2019

Chrome River

HOLLY GARRETT, TRAVEL ACCOUNT SPECIALIST
812-237-3541
Holly.Garrett@indstate.edu

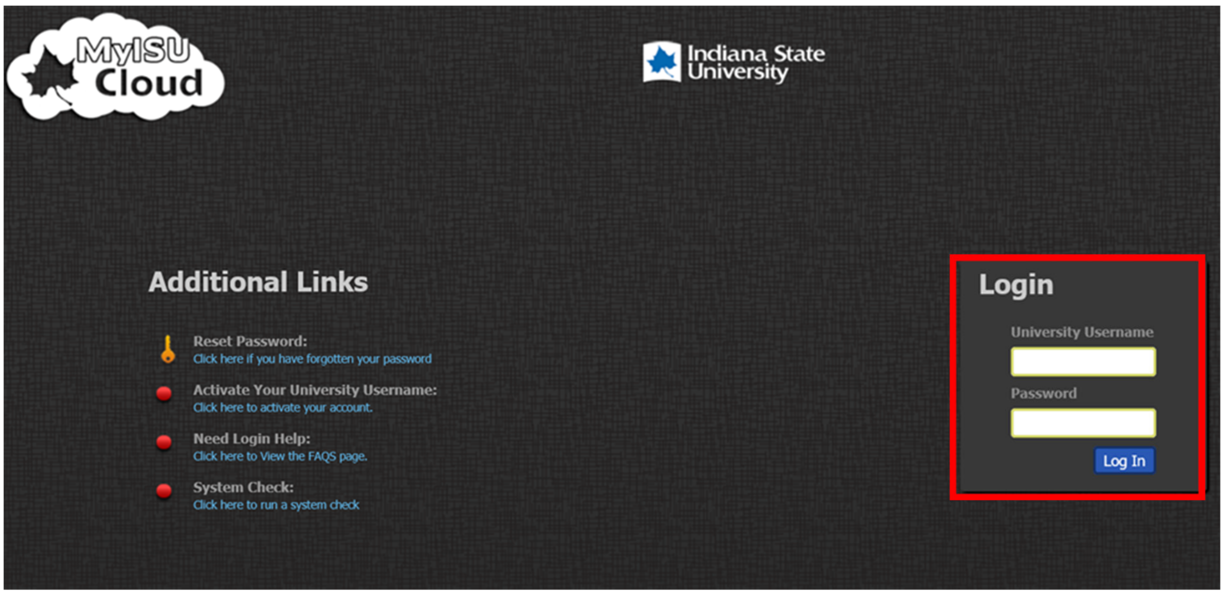
LESLIE WHEELER, FINANCIAL SYSTEMS ANALYST
812-237-3536
Leslie.Wheeler@indstate.edu

Contents

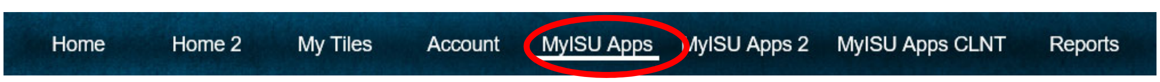
Log into Chrome River

From the **indstate.edu** homepage select **MYISU**

The following screen will appear. Login to your portal using your University Username and Password:



Select MyISU Apps from the tool bar at the bottom of the page:



Select the Chrome River Badge:

Assign a Delegate in Chrome River

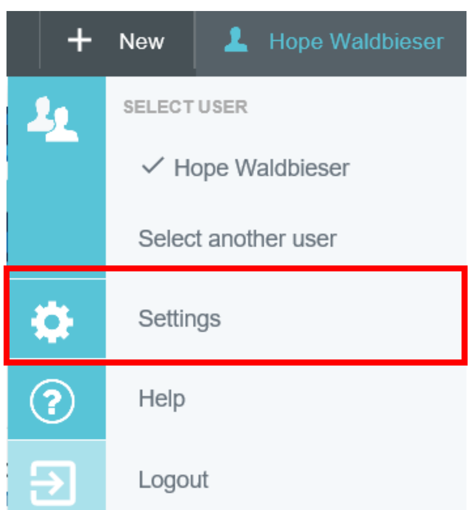
If another ISU employee helps you process your travel authorizations and reimbursement request, then you will need to set the individual up as a **Delegate** in your Chrome River profile. Chrome River requires you, the Traveler, to authorize the Delegate; Delegates cannot assign themselves the role. You may set up more than one Delegate. The delegate will receive copies of any email notifications regarding rejection or adjustment of reports created for the user. However, the delegate will not be able to approve expenses that are routed to the user.

What can a Delegate do for you?

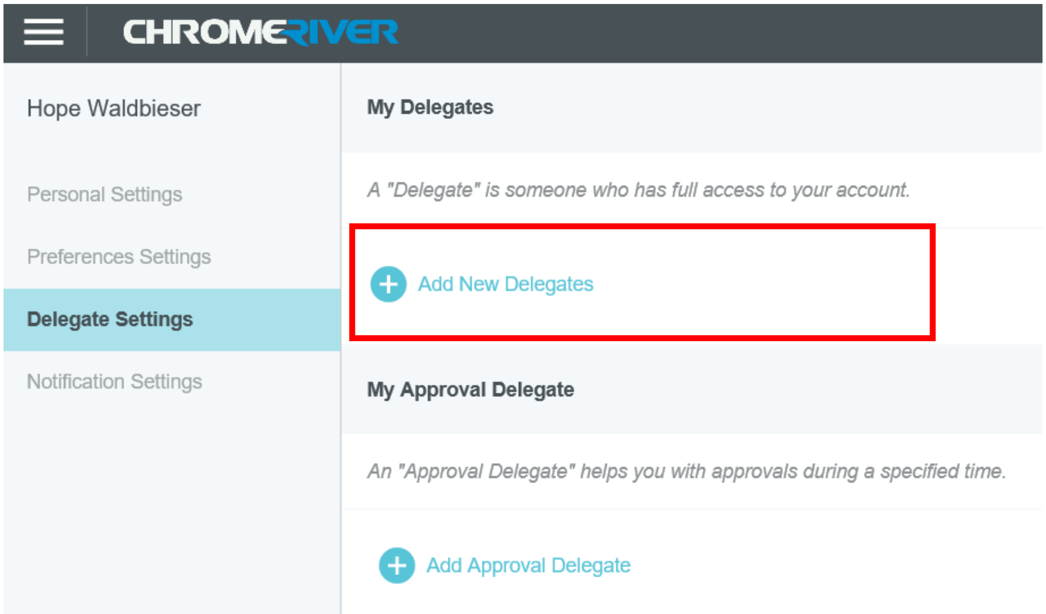
1. Create Pre-Approvals and Expense Reports for you
2. Access your Options menu, Home Dashboard and Inquiry Reports page
3. Receive copies of any e-mail notifications regarding approval, rejection or adjustment of reports

*Delegates do not have the ability to access your Approval screen

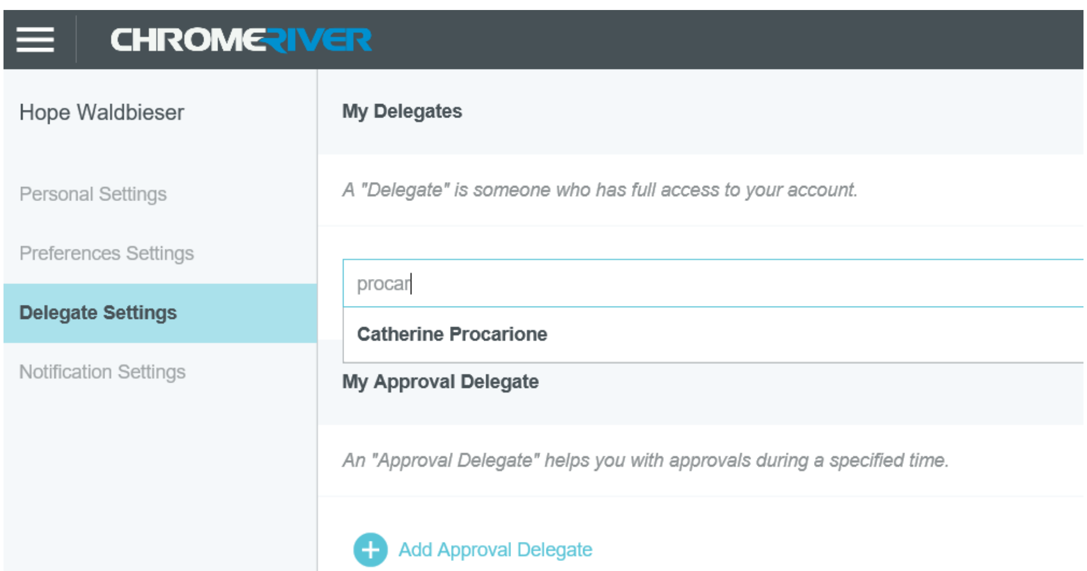
To authorize another user to work as your delegate, tap your name in the upper right corner, then tap **Settings**.



Tap **Delegate Settings,** then tap **Add New Delegates.**



Start entering the user's name, then select the correct name from the drop down list of potential delegates.



The user will now be able to select you from his or her own delegation list and create expenses on your behalf. To revoke a user's ability to act as your delegate, tap the X next to his or her name in the My Delegates list.

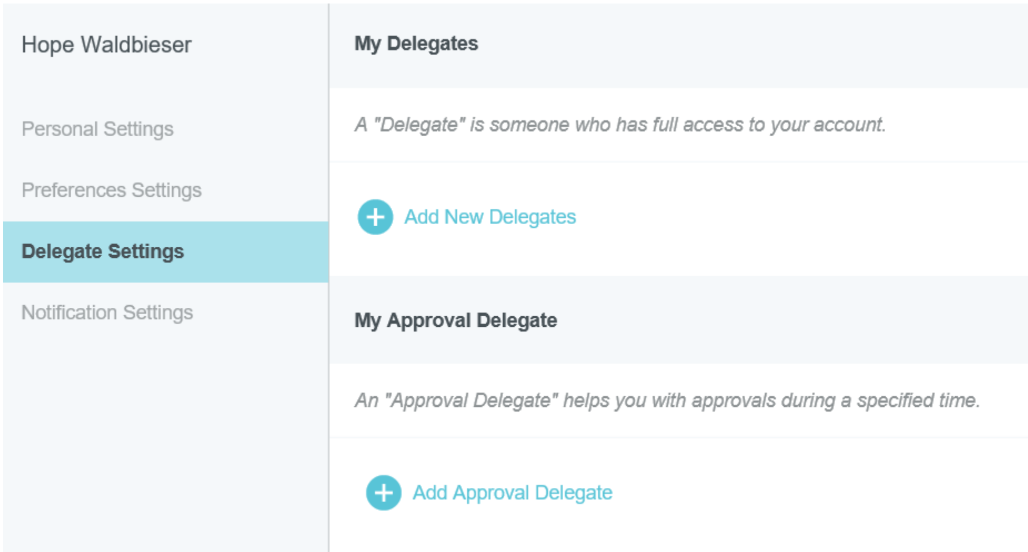
For Delegates: You will then see your travelers' names in your "Select Another User" list. As a Delegate, you will receive all email notifications for your travelers, regardless of who created the Expense Report.

Roles and Responsibilities:

- Completes Pre-Approval and Expense Report on behalf of the Traveler based on information and receipts provided by the Traveler.
- Enters Pre-Approval required line items to include estimates of expenses.
- Uploads or scans receipts when received from Traveler.
- Assigns the correct receipts to each expense.
- Submits Pre-Approval or Expense Report to the Traveler.

Assign an Approval Delegate

If you need to have another user temporarily approve expenses on your behalf, tap your name in the upper right corner, then tap **Settings**. In Delegate Settings, under My Approval Delegate, tap **+ADD Approval Delegate.**



You will be able to choose the approval delegate from a searchable list and set the Start and End dates for the authorization to approve expenses on your behalf.

The delegate's name will appear with the range of dates during which he or she may approve expenses on your behalf. You may only have one approval delegate working for you at a time.

Chrome River will send an email to the approval delegate describing the routing changes that will occur during this period. All expenses and pre-approvals assigned to you will automatically queue up for the delegate to approve. Regular approval emails will also be sent to the delegate.

Remove Approval Delegate

At the end of the period you specified, the system will automatically de-authorize your approval delegate, and the approval process will return to default status. However, all reports and pre-approvals that were routed during that period remain in the approval delegate's approval queue for further action.

If you return earlier than expected or simply wish to revoke your approval delegate's access, tap the red circle next to his or her name.

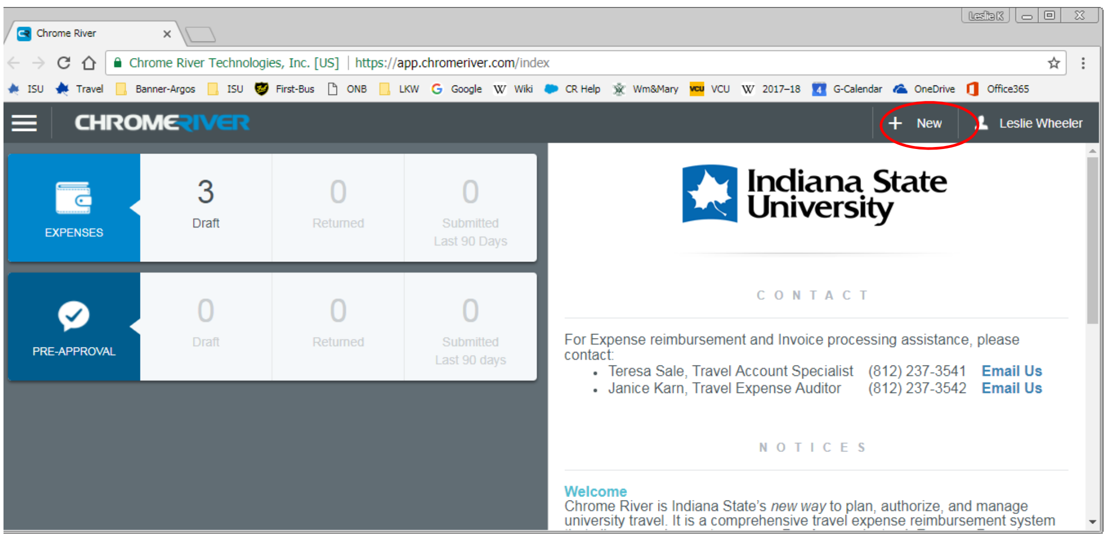
Pre-Approval reports are required to be submitted and approved before any travel expenses are incurred and before the requested trip begins. Chrome River allows you to enter your estimated expenses quickly and submit that request to the appropriate staff to approve the request for travel. The Chrome River system has been configured to adhere to all of ISU's travel policies and procedures.

Creating a Pre-Approval

Log In

To access ISU's Chrome River system you must log in through your MyISU portal and select the appropriate tile.

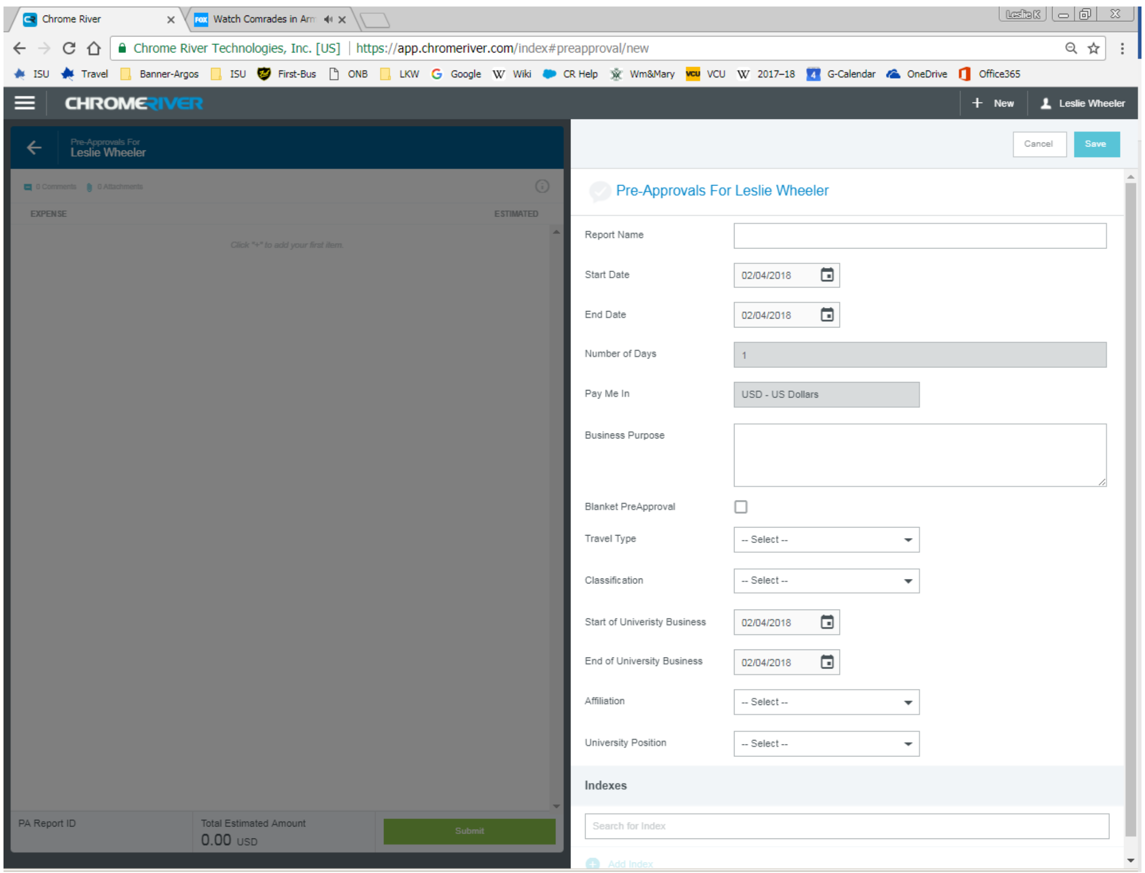
This will take you to the Chrome River Dashboard.



New Pre-Approval Report

From the Dashboard, tap the **+NEW** button in the upper right corner and select **New Pre-Approval Report** from the drop-down menu.

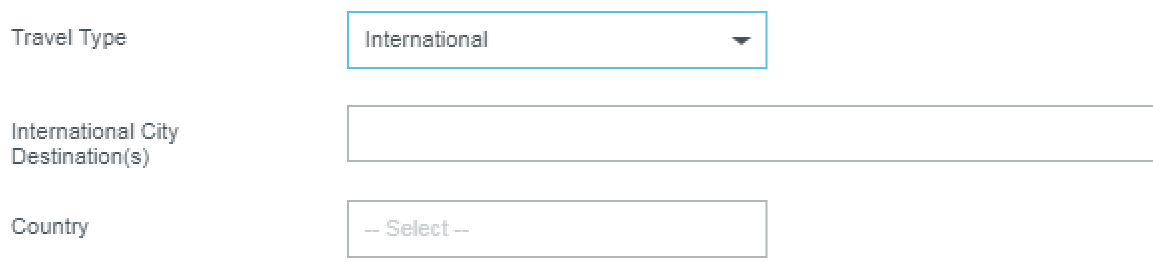
The Pre-Approval Header section will appear. The Header section stores all the basic information that applies to every estimated expense that will be on the report. The information entered here is also used to determine who the approver(s) are for your requested trip. This is an interactive on-line form, meaning that the way you answer the prompts on this form may cause additional questions to appear.



- Report Name: This is any descriptive name for your trip. You must include the name of the conference, meeting or event. This is used in tracking and inquiry to help identify your report. You will need to use the same description when you create your Expense Report after your trip.
- Start Date: This is the date you intend to start your trip.
- End Date: This is the date you intend to return from your trip.
- Number of Days: This is a calculated field representing the duration of your trip.
- Pay Me In: This is a fixed value – ISU always tracks expenses and reimburses in US Dollars.

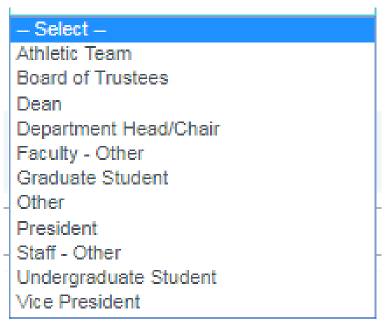
- Business Purpose: You are required to provide a detailed explanation as to why you are traveling.
- Blanket Pre-Approval: This is a checkbox to indicate if this Pre-Approval is for a blanket. A blanket Pre-Approval may be obtained for operational travel that is repetitive and a routine part of an individual's job. The blanket PA would be restricted to that specific purpose and would only have to be filed once for a set period of time (i.e. fiscal year) or a set amount of money to be encumbered.
- Travel Type: Indicate if your trip is Domestic or International.
    - For Domestic Travel, the system will prompt you for the City and State of your destination.

    - For International Travel, the system will prompt you for the City and Country of your destination.



- Classification: You must select the type of trip you are taking from the following selection available on the drop-down menu.

- Start of University Business: This is the start date of the business portion of your trip. Because you may elect to add personal time to your trip this will not always be the same start date as selected above.
- End of University Business: This is the end date of the business portion of your trip. Because you may elect to add personal time to your trip this may not always be the same end date as selected above.
- Affiliation: Choose either Faculty/Staff or Non-Employee from the drop-down menu.
- University Position: Select the option from the drop-down list that best correlates to the traveler's position at the University. This value will help determine the individuals who must approve the trip.



- Cash Advance: This field will only appear for Field Trips and for International trips. Cash Advances will only be paid on approved trips and a maximum of 7 days prior to departure.
- Index: Please choose the Index that will be charged for the trip if approved. The system will bring up a list of indexes that match the character string you type. If you begin to enter the index you will be using it should appear in a drop down list.

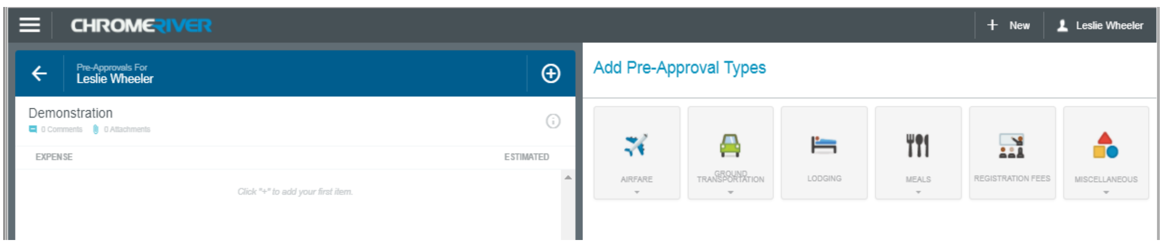
Once you have filled out the required fields, tap **SAVE** in the upper right hand corner. The Add Expenses screen will appear.

Adding Expenses

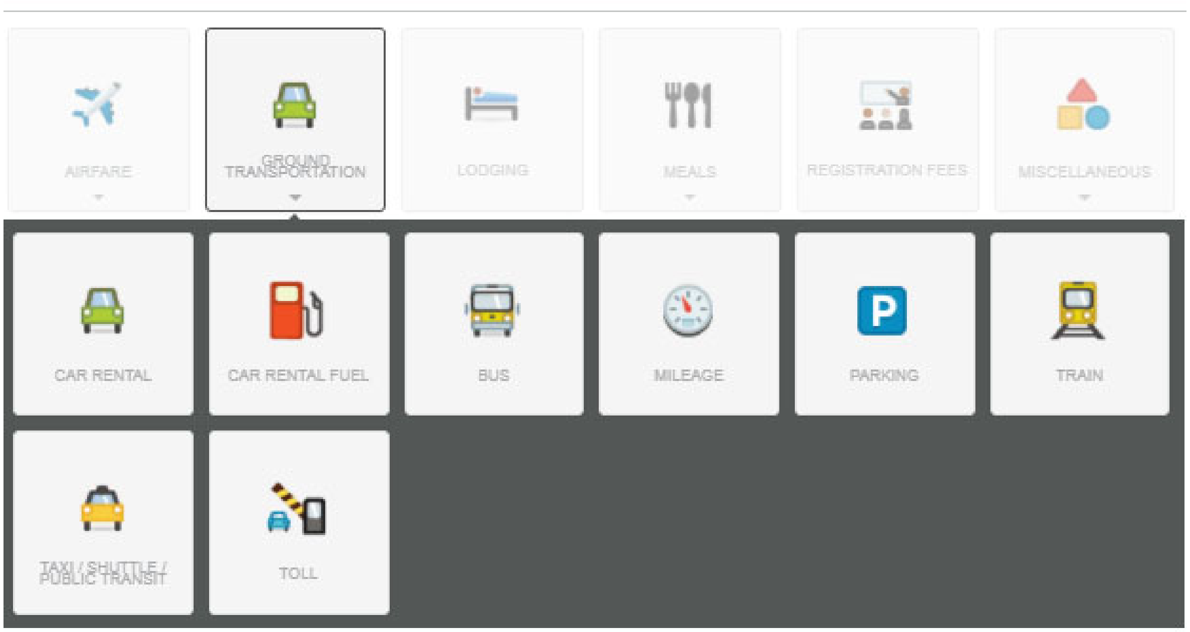
The **Adding Expenses** screen offers you several types of expenses.

- If the Adding Expenses screen is no longer visible at any time and you need to add additional expenses, you can re-open it by clicking on the **Plus** sign at the top of the left half of the screen.

- Special Note for Blanket Pre-Approvals: If you indicated that your travel is a Blanket Pre-Approval in the header section but do not know what your actual expenses will be, select the MISCELLANEOUS expense type Icon and then click on MISCELLANEOUS-OTHER to enter a dollar amount and description.

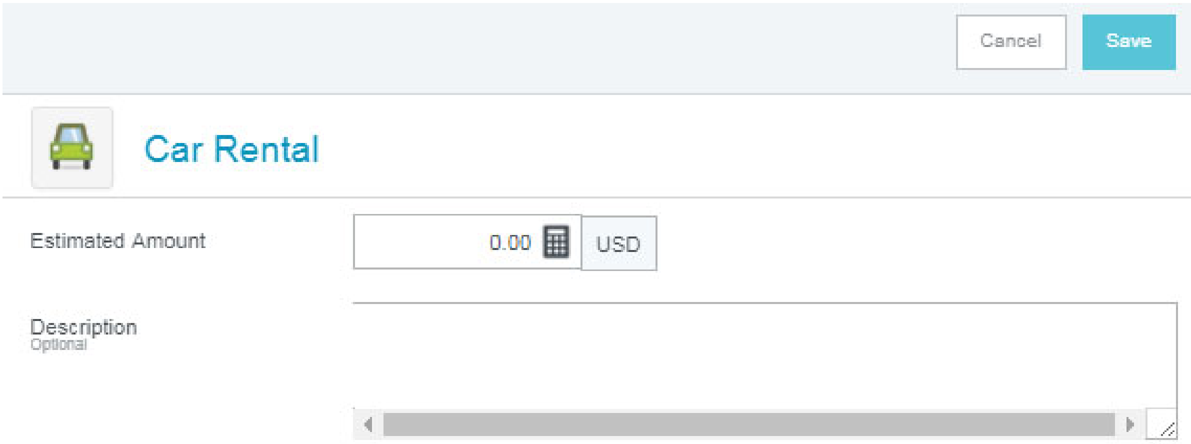


Click on each applicable icon to see a selection of specific expenses associated with that category.

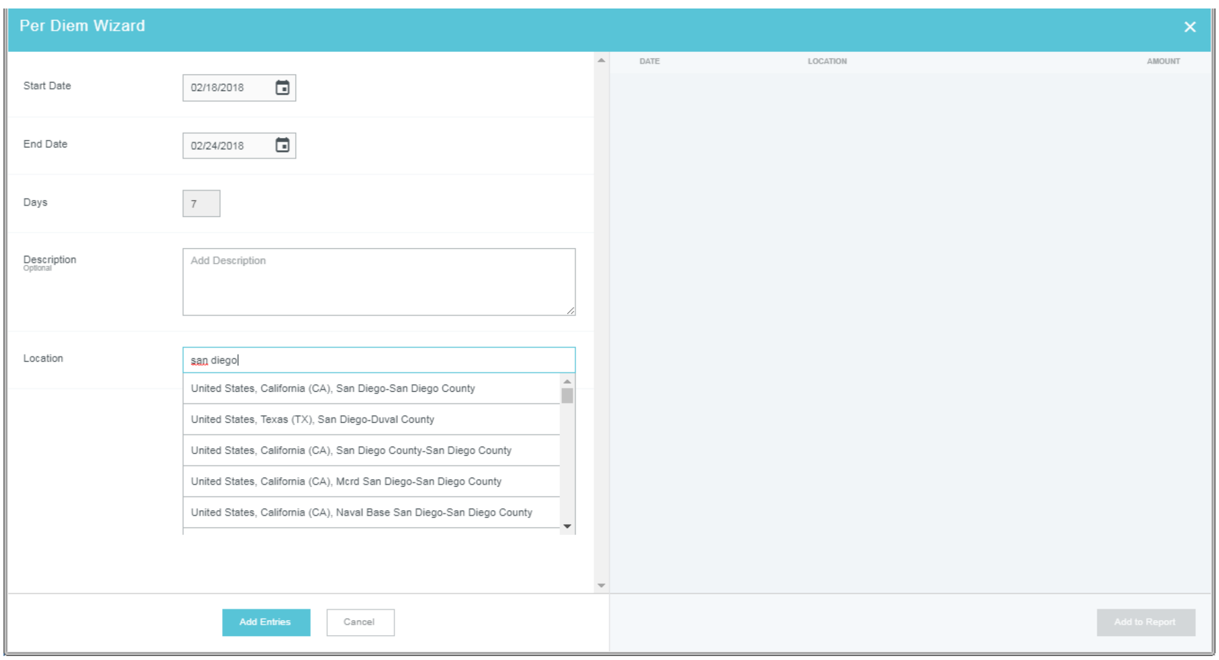


Choose the type of expense you want to add to your report and a new screen will open for you to enter details about the estimated expense.

Example 1: Car Rental



Example 2: Per Diem (designed to be for one or many days based on dates entered)



When finished, choose **SAVE** in the upper right corner or **Add Entries** in the lower left and then **Add to Report** on the lower right depending on the expense type.

Submitting your Report for Approval

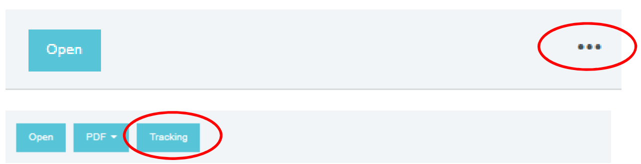
Once you have finished adding all of your estimated expenses, submit the report for approval by choosing the green **Submit** button along the bottom of the screen. A prompt will pop up asking you to verify that all the information you entered is correct, click Submit again. The system will then automatically route your request for travel to the appropriate offices and personnel for the needed approvals.

Tracking the status of your Pre-Approval

To track your submitted pre-approval requests, tap on the **SUBMITTED LAST 90 DAYS** in the Pre-Approval Section of the Dashboard.

To access your submitted pre-approval requests from anywhere else in the interface, tap the **MENU** button or the **ChromeRiver logo** and then tap **RECENTLY SUBMITTED** in the Pre-Approval section of the drop-down menu.

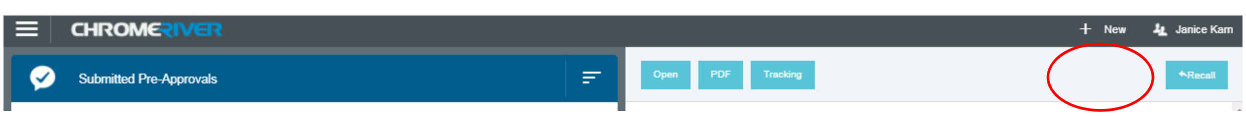
Find the pre-approval in the list and tap it to display the preview. Then tap the **three-dots** icon and select **Tracking** in the drop-down list. On wider screens, the **Tracking** button will appear instead of the three dots.



You may track the progress of the pre-approval request on the Tracking screen, including who it has been assigned to and the status of each step. If multiple routing step numbers are displayed, you may tap each one to see all the details for that step. Tap the **X** in the upper right-hand corner to return to the preview for that pre-approval.

Recalling a Pre-Approval

If you discover that your report is inaccurate or incomplete, you may recall a submitted pre-approval as long as it has not been fully approved. The **RECALL** button will not function for the pre-approvals with Expired, Applied, Partially Applied or Approved status. Note: The **RECALL** button is only accessible in the Preview, not if you open the pre-approval.



After hitting the RECALL button a confirmation screen will appear. Tap **YES**. The pre-approval will appear in your Draft Pre-Approvals list but will retain any notes that may have been entered during the incomplete approval process.

Returned Pre-Approval

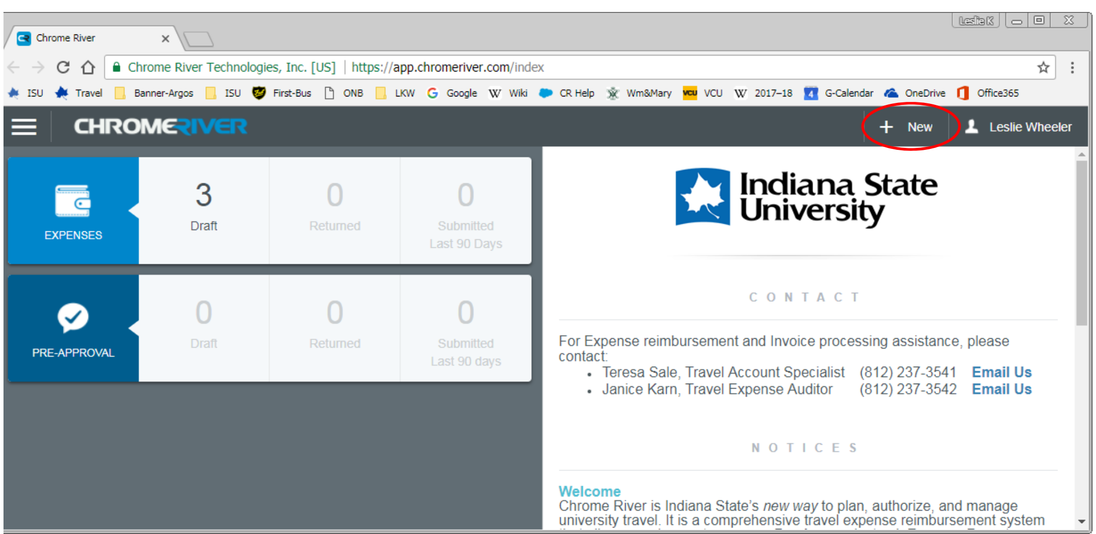
When an approver has returned (denied) a pre-approval request to the requestor during the approval process, it will appear in the Returned Pre-Approvals list on the Dashboard. A returned Pre-Approval can be re-submitted for approval after the concerns that had been raised are addressed. Alternatively, it can be deleted if this trip is no longer being planned.

Expense reports are required to be submitted within 30 days of the end of any business trip. Chrome River allows you to enter your actual expenses quickly and submit that to the appropriate staff to request reimbursement for your travel expenses and report any charges incurred on your Travel Card. The Chrome River system has been configured to adhere to ISU's travel policies and procedures.

Log In

To access ISU's Chrome River system you must log in through your MyISU portal and select the appropriate tile.

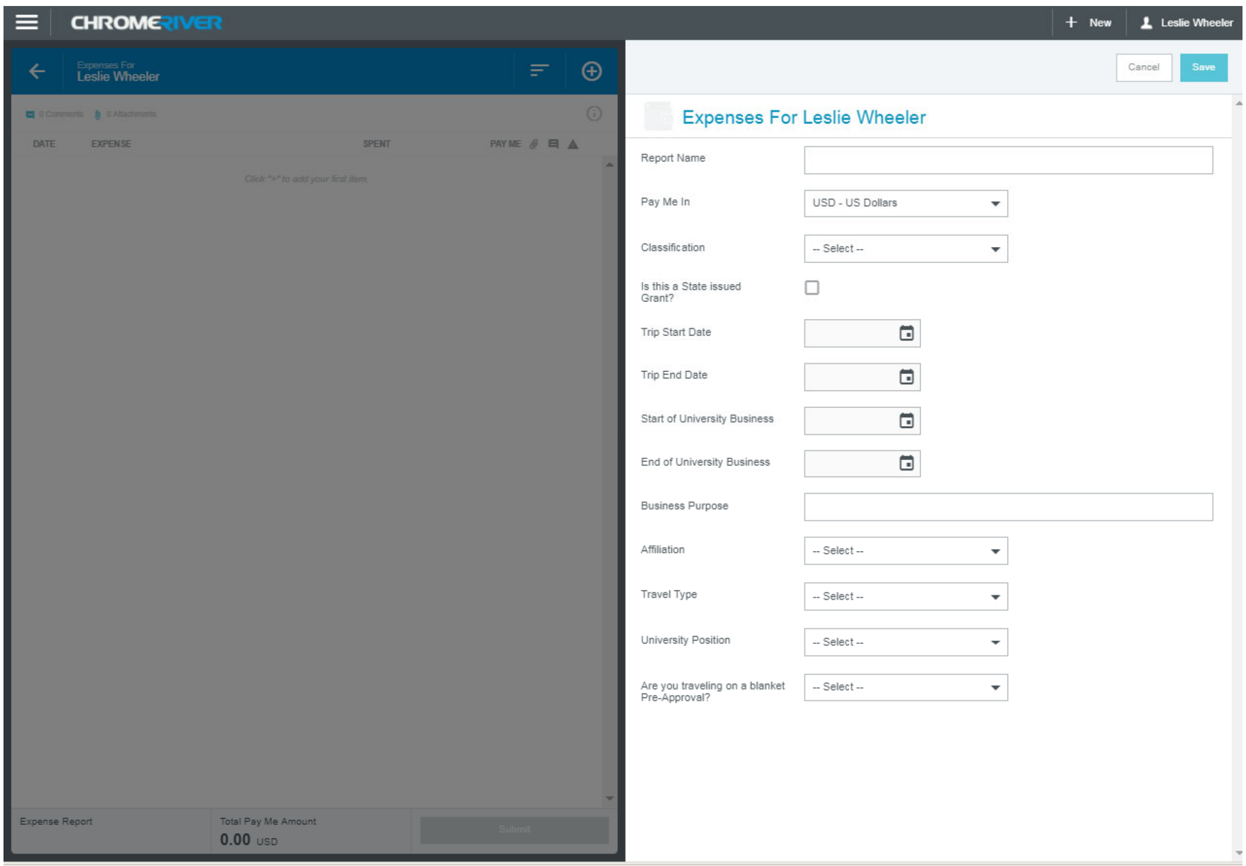
This will take you to the Chrome River Dashboard.



Create a New Expense Report

From the Dashboard, tap the **+NEW** button in the upper right corner and select **New Expense Report** from the drop-down menu.

The Expense Report Header section will appear. The Header section stores all the basic information that applies to every expense that will be on the report. The information entered here is also used to determine who the approver(s) are for your requested reimbursement. This is an interactive on-line form, meaning that the way you answer the prompts on this form may cause additional questions to appear.



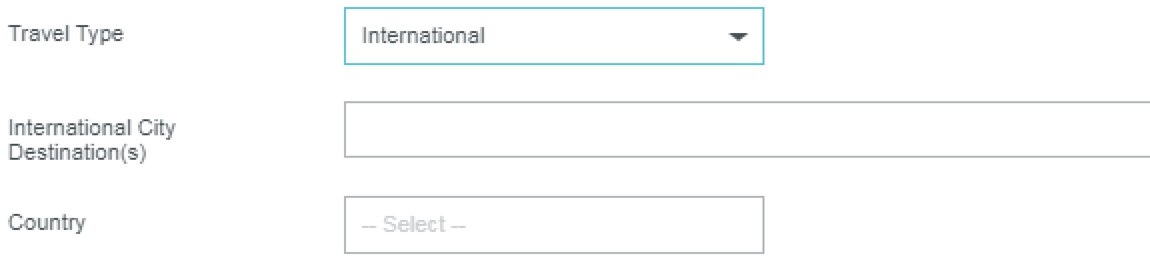
- Report Name: This is any descriptive name for your trip. You must include the name of the conference, meeting or event. This is used in tracking and inquiry to help identify your report. This description must match the name of the corresponding Pre-Approval request to facilitate the approval and processing of your request.
- Pay Me In: This is a fixed value – ISU always tracks expenses and reimburses in US Dollars.

- Classification: You must select the type of trip you are taking from the following selection available on the drop-down menu.

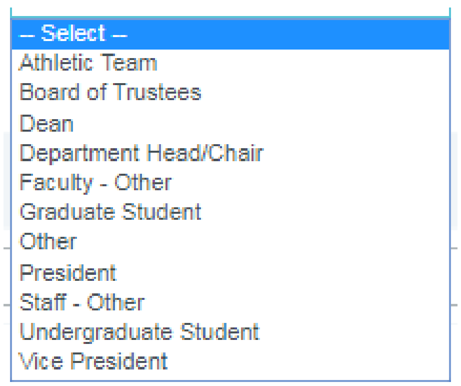
- Is this a State of Indiana issued Grant: This checkbox is used to indicate that the trip taken must comply with State of Indiana grant travel rules. These typically have a lower rate of reimbursement than federal grants or non-grant travel. This box is <u>not</u> used to indicate grants between departments / offices.
- Trip Start Date: This is the date you departed on your trip.
- Trip End Date: This is the date you returned from your trip.
- Start of University Business: This is the start date of the business portion of your trip. Because you may have elected to add personal time to your trip this may not always be the same start date as selected above.
- End of University Business: This is the end date of the business portion of your trip. Because you may have elected to add personal time to your trip this may not always be the same end date as selected above.
- Business Purpose: You are required to provide a detailed explanation as to why you are traveling.
- Affiliation: Choose either Faculty/Staff or Non-Employee from the drop-down menu.

- Travel Type: Indicate if your trip is Domestic or International.
    - For Domestic Travel, the system will prompt you for the City and State of your destination.

    - For International Travel, the system will prompt you for the City and Country of your destination.



- University Position: Select the option from the drop-down list that best correlates to the traveler's position at the University. This value will help determine the individuals who must approve the trip.

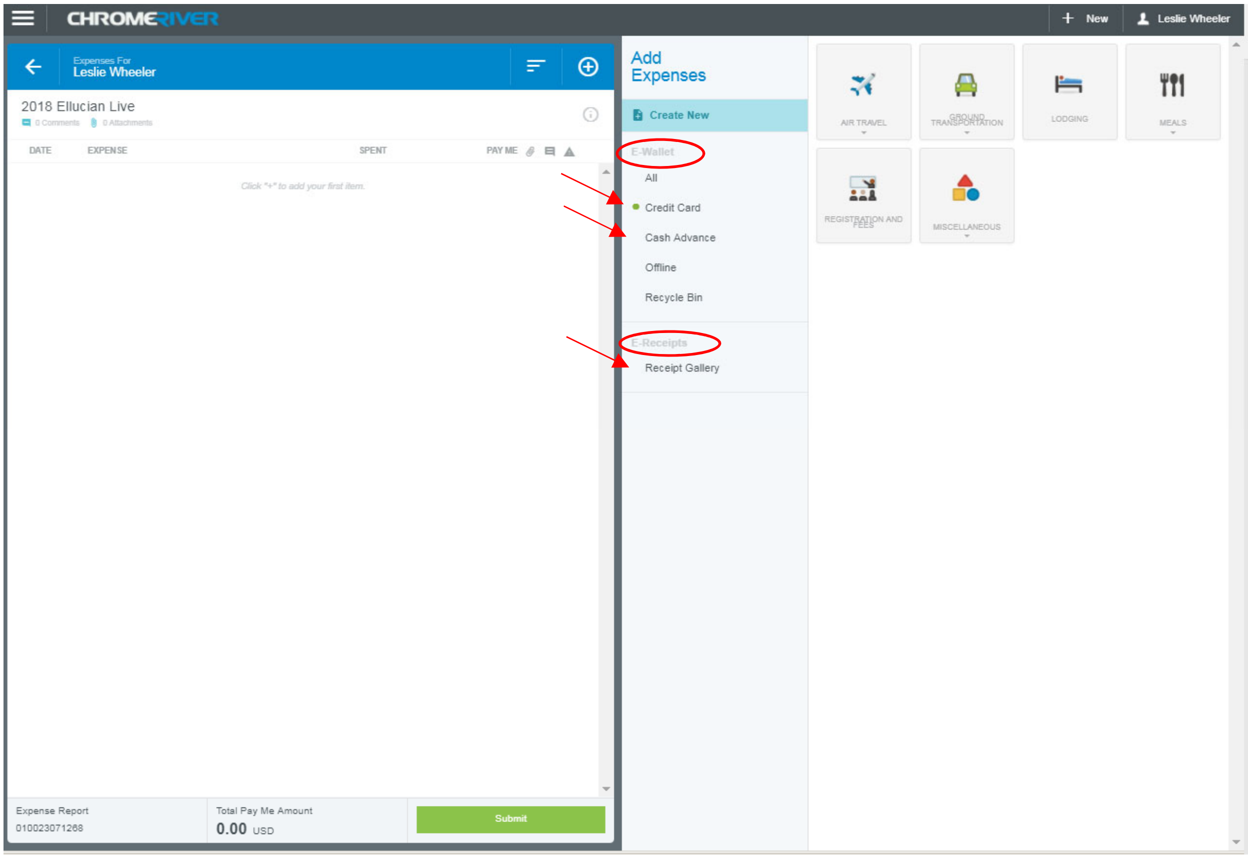


- Are you traveling on a Blanket Pre-Approval?: This is used to indicate if this trip was authorized with a blanket Pre-Approval. A blanket Pre-Approval may be obtained for operational travel that is repetitive and a routine part of an individual's job. Blanket Pre-Approvals cannot be used for conferences. The blanket Pre-Approvals would be restricted to that specific purpose and would only have to be filed once for a set period of time (i.e. fiscal year) or a set amount of money to be encumbered.

Once you have filled out the required fields, tap **SAVE** in the upper right hand corner. The Add Expenses screen will appear.

Expenses

The **Adding Expenses** screen offers you several types of expenses. It also shows e-Wallet and e-Receipt Galleries.

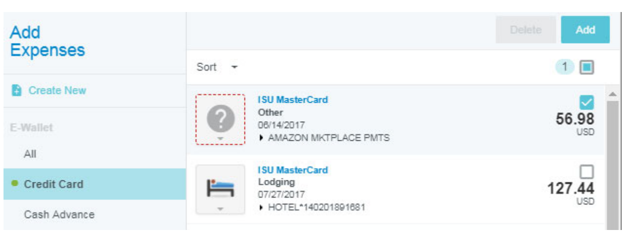


e-Wallet & e-Receipts Galleries

The e-Wallet is where you will find all of your credit card transactions from your ISU Travel Card, your outstanding cash advances and any receipts you sent into Chrome River via email. If any of these exist, their presence is indicated by the small green dot next to the title. In the example above, there are credit card transactions but no cash advances or receipts to attach to expense reports.

- Credit Card: Chrome River has access to the transactions from the ISU Travel Cards via JP Morgan Chase. These transactions are then routed to the appropriate user's account. When these charges are added to an expense report the system is able to automatically fill in data such as transaction date, amount, and type of expense.
- Cash Advance: Field Trips and International Travel are eligible for cash advances when needed. If a traveler has been granted a cash advance they must add that to an expense report, offsetting the amount to be reimbursed by the amount of the cash advance. If more money was issued on the cash advance than the actual expenses incurred, the traveler must repay that money first and attach the receipt issued by ISU to their expense report.
- Receipt Gallery: An email address can only be associated with a single Chrome River profile. This enables Chrome River to automatically route any receipts submitted via email to the correct user's account. Chrome River then uses OCR (Optical Character Recognition) to 'read' any receipt submitted and attempt to interpret the type of expense, the date and the amount. Thus when a receipt is added to an expense report much of the data entry may already be done for you.

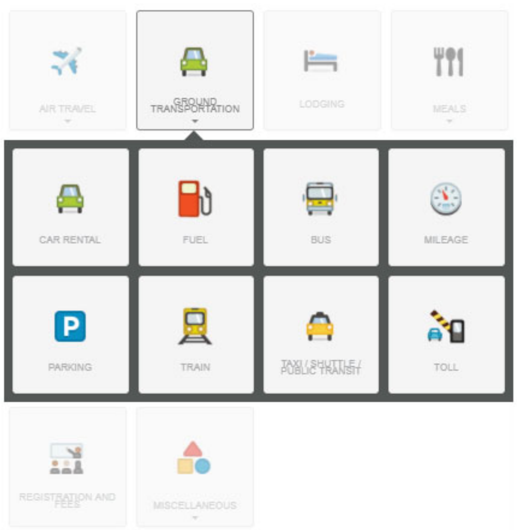
To add any of these transactions to your expense report, simply check the box next to the item in question and hit the **Add** button as shown below.



Adding Additional Expenses

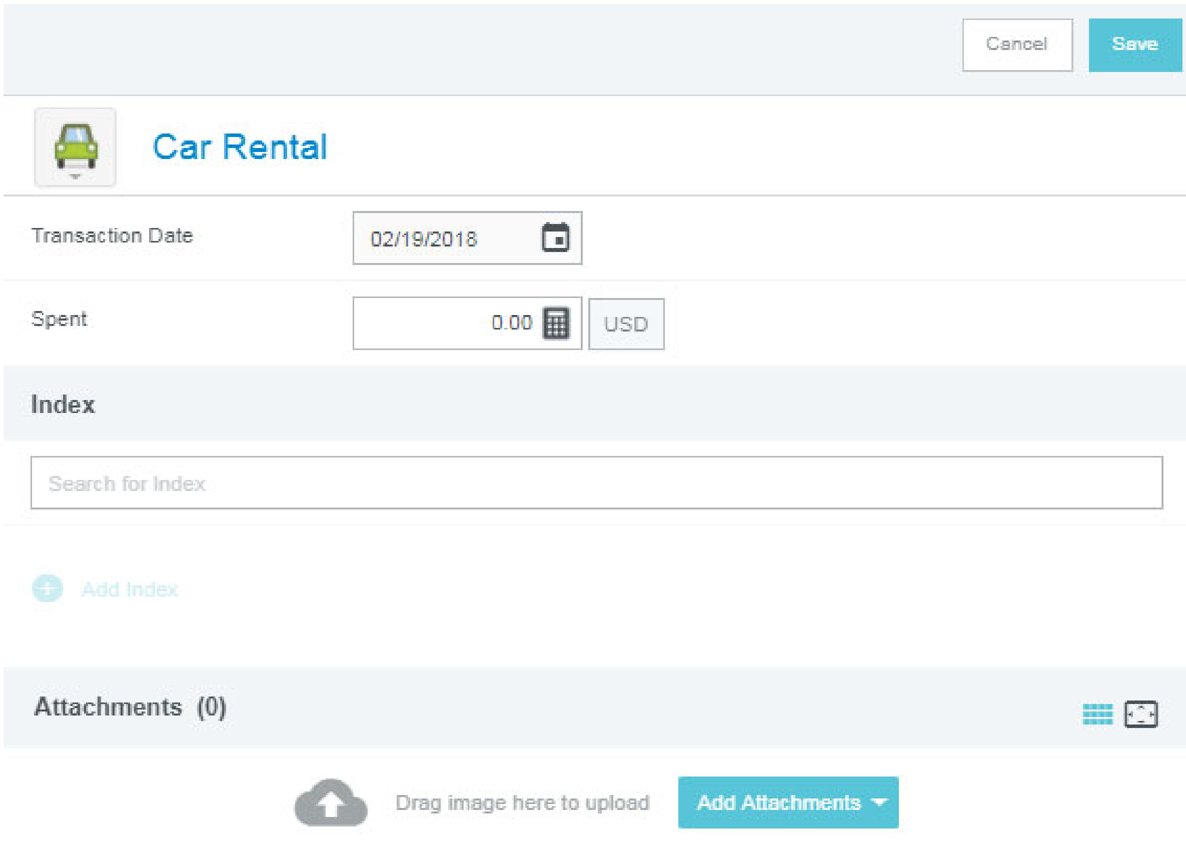
To add a Travel Expense, click on each applicable icon to see a selection of expenses associated with that category.

> Note: If you need to add additional expenses and the Adding Expenses screen is no longer visible, you can re-open it by clicking on the **Plus** sign at the top of the left half of the screen.

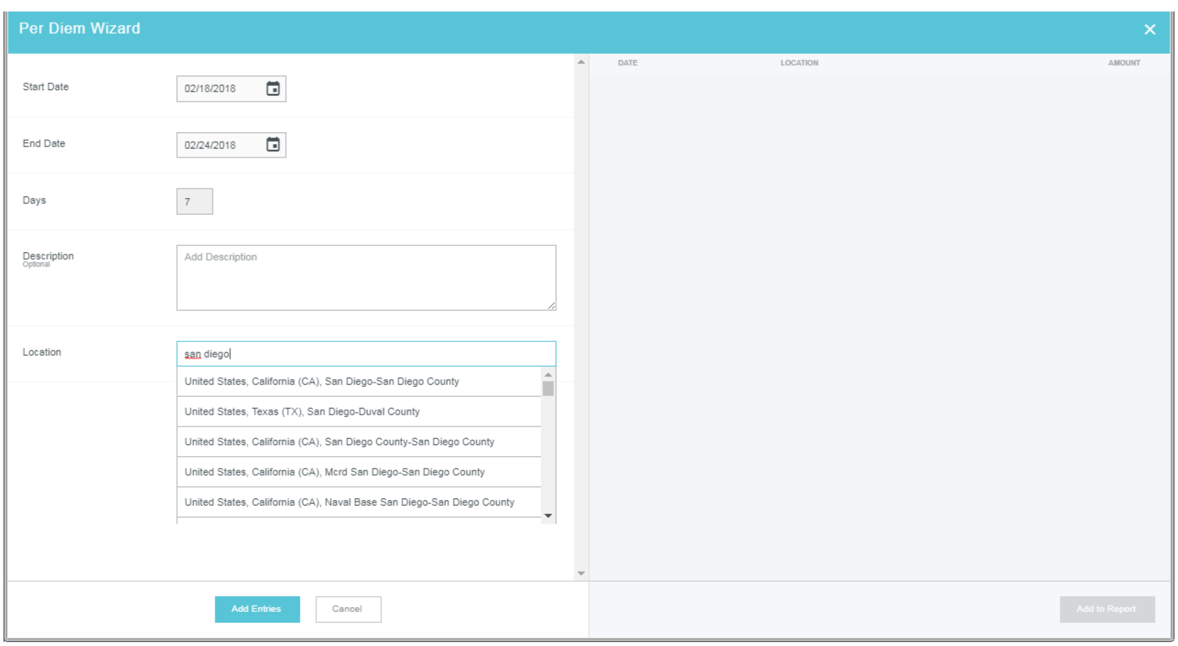


Choose the type of expense you want to add to your report and a new screen will open for you to enter details about the expense.

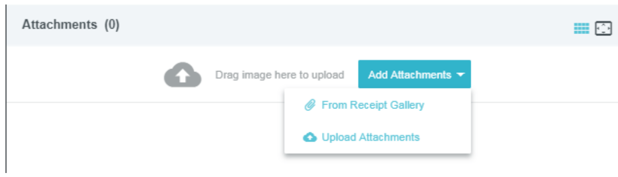
Example 1: Car Rental



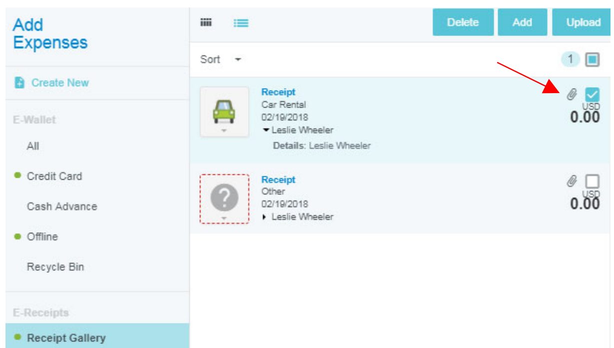
Example 2: Per Diem



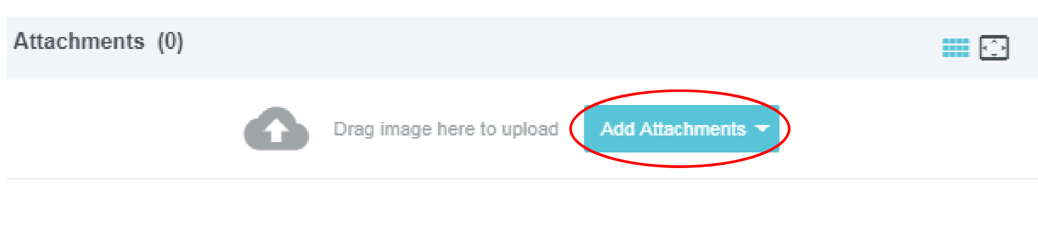
Most expenses will require the attachment of a receipt. Click the **Add Attachments** button on the individual expense. This will open a drop-down menu. From here you can either attach a receipt that you have already emailed into Chrome River via the Receipt Gallery or you can upload a new attachment from your computer. To add receipts to your Receipt Gallery via email, send them to receipt@chromefile.com



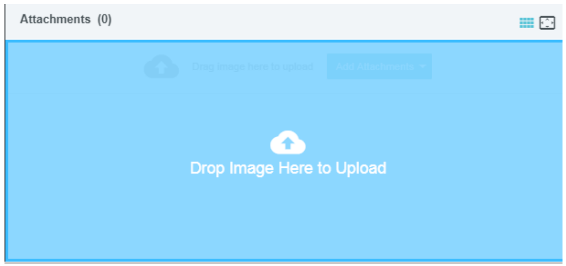
- From Receipt Gallery: This will open the Receipt Gallery. You can choose an individual receipt by clicking the box on the upper right of the individual receipt and hitting **Add**. The system will attempt to read the information on the receipt but you should always verify that the information for the expense is accurate and complete.



- Upload Attachments: This will open a new window to allow you to navigate to the electronic version of your receipt on your computer. Select the file and hit **Open**. The receipt will be attached to this expense and a small thumbnail version will be visible. To see more detail, simply click the thumbnail and the image will appear on the left side of your screen.
  - Drag & Drop: You can drag and drop the receipt file to Chrome River.

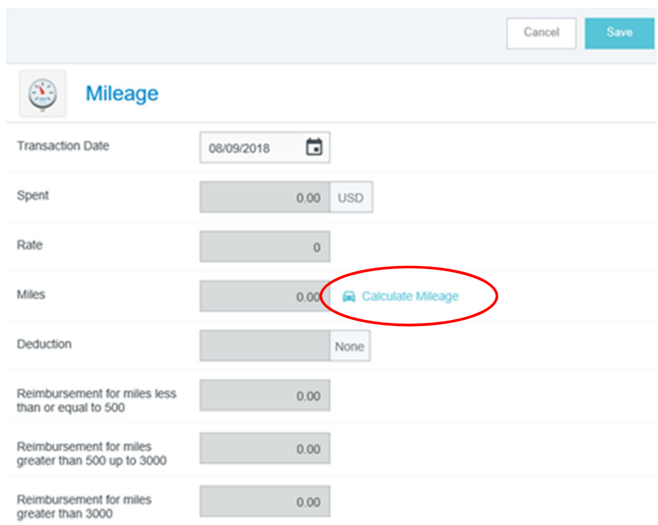


The screen will look like this when you are in the right place to 'drop' the file.

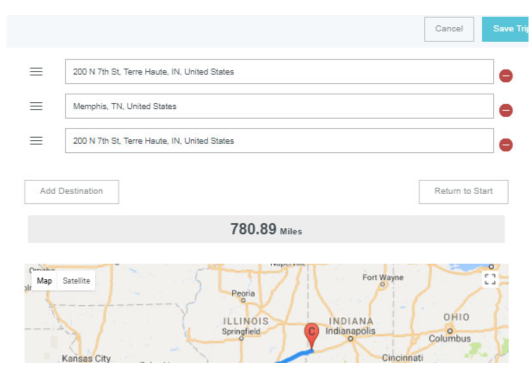


There are two types of expenses that do not require actual receipts. In both cases other information is required instead of a receipt.

- Mileage (Ground Transportation category): This type of expense requires you to use Google Maps to calculate the number of miles and attach that to the expense. To access Google Maps, click the **Calculate Mileage** button as indicated.



This opens a Google Map screen. Enter the starting point, the destination(s) and click Return to Start. Hit **Save Trip** to add this to your report. The system will calculate the number of miles and attach the map to the report.



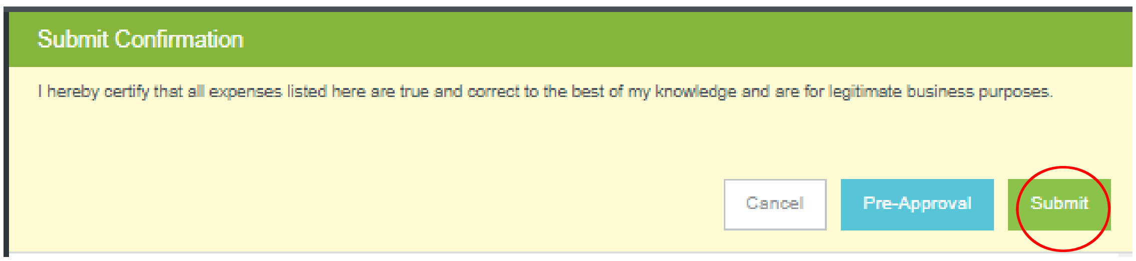
- Per-Diem meals: The US government sets the per-diem reimbursement rates for travel. This is based on the location of your overnight lodging. There is no receipt to attach for the actual per diem but you must enter the name and address of your lodgings in the Description field. Even if you stayed with friends or family or your room charge was paid by someone else (as in sharing a room), we must know the location of where you stayed to accurately calculate the per-diem rate.

When finished adding the expense, choose **SAVE** in the upper right corner or **Add Entries** in the lower left and then **Add to Report** on the lower right depending on the expense type.

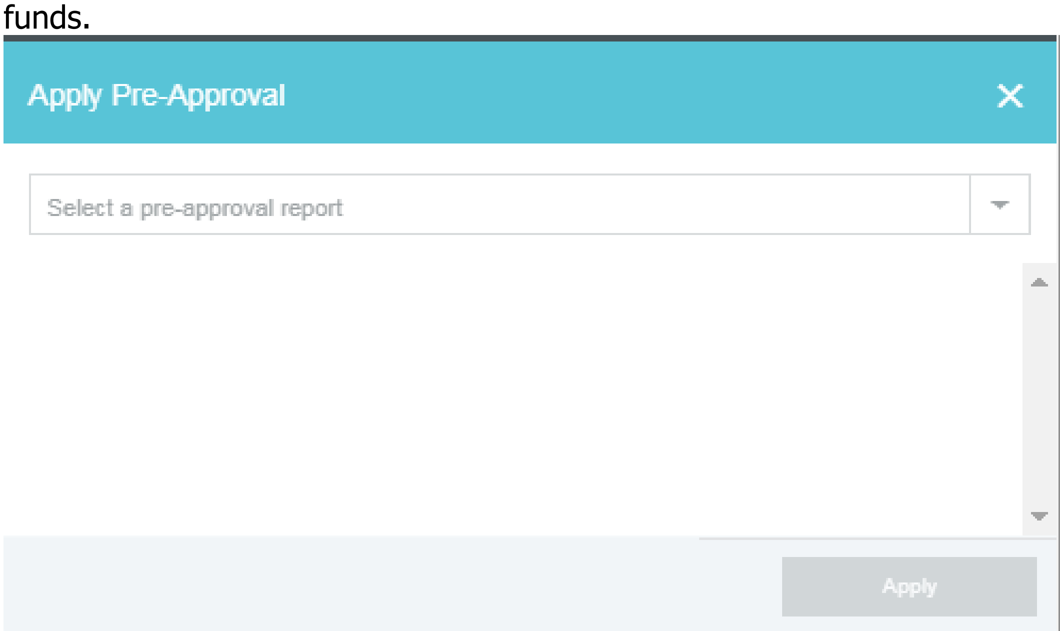
Submitting your Report for Approval

Once you have finished adding all of your expenses, submit the report for approval by choosing the green **Submit** button along the bottom of the screen.

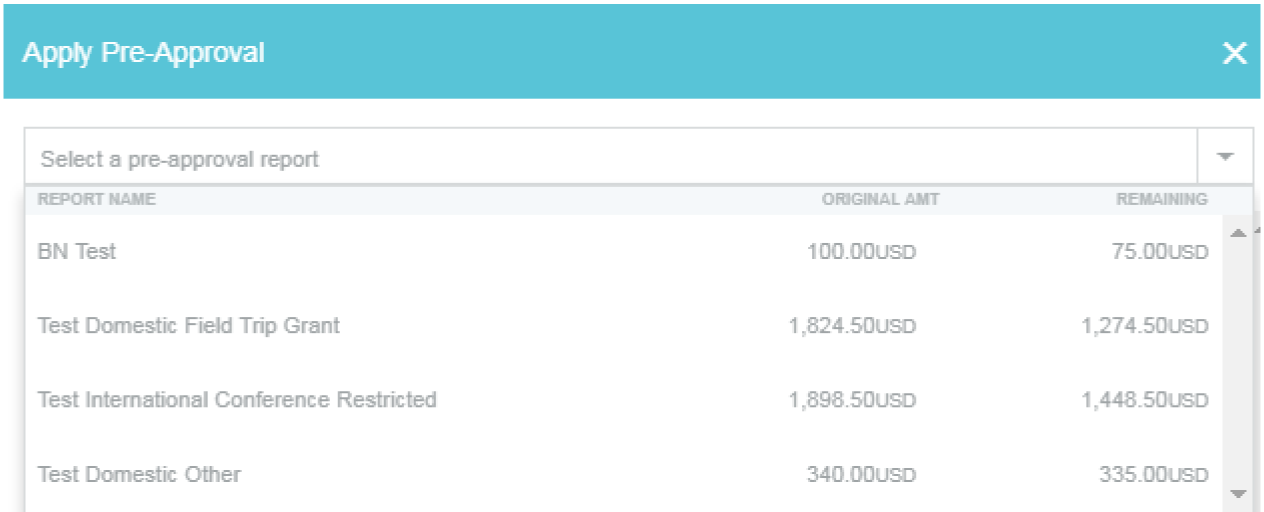
A prompt will pop up asking you to verify that all the information you entered is correct, attach a **Pre-Approval** and **Submit** your report. The system will not allow you to Submit your report until you have attached the Pre-Approval so you must do that first. To do this, select the Pre-Approval button.



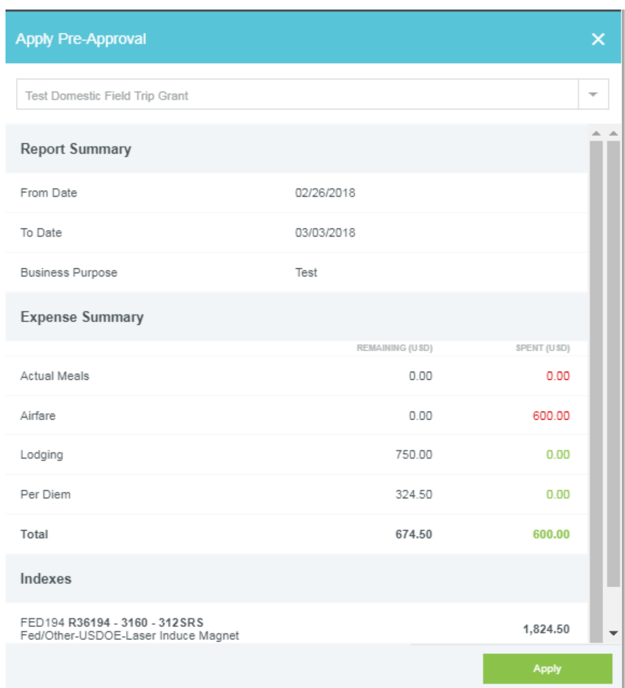
The system will bring up a new screen with a pull-down menu that will let you access a list all your approved Pre-Approval reports that still have available funds.



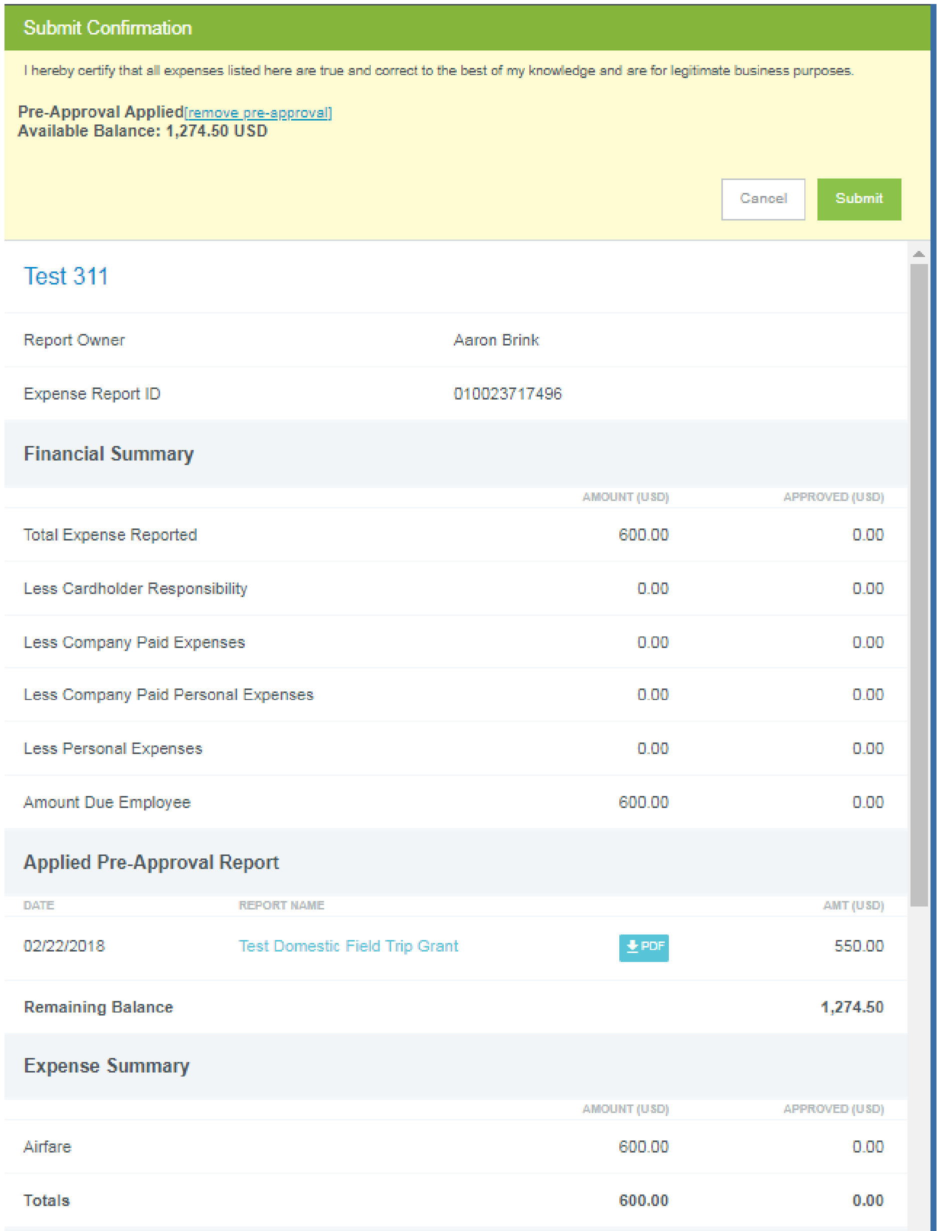
Click on the arrow as indicated to see a list of your Pre-Approvals.



Select the Pre-Approval report that applies to the trip in question. The right side of the screen will show details about the selected Pre-Approval report. Verify that you have selected the correct report and hit the **Apply** button. If you need to select a different Pre-Approval, simply click on the arrow again to see the full list of your available Pre-Approvals.



The screen will return to the Submit Confirmation screen. Verify all the summarized information is correct and click **Submit** again. The system will then automatically route your request for travel to the appropriate offices and personnel for the needed approvals.

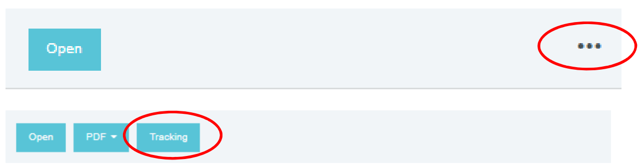


Tracking the Status of your Expense Report

To track your submitted Expense Reports, tap on the **SUBMITTED LAST 90 DAYS** in the Expenses Section of the Dashboard.

To access your submitted Expense Reports from anywhere else in the interface, tap the **MENU** button or the **ChromeRiver logo** and then tap **RECENTLY SUBMITTED** in the Expenses section of the drop-down menu.

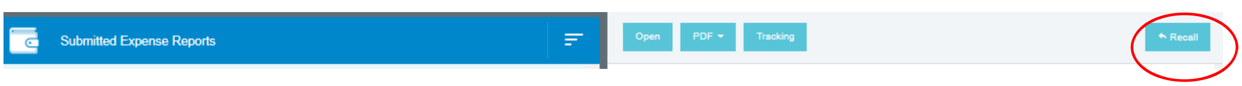
Find the Expense Report in the list and tap it to display the preview. Then tap the **three-dots** icon and select **Tracking** in the drop-down list. On wider screens, the **Tracking** button will appear instead of the three dots.



You may track the progress of an expense report on the Tracking screen, including who it has been assigned to and the status of each step. If multiple routing step numbers are displayed, you may tap each one to see all the details for that step. Tap the **X** in the upper right-hand corner to return to the preview for that expense report.

Recalling an Expense Report

If you discover that your report is inaccurate or incomplete, you may recall a submitted expense report as long as it has not been fully approved.



After hitting the **Recall** button a confirmation screen will appear. Tap **YES**. The expense report will appear in your Draft Expenses list but will retain any notes that may have been entered during the incomplete approval process.

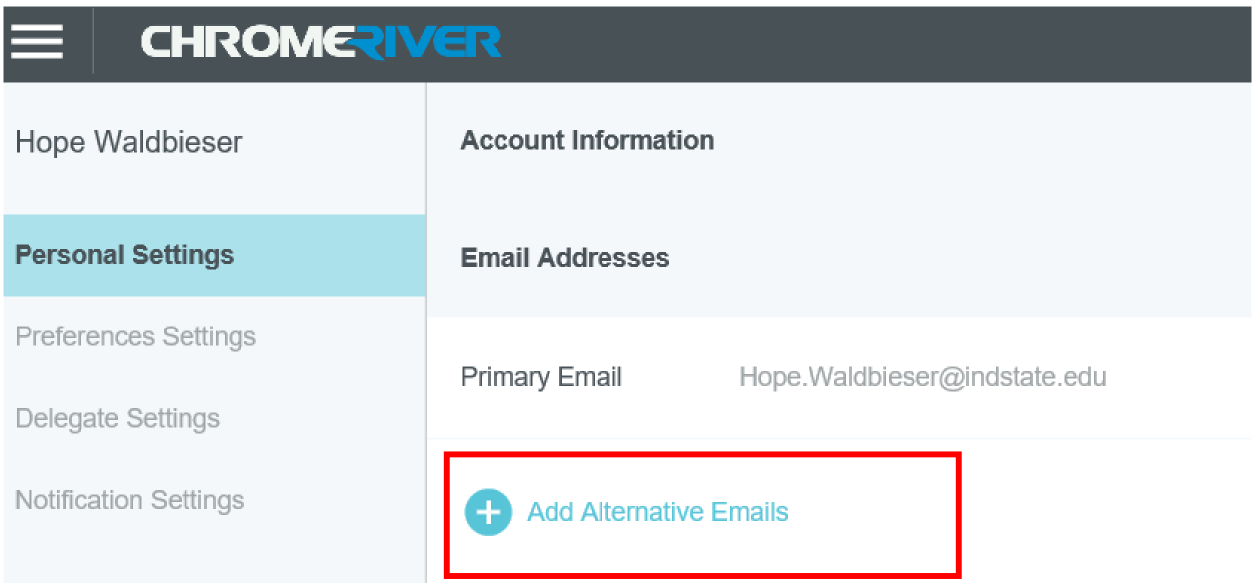
Returned Expense Report

When an approver has returned (denied) an expense report during the approval process, it will appear in the Returned Expenses list on the Dashboard. A returned Expense Report can be re-submitted for approval after the concerns that had been raised are addressed by correcting the report. Alternatively, it can be deleted if reimbursement is no longer being sought.

How to Submit Images and Receipts to Chrome River

There are multiple ways to attach receipts to your expenses in Chrome River. Receipts can be emailed or scanned and uploaded directly to the report header, to an expense, or to the Receipt Gallery. Only JPG, PDF, PNG, and TIFF files can be accepted, and no file may be greater than 5MB.

Receipts, images and emails must come from an address associated with your Chrome River account. Your ISU email will be your primary email address, to link additional email addresses that you might email your receipt from, tap your name in the upper right hand corner and then tap on settings. Tap on the +Add Alternate Emails.



For each alternate email that you add, a notification will be sent to your ISU email address and you will have 24 hours to verify the addition.

Email to Receipt Gallery

To email a receipt to your Receipt Gallery, simply attach the images to an email message, include the amount of the expense in the subject line, and email from an email address associated with your Chrome River account to receipt@chromefile.com

You can also take a photo with your mobile device and email directly from your phone as long as you've set up the email address in your Personal Settings in Chrome River. For best results, photos of receipts should be taken against a solid background and in clear focus.

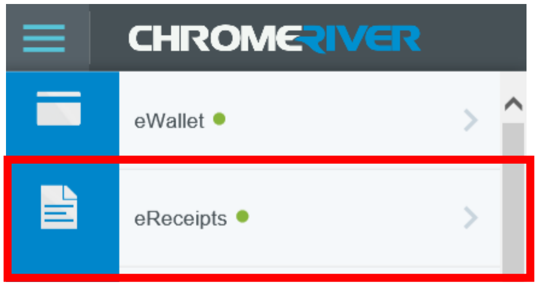
The receipts will appear in the user's Receipt Gallery.

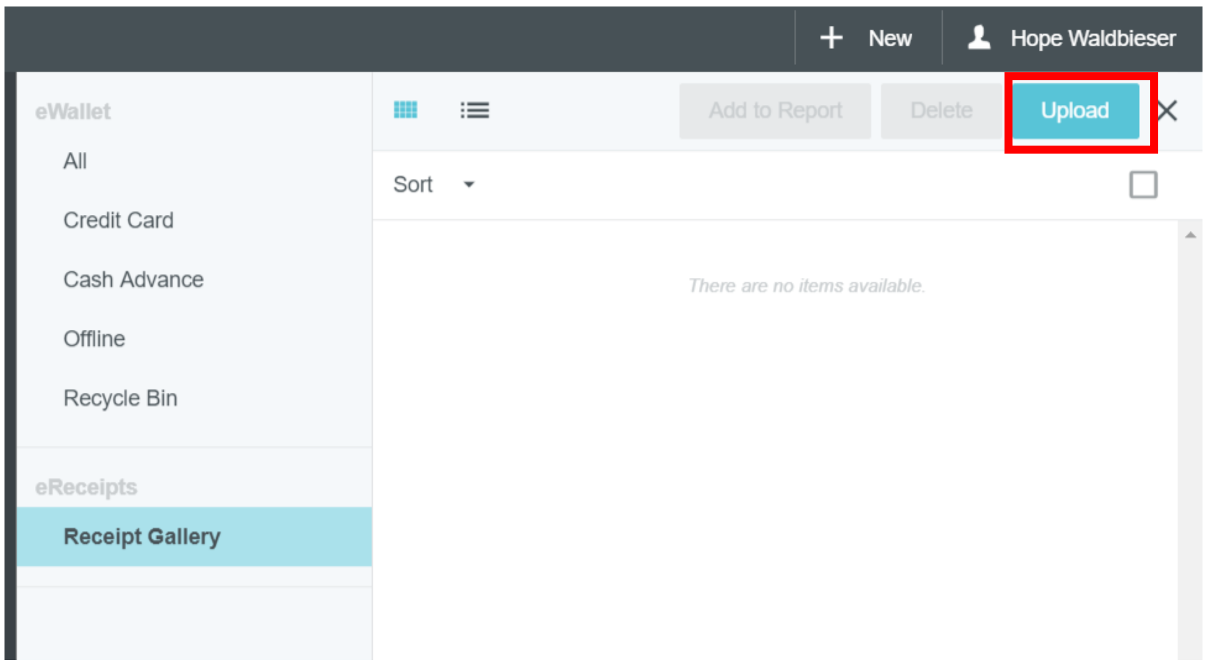
*For additional ways to enter images and receipts, see the **Help** documentation in Chrome River.*

Uploading Receipts within the Chrome River Application

Receipt Gallery

Access your eReceipts from the Chrome River menu (via the **eReceipts** button). In the Receipt Gallery, tap the Upload button and select a receipt image file to upload. Receipts previously sent in via email or updated via nightly credit card processing will already appear in the Receipt Gallery and/or eWallet.





How to Approve a Report in Chrome River

If you are required to approve an expense report either as the supervisor-approver, business manager, or as the traveler whose delegate submitted your report, you can complete the approval within the Chrome River application or via email. With an electronic system, we now reimburse expenses much faster and it is easy to forget that approving an expense item authorizes the charge to be paid through Banner. It is important that all Approvers take the time and intention to comprehensively review an expense item and its receipts before approving.

To Approve by Email

An email notification requesting approval will be sent to the approver's primary email. Open or view the body of the email to review the expenses listed on the report.

Report ID: 0100-2406-0907

ACTION REQUIRED Chrome River

Expense Report for	Brooklyn Brock
Report Name	Chem Test Expense
Submit Date	04/06/2018
Expense Dates	05/01/2018 - 05/05/2018
Total Expenses	145.75 USD
Prior Approvers	Teresa Sale [04/06/2018 GMT]

Account Summary			Amount (USD)
CHEM	A10020 - 3130 - 011CHM	CHEMISTRY	145.75

Pre-Approval Summary	Estimated (USD)	Submitted
Airfare	550.00	0.00
CarRental	90.00	0.00
Lodging	1,000.00	0.00
PerDiem	155.50	145.75
Totals	1,795.50	145.75

Expense Details

05/01/2018	Per Diem CHEM	CHEMISTRY A10020 - 3130 - 011CHM	44.25 USD
Description	Holiday Inn Express 123 Main Street Phoenix, AZ		
Cost Code	70550		
05/02/2018	Per Diem CHEM	CHEMISTRY A10020 - 3130 - 011CHM	5.00 USD
Description	Holiday Inn Express 123 Main Street Phoenix, AZ		
Cost Code	70550		
05/03/2018	Per Diem CHEM	CHEMISTRY A10020 - 3130 - 011CHM	31.00 USD
Description	Holiday Inn Express 123 Main Street Phoenix, AZ		
Cost Code	70550		
05/04/2018	Per Diem CHEM	CHEMISTRY A10020 - 3130 - 011CHM	31.00 USD
Description	Holiday Inn Express 123 Main Street Phoenix, AZ		
Cost Code	70550		
05/05/2018	Per Diem CHEM	CHEMISTRY A10020 - 3130 - 011CHM	34.50 USD
Description	Holiday Inn Express 123 Main Street Phoenix, AZ		
Cost Code	70550		

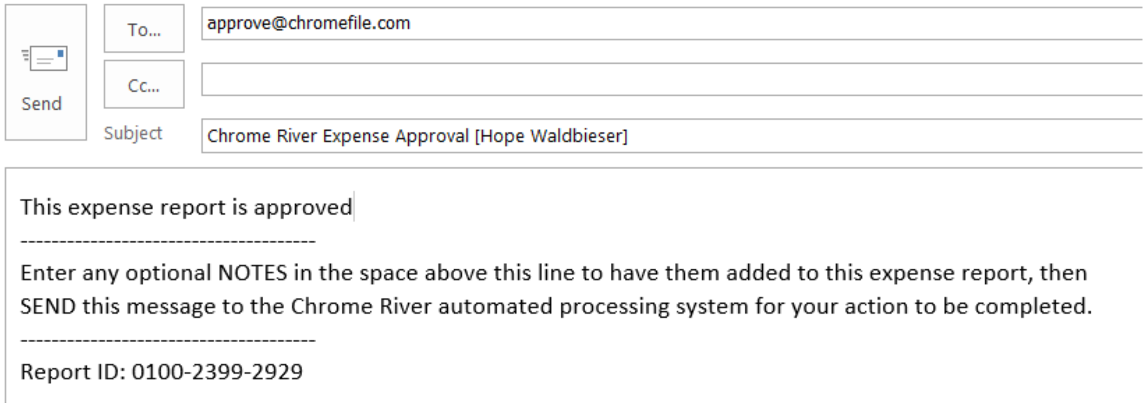
Financial Summary	Amount (USD)
Total Expense Report	145.75
Less Company Paid	0.00
Amount Due Employee	145.75

ACCEPT RETURN

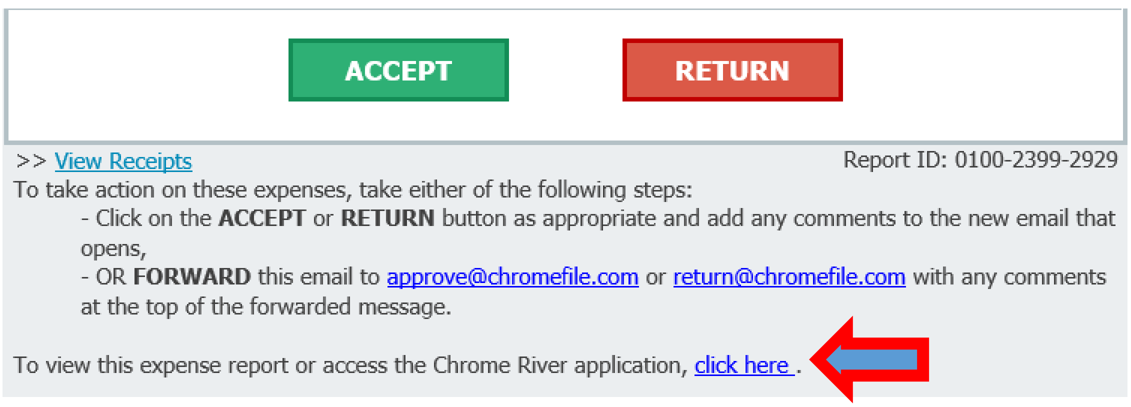
To take action on these expenses, take either of the following steps:
- Click on the **ACCEPT** or **RETURN** button as appropriate and add any comments to the new email that opens,
- OR **FORWARD** this email to approve@chromefile.com or return@chromefile.com with any comments at the top of the forwarded message.

To view this expense report or access the Chrome River application, click here .

The report can be accepted (approved) or returned by tapping the green Accept or red Return button at the bottom of the email. A new message will open and the approver can add comments before sending the approval/return.

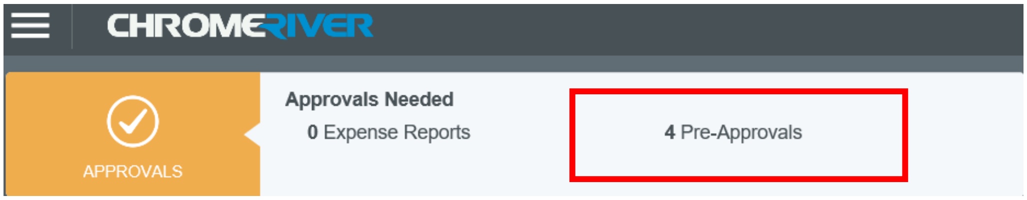


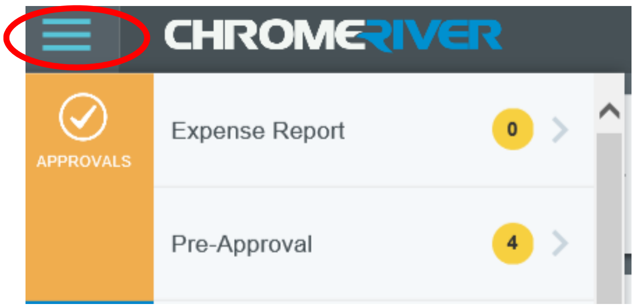
If the approver wishes to access the report in the Chrome River application to view more detail or make adjustments, the report can be opened by clicking the link at the bottom of the email message. The approver will then follow procedures for approving, adjusting, or returning the report within the Chrome River application.



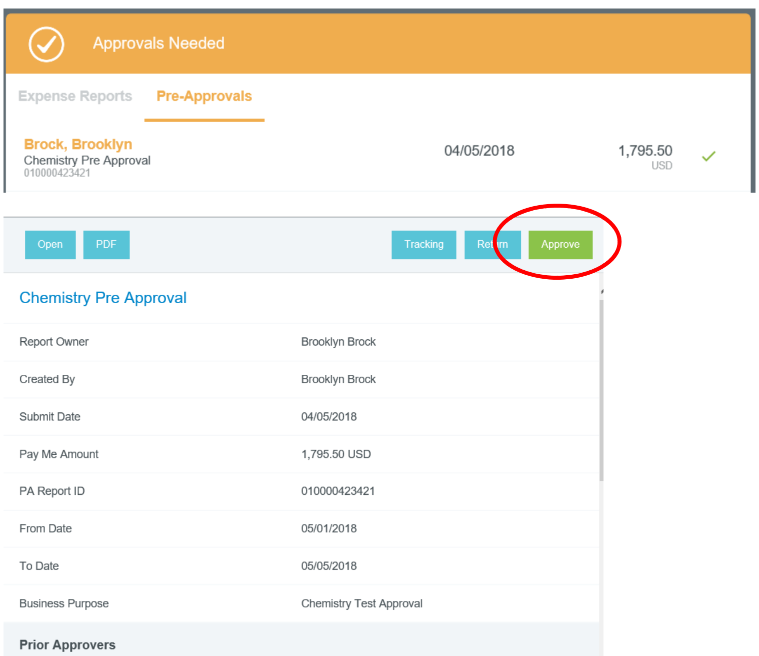
To Approve in the Chrome River Application

Find the report to be approved by tapping on the appropriate report type on the orange Approvals ribbon *or* using the drop down menu.





From the Approvals pane, click on the report you want to approve. This will bring up the report preview pane. If all items are satisfactory, the report can be approved from the preview pane by tapping the Approve button.



If you need to review or adjust details of specific line items, tap the Open button to access the expense report detail. If no changes are made, tap the back arrow to return to the report preview pane and approve or return the report.

If you need to **edit** or **return** a pre-approval you can access the instructions in the detailed user guide available in the Chrome River Help Center. You can access the Help Center by tapping on your name in the upper right corner and selecting Help.