

CHROME RIVER

OVERVIEW



The Benefits of Chrome River

- No more printing paper forms!
- Reports are automatically routed for you, and you can easily track where your Pre-Approval and Expense reports are in the approval process
- Snap a photo of your receipts on your mobile device and send them to your Receipt Gallery
- When entering mileage, google maps will automatically pop-up and attach a map to your report
- Approvers receive detailed emails when a report requires their approval and can approve or return a report from the email
- The system will calculate rates for you (ex: per diem, IRS mileage)
- Pcard transactions related to travel will be housed in the E-wallet
- The system will tell you if you are missing something before you fully submit a report
- End Users have the ability to run reports such as: My Delegates, My Expense Approval Items & My Firm Paid Items



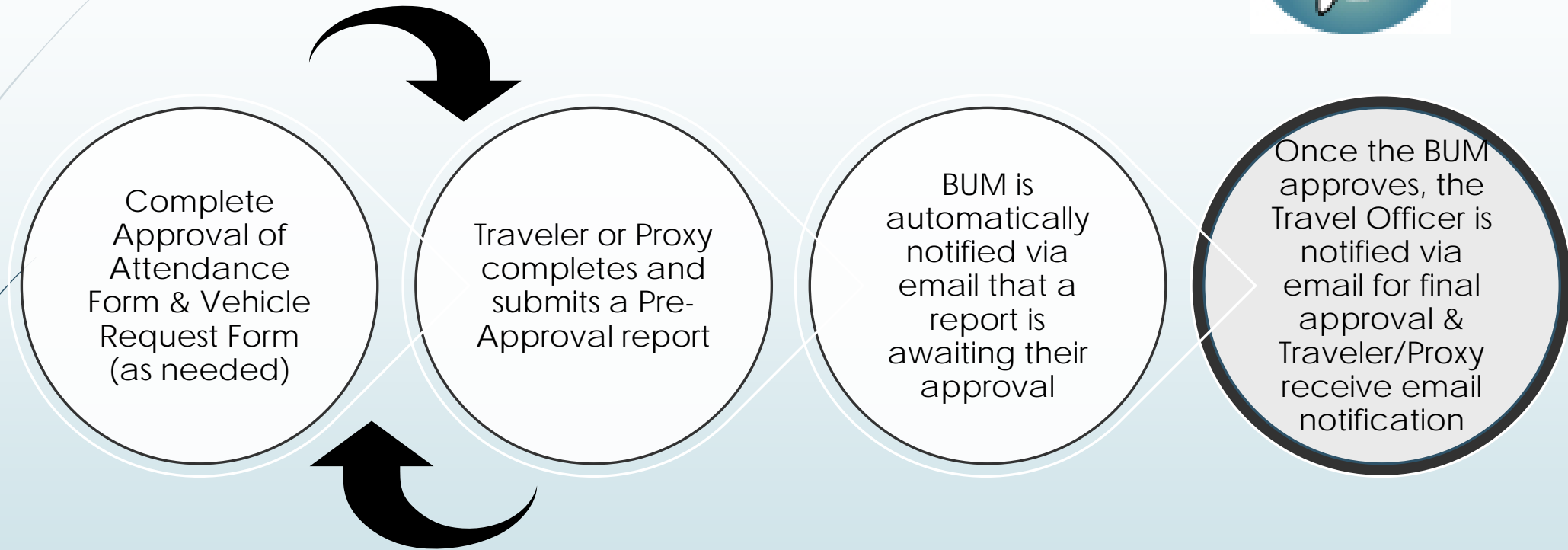


Pre-Approval Reports

Pre-approvals are now used in lieu of the ARRTV form. Pre-approvals allow travelers to obtain pre-authorization from their BUM and Travel Officer for an expense before it is incurred or a reservation is made.

A Proxy completing a report on behalf of the traveler must select that user's name prior to completing the report.

Pre-trip Authorization Process



International travel will require additional approval from Global Engagement, Risk Management, and VP/Provost. Chrome River will automatically route your Pre-Approval to the appropriate person for each step.

Approving & Returning Pre-Approvals via Email

- ▶ Chrome River will email you reports that require your approval.
- ▶ You can approve the expenses or return them to the requestor simply by forwarding the email or clicking on **ACCEPT** or **RETURN**. The instructions are included in the email.
- ▶ When clicking on **ACCEPT** or **RETURN**, a new email will open which will allow you to add any comments.
- ▶ **BEST PRACTICE:** cc anyone on your email who you think may want this notification. The Proxy will only automatically receive notification if he/she completed the PA on behalf of the traveler.

ACTION REQUIRED				Chrome River	
Pre-Approval Request For	Stacey Harnett				
Report Name	SRA Annual Meeting 4/13/2018				
Pre-Approval ID	0100-0043-5815				
Submit Date	04/25/2018				
Expense Dates	04/13/2018 - 04/19/2018				
Total Expenses Approved	3,762.02 USD				
Business Purpose					
Society and Research Administrators International (SRA) annual meeting. Networking and professional development.					
Account Summary					Amount (USD)
430006	100%	Disbursements	430006	3,762.02	
		110005 University	60 Institutional Support		
		Operating Unrestricted			
Expense Summary				Amount (USD)	
	Airfare			720.00	
	Hotel - Lodging			1,000.00	
	Other Travel Expenses			550.00	
	PerDiem			692.50	
	Personal Vehicle Mileage			74.52	
	Registration Fee			725.00	
ACCEPT				RETURN	

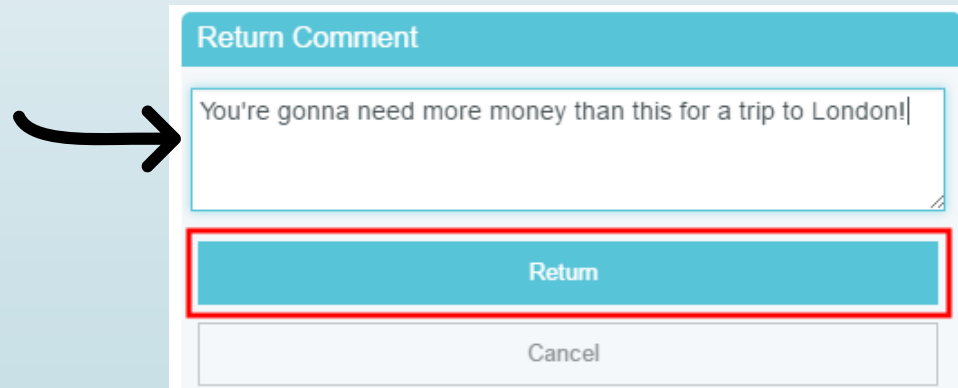
Pre-Approval ID: 0100-0043-5815

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@chromefile.com or return@chromefile.com with any comments at the top of the forwarded message.

Approving & Returning Pre-Approvals in Chrome River

- Reports that require your approval will be in the **Approvals Needed** notification bar at the top of your Dashboard. Click on the approval and a preview will slide in from the right. From the preview you can:
 - **Open:** Open to make adjustments before it is routed to the next step in the approval process. You have the ability to select a line item and edit amounts and allocations.
 - **PDF:** View the PDF report of the PA request.
 - **Tracking:** View the routing history.
 - **Return:** You do not approve the request and it is returned to the expense owner. Note that a return comment is required.



Return Comment

You're gonna need more money than this for a trip to London!

Return

Cancel



- **Approve:** You approve the request and it is routed to the next step in the approval process.

Examples of Emails Sent to Traveler

- When a Pre-Approval Report is returned, the end user will receive an email stating there is *Action Required*. Any comments you have added will also show in the email. The report will be sent back to the traveler's dashboard.
- When a Pre-Approval has completed the routing process and has been approved by the Travel Officer, the traveler receives an email serving as a notification of approval.

ACTION REQUIRED Chrome River

The following Pre-Approval has been returned with comments. You will need to review these comments and resubmit this Pre-Approval Request if you still need these expenses pre-approved.

Pre-Approval Request for	Stacey Harnett
Report Name	Gaming Congress Conference 6/13/18
Pre-Approval ID	0100-0045-1976
Submit Date	05/24/2018
Expense Dates	06/13/2018 - 06/14/2018
Total Expenses	955.00 USD

Notes

05/24/2018	Mary Hughes	I do not approve the parking
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PRE-APPROVAL

7 Draft

2 Returned

28 Submitted Last 90 days

NO ACTION REQUIRED Chrome River

The following Pre-Approval Request has been approved.

Pre-Approval Request for	Stacey Harnett
Report Name	Ellucian Conference 5/8/18
Pre-Approval ID	0100-0044-5410
Submit Date	05/11/2018
Expense Dates	05/08/2018 - 05/10/2018
Total Expenses	819.56 USD



Expense Reports

Expense Reports will be completed when a traveler is requesting reimbursement and the completed, approved report will feed into Banner as a direct pay. The vendor invoice field will populate as the first date of travel.

BEST PRACTICE: *The E-Wallet will contain any Pcard transactions related to travel. These transactions will only show in Chrome River if they have been closed by Disbursement Services. In order to expedite reimbursements, please ensure you are approving Pcard transactions in a timely manner.*

Approving & Returning Expense Reports

- ▶ Just like the PA Report, Chrome River will send you an email when there is an Expense Report that requires your approval. You may **ACCEPT** or **RETURN** all line items on the Expense Report from the email.
- ▶ Approving the report will route it directly to Disbursement Services for final approval as a direct pay. There is no need to approve travel related direct pays in Banner (with the exception of candidate reimbursements).
- ▶ Opening the Expense Report in-app will allow you to approve or return line items individually rather than responding to the entire report at once. You also have the ability to adjust the following:

- Approved Amount
- Business Purpose
- Allocation



Example of an Expense Report Email

- The expense report email will detail each expense line by line.
- You can see each expense and the total that was approved on the Pre-Approval vs. what was submitted.
- Receipts can be viewed from the email.
- Any compliance warnings will be listed.
- If you prefer to the view the Expense Report from the Chrome River application, you can click on the words "Click Here" on the bottom of the email.

ACTION REQUIRED		Chrome River	
Expense Report for	Stacey Harnett		
Report Name	Banner Ellucian Live 2018 - 4/7/18		
Submit Date	04/18/2018		
Expense Dates	04/07/2018 - 04/12/2018		
Total Expenses	3,054.31 USD		
Account Summary			
430006	Disbursements	430006	Amount (USD)
	110005 University Operating	60 Institutional Support	3,054.31
	Unrestricted		
Pre-Approval Summary			
		Estimated (USD)	Submitted
	Airfare	500.00	447.31
	Baggage Fee	100.00	0.00
	Hotel - Lodging	1,625.00	1,636.62
	PerDiem	290.00	226.00
	Registration Fee	695.00	695.00
	Adjustments	-64.00	
	Totals	3,146.00	3,004.93
Expense Details			
04/07/2018	Meals - Other	430006	-57.72 USD
	430006 Disbursements		
	110005 University Operating	60 Institutional Support	
	Unrestricted		
Business Purpose	Networking and community building with thousands of peers; boost productivity with advanced business processes. Learn new processes and keep current on changes in Banner Finance; focus will be Banner 9, including self-service and Chrome River.		
Description	room service charge being deducted from per diem allotment (TXN 2004)		
TXN Number			
Cost Code	731085		
Reason Assigned	Reports To		
04/07/2018	Toll	430006	5.00 USD
	430006 Disbursements		
	110005 University Operating	60 Institutional Support	
	Unrestricted		
Business Purpose	Networking and community building with thousands of peers; boost productivity with advanced business processes. Learn new processes and keep current on changes in Banner Finance; focus will be Banner 9, including self-service and Chrome River.		
Description	toll to PA airport		
TXN Number			
Cost Code	731085		
Reason Assigned	Reports To		
!! Compliance Warning !!			
Toll Response	Receipt required for this expense no receipt		
04/07/2018	Taxi / Shuttle	430006	40.00 USD
	430006 Disbursements		
	110005 University Operating	60 Institutional Support	
	Unrestricted		
Business Purpose	Networking and community building with thousands of peers; boost productivity with advanced business processes. Learn new processes and keep current on changes in Banner Finance; focus will be Banner 9, including self-service and Chrome River.		
TXN Number			
Cost Code	731085		
Reason Assigned	Reports To		
Receipts	View		
04/07/2018	Per Diem Wizard	430006	48.00 USD
	430006 Disbursements		
	110005 University Operating	60 Institutional Support	
	Unrestricted		
Business Purpose	Networking and community building with thousands of peers; boost productivity with advanced business processes. Learn new processes and keep current on changes in Banner Finance; focus will be Banner 9, including self-service and Chrome River.		
Override Tkpr	Stacey Harnett		
Cost Code	CC1		
Reason Assigned	Reports To		

04/12/2018	Registration Fee	430006	695.00 USD
	430006 Disbursements		
	110005 University Operating	60 Institutional Support	
	Unrestricted		
Business Purpose	Networking and community building with thousands of peers; boost productivity with advanced business processes. Learn new processes and keep current on changes in Banner Finance; focus will be Banner 9, including self-service and Chrome River.		
Website			
TXN Number	24236		
Conference	Ellucian		
Cost Code	731085		
Reason Assigned	Reports To		
Receipts	View		
!! Compliance Warning !!			
Registration Fee Response	Possible duplicate entry confirmed		
Financial Summary			
		Amount (USD)	
Total Expense Report			3,054.31
Less Company Paid			2,331.62
Amount Due Employee			722.69
ACCEPT		RETURN	

>> [View Receipts](#) Report ID: 0100-2431-4878

To take action on these expenses, take either of the following steps:

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- OR **FORWARD** this email to approve@chromefile.com or return@chromefile.com with any comments at the top of the forwarded message.

To view this expense report or access the Chrome River application, [click here](#).