Assigning & Removing Delegates

Similar to the current TEM system, Chrome River offers the ability to assign delegates. All of the individual’s delegates that are currently setup in the TEM system (as of August 5th 2019) will automatically import into Chrome River. In order to add additional delegates after initial launch, Chrome River travelers will have to follow the steps provided in this training document.

There are two different types of delegates in Chrome River:

1. **My Delegates**: assigning delegates who have full access to my account
2. **My Approval Delegate**: A delegate who can assist with a user’s approvals during a specified time. Note: This is not for group approvals (i.e. Level 1 Org Approval), but for solely individual approvals. The following 2 are individual approvals **(not expense owner approval)**:
   a. Financial Manager Approval (Will route to the My Approval Delegate instead of the individual financial manager)
   b. OSP Approver

**Important Note**: Traveler’s maintain their own delegate list. Someone who is already a traveler’s delegate can add additional delegates to that traveler or remove them on their behalf.

**My Delegates**:

1. Select on the username (**the traveler and this will be their delegates**) to bring up the drop-down menu.
2. Settings: Select this button to bring up the “Settings” menu.

3. Delegate Settings: Select this button to bring up the “Delegate” menu.
4. **Add New Delegates:** Select this button and choose which individual can act as this user’s delegate (i.e. they can submit ERs, PAs, and edit settings on your behalf). Note: The user can search by the delegate’s first name, last name, title, or PID.

5. **Add New Delegates:** If there is another individual to act as this user’s delegate, select this button again and choose them.

6. **Select the Chrome River home button** to exit out of the “Settings” menu.
7. Now when the delegate signs in, they now have access to the user’s dashboard. Select the username to bring up the drop-down menu.

8. The user whom the delegate has access to can select their name here and enter their dashboard to insert ERs, PAs, etc.
My Approval Delegate:

Just a reminder: This delegate can assist with a user’s approvals during a specified time. Note: This is not for group approvals (i.e. Level 1 Org Approval), but for solely individual approvals. The following 3 are individual approvals:

a. Financial Manager Approval (Will route to the My Approval Delegate instead of the individual financial manager)
b. OSP Approver

1. Add Approval Delegate: Select this button to enter in the “Add Approval Delegate” function.
2. Select the User who will act as this individual's Approval Delegate
3. Insert the Start Date of when this user will begin to be their Approval Delegate
4. Insert the End Date when this role will finish
5. Select Save to complete these changes

6. Select the Pencil icon to make edits to this role (i.e. change the date range or user)
Removing Delegates:

In the case that the user no longer needs to be a traveler’s delegate, they can remove themselves from this role (or the traveler can do this on their own as well).

1. Select the traveler’s name to enter their dashboard

2. Settings: After the user is in the traveler’s dashboard, select this button to enter the delegate’s settings
3. Select the “X” button next to the delegate’s name to remove them from this traveler’s profile.

The delegate has now been removed. In order to finalize these changes, the user needs to log out and log back in.
The user now no longer has access to this traveler.