FLORIDA SOUTHWESTERN STATE COLLEGE

Chrome River User Guide

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What is Chrome River?

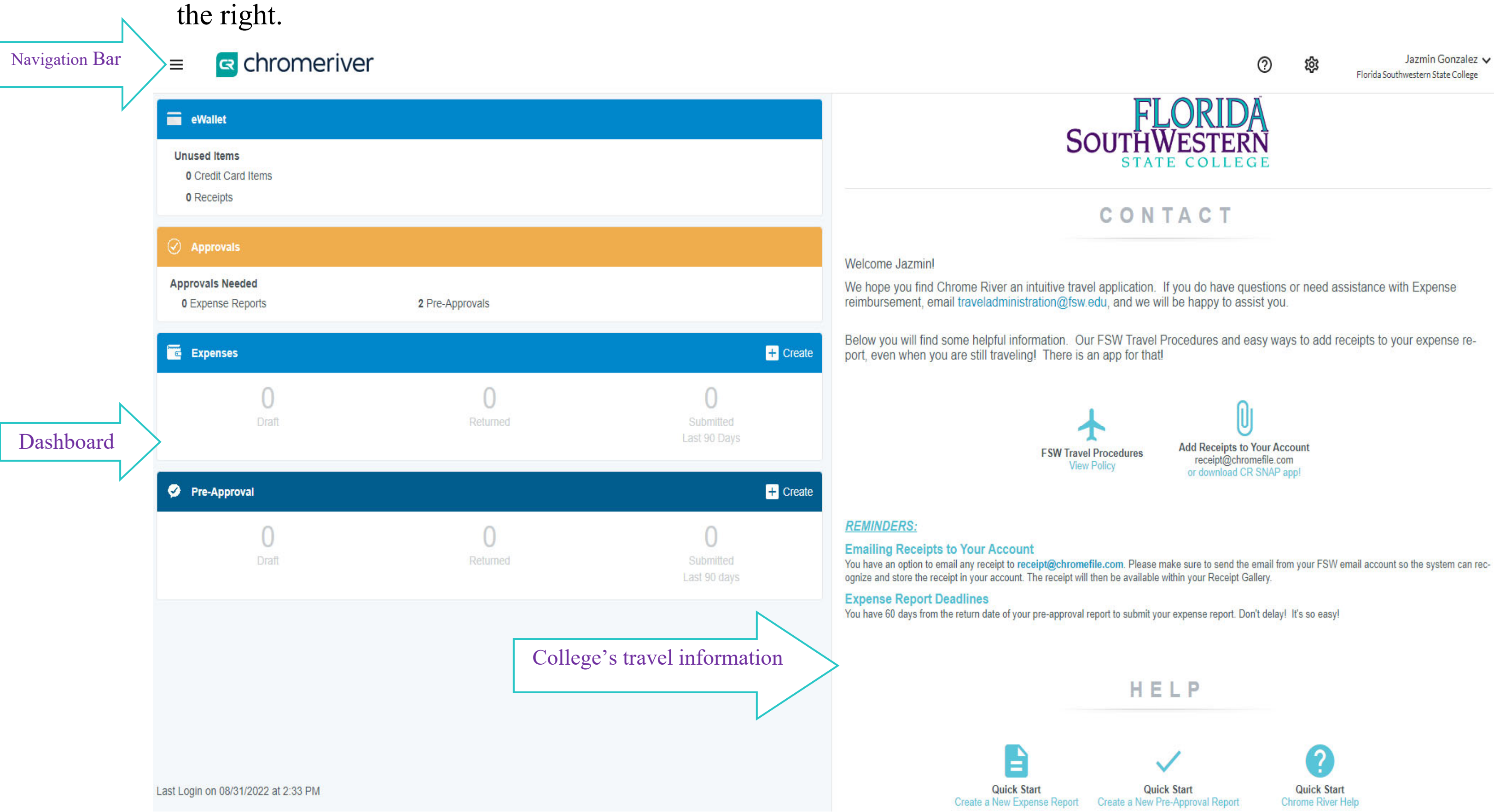
Chrome River is a user-friendly and mobile-friendly Travel and Expense Management System. Authorized users can access Chrome River anytime and on any device. Chrome River allows authorized users to submit Pre-Approval and Expense reports in an easy and efficient manner.

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.



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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.

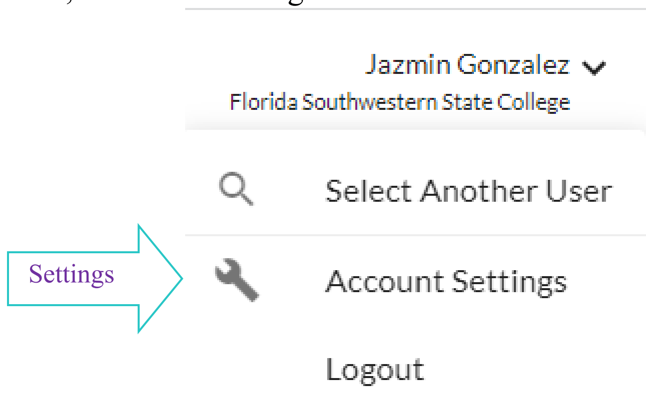
The College's travel information includes contact information, policies, announcements, and resources to navigate Chrome River.

Delegates

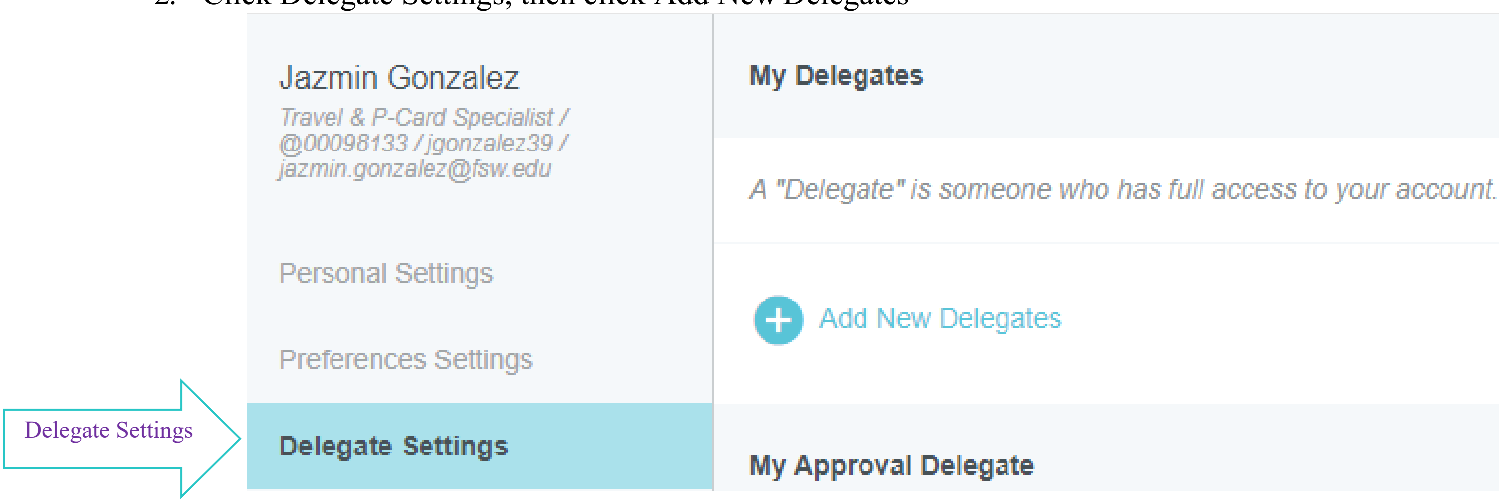
A delegate creates and submits Pre-Approval and Expense reports for another user and accesses their settings menu, home screen, and reports.

Authorize a Delegate

1. Click your name, then click Settings

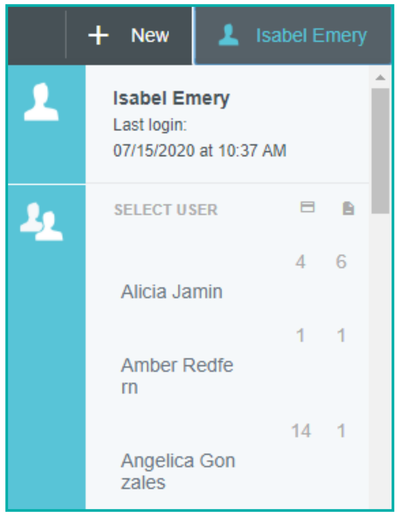


2. Click Delegate Settings, then click Add New Delegates



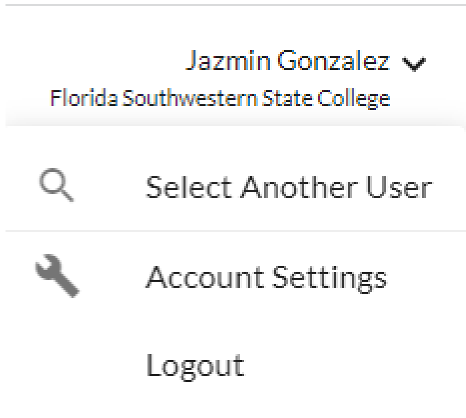
Work as a Delegate

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

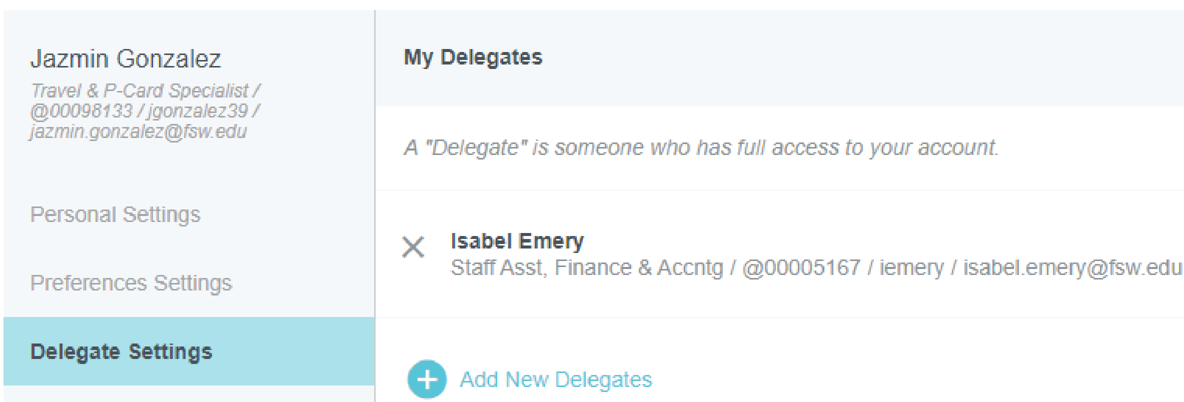


Remove a Delegate

1. Click your name, then click Settings



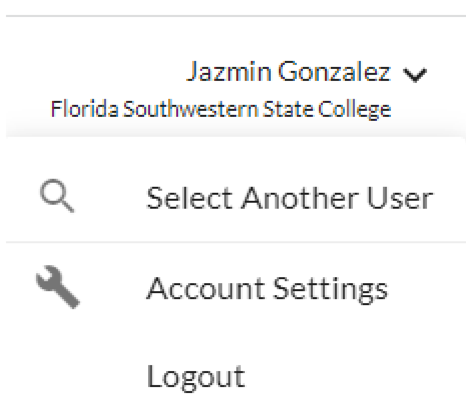
2. Click Delegate Settings, then click X next to the delegate's name



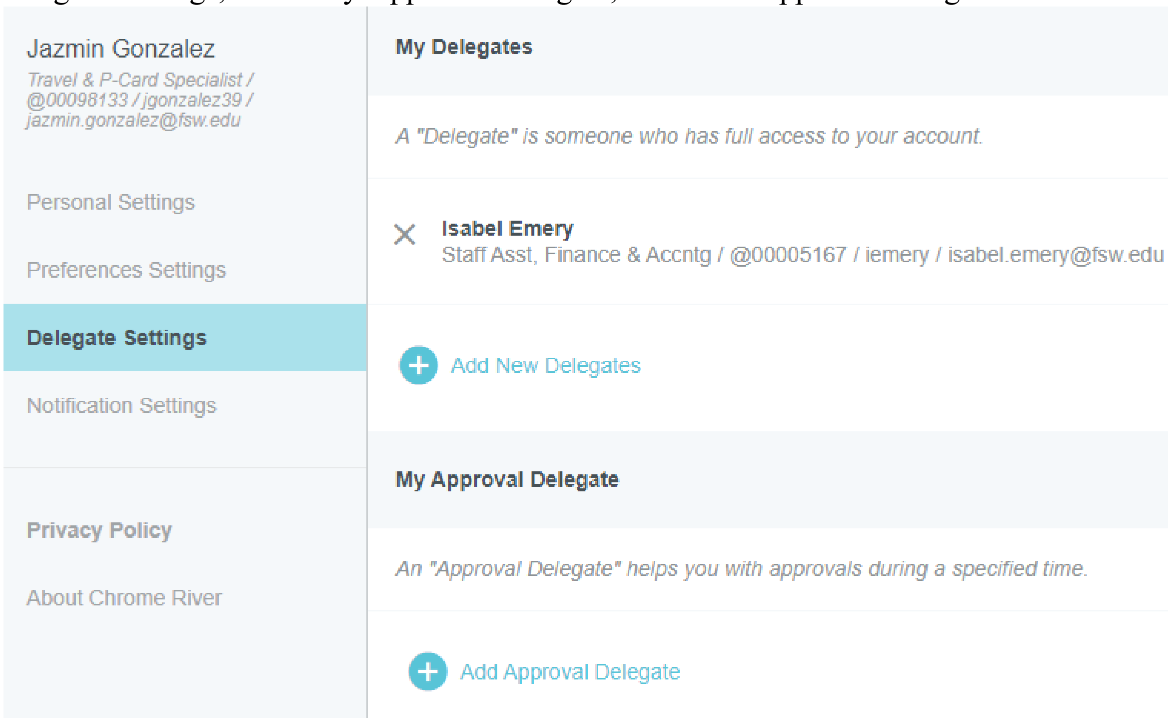
Authorize an Approval Delegate

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.

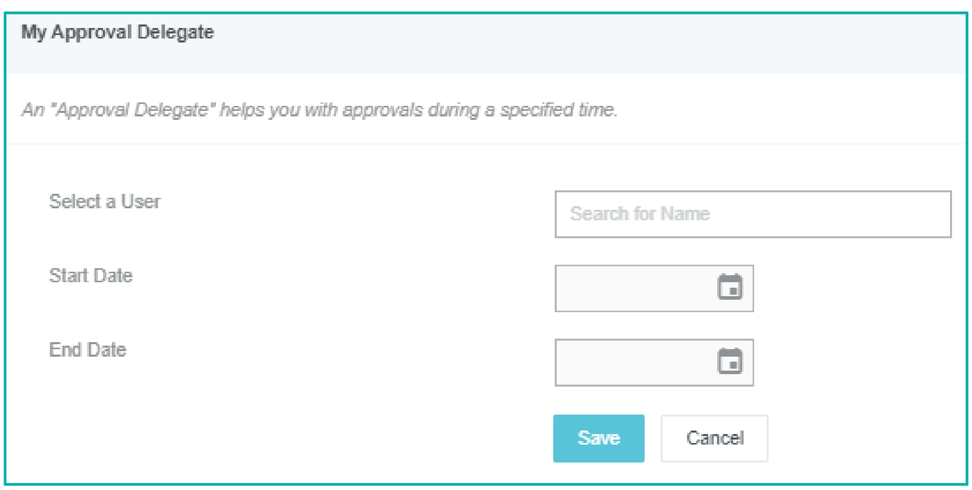
1. Click your name, then click Settings



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



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

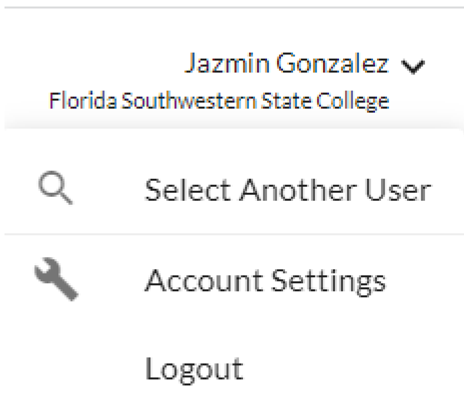


Chrome River will send an email to you and the approval delegate describing the routing changes that will occur during your specified period. All Pre-Approval and Expense reports assigned to you will automatically queue up for the approval delegate to approve.

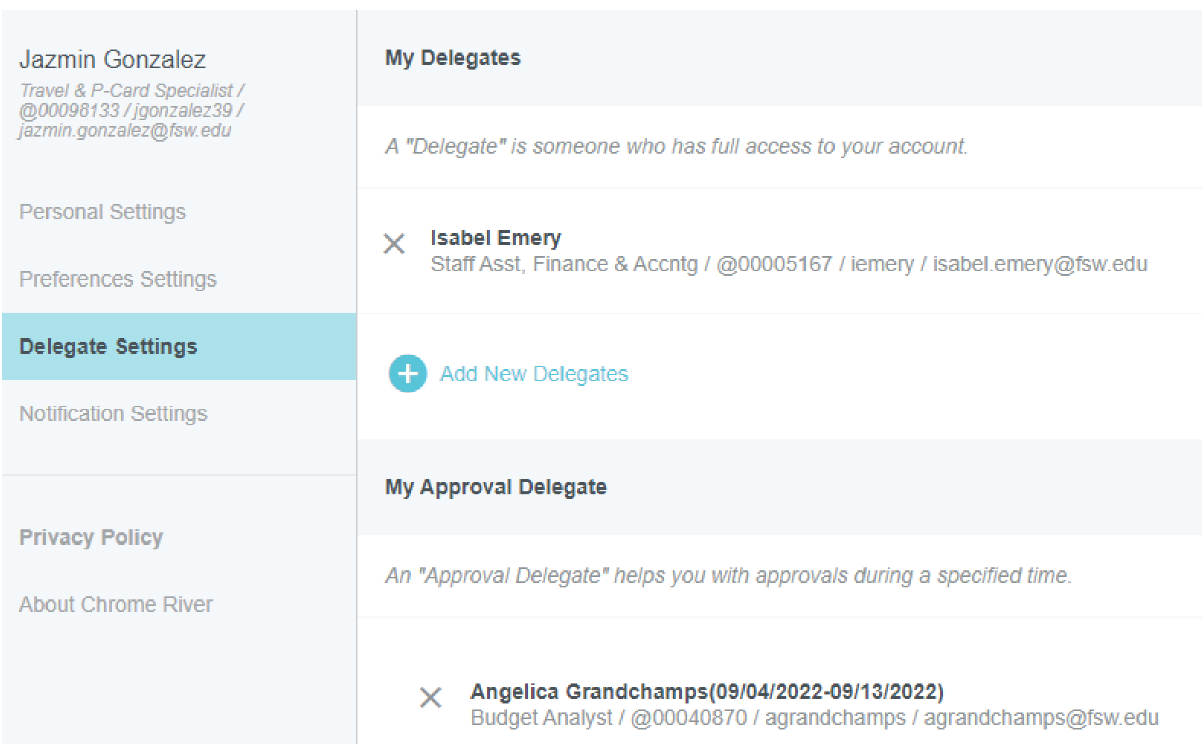
Remove an Approval Delegate

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

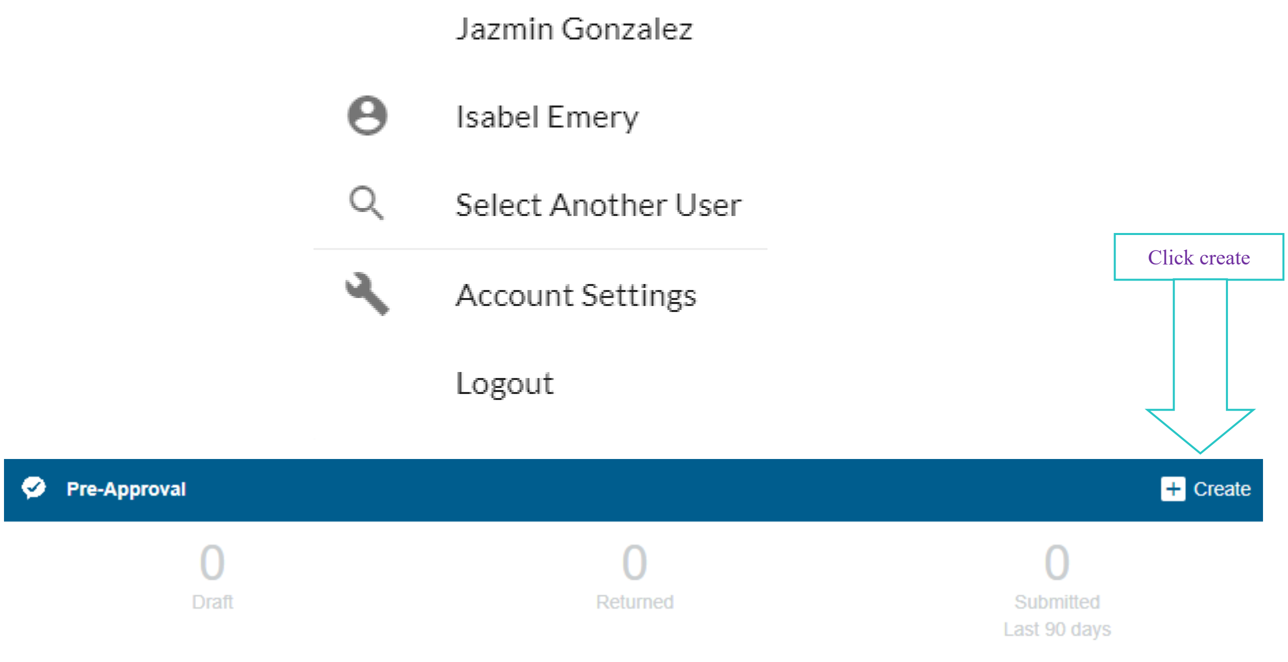


Pre-Approval Report

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.

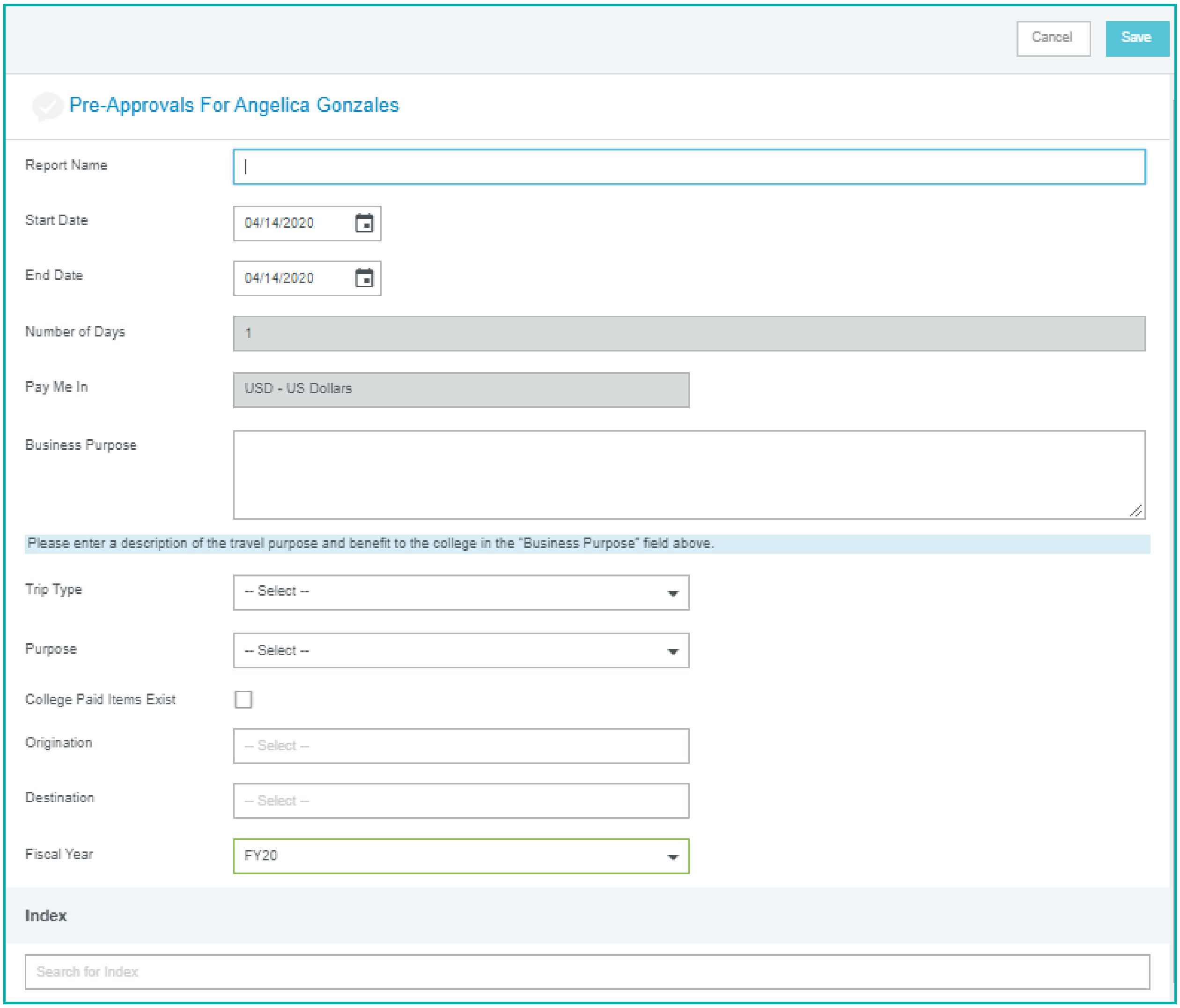
Create a New Pre-Approval Report

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



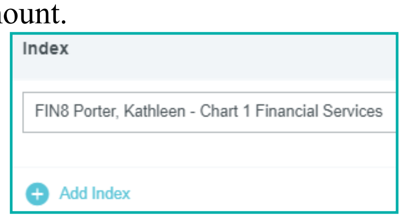
2. Complete the header with the following information:
    a. Report Name
    b. Start and End Date
    c. Business Purpose – Describe travel purpose and benefit to the College
    d. Trip Type
    e. Purpose
    f. College Paid Items (*If applicable*) – List items paid with Purchasing Card and Check Request(s)
    g. Origination and Destination
    h. Fiscal Year
    i. Index,

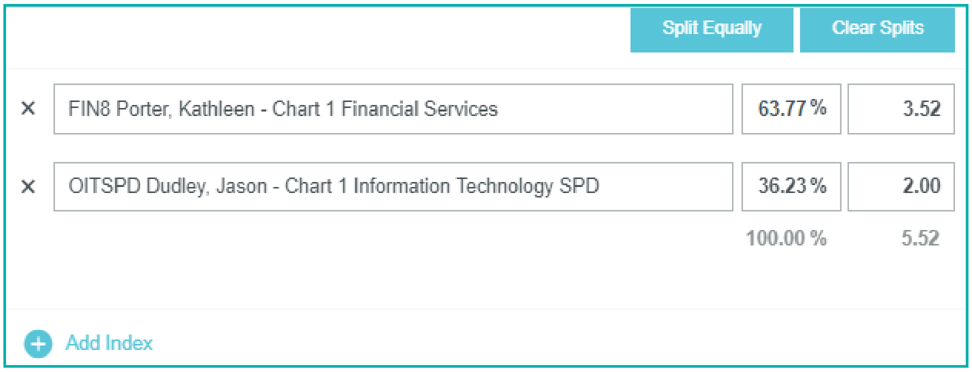
    then click Save



Note:

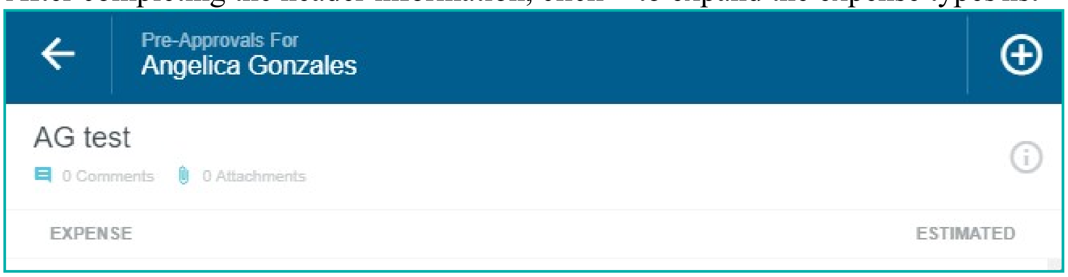
- If College paid items exist, click the College Paid Items Exist box, and enter the following information – amount(s), item(s) description, etc.
- If using more than one index, click Add Index. You may modify allocations by percentage or specific amount.



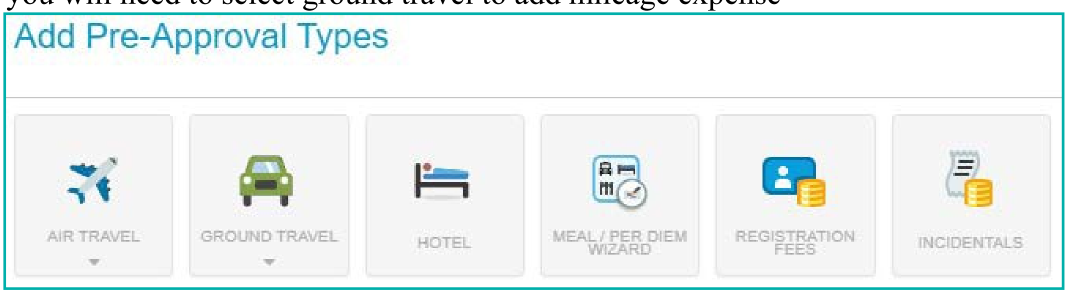


- Check out the “Allocation” video tutorial available in Chrome River Help Center for more information.

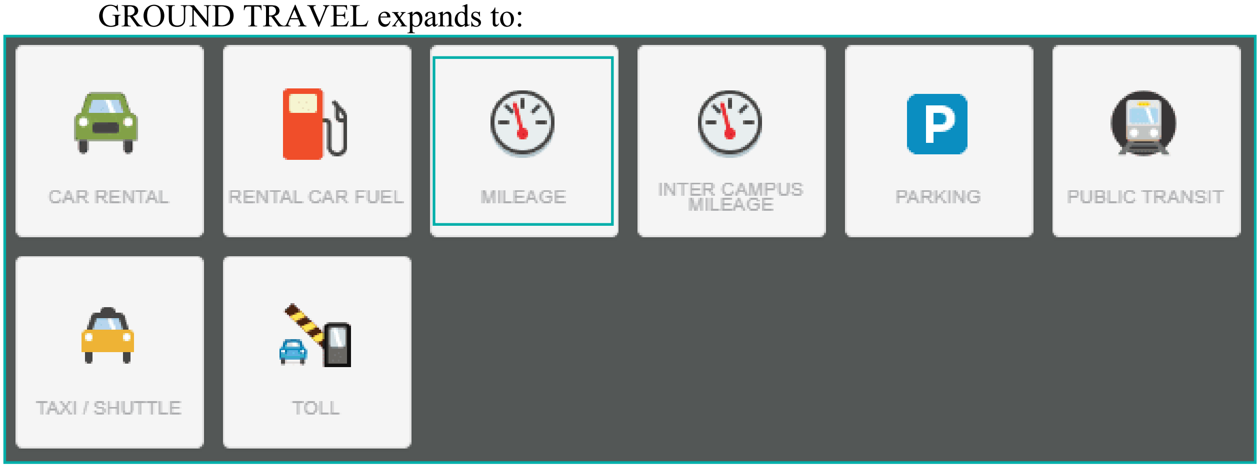
3. After completing the header information, click + to expand the expense types list



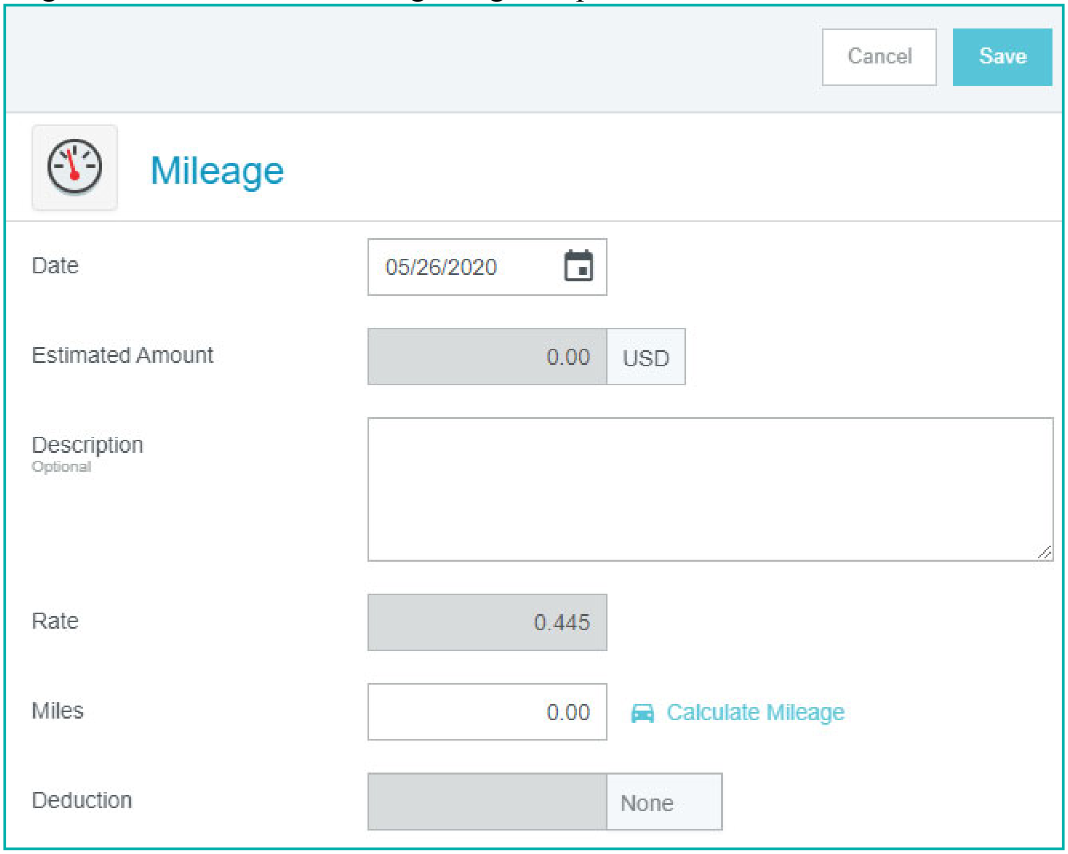
You may add potential expenses by choosing from the expense types list. For example, you will need to select ground travel to add mileage expense



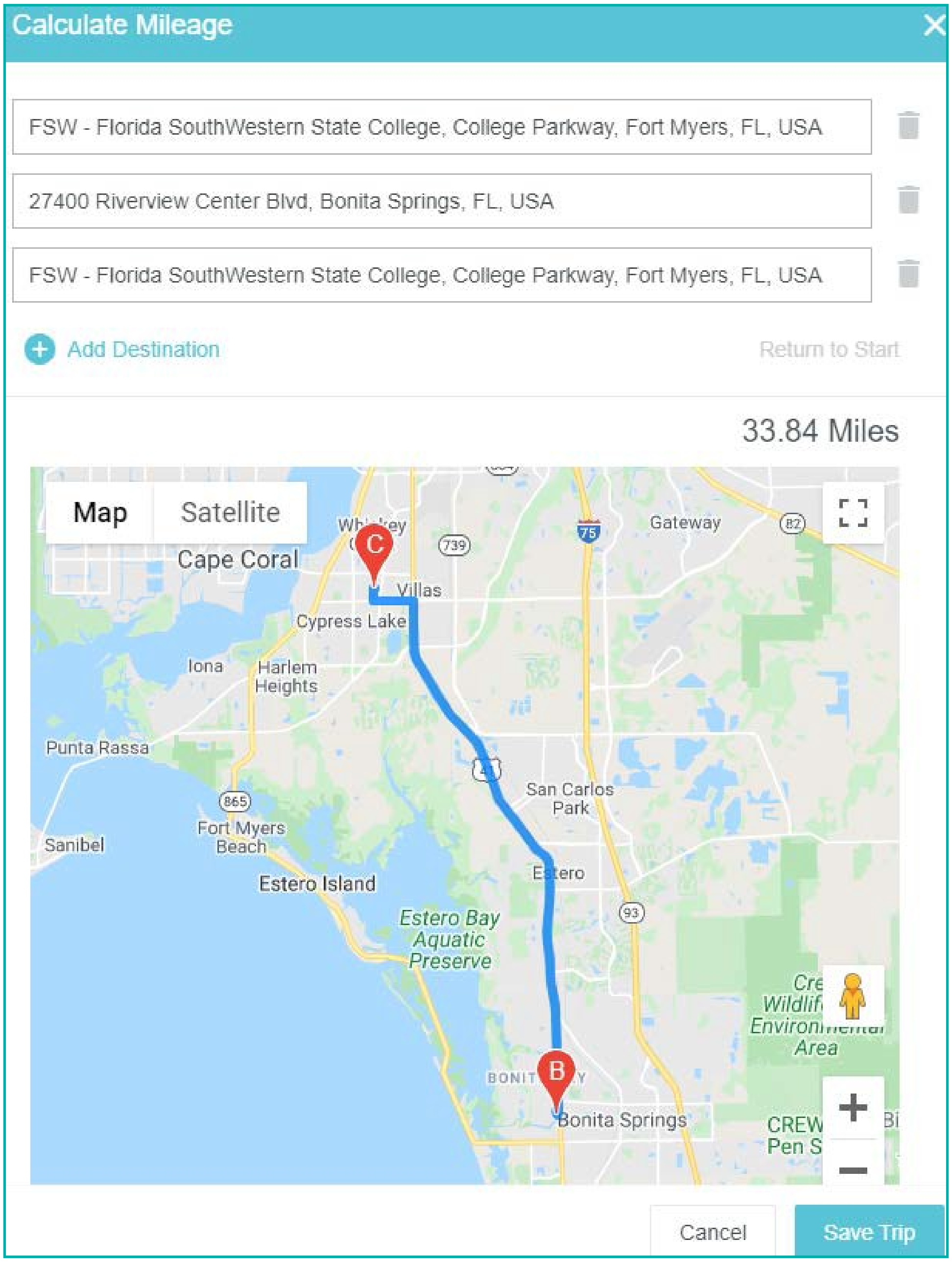
GROUND TRAVEL expands to:

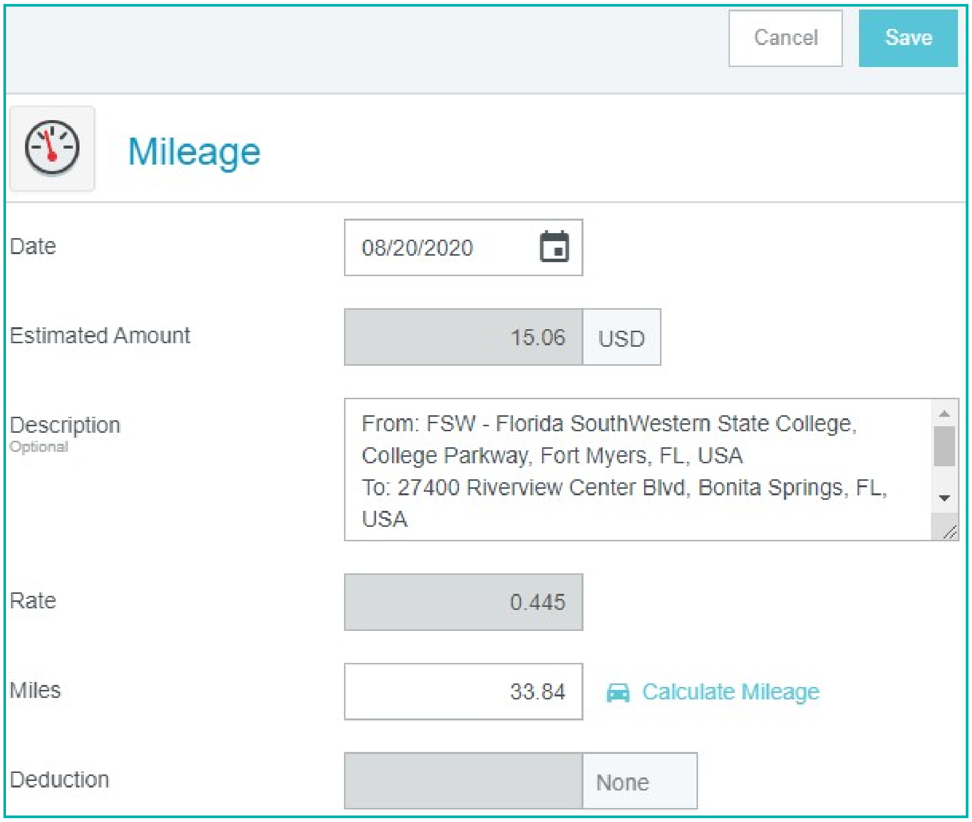


4. Click the mileage expense icon, then click Calculate Mileage where you will enter your origination and destination using Google Maps



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


Calculate Mileage
FSW - Florida SouthWestern State College, College Parkway, Fort Myers, FL, USA
27400 Riverview Center Blvd, Bonita Springs, FL, USA
FSW - Florida SouthWestern State College, College Parkway, Fort Myers, FL, USA
Add Destination
Return to Start
33.84 Miles
Map
Satellite
Cape Coral
Villas
Cypress Lake
Iona
Harlem Heights
Punta Rassa
Sanibel
Fort Myers Beach
Estero Island
Estero Bay Aquatic Preserve
San Carlos Park
Gateway
Bonita Springs
Cancel
Save Trip



Cancel
Save

Mileage

Date 08/20/2020

Estimated Amount 15.06 USD

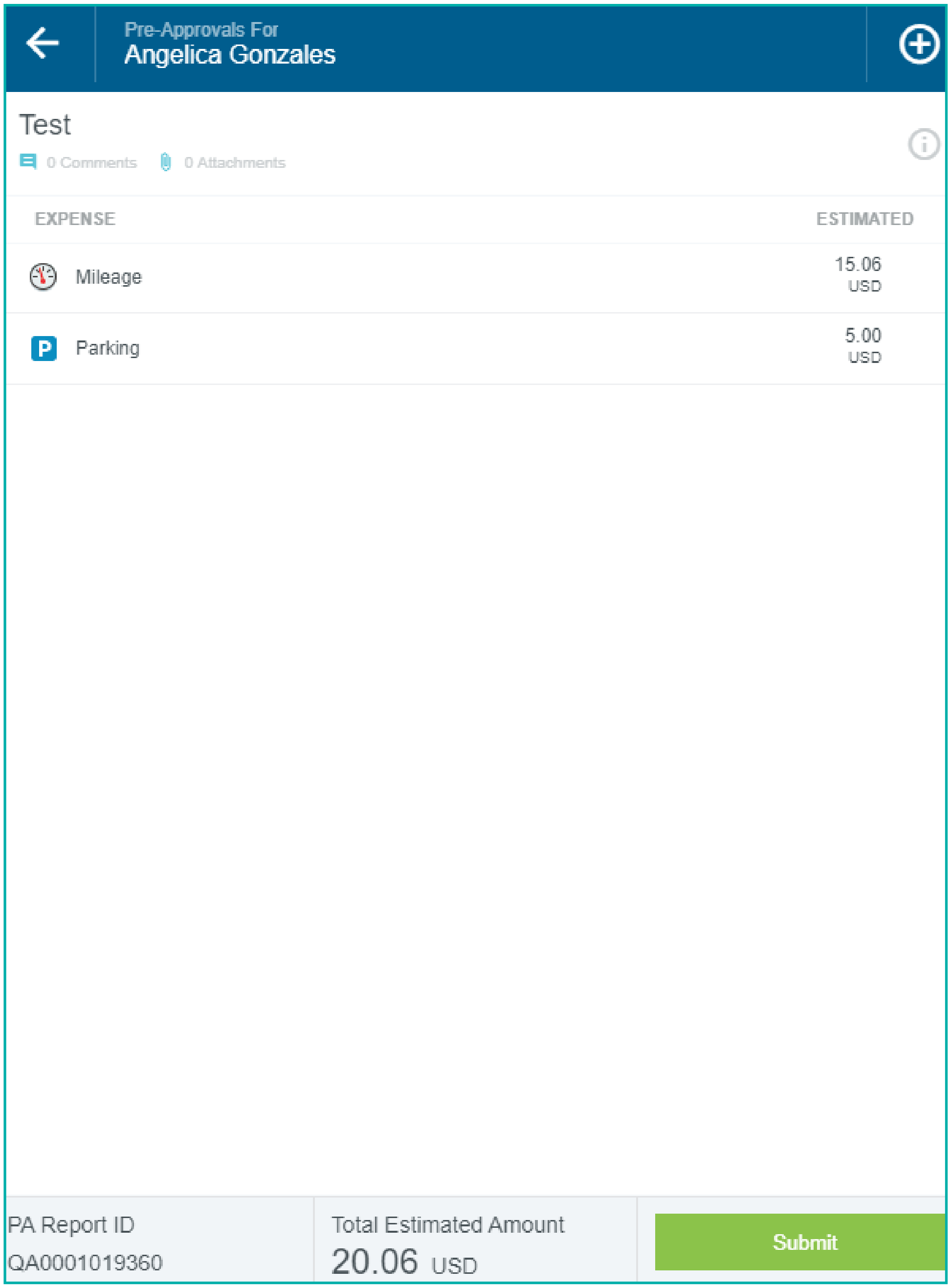
Description
Optional
From: FSW - Florida SouthWestern State College, College Parkway, Fort Myers, FL, USA
To: 27400 Riverview Center Blvd, Bonita Springs, FL, USA

Rate 0.445

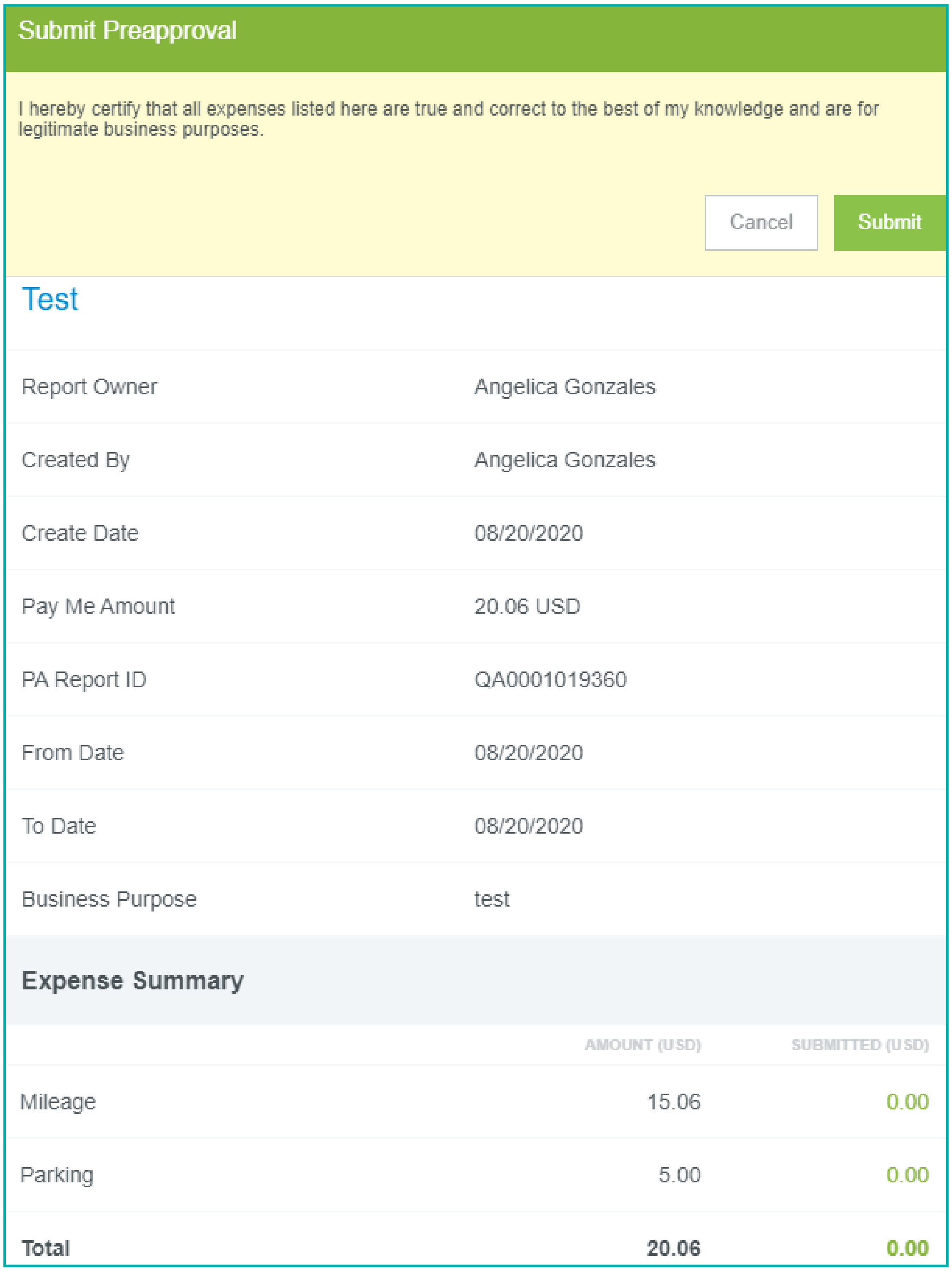
Miles 33.84 Calculate Mileage

Deduction None

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



7. 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.

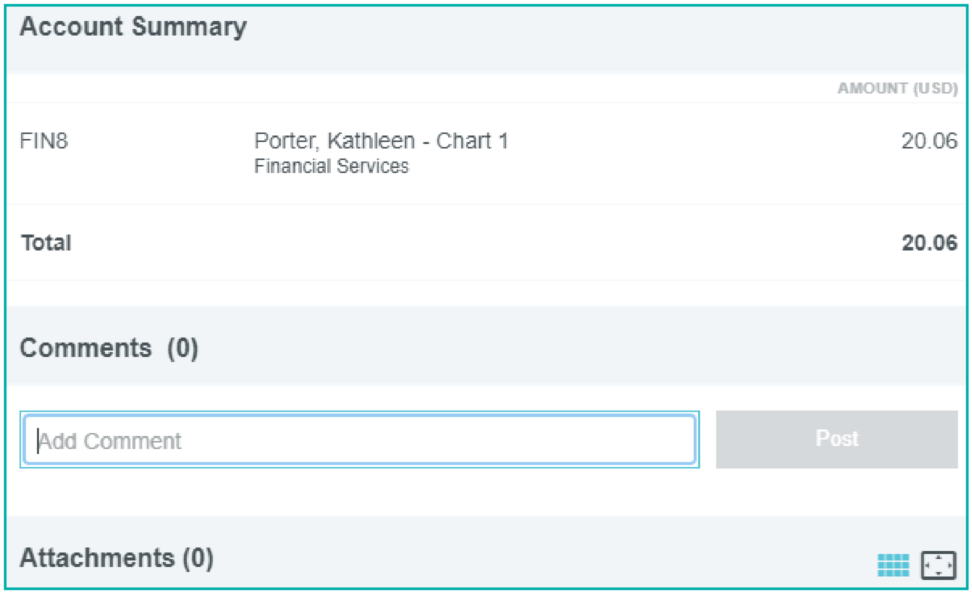
Cancel Submit

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

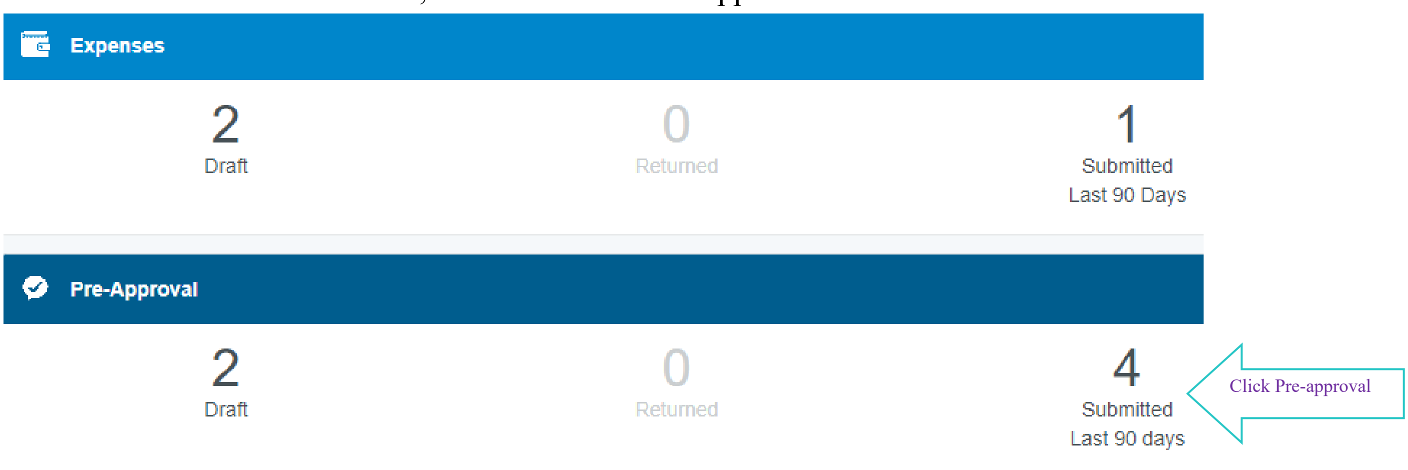
	AMOUNT (USD)	SUBMITTED (USD)
Mileage	15.06	0.00
Parking	5.00	0.00
Total	**20.06**	**0.00**



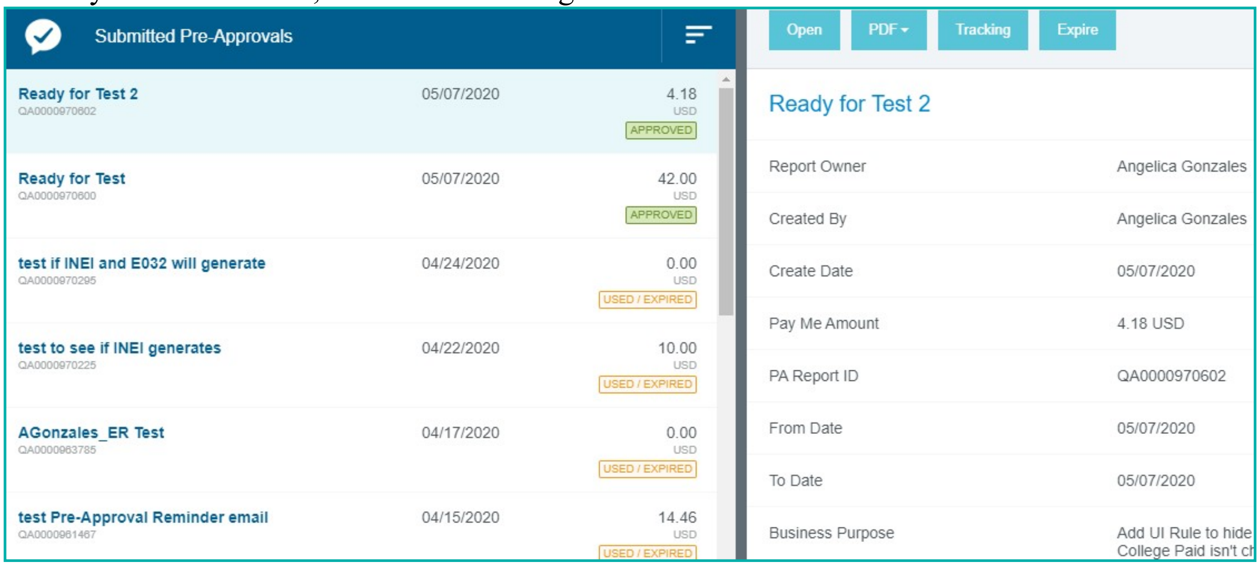
Track a Pre-Approval Report

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

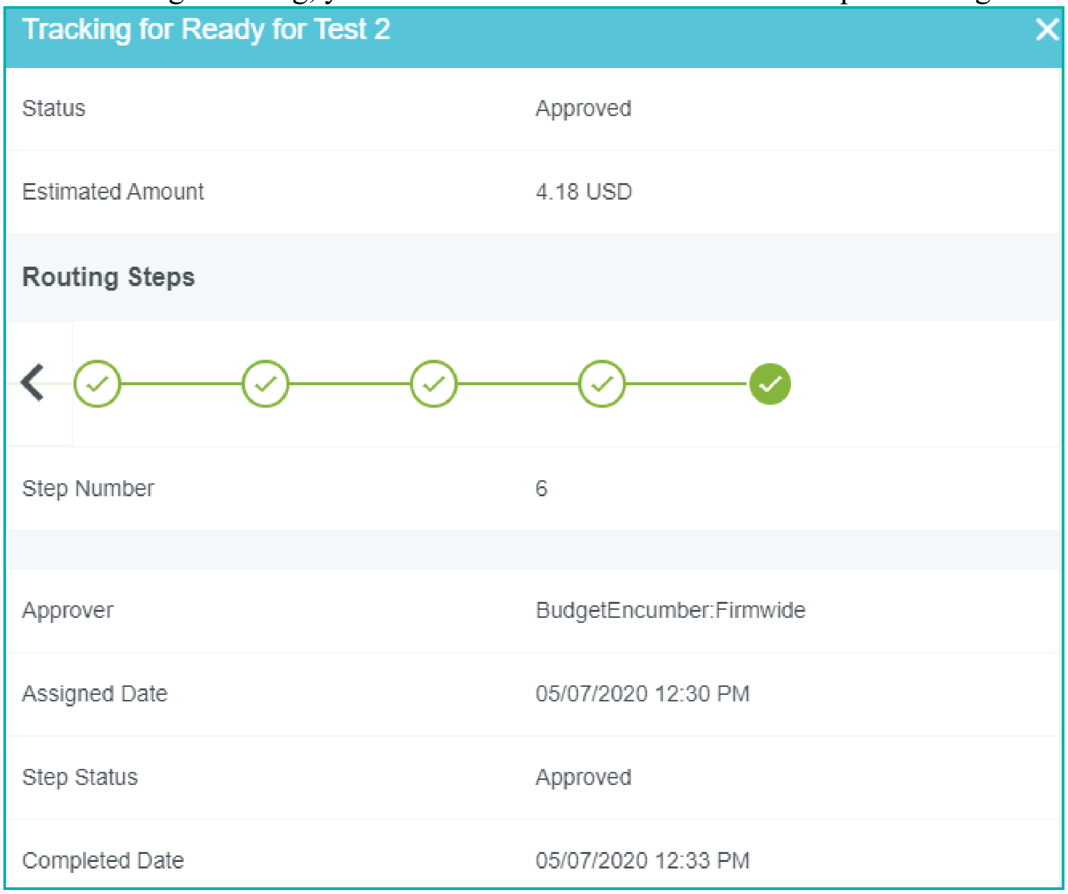
1. On the traveler's dashboard, click Submitted Pre-Approval



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



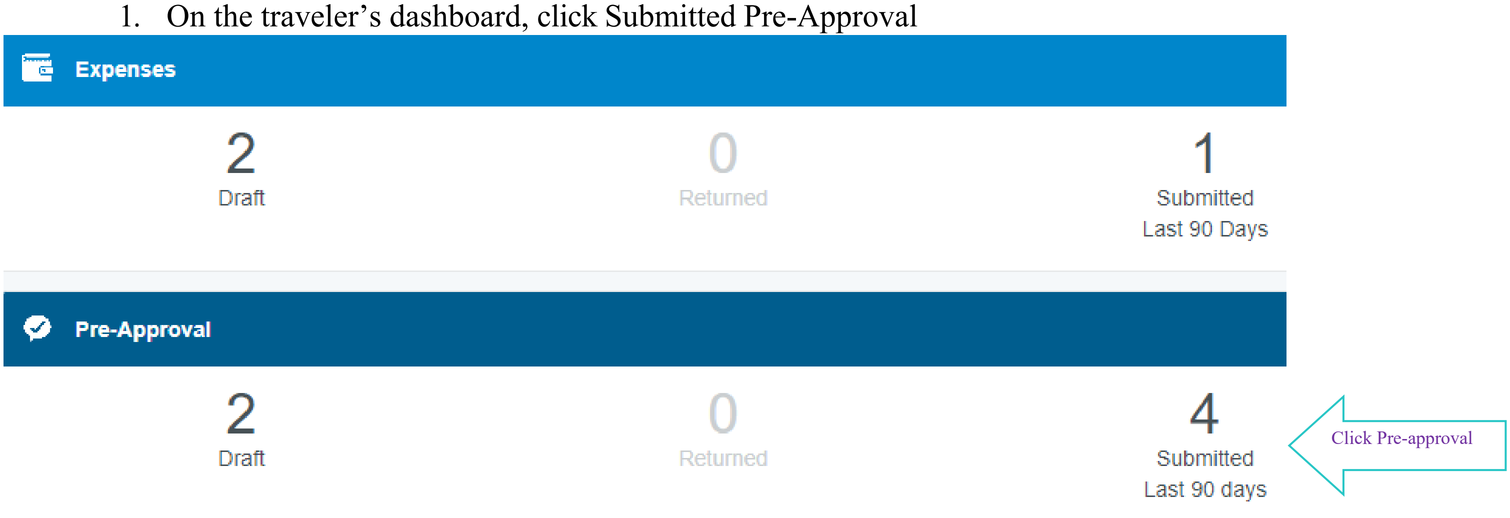
3. After clicking Tracking, you will be able to see where/who the report is assigned to



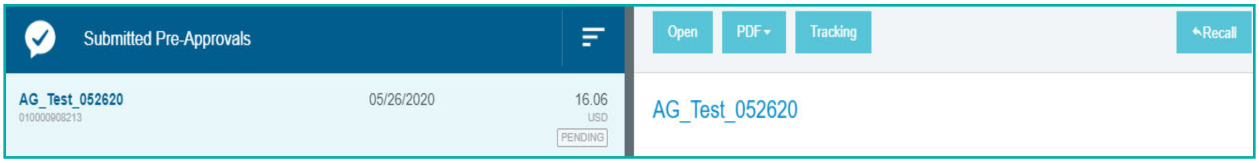
Recall a Pre-Approval Report

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.

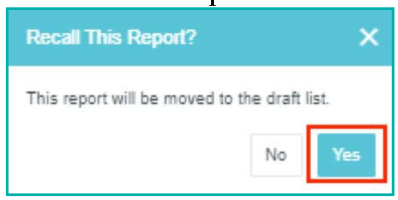
1. On the traveler's dashboard, click Submitted Pre-Approval



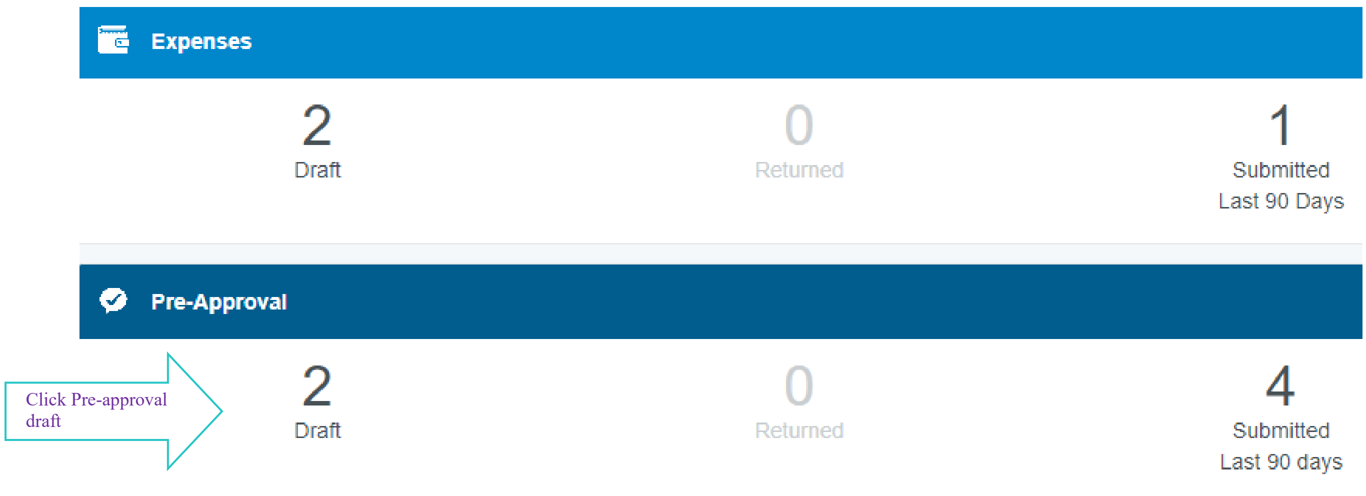
2. Select the report you want to recall, click Recall



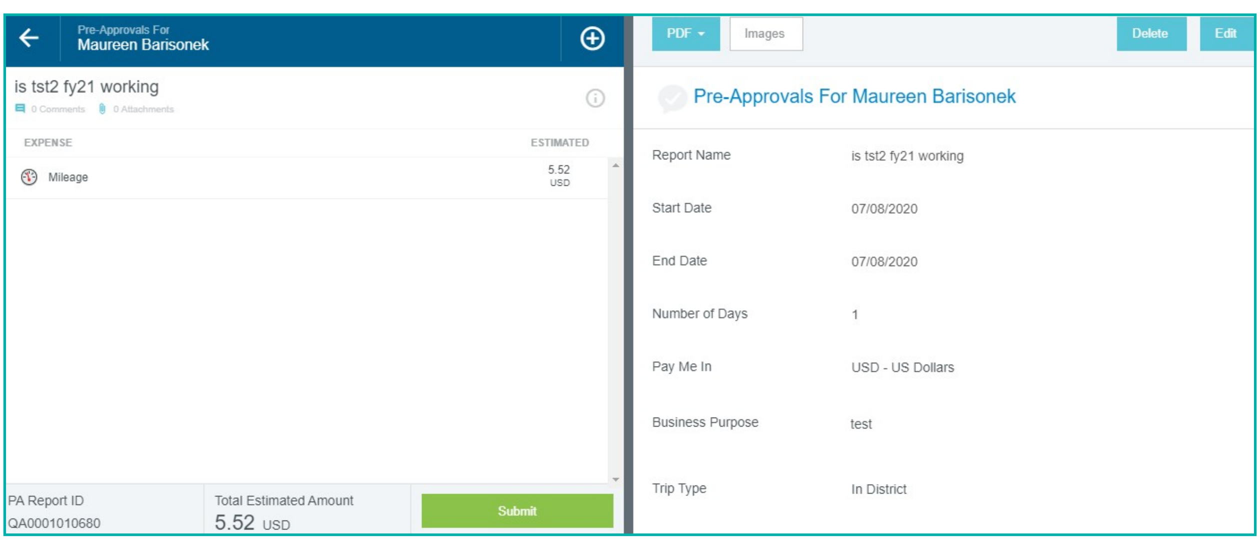
3. Click Yes to confirm you want to recall the report



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



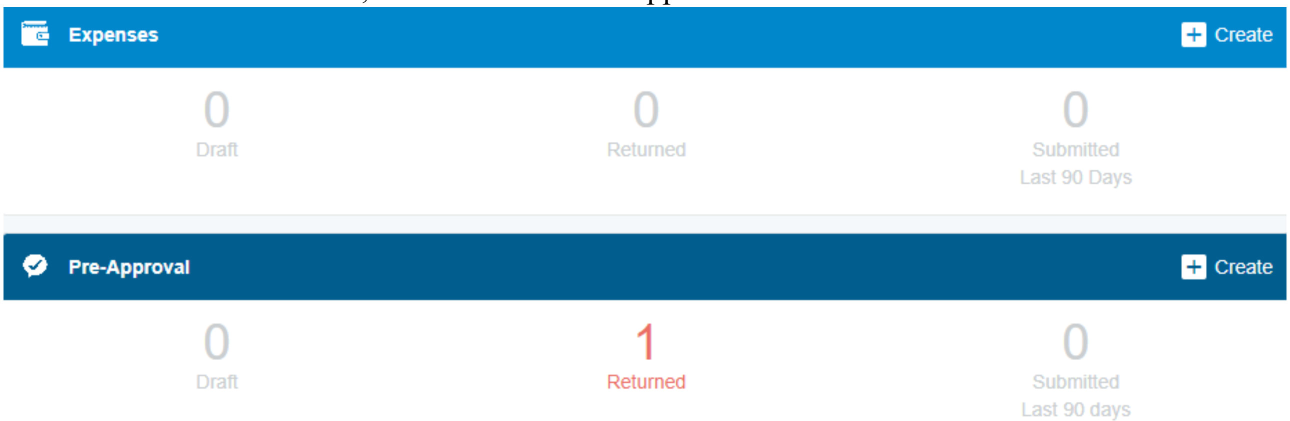
5. To edit the report, select the report from the Draft Pre-Approvals list, click Open, then click Edit. After editing, click Submit on the left



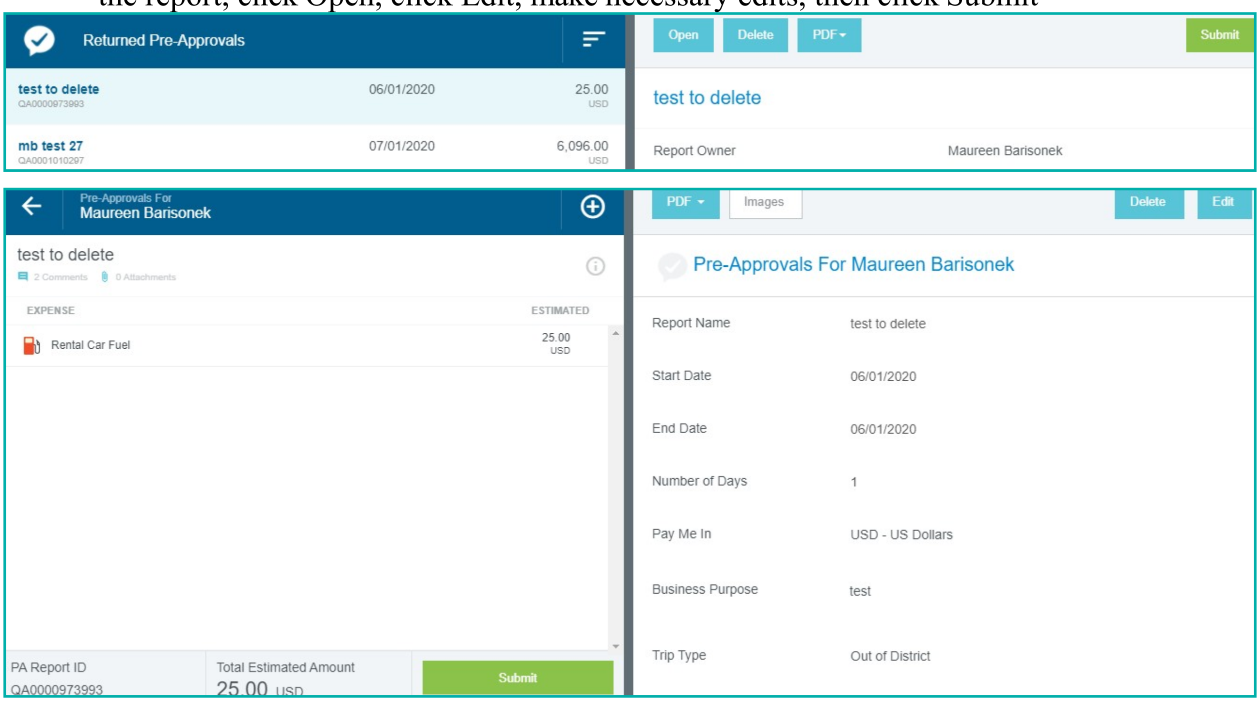
Returned Pre-Approval Report

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.

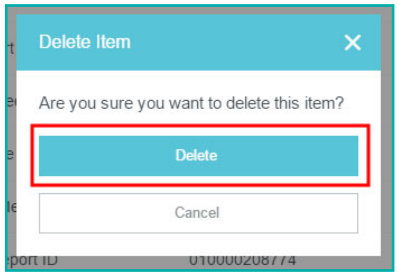
1. On the traveler's dashboard, click Returned Pre-Approval



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

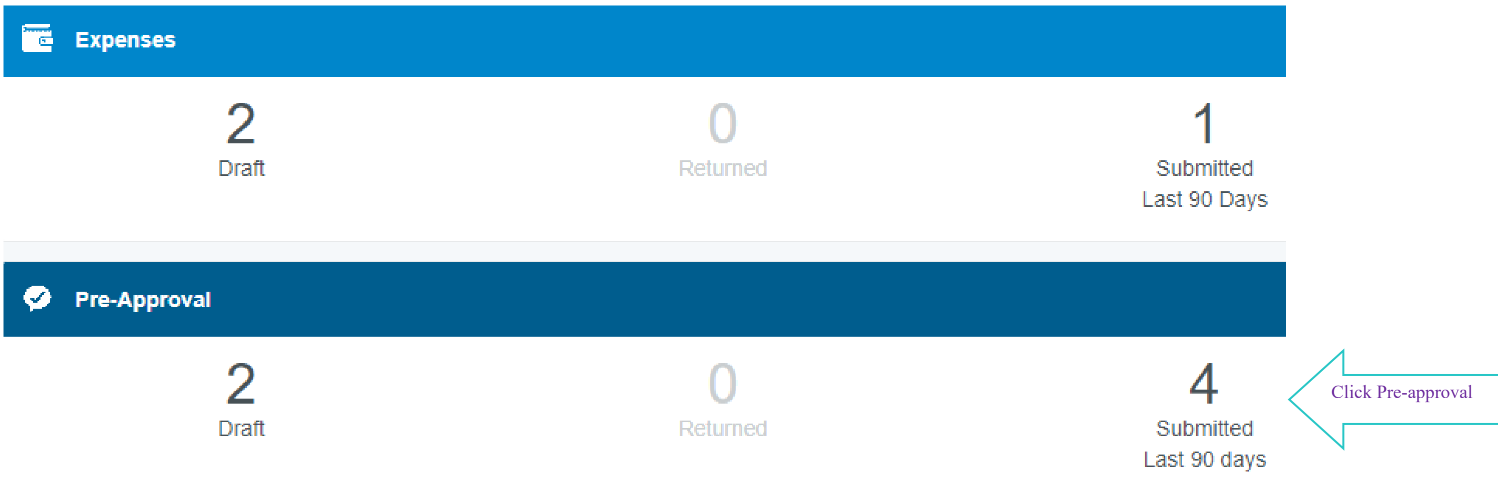


3. If you need to delete the Pre-Approval report, click Delete. Click Delete again to confirm you want to delete the report

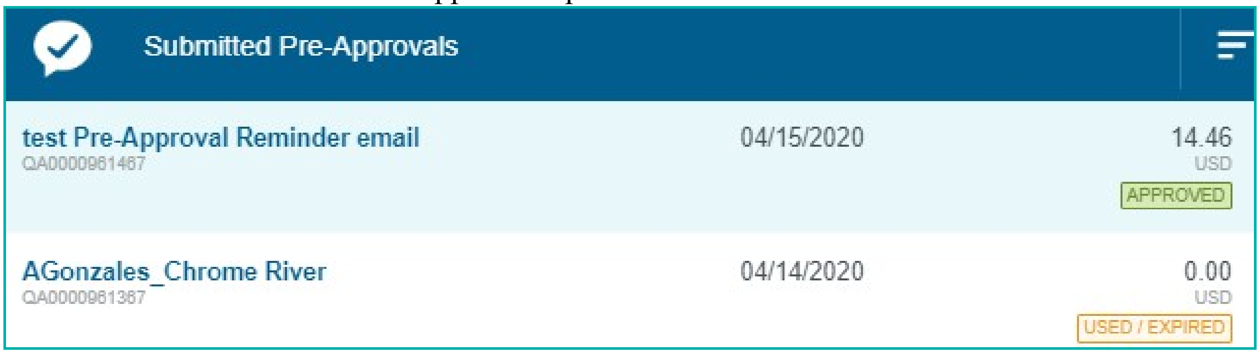


Approved Pre-Approval Report

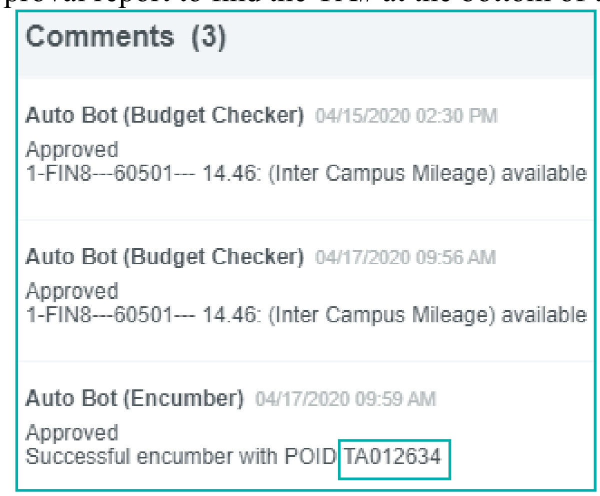
1. On the traveler's dashboard, click Submitted Pre-Approval



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



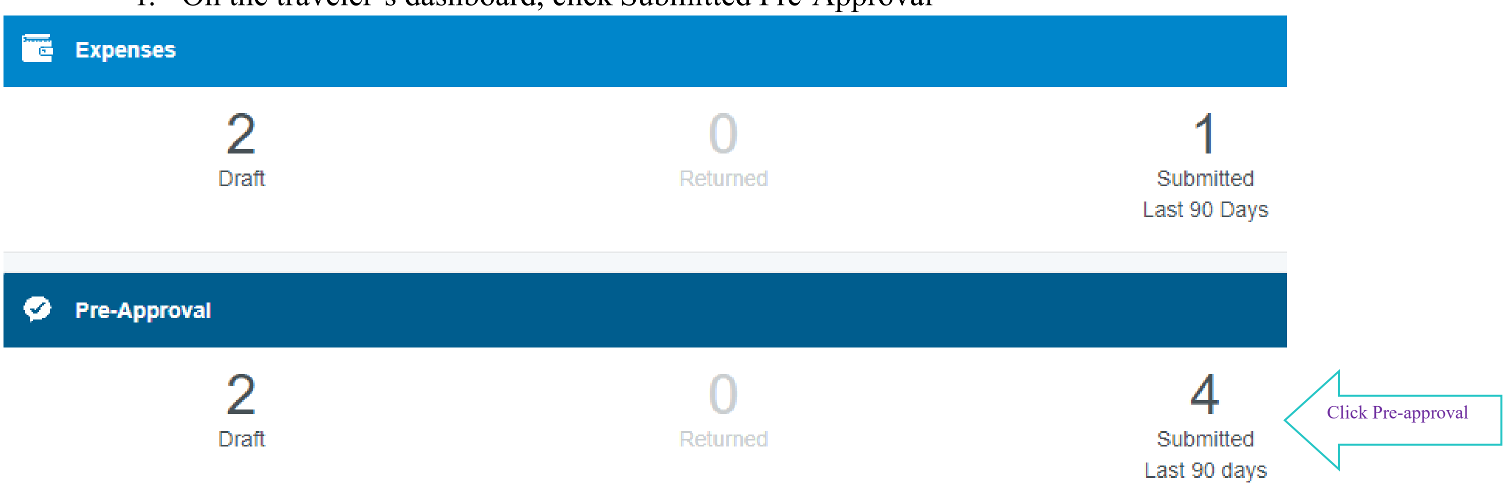
3. Select the Pre-Approval report to find the TA# at the bottom of the preview screen



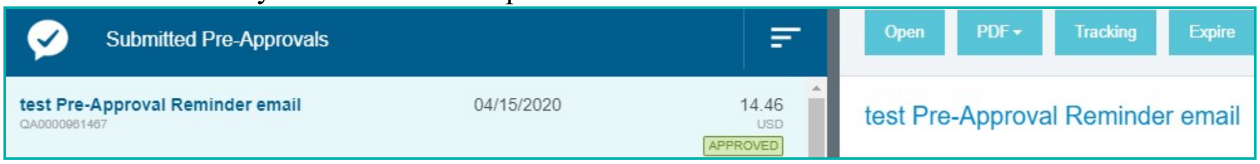
Expire a Pre-Approval Report

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

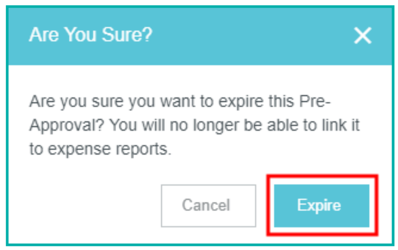
1. On the traveler's dashboard, click Submitted Pre-Approval



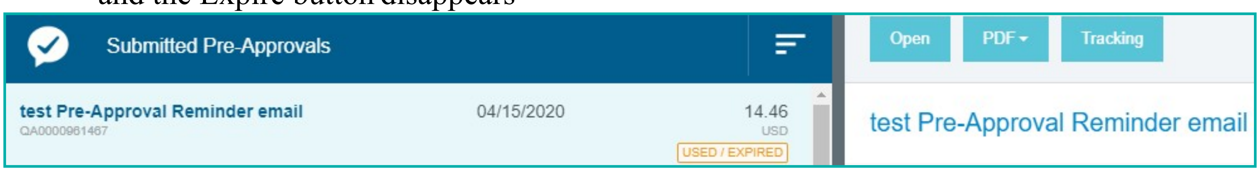
2. Select the report you want to expire, then click Expire on the preview screen. The Expire button is only accessible on the preview screen



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

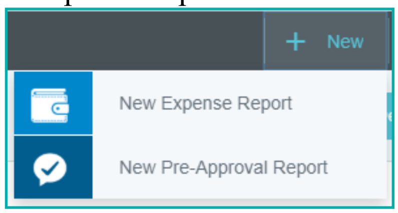


Expense Report

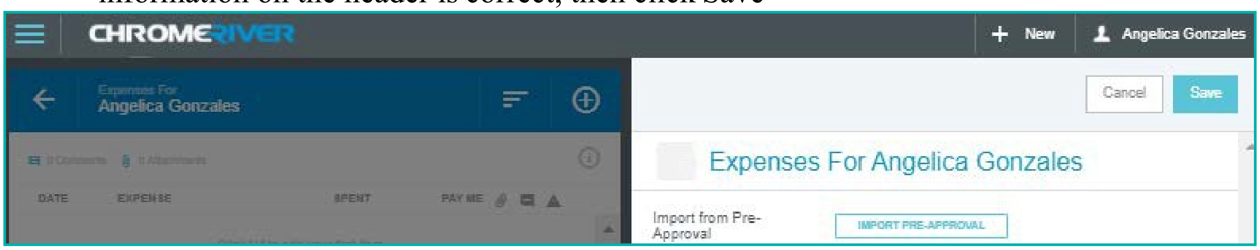
An Expense report creates the reimbursement payment. An Expense report must be created from an approved Pre-Approval report. Expense reports must be submitted within 60 days from the traveler's return date.

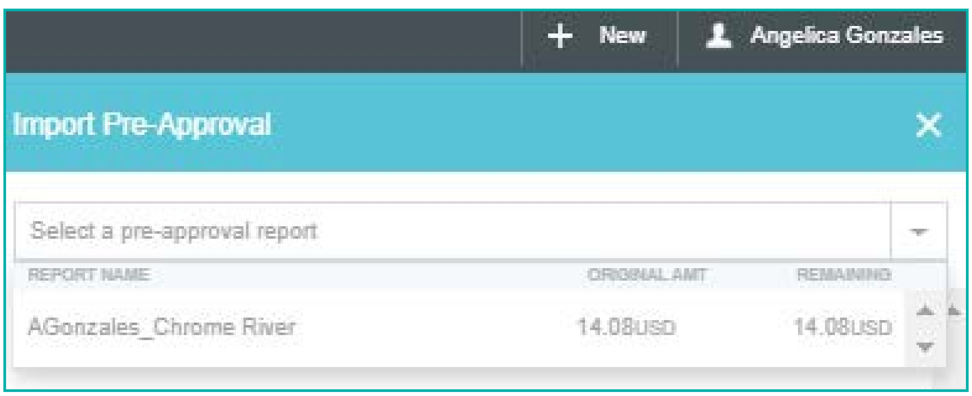
Create a New Expense Report

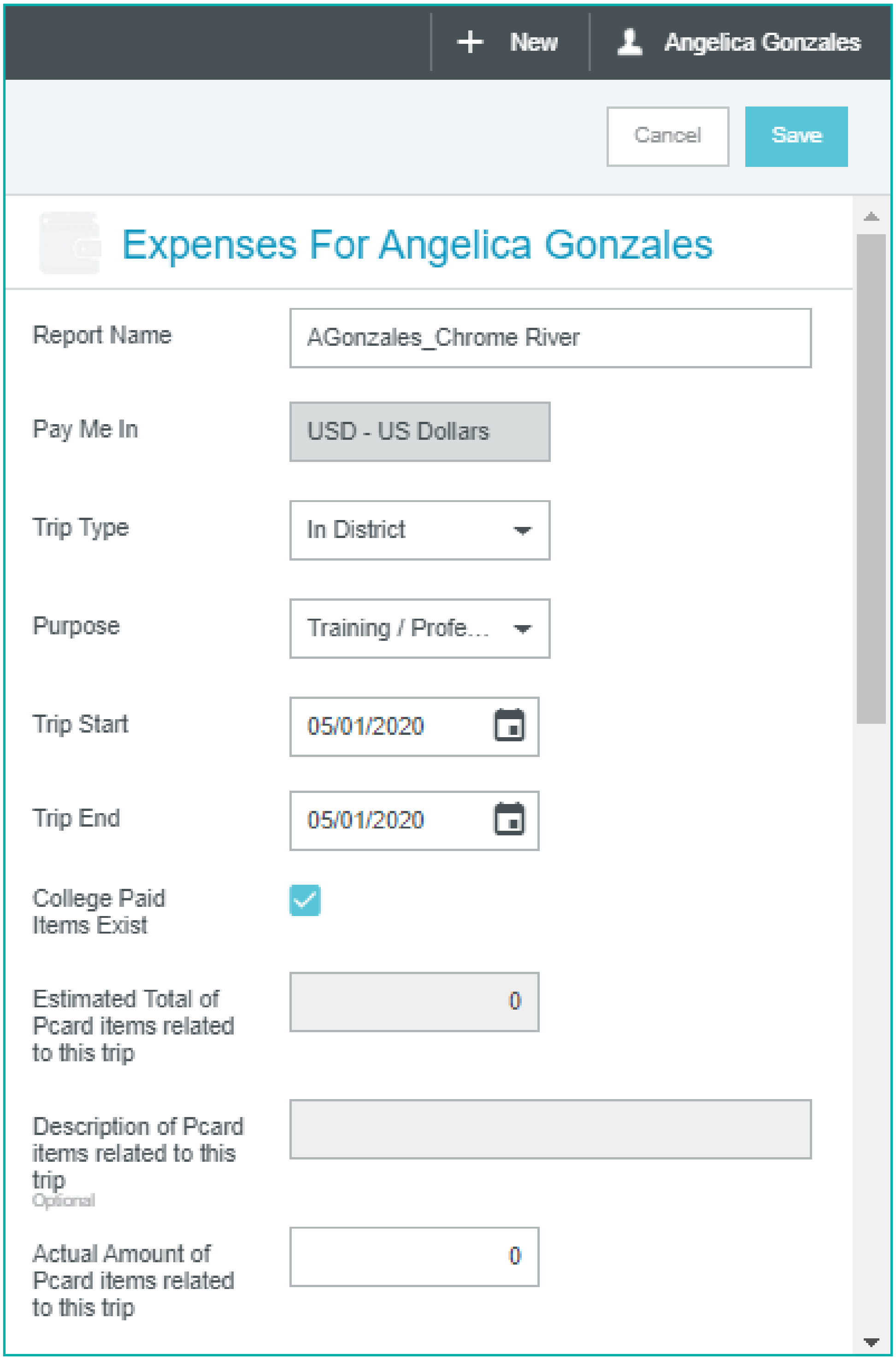
1. Click New, and select New Expense Report



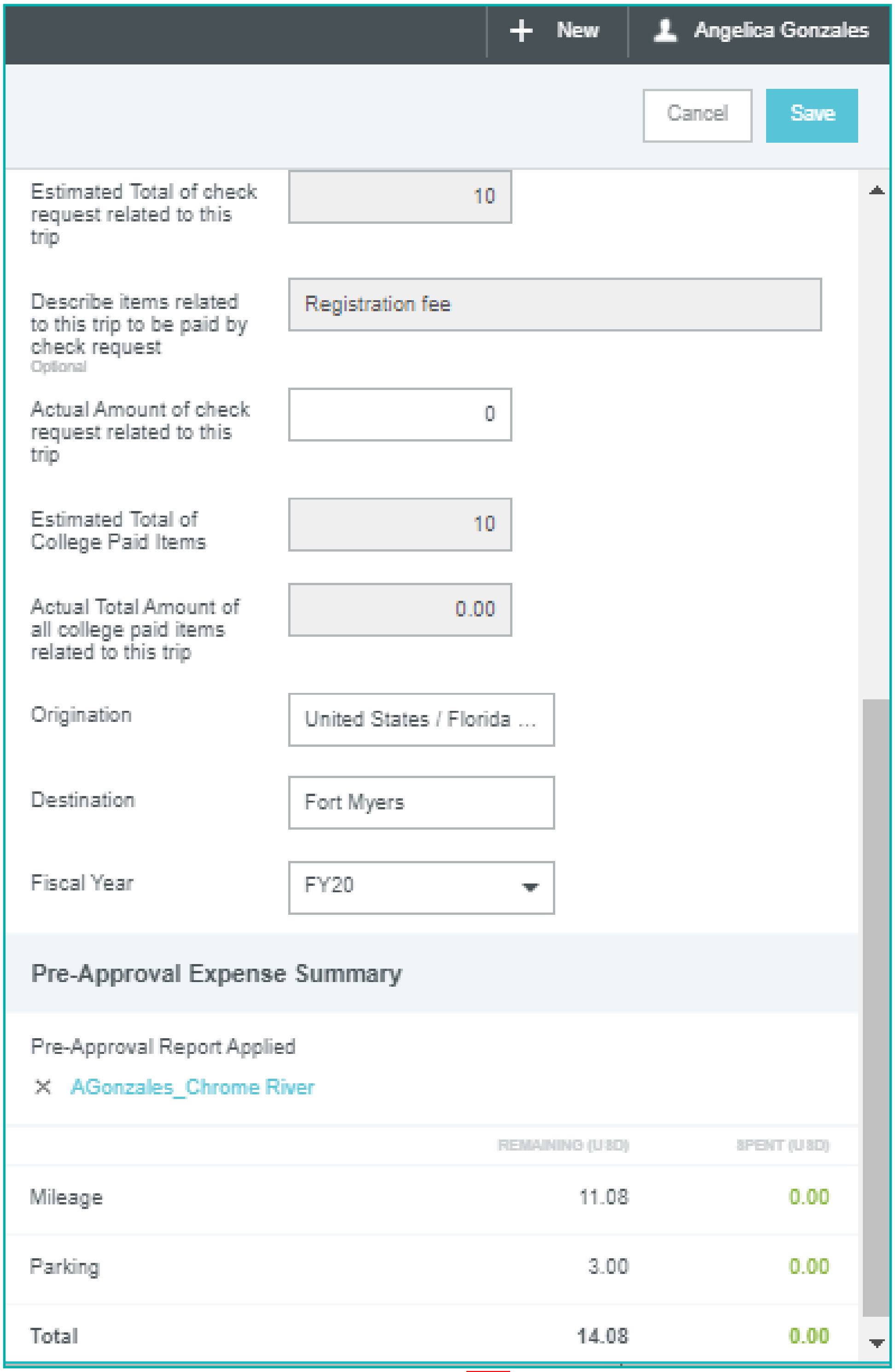
2. The Expense entry screen will appear. Click IMPORT PRE-APPROVAL, select the desired Pre-Approval report, then click Import to populate the report. Verify all information on the header is correct, then click Save

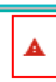


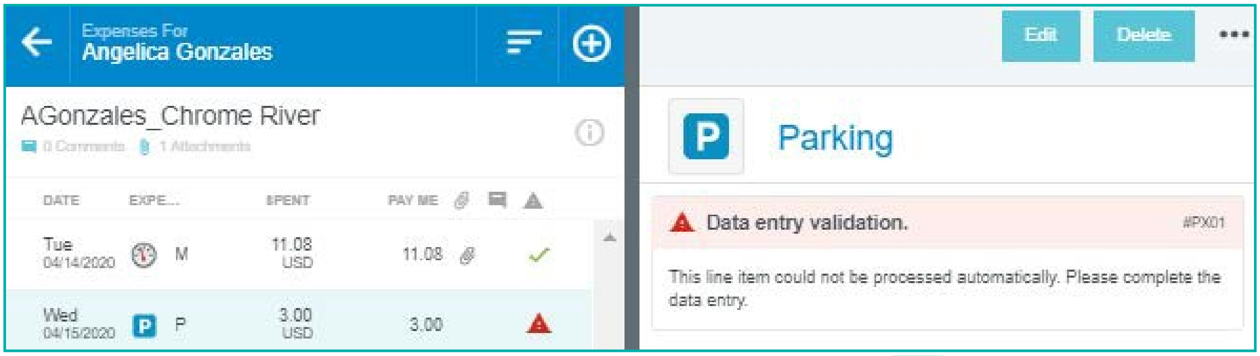


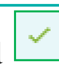


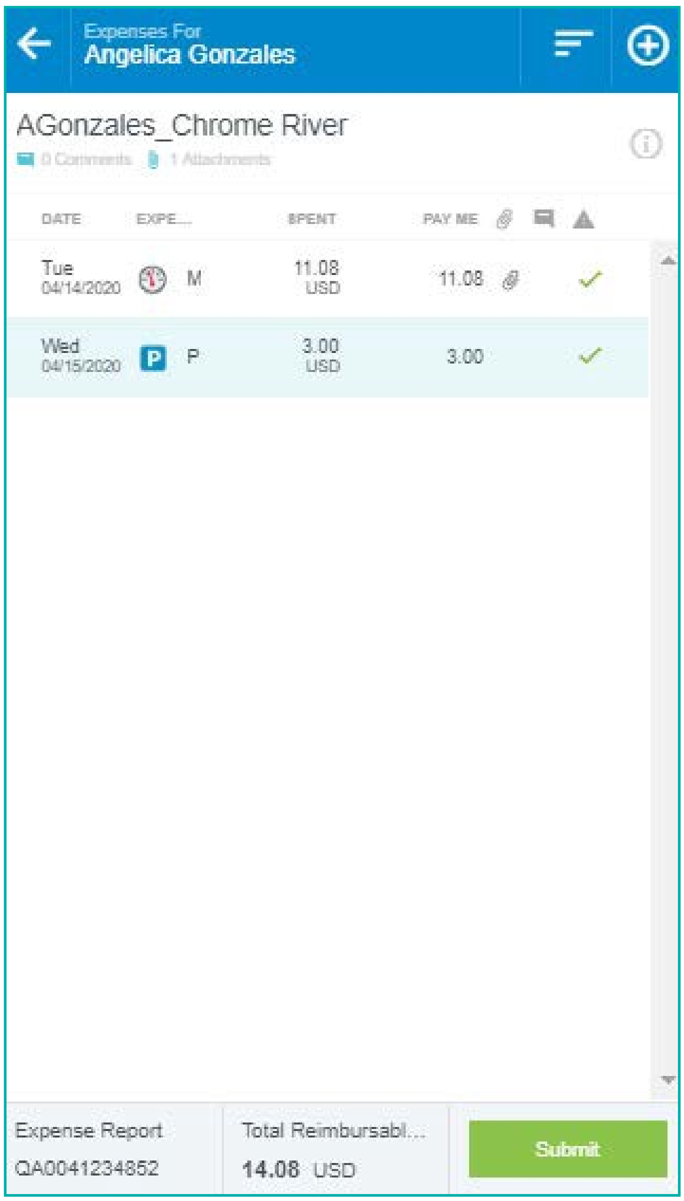
New
Angelica Gonzales
Cancel
Save
Expenses For Angelica Gonzales
Report Name
AGonzales_Chrome River
Pay Me In
USD - US Dollars
Trip Type
In District
Purpose
Training / Profe...
Trip Start
05/01/2020
Trip End
05/01/2020
College Paid Items Exist
Estimated Total of Pcard items related to this trip
0
Description of Pcard items related to this trip
Optional
Actual Amount of Pcard items related to this trip
0



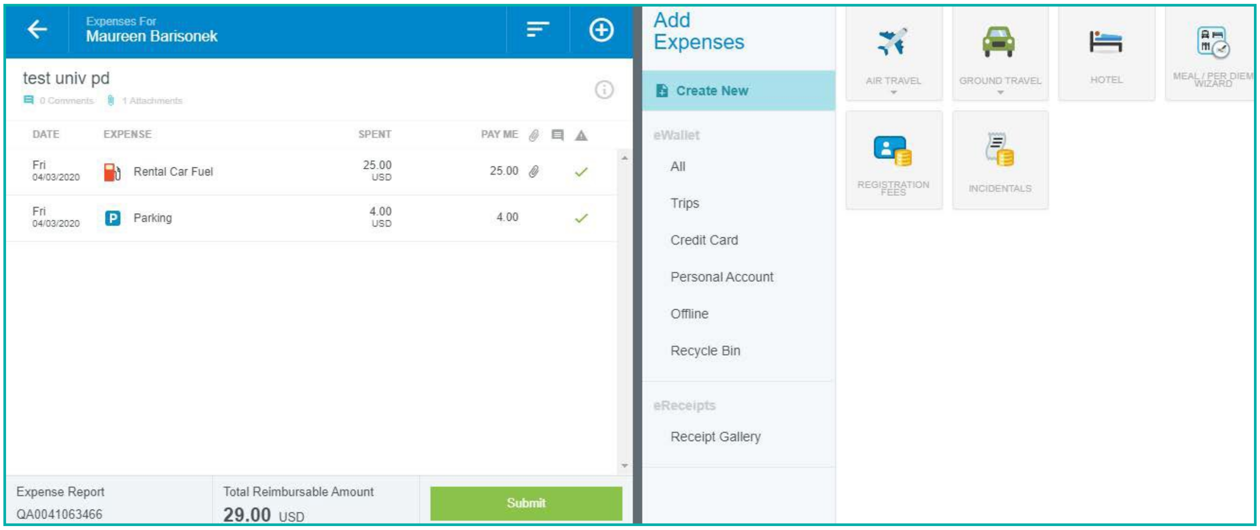
3. Validate expenses with Violation warning . Click the expense, click Edit, make necessary edits and/or upload necessary attachments, click Save. Expenses $5.00 or more require receipts



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



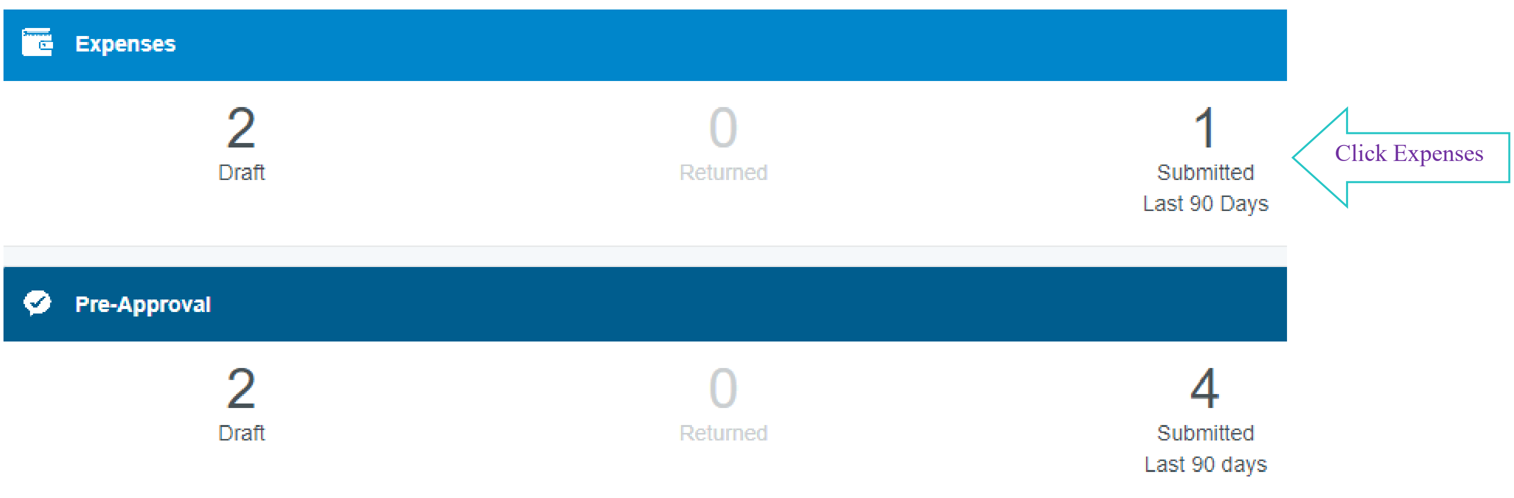
5. If you need to add more expenses, click + to expand the expense types list. When you are done adding expenses, click Submit



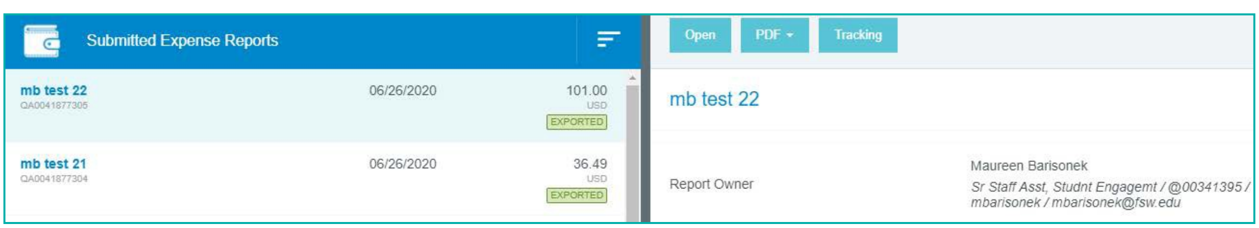
Track an Expense Report

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

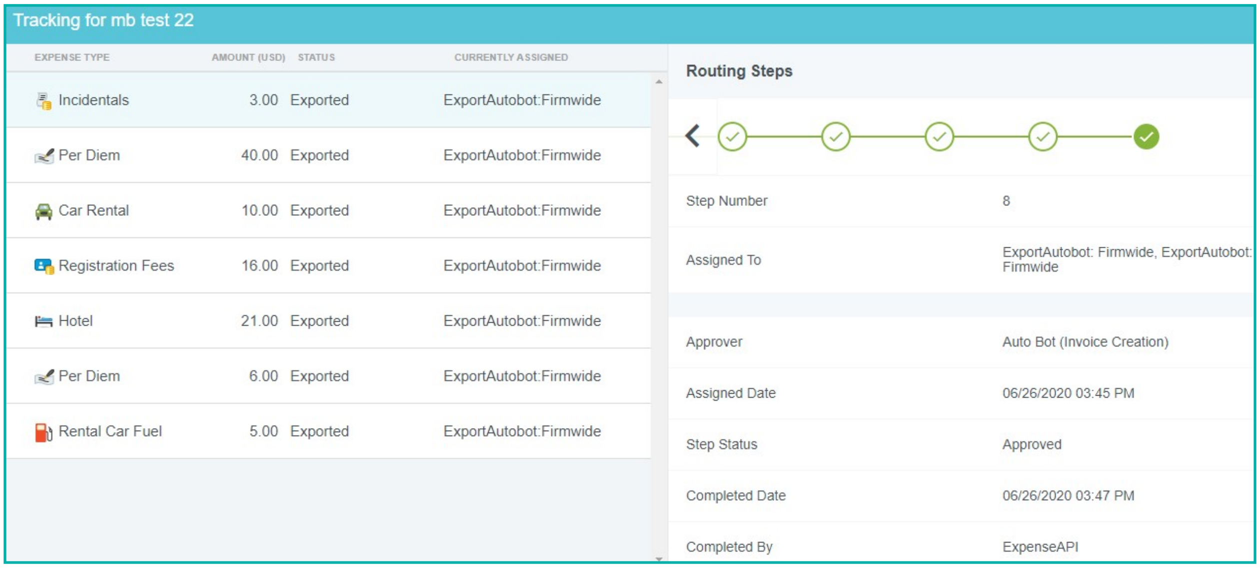
1. On the traveler's dashboard, click Submitted Expenses



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



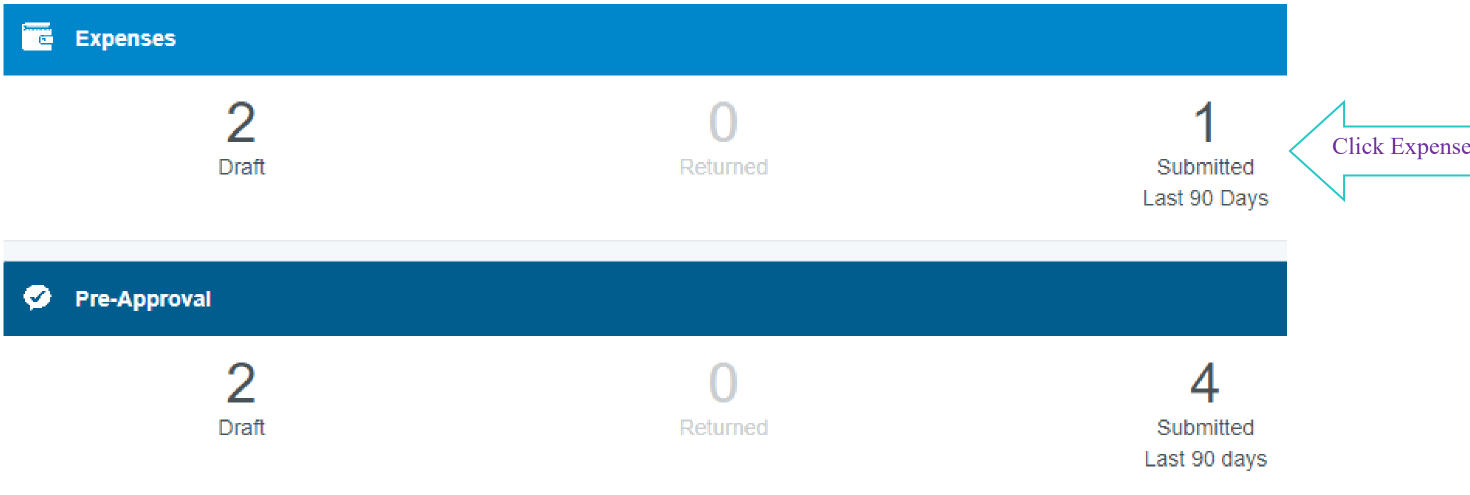
3. After clicking Tracking, you will be able to see where/who the report is assigned to



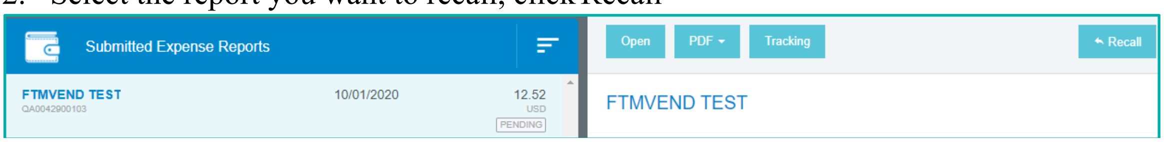
Recall an Expense Report

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.

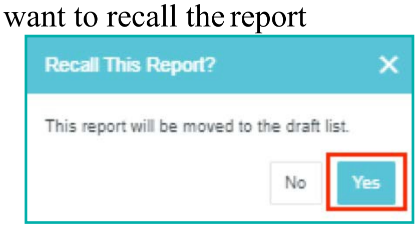
1. On the traveler’s dashboard, click Submitted Expenses



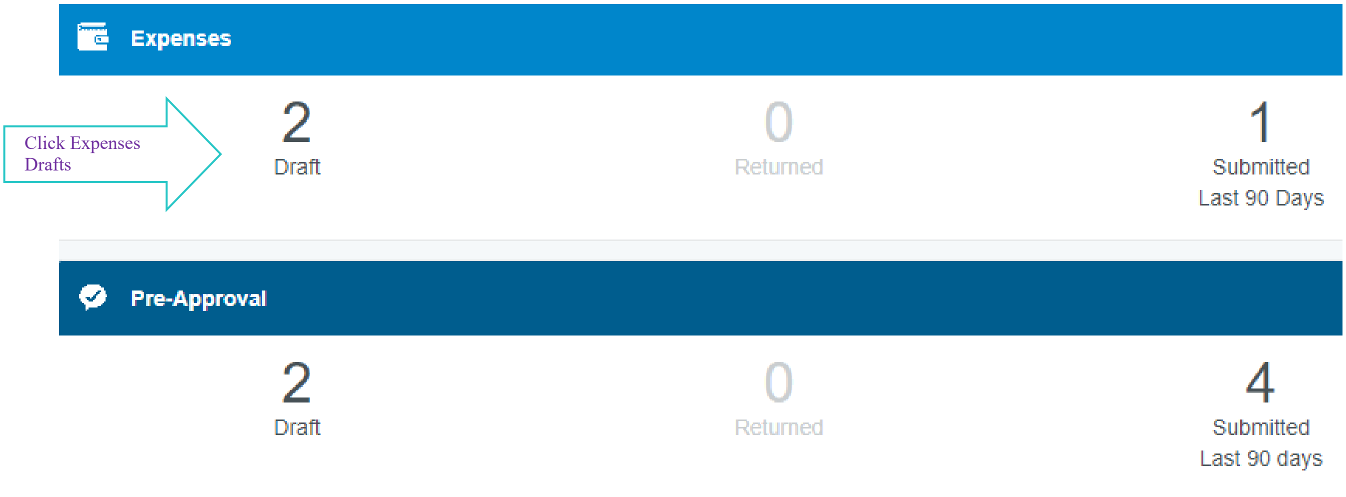
2. Select the report you want to recall, click Recall



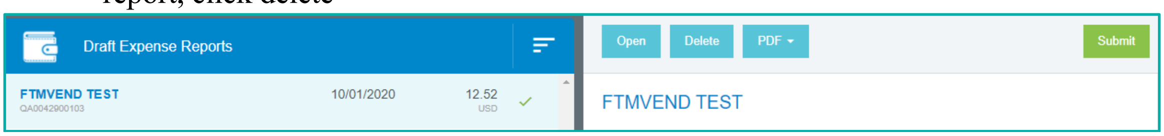
3. Click Yes to confirm you want to recall the report

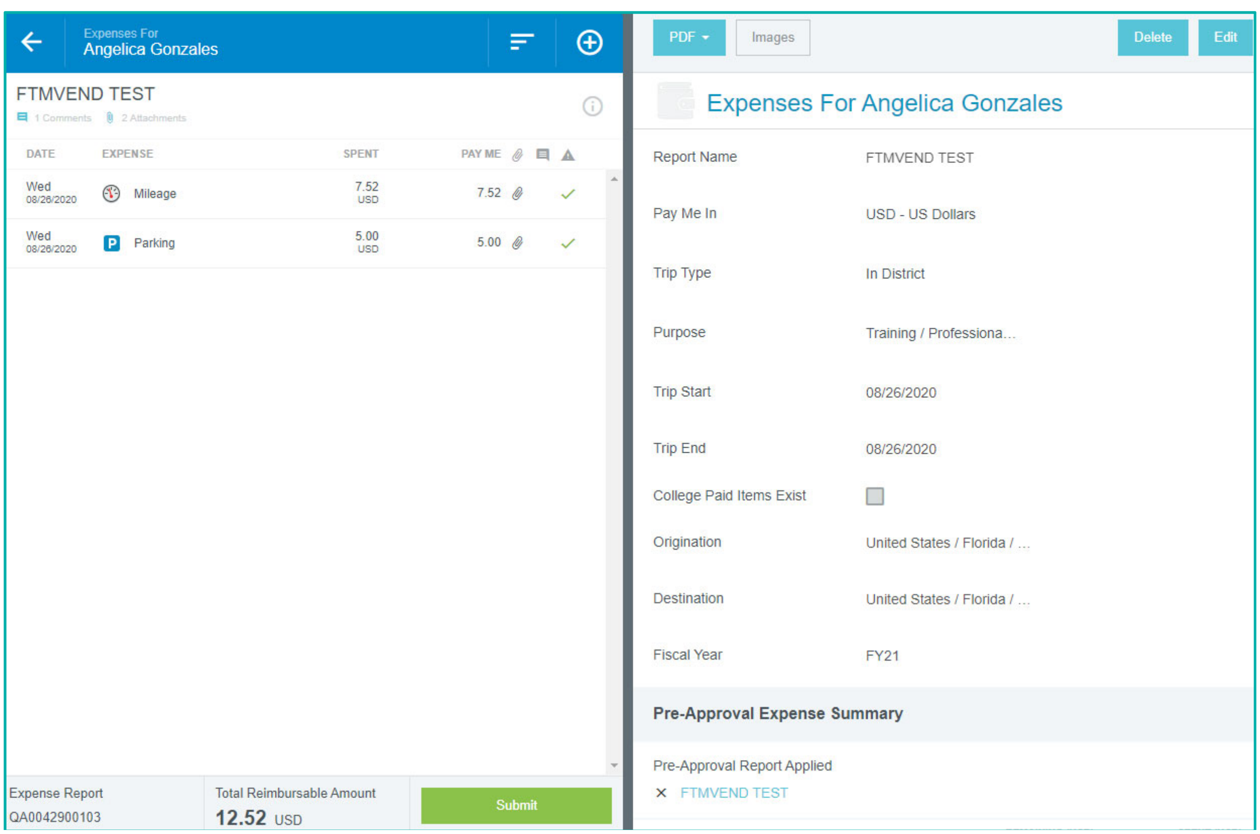


4. The report can be found on the traveler's Draft Expenses. It will retain any notes entered during the incomplete approval process



5. 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

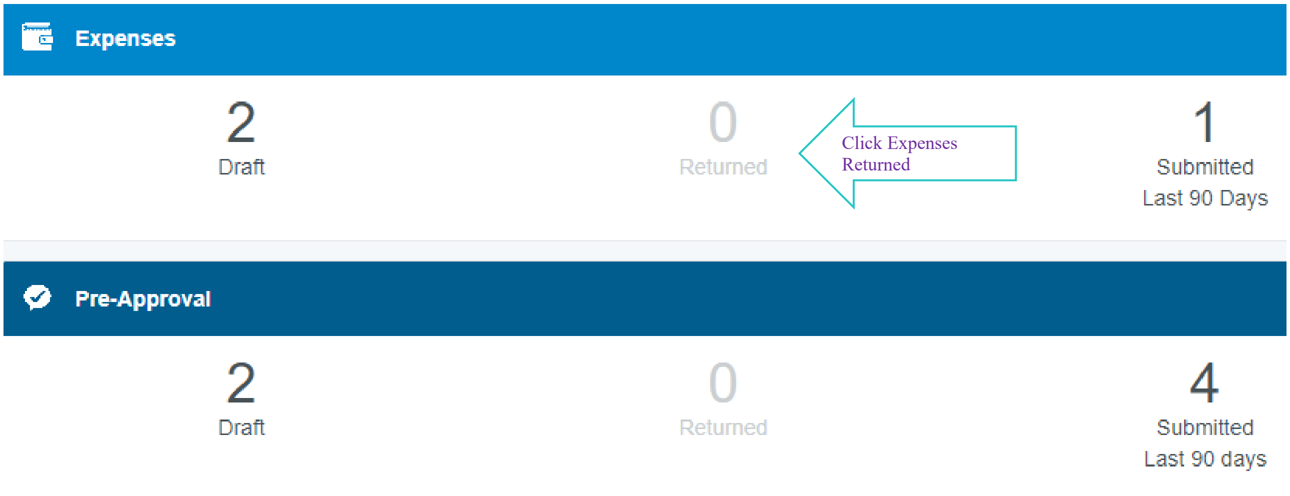




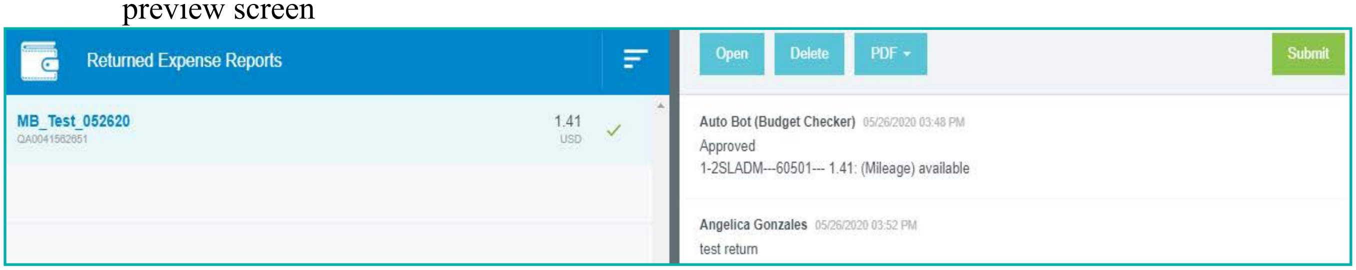
Returned Expense Report

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



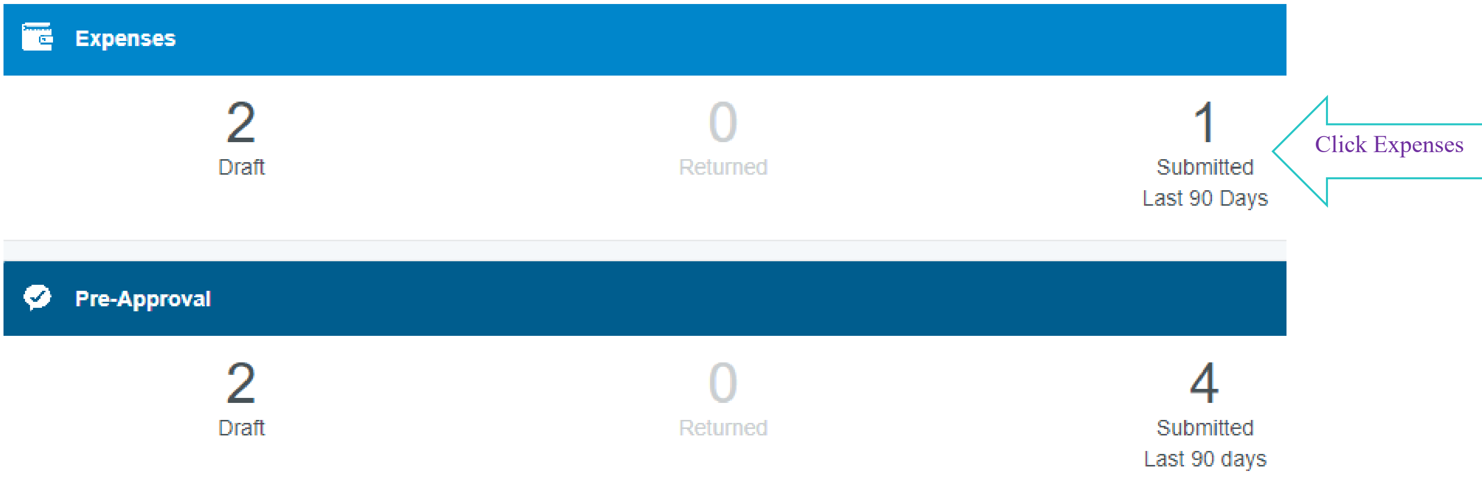
2. Select the report to view the approver's comment at the bottom of the preview screen



Approved and Exported Expense Report

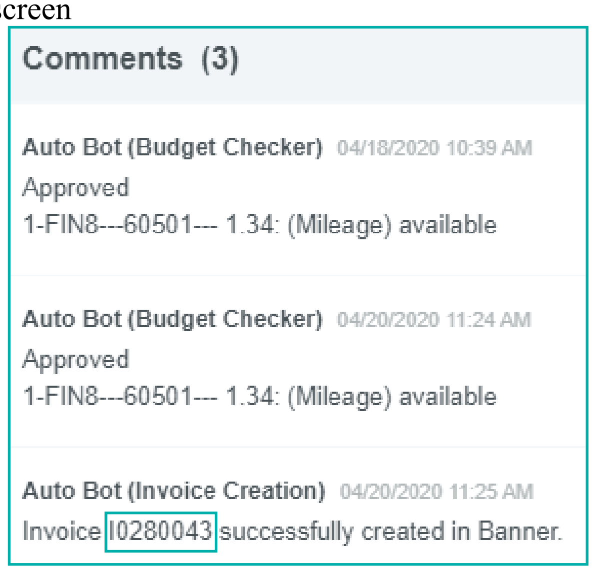
An approved Expense report had been approved by all approvers, but has not yet been exported. An exported Expense report has been sent to payment processing.

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



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

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



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

4. 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.

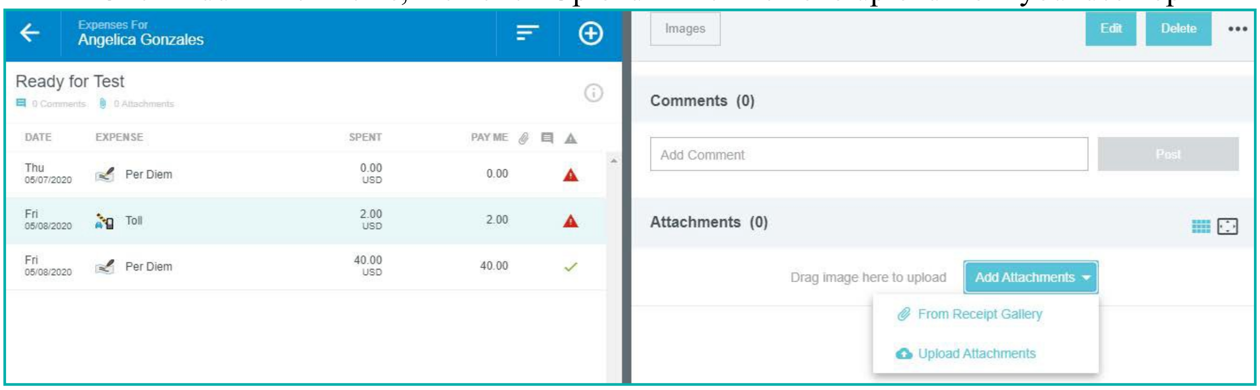
Subject: xx.xx – The Subject line should be the amount of the expense with no symbols. If you do not put the expense amount on the Subject line, the amount will be 0.00 when the expense appears in Chrome River.

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.

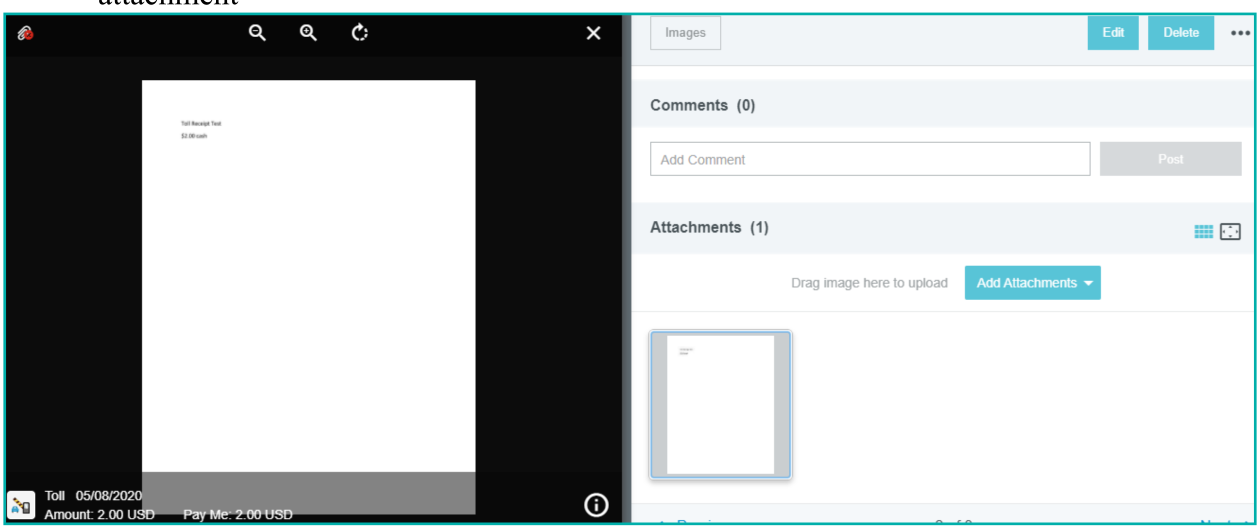
HTML Receipt – You can forward HTML email confirmation or receipt for an expense directly to receipt@chromefile.com to have it converted to a receipt image. You must use the same email address associated with Chrome River account for the system to recognize, and store the receipt in your account. The 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.

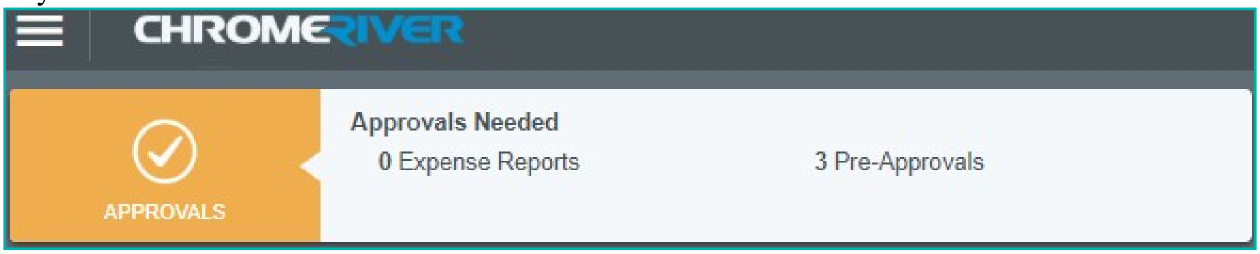
Warnings indicate that additional information is required before submitting the report for approval. Respond by either modifying the data or replying to the warning.
If a response is required, click Enter Response in the message box, and enter a response. Click Save to update, and close warning message.

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.

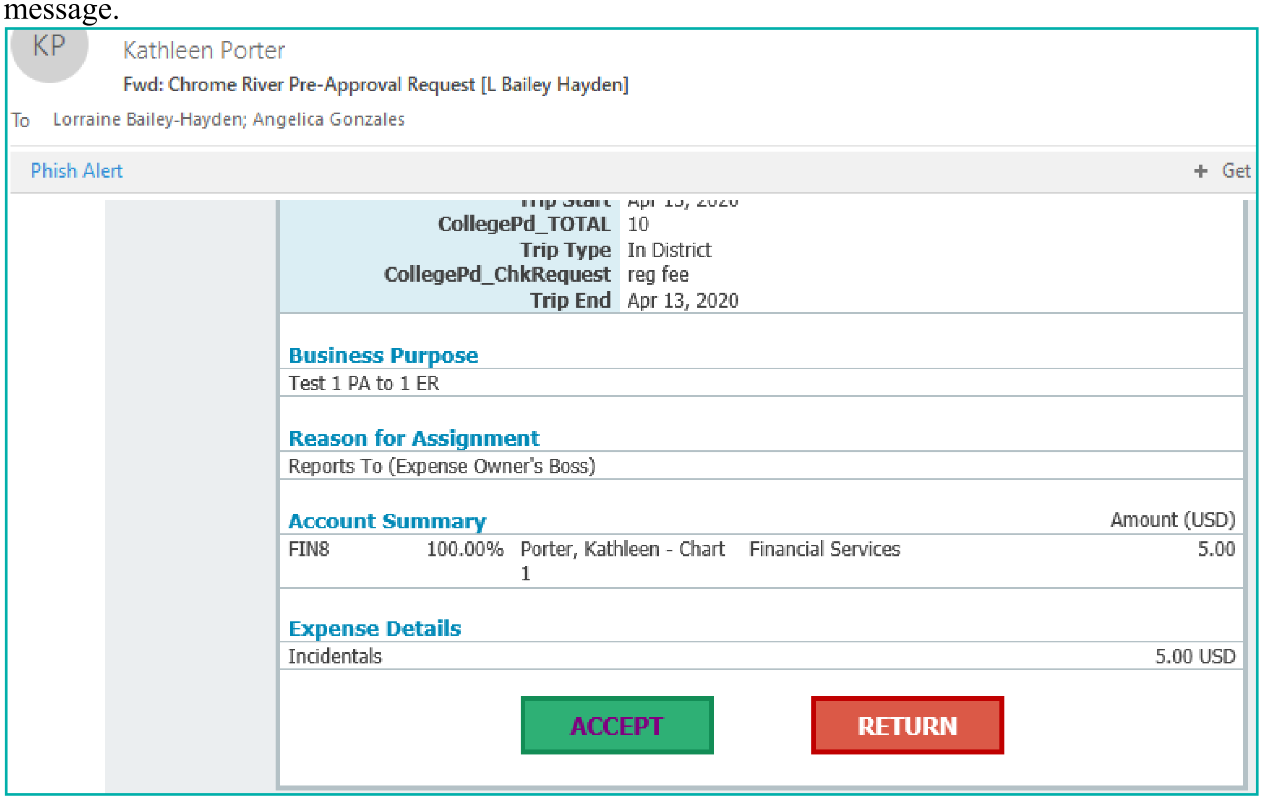
Report Approval

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.

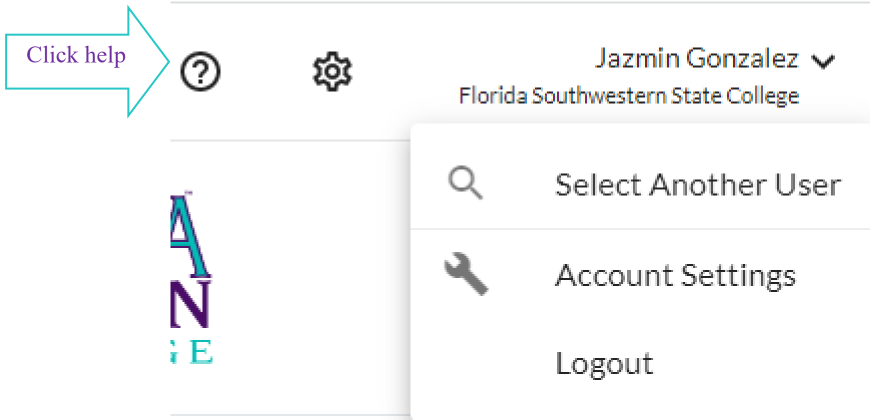


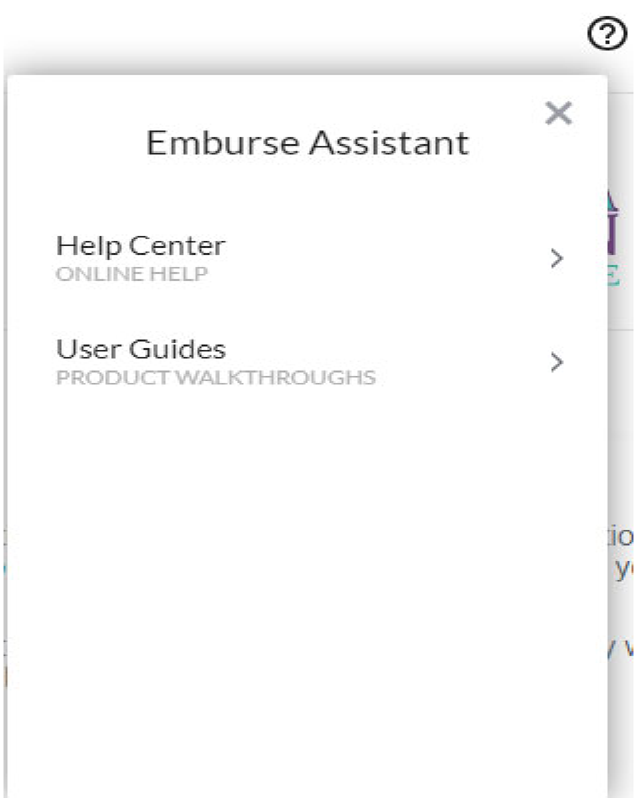
Via email, click ACCEPT or RETURN, and add any comments to the new email that opens, or forward the approval email to approve@preapproval.us.chromeriver.com or return@preapproval.us.chromeriver.com with any comments at the top of the forwarded message.

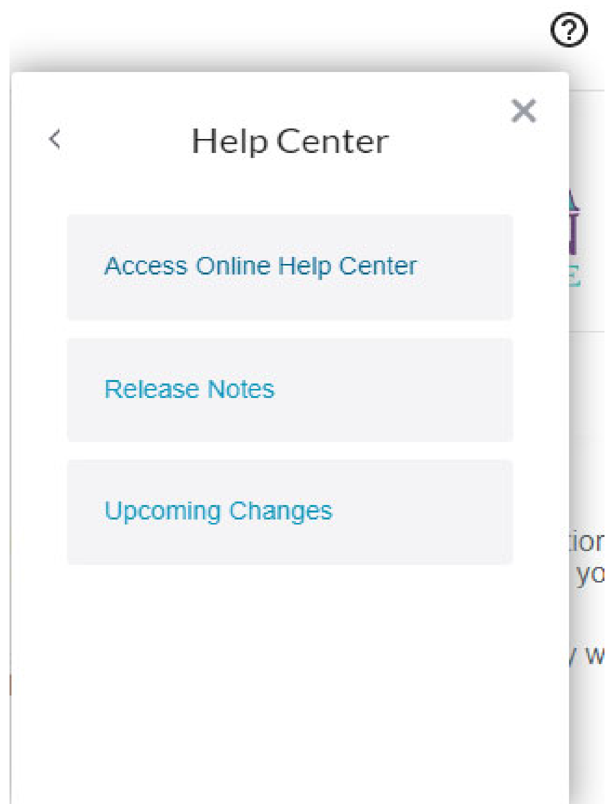


Chrome River Help Center

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