

Managing Delegates in Chrome River

Adding a delegate to your Chrome River profile allows them to arrange and reconcile expenses on your behalf. Chrome River Delegates create expense reports, reconcile expenses, and request reimbursements on behalf of expense owners. Delegates have full access to the expense owner's Chrome River account and can be added and removed easily.

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Add a Delegate

Establish another user as your delegate by logging into Chrome River, clicking **your name** in the upper right corner and selecting **Settings**.



Within the Settings menu, click on the Delegate Settings tab and select Add New Delegates.

E	CER + New 1 Juliet F	Roberts		
Juliet Roberts Sr Train & Document Specialist -	My Delegates			
0002463001	A "Delegate" is someone who has full access to your account.			
Personal Settings				
Preferences Settings	+ Add New Delegates			
Delegate Settings	My Approval Delegate			
Notification Settings	wy Approval Delegate			
	An "Approval Delegate" helps you with approvals during a specified time.			
Privacy Policy				
	+ Add Approval Delegate			
About Chrome River				

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In the search box, enter the **university ID (UID#)**, also known as the employee ID number, of the Delegate to add. If you don't know the UID#, search using their name. It is not possible to search for delegates by username.

If the search yields multiple results, be sure to select the one that matches the position description of the delegate for which you are looking.

E	/ER	+ New	1 Juliet Roberts		
Juliet Roberts Sr Train & Document Specialist -	My Delegates				
0002463001	A "Delegate" is someone who has full access to your account.				
Personal Settings					
Preferences Settings	Sarah Chavez		Cancel		
Delegate Settings	Sarah Chavez Student Temporary Staff - 2000292783				
Notification Settings	Sarah Chavoz				
5	Training and Documentation Spe - 0002000838	8	t time.		
Privacy Policy					
About Chrome River	Add Approval Delegate				

After selecting the correct delegate, their name appears under "My Delegates."

E	+ New	1 Juliet Roberts			
Juliet Roberts Sr Train & Document Specialist -	My Delegates				
0002465001	A "Delegate" is someone who has full access to your account.				
Personal Settings					
Preferences Settings	X Sarah Chavez Training and Documentation Spe - 0002000)838			
Delegate Settings					
Notification Settings	+ Add New Delegates				

In the example above, Sarah Chavez has been added as a delegate for Juliet Roberts. Sarah can now access Juliet's Chrome River account and complete tasks on her behalf.



Remove a Delegate

Delete a delegate by logging into Chrome River, clicking **your name** in the upper right corner and selecting **Settings**.

				-	<mark>⊢</mark> New	💄 Juliet Roberts	
	0	0	0		1	Juliet Ro Last login:	berts 02/27/2020 at 2:58 PM
EXPENSES	Draft	Returned	Submitted Last 90 Days		¢	Settings	
					?	Help	
				Please include "Travel impair Name and Business Purposi and credits due to COVID-19	€	Logout	

Within the Settings menu, click on the **Delegate Settings** tab. Delete the delegate by clicking the **"X"** next to their name.

ECHROMERIVER			
Juliet Roberts Sr Train & Document Specialist - 0002465001	My Delegates		
	A "Delegate" is someone who has full access to your account.		
Personal Settings Preferences Settings	X Holly Hooper Admin Sec - 0003548957		
Delegate Settings Notification Settings	X Sarah Chavez Training and Documentation Spe - 0002000838		
Privacy Policy	+ Add New Delegates		

In the example above, Sarah Chavez will be deleted as a delegate for this user and Holly Hooper will remain unaffected. Alternatively, the delegate can delete themselves by logging into the user's profile and following the same steps.