Chrome River – Quick Reference Guide

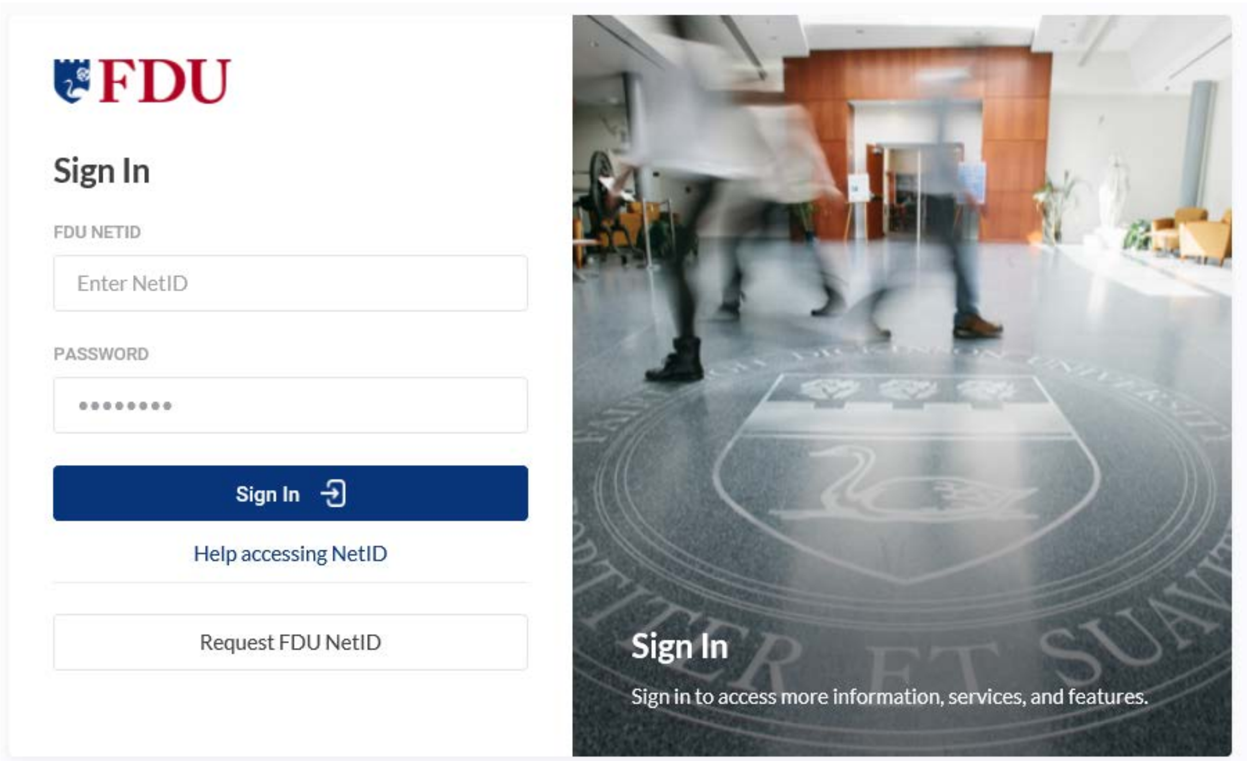
To get started, use one of the following links:

expensereport.fdu.edu

https://app.ca1.chromeriver.com/login/sso/saml?CompanyID=fdu.edu

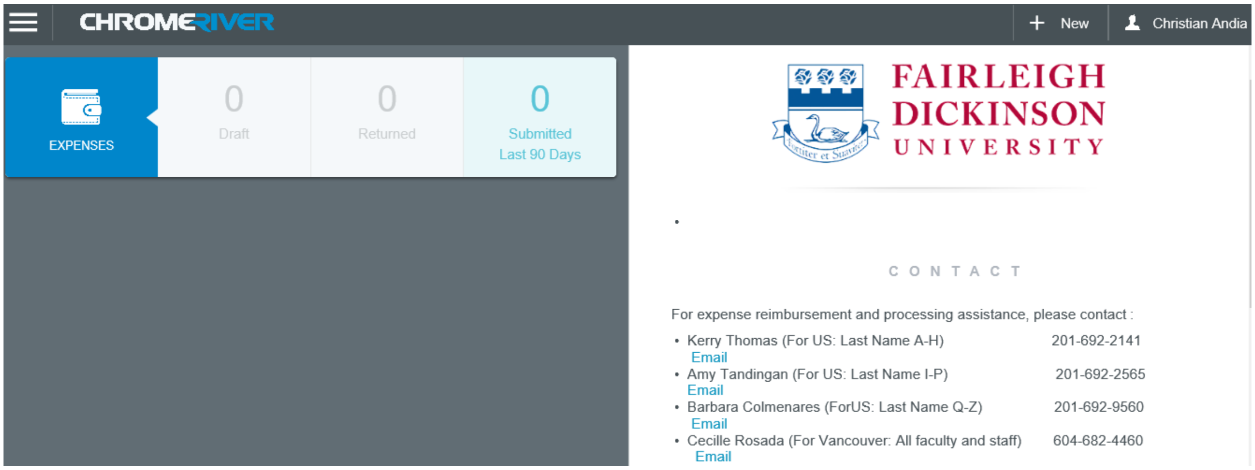
You should always see the FDU log in page to log into Chrome River. These addresses will work on your mobile and tablet as well.

Log In Screen



Enter your complete FDU email address and password. Once logged in you will see the home page.

Home Page



On the home page you will see 2 panels (left and right side). The right panel is FDU's page with contacts and notices. The left panels are quick guides to what is available. For expenses you will see drafts, returned and submitted reports. For approvals you would see reports you have to review. Two panels are available on your computer. Only one panel is visible when on your mobile or tablet.

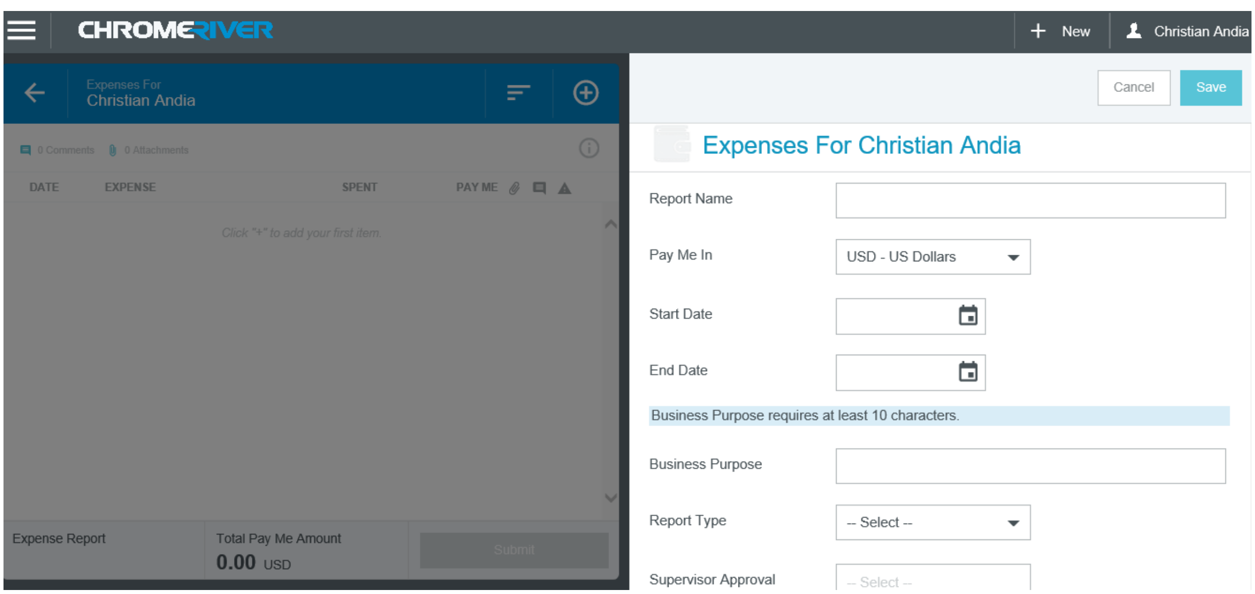
The 3 lines in the top left corner is your **Menu**.

The **ChromeRiver** logo will always take you back to the home page.

In the upper right hand corner is your name. If you click on that you will see **SETTINGS**, **HELP** center, and **LOGOUT** options.

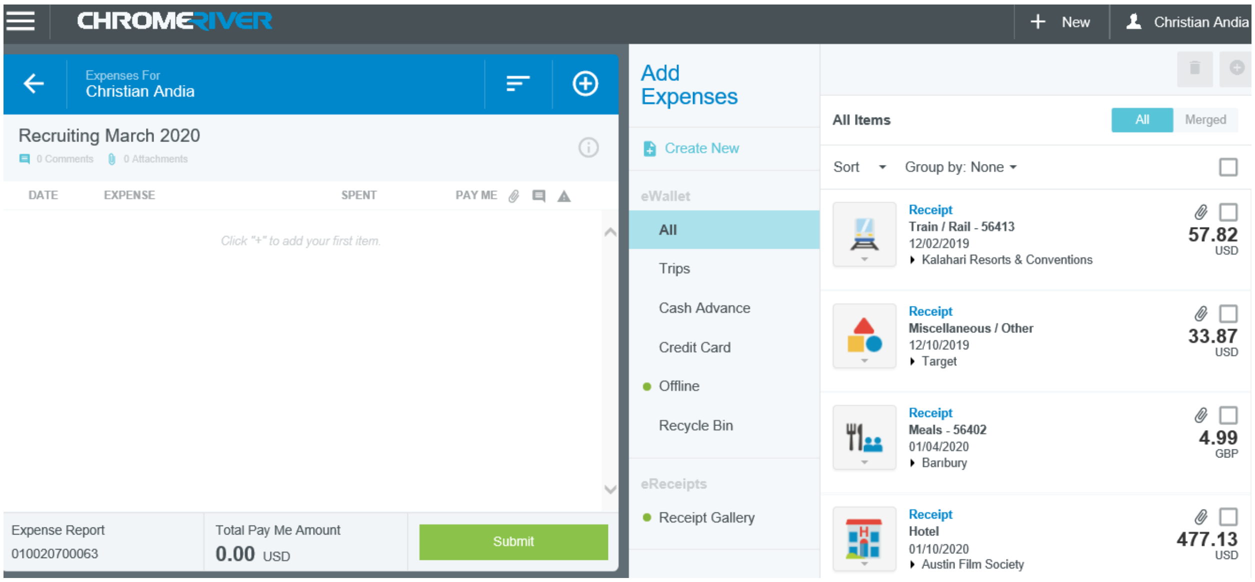
"**+ NEW**" is what you click to start a new expense report or travel advance.

New Expense and Travel Advance Reports



This is the first page that must be filled out to begin the report, the cover page. The report name is very important for yourself and reviewers to keep track and differentiate from your other reports. “Report Type” is where you choose **Expense Report** or **Travel Advance Report**. The blue **SAVE** button up top allows you to save and continue.

Adding Expenses



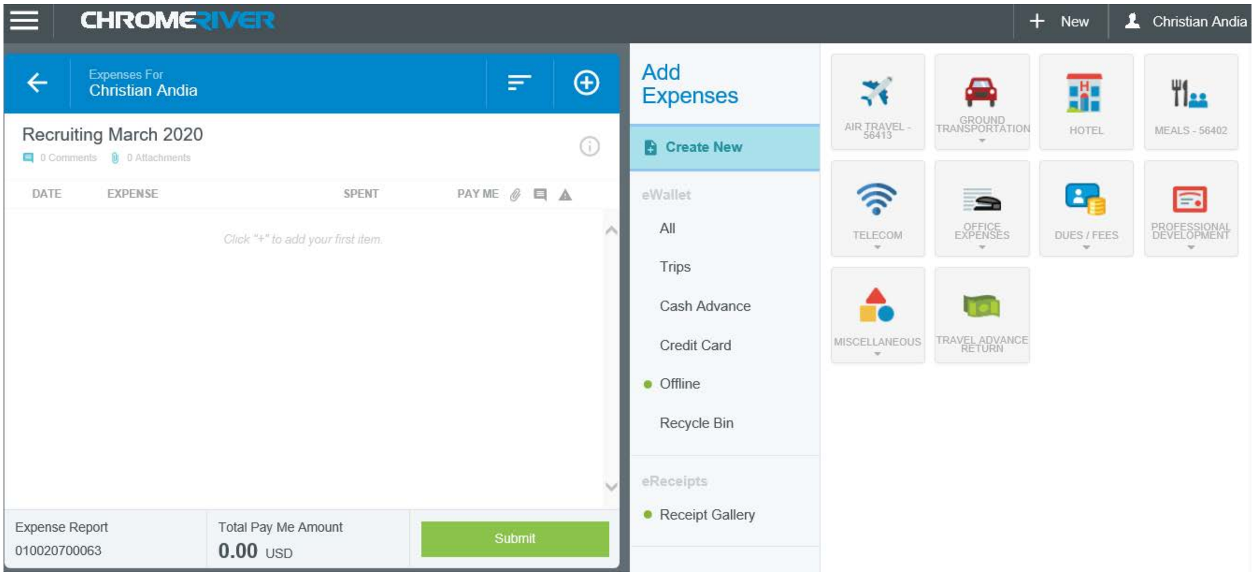
The add expenses panel will appear to your right. Here you see your **eWallet** and **eReceipt Gallery**.

If you select one or more of the receipts loaded and add to your report make sure the preloaded information is correct.

In this screen shot, you will see the first item is $57.82 for train/rail. That is incorrect. You must go over the tile and pick the correct tile/expense. Once you add the expense, you must complete all the fields. Here you must also make sure the amounts and dates are correct, if not you may edit.

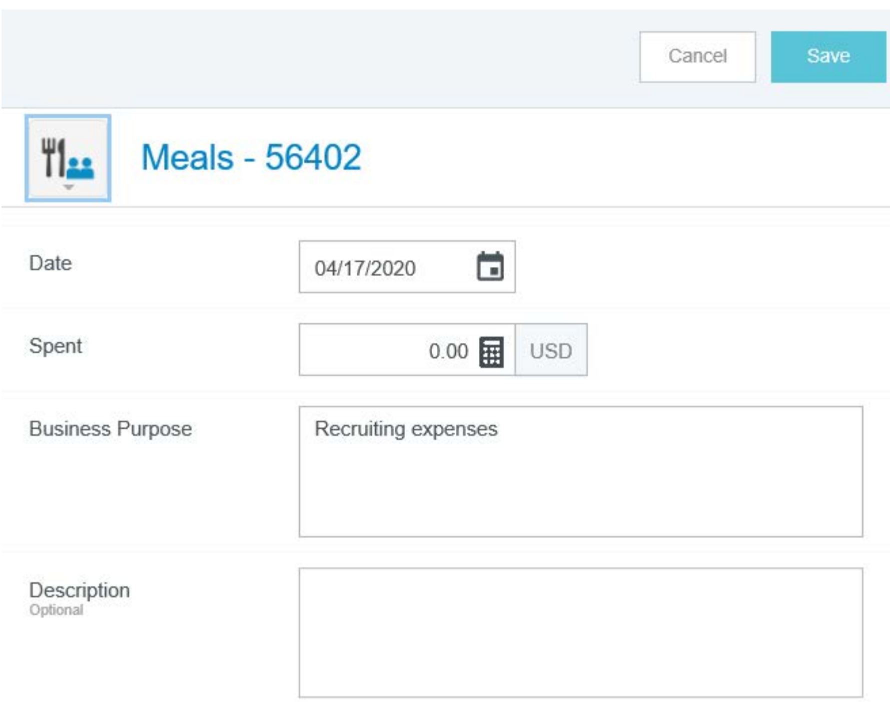
To create a new expense either you may select one the receipts you already have loaded, as mentioned above, or you may select “Create New”.

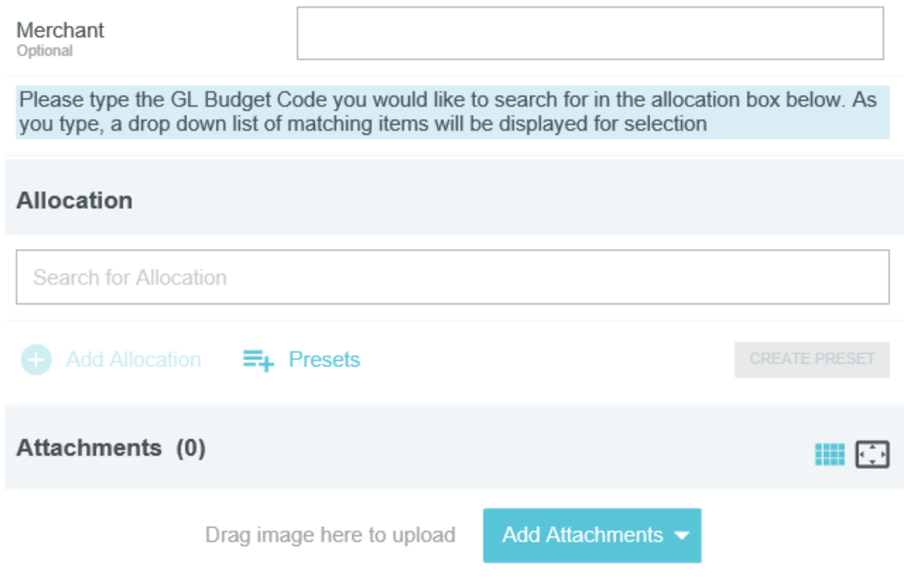
Create New Expense



When selecting "**Create New**" all the tiles appear. Some tiles are linked to expenses; other tiles have subcategories. In these subcategories, all but one tile are also linked to expenses.

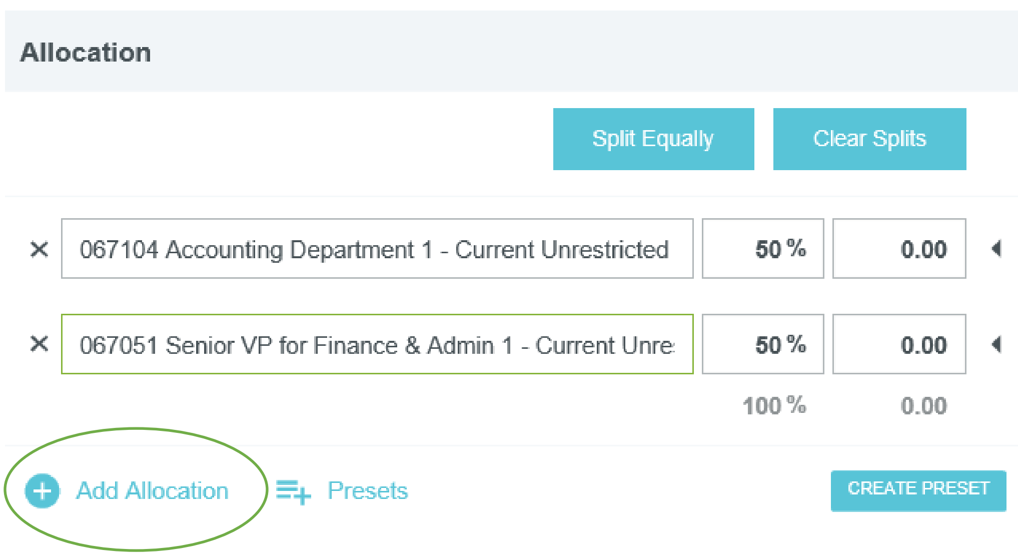
For example – Meals





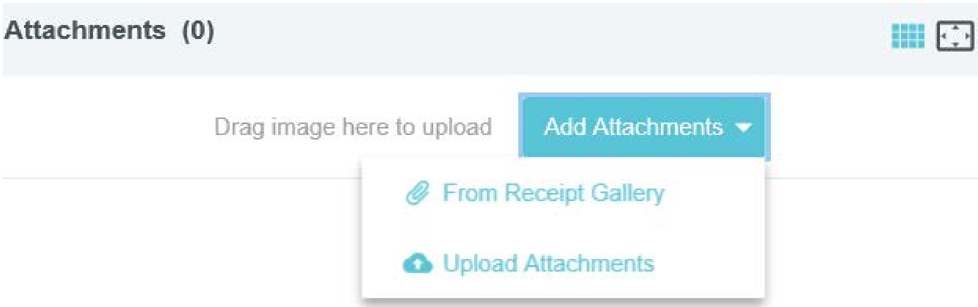
Enter all the necessary information. As per FDU policy, you must include all attendees, if applicable.

Allocation – Here is where you enter or search for the department/budget. You may add an allocation if needed. See below.



You may edit how you would like to split by entering the percentages or entering the amounts.

Add Attachments



To add attachments or receipts, you may select from your **Receipt Gallery** or **Upload Attachments**.

To upload attachments you must have the receipts already saved in your computer to be able to select and upload. From your mobile or tablet you must give permission to access your pictures and/or documents to select and upload (using the website and/or application).

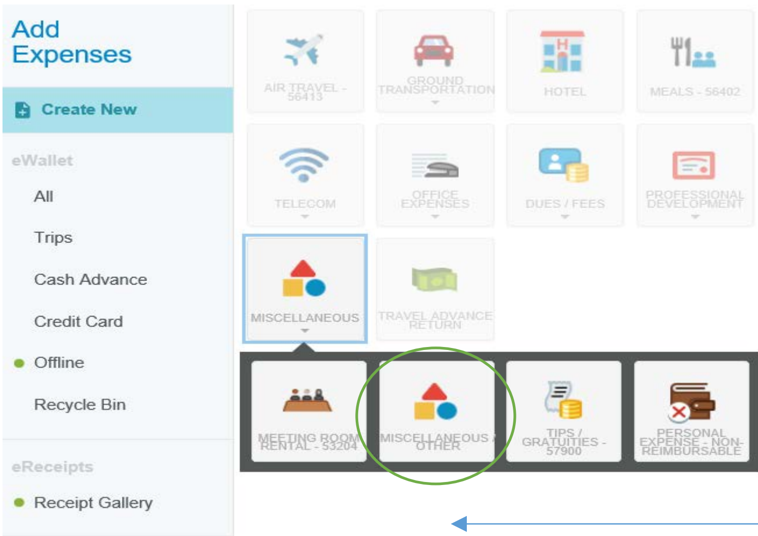
How To Load Attachments To Your Account

To email yourself attachments you may email receipt@ca1.chromeriver.com (from a linked account in Chrome River). Just add the attachments in the email. Once sent, they will appear in your eWallet.

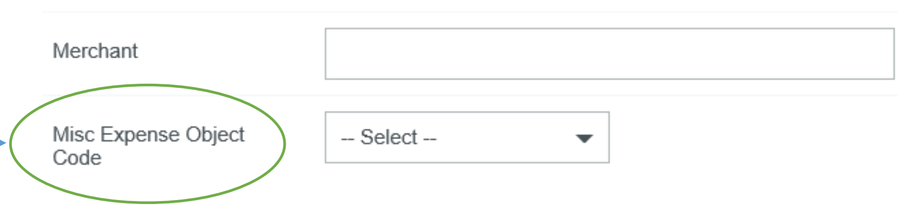
You may also use the Chrome River application. From your tablet or mobile, go to the app store, search and download “Chrome River”. Once logged in you may take pictures of your receipts using the application and load instantly; or you may give access and upload from your mobile or tablet. The Chrome River app gives you full function, allowing you to do everything you would on their site. Chrome River SNAP is another available app, which only allows you to manage your receipts and images. SNAP does not have any other functions.

Miscellaneous Other

If you do not see the expense you are looking for, click on Miscellaneous/ Miscellaneous Other.



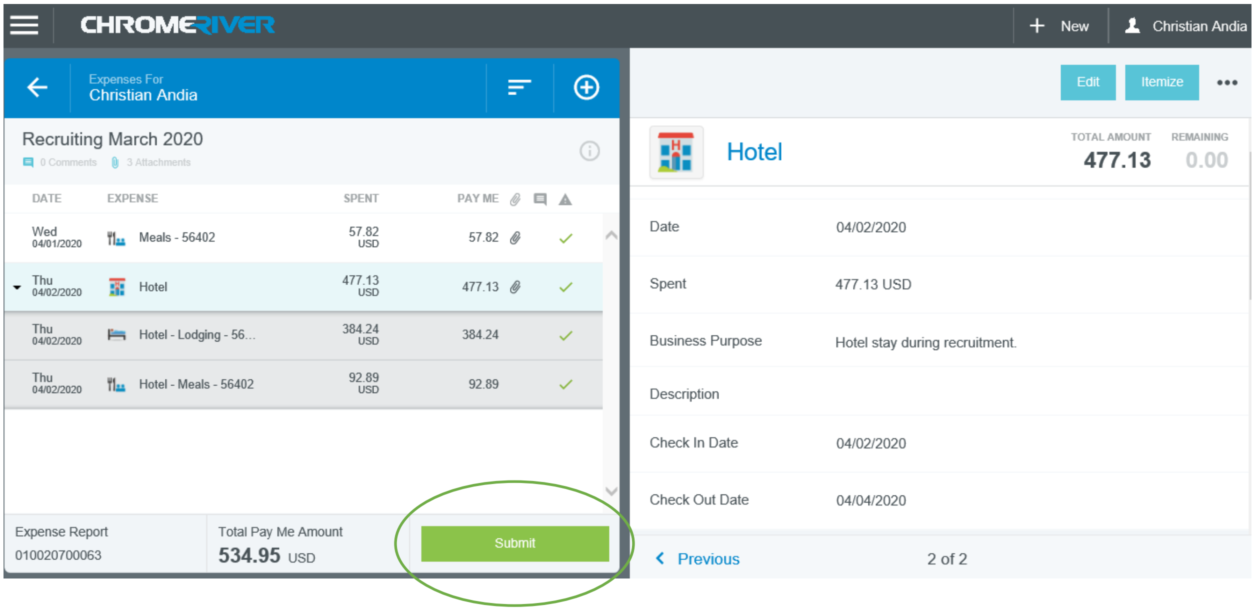
Once you click on **Miscellaneous Other**, you would have to fill in all the other information as you would any other expense. What makes this tile different is the “Misc Expense Object Code”.



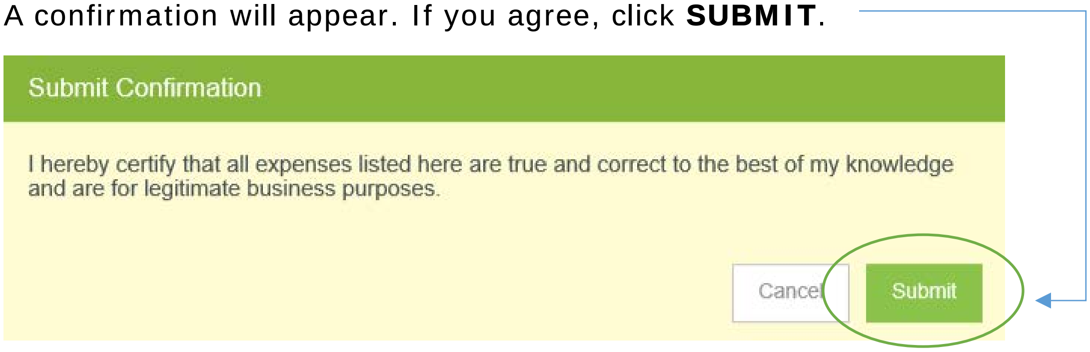
The **“Misc Expense Object”** is the field where you select the object code (expense). Here is where all the available expenses are located that are not linked to tiles.

Submitting Report

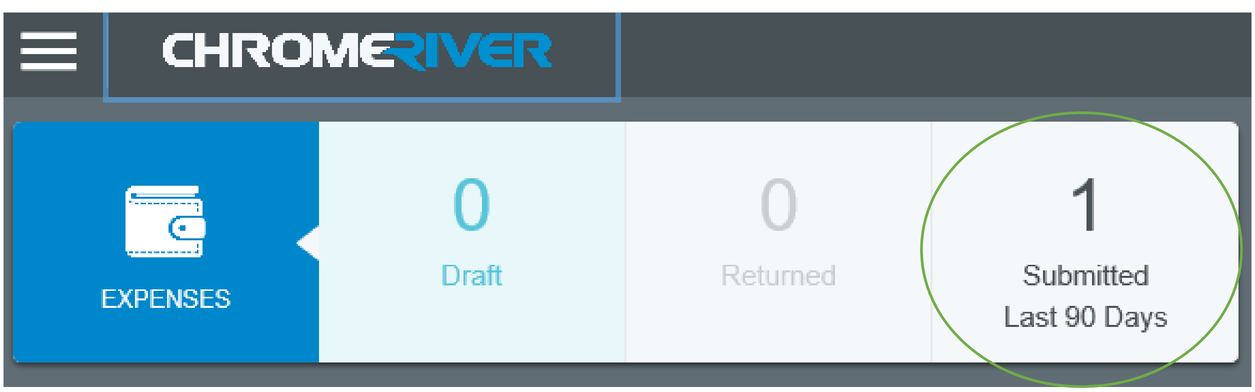
Once you have entered all your expenses. You may submit. Click **SUBMIT**.



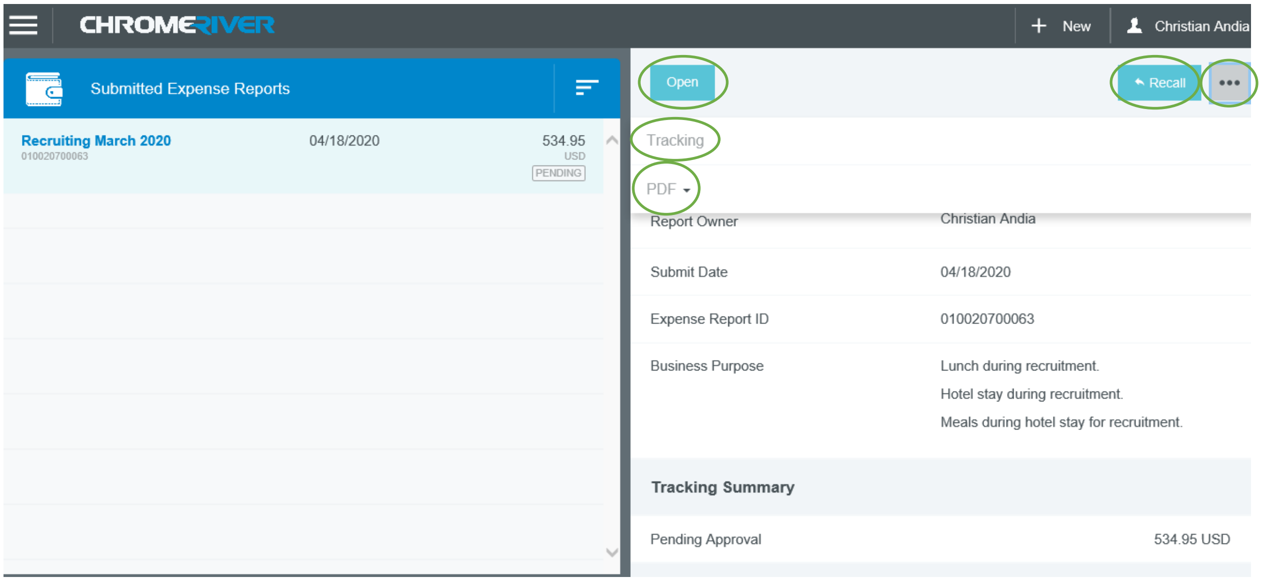
A confirmation will appear. If you agree, click **SUBMIT**.



Once your report is submitted, you may view, recall, print, or track it.



To view your submitted reports, just click on "**Submitted**". A list of all your reports will show up. Click on one. Once you click, the cover page will show up.

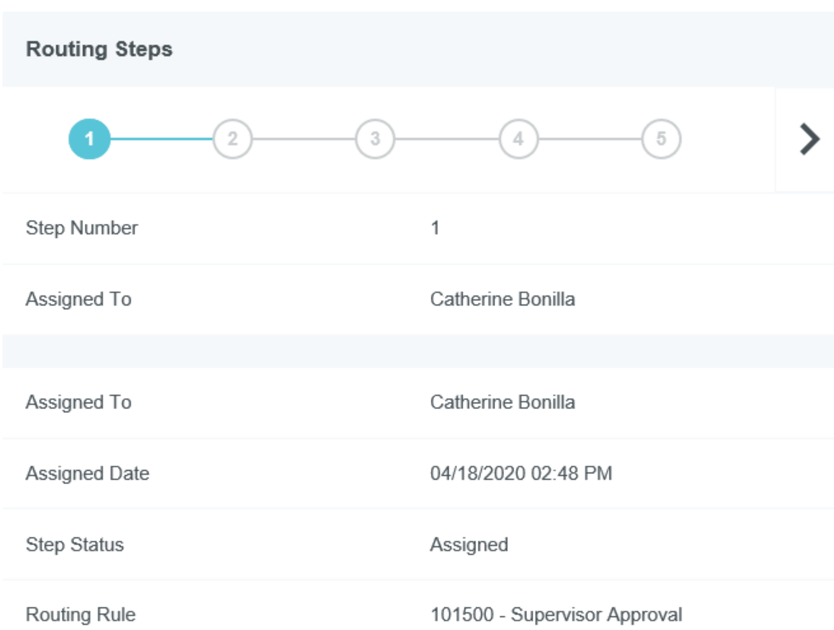


Here you see all the options you have after submitting. You may **Open** or **Recall**. If you click on the 3 dots, you may **Track** or view as **PDF**. There are many views for PDF. The good thing about these PDF files is you may save any of them offline. You may also print a copy if you would like.

Recall – If you would like to change or edit anything in your report, you may recall it before it is approved.

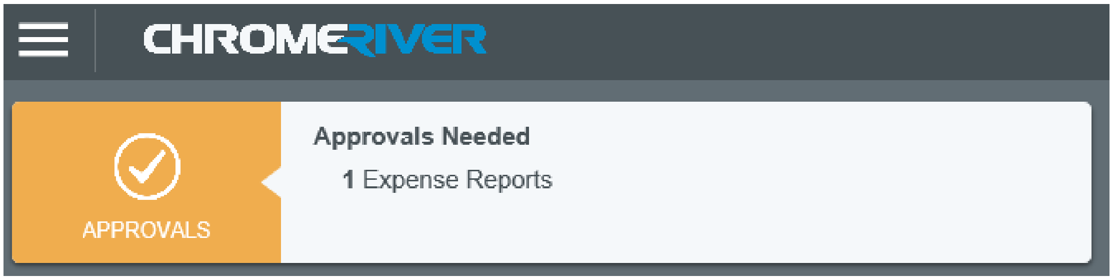
Tracking

If you click on **TRACKING**, click on an expense, you will the status of your expenses.

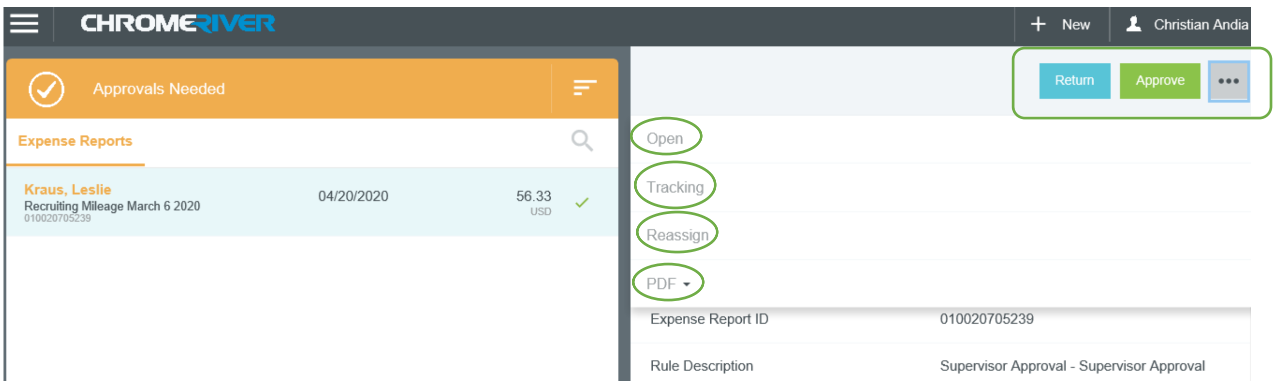


Here you may track your expenses. By clicking on each step, you will see the step number change, as well as the detail below. It is a quick and easy way to keep track of where it would go, and where it currently is.

<u>Approvals</u>



Approvals would appear on the home page. To view the reports, just click on the number or type of report.



A list of all your reports will show up. Click on one. Once you click, the cover page will show up. You may **RETURN, APPROVE**, or click the 3 dots for more **OPTIONS**. Additional **OPTIONS** include **OPEN, TRACKING, REASSIGN**, and **PDF**.

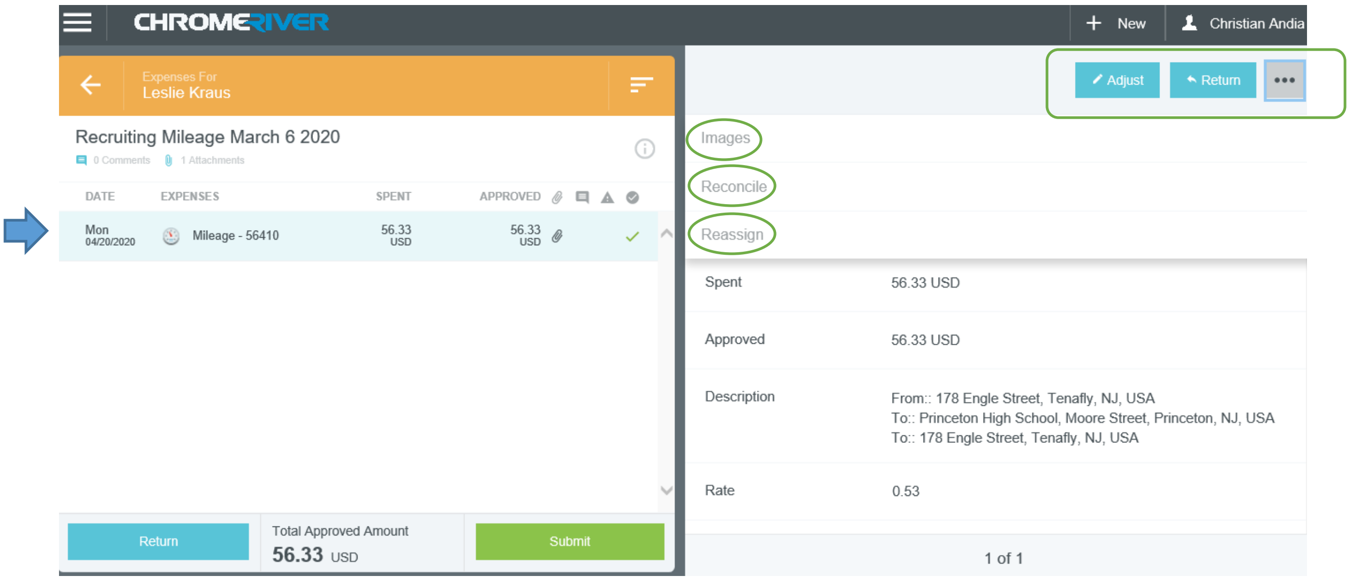
Return- This will return the whole report to the owner.

Reassign- The whole report could be reassigned for someone else to review.

Tracking- Works the same as when you track a submitted report. Please refer to the "**TRACKING**" section above.

PDF- There are different PDF options. You may view, save offline, and print.

Once you **OPEN**, the expenses will be listed out one by one. If you click on the expense, you may further review. You will also see more **OPTIONS**.



You may **ADJUST, RETURN**, or click on the 3 dots for more **OPTIONS**. These **OPTIONS** include **IMAGES, RECONCILE**, and **REASSIGN**.

Adjust- You may adjust the allocation (account number), or reduce the approved amount if necessary. If anything else needs to be changed you must send it back to the expense owner.

Return- To send expense back to the owner.

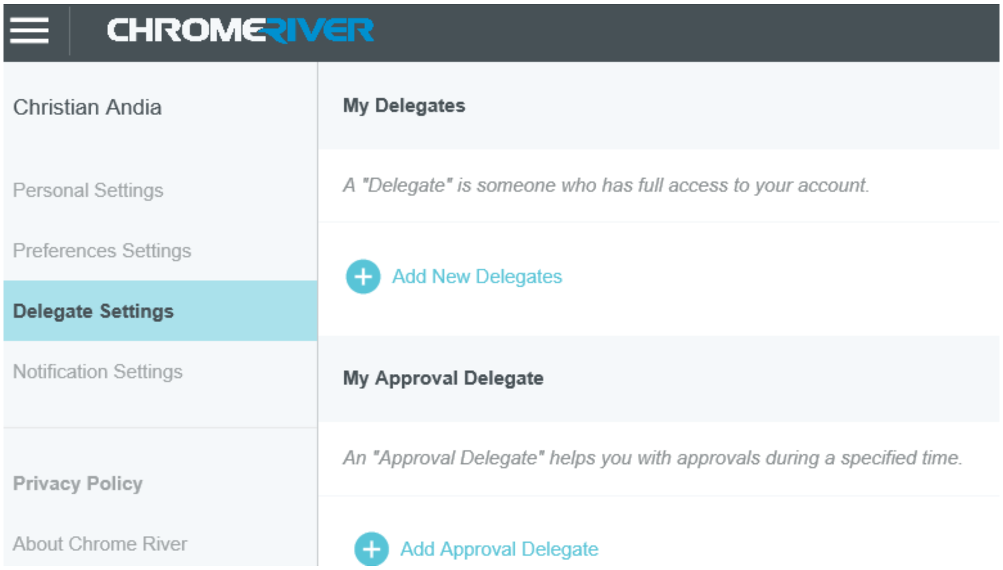
Images- You may view all receipts and support attached to the expense.

Reconcile- This serves more as a checklist if you have several expense items to review. Once reviewed you may reconcile and a darker check and full circle will appear to the right of the expense line. If you change your mind you may unreconcile.

Reassign- To reassign the expense for someone else to review.

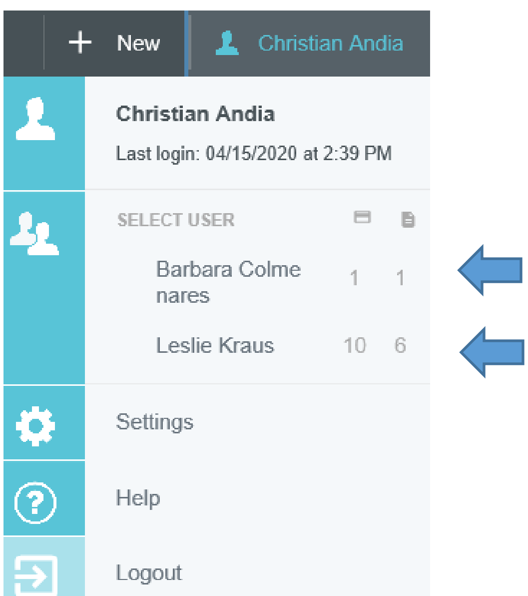
Delegates

In settings, you may choose **DELEGATES** and/or an **APPROVAL DELEGATE**



A **DELEGATE** is someone who has full access to your account. This person may create expense reports for you.

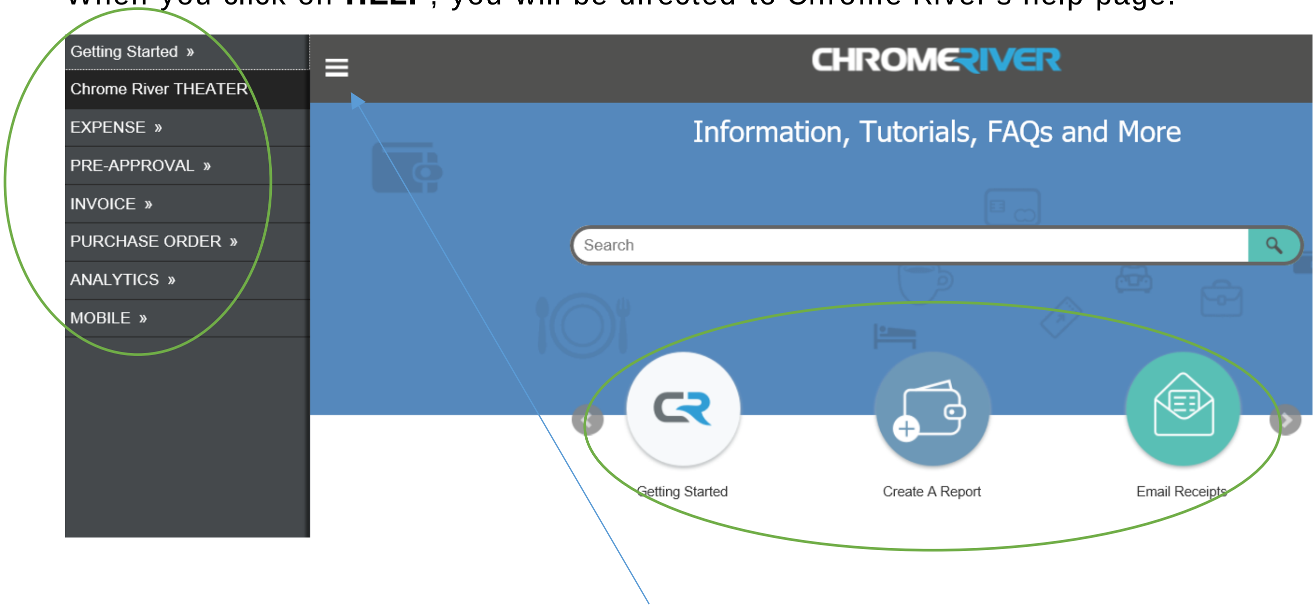
An **APPROVAL DELEGATE** may help you with approvals during a specific time. You choose the person and time frame.



Here is how the delegators would appear on the delegate's account.

Help Center

When you click on **HELP**, you will be directed to Chrome River's help page.



In the top left corner, if you click on the 3 lines, you will see the Menu. In this Menu, you will see many topics. Click on one and everything to do with that topic will show up. All these options, along with the ones in the middle of the page, provide very good information. In some, they provide videos and tutorials that are very detailed and helpful.

Please refer to this **HELP** page if you have any questions or concerns.