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|  |  |  |  |  |  |  |  |  | Quick Start Guide |
|  |  |  |  |  |  |  |  |  | www.chromeriver.com |

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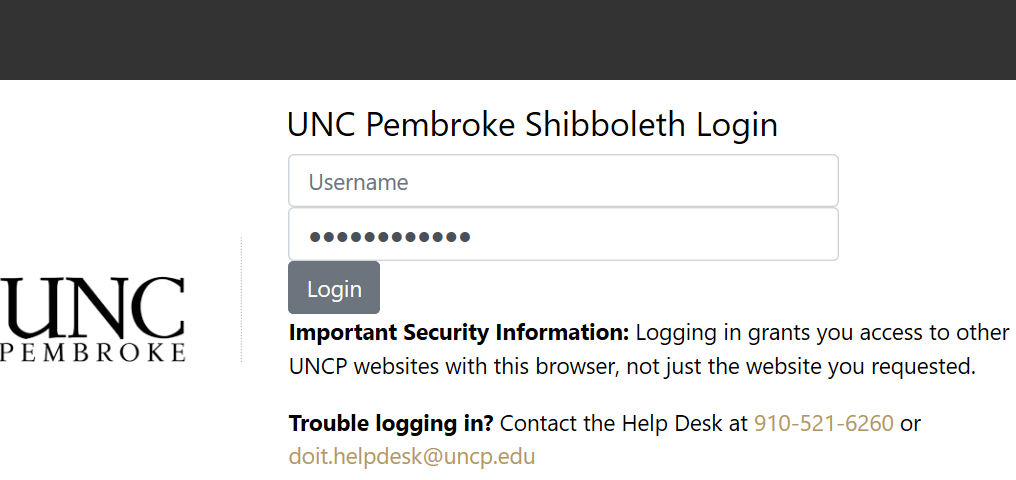
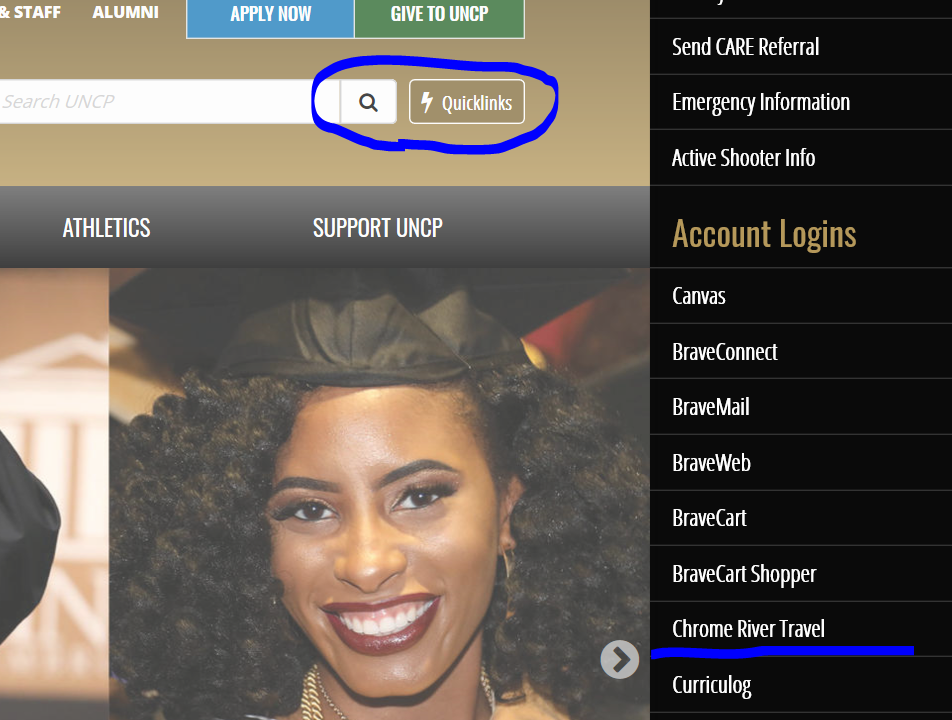
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# Chrome River EXPENSE: Quick-Start Guide

This guide will give you the basics needed to hit the ground running with Chrome River EXPENSE. Detailed user guides are available in the Chrome River Help Center, accessible via the “Help” link in the upper right-hand corner of the application.

## Launching and Logging in to the Chrome River Application – Now on single sign on through the UNCP website Quick Links:

Launch the Chrome River application from any web browser [www.uncp.edu](http://www.uncp.edu) and selecting Quick Links and Chrome River. You will supply the single sign on portal your network user name and password just as you do when you log into your pc in the morning.



## Creating a New Travel Authorization (Pre-Approval Report)

A new travel authorization is called a Pre-Approval in Chrome River and can be created for each new event.

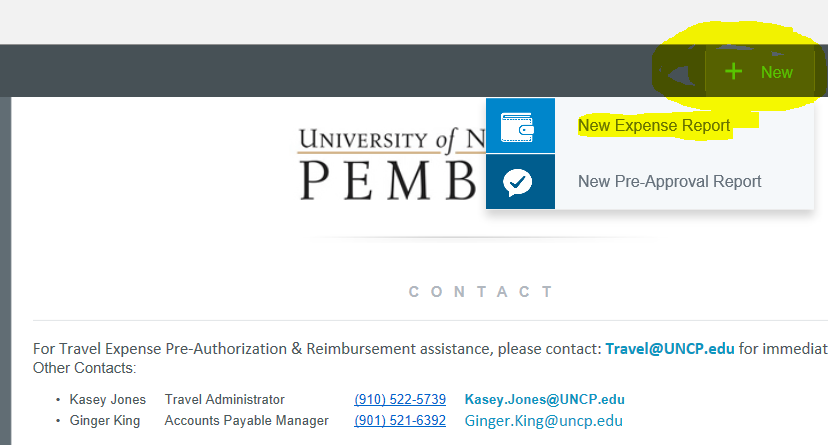
1. From the Home Dashboard click on the + sign in the top right hand side of the screen. Choose New Pre-Approval Report
2. Enter the travel information and allocation coding and then click on Save at the top right hand of the screen.
3. From the pre-approved travel type icons select your necessary items and add their details
4. When all expense types for the Pre-Authorization Report have been added, click on SUBMIT at the bottom of the form.

## 

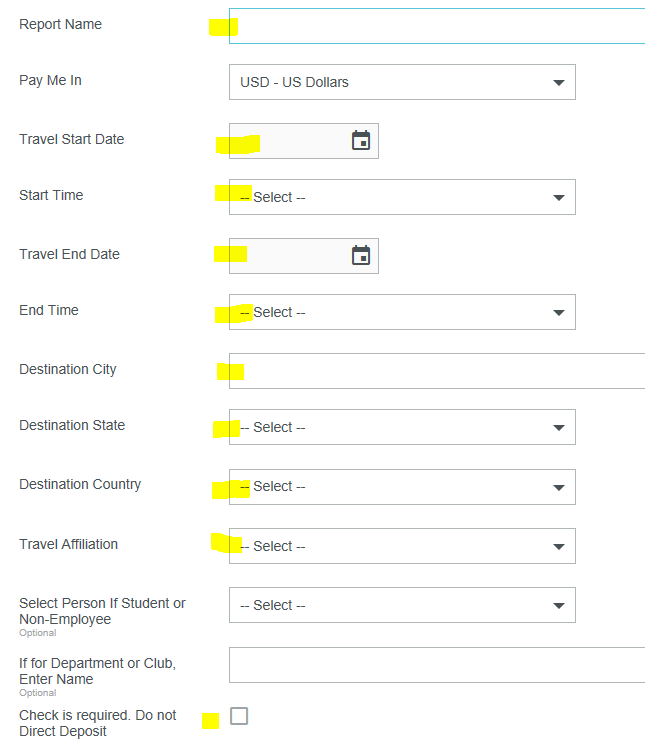
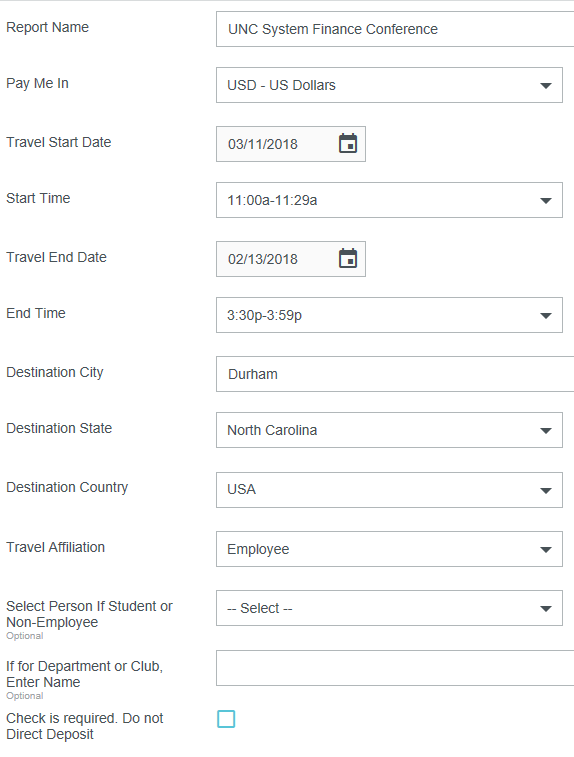
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## Creating a New Expense Report

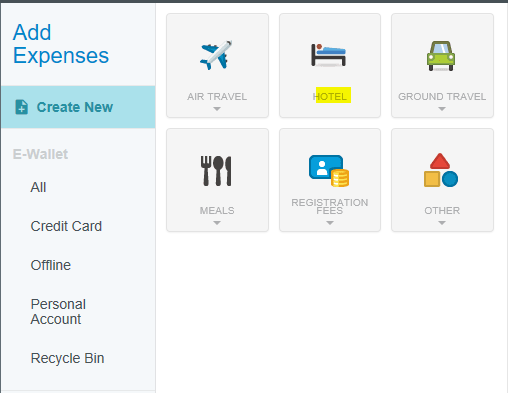
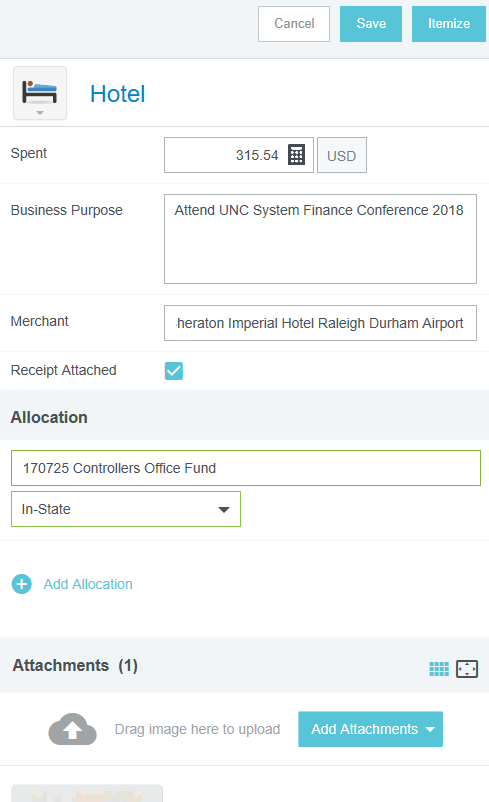
A new expense report can be created for each event, or events can be combined into a single report. From the Home Dashboard or the Expense Dashboard, click the **NEW EXPENSE REPORT** button. The **Expense Entry Screen** will appear



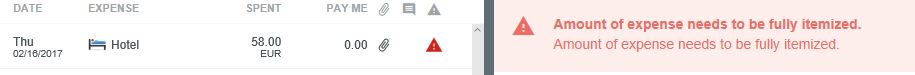
* 1. The Expense Header section stores all the basic information that applies to every expense listed on the report. Once you have filled out the form click save at the top right of this form.

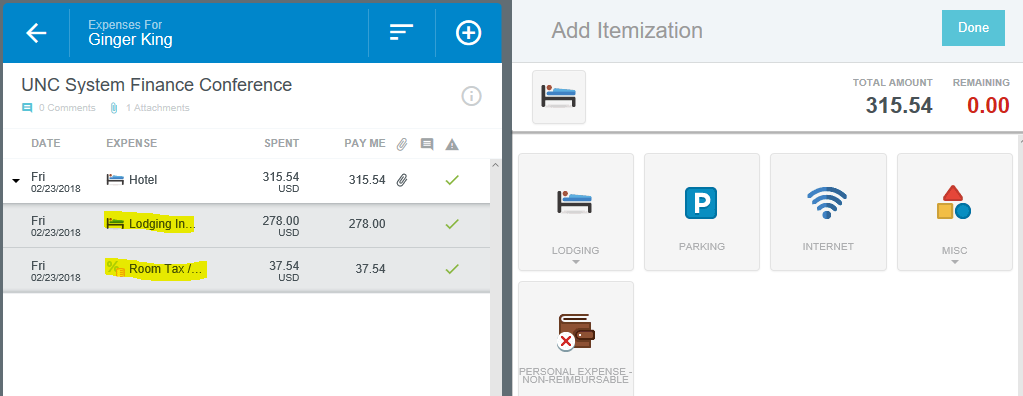
 

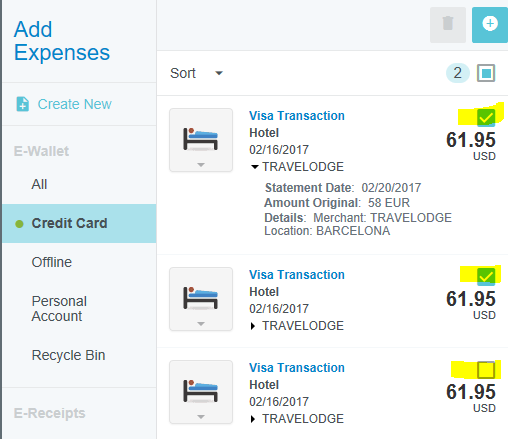
1. For your first expense line item, click on the icon button to the right that shows the options for adding expenses. There are two main ways expenses are added:
   1. Manually Created – Click on the icon to the right for the expense type you wish to add

\*Itemize expenses as the system prompts you.





* 1. Credit Card – Transactions are loaded daily and are available to apply to your expense report from your E-Wallet. Simply choose any pre-loaded transaction and check the box to the right of it (or multiples) to add them to your expense report. Check the amounts and expense allocations then save. 

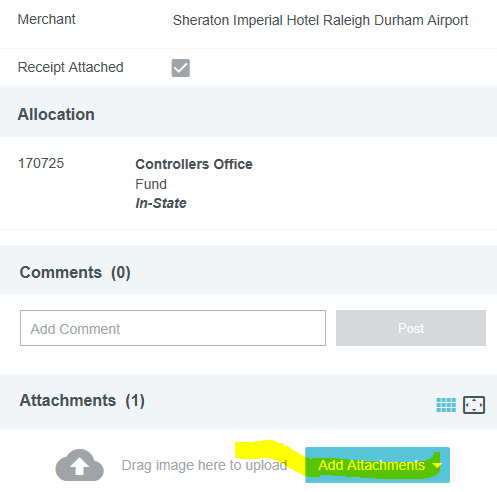
1. In the preview pane on the left side of the screen, you can see a summary of the expenses you have added and add notes, receipts and items to your expense report.

## Attaching Receipt Images

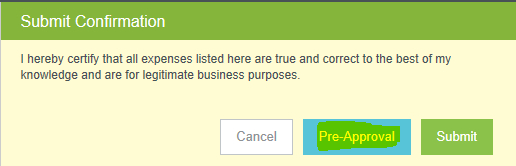
Receipt images may be uploaded as a PDF, JPG, or GIF, to be immediately attached to your expense report.

### Upload PDF or JPEG Receipts

If you choose to upload PDF receipts, the maximum size for a single upload is 5 MB, and the combined size of all the PDF, JPG, or GIF uploaded must be 100 MB or less.

1. **From Within the Expense Report:** On the Expense Entry Screen, click on the **RECEIPTS**. Click on **Browse File to Attach** to attach your images file(s).   
   

## Submitting a Report

* To submit an open expense report, click **SUBMIT** in the lower right-hand corner of the Expense Entry Screen.
* To submit the expense report from the Draft Expenses List, highlight it in the grid on the Expense Dashboard. Click **SUBMIT** in the navigation bar.
* After the expenses have been added to the report, click **SUBMIT** if you are done and choose to match the expense to the Pre-Approval that was done for it. Or click **SAVE/CLOSE** to be taken back to the Expense Dashboard. 

After you click **SUBMIT**, you will be prompted to certify that the expenses are correct and for legitimate business purposes.

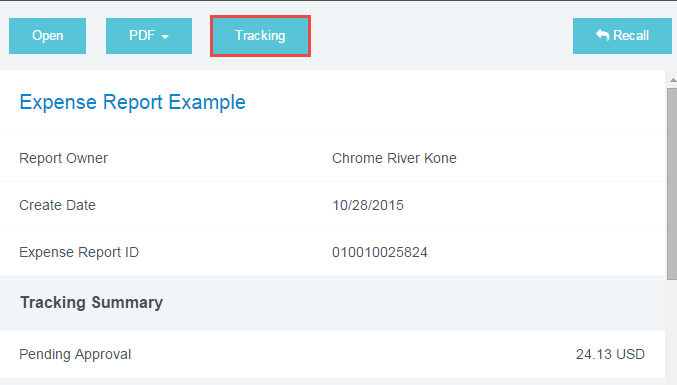
* Clicking **SUBMIT** again will send the report to the first step in the approval routing process.

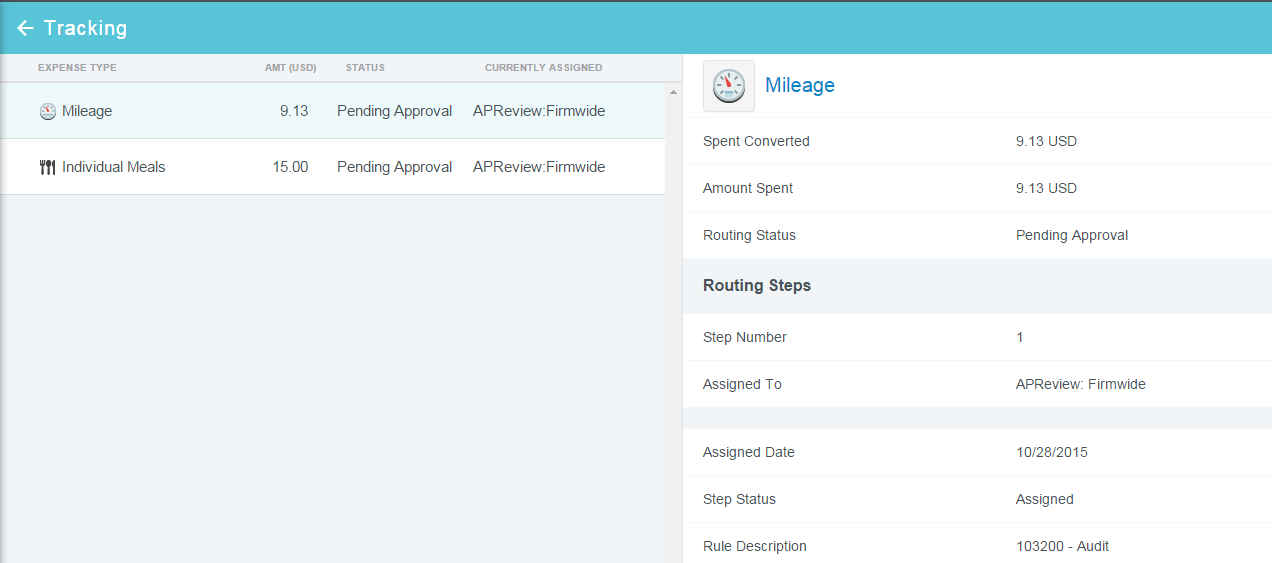
### Policy Compliance Warnings & Violations

A breach of policy will trigger a warning or violation message when you click SUBMIT.

* A compliance **warning** indicates that additional information is required before the expense can be submitted for approval and processing. Click on the red warning symbol and either modify the data or enter a reply. Then click **SAVE** to proceed.
* A compliance **violation** indicates that the expense cannot be submitted for approval and payment based on the company’s policies as defined in the system.Click **CANCEL** on the Submit screen, make any required changes, and select **CLOSE** or **SUBMIT** again.

## Report Tracking

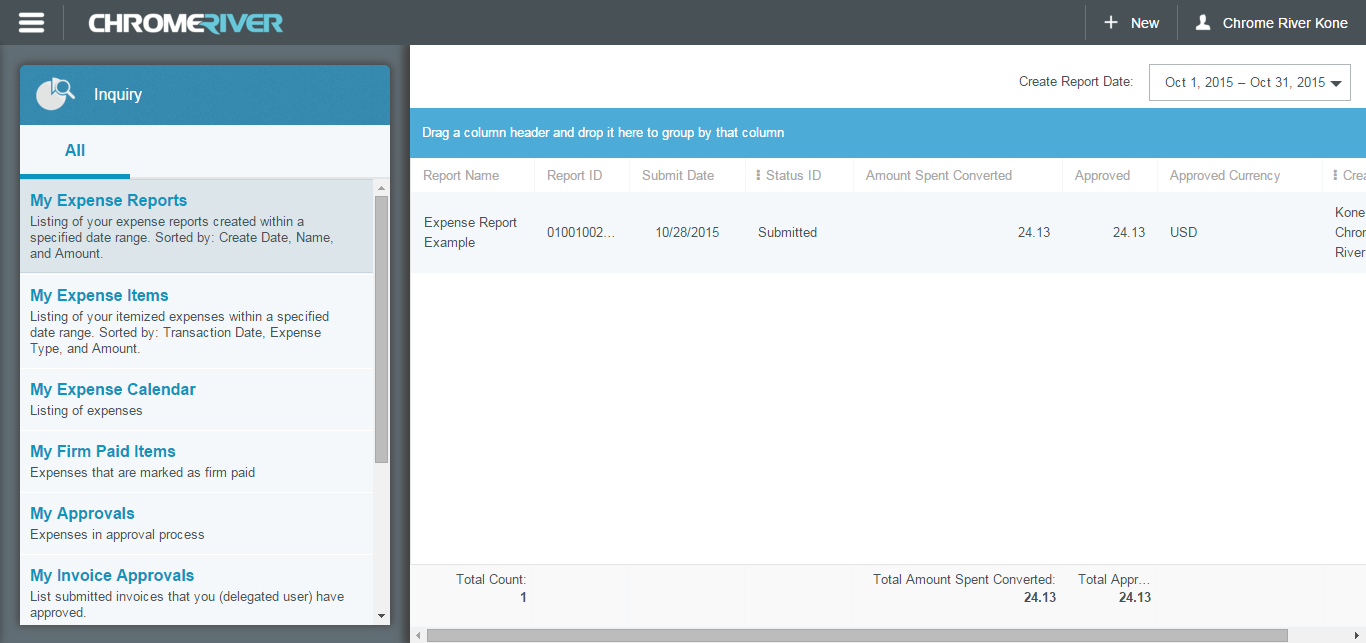
Once the expense report has been submitted, it will appear in the Submitted Expense Reports list. From here, you can track its progress through the approval routing process by highlighting the report and clicking **TRACKING**.  




## Inquiry Reports

The Inquiry Dashboard allows you to create reports and perform quick inquiries on all your activity by category: expense reports, expense items, delegates, calendar, credit card items, firm-paid items, approvals and paid expenses.

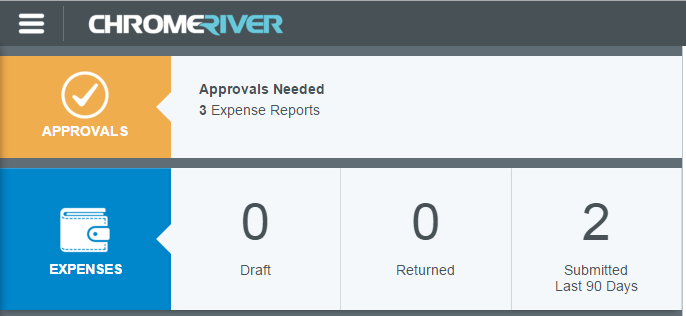
1. Click on **INQUIRY** from any Dashboard.
2. Under the Reports tab, select the report you would like to generate.
3. Select the criteria for the report

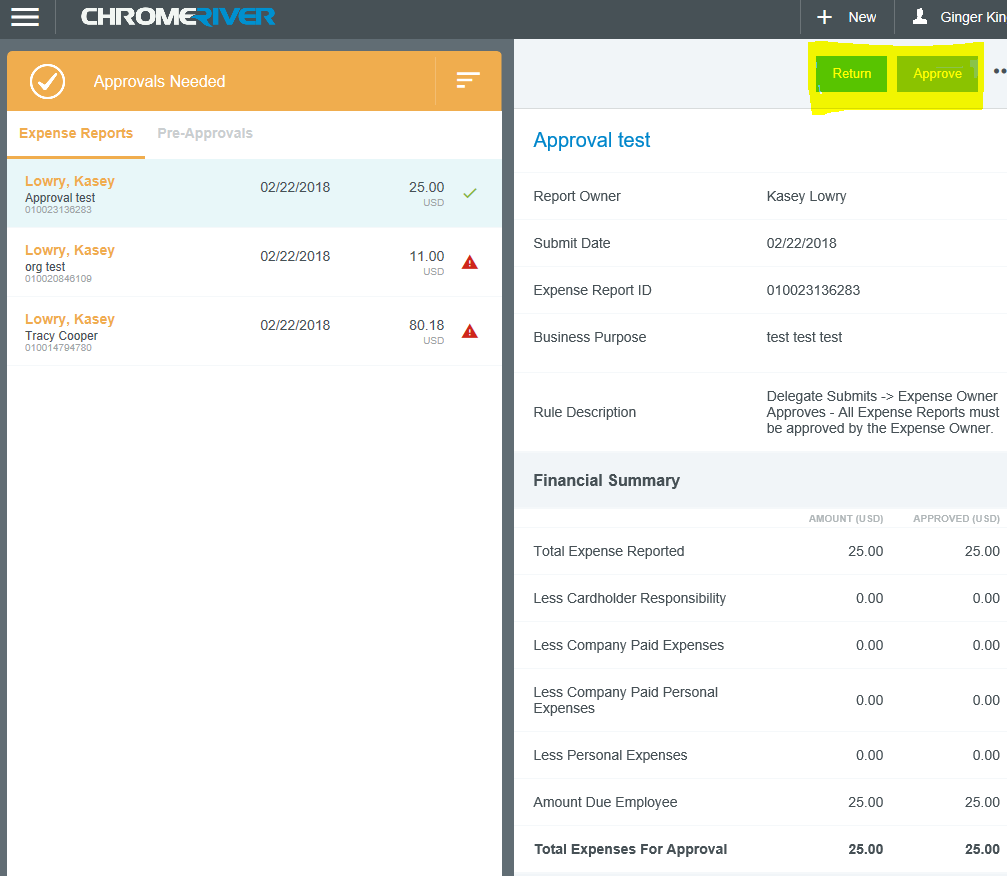


## Expense Approval

If you are part of the approval process, Chrome River EXPENSE makes this very important task easy by allowing you to approve expenses online, by email, or via the mobile app. The first two methods are covered below; mobile app approval will be covered in the Mobile Expenses section.

### Approve Online

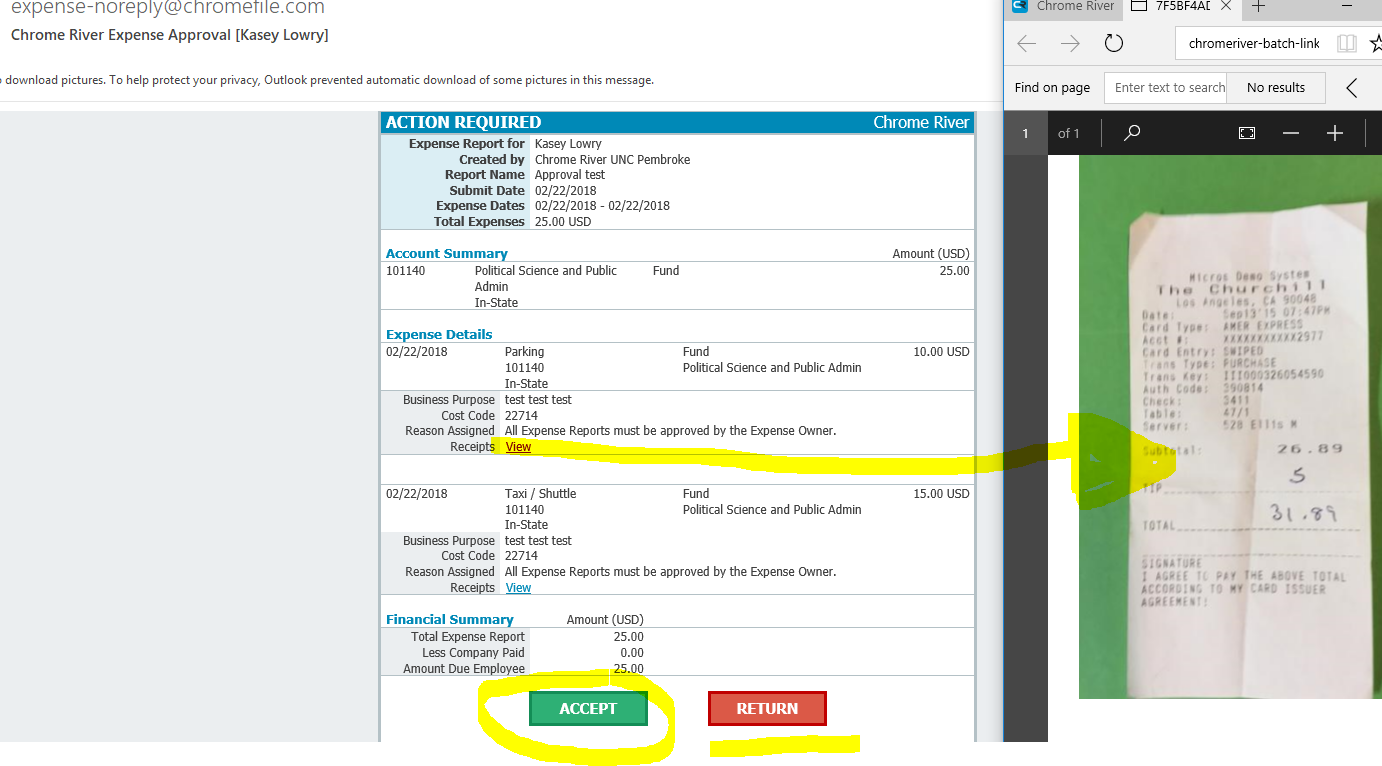
1. Log in to Chrome River EXPENSE and navigate to the Approval Dashboard.   
   
2. The Approval screen shows all the reports waiting for your approval. Highlight an expense report and click **OPEN** to review it.
3. The Expense Approval Screen lists each line item that requires your approval on the left and provides expense details, notes and receipt images on the right.
4. You can review, adjust, or return each line item individually by highlighting it in the list.
   1. Clicking **ADJUST** will open the expense item so that you can change the approved amount, business purpose, and/or cost center. You may also add a note.
   2. Clicking **RETURN** will send the expense item back to the expense owner.



1. When you have finished reviewing the expense, click **SUBMIT** to pass the approved expense line items on.
2. Clicking **RETURN REPORT** will send the entire expense report back to its owner. You will be required to provide an explanation and click **SUBMIT** again.

### Approve or Return by Email

Chrome River will email you expenses that require your approval. You can only approve or return them with notes via this method—any adjustments must be made in Chrome River online. (Please excuse the fact that fictitious receipts were used for examples so they do not match the report)



* Forwarding the email to [approve@chromefile.com](mailto:approve@chromefile.com) is equivalent to clicking **SUBMIT** in Chrome River EXPENSE online.
* Forwarding the email to [return@chromefile.com](mailto:return@chromefile.com) is equivalent to clicking **RETURN ALL** in Chrome River EXPENSE online.

If you receive approval emails in HTML format, you can approve or return expenses by clicking the green **ACCEPT** button or the red **RETURN** button in the email itself.

## Using Chrome River on your phone for quick access

Simply go to the [www.uncp.edu](http://www.uncp.edu) Quick Links to log in.