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Introduction

Chrome River is an online application for travel and expense reimbursement and PCard reconciliation. This system replaces BannerWeb Travel & Expense Report and Check Request Form for reimbursements and PaymentNet for PCard reconciliation.

Chrome River provides a fully electronic solution for expense reimbursement and PCard reconciliation. Receipts can be emailed, uploaded, or sent from your phone, so users no longer need to keep paper receipts and tape them onto paper for submission. Offering integrated per diem rates, international exchange rates, and a mileage calculator, the system allows travelers to quickly enter these expenses without needing to reference other websites or print out documentation.

Reports are submitted electronically and automatically route to the appropriate approvers (by email) and then to Accounts Payable or the PCard Office, and users can track where their report is in the process at any time. The system simplifies the work of approvers by flagging many potential compliance issues and delivering reports, along with attached receipts, business purposes, and any explanations provided by the submitter, right to their email.

Important Changes

There are some important changes to reimbursement and PCard reports to highlight.

Approval routings are automatically assigned in the system based on University policies. The approval routing for all charges submitted on expense reports and PCard reconciliations will include both the supervisor of the report submitter (as recorded in Banner) and the financial manager for any charged Index. For a given report, if the supervisor and submitter are the same person, they will only be required to approve the report once.

Students do not have Chrome River accounts, so all student reimbursement requests must be entered by a staff member. Per the [Policy on Provision of Financial Resources to Students](#), all student reimbursements must be approved by an appropriate VP, Dean, or Director (this replaces the supervisor approval step in Chrome River), and the staff member entering the report will be responsible for selecting the appropriate approver.

Anyone requesting a cash advance will be required to do so through a pre-approval report in Chrome River (see [Creating a Pre-Approval Report](#)). The pre-approval report is also available for use by any units that require travelers to seek formal authorization prior to traveling using university funds.

Lastly, PCard transactions will not post to Banner until the cardholder has submitted them on a Chrome River report and the report has been approved by all necessary approvers (charges will no longer post to a default Index/Account if no reconciliation is completed by the card allocator).

Logging in to Chrome River

To access Chrome River, visit <https://chromeriver.richmond.edu>.

You will use your University NetID and password to log in.

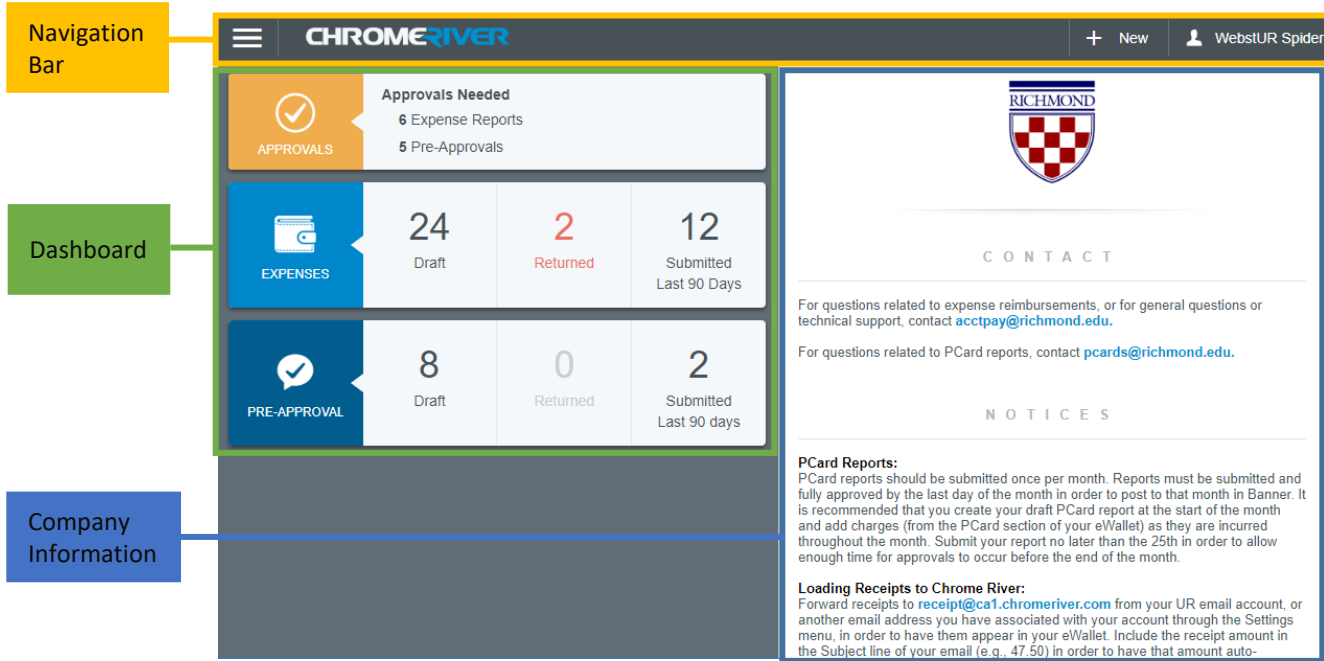
If you have any difficulty accessing the site, please contact Accounts Payable at 289-8179 or acctpay@richmond.edu.



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Chrome River Home Screen Navigation

Once logged in, you will arrive at the Chrome River home screen. At the top of the screen, you will find the **Navigation Bar**. The left side of the screen contains your **Dashboard**, and the right side of the screen contains **Company Information**.



Navigation Bar

The **Navigation Bar** remains at the top of your screen while logged in to Chrome River and provides quick access to several helpful functions.



Menu Button – Clicking on the Menu Button will expand a menu offering access to submitted receipts, PCard charges, expense and pre-approval reports, approvals (if applicable), inquiry functionality, and admin settings

Chrome River Logo – Users can click this logo at any point to return to the Home Screen

+ New Button – Clicking this button will provide the option to create either a pre-approval or expense report

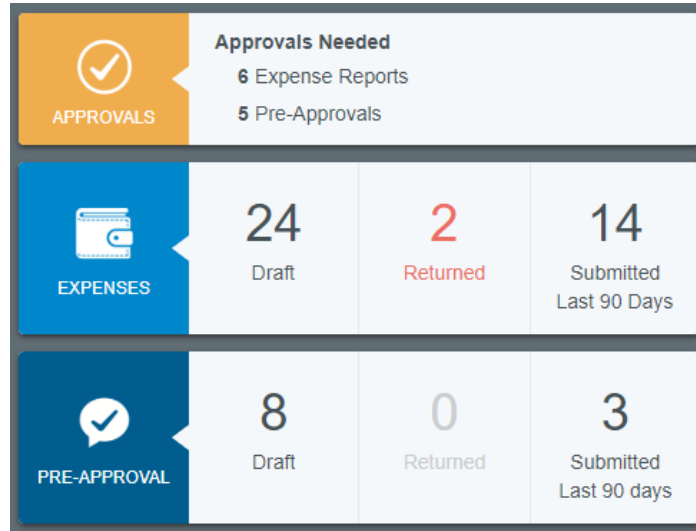
User Icon – Clicking this will expand a menu providing access to administrative settings, help resources, and logging out. Additionally, if another user has provided you delegate access to their account, you can log in to their account through this menu



CHROME RIVER USER MANUAL

Dashboard

The dashboard on the left side of the home screen provides quick access to a user's reports and any reports awaiting approval, if applicable.



Approvals – This will appear for any users with a report awaiting their approval. Users who are not approvers will not see this box, and once an approver has approved all reports in their queue, this box will disappear.

Expenses – Users can access any draft expense reports, any expense reports returned from an approver for updates/corrections, and any expense reports submitted by the user in the last 90 days. Reports submitted more than 90 days ago can be accessed through Chrome River's Inquiry functionality.

Pre-Approval – Users can access any draft pre-approval reports, any pre-approval reports returned from an approver for updates/corrections, and any pre-approval reports submitted in the last 90 days. Reports submitted more than 90 days ago can be accessed through Chrome River's Inquiry functionality.

Company Information

This section includes helpful information for users including contacts, important notes, and links to training materials. It will be updated as needed to provide relevant information to users.

System Setup

While Chrome River has been configured to offer an easy, intuitive experience for users, there are some actions new users may want to take to further improve their experience.

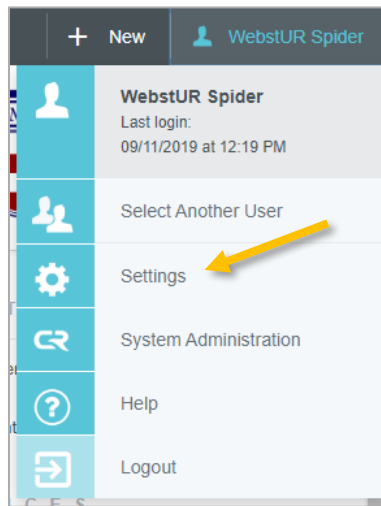
Add an Alternate Email

All users have been set up in the system using their richmond.edu email address. Any receipts forwarded into the Chrome River system from a user's richmond.edu address will automatically appear in that user's eWallet. However, some users may want to submit emailed receipts from a non-UR Email Address. Accordingly, you can link a non-UR email

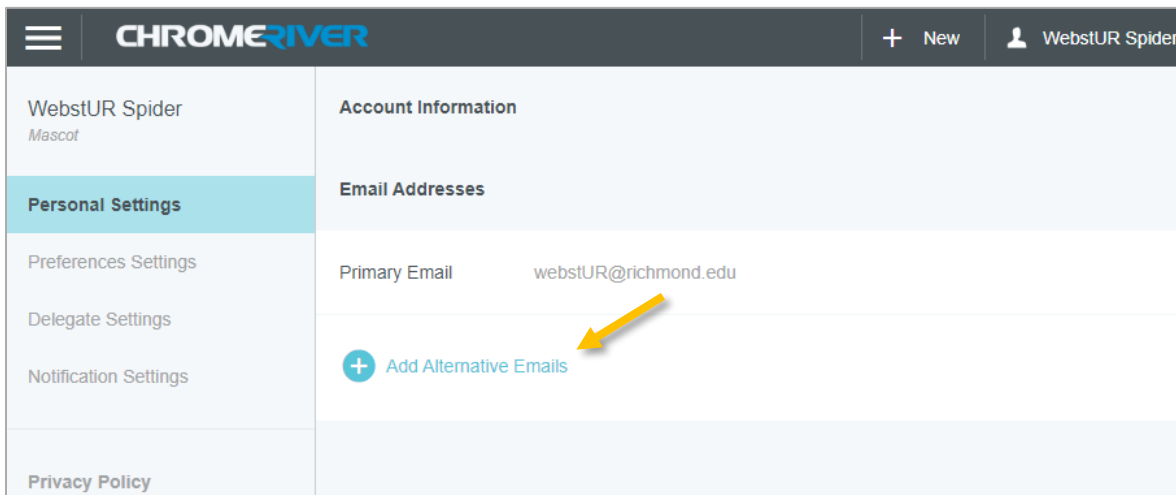


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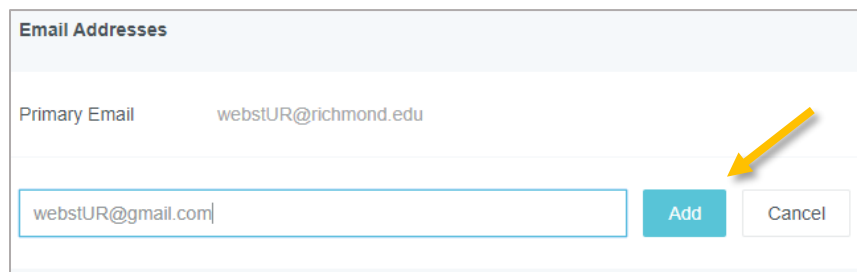
address to your account. To do so, click the **User Icon** displaying your name in the right corner of the Navigation Bar, and click **Settings**.



Under **Personal Settings**, click **Add Alternative Emails**.



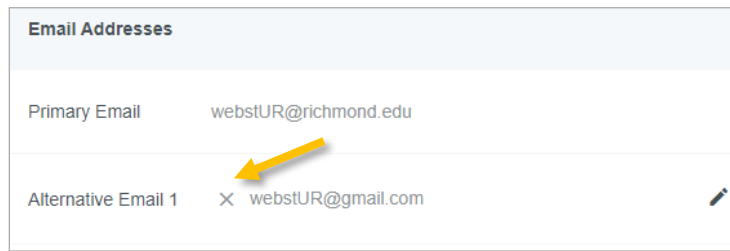
Enter your non-UR email address and click **Add**. You will receive a message indicating that a verification email has been sent to your richmond.edu email address. Follow the link in the email to verify the additional email address.





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You can add as many alternative emails as needed. To remove an alternative email, simply click the **X** next to the listed email address, and confirm by clicking **Delete**.

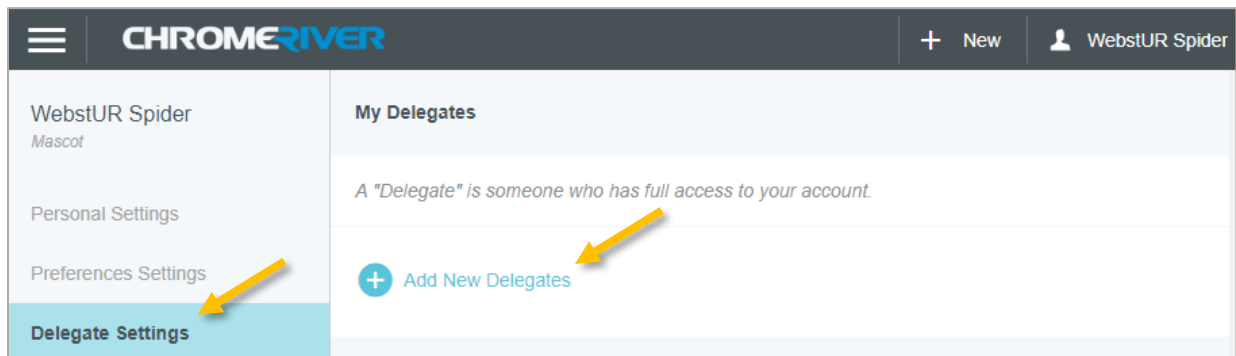


Add a Delegate

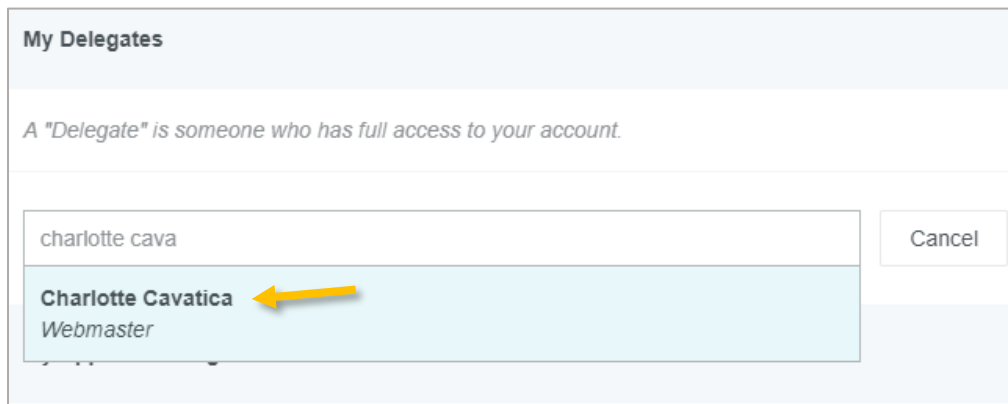
If you would like to provide another user access to your account so they can create reports on your behalf, you will need to add them as a delegate. Giving another user delegate access will allow them to access your Home Screen, Settings, and Inquiry reports.

To add a delegate, click on the **User Icon** with your name on the right side of the Navigation Bar and click **Settings**.

Under **Delegate Settings**, click **+ Add New Delegates**.



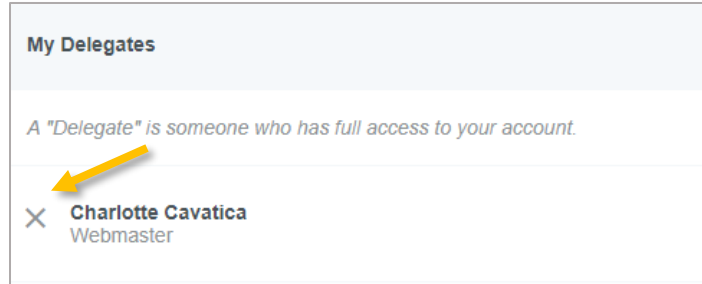
Begin typing the user's name and it will appear in the dropdown menu. Click on his or her name to add as a delegate.



You may remove delegate access at any point by simply clicking the **X** next to the delegate's name.



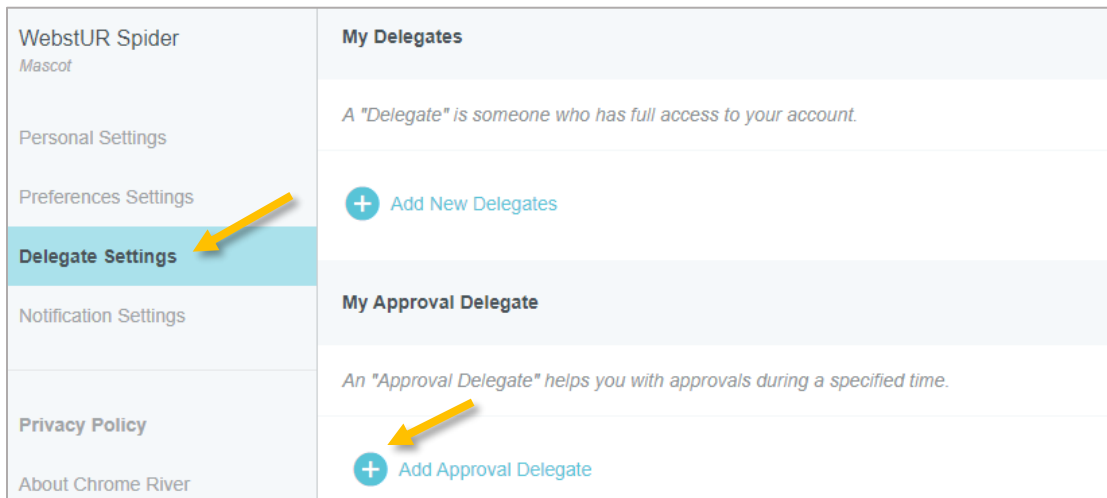
CHROME RIVER USER MANUAL



Add an Approval Delegate

Approvers can also assign another user as an approval delegate to temporarily approve expenses on their behalf. Note that, per the [Use of University Funds and Financial Responsibilities](#) policy, approval delegation may only occur on a temporary basis (e.g., while an approver is on vacation). Any long-term delegation of approval responsibilities must be discussed with and approved by the University Controller.

To add an approval delegate, click on your name in the upper right corner and click **Settings**. Under **Delegate Settings**, click **+ Add Approval Delegate**.



Begin typing the employee's name and it will appear in the dropdown menu. Enter a **Start Date** and **End Date** for approval delegation access and click **Save**. The system will send an email to the approval delegate letting them know of the approval delegation assignment and the applicable dates. You may only have one approval delegate assigned at a time.



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During the time period when an approval delegate has been assigned, all reports needing approval will go to the delegate and not to the original approver. At the end of the period specified, the system will automatically deauthorize the approval delegate and return to the default approval routing. However, all reports that were routed and approved during that period will remain in the approval delegate’s queue.

You may remove approval delegate access at any point by simply clicking the **X** next to the delegate’s name.

[Download the Chrome River and/or Chrome River SNAP Apps for iOS or Android](#)

Chrome River offers two apps—Chrome River and Chrome River SNAP. The Chrome River app offers users the same experience as the desktop site, allowing you to create, submit, or approve expense reports and capture and upload receipts right when an expense occurs. However, if you’re just looking to submit receipts, Chrome River SNAP is a supplemental app that offers a single-use experience allowing users to take photos of receipts that are automatically uploaded to the user’s Receipt Gallery for use in Chrome River.

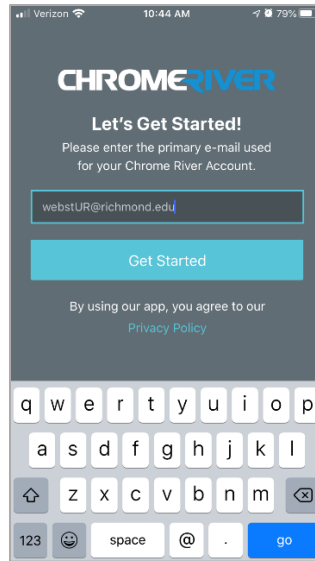
Download either app from the App Store or Google Play by searching “Chrome River” or “Chrome River SNAP.”

Chrome River App

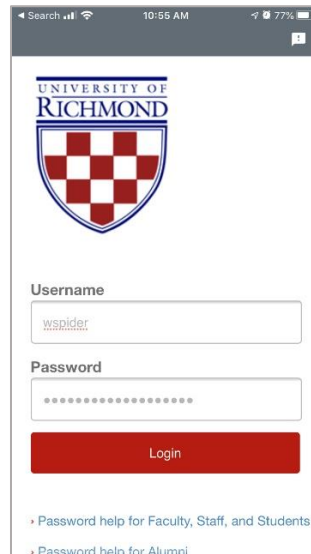
Once you have installed the app, open it, and you will be asked to enter the primary email address used on your Chrome River account, which is your richmond.edu address. Enter and tap **Get Started**.



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You will now be redirected to a sign-in screen where you will enter your URID and University password. Click **Login** and you will be signed into the app.



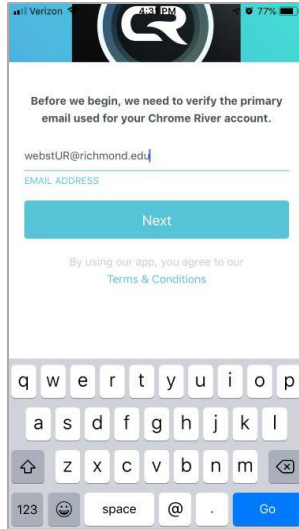
Note that you must provide the app access to your camera in order to use the receipt capture functionality. For additional instructions on how to use the app to submit receipts, see [Uploading Receipts Using App](#).

Chrome River SNAP

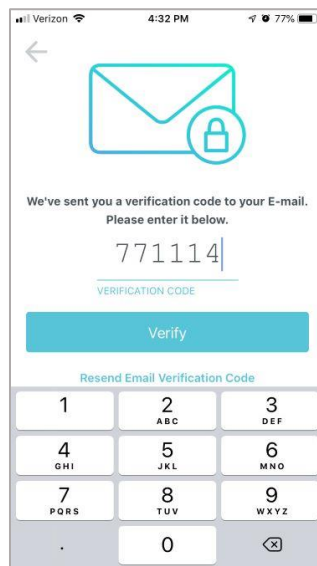
Once you have installed the app, open it, and you will be asked to enter the primary email address used on your Chrome River account, which is your richmond.edu address. Enter and tap **Next**.



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An email with a verification code will be sent to this address. Enter the code in the app and tap **Verify**. Note that you must provide the app access to your camera in order to use it.



For additional instructions on how to use the SNAP app, see [Uploading Receipts Using App](#).

Travel App Integrations

Chrome River offers expense integration with several travel apps, including Lyft, Uber, Grab and SpotHero. These apps allow users to create business profiles and connect them to their Chrome River account, allowing for selected receipts to feed directly into Chrome River for reimbursement. If interested in setting up integrations for any of these apps, the following links will provide the most up-to-date instructions for how to do so:

- [Lyft](#)
- [Uber](#)
- [Grab](#)



- [SpotHero](#)

Now you're ready to begin creating and submitting reports!

Creating a Pre-Approval Report

For any units that require travelers to seek formal authorization prior to travel using or spending university funds, Chrome River allows users to submit pre-approval reports. Users will also be required to submit a pre-approval report for any cash advance requests.

To create a pre-approval report, click **+ New** on the Navigation Bar and **New Pre-Approval Report**.



Report Header

This will bring you to the pre-approval report header. All fields are required, except where labeled as optional.

The screenshot shows the 'Pre-Approvals For WebstUR Spider' form. The form has a 'Cancel' button and a 'Save' button at the top right. The form fields are as follows:

Report Name	National Mascot Conference 2019
Start Date	09/01/2019
End Date	09/04/2019
Number of Days	4
Business Purpose	Attend the National Mascot Conference for professional development and to network with other mascots
Description <small>Optional</small>	
Pre-Approval Type	Domestic Travel
Trip Destination	Orlando, FL
Cash Advance	No Advance Requested



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Description of the fields are below:

- **Report Name** – Enter a descriptive, unique report name
- **Start Date** – Click the calendar icon to select the start date of your trip. If this is a non-travel pre-approval, enter the expected date of the transaction
- **End Date** - Click the calendar icon to select the end date of your trip. If this is a non-travel pre-approval, enter the expected date of the transaction
- **Number of Days** – This will calculate automatically based on the start and end date entered
- **Business Purpose** – Provide a detailed explanation of the business purpose of this request, including who, what, where, and why, as appropriate
- **Description** – Enter any necessary additional information here. This field is optional
- **Pre-Approval Type** – Select **Domestic**, **International**, or **Non-Travel**
- **Trip Destination** – If the Pre-Approval Type of Domestic or International is selected, enter the trip destination (City, State for Domestic or Country for International – begin typing to filter and find the appropriate destination). This field does not appear for non-travel pre-approvals
- **Cash Advance** – If requesting a cash advance, select **Cash Advance Requested**. Note that per the [Travel Policy](#), travel advances must be requested and approved through a pre-approval report and are only allowed in limited circumstances, typically when a credit card cannot be used as an appropriate or effective means of payment. Also, note that any cash advances granted via a pre-approval will need to be cleared via a submitted expense report. See the [Cash Advance](#) and [Cash Advance Return](#) sections under Expense Reports to learn more.
- **Cash Advance Amount** – If you selected **Yes** for Cash Advance, you will be asked to enter the amount being requested.
- **Index (Allocation)** – Select the Index(s) where the spending will be charged. To add more than one index, click + **Add Allocation**. (Note that for pre-approval reports, the Index is only specified on the header, not on the individual expenses on the report.)

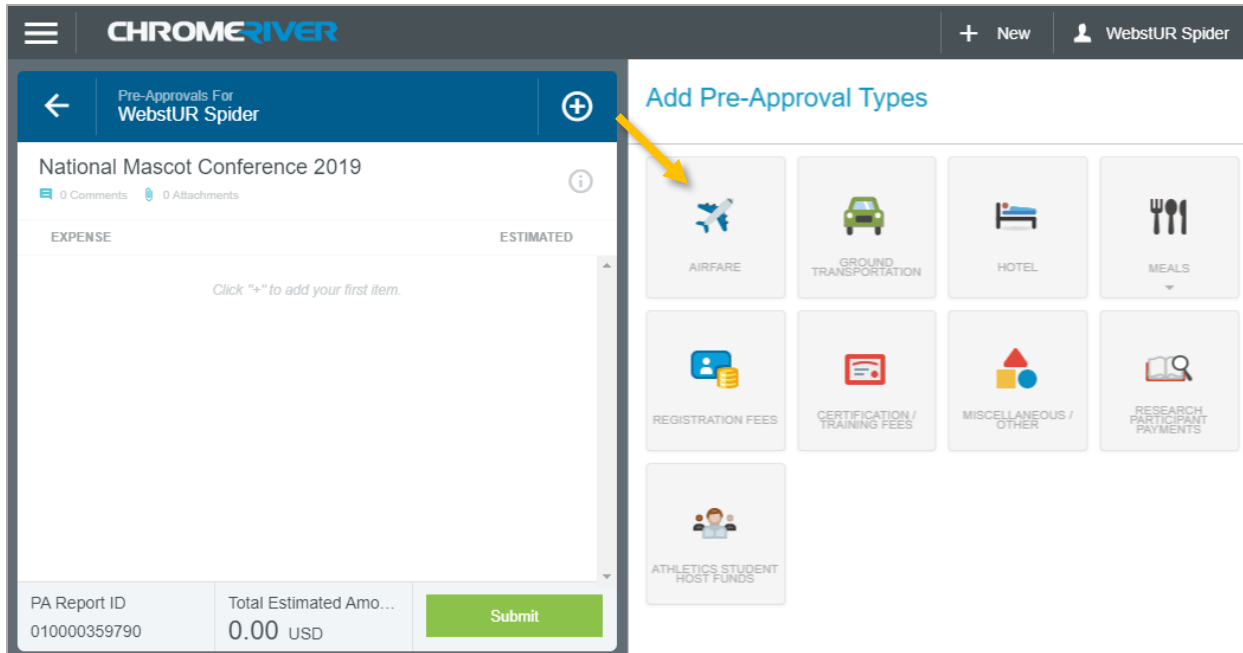
Once complete, click **Save** in the top right corner, and the Add Expenses window will now appear.

Add Expenses

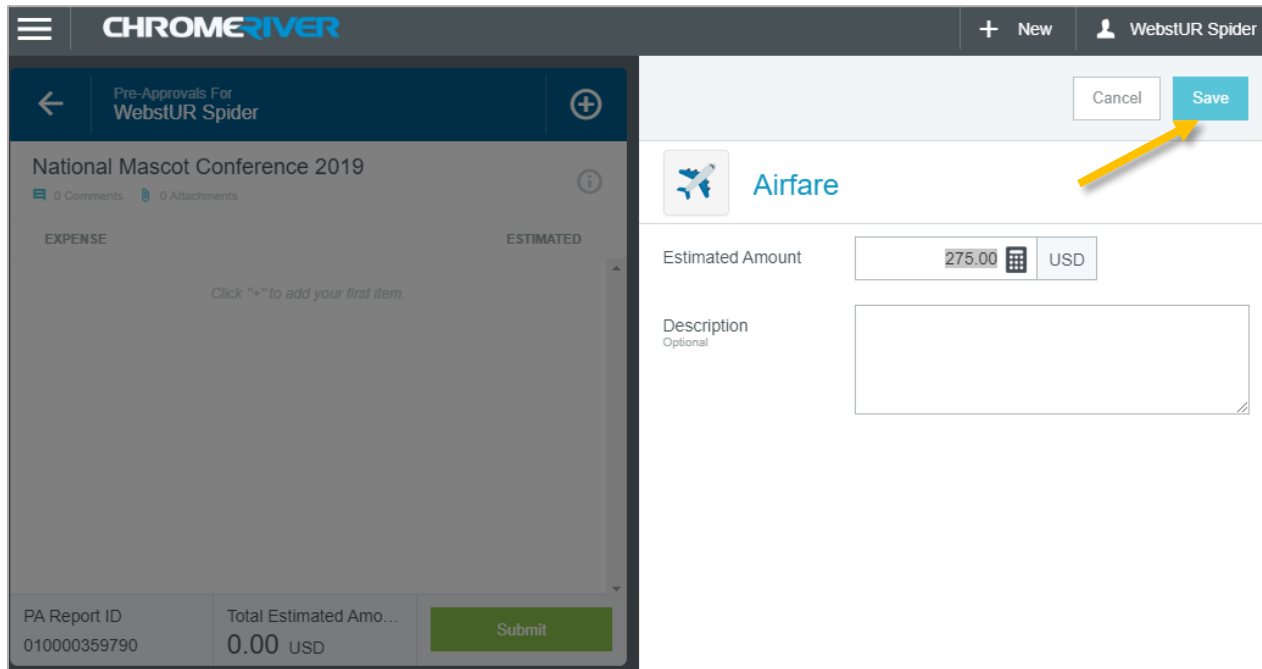
The expense tile mosaic will now display, allowing you to add expenses to your pre-approval report. To add an expense, simply click on the expense tile and complete the form that displays. Note that any tiles with a downward facing arrow at the bottom middle are “parent” tiles that have additional expense tiles organized under them. (Example: **Per Diem** and **Travel Meals** are located under **Meals**.) The parent tile cannot be added to a report but any tiles under it can.



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Once you enter all the required information on the form for the selected expense tile, click **SAVE** in the top right corner. (For guidance on completing the per diem expense form, see [Per Diem Expenses](#).)



The expense will be added to your pre-approval report and listed in the report summary on the left side of the screen. You may continue adding additional expenses by clicking on the expense tiles in the mosaic to the right and following the same steps listed above.



CHROME RIVER USER MANUAL

EXPENSE	ESTIMATED
Airfare	275.00 USD

PA Report ID: 010000359790 | Total Estimated Amo...: 275.00 USD | **Submit**

Submit Report

After adding all appropriate expenses, you can submit the report by clicking the green **Submit** button at the bottom of the report summary.

EXPENSE	ESTIMATED
Airfare	275.00 USD
Hotel	450.00 USD
Meals - Per Diem	52.80 USD
Meals - Per Diem	66.00 USD
Meals - Per Diem	66.00 USD
Meals - Per Diem	33.00 USD

PA Report ID: 010000359790 | Total Estimated Amo...: 942.80 USD | **Submit**

Report Name: National Mascot Conference 2019
Start Date: 09/01/2019
End Date: 09/04/2019
Number of Days: 4
Pay Me In: USD - US Dollars
Business Purpose: Professional development and networking with other mascots

This will display a summary of your report and ask you to confirm your submission. If you need to make additional changes to your report, click **Cancel**, and you will return to the report. Otherwise, click **Submit**, and the report will route to the appropriate approver as designated in the system.

Submit Preapproval

I affirm that the expense estimates listed in this pre-approval are accurate and complete to the best of my knowledge. I understand that I must submit an expense report with actual spending and appropriate documentation within 60 days of the end of my trip or event in order to be reimbursed for any out-of-pocket expenses.

Cancel **Submit**



Creating an Expense Report (including PCard)

Chrome River expense reports will be used for travel reimbursements, non-travel reimbursements or refunds, PCard reconciliation, and reimbursements or refunds to current students. To create an expense report, click **+ New** on the Navigation Bar and select **New Expense Report**.



Report Headers

This will bring you to the expense report header. The header captures the basic information that applies to every expense listed in your report. The header also captures what report type you will be submitting. The fields displaying and captured on the header may change depending on what **Report Type** is selected.

Cancel Save

C Expenses For WebstUR Spider

Report Name

For Expense Reports, please use a report name that is descriptive and unique. Examples: "NACUBO 2019 Annual Meeting", "Job Candidate Dinner – Asst Prof of Math", "Reimbursements – Aug 2019". For PCard reports, please include the card name and an indication of the date range in your report name. Examples: "Jane Doe's PCard Report – July 2019" or "Student Involvement 3 – 6/25/19 – 7/24/19".

Report Type

Business Purpose

Travel Reimbursement (Not a Student) Header

This report should be used for any travel reimbursements for either university employees and non-university employees, but excluding current students. Selecting the **Travel Reimbursement** Report Type will result in the following fields displaying on the header:

- **Report Name** – Enter a descriptive, unique report name
- **Business Purpose** – Provide a detailed explanation of the business purpose of this request, including who, what, where, and why, as appropriate
- **Trip Type** – Select a trip type. This selection will also correspond to the account code populated in Banner for this report:
 - Athletic Team Travel
 - Employee Travel
 - Non-Employee Travel
 - Recruiting Travel



- Student Travel
 - **Start Date** – Enter the start date of the trip
 - **End Date** – Enter the end date of the trip
 - **Travel Type** – Select **Domestic** or **International**
 - **Trip Destination** – This field will display after you have selected a Travel Type. Enter the trip destination (City, State for Domestic or Country for International)

After completing the expense report header, click **Save** at the top right of the screen and the **Add Expenses** screen will appear.

Non-Travel Reimbursement or Refund (Not a Student) Header

This report should be used for any non-travel reimbursements for either university employees and non-university employees, but excluding current students. Selecting **Non-Travel Reimbursement or Refund** Report Type will result in the following fields displaying on the header:

- **Report Name** – Enter a descriptive, unique report name
- **Business Purpose** – Provide a detailed explanation of the business purpose of this request, including who, what, where, and why, as appropriate
- **Payee Type** – Indicate whether the individual being reimbursed is a **UR Employee** or **Non-UR Employee**
- **Payee ID** – This will display if Non-UR Employee is selected as the Payee Type. Enter a Payee ID. Search the list by typing an ID or name, and select the appropriate payee. (If you do not find the party you are looking for, they are either not set up as a vendor or are inactive. For new vendors, complete the University New Vendor Request in BannerWeb. If you have a URID number, contact Accounts Payable to ask for the vendor to be reactivated.)
- **Address confirmation** – For non-UR employees, you will be asked to confirm whether the address listed in the Payee ID field is correct. If not it is not, you will be asked to enter the correct address. (Any vendors with [DD] listed before their address are set up for direct deposit and will not receive a mailed check, so you can simply select **Yes**.)

After completing the expense report header, click **Save** at the top right of the screen and the **Add Expenses** screen will appear.

PCard Reconciliation Header

PCard Reconciliation reports are used to reconcile items charged on a University of Richmond-issued procurement card. Transactions are automatically imported into Chrome River daily and will appear within the Card Allocator's profile. The PCard reconciliation report should only contain transactions occurring on a university PCard. Refunds and reimbursements should be submitted through one of the other report types.

PCard reports should be submitted once per month. Reports must be submitted and fully approved by the last day of the month in order to post to that month in Banner and appear on that month's budget report. It is recommended that you submit your report no later than the 25th in order to allow enough time for approvals to occur before the end of the month.

Selecting the **PCard** reconciliation Report Type, you will be asked to enter a **Report Name** and the **Business Purpose** box will disappear from the header, as you will instead enter the business purpose on each PCard expense.



After completing the expense report header, click **Save** at the top right of the screen and the **Add Expenses** screen will appear.

[Reimbursement or Refund to a Current Student Header](#)

This report should be used for any travel or non-travel reimbursements or refunds to current students. Selecting the **Reimbursement or Refund to a Current Student** Report Type will result in the following fields displaying on the header:

- **Report Name** - Enter a descriptive, unique report name
- **Business Purpose** – Provide a detailed explanation of the business purpose of this request, including who, what, where, and why, as appropriate
- **Student ID** – Enter the student ID. Search the list by typing the student ID or name and select the appropriate student
- **Address confirmation** – You will be asked to confirm whether the address listed in the Student ID field is correct. If not, you will be asked to enter the correct address. (Any students with [DD] listed before their address are set up for direct deposit and will not receive a mailed check, so you can simply select **Yes**.)
- **Travel-related expenses** – You will be asked to indicate whether or not this reimbursement is travel-related. If so, you will be asked to enter:
 - **Start Date** – Enter start date of the trip
 - **End Date** – Enter end date of the trip
 - **Travel Type** – Select **Domestic** or **International**
 - **Trip Destination** – Enter the trip destination (City, State for Domestic or Country for International)
 - **Trip Type** – Select either **Student Travel** or **Athletic Team Travel**, as appropriate. This selection will also correspond to the account code populating in Banner for this report
- **Approver** – Per the [Policy on Provision of Financial Resources to Students](#), payments to students may be authorized only by certain offices and in limited circumstances. You must selected the appropriate approver from this approved list

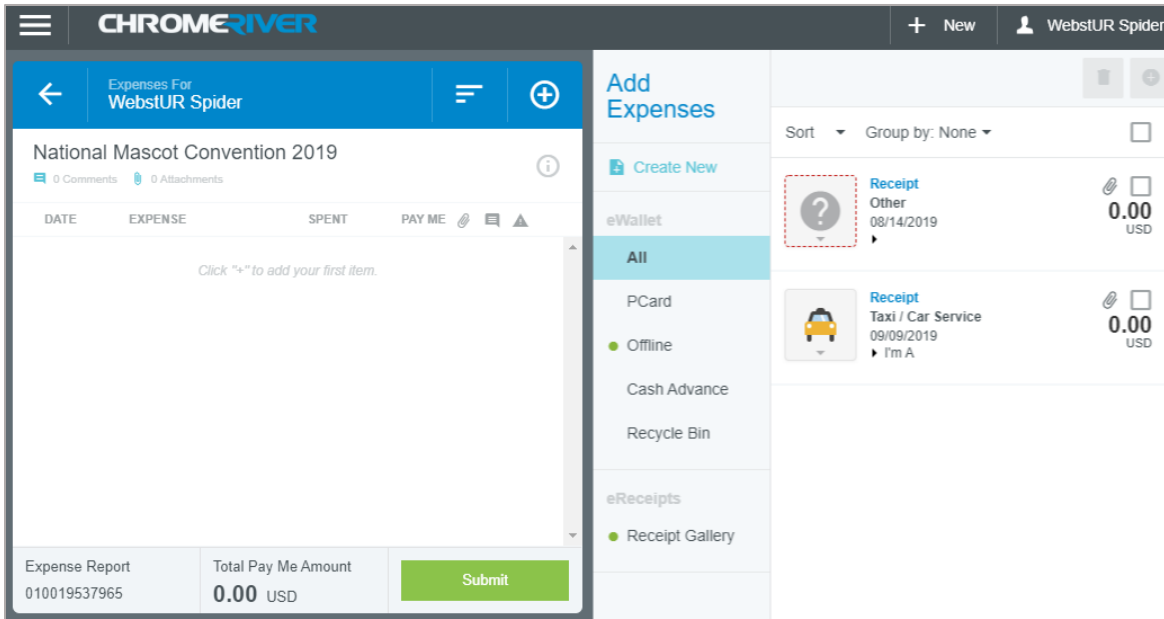
After completing the expense report header, click **Save** at the top right of the screen and the **Add Expenses** screen will appear.

[Adding Expenses](#)

After completing the expense report header, the **Add Expenses** screen should appear on the right. (If it does not, click the + button at the top of the report summary to the left.) The Add Expenses screen allows users to manually add expenses to their report, add expenses from their **eWallet**, or add expenses from their **Receipt Gallery**. A green dot next to an expense category in the eWallet or Receipt Gallery indicates there are unused items or receipts available for use.

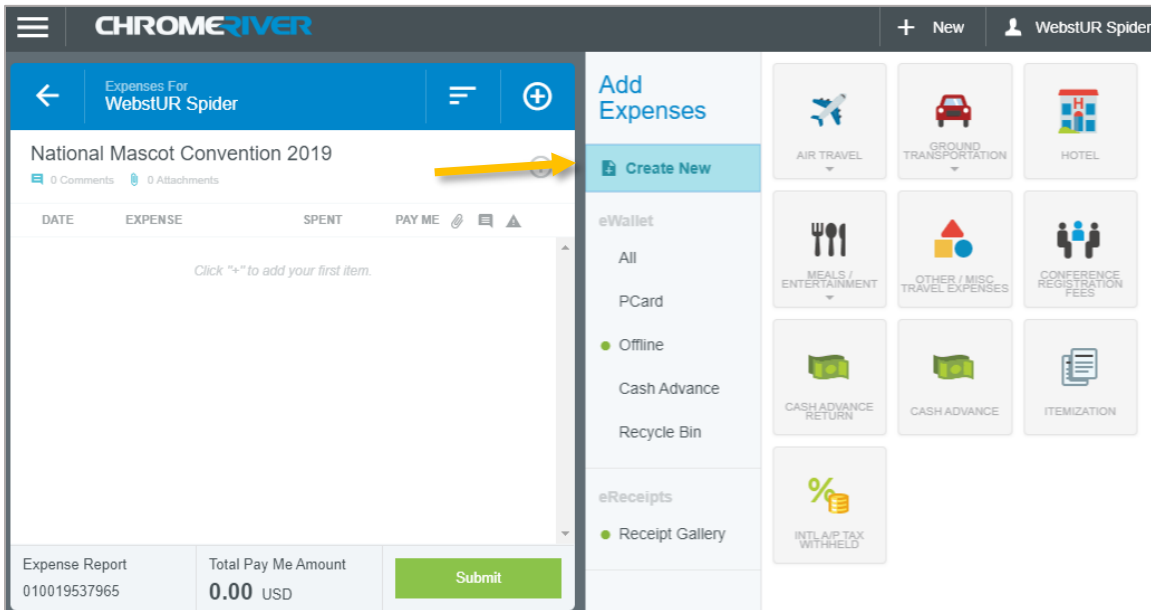


CHROME RIVER USER MANUAL



Create New

Selecting the **Create New** link allows the user to manually add direct expenses to the report. After clicking the link, you will be presented with an expense tile mosaic. Note that any tile with the small down arrow at the bottom is a parent tile with additional tiles nested under it. Clicking on the parent tile will display the children tiles. (Example: **Mileage** is located under the **Ground Transportation** tile.) A parent tile cannot be added to an expense report, but any tiles under it can.



Click the appropriate tile for the expense you are adding. Each tile is mapped to an account code. The tile selected will correspond with the account code that is recorded in Banner. For more information on which tile maps to which account, see the [Chrome River Account Code Mapping](#).



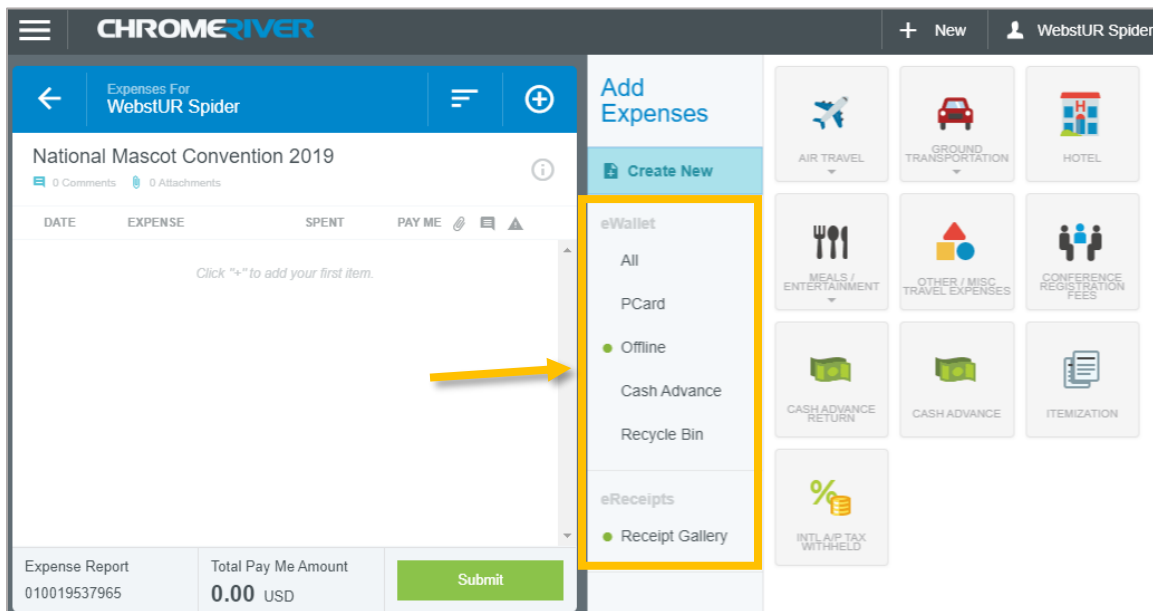
CHROME RIVER USER MANUAL

After selecting the expense tile, you will be asked to complete the corresponding Expense Form.

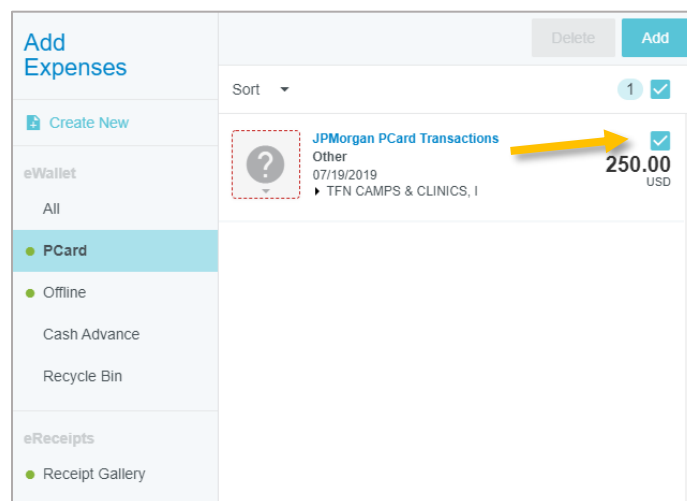
eWallet and eReceipts

In the **eWallet**, users will find any unallocated **PCard** transactions, expenses submitted via email or the app and sent to the Receipt Gallery (under **Offline**), and any previously approved and unused **Cash Advance** amounts. Clicking on the **All** section will display all items housed in the eWallet. Deleted items are accessible in the **Recycle Bin**.

Users can also access submitted receipts directly from the Receipts Gallery under **eReceipts**.



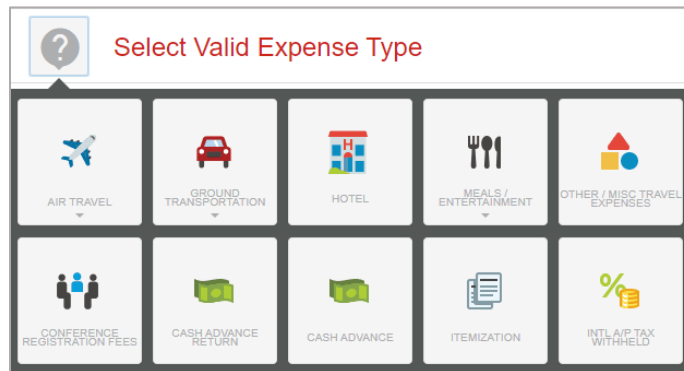
To add an item from your eWallet to an expense report, click the checkbox on the line, and click **Add** in the top right corner. This will create an expense item for this PCard transaction or receipt.



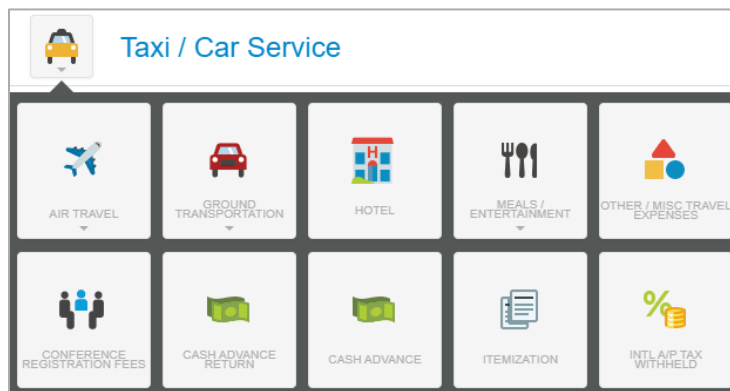


CHROME RIVER USER MANUAL

After adding a transaction to the report, you will be asked to **Select Valid Expense Type**. Select the appropriate expense tile for the transaction.



In some instances for PCard transactions, Chrome River may use the MCC Code of the vendor to automatically populate the expense type. Please review any of these instances to confirm they are accurate. If they need to be changed, click the tile, and you will be allowed to pick a different expense tile from the mosaic.



Each tile is mapped to an account code. The tile selected will correspond with the account code that is recorded in Banner. For more information on which tile maps to which account, see the [Chrome River Account Code Mapping](#).

After selecting the expense tile, you will be asked to complete the corresponding Expense Form.

Expense Forms

Each expense tile has a corresponding expense form. The expense form collects information relating to the expense and will vary depending on the tile selected. However, there are a couple pieces of information that will be collected on nearly every expense form.

Business Purpose

All Expense Report and PCard expense line items require a clear and detailed business purpose. A business purpose describes the expense as a necessary, reasonable, and appropriate business expense for the university.



CHROME RIVER USER MANUAL

Index (Allocation)

As previously referenced, the expense tile selected will map to an account code. The title of each tile should accurately reflect the account chosen, but if you are unsure or would like to see the underlying account code number of each tile, please see the [Chrome River Account Code Mapping](#) for guidance.

The **Index(s)** is assigned at the expense line level for Expense and PCard reconciliation reports.

Under the **Index (Allocation)** section of an expense item, begin typing the Index (you may type either the number or the index description) and select the appropriate Index from the list. Recently used indices will be listed at the top and noted with the clock icon to the left.

If you need to split the funding for an expense between multiple indices, click on the **+ Add Funding** button and repeat the steps above.

By default, the expense will be evenly split between the selected indices. You can manually change the allocated amounts by adjusting the percentage or dollar amount next to each funding line. The total percentage will be shown in gray at the bottom. Please confirm the adjusted totals add up to 100%. You can click **Split Equally** to distribute the expenses equally among all funding lines. You can click **Clear Splits** to zero out all but the first funding line, which will be allotted 100% of the expense. You can click the **X** to the left to remove a funding line.

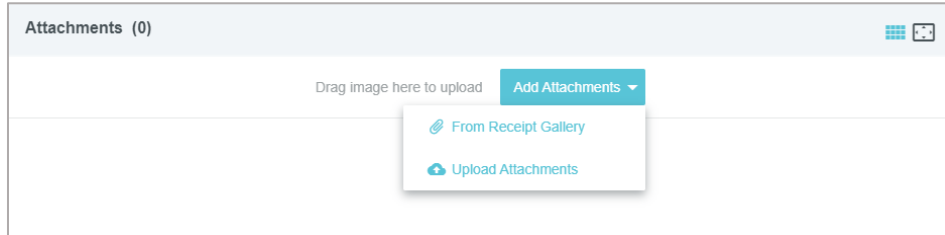
Index	Percentage	Dollar Amount
23456 School Spirit --	50%	13.71
65432 Fun Events --	50%	13.70
100%		27.41



CHROME RIVER USER MANUAL

Receipts

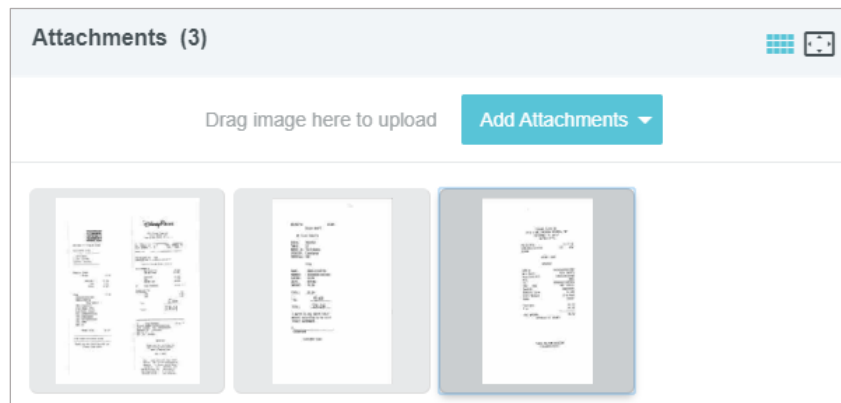
Nearly all expense types will require attaching a receipt (a few, such as mileage and per diem, do not). To do so, you can either attach a receipt from your Receipt Gallery or upload one from your computer.



For more detailed guidance on submitting receipts, see [Submitting and Managing Receipts](#).

Note that Chrome River uses optical character recognition (OCR) to attempt and extract data from the receipt image and populate this into the expense form where applicable. Make sure to verify the accuracy of any data that autofills from a receipt image and make corrections where appropriate.

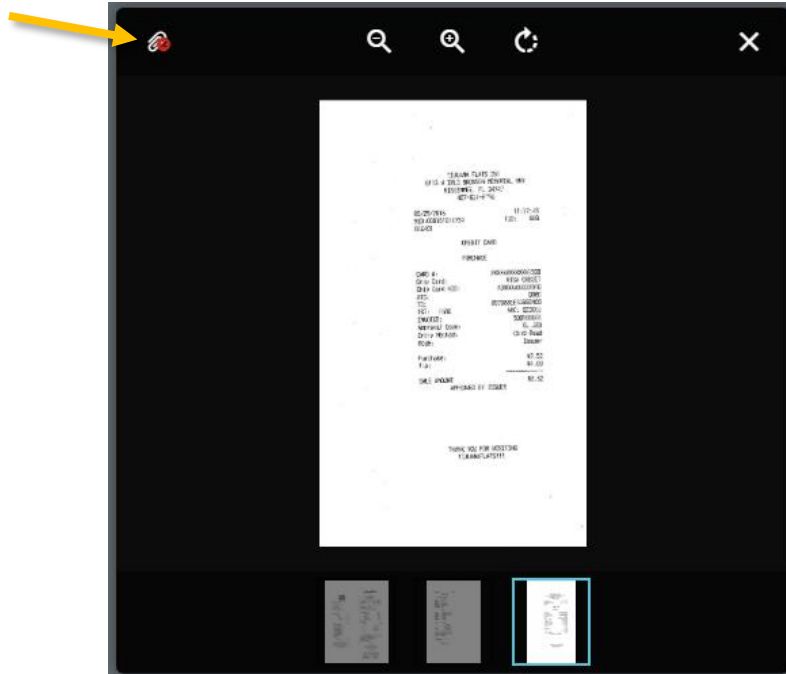
If you have added a receipt to a report but would like to remove it, select the appropriate receipt from under the **Attachments** section in either the report header or individual expense line. (Note: If selecting from the report header, ensure that you have the report open and are not in preview mode.)



The selected receipt will now display on the left side of the screen. Click on the **Delete Icon** (paper clip with red X symbol) in the top left corner, and the receipt will be removed from your report.



CHROME RIVER USER MANUAL



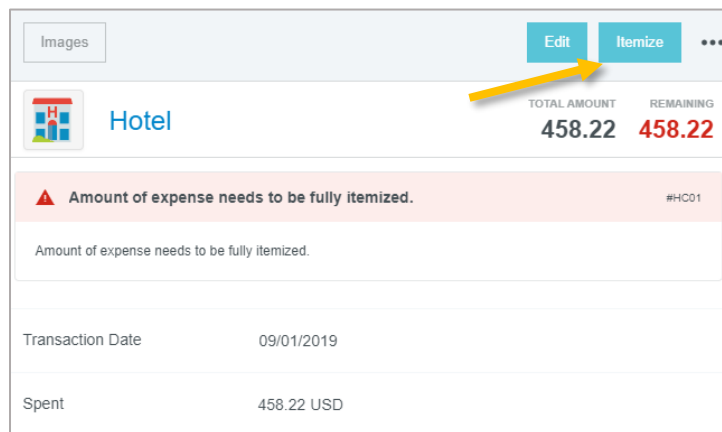
Special Expense Types

Some expense types have expense forms that require additional information or have different functionality, as explained below.

Hotel Expenses

In addition to room charges, hotel bills frequently include charges for items such as parking or meals. To make the process of reporting these quick and simple, the **Hotel** expense tile will require you to itemize the charges on your bill.

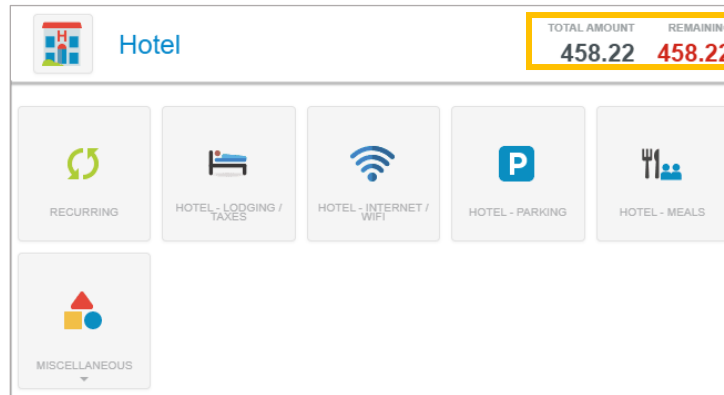
After completing the **Hotel** expense tile header, click the **Itemize** button in the top right corner. (Note: Any personal non-reimbursable charges on your hotel folio should be deducted and excluded from the **Spent** amount entered on the header.)





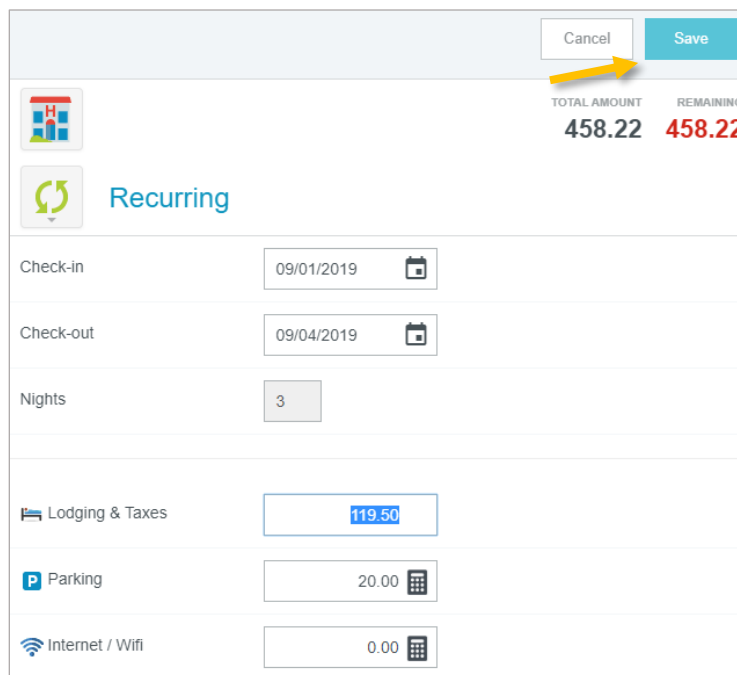
CHROME RIVER USER MANUAL

This will display a mosaic with a variety of hotel expense types by which you can itemize the total hotel expenses. The total amount of the bill entered on the header appears in the top right corner under **TOTAL AMOUNT**. The amount remaining to be itemized appears in red under **REMAINING**.



If your hotel bill has recurring charges that are the same amount for each night of your stay, you may use the **Recurring** tile to enter those expenses. This will allow you to enter recurring costs like lodging, internet/wifi, or parking once, then select the total number of nights to have the charges automatically totaled.

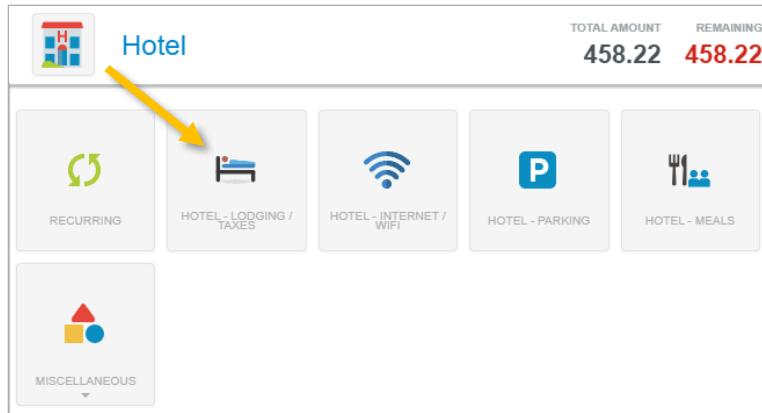
On the **Recurring** tile, enter the **Check-In** and **Check-Out** dates and the daily amounts for **Lodging** (including lodging taxes and fees), **Parking**, and/or **Internet**. Click **Save**, and the expenses will be added to your report.



If your hotel expenses did not stay the same or you would like to itemize individually, do so by tapping the appropriate expense tile. For example, to add the cost of lodging (including lodging taxes and fees) click the **Hotel – Lodging/Taxes** tile.



CHROME RIVER USER MANUAL



Complete the expense form and click **Save**, and the expense form will be added to your report. (Note: You do not need to create an individual expense for each night (i.e., you can create one Hotel – Lodging expense record that reflects the total cost of lodging including taxes and fees for your stay.))

		TOTAL AMOUNT	REMAINING
		458.22	458.22
Hotel - Lodging / Taxes			
Transaction Date	09/01/2019		
Spent	387.46	USD	
Business Purpose	Professional development and networking with other mascots		
Description	Optional		
Check In Date	09/01/2019	Optional	
Check Out Date	09/04/2019	Optional	

The expense will be added to the report summary on the left side of the screen and the Add Itemization page will again display on the right. The remaining amount to be itemized will be displayed in the upper right corner. If you have additional expenses on the bill beyond lodging, continue itemizing these expenses using the other available expense tiles until the bill has been fully itemized and the Remaining amount equals zero.

Once all expenses have been itemized, the Add Itemization window will disappear and all the itemized expenses will now appear on your report.



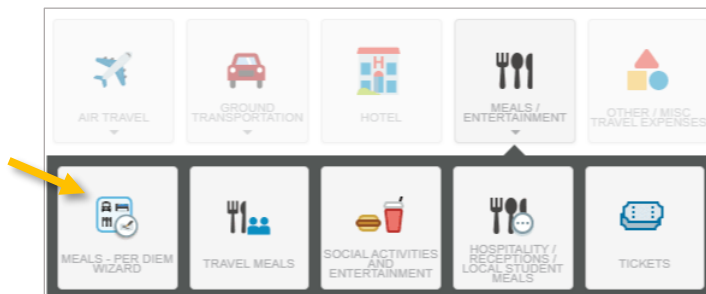
CHROME RIVER USER MANUAL

National Mascot Conference 2019				
0 Comments		1 Attachments		
DATE	EXPENSE	SPENT	PAY ME	
Sun 09/01/2019	Hotel	458.22 USD	458.22	
Sun 09/01/2019	Hotel - Lodging / Taxes	387.46 USD	387.46	
Sun 09/01/2019	Hotel - Parking	60.00 USD	60.00	
Sun 09/01/2019	Hotel - Meals	10.76 USD	10.76	

Per Diem Expenses

As specified in the University's Travel Policy, travelers have the option to claim per diem for travel meals in lieu of reimbursement using receipts (see the [Travel Policy](#) for additional details on per diem).

Travelers choosing per diem will claim it using Chrome River's Per Diem Wizard. Under the **Meals/Entertainment** tile of the expense mosaic, select **Meals – Per Diem Wizard**.







Enter the **Start Date** and **End Date**, and the number of **Days** will calculate automatically. If claiming only one day of per diem, you can enter the same start and end date. If not already populated, enter a **Business Purpose**. Select the **Location** of you travel. Begin typing and select the appropriate location of your travel.



CHROME RIVER USER MANUAL

Per Diem Wizard


Start Date: 09/01/2019  

End Date: 09/04/2019  

Days: 4

Business Purpose: Professional development and networking with other mascots


Description (Optional): Add Description

Location: los angeles 

- Los Angeles-Los Angeles County, California (CA), United States
- Los Nietos-Los Angeles County, California (CA), United States
- Palos Verdes Estates, Los Angeles County, California (CA), United States

Check this box to indicate the Athletics per diem rates should be used.

If you are claiming Athletics per diem rates, select the **Athletics per diem rates checkbox**. Finally, select the appropriate index under **Index (Allocation)**. Click **Add Entries** and the system will create per diem entries for each date in the date range entered, displaying them on the right side of the screen.

End Date	09/04/2019 			
Days	4			
Business Purpose	Professional development and networking with other mascots			
		DATE	LOCATION	AMOUNT
		× Sun, 09/01/2019	Los Angeles, California (CA), United States	66.00 USD >
		× Mon, 09/02/2019	Los Angeles, California (CA), United States	66.00 USD >
		× Tue, 09/03/2019	Los Angeles, California (CA), United States	66.00 USD >
		× Wed, 09/04/2019	Los Angeles, California (CA), United States	66.00 USD >

Clicking the arrow next to each entry will open the **Deductibles** section. Per the University’s Travel Policy, travelers may claim a meal per diem only for meals that were not otherwise provided during travel. If a meal is included in a conference, paid for by another colleague, vendor or other third party, or when traveling a partial day, the full per diem amount should not be claimed. To reduce a daily per diem, click on the appropriate entry and click the checkbox to indicate any meals that should not be reimbursed. When meals are marked in the Deductibles section, the system will automatically reduce the per diem to the appropriate amount per the University’s Travel Policy.



CHROME RIVER USER MANUAL

DATE	LOCATION	AMOUNT
× Sun, 09/01/2019	Los Angeles, California (CA), United States	52.80 USD
Deductibles		
<input checked="" type="checkbox"/> Breakfast	<input type="checkbox"/> Dinner	
<input type="checkbox"/> Lunch	<input type="checkbox"/> Additional Deduction	
× Mon, 09/02/2019	Los Angeles, California (CA), United States	66.00 USD

When finished entering any meal deductions, click **Add to Report** in the bottom right corner.

DATE	LOCATION	AMOUNT
× Sun, 09/01/2019	Los Angeles, California (CA), United States	52.80 USD
× Mon, 09/02/2019	Los Angeles, California (CA), United States	66.00 USD
× Tue, 09/03/2019	Los Angeles, California (CA), United States	66.00 USD
× Wed, 09/04/2019	Los Angeles, California (CA), United States	33.00 USD

Clear All **Add to Report**

Mileage Expenses

Users claiming expenses for use of their personal vehicle for travel will use the **Mileage** expense tile (located under **Ground Transportation**).

On the Mileage expense form, enter the date of travel (or the first day of travel for multiday trips) in the **Transaction Date** field, as well as a **Business Purpose**. Skip the description field at this point, as it will automatically be populated with the travel destinations after entering the Calculate Mileage information.

Next, select the **Calculate Mileage** link to access the integrated Google Maps functionality. Note that use of the Calculate Mileage functionality is required for mileage reimbursement.



CHROME RIVER USER MANUAL

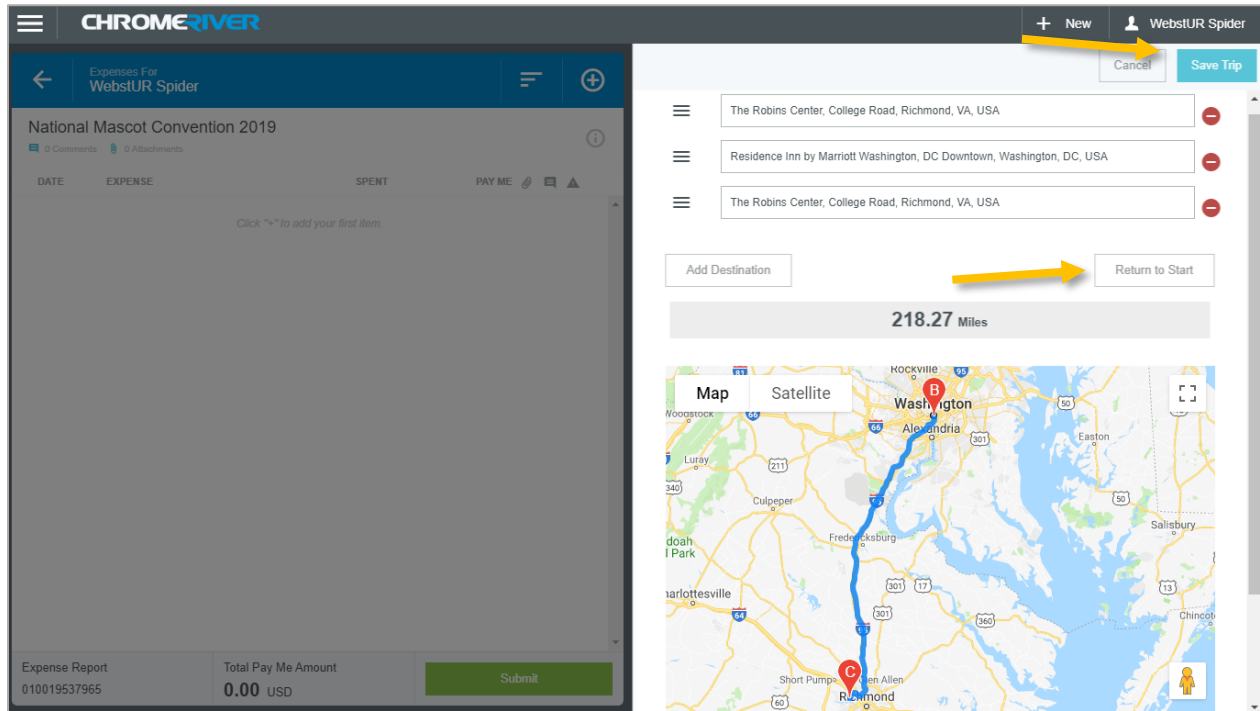
Begin entering a location name or specific address for start and end destinations. For trips with multiple stops, click **Add Destination** to add an additional destination.

Clicking **Return to Start** will add the first location as a new destination at the bottom of the list for roundtrip travel.



CHROME RIVER USER MANUAL

The distance and map will now reflect your route. This feature uses Google Maps and has similar functionality, including zoom controls and the ability to manually adjust the route to reflect alternate routes. Once satisfied with your route entry, click **Save Trip** to return to the Mileage entry screen.



The **Spent** and **Miles** fields have now been calculated and populated, and the **Description** includes the destination addresses entered.

Spent	118.96	USD
Business Purpose	Professional development and networking with other mascots	
Description	From:: The Robins Center, College Road, Richmond, VA, USA To:: Residence Inn by Marriott Washington, DC Downtown, Downtown, Washington, DC, USA To:: The Robins Center, College Road, Richmond, VA, USA	
Rate	0.545	
Miles	218.27	Calculate Mileage

You also have the ability to enter deductions for personal mileage. To deduct personal mileage, click the **None** box, which will allow you to select whether you would like to reduce the reimbursable **Distance** or reimbursement **Amount**.



CHROME RIVER USER MANUAL

Miles	<input type="text" value="218.27"/>	Calculate Mileage
Deduction	<input type="text"/>	None
Trip Type	Employee Travel	None Distance Amount
Is this Mileage with use of your Personal vehicle?	Yes	

Trip Type will default to the trip type selected on the report header, but it can be modified if applicable for this expense. You will also be asked to confirm whether this mileage was on a personal vehicle and to enter the appropriate index under **Index (Allocation)**. Once done, click **Save** to add the expense item to your report. (Note: Receipts are not required for mileage.)

Expenses with Guests

On certain expense tiles, such as **Business Meals** and **Travel Meals**, Chrome River will require you to provide a list or description of the guests in attendance.

For most meals, you will add the list of guests using the **Guest Widget**. The Guest Widget allows you to add both internal guests as well as external guests. To add internal guests, tap inside the **Add Guests** field and begin typing a name. A list of possible guests will appear. Click the desired name to add it.

Guests (1)

Internal	<input type="text" value="cavati"/>
Upload CSV	Charlotte Cavatica Webmaster University of Richmond
Internal x	Web Mas Univ
100 % 64.00	

To add external guests, change the selection box next to the Add Guests field to **External**. If the external guest has previously been entered in the system, you can search similar to internal guests and select the name to add it. Otherwise, you will click the **+ Add New External Guests** link.

Guests (1)

External	<input type="text" value="peter"/>
Upload CSV	No Results Found
Internal x	Web Mas Univ
100 % 64.00	



CHROME RIVER USER MANUAL

This will now ask you to enter the **First Name, Last Name, Title** and **Company Name**. Once you have entered all available and appropriate information, click **Add**.

Guests (1)

EXTERNAL

First Name

Last Name

Title

Company Name

Note that the system will automatically split the total cost of the bill evenly between the number of guests added. You can leave this as it is, as you are not required to individually itemize by guest.

Guests (2)

Internal

[Upload CSV](#)

Internal	x	WebstUR Spider <i>Mascot</i> <i>University of Richmond</i>	50 %	32.00
Internal	x	Charlotte Cavatica <i>Webmaster</i> <i>University of Richmond</i>	50 %	32.00
			100 %	64.00

For group meals with more than 10 people that cannot be easily identified, you do not need to use the Guest Widget. Instead, you will check the checkbox on the Expense Form indicating this was a group meal of greater than 10 people, and enter a description of the group and the number in attendance (e.g., Controller’s Office staff; 25 people) in the **Description** box.

Check this box to indicate this meal was for a group of >10 people (enter Description below).

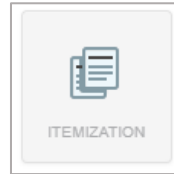
Description Optional



CHROME RIVER USER MANUAL

Itemization (Splitting Expenses Between Multiple Accounts)

In instances when a single receipt has expenses that need to be charged to different expense tiles (i.e., account codes), the **Itemization** expense tile can be used.



Enter the header information with the **Transaction Date**, **Amount Spent**, **Business Purpose**, **Description (Optional)**, **Merchant (Optional)**, and **Index (Allocation)**. (Note: You can change the Index listed on each itemized item on the list, so you only need to enter the Index of one of the items on the header screen.) Rather than attaching the receipt to an individual expense, you will attach your receipt to the header for itemization. After completing the header and attaching your receipt, click the **Itemize** button in the upper right corner of the form.

The screenshot shows the 'Itemization' form with the following fields and values:

- Transaction Date:** 09/06/2019
- Spent:** 632.84 USD
- Business Purpose:** Purchased miscellaneous supplies for a school spirit event
- Description (Optional):** (Empty text area)
- Merchant (Optional):** Collegiate Supplies Inc. |
- Index (Allocation):** 23456 School Spirit --

The 'Itemize' button in the top right corner is highlighted with a yellow arrow.

The **Add Itemization** screen will appear. The total amount of the receipt entered on the header appears in the top right corner under **Total Amount**. The amount remaining to be itemized appears in red under **Remaining**.



CHROME RIVER USER MANUAL

Select the appropriate expense tile for the first item. The corresponding expense form will open. Enter all appropriate fields, confirm the selected **Index (Allocation)** is correct. When finished, click the **Save** button located in the upper right corner of the form.

The **Add Itemization** screen will appear again. The **Remaining** amount will be updated to account for the first expense added. Select the proper expense tile for the next item, and the corresponding expense form will open. Continue adding expenses until the bill has been fully itemized and the **Remaining** amount equals zero.

DATE	EXPENSE	SPENT	PAY ME
Fri 09/06/2019	Itemization	632.84 USD	125.67
Fri 09/06/2019	Office Supplies	125.67 USD	125.67

Once all expenses have been itemized, the Add Itemization window will disappear and all the itemized expenses will now appear on your report.



CHROME RIVER USER MANUAL

DATE	EXPENSE	SPENT	PAY ME	
Wed 09/04/2019	Itemization	632.84 USD	632.84	✓
Wed 09/04/2019	Office Supplies	125.67 USD	125.67	✓
Wed 09/04/2019	Lab Supplies	358.92 USD	358.92	✓
Wed 09/04/2019	Hazardous Materials	148.25 USD	148.25	✓

Cash Advance

All requests for cash advances must be requested and approved through a Chrome River Pre-Approval Report. (See [Creating a Pre-Approval Report.](#))

Additionally, any approved cash advances must be cleared on an Expense Report within sixty days of completion of the trip or event, and any excess funds must be returned to the Cashier's Office prior to clearing the advance. (See [Cash Advance Return.](#))

After creating an expense report and adding all appropriate expenses to it, you will also need to add the cash advance expense to account for the amount already received. After being approved to receive a cash advance through submitting a Pre-Approval report, the cash advance will show in your **eWallet** under **Cash Advance**. To add it to your expense report, select the checkbox on the cash advance line and click **Add** in the top right corner.

The screenshot shows the 'Add Expenses' screen. On the left is a sidebar with categories: 'eWallet' (All, PCard, Offline, **Cash Advance**, Recycle Bin) and 'eReceipts' (Receipt Gallery). The 'Cash Advance' category is selected. The main area shows a list of expenses. One entry is visible: 'Cash Advance' dated 06/25/2019 for -254.00 USD. A checkbox next to this entry is checked. In the top right corner, there is a 'Delete' button and an 'Add' button. Yellow arrows point to the 'Add' button, the checkbox, and the 'Cash Advance' category in the sidebar.



CHROME RIVER USER MANUAL

A cash advance Expense Form will now display. The **Transaction Date** and **Spent** amount will automatically default in. Confirm that a **Business Purpose** has been entered, and click **Save** in the top right corner.

The screenshot shows a web form titled "Cash Advance" with a "Cancel" button and a "Save" button in the top right corner. The form contains the following fields:

- Transaction Date:** 06/25/2019 (with a calendar icon)
- Spent:** -254.00 USD
- Business Purpose:** Researching spiders in Peru
- Description (Optional):** Cash Advance
- Merchant (Optional):** (empty field)

This will add the cash advance to your expense report and reduce the **Total Pay Me Amount** by the amount of the advance.

If the Total Pay Me Amount is $< \$0$, this means funds are owed to the University, and you should follow the Cash Advance Return process described below.

If the Total Pay Me Amount equals $\$0$, the advance has successfully been cleared.

If the Total Pay Me Amount $> \$0$, the payee spent more than the initial cash advance received, and this amount reflects the total due to be paid by the University.

Cash Advance Return

In the event that you did not spend the entirety of the advance, University policy requires that the unused funds must be returned to the Cashier's Office. To do so, complete the Deposit Form (available from the [Cashier's Office website](#)) with the following values [Note: the appropriate Index/Fund and Account values have changed]:

- **Description** – Enter the first and last name of the person who received the advance
- **Amount** – Enter the amount being returned to the University
- **Index/Fund** – Enter 10000 [This is a change]
- **Account** – Enter 1444 [This is a change]
- **Type** – Select **General Revenue**
- **Preparer Name, Department, Campus Phone, Email** – Enter as appropriate



CHROME RIVER USER MANUAL

UNIVERSITY OF RICHMOND

Cashiers' Cash & Checks Deposit Form Receipt # _____ Date 12/09/19

Check # (If Applicable)	Payer Name	Description (30 Characters)	Amount	Index/ Fund	Account	Type
		WebstUR Spider	\$ 52.00	10000	1444	General Revenue
			Total Deposit \$ 52.00			
			Total Checks \$ -			
			Total Cash \$ 52.00			

Special Instructions/Notes

WebstUR Spider Athletics x5555 urispider@richmond.edu
 Preparer Name Department Campus Phone Email

Complete the form and attach supporting documentation and the cash/checks being deposited. Submit two copies in person to the Cashiers' Office located in Qually Center. Do not send any deposits via campus mail. Retain a copy for your records.

Print two copies of the completed form and take to the Cashier's Office, along with a check or cash to be deposited. The Cashier's Office will keep one copy of the Form and you will receive a cash deposit receipt.

Additionally, you will need to add a **Cash Advance Return** expense to your expense report in Chrome River. After you have added all other expenses on your report, manually add a Cash Advance Return record by clicking **Create New -> Cash Advance Return** in the Add Expenses window.

This will display the Cash Advance Return Expense Form. Enter the value of the cash advance that was returned to the Cashier's Office in the **Spent** field. Additionally, you will be asked to click the checkbox certifying that unused funds have been returned to the Cashier's Office and you have attached a copy of the cash deposit receipt to the report. (You can attach the receipt in the **Attachments** section at the bottom of this Expense Form.) Click **Save** to add the Cash Advance Return to your report.



Transaction Date: 09/01/2019

In the Spent field below, input the value of the Cash Advance which was returned

Spent: 52.00 USD

Business Purpose: returning travel advance balance from conference

Description (Optional):

I certify that I have returned unused funds to the Cashier's office. A copy of the cash deposit receipt is attached to this expense report.

The **Total Pay Me Amount** for your report should now be \$0.

Memorized Expenses

If you have expenses that are frequently used on a monthly basis (e.g., your office has water delivered every month), you may “memorize” that line item and have it created as a permanent transaction in your eWallet for future use.

After you have created and allocated the line item you wish to memorize, tap the **•••** in the top right corner and select **Memorize Expense**. You will be asked to confirm you would like to add this as a memorized expense. Click **OK**.

Edit Delete ...

Images

Memorize Expense

Duplicate

Spent: 52.25 USD

Business Purpose: Diamond Springs office water delivery

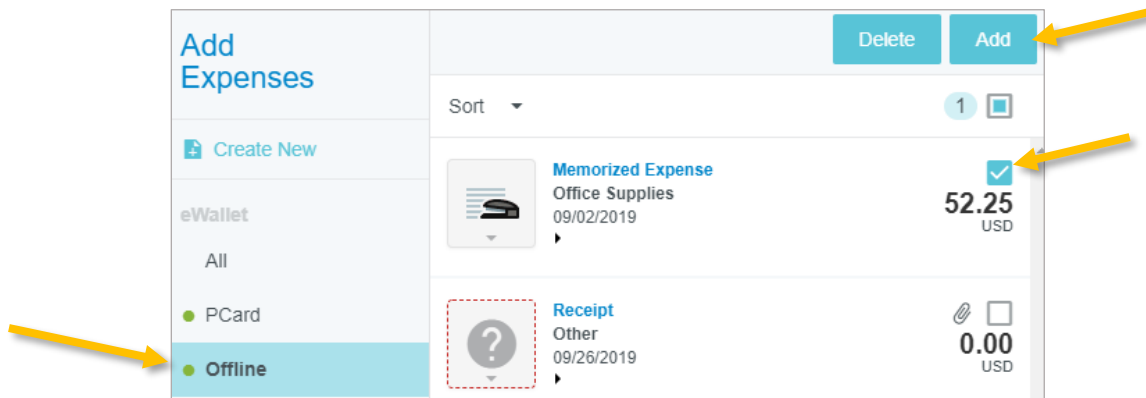
Description:

Merchant: Diamond Springs



CHROME RIVER USER MANUAL

The next time you create a report that contains this expense, you will find it listed under **Offline** in your eWallet. Find the memorized expense, tap the checkbox to select it and click **Add** in the top right corner to add it to your report.

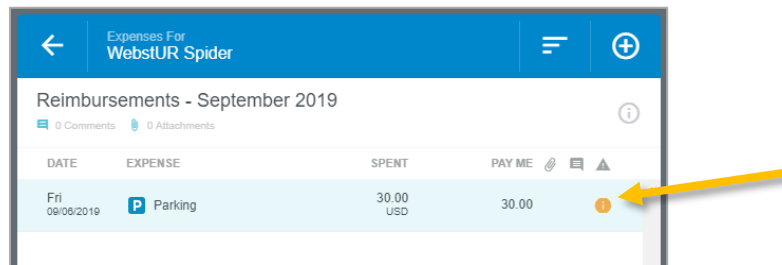


The expense form will now open for the memorized expense and allow you to make any necessary adjustments (such as adjusting the transaction date or attaching a new receipt) and save the line item onto the new report.

The original memorized expense will remain in the eWallet for future use.

Compliance Warnings

A compliance warning indicates that additional information is required before an expense can be submitted for approval and processing. Compliance warnings may be encountered when saving a line item or when submitting an entire expense report for approval. Any line items in an expense report with a compliance warning will be noted with the yellow circle icon in the report summary to the left.



Respond to the warning by either modifying the data (if there is an error) or replying to explain the warning. To reply to the warning, click into the **Add** response area under the message and enter your reply. Tap **Post** to update and close the compliance warning message.



CHROME RIVER USER MANUAL

P Parking

Receipt required for this expense #201

Please attach receipt, or, if that's not possible, please ensure that all fields below are entered accurately and provide an explanation for why you were not able to attach a receipt.

The parking payment machine did not print out a receipt. Sorry!

[Cancel](#) [Post](#)

Compliance Violations

A compliance violation indicates that the expense cannot be submitted for approval and payment based on University of Richmond policies. A compliance violation may be encountered when saving a line item or submitting an entire expense report for approval.

Fuel

Fuel on Personal Vehicle is not allowed #266

For travel in a personal vehicle, only mileage should be reported. Please remove this fuel expense and enter a mileage expense instead.

Any line items in an expense report with compliance violations will be noted with the red triangle icon in the report summary to the left. Additionally, unresolved compliance violations will result in the **Submit** button being deactivated. You will be required to make any necessary changes as specified in the warning before you can submit the report.

Reimbursements - September 2019

0 Comments 1 Attachments

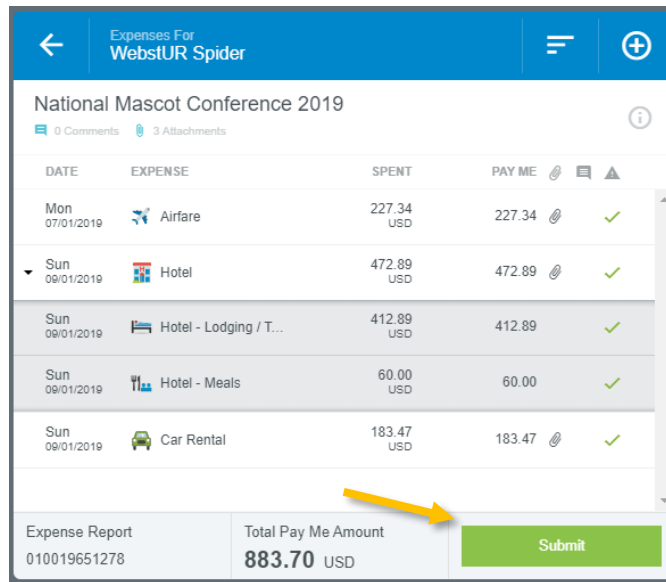
DATE	EXPENSE	SPENT	PAY ME	
Thu 09/05/2019	Fuel	28.79 USD	28.79	

Expense Report PR0019598339 Total Pay Me Amount **28.79** USD [Submit](#)

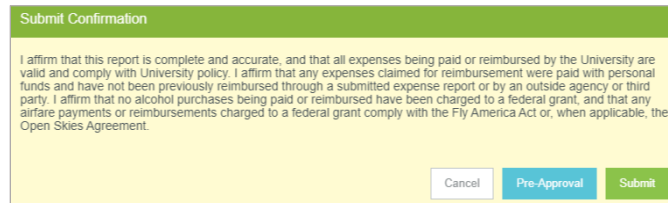


Submitting a Report

Once you have added all of your expenses, attached all appropriate receipts, and resolved or responded to any compliance warnings or violations, you are now ready to submit your report. To do so, click on the green **Submit** button at the bottom of the report summary.



A submit confirmation will appear at the top right of the screen. Click **Cancel** to return to the report and make any changes. Click **Pre-Approval** to attach a previously submitted pre-approval report to your expense report for informational purposes. Click **Submit** to submit the expense report to the approval workflow.



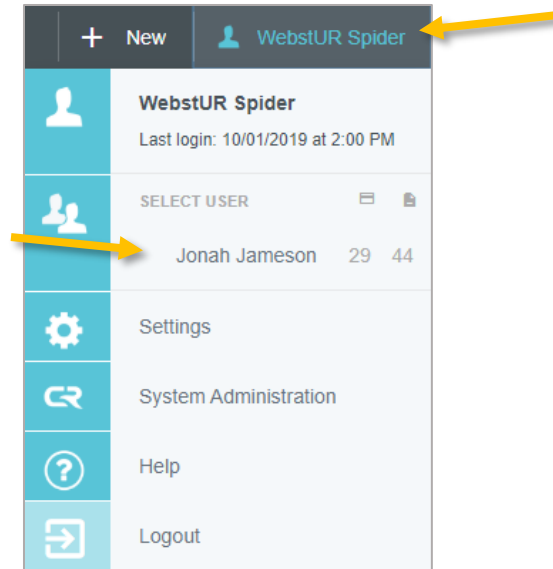
Creating an Expense Report as a Delegate

If you are creating a report for someone other than yourself, you will need to be set up as a delegate of the user. For more information on setting up a delegate, see [Add a Delegate](#).

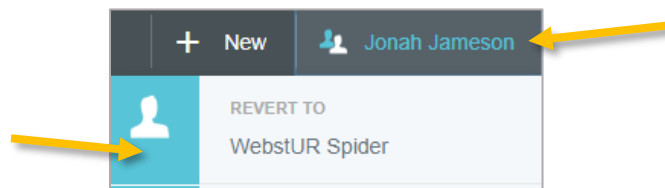
When you have been authorized to work as another's delegate, you will need to switch over to their account in order to create the report. To do so, click on the **User Icon** in the top right corner of the Navigation Bar (with your name) and you will see a list of users for whom you're authorized to serve as a delegate. The numbers to the right of their name will show the number of unused expense transactions (including PCard charges, submitted receipts, cash advances, and approved pre-approvals) as well as the total number of unsubmitted reports. Clicking on their name will take you into their account where you can now create a report as explained in the previous sections.



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Once you are done, you can return to your account by tapping the User Icon again and selecting your name.



Submitting and Managing Receipts

Expense owners and delegates have a few different options for uploading receipts to Chrome River for reports. Each are detailed below.

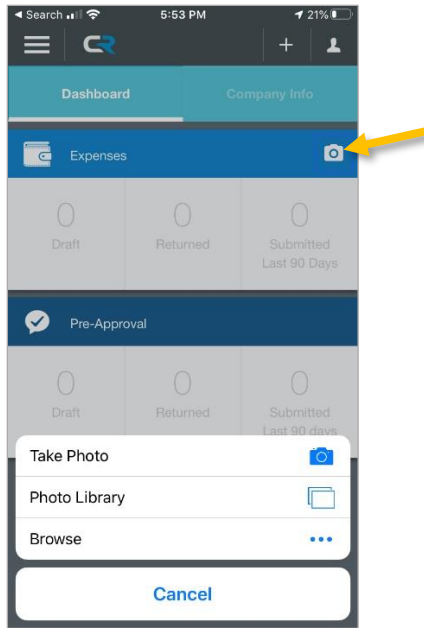
Uploading Receipts Using App

Chrome River offers two free apps (Chrome River and Chrome River SNAP) that allow users to capture and upload receipt images right when the expense occurs. For more information about downloading and installing the apps, see [Download the Chrome River or Chrome River SNAP Apps for iOS or Android](#).

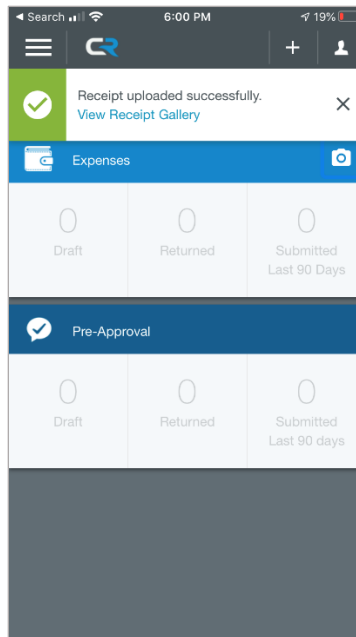
Uploading a receipt in the apps is simple. If using the Chrome River app, click on the small camera icon at the top of the Expenses heading. This will open a menu at the bottom of your screen giving the option to take a photo or to select a previously captured photo from your phone's photo library.



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After taking a photo or selecting one from your photo library, the photo should be uploaded to Chrome River automatically. You will receive a message at the top of the screen confirming that the receipt was uploaded successfully to your Receipt Gallery.



Note: Photos taken with the Chrome River app are not stored in device's photo gallery, so they do not take up storage space. However, it is important to verify that the photo has been uploaded successfully and legibly in your profile before discarding any receipts.

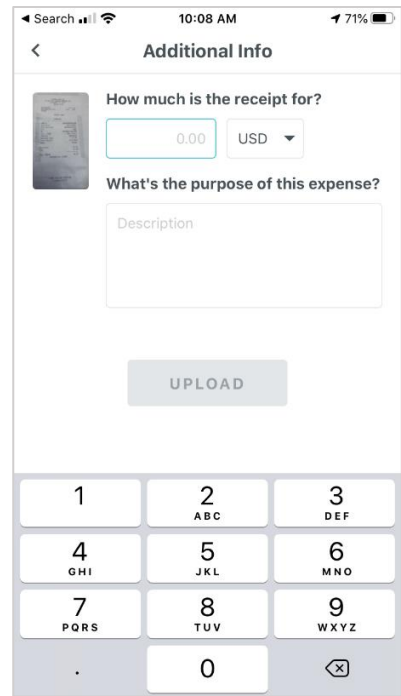


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If using Chrome River SNAP, opening the app will take you straight into camera mode. Hold your mobile device over the receipt and tap the gray circle at the bottom of the screen to take a photo. You can toggle the flash from on, off, or to Auto mode with the flash icon in the top right corner.



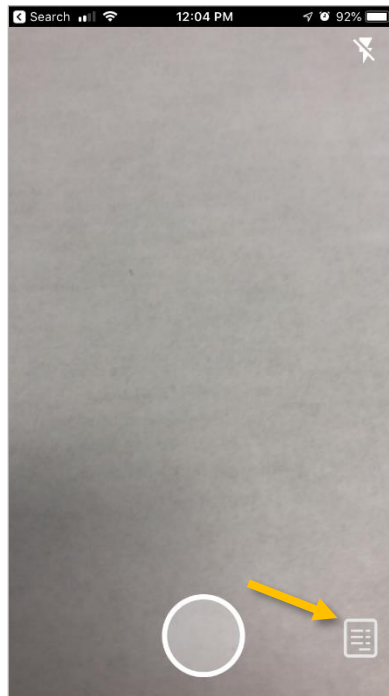
Once you have taken the photo, check to confirm the receipt is fully in frame and in focus. If you need to retake the photo, click **Discard** and try again. You have the option to enter a description, amount, and select a currency for the receipt by clicking the **Add more information** link under the receipt. After confirming the receipt is legible and, if desired, adding any additional information, click **Upload** to submit.



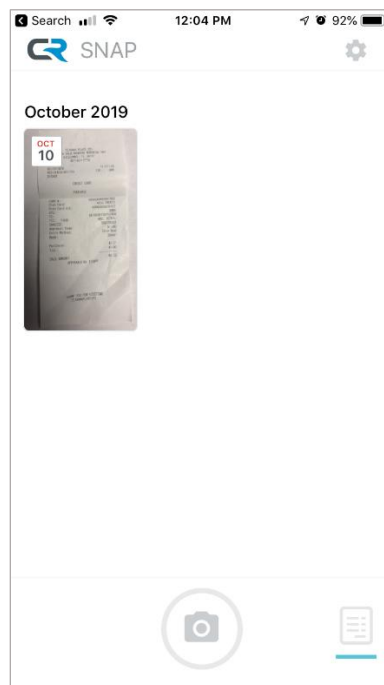


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Once you have uploaded the receipt, you will be returned to the camera view. To see the receipt as it is being prepared for upload, tap the receipt icon in the lower right corner.



This screen reflects your upload history, showing all receipts you have previously uploaded. If you have selected “Delete Receipts After Upload” in Settings (the gear icon in the top right corner), the receipt will only appear here until it has uploaded to Chrome River.





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If a connectivity issue causes the upload to fail, you will receive a message on this screening indicating “Uploading failed” with a red icon with an explanation point appearing on the impacted image. Tap the image thumbnail of the receipt or the word **Retry** to resend the receipt image.

Note: Photos taken with Chrome River SNAP are not stored in device’s photo gallery, so they do not take up storage space. However, it is important to verify that the photo has been uploaded successfully and legibly in your profile before discarding any receipts.

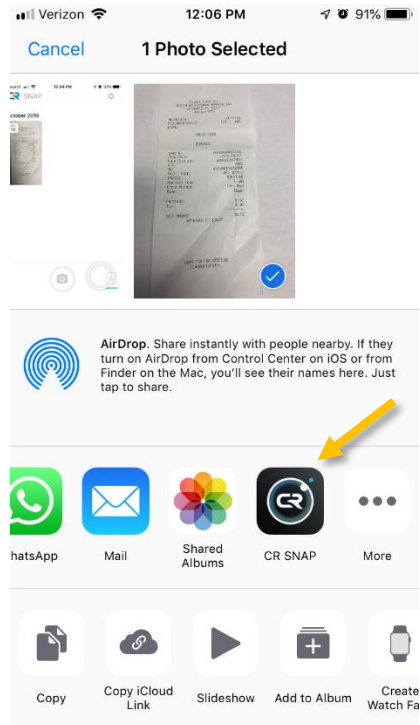
If you took a photo with the camera app on your phone, you can still upload the photo using SNAP. Simply find the image in your photo gallery and tap the **Share** icon.



Select the **Chrome River SNAP** icon.



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This will open the photo in the SNAP app and will present you with the same options. If the image is fully in frame and in focus, click **Upload** and the image will be uploaded directly to your Chrome River Receipt gallery the same as if it has been captured directly in the app.

If there are multiple receipts in one photo, the system will split them into separate transactions.

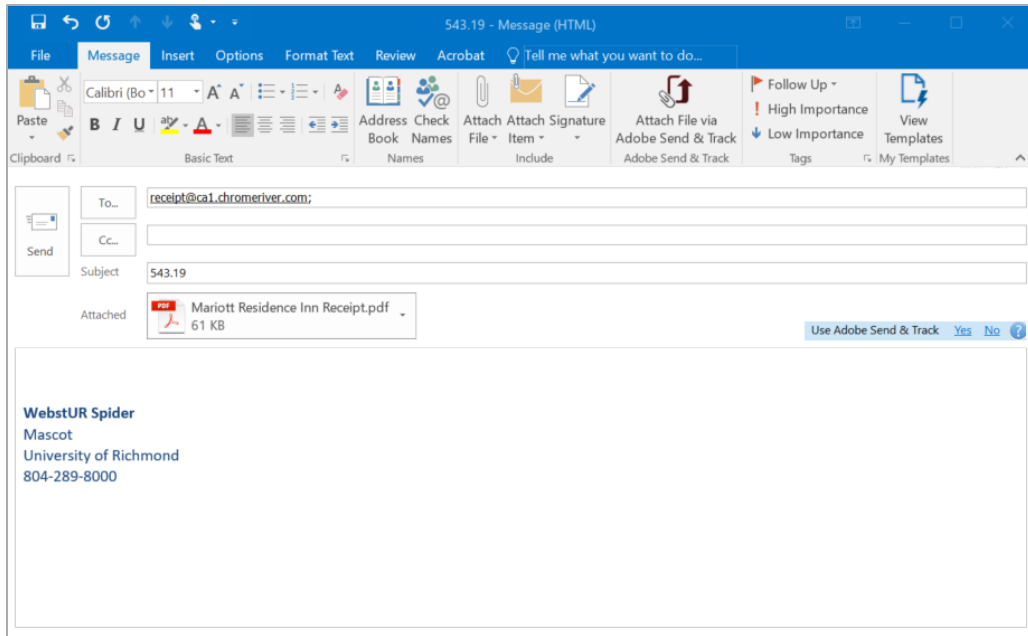
[Emailing to Receipt Gallery](#)

To email a receipt to your Receipt Gallery, simply attach the images or files to an email message, and send the message to receipt@ca1.chromeriver.com. If you are sending the message from a non-UR email address (e.g., you are forwarding a receipt that was sent to your personal email), ensure that you have set up the email as an Alternative Email in your Personal Settings. For more information, see [Add an Alternate Email](#).

If you are serving as a delegate for another user and need to submit a receipt for that user, you will need to enter the expense owner's email address in the subject line of the email in order to have it show up in their Receipt Gallery and eWallet.

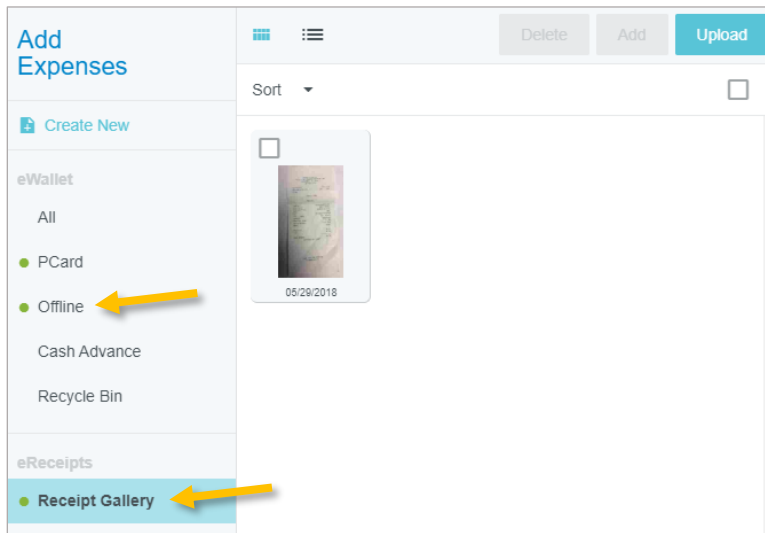


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Note that if you enter the expense amount in the subject line of the email, that amount will populate in the **Spent** field for the expense in Chrome River. Additionally, you can enter a description of the receipt in the body of the email, and it will be added to the **Description** field.

The images will appear in the Receipt Gallery and the Offline section of the eWallet.



Each image will appear as its own item, complete with the corresponding information about the expense. If you attach a multipage PDF containing only images, each image will be created as a separate expense item. If the multipage PDF contains text, a single item will be created.

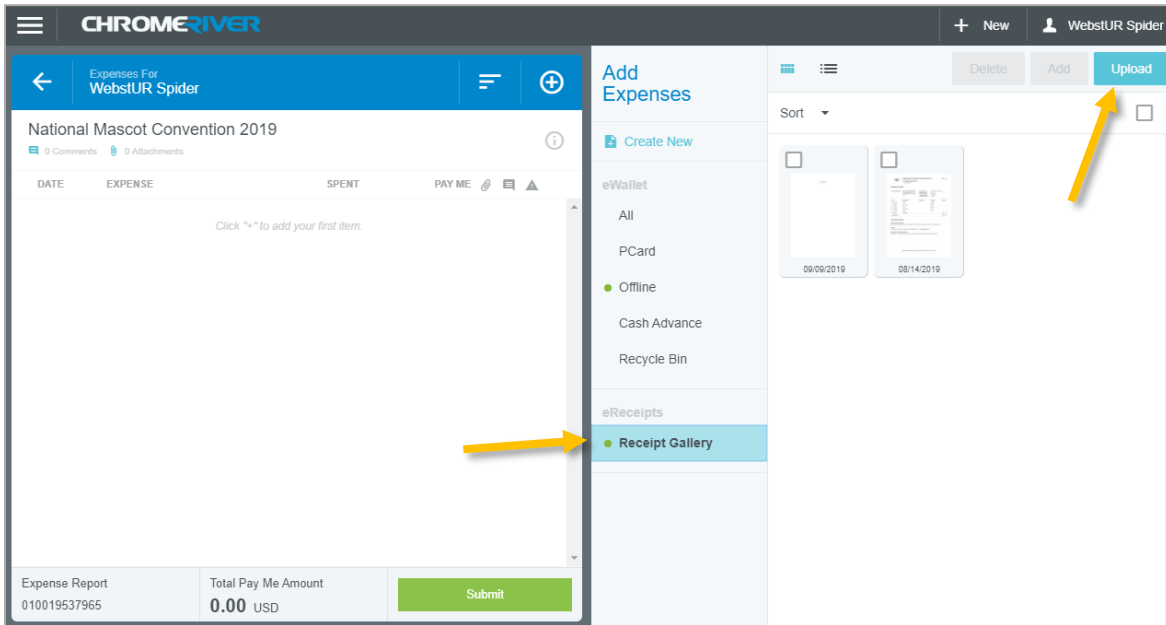


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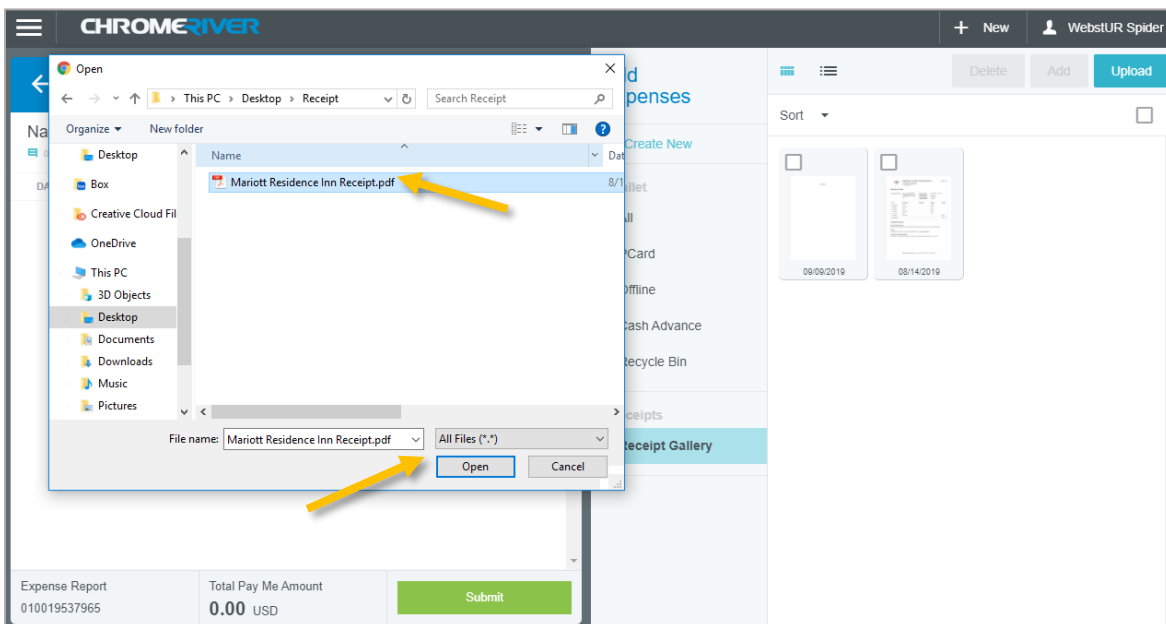
Upload from Computer

In some cases, you may have a scanned or digital receipt saved to your computer. You may upload these receipts to your Receipt Gallery or directly to the expense line.

To upload to the Receipt Gallery, select the **Receipt Gallery** and click the **Upload** button in the top right corner.



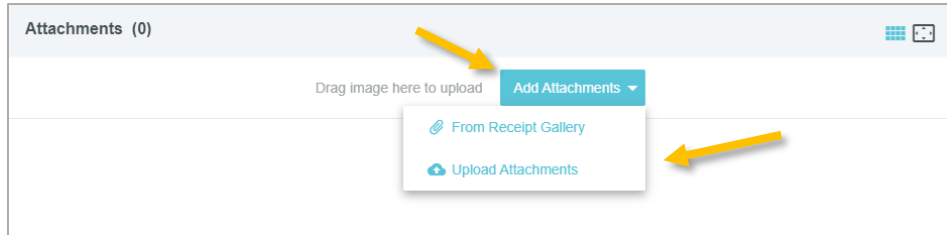
Navigate to the file on your computer and click **Open**. The receipt will now appear in your Receipt Gallery with the upload date.





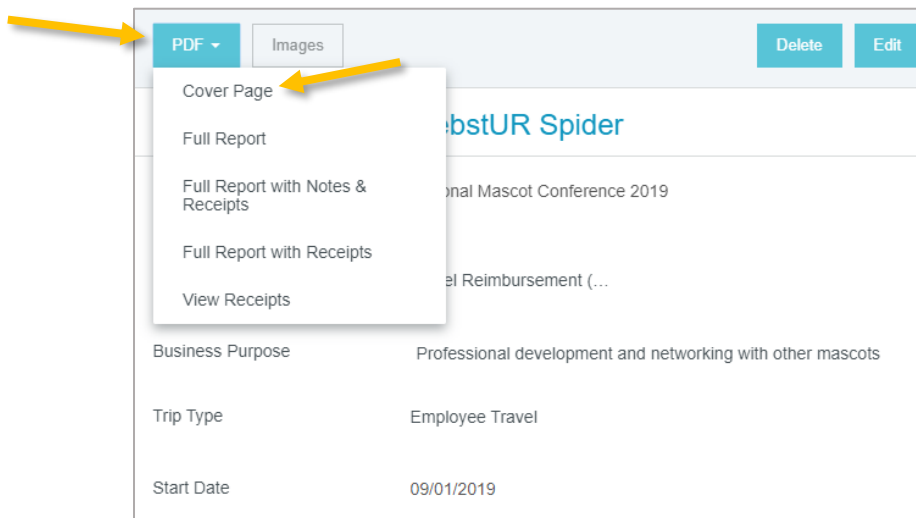
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To upload directly to an expense item, open up the expense form for the appropriate item. Scroll to the bottom to find the **Attachments** section. From here, you can either drag the receipt directly from your desktop to this section or click the **Add Attachments** button and select **Upload Attachments**. Navigate to the file on your computer and click **Open**. The receipt is now attached to the expense line.



Scan to an Expense Report


You may also scan a receipt or batch of receipts to a specific expense report. To do so, click the **PDF** button in the preview of the expense report to which you want to attach images and select **Cover Page**.



A new window containing the cover page will open. Print the cover page, and then scan the cover page with the images you wish to attach to expense@ca1.chromeriver.com. The unique barcode on the Cover Page will attach the receipts to the correct report. (Note: You will still need to attach the receipts to the appropriate expense items within the report.)



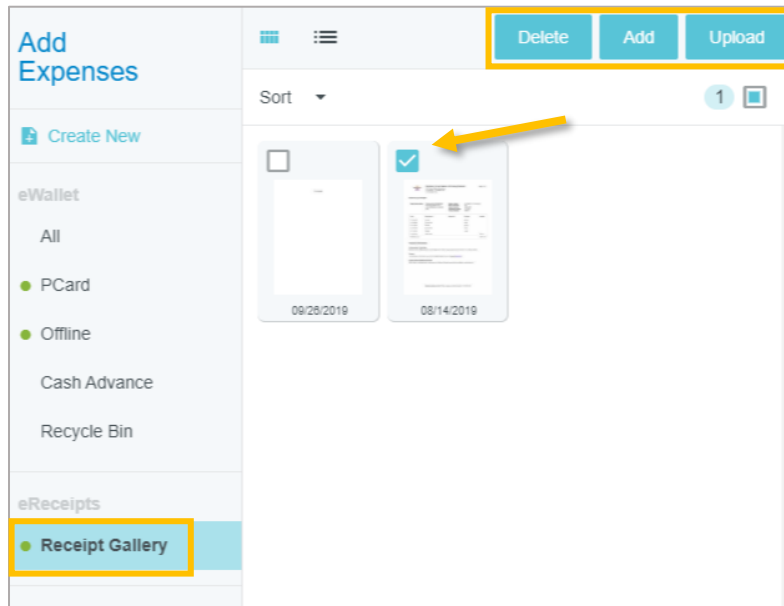
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Expense Report		Report ID: 0100-1953-6728	
Report Name	National Mascot Conference 2019		
Expense Owner	WebstUR Spider		
Expense Owner ID	dengels / 53344799		
Created By	WebstUR Spider		
Date	Sep 24, 2019		
To Be Paid In	USD		
BusinessPurpose	Professional development and networking with other		
ReportType	Travel Reimbursement (not to a student)		
TravelTripType	Employee Travel		
StreetLine1			
StreetLine2			
StreetLine3			
City			
State			
ZipCode			
Country			
StartDateExtra	Sep 1, 2019		
EndDateExtra	Sep 4, 2019		
DomInternational	Domestic		
CityStateZip	Orlando, FL		
Please place this cover sheet in front of hardcopy receipt pages and then scan or fax to: Email: expense@ca1.chromeriver.com Fax: (888) 323-1591			
Financial Summary			
		Amount (USD)	
Total Expenses Reported		518.66	
Amount Due Expense Owner		518.66	

Receipt Gallery

The Receipt Gallery contains all receipt images uploaded directly to Chrome River by email, scan or the Chrome River Snap app.

To add a receipt from the Receipt Gallery to a report, click the **checkbox** for that item and click **Add**. To delete a receipt from the Receipt Gallery, click the checkbox for that item and click **Delete**. To upload additional receipts to the Receipt Gallery from your computer, click the **Upload** button, navigate to the file location where the receipt is stored, select the file and click **Open**.





Receipt Capture Tips

For a better experience with submitting receipts, consider the following tips:

- Place receipt on a white background
- When photographing multiple receipts, orient them all in the same direction
- Leave a gap of at least 1.5 inches between receipts
- Make sure no other objects are visible in the photo
- Do not use flash
- If given an option to select the image size, select the size closest to 500 KB

Merging Transactions in eWallet

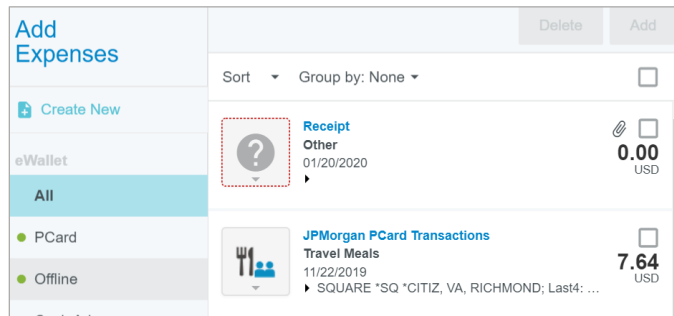
If a forwarded receipt duplicates a credit card transaction or other travel data already imported into Chrome River, the system will automatically merge them. The following conditions must be met in order for an automerge to occur:

- Expense types match
- Dates are within two days of each other
- Amounts are within 25% of each other

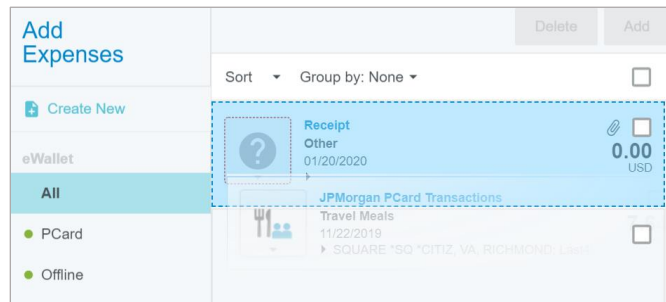
However, you may also manually merge transactions of any type, amount, or date, subject only to the following restrictions:

- A credit card transaction may never be merged with another credit card transaction
- An uploaded or emailed hotel folio receipt may never be merged with another hotel folio receipt

To manually merge transactions, navigate to your **eWallet** and click **ALL** to view all transactions. Identify the transactions you want to merge.



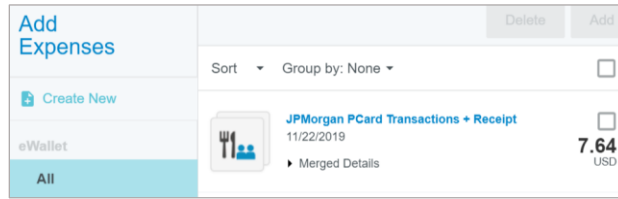
Drag one transaction onto the other.



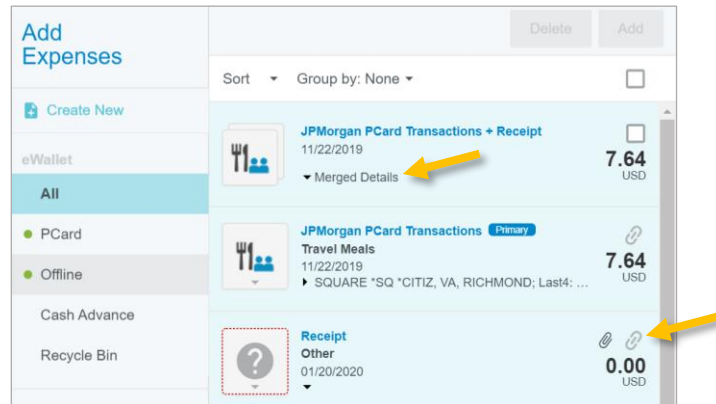


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This will create a single, new merged transaction. This merged transaction can now be added to a report.

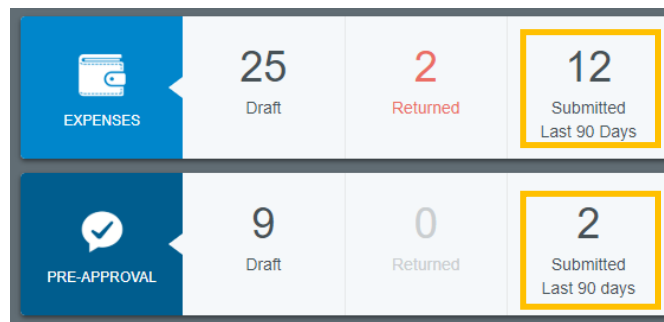


To see the individual items under the merged transaction, click Merged Details. To unlink a transaction from a merged transaction, click the link icon.



Report Tracking

Users can track the current status of any previously submitted pre-approval or expense reports at any time. From the Dashboard, select the **Submitted** Report link.



From the list of submitted reports, click on the desired expense report to preview it. Then tap **Tracking** in the preview. (On mobile, tap the expense report to open the preview, and tap the **•••** button and click **Tracking** from the drop-down list.)



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Submitted Expense Reports			Open	PDF	Tracking	Recall
Reimbursements - September 2019 010019560840	09/26/2019	115.22 USD PENDING	Reimbursements - September 2019			
Reimbursement of student employee 010019572970	09/20/2019	790.00 USD EXPORTED	Report Owner	WebstUR Spider		
Reimbursements - September 2019 010019572904	09/20/2019	190.00 USD EXPORTED	Submit Date	09/26/2019		
Web spinning research trip 010019572301	09/20/2019	1,582.00 USD EXPORTED	Expense Report ID	010019560840		
			Business Purpose	Purchased miscellaneous supplies for an event Parking for a planning meeting downtown		

You will now see a list of every item on the report and its status. (For Hotel or Itemized expenses, tap the arrow on the left to view the status of each itemized item.) The following are the possible statuses:

- **Pending:** Expense has been submitted and is awaiting approval
- **Returned:** Approver has sent the expense back to the expense owner for adjustment
- **Approved:** Expense has been approved but has not yet been exported
- **Exported:** Approved expense report has been exported to Banner and OnBase

Tap an expense item to see where it is in the approval process, including the approver to whom it is currently assigned, the date, and the system rule that triggered the assignment. Tapping each circle under **Routing Steps** will show you complete details for that step.

EXPENSE TYPE	AMOUNT (USD)	STATUS	CURRENTLY ASSIGNED	Routing Status
Office Supplies	87.22	Pending Approval	Jonah Jameson	Pending
Parking	28.00	Pending Approval	Jonah Jameson	

Routing Steps	
Step Number	2
Assigned To	Jonah Jameson
Assigned To	Jonah Jameson
Assigned Date	09/26/2019 11:28 AM
Step Status	Assigned
Routing Rule	102000 - Expense Owner's Boss

Note: You may find that the routing steps include GateKeeper or Auto Approve. GateKeeper is a holding step that ensures all expense lines on the report are approved before moving forward to the next approval step. Auto Approve will show for any future GateKeeper steps. These steps automatically complete as soon as all expense lines have completed the prior approval step.

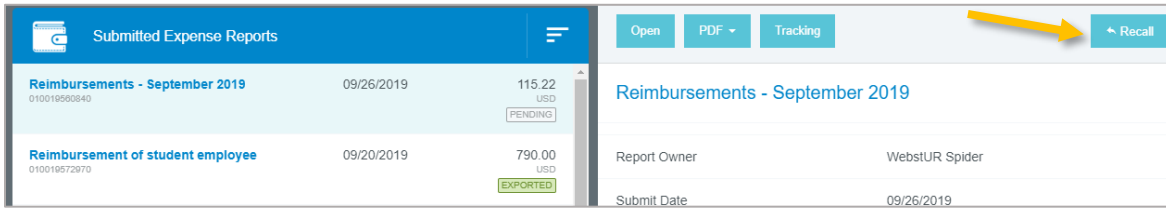
Recall a Report

Recalling a report allows expense owners and their delegates to return any expense report to Draft status as long as none of the line items have been fully approved. All line items must be in Pending approval status in order to recall an expense report.

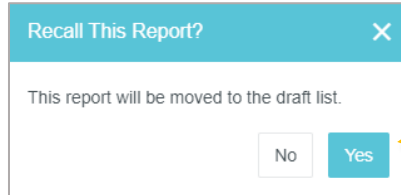
In the submitted expense reports list, tap **Recall** in the preview.



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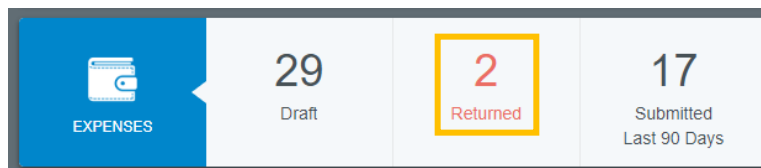
You will be asked to verify that you wish to send the report back to the Draft Expense Reports list. Tap **Yes**.



The report will now appear in your Draft Expense Reports list, and you may make any necessary updates or changes. When the report is resubmitted, any approvers who participated in partial approval of the original expense report will need to reapprove.

Returned Reports

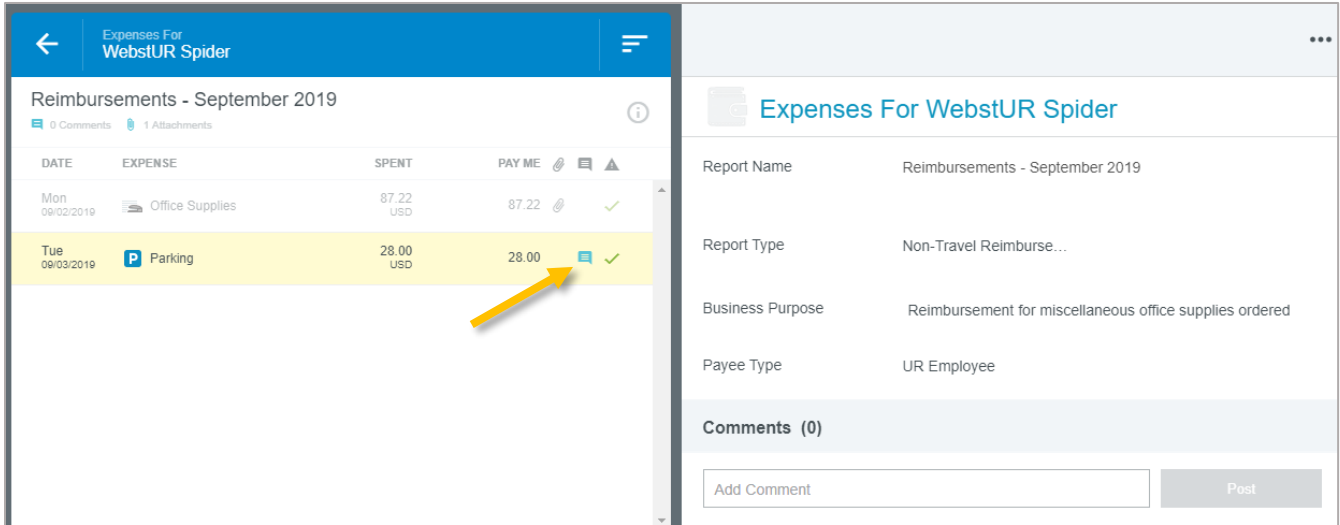
Sometimes an approver will return one or more line items on an expense report to the expense owner during the approval process. The report will appear in the **Returned** Expense Reports block on your dashboard. Additionally, you should receive email notification informing you that an expense item has been returned along with a summary and explanation why.



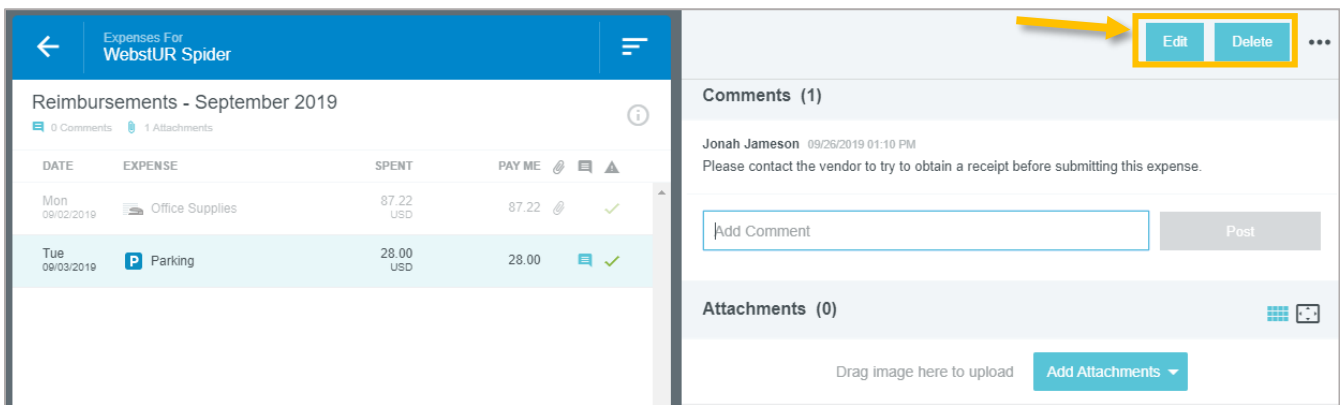
Double click on the returned report to open it. The returned line item(s) will be highlighted in light yellow. Any header-level approver notes that apply to the entire report can be accessed by clicking the Comments link in the header. If the approver left a note on a specific line item, it will be indicated by a blue note icon.



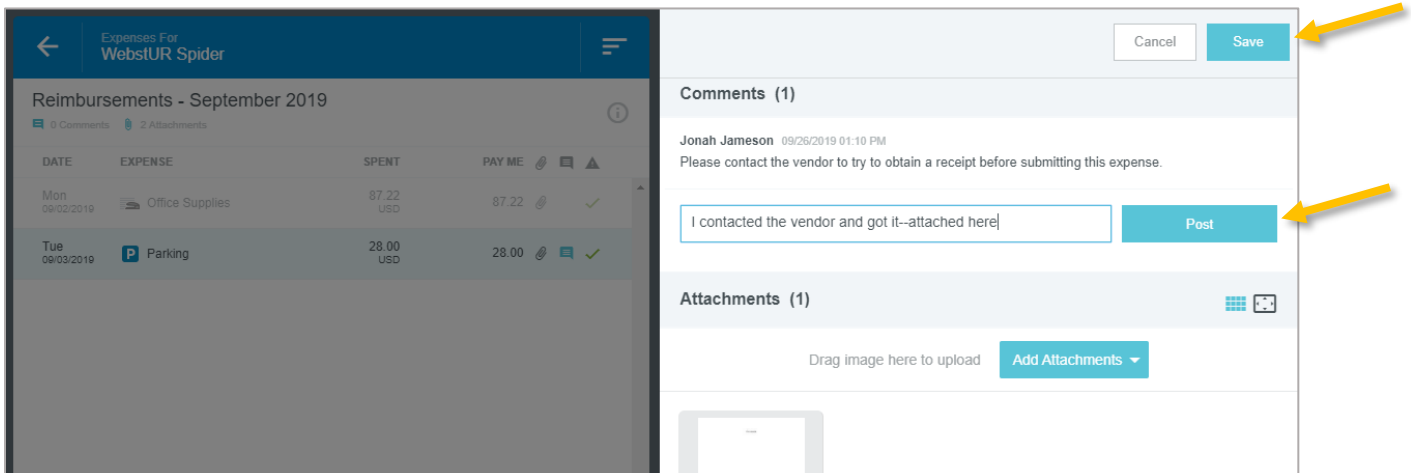
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Only returned line items can be edited. Click on the returned line item and then tap **Edit** in the preview. If the approver has asked you to remove an expense, click **Delete** in the expense item's preview or inside the line item to remove it.



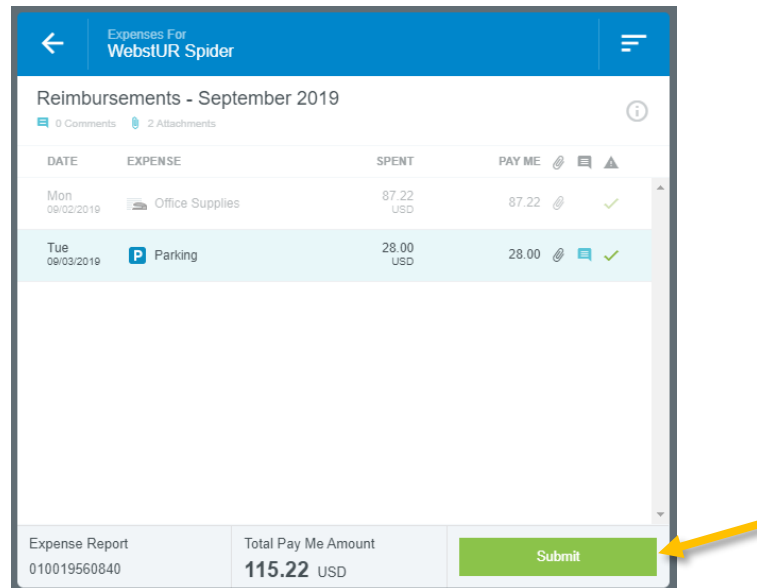
View the **Comments** from the approver to see why the expense was returned. You may reply to comments via the box below. Tap **Post** to add it to the report. Make any necessary changes to the line item and click **Save**.



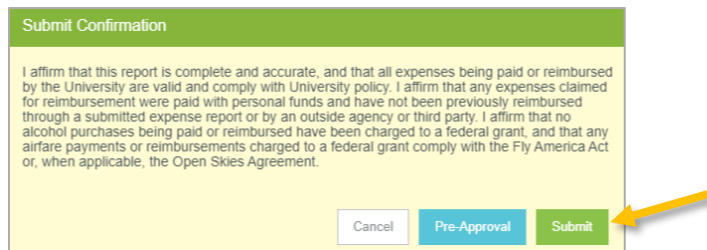


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When all changes have been made, click **Submit** to resubmit the line item(s) for approval.



In the Submit Confirmation window, click **Submit**.



Approvals

Chrome River will automatically route reports to the appropriate approvers based on system rules and assignments. Approvers will receive an email notification informing them when they have a pre-approval or expense report in their queue for approval. Approvers have several options for approving the report.

Approval via Email

Chrome River will email approvers expense reports requiring their approval. Approvers have the ability to **approve all** expenses on the report for payment or **return all** expenses on the report to the expense owner with questions or comments from within the email. Approving or returning only specific line items within a report requires the approver to log in to the Chrome River application, which can be done through the link at the bottom of the email.

The email approvers receive includes most of the details of the report, including the ability to view receipts associated with each expense. At the bottom of the email, approvers can view an expense summary and will also see **ACCEPT** and **RETURN** buttons.



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Note that at the bottom of the report you can click the **VIEW RECEIPTS** link to view a PDF of all receipts attached to the report.

ACTION REQUIRED		Chrome River
Expense Report for	WebstUR Spider [Mascot]	
Report Name	Reimbursements - September 2019	
Submit Date	09/26/2019	
Expense Dates	09/02/2019 - 09/03/2019	
Total Expenses	115.22 USD	
Business Purpose	Reimbursement for miscellaneous office supplies ordered	
Payee Type	UR Employee	
Report Type	Non-Travel Reimbursement or Refund (not to a current student)	
Account Summary		
23456	School Spirit	115.22
Expense Details		
09/02/2019	Office Supplies 23456	87.22 USD
Business Purpose: Purchased miscellaneous supplies for an event		
Merchant: [Redacted]		
Reason Assigned: Route to Expense Owner's Supervisor		
Receipts View		
response: I think this is... 28.00		
Financial Summary		
		Amount (USD)
Total Expense Report		115.22
Less Company Paid		0.00
Amount Due Employee		115.22
<div style="display: flex; justify-content: space-around; margin-top: 10px;"> <div style="border: 2px solid orange; padding: 5px; background-color: green; color: white; font-weight: bold;">ACCEPT</div> <div style="border: 2px solid orange; padding: 5px; background-color: red; color: white; font-weight: bold;">RETURN</div> </div>		
View Receipts Report ID: 0100-1956-0840		
To take action on these expenses, take either of the following steps: - Click on the ACCEPT or RETURN button as appropriate and add any comments to the new email that opens, - OR FORWARD this email to approve@expense.ca1.chromeriver.com or return@expense.ca1.chromeriver.com with any comments at the top of the forwarded message.		
To view this expense report or access the Chrome River application, click here .		

To view a receipt for a line item, click the **View** button next to the Receipts line.

Expense Details	
09/02/2019	Office Supplies 23456
	School Spirit
Business Purpose: Purchased miscellaneous supplies for an event	
Merchant: [Redacted]	
Reason Assigned: Route to Expense Owner's Supervisor	
Receipts View	

Any compliance issues for line items will be noted with a Compliance Warning flag, as well as an explanation of the compliance issue and a response from the expense owner.

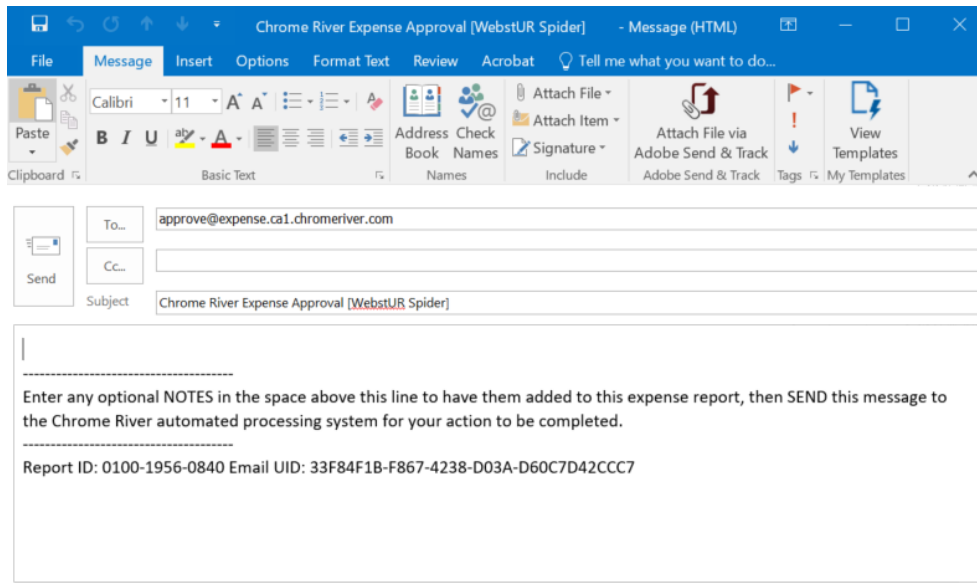
09/03/2019	Parking 23456	28.00 USD
Business Purpose: Parking for a planning meeting downtown		
Trip Type: GeneralTravel		
Merchant: [Redacted]		
Reason Assigned: Route to Expense Owner's Supervisor		
!! Compliance Warning !!		
Parking: Receipt required for this expense		
Response: I think that I lost it. Sorry!		

To approve a report by email, click the **ACCEPT** button. This will bring up a new email window that you will need to **SEND**. If you have any comments you would like to include on the report, you can type them into the body of the email

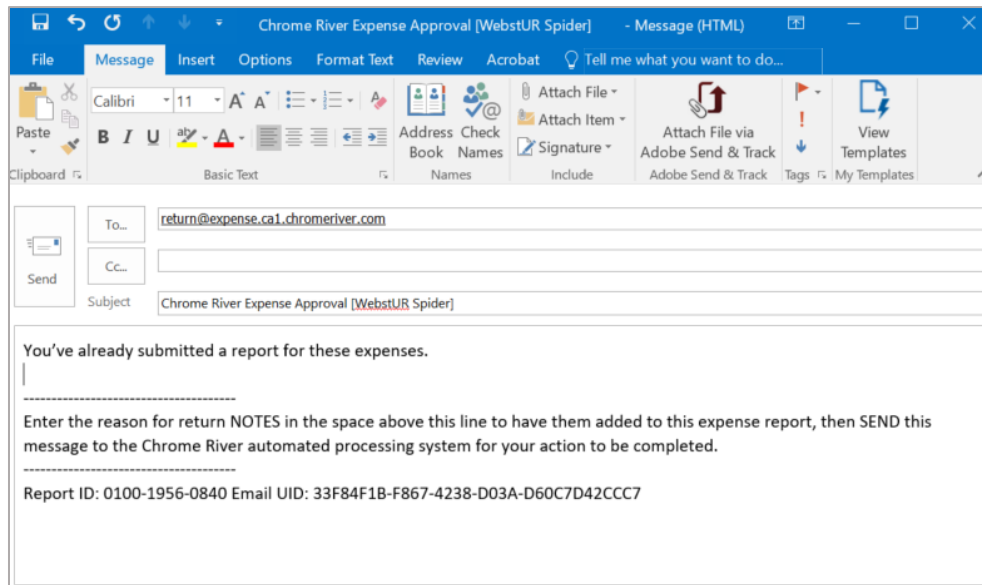


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before sending, and they will be added to the report. (This is optional.) Once you hit send, the system will be notified of your approval, and the report will move forward in the approval queue.



To return the report, click the **RETURN** button. This will also bring up a new email window that you will need to **SEND**. You can enter an explanation for why you are returning the report that will be provided to the report submitter. Once you hit send, the system will return the report to the submitter for corrections. If an approver returns a report, the resubmitted report will route back to the same approver and will not require additional approval from previous approvers, if applicable.



While approvers can return a report from within the email, they cannot adjust a report from within the email. Instead, they must do so from within the Chrome River application, which is accessible from the link at the bottom of the email.

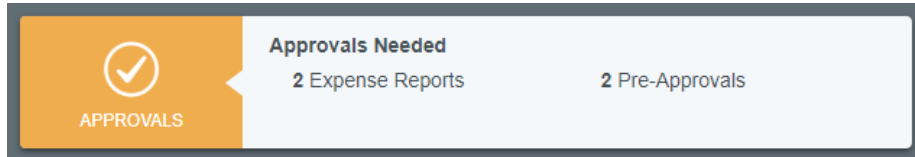


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Note: If you attempt to approve via email an expense that has since been changed (e.g., the expense owner has recalled or resubmitted the report) you will receive an Expense Approval Failure Notification email alerting you to reattempt your approval via the most recent approval email for that report.

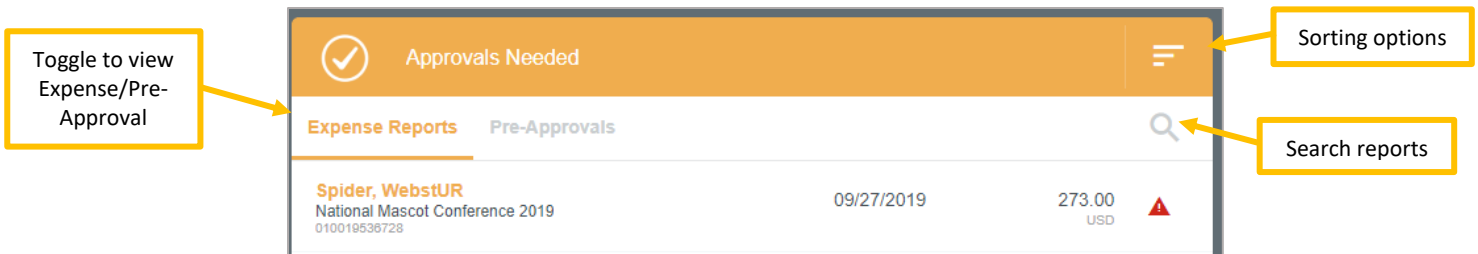
Approval in Chrome River Application

After logging into Chrome River, any approvers with reports pending approval will show up in the yellow box in their Dashboard. This box will display a count of the number of expense and/or pre-approval reports awaiting approval. Click on either **Expense Reports** or **Pre-Approvals** to access the respective list of reports.



Within the Approval List, you will see any reports awaiting your approval. If you would like to sort these reports differently, you can do so by clicking the menu button in the top right corner of the approval panel. If you have both expense reports and pre-approvals awaiting approval, you can toggle between the two by clicking the titles at the top. If you have many reports awaiting approval and would like to search for a specific one, you can do so by clicking the magnifying glass icon and searching by Expense Owner or Report ID.

Note that any reports submitted with compliance warnings will be noted with a red triangle symbol on the line of the report.



Click on any report in the approval list, and the report header will display in the window on the right side of the screen. This will include a summary of the expenses, funding sources, and all receipts attached to the report.



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The screenshot shows a report preview window with the following details:

Report Owner	WebstUR Spider
Submit Date	09/27/2019 <small>This report was recalled and resubmitted.</small>
Expense Report ID	010019536728
Business Purpose	Flight to the National Mascot Conference
Rule Description	Expense Owner's Boss - Route to Expense Owner's Supervisor

From the report preview window, you can perform the following functions:

- **Open** – This will open the full report
- **PDF** – This will provide several options for printing the report to PDF
- **Tracking** – This provides a summary of the tracking of the expenses in the report. Note that based on the index charged, each line on a report can potentially route differently. Click on each expense line to view the tracking information for that item.
- **Return** – Return the report to the submitter. The approver will be asked for an explanation and all lines of the report will be rejected. The entire report will be returned to the submitter. If you would like to reject individual line items, you can do so in the full report.
- **Approve** – This will approve the full report. It is recommended that approvers review the detailed report before approving.
- **Reassign** – Clicking on the ... will display the option to reassign the report. Generally, this functionality should not be used. If you believe you have received a report to approve in error, please contact [Accounts Payable](#).

Additionally, you may add comments to the report by entering them in the **Comments** section of the report summary.

The screenshot shows the 'Index (Allocation)' section with the following data:

23456	School Spirit
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Below this is the 'Comments (0)' section, which includes an 'Add Comment' text box and a 'Post' button.

We encourage approvers to open the full report by clicking the **OPEN** button at the top of the report summary. After opening the full report, all of the submitted expenses will now be listed on the left side of the screen. To view details of an expense, click on the expense and the details will display on the right side of the screen, including any receipts.



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The screenshot displays the Chrome River interface for an expense report titled "National Mascot Conference 2019". On the left, a table lists expenses with columns for DATE, EXPENSES, SPENT, and APPROVED. On the right, a detailed view of an "Airfare" expense is shown, including fields for Transaction Date, Spent, Approved, Business Purpose, Description, Airline, and Trip Type.

DATE	EXPENSES	SPENT	APPROVED
Sun 09/15/2019	Airfare	275.00 USD	275.00 USD
Sun 09/15/2019	Meals - Per Diem	52.80 USD	52.80 USD
Mon 09/16/2019	Meals - Per Diem	66.00 USD	66.00 USD
Mon 09/16/2019	Parking	30.00 USD	30.00 USD
Tue 09/17/2019	Meals - Per Diem	66.00 USD	66.00 USD
Wed 09/18/2019	Meals - Per Diem	13.20 USD	13.20 USD
Wed 09/18/2019	Car Rental	210.00 USD	210.00 USD

Total Approved Amount: 713.00 USD

Airfare Expense Details:
Transaction Date: 09/15/2019
Spent: 275.00 USD
Approved: 275.00 USD
Business Purpose: Professional development and networking with other mascots
Description:
Airline: JetBlue
Airline (additional): -- Select --
Class: Economy/Coach
Trip Type: Employee Travel

Any expenses submitted with a compliance warning will be noted with a red triangle symbol on the line item. If you click on these line items, a warning box will display at the top of the expense summary detailing the compliance violation along with an explanation from the report owner.

The screenshot shows a compliance warning box for a "Parking" expense. The warning message states: "Receipt required for this expense". Below the message, there is a text input field for a response, which contains the text: "Sorry, I lost my receipt!".

Receipt required for this expense #201

Please attach receipt, or, if that's not possible, please ensure that all fields below are entered accurately and provide an explanation for why you were not able to attach a receipt.

RESPONSE
Sorry, I lost my receipt!

Similar to the report header, you may also add comments to individual expense items by entering them under the **Comments** section.

Within an individual expense, approvers have the option to reassign the item to another approver, to adjust the item, or to return the item to the expense submitter.



Reassign an Expense

Much like reassigning the report, the approver can reassign a line item to another system user. However, generally, this functionality should not be used. If you believe you have received a report to approve in error, please contact Accounts Payable.

Adjust an Expense

The following are the items that an approver can adjust on an expense:

- **Approved amount** – approvers can only adjust the approved amount down
- **Business purpose**
- **Index (Allocation)**
- **Comments** – approvers can add an additional comment, but they cannot remove comments
- **Attachments** – approvers can add additional attachments

After making an adjustment, an adjustment note is required by the approver. They also have the option on whether or not to notify the expense owner of the adjustment. If they would like the report submitter to receive an email detailing the adjustment, select the **Notify Expense Owner** checkbox. If not, uncheck this box. Click **Save** to finalize the adjustment.

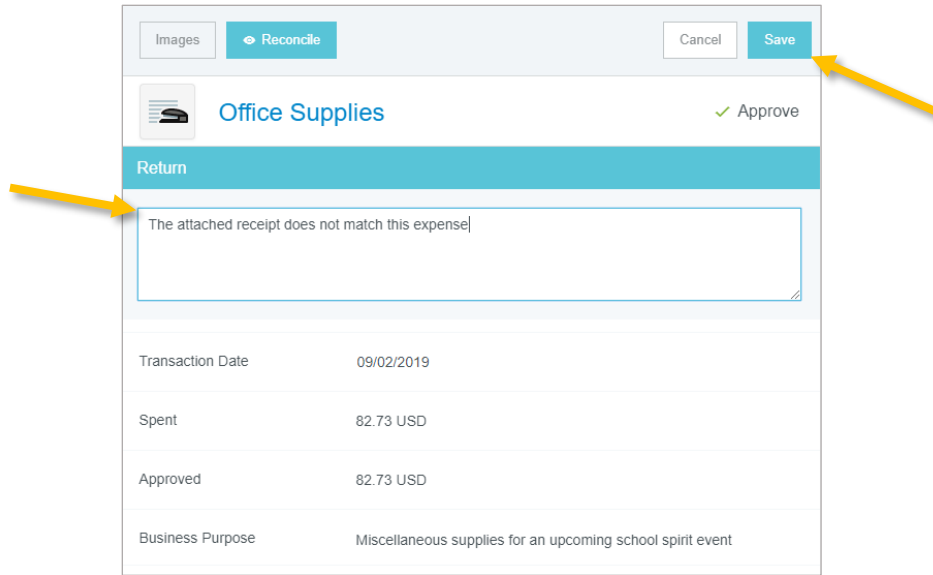
The screenshot shows a web form for adjusting an expense. At the top right, there are 'Cancel' and 'Save' buttons. Below this is a header for 'Office Supplies' with a '✓ Approve' status. The main section is titled 'Adjust' and contains a text area with the placeholder 'Adjusted amount to match receipt'. Below the text area is a checked checkbox labeled 'Notify Expense Owner'. The bottom section contains several fields: 'Transaction Date' (09/02/2019), 'Spent' (82.73 USD), 'Approved' (72.73 USD), and 'Business Purpose' (Miscellaneous supplies for an upcoming school spirit event). Three yellow arrows point to the 'Save' button, the text area, and the 'Notify Expense Owner' checkbox.

Return an Expense

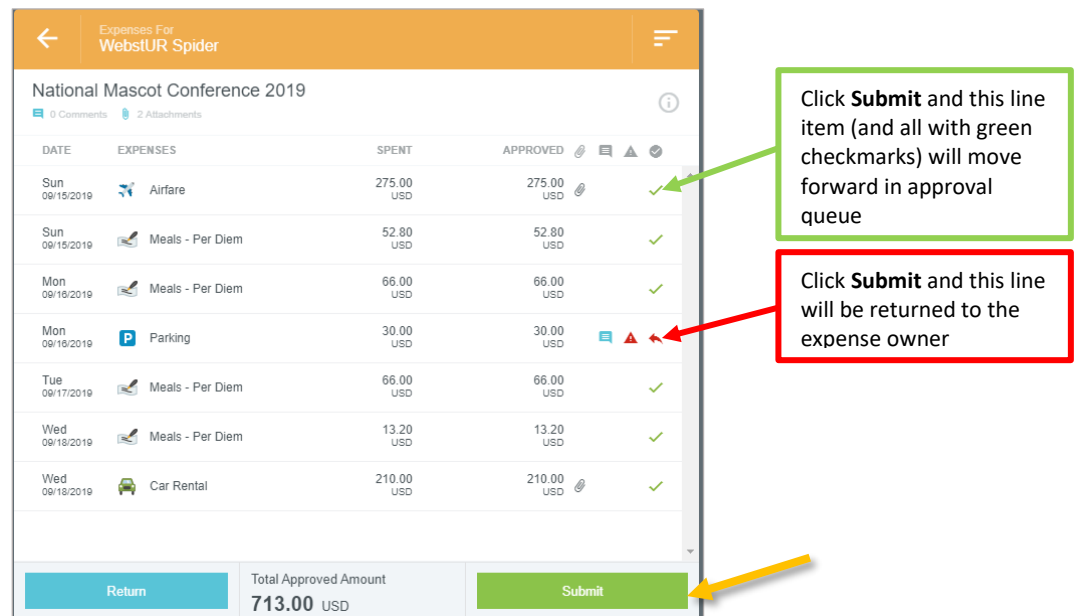
Individual expenses can be returned to the expense owner. After clicking **Return** on the selected expense, the approver is required to enter an explanation of why the expense is being returned. After doing so, click **Save**.



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After indicating an expense (or expenses) you would like to return, any item(s) selected for return will be noted with the red return arrow, and those that are approved will be noted with the green checkmark. Note that no item(s) will be returned until you select the **Return** or **Submit** button at the bottom of the expense line list. Selecting the Submit button will return the expense(s) noted for return. Selecting the Return button will return all expense lines in the report to the expense owner.



Click **Submit** and this line item (and all with green checkmarks) will move forward in approval queue

Click **Submit** and this line will be returned to the expense owner

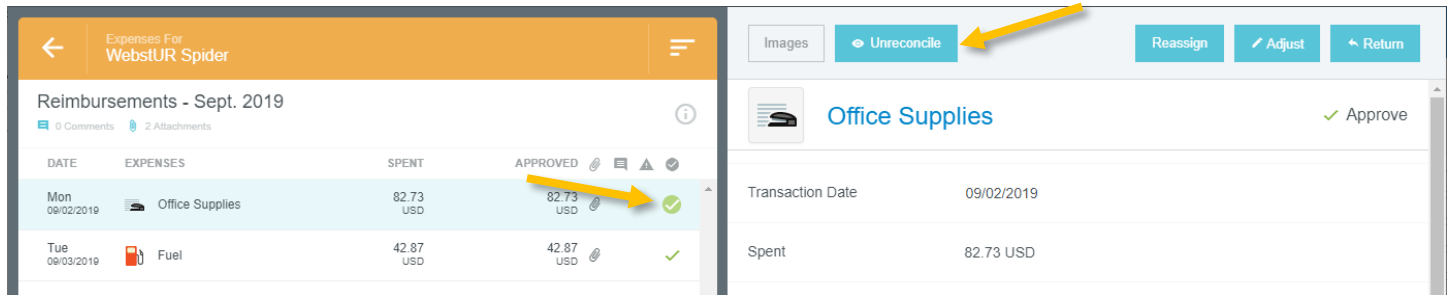
Note that if you return a report, there are limited changes the expense owner can make, and they cannot add any new expenses to the report. If you need the expense owner to add a new expense, instead of returning the report, contact the expense owner and ask them to **Recall** the report. This provides the expense owner more flexibility in editing the report.



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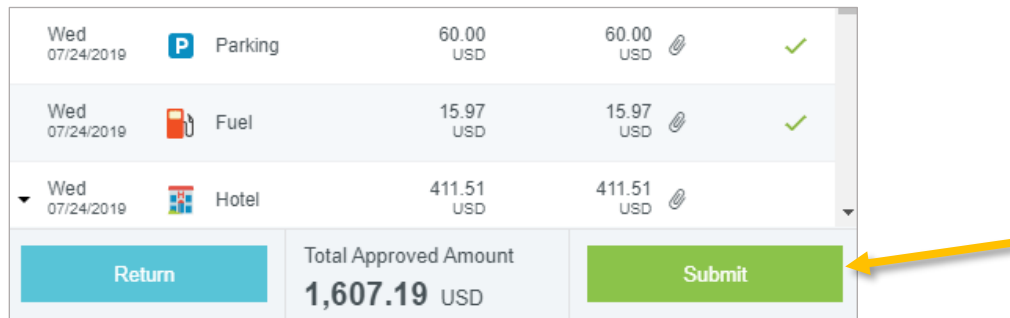
Reconcile

Each individual expense also has a **Reconcile** button. If you are auditing a report with multiple expense lines, you can click this button to mark lines you have already reviewed. The line will now appear with a green circled checkmark next to it on the report summary, but this will have no impact on the processing of the expense. To remove this icon, click the **Unreconcile** button.

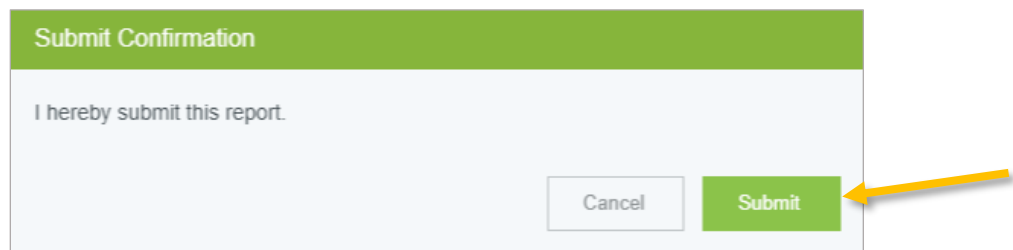


Approve a Report

After you have reviewed the report and are ready to approve, click the **Submit** button at the bottom of the expense report summary. (Note: The approval function within a report is indicated using the Submit button (as opposed to Approved) due to the system needing to recalculate the report in the event there were adjustments made by the approver.)



Once the Submit button has been clicked, the submit confirmation screen will appear. Again, click **Submit**.



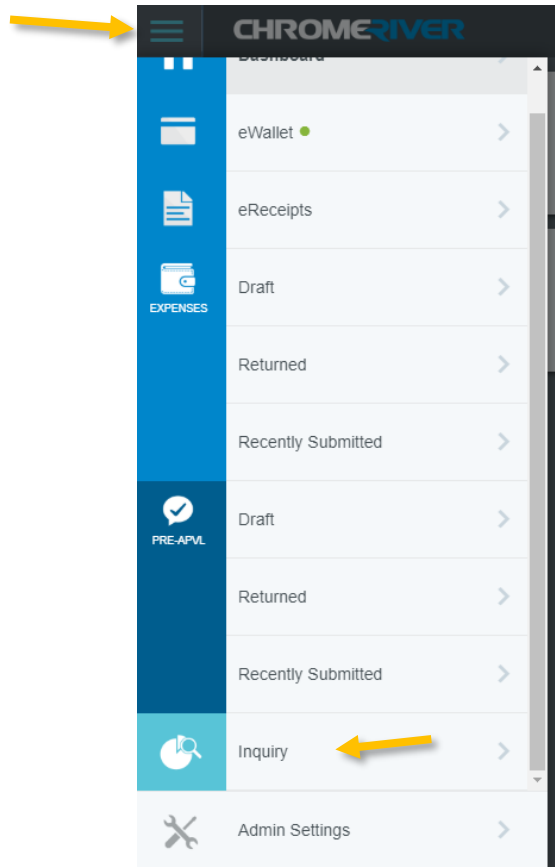
After clicking submit, a submit confirmation will be displayed.



Inquiry

The Inquiry function allows you and your delegates to perform quick inquiries on your activity by category. These inquiries include items such as expense reports, expense items, delegates, cash advances, pre-approvals, and paid expenses.

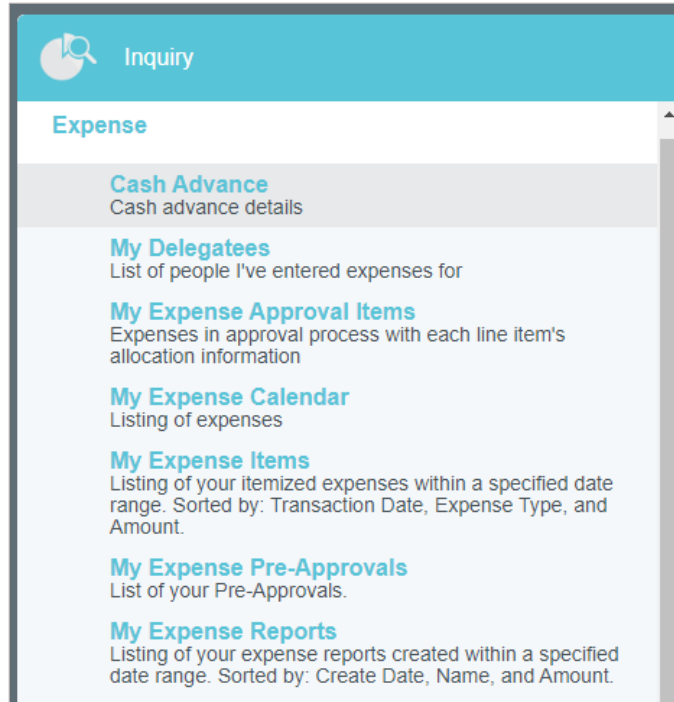
To access inquiry reports, tap the **Menu Button** in the upper left corner of the homepage and click **Inquiry**.



You are now in the Inquiry menu. Click the **Expense** header to expand the list of reports available. To run a report, simply click on the title.



CHROME RIVER USER MANUAL



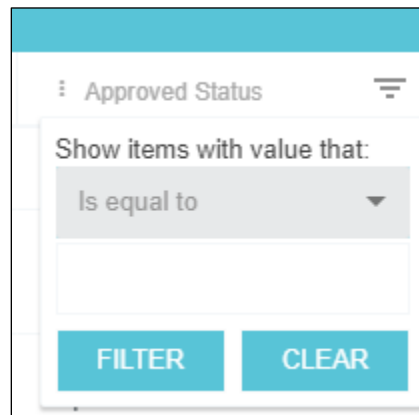
The results will appear in the window on the right. By default, the reports filter results to show the current month. Most reports will provide date filter in the right corner to adjust the date range displayed.

Action Date:

Drag a column header and drop it here to group by that column

Report Name	Report ID	Submit Date	Status	Requested Amount	Approved Amount
National Mascot Conference 2019	010000368183		Draft	892.80	892.80

Any columns with a funnel icon can be filtered based on specified criteria.





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Any columns with the three-dot icon can be used to group results. Simply drag the header name into the blue bar at the top of the report, and the results will be grouped accordingly.

...	Report Name	Trans Date	Expense Type ↑	Matter	Client Name	Description	Approved Status
Expense Type : Airfare (Count: 2)							
...	Fun trip to Chicago	10/01/2019	Airfare	D10003	UR Better	--	Exported

Below is a list of the most helpful inquiries:

My Expense Reports – Provides a list of expense reports by total dollar amount. This report only reflects reports currently in process (Draft, Pending Approval, or Returned). Once an expense has been approved and exported to Banner to be paid, it will no longer appear.

My Expense Items – Allows you to view the status (Draft, Pending Approval, Approved, Returned, Exported) of each individual expense under your account. You can also request expense item details along with the associated receipt images for up to 50 line items as a PDF. Simply click **Request Images** and a link to the PDF will be emailed to your primary email address.

My Delegates – Provides a list of people for whom you serve as a delegate and have unsubmitted expenses

My Expense Calendar – Shows your expenses in the form of a calendar. You can view the calendar by month with the option to view all or specific expense types. By clicking onto an expense within the calendar, you can view the details of a specific expense.

My Expense Approval Items – Provides approvers a list of expense items, per expense owner, that are their responsibility to approve. The inquiry includes each expense per line item along with the charged index under the Matter column. The status of each expense can be found in the Action column, which will show if an expense is Pending, Returned, or Approved. Once reports are fully approved by all approvers, the expense items will no longer appear in this report.