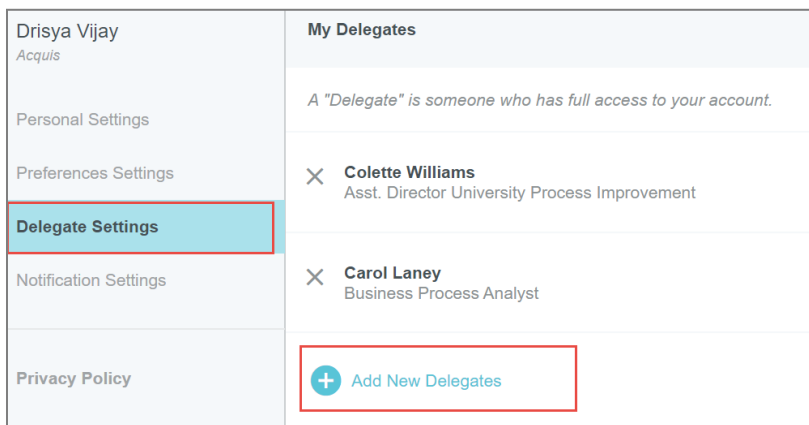To switch back to your own account, simply tap the name icon again and then tap **REVERT TO** [your name].

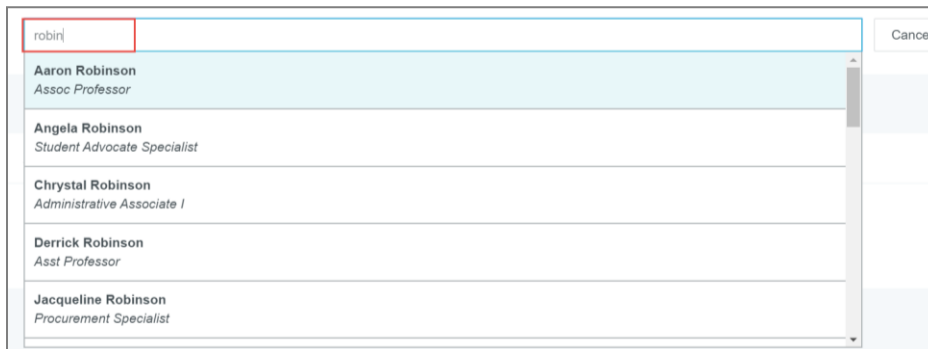## Add a Delegate to your Settings

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

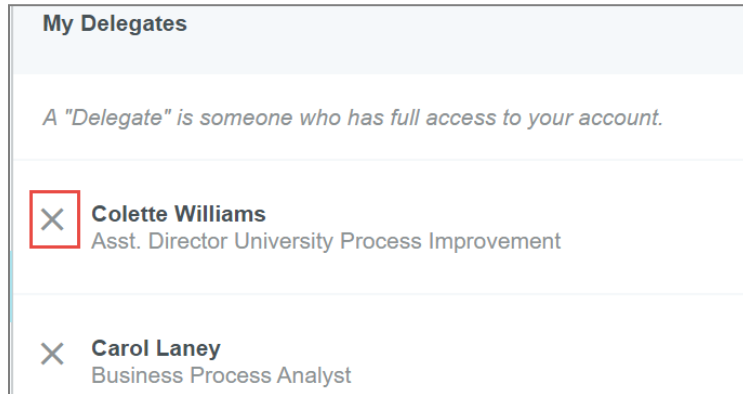Tap **Delegate Settings**, then tap **Add New Delegates**.

Scroll through the list of faculty/staff or start entering the user's name to narrow the search.

The user will be able to select you from the delegation list and create expenses on your behalf.

Remove a Delegate

To revoke a user's ability to act as your delegate, tap the X next to the user's name in the My Delegates list. This will delete the user as your delegate.

My Delegates

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

✕ **Colette Williams**
Asst. Director University Process Improvement

✕ **Carol Laney**
Business Process Analyst

Approval Delegate

Only Financial Mangers and Designees can assign an Approval Delegate. If you need to have someone temporarily approve pre-approvals or expenses on your behalf, such as 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**. Only Financial Managers or Designees can be assigned this role.

My Approval Delegate

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

⊕ Add Approval Delegate
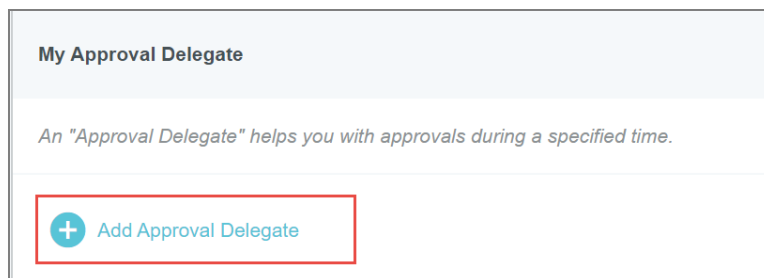
You will be able to choose the approval delegate from a searchable list and set the **Start Date** and **End Date** for the authorization to approve expenses on your behalf.

The delegate's name will appear with the range of dates during which he or she may approve expenses on your behalf. You may designate up to two approval delegates but **only have one approval delegate** approving for you at a time. If you attempt to schedule a second delegate for a period that overlaps with that of your other approval delegate, you will receive an error message.

My Approval Delegate

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

Select a User

Colette Williams

Start Date

05/01/2020

End Date

05/31/2020

Save   Cancel

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 de-authorize 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** circle next to his or her name.

My Approval Delegate

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

✕ **Robin Stewart(07/13/2020-07/14/2020)**
Exec Dir Stratgic Init Aux Ops   ✎