

FLORIDA
SOUTHWESTERN
STATE COLLEGE

Chrome River User Guide

Table of Contents

What is Chrome River?	2
Chrome River Login	2
Chrome River Landing Page	2
Delegates	
Authorize a Delegate.....	3
Work as a Delegate	3
Remove a Delegate	4
Authorize an Approval Delegate.....	5
Remove an Approval Delegate	7
Pre-Approval Report	
Create a New Pre-Approval Report	9
College Paid Items	10
Allocations	10
Track a Pre-Approval Report	17
Recall a Pre-Approval Report	18
Returned Pre-Approval Report	20
Approved Pre-Approval Report	21
Expire a Pre-Approval Report.....	22
Expense Report	
Create a New Expense Report	24
Track an Expense Report	28
Recall an Expense Report.....	29
Returned Expense Report.....	31
Approved and Exported Expense Report.....	32
Receipt Upload	
Chrome River SNAP.....	34
Email Receipt.....	38
Upload from Desktop.....	39
Warnings and Violations	40
Report Approval	41
Chrome River Help Center	42

What is Chrome River?

Chrome River is a user-friendly and mobile-friendly Travel and Expense Management System. Authorized users can access Chrome River anytime and on any device. Chrome River allows authorized users to submit Pre-Approval and Expense reports in an easy and efficient manner.

Chrome River Login

Launch the Chrome River application from any web browser, <https://app.chromeriver.com/login/sso/saml?CompanyID=fsw.edu>

Chrome River Landing Page

Once you are logged in to Chrome River, you will see the landing page. You will find the navigation bar at the top of the screen, dashboard on the left, and College's travel information on the right.

The screenshot shows the Chrome River landing page for user Jazmin Gonzalez at Florida Southwestern State College. The page is divided into three main sections:

- Navigation Bar:** Located at the top, it includes the Chrome River logo, a help icon, a settings icon, and the user's name and email address.
- Dashboard:** Located on the left side, it features four main categories: eWallet, Approvals, Expenses, and Pre-Approval. Each category has a 'Create' button and a summary of items (e.g., 0 Credit Card Items, 0 Receipts, 0 Expense Reports, 2 Pre-Approvals). Below these are sub-sections for Draft, Returned, and Submitted items with counts and timeframes (e.g., Submitted Last 90 Days).
- College's travel information:** Located on the right side, it includes a 'CONTACT' section with a welcome message and contact information, a 'HELP' section with quick start guides for creating reports and getting help, and a 'REMINDERS' section with email receipt instructions and expense report deadlines.

e

The navigation bar remains at the top of your screen no matter where you are in the application and provides access to many functions. It also serves as the home button.

The dashboard provides quick access to the users' Chrome River reports. The items displayed are based on the users' access.

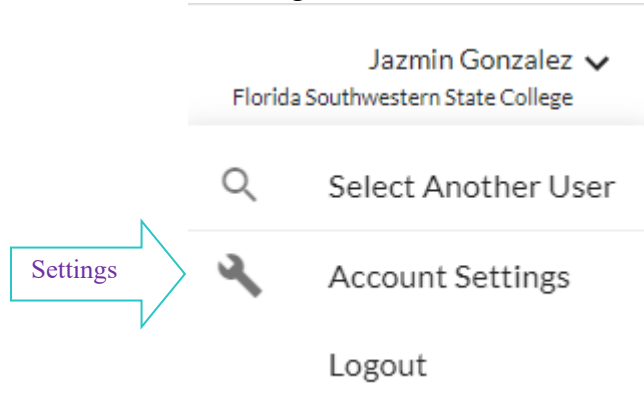
The College's travel information includes contact information, policies, announcements, and resources to navigate Chrome River.

Delegates

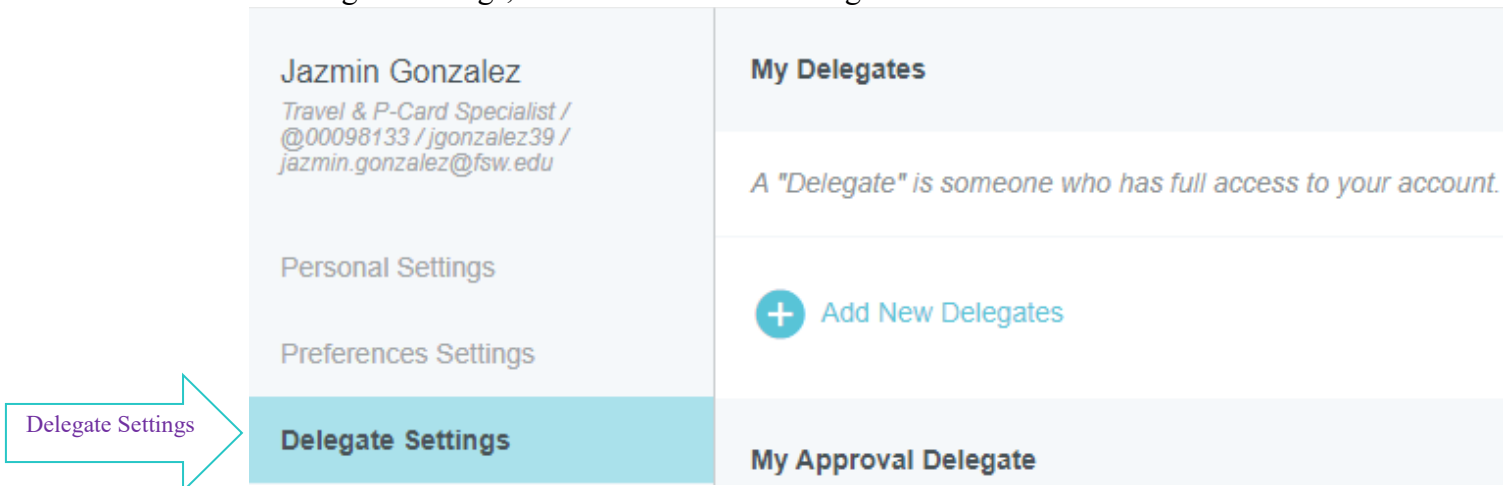
A delegate creates and submits Pre-Approval and Expense reports for another user and accesses their settings menu, home screen, and reports.

Authorize a Delegate

1. Click your name, then click Settings

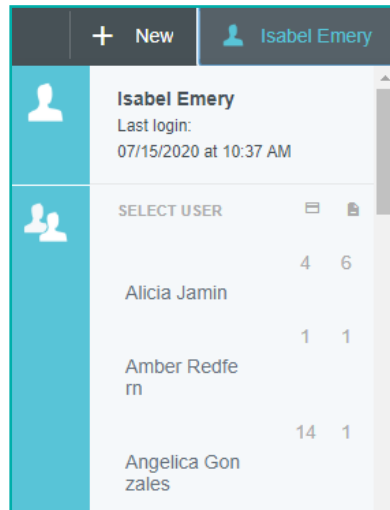


2. Click Delegate Settings, then click Add New Delegates



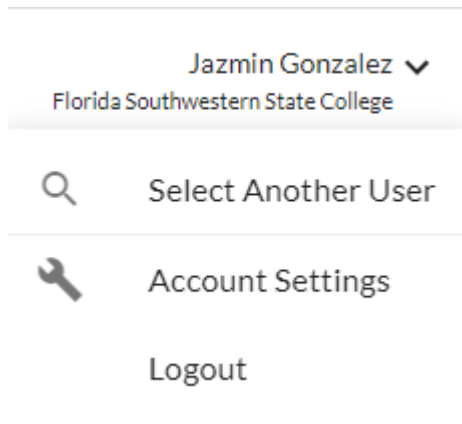
Work as a Delegate

1. Click your name, and you will see a list of travelers below your name

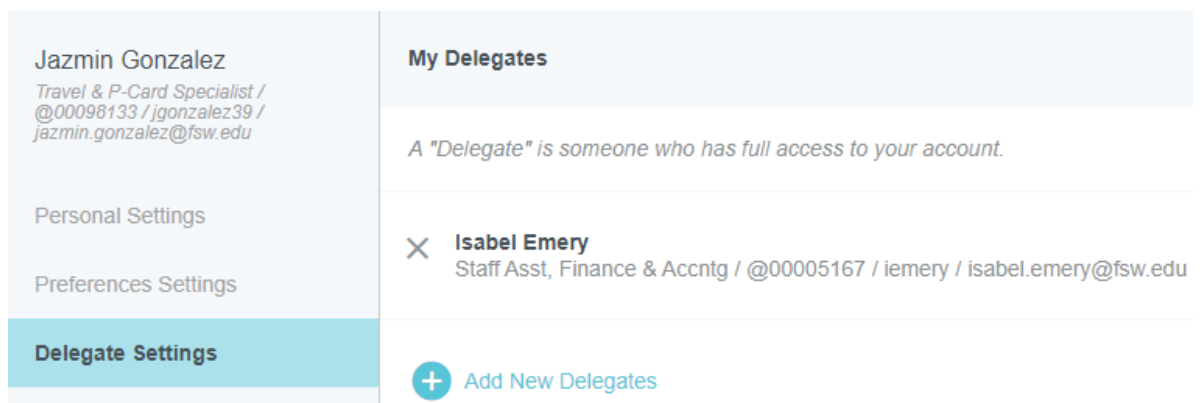


Remove a Delegate

1. Click your name, then click Settings



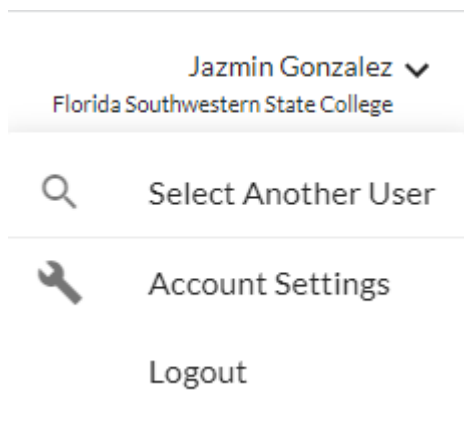
2. Click Delegate Settings, then click X next to the delegate's name



Authorize an Approval Delegate

An approval delegate temporarily approves Pre-Approval and Expense reports for another user via email. However, they will not be able to access the approver's approval screen.

1. Click your name, then click Settings



2. In Delegate Settings, under My Approval Delegate, click Add Approval Delegate

The screenshot shows a user profile for Jazmin Gonzalez on the left sidebar. The main content area is titled 'My Delegates' and includes a description: 'A "Delegate" is someone who has full access to your account.' Below this, a delegate named Isabel Emery is listed with a close button (X) and her details: 'Staff Asst, Finance & Acctng / @00005167 / iemery / isabel.emery@fsw.edu'. There is a '+ Add New Delegates' button. The 'My Approval Delegate' section is highlighted, with the description: 'An "Approval Delegate" helps you with approvals during a specified time.' and a '+ Add Approval Delegate' button.

3. You are able to set the start and end dates for the approval delegate authorization

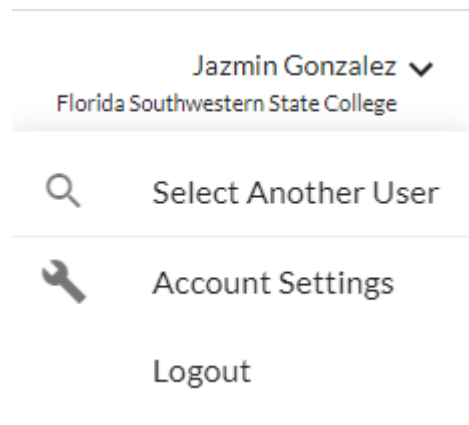
The screenshot shows the 'My Approval Delegate' configuration form. It includes a title bar, a description: 'An "Approval Delegate" helps you with approvals during a specified time.', and three input fields: 'Select a User' with a search box labeled 'Search for Name', 'Start Date' with a calendar icon, and 'End Date' with a calendar icon. At the bottom, there are 'Save' and 'Cancel' buttons.

Chrome River will send an email to you and the approval delegate describing the routing changes that will occur during your specified period. All Pre-Approval and Expense reports assigned to you will automatically queue up for the approval delegate to approve.

Remove an Approval Delegate

At the end of your specified period, the system will automatically deauthorize your approval delegate, and the approval process will return to default status. If you return earlier than expected or simply want to revoke your authorization.

1. Click your name, click Settings



2. Click Delegate Settings, then click X next to their name

Jazmin Gonzalez <i>Travel & P-Card Specialist / @00098133 / jgonzalez39 / jazmin.gonzalez@fsw.edu</i>	My Delegates
Personal Settings	<i>A "Delegate" is someone who has full access to your account.</i>
Preferences Settings	X Isabel Emery Staff Asst, Finance & Acctng / @00005167 / iemery / isabel.emery@fsw.edu
Delegate Settings	+ Add New Delegates
Notification Settings	My Approval Delegate
Privacy Policy	<i>An "Approval Delegate" helps you with approvals during a specified time.</i>
About Chrome River	X Angelica Grandchamps(09/04/2022-09/13/2022) Budget Analyst / @00040870 / agrandchamps / agrandchamps@fsw.edu

Pre-Approval Report

A Pre-Approval report represents the estimated expenses the traveler will incur and is submitted for approval from all required approvers before the travel occurs. Funds are encumbered when a Pre-Approval report is approved by all required approvers.

Create a New Pre-Approval Report

1. Ensure the traveler's name is on the upper right corner. If it isn't, click your name to view your list of travelers, then select the traveler. After selecting the traveler, click New, and select New Pre-Approval Report

The screenshot shows a user profile dropdown menu for Jazmin Gonzalez. The menu items are: Isabel Emery (with a person icon), Select Another User (with a magnifying glass icon), Account Settings (with a wrench icon), and Logout. A red box labeled 'Click create' with a downward arrow points to the 'Create' button in the 'Pre-Approval' header. Below the header is a table with three columns: Draft (0), Returned (0), and Submitted Last 90 days (0).

Pre-Approval		
0	0	0
Draft	Returned	Submitted Last 90 days

2. Complete the header with the following information:
- Report Name
 - Start and End Date
 - Business Purpose – Describe travel purpose and benefit to the College
 - Trip Type
 - Purpose
 - College Paid Items (*If applicable*) – List items paid with Purchasing Card and Check Request(s)
 - Origination and Destination
 - Fiscal Year
 - Index,
- then click Save

Cancel
Save

✓ Pre-Approvals For Angelica Gonzales

Report Name

Start Date 📅

End Date 📅

Number of Days

Pay Me In

Business Purpose

Please enter a description of the travel purpose and benefit to the college in the "Business Purpose" field above.

Trip Type

Purpose

College Paid Items Exist

Origination

Destination

Fiscal Year

Index

Note:

- If College paid items exist, click the College Paid Items Exist box, and enter the following information – amount(s), item(s) description, etc.
- If using more than one index, click Add Index. You may modify allocations by percentage or specific amount.

Index

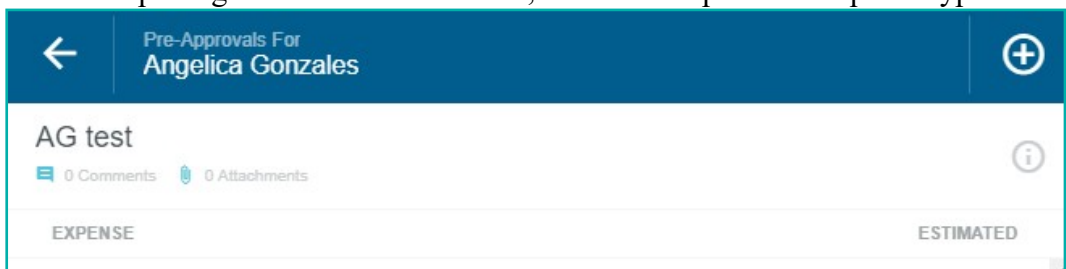
FIN8 Porter, Kathleen - Chart 1 Financial Services

+ Add Index

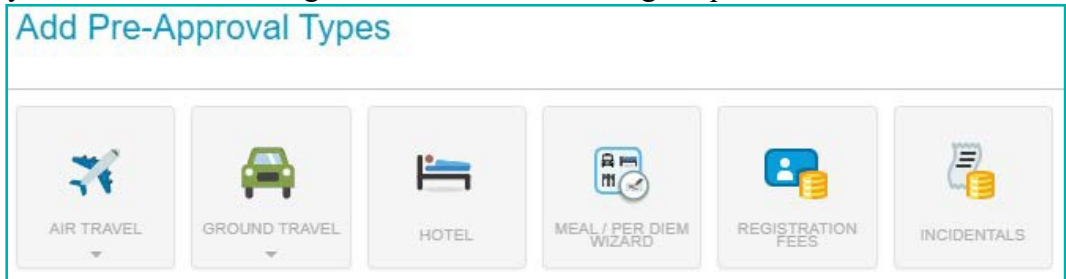
	Split Equally	Clear Splits
x FIN8 Porter, Kathleen - Chart 1 Financial Services	63.77%	3.52
x OITSPD Dudley, Jason - Chart 1 Information Technology SPD	36.23%	2.00
	100.00%	5.52

+ Add Index

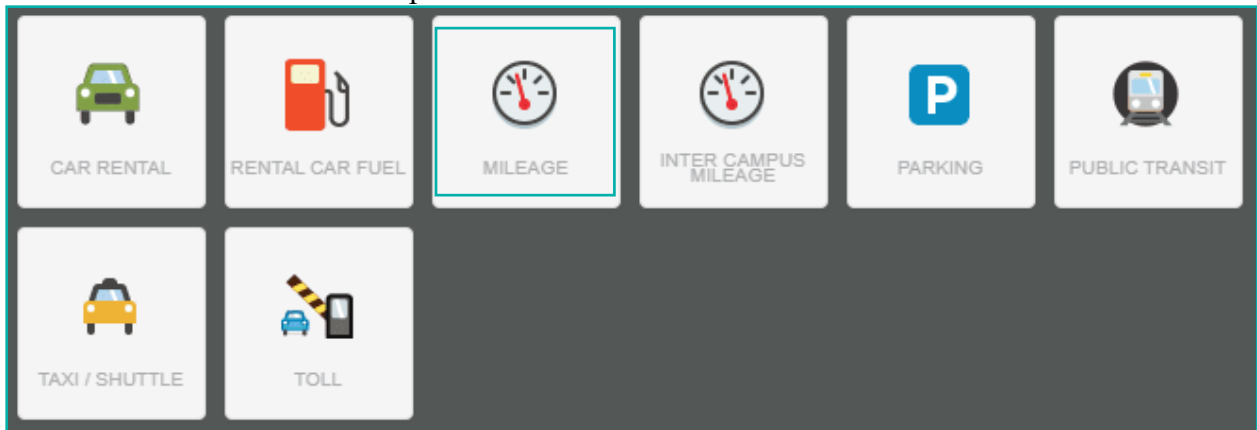
- Check out the “Allocation” video tutorial available in Chrome River Help Center for more information.
3. After completing the header information, click + to expand the expense types list



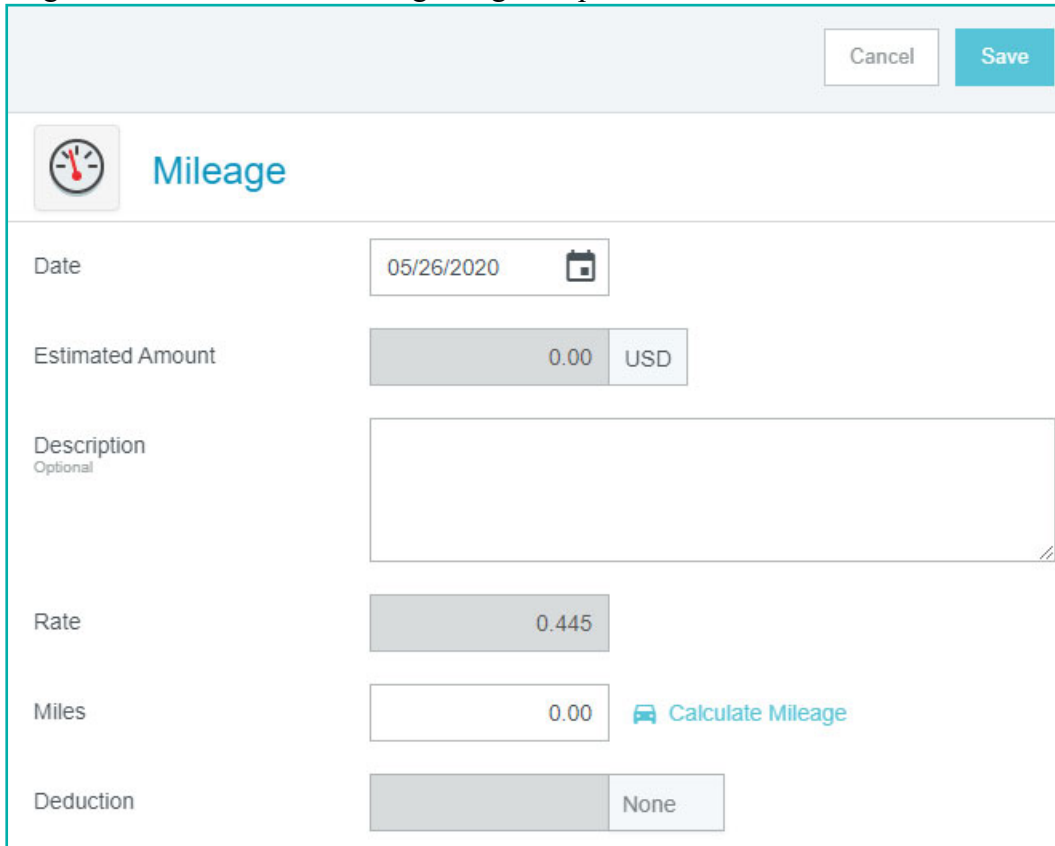
You may add potential expenses by choosing from the expense types list. For example, you will need to select ground travel to add mileage expense



GROUND TRAVEL expands to:



4. Click the mileage expense icon, then click Calculate Mileage where you will enter your origination and destination using Google Maps



The screenshot shows a 'Mileage' expense entry form. At the top right, there are 'Cancel' and 'Save' buttons. The form has a header with a clock icon and the word 'Mileage'. Below the header, there are several input fields: 'Date' with a calendar icon and the value '05/26/2020'; 'Estimated Amount' with a value of '0.00' and a 'USD' dropdown; 'Description' with a text area and the label 'Optional'; 'Rate' with a value of '0.445'; 'Miles' with a value of '0.00' and a 'Calculate Mileage' button with a car icon; and 'Deduction' with a value of 'None'.

Date	05/26/2020
Estimated Amount	0.00 USD
Description <small>Optional</small>	
Rate	0.445
Miles	0.00 Calculate Mileage
Deduction	None

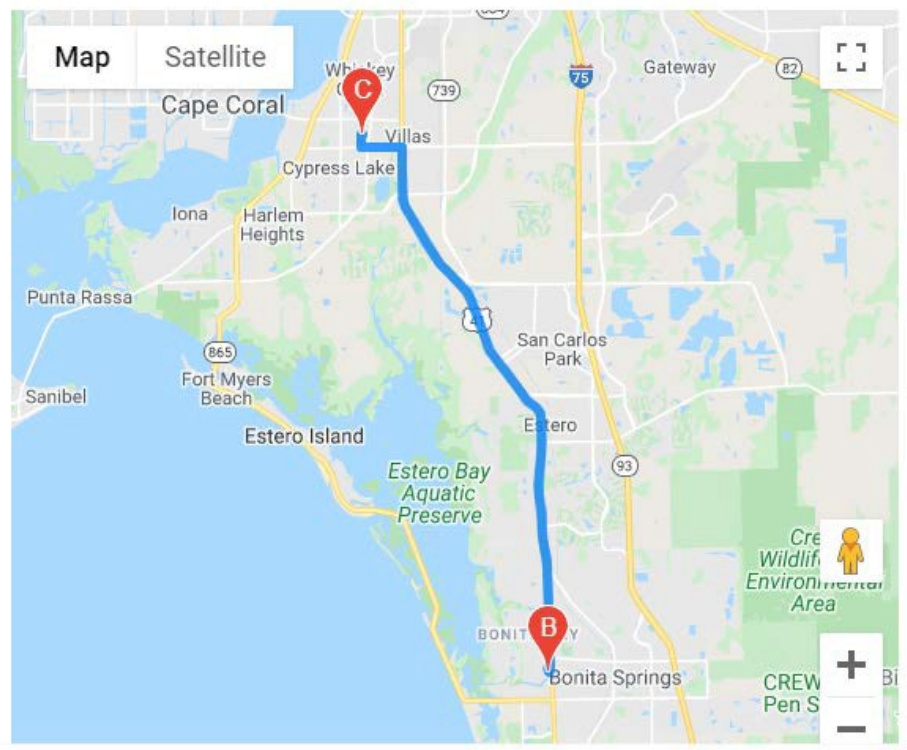
5. After calculating mileage, click Save Trip. The origination and destination information can be found in the description box

Calculate Mileage ✕


- 🗑️
- 🗑️
- 🗑️


+ Add Destination Return to Start

33.84 Miles



Cancel Save Trip

 **Mileage**

Date	<input type="text" value="08/20/2020"/> 
Estimated Amount	<input type="text" value="15.06"/> <input type="text" value="USD"/>
Description <small>Optional</small>	<input type="text" value="From: FSW - Florida SouthWestern State College, College Parkway, Fort Myers, FL, USA
To: 27400 Riverview Center Blvd, Bonita Springs, FL, USA"/>
Rate	<input type="text" value="0.445"/>
Miles	<input type="text" value="33.84"/> 🚗 Calculate Mileage
Deduction	<input type="text" value="None"/>

6. After saving the expense, you may preview the list of potential expenses on the left. If everything looks correct, click Submit

Pre-Approvals For
Angelica Gonzales

Test

0 Comments 0 Attachments

EXPENSE	ESTIMATED
Mileage	15.06 USD
Parking	5.00 USD

PA Report ID
QA0001019360

Total Estimated Amount
20.06 USD

Submit

- After submitting the report, you will be asked to review the information on the header. If everything looks correct, click Submit

Submit Preapproval

I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.

Test

Report Owner	Angelica Gonzales
Created By	Angelica Gonzales
Create Date	08/20/2020
Pay Me Amount	20.06 USD
PA Report ID	QA0001019360
From Date	08/20/2020
To Date	08/20/2020
Business Purpose	test



Expense Summary

	AMOUNT (USD)	SUBMITTED (USD)
Mileage	15.06	0.00
Parking	5.00	0.00
Total	20.06	0.00

Account Summary

		AMOUNT (USD)
FIN8	Porter, Kathleen - Chart 1 Financial Services	20.06
Total		20.06

Comments (0)

Attachments (0)  

Track a Pre-Approval Report

A submitted Pre-Approval report can be tracked by going to the traveler's dashboard.

1. On the traveler's dashboard, click Submitted Pre-Approval

Expenses

2 Draft	0 Returned	1 Submitted Last 90 Days
------------	---------------	--------------------------------

Pre-Approval

2 Draft	0 Returned	4 Submitted Last 90 days
------------	---------------	--------------------------------


← Click Pre-approval

2. Below is a list of all Pre-Approval reports for this user and their status. Select the report you want to track, then click Tracking

Submitted Pre-Approvals			Open	PDF	Tracking	Expire
Ready for Test 2 QA0000970802	05/07/2020	4.18 USD APPROVED	Ready for Test 2			
Ready for Test QA0000970800	05/07/2020	42.00 USD APPROVED	Report Owner	Angelica Gonzales		
test if INEI and E032 will generate QA0000970295	04/24/2020	0.00 USD USED / EXPIRED	Created By	Angelica Gonzales		
test to see if INEI generates QA0000970225	04/22/2020	10.00 USD USED / EXPIRED	Create Date	05/07/2020		
AGonzales_ER Test QA0000963785	04/17/2020	0.00 USD USED / EXPIRED	Pay Me Amount	4.18 USD		
test Pre-Approval Reminder email QA0000961467	04/15/2020	14.46 USD USED / EXPIRED	PA Report ID	QA0000970602		
			From Date	05/07/2020		
			To Date	05/07/2020		
			Business Purpose	Add UI Rule to hide College Paid isn't ch		

- After clicking Tracking, you will be able to see where/who the report is assigned to

Tracking for Ready for Test 2
✕

Status	Approved
Estimated Amount	4.18 USD
Routing Steps	
	
Step Number	6
Approver	BudgetEncumber:Firmwide
Assigned Date	05/07/2020 12:30 PM
Step Status	Approved
Completed Date	05/07/2020 12:33 PM

Recall a Pre-Approval Report

A submitted Pre-Approval report can be recalled as long as it has not been fully approved. The recall button will not function for Pre-Approval reports with expired, applied, partially applied, or approved status.

- On the traveler's dashboard, click Submitted Pre-Approval

Expenses

2

Draft

0

Returned

1

Submitted
Last 90 Days

Pre-Approval

2

Draft

0

Returned

4

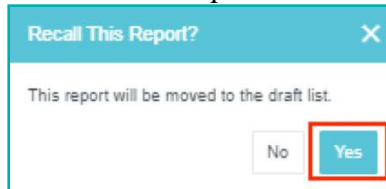
Submitted
Last 90 days

← Click Pre-approval

- Select the report you want to recall, click Recall

Submitted Pre-Approvals			Open	PDF	Tracking	Recall
AG_Test_052620 010000908213	05/26/2020	16.06 USD PENDING	AG_Test_052620			

3. Click Yes to confirm you want to recall the report



4. The report can be found on the traveler's Draft Pre-Approval. It will retain any notes entered during the incomplete approval process

Expenses			
2	0	1	
Draft	Returned	Submitted Last 90 Days	

Pre-Approval			
2	0	4	
Draft	Returned	Submitted Last 90 days	

Click Pre-approval draft

5. To edit the report, select the report from the Draft Pre-Approvals list, click Open, then click Edit. After editing, click Submit on the left

Draft Pre-Approvals			Open	Delete	PDF	Submit
is tst2 fy21 working QA0001010680	07/08/2020	5.52 USD	is tst2 fy21 working			

Pre-Approvals For Maureen Barisonek		PDF	Images	Delete	Edit
is tst2 fy21 working					
EXPENSE		ESTIMATED			
Mileage	5.52 USD				
PA Report ID QA0001010680		Total Estimated Amount 5.52 USD		Submit	
Pre-Approvals For Maureen Barisonek					
Report Name	is tst2 fy21 working				
Start Date	07/08/2020				
End Date	07/08/2020				
Number of Days	1				
Pay Me In	USD - US Dollars				
Business Purpose	test				
Trip Type	In District				

Returned Pre-Approval Report

When an approver returns a Pre-Approval report, the report will appear in the Returned Pre-Approval. The traveler and delegate are notified via email.

1. On the traveler's dashboard, click Returned Pre-Approval

The dashboard shows two main sections: 'Expenses' and 'Pre-Approval'. Each section has three columns representing different report statuses: Draft, Returned, and Submitted (Last 90 Days). The 'Expenses' section shows 0 Draft, 0 Returned, and 0 Submitted. The 'Pre-Approval' section shows 0 Draft, 1 Returned, and 0 Submitted.

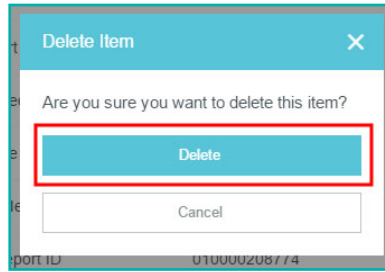
Section	Draft	Returned	Submitted (Last 90 Days)
Expenses	0	0	0
Pre-Approval	0	1	0

2. Select the report to view the approver's comment. If certain expense line items are highlighted in yellow, those are the only ones that need your attention. If you need to edit the report, click Open, click Edit, make necessary edits, then click Submit

The screenshot shows the 'Returned Pre-Approvals' list and the detailed view of a report. The list shows two reports: 'test to delete' (06/01/2020, 25.00 USD) and 'mb test 27' (07/01/2020, 6,096.00 USD). The detailed view shows the report details for 'test to delete', including the expense line item 'Rental Car Fuel' (25.00 USD) and the report owner 'Maureen Barisonek'.

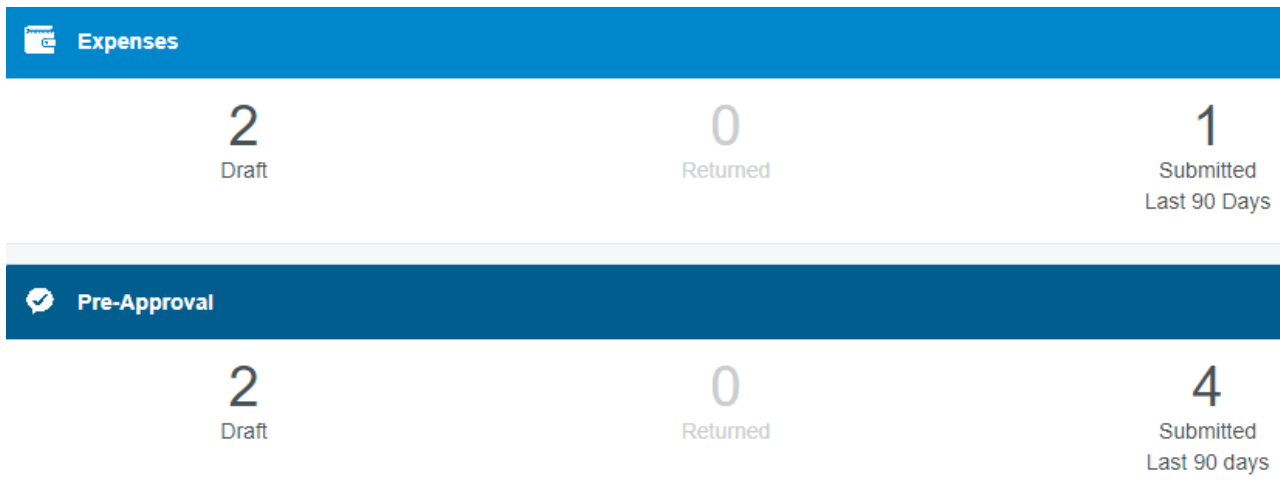
Report Name	Start Date	End Date	Number of Days	Pay Me In	Business Purpose	Trip Type
test to delete	06/01/2020	06/01/2020	1	USD - US Dollars	test	Out of District

3. If you need to delete the Pre-Approval report, click Delete. Click Delete again to confirm you want to delete the report



Approved Pre-Approval Report

1. On the traveler's dashboard, click Submitted Pre-Approval



Section	Draft	Returned	Submitted (Last 90 Days)
Expenses	2	0	1
Pre-Approval	2	0	4

2. Below is a list of all Pre-Approval reports for this user and their status

Submitted Pre-Approvals		
test Pre-Approval Reminder email QA0000981467	04/15/2020	14.46 USD APPROVED
AGonzales_Chrome River QA0000981367	04/14/2020	0.00 USD USED / EXPIRED

3. Select the Pre-Approval report to find the TA# at the bottom of the preview screen

Comments (3)

Auto Bot (Budget Checker) 04/15/2020 02:30 PM
Approved
1-FIN8---60501--- 14.46: (Inter Campus Mileage) available

Auto Bot (Budget Checker) 04/17/2020 09:56 AM
Approved
1-FIN8---60501--- 14.46: (Inter Campus Mileage) available

Auto Bot (Encumber) 04/17/2020 09:59 AM
Approved
Successful encumber with POID TA012634

Expire a Pre-Approval Report

A Pre-Approval report can be expired when a planned trip has been canceled or when funds need to be released.

1. On the traveler's dashboard, click Submitted Pre-Approval

Expenses

2

Draft

0

Returned

1

Submitted
Last 90 Days

Pre-Approval

2

Draft

0

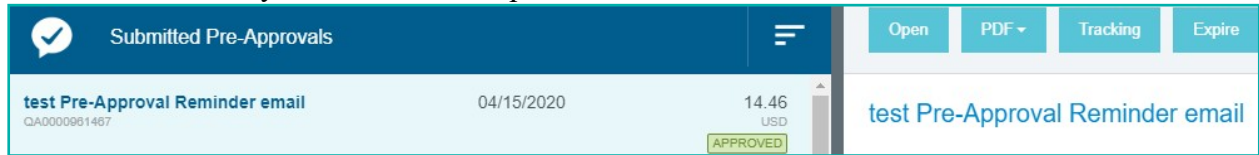
Returned

4

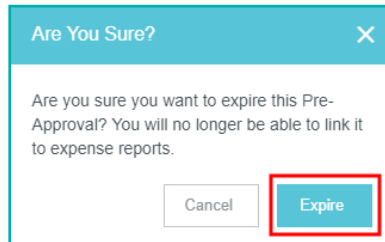
Submitted
Last 90 days

← Click Pre-approval

2. Select the report you want to expire, then click Expire on the preview screen. The Expire button is only accessible on the preview screen



3. Click Expire again to confirm you want to expire the report. An expired Pre-Approval report will remain on the Submitted Pre-Approval list, but it will no longer be able to be linked to an Expense report



4. When a Pre-Approval report has been expired, the status changes to USED/EXPIRED, and the Expire button disappears



Expense Report

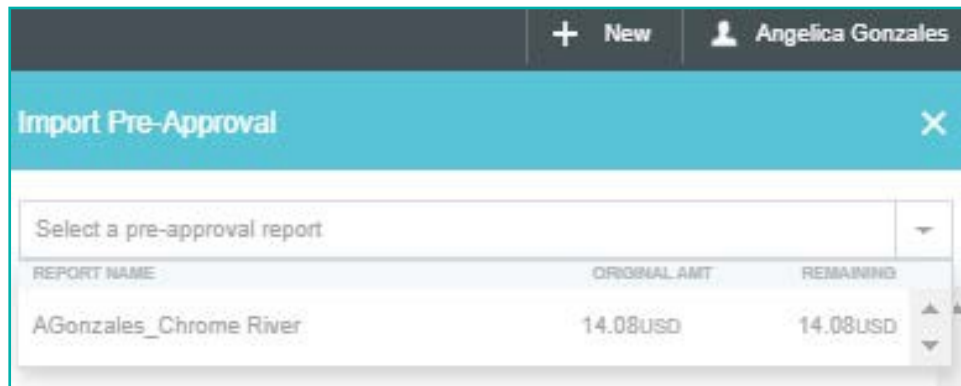
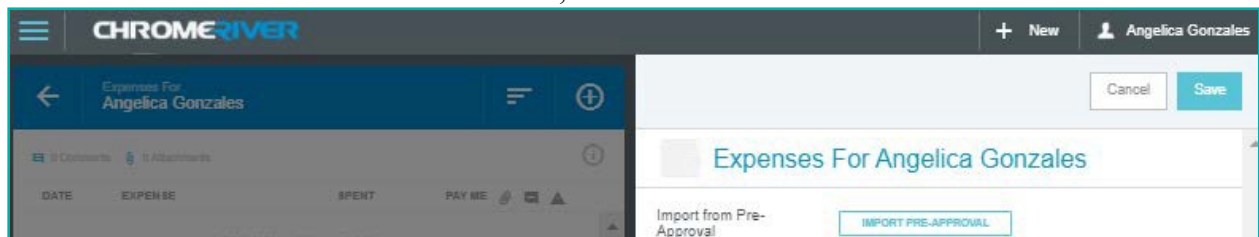
An Expense report creates the reimbursement payment. An Expense report must be created from an approved Pre-Approval report. Expense reports must be submitted within 60 days from the traveler's return date.

Create a New Expense Report

1. Click New, and select New Expense Report



2. The Expense entry screen will appear. Click IMPORT PRE-APPROVAL, select the desired Pre-Approval report, then click Import to populate the report. Verify all information on the header is correct, then click Save



Cancel

Save



Expenses For Angelica Gonzales

Report Name	<input type="text" value="AGonzales_Chrome River"/>
Pay Me In	<input type="text" value="USD - US Dollars"/>
Trip Type	<input type="text" value="In District"/>
Purpose	<input type="text" value="Training / Profe..."/>
Trip Start	<input type="text" value="05/01/2020"/>
Trip End	<input type="text" value="05/01/2020"/>
College Paid Items Exist	<input checked="" type="checkbox"/>
Estimated Total of Pcard items related to this trip	<input type="text" value="0"/>
Description of Pcard items related to this trip <small>Optional</small>	<input type="text"/>
Actual Amount of Pcard items related to this trip	<input type="text" value="0"/>

+ New
Angelica Gonzales

Estimated Total of check request related to this trip

Describe items related to this trip to be paid by check request
Optional

Actual Amount of check request related to this trip

Estimated Total of College Paid Items

Actual Total Amount of all college paid items related to this trip

Origination

Destination


Fiscal Year

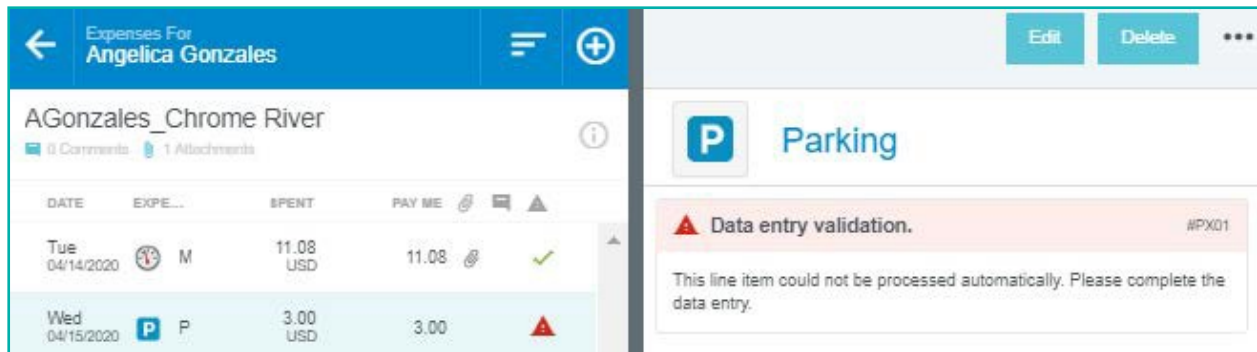
Pre-Approval Expense Summary


Pre-Approval Report Applied

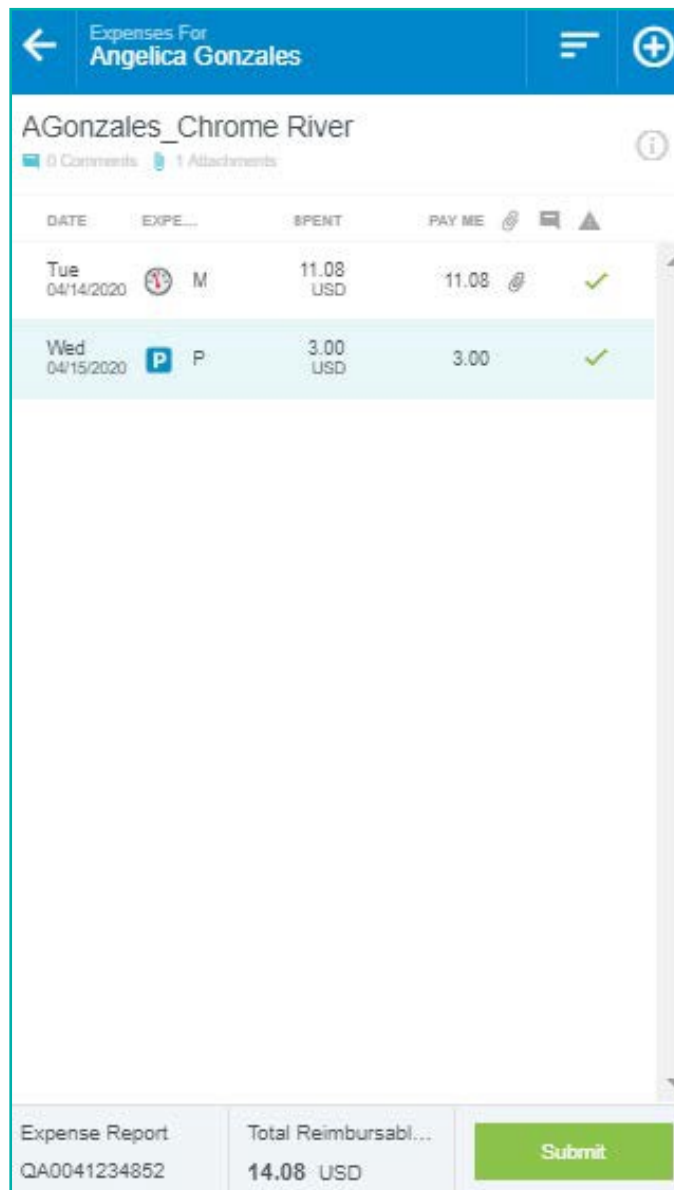
✕ [AGonzales_Chrome River](#)

	REMAINING (USD)	SPENT (USD)
Mileage	11.08	0.00
Parking	3.00	0.00
Total	14.08	0.00

3. Validate expenses with Violation warning . Click the expense, click Edit, make necessary edits and/or upload necessary attachments, click Save. Expenses \$5.00 or more require receipts



- After validating expenses, the status will change to Validated . When all expenses are validated, click Submit



- If you need to add more expenses, click + to expand the expense types list. When you are done adding expenses, click Submit

DATE	EXPENSE	SPENT	PAY ME
Fri 04/03/2020	Rental Car Fuel	25.00 USD	25.00 ✓
Fri 04/03/2020	Parking	4.00 USD	4.00 ✓

Expense Report QA0041063466 Total Reimbursable Amount **29.00 USD** [Submit](#)

Track an Expense Report

A submitted Expense report can be tracked by going to the traveler's dashboard.

1. On the traveler's dashboard, click Submitted Expenses

Expenses

2 Draft 0 Returned 1 Submitted Last 90 Days

Pre-Approval

2 Draft 0 Returned 4 Submitted Last 90 days

Click Expenses

2. You will see the traveler's Expense reports and their status. Select the Expense report you want to track, then click Tracking

Report ID	Date	Amount (USD)	Status
mb test 22 QA0041877305	06/26/2020	101.00	EXPORTED
mb test 21 QA0041877304	06/26/2020	36.49	EXPORTED

mb test 22

Report Owner: Maureen Barisonek
Sr Staff Asst, Student Engagemt / @00341395 / mbarisonek / mbarisonek@fsw.edu

3. After clicking Tracking, you will be able to see where/who the report is assigned to

Tracking for mb test 22

EXPENSE TYPE	AMOUNT (USD)	STATUS	CURRENTLY ASSIGNED
Incidentals	3.00	Exported	ExportAutobot:Firmwide
Per Diem	40.00	Exported	ExportAutobot:Firmwide
Car Rental	10.00	Exported	ExportAutobot:Firmwide
Registration Fees	16.00	Exported	ExportAutobot:Firmwide
Hotel	21.00	Exported	ExportAutobot:Firmwide
Per Diem	6.00	Exported	ExportAutobot:Firmwide
Rental Car Fuel	5.00	Exported	ExportAutobot:Firmwide

Routing Steps

Step Number	8
Assigned To	ExportAutobot: Firmwide, ExportAutobot: Firmwide
Approver	Auto Bot (Invoice Creation)
Assigned Date	06/26/2020 03:45 PM
Step Status	Approved
Completed Date	06/26/2020 03:47 PM
Completed By	ExpenseAPI

Recall an Expense Report

A submitted Expense report can be recalled as long as it has not been fully approved. The recall button will not function for Expense reports with approved or exported status.

1. On the traveler's dashboard, click Submitted Expenses

The screenshot shows two sections of the dashboard. The top section, titled "Expenses", displays three categories: "Draft" with a count of 2, "Returned" with a count of 0, and "Submitted Last 90 Days" with a count of 1. A purple arrow points to the "Submitted Last 90 Days" category with the text "Click Expense". The bottom section, titled "Pre-Approval", displays three categories: "Draft" with a count of 2, "Returned" with a count of 0, and "Submitted Last 90 days" with a count of 4.

2. Select the report you want to recall, click Recall

The screenshot shows a table of "Submitted Expense Reports". The table has columns for report ID, date, amount, and status. A "Recall" button is visible in the top right corner of the table area.

Report ID	Date	Amount	Status
FTMVEND TEST GA0042800103	10/01/2020	12.52 USD	PENDING

3. Click Yes to confirm you want to recall the report

The screenshot shows a dialog box titled "Recall This Report?". The message inside says "This report will be moved to the draft list." There are two buttons: "No" and "Yes". The "Yes" button is highlighted with a red box.

- The report can be found on the traveler's Draft Expenses. It will retain any notes entered during the incomplete approval process

The dashboard shows two main sections: **Expenses** and **Pre-Approval**. Each section has three status categories: Draft, Returned, and Submitted Last 90 Days.

Section	Draft	Returned	Submitted Last 90 Days
Expenses	2	0	1
Pre-Approval	2	0	4

An arrow labeled "Click Expenses Drafts" points to the "2 Draft" count in the Expenses section.

- To edit the report, click Open, then click Edit. After editing, click Submit on the left. To delete a line item, select the line item, click delete. To delete the report, click delete

This screenshot shows a list of draft expense reports. The selected report is "FTMVEND TEST" with a date of 10/01/2020 and a total amount of 12.52 USD. Action buttons for "Open", "Delete", "PDF", and "Submit" are visible.

Report Name	Date	Amount	Status
FTMVEND TEST	10/01/2020	12.52 USD	✓

This screenshot shows the detailed view of the "FTMVEND TEST" expense report for Angelica Gonzales. It includes a table of line items, a summary of report details, and a pre-approval summary.

DATE	EXPENSE	SPENT	PAY ME
Wed 08/26/2020	Mileage	7.52 USD	7.52 ✓
Wed 08/26/2020	Parking	5.00 USD	5.00 ✓

Report Details:

- Report Name: FTMVEND TEST
- Pay Me In: USD - US Dollars
- Trip Type: In District
- Purpose: Training / Professiona...
- Trip Start: 08/26/2020
- Trip End: 08/26/2020
- College Paid Items Exist:
- Origination: United States / Florida / ...
- Destination: United States / Florida / ...
- Fiscal Year: FY21

Pre-Approval Expense Summary:

- Pre-Approval Report Applied: FTMVEND TEST

Summary: Expense Report QA0042900103, Total Reimbursable Amount 12.52 USD, Submit button.

Returned Expense Report

When an approver returns an Expense report, it will appear in the Returned Expenses. The traveler and delegate are notified via email.

1. On the traveler's dashboard, click Returned Expenses

The dashboard is divided into two main sections: 'Expenses' and 'Pre-Approval'. Each section has three columns representing different report statuses: Draft, Returned, and Submitted (Last 90 Days). In the 'Expenses' section, there are 2 Draft reports, 0 Returned reports, and 1 Submitted report. A callout box with a left-pointing arrow highlights the 'Returned' count, containing the text 'Click Expenses Returned'. The 'Pre-Approval' section shows 2 Draft reports, 0 Returned reports, and 4 Submitted reports.

Section	Draft	Returned	Submitted (Last 90 Days)
Expenses	2	0	1
Pre-Approval	2	0	4

2. Select the report to view the approver's comment at the bottom of the preview screen

The screenshot shows a 'Returned Expense Reports' interface. On the left, a report titled 'MB_Test_052620' is displayed with a value of '1.41 USD' and a green checkmark. On the right, there are action buttons: 'Open', 'Delete', 'PDF', and 'Submit'. Below these buttons, the report's history is shown, including an approval by 'Auto Bot (Budget Checker)' on 05/26/2020 at 03:48 PM with the comment 'Approved 1-2SLADM--60501-- 1.41: (Mileage) available', and a return by 'Angelica Gonzales' on 05/26/2020 at 03:52 PM with the comment 'test return'.

Approved and Exported Expense Report

An approved Expense report had been approved by all approvers, but has not yet been exported. An exported Expense report has been sent to payment processing.

1. On the traveler's dashboard, click Submitted Expenses

Expenses

2 Draft	0 Returned	1 Submitted Last 90 Days
------------	---------------	--------------------------------

Pre-Approval

2 Draft	0 Returned	4 Submitted Last 90 days
------------	---------------	--------------------------------

2. You will see the traveler's Expense reports and their status

Submitted Expense Reports		
AGonzales_ER Test QA0041235655	04/18/2020	1.34 USD EXPORTED
AGonzales_Chrome River QA0041234852	04/15/2020	14.08 USD EXPORTED

3. Select the Expense report to find the Invoice number at the bottom of the preview screen

Comments (3)

Auto Bot (Budget Checker) 04/18/2020 10:39 AM
Approved
1-FIN8---60501--- 1.34: (Mileage) available

Auto Bot (Budget Checker) 04/20/2020 11:24 AM
Approved
1-FIN8---60501--- 1.34: (Mileage) available

Auto Bot (Invoice Creation) 04/20/2020 11:25 AM
Invoice **10280043** successfully created in Banner.

Receipt Upload

Chrome River SNAP

Chrome River's SNAP app enables users to easily capture, and upload receipt(s) right when the expense occurs. Users simply snap a photo of the receipt using the app, and it will be uploaded directly to their Receipt Gallery and eWallet. It is very important to use the same email address associated with your Chrome River account for the system to recognize, and store the receipt in your account.

Upload a Photo with CR SNAP app for Android and iOS

1. Download Chrome River SNAP. First-time users will need to enter an email address, and you will receive a verification code to enter in CR SNAP. Once your account has been set up, you can upload receipt(s)
2. Hold your mobile device over the receipt, and tap the gray circle at the bottom of the screen.



Note: The screenshots on the left were taken with an Android device, while the screenshots on the right were taken with an iOS device.

3. If the receipt image is in frame and in focus, tap UPLOAD. Otherwise, tap Discard



- 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



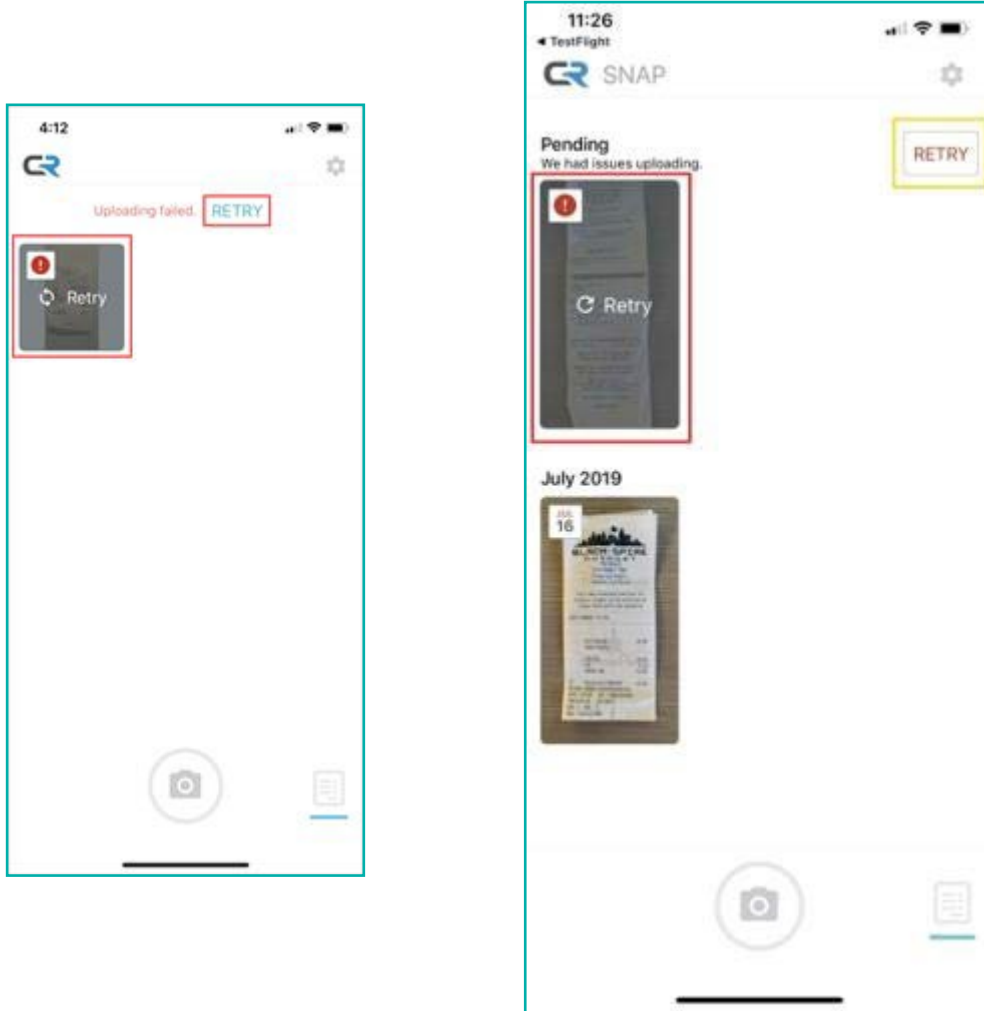
5. If you have selected "Delete Receipts After Upload" in Settings, the receipt will only appear until it has uploaded to Chrome River



6. Otherwise, this screen is your Upload History, where you may see all the receipts you have previously uploaded



7. If a connectivity issue causes the upload to fail, tap the image thumbnail or the word RETRY to resend the receipt image



Email Receipt

Plain Text Receipt – You can email any receipt to receipt@chromefile.com. You must use the same email address associated with your Chrome River account for the system to recognize, and store the receipt in your account. The receipt will be available within E- Wallet’s Offline and Receipt Gallery tabs. Only JPG, PDF, PNG, and TIFF files of at least 50 KB and no more than 10 MB can be accepted, and the combined size of all files uploaded to a single report may be no larger than 100 MB.

To email a receipt, draft a new message containing the following information:

To: receipt@chromefile.com – When the file is received in Chrome River, you will receive a confirmation email from expense-noreply@chromefile.com.

Subject: xx.xx – The Subject line should be the amount of the expense with no symbols. If you do not put the expense amount on the Subject line, the amount will be 0.00 when the expense appears in Chrome River.

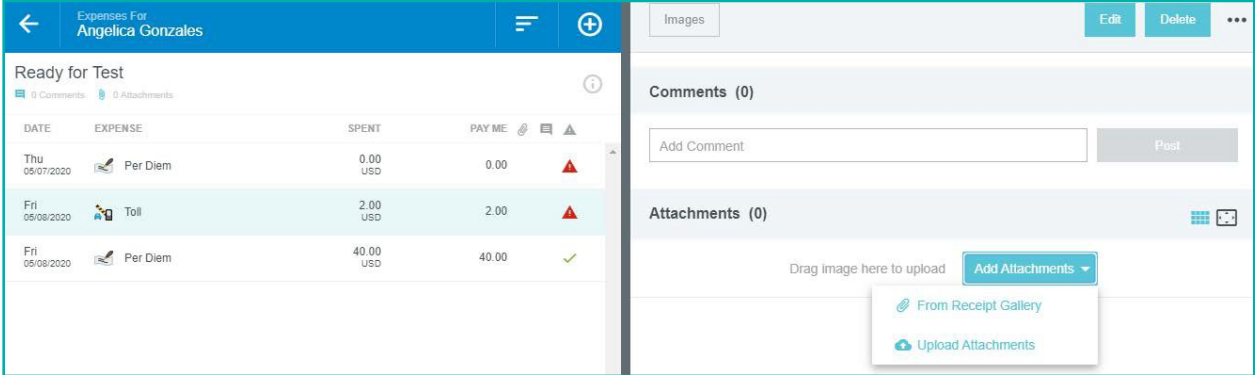
Body: Description of expense – The body should contain the description of the expense. It will appear in the Description section of any PDF reports generated.

HTML Receipt – You can forward HTML email confirmation or receipt for an expense directly to receipt@chrome.com to have it converted to a receipt image. You must use the

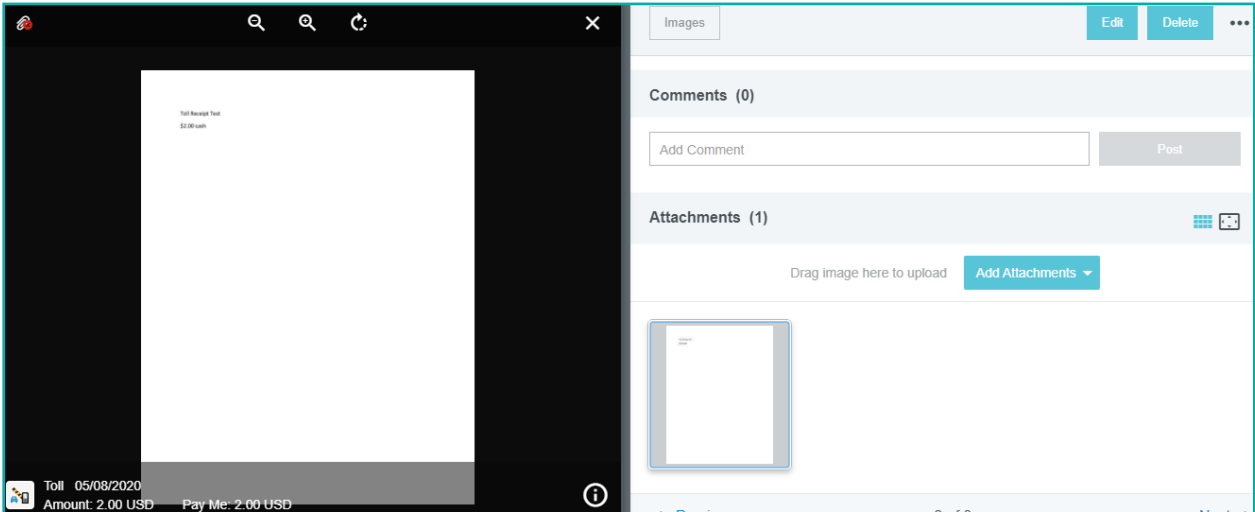
same email address associated with Chrome River account for the system to recognize, and store the receipt in your account. The PDF created from the HTML email you forwarded will be in the E-Wallet Offline tab.

Upload from Desktop – You can go into the Expense report you need to expense, and upload receipt per expense line item.

- 1. Once you are in the report, click the expense line item you want to upload receipt to. Click Add Attachments, then click Upload Attachments to upload from your desktop



- 2. Once the file has been uploaded, you can preview, zoom in and out, and rotate the attachment



Warnings and Violations

If there are any issues with a report, warnings and/or violations will appear for guidance and will need to be addressed before submitting a report.

Warnings indicate that additional information is required before submitting the report for approval. Respond by either modifying the data or replying to the warning.

If a response is required, click Enter Response in the message box, and enter a response. Click Save to update, and close warning message.

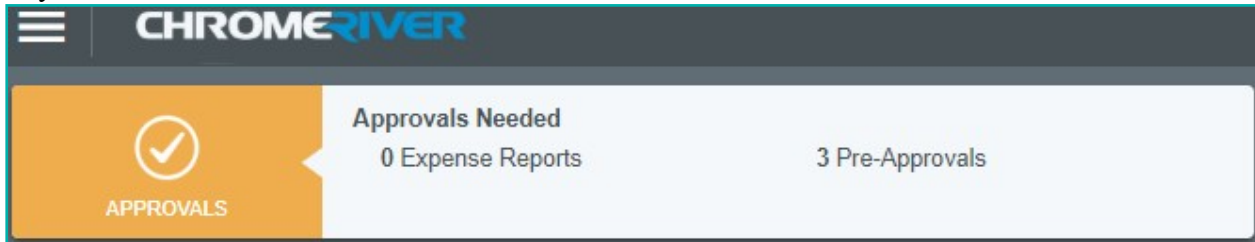
Violations indicate that the report cannot be submitted for approval based on the Travel policies and will need to be corrected before submitting for approval.

If this type of message appears, the Submit button will be deactivated, and you will need to make the necessary changes before proceeding.

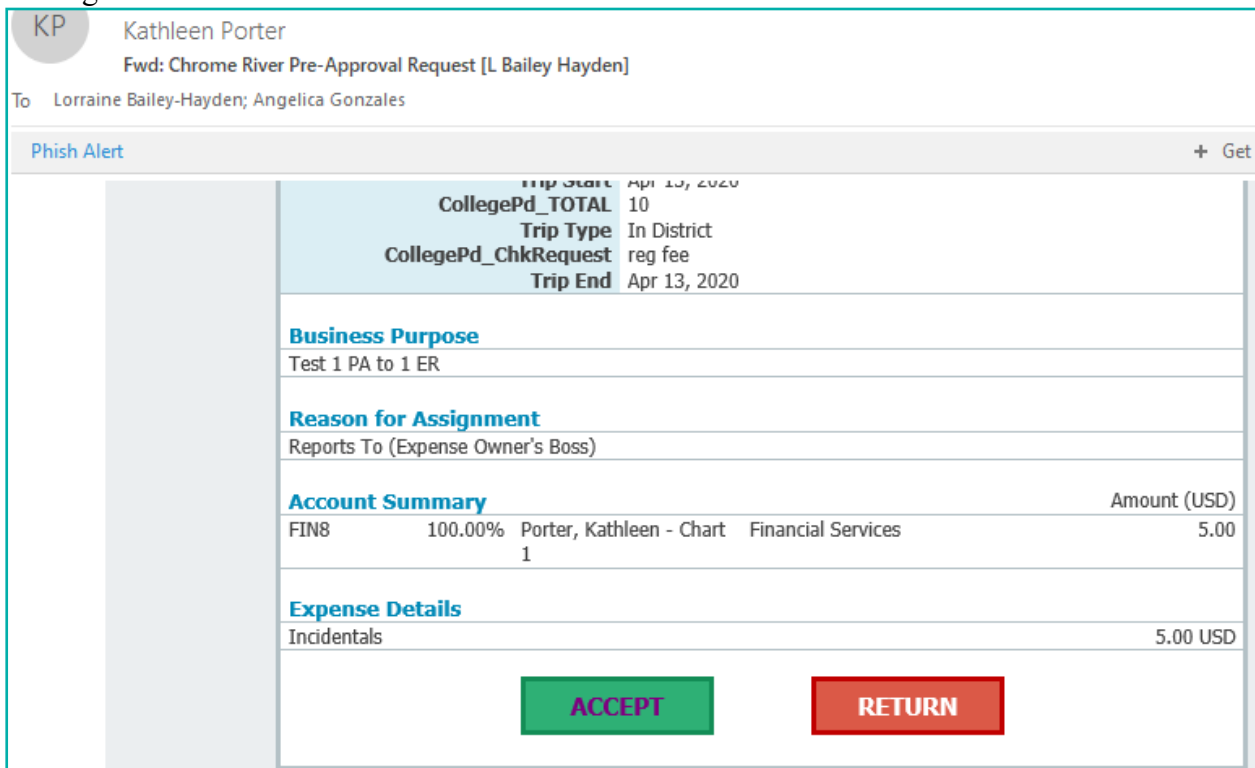
Report Approval

An approver may approve a report in Chrome River or via email.

In Chrome River, reports awaiting your approval will be in the orange notification bar at the top of your dashboard.

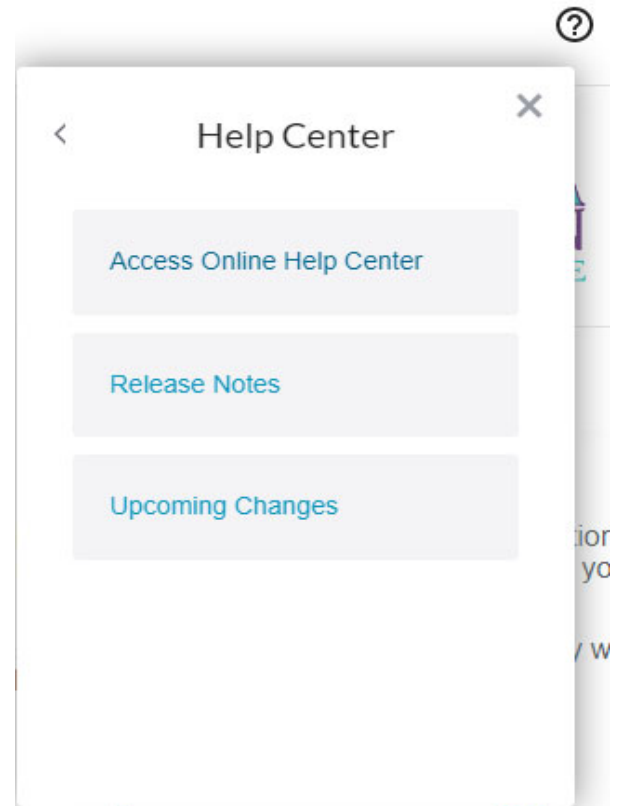
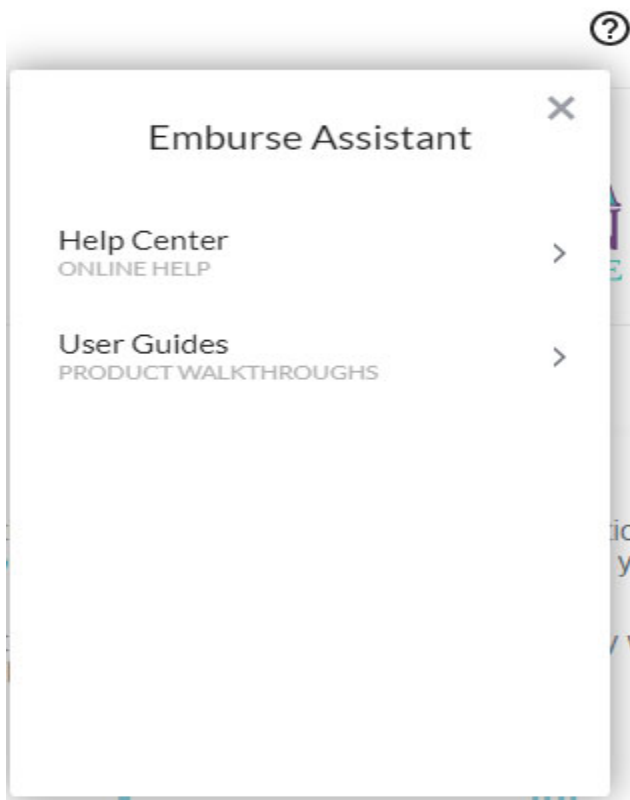
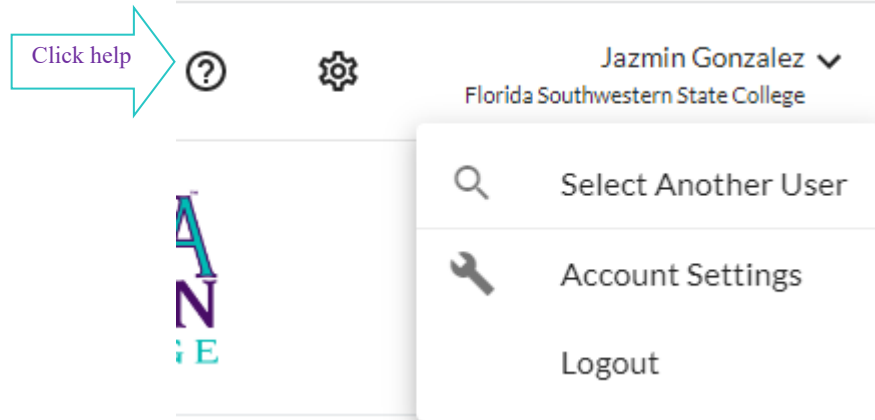


Via email, click ACCEPT or RETURN, and add any comments to the new email that opens, or forward the approval email to approve@preapproval.us.chromeriver.com or return@preapproval.us.chromeriver.com with any comments at the top of the forwarded message.



Chrome River Help Center

1. Launch the Chrome River application from any web browser, <https://app.chromeriver.com/login/sso/saml?CompanyID=fsw.edu>
2. Click your name, then click Help



3. You will be prompted to a new window, Chrome River Help Center where you can watch video tutorials and/or review step by step visual instruction guides. The search bar allows you to search for keywords or phrases to find related resources

emburse
chromeriver

System Basics EXPENSE PRE-APPROVAL INVOICE PO ANALYTICS Admin

Welcome to the Help Center

How may we help?

Get Started!

Please enter your search term or keyword here.

Create a Report
Enter your expenses

Add Receipts
Attach report receipts

Create an Invoice
Enter data

Admin Quick-Start
Resources for new admins

Training & Education
Webinars + Best Practices

More Emburse Products
Emburse Help Center