

Chrome River – Quick Reference Guide

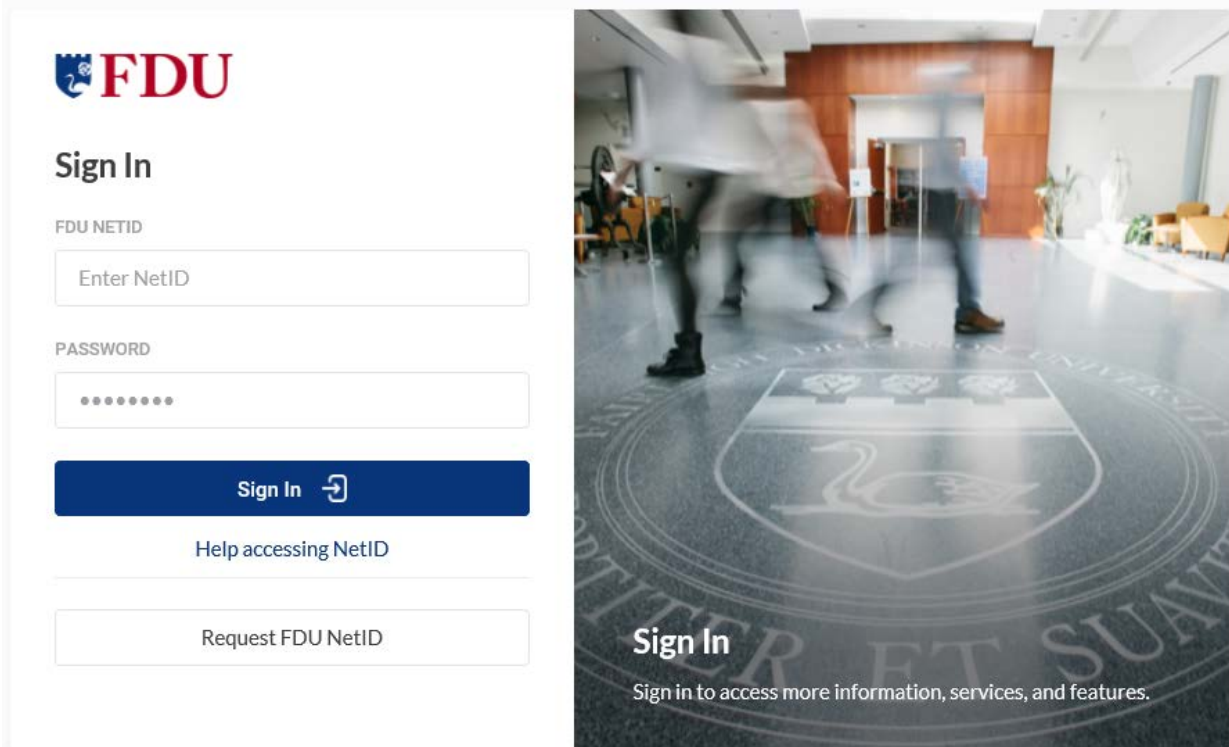
To get started, use one of the following links:

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



The image shows two side-by-side panels. The left panel is a screenshot of the FDU Sign In web page. It features the FDU logo at the top left, followed by the text "Sign In". Below this are two input fields: "FDU NETID" with a placeholder "Enter NetID" and "PASSWORD" with a masked field of seven dots. A blue "Sign In" button with a right-pointing arrow is positioned below the fields. Underneath the button is a link "Help accessing NetID". At the bottom of the form is a "Request FDU NetID" button. The right panel is a blurred photograph of a university hallway. In the foreground, the FDU logo is printed on the floor. The text "Sign In" is overlaid on the bottom left of the photo, with the subtext "Sign in to access more information, services, and features." below it.

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

Home Page

The screenshot shows the ChromeRiver Home Page. At the top, there is a navigation bar with the ChromeRiver logo on the left, a '+ New' button in the center, and the user name 'Christian Andia' on the right. Below the navigation bar, the left sidebar is divided into three panels: 'EXPENSES' (highlighted in blue), 'Draft' (0), 'Returned' (0), and 'Submitted Last 90 Days' (0). The main content area on the right features the Fairleigh Dickinson University logo and a 'CONTACT' section. The contact information is as follows:

CONTACT

For expense reimbursement and processing assistance, please contact :

- Kerry Thomas (For US: Last Name A-H) 201-692-2141
[Email](#)
- Amy Tandingan (For US: Last Name I-P) 201-692-2565
[Email](#)
- Barbara Colmenares (ForUS: Last Name Q-Z) 201-692-9560
[Email](#)
- Cecille Rosada (For Vancouver: All faculty and staff) 604-682-4460
[Email](#)

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

The screenshot shows the ChromeRiver 'New Expense and Travel Advance Reports' form. The form is titled 'Expenses For Christian Andia' and includes the following fields:

- Report Name:
- Pay Me In:
- Start Date:
- End Date:
- Business Purpose: (Business Purpose requires at least 10 characters.)
- Report Type:
- Supervisor Approval:

At the bottom left, there is a 'Submit' button. The total pay me amount is shown as 0.00 USD.

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 screenshot shows the 'Add Expenses' interface in the CHROME RIVER app. The top navigation bar includes the company logo, a '+ New' button, and the user's name 'Christian Andia'. The left sidebar displays the report title 'Recruiting March 2020' and a table with columns 'DATE', 'EXPENSE', 'SPENT', and 'PAY ME'. Below the table is a 'Submit' button and a 'Total Pay Me Amount' of '0.00 USD'. The main content area is titled 'Add Expenses' and features a 'Create New' button. It lists categories like 'eWallet' (All, Trips, Cash Advance, Credit Card, Offline, Recycle Bin) and 'eReceipts' (Receipt Gallery). A list of receipts is displayed, including 'Train / Rail - 56413' for \$57.82 USD, 'Miscellaneous / Other' for \$33.87 USD, 'Meals - 56402' for 4.99 GBP, and 'Hotel' for 477.13 USD. A blue arrow points to the first receipt tile.

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

CHROME RIVER

Expenses For Christian Andia

Recruiting March 2020

DATE	EXPENSE	SPENT	PAY ME
Click "+" to add your first item.			

Expense Report: 010020700063

Total Pay Me Amount: 0.00 USD

Submit

Add Expenses

Create New

eWallet

- All
- Trips
- Cash Advance
- Credit Card
- Offline
- Recycle Bin

eReceipts

- Receipt Gallery

AIR TRAVEL - 56413

GROUND TRANSPORTATION

HOTEL

MEALS - 56402

TELECOM

OFFICE EXPENSES

DUES / FEES

PROFESSIONAL DEVELOPMENT

MISCELLANEOUS

TRAVEL ADVANCE RETURN

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

Cancel Save

Meals - 56402

Date: 04/17/2020

Spent: 0.00 USD

Business Purpose: Recruiting expenses

Description (Optional):

Merchant
Optional

Please type the GL Budget Code you would like to search for in the allocation box below. As you type, a drop down list of matching items will be displayed for selection

Allocation

+ Add Allocation Presets

CREATE PRESET

Attachments (0)



Drag image here to upload

Add Attachments

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.

Allocation

Split Equally

Clear Splits

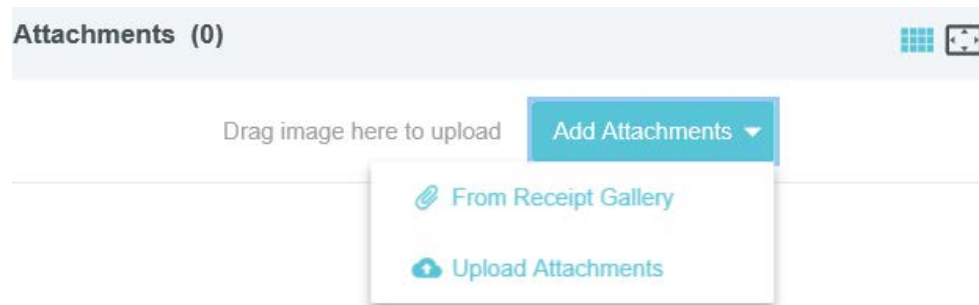
×	067104 Accounting Department 1 - Current Unrestricted	50%	0.00	◀
×	067051 Senior VP for Finance & Admin 1 - Current Unre	50%	0.00	◀
		100%	0.00	

+ Add Allocation Presets

CREATE PRESET

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).

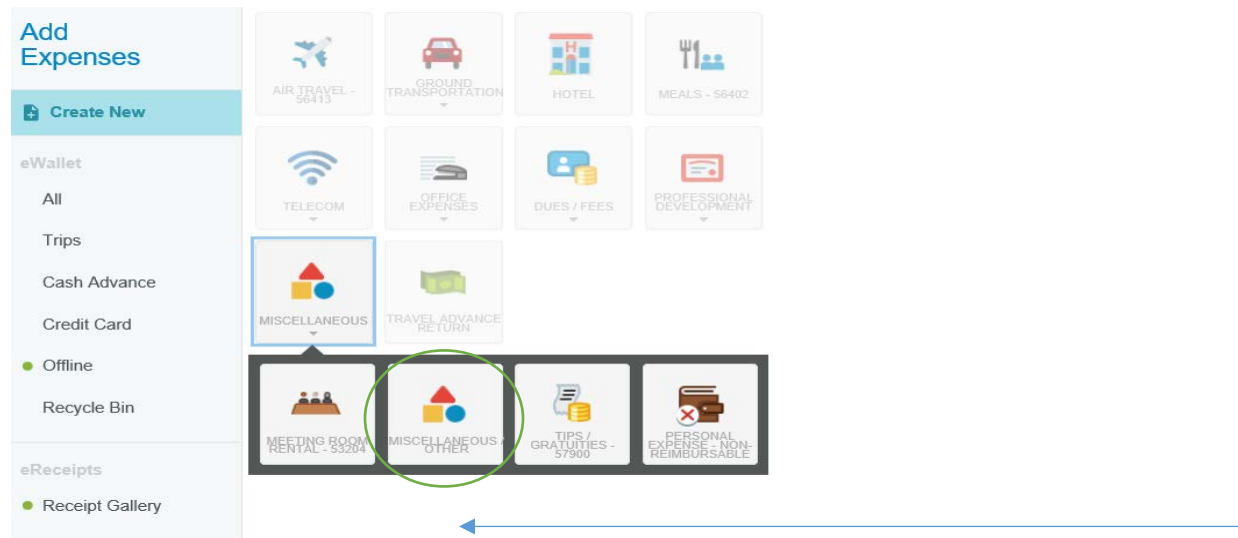
How To Load Attachments To Your Account

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 screenshot shows a form for entering expense details. It includes a 'Merchant' text input field and a 'Misc Expense Object Code' dropdown menu. The dropdown menu is currently set to '-- Select --'. A green circle highlights the 'Misc Expense Object Code' label and its dropdown menu, with a blue arrow pointing from the text above to it.

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**.

The screenshot displays the CHROMERIVER interface for submitting an expense report. On the left, a list of expenses is shown for 'Recruiting March 2020'. The 'Submit' button is circled in green. On the right, the details for a 'Hotel' expense are shown, including the date (04/02/2020), amount (477.13 USD), and business purpose (Hotel stay during recruitment).

DATE	EXPENSE	SPENT	PAY ME
Wed 04/01/2020	Meals - 56402	57.82 USD	57.82
Thu 04/02/2020	Hotel	477.13 USD	477.13
Thu 04/02/2020	Hotel - Lodging - 56...	384.24 USD	384.24
Thu 04/02/2020	Hotel - Meals - 56402	92.89 USD	92.89

Expense Report 010020700063 Total Pay Me Amount 534.95 USD

Hotel

TOTAL AMOUNT 477.13 REMAINING 0.00

Date 04/02/2020

Spent 477.13 USD

Business Purpose Hotel stay during recruitment.

Description

Check In Date 04/02/2020

Check Out Date 04/04/2020

Submit

Previous 2 of 2

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

The screenshot shows a 'Submit Confirmation' dialog box. It contains the following text: 'I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.' There are two buttons: 'Cancel' and 'Submit'. The 'Submit' button is circled in green.

Submit Confirmation

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

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

The screenshot shows the CHROMERIVER dashboard with the following status indicators:

- EXPENSES
- Draft: 0
- Returned: 0
- Submitted Last 90 Days: 1

The 'Submitted Last 90 Days' indicator is circled in green.

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.

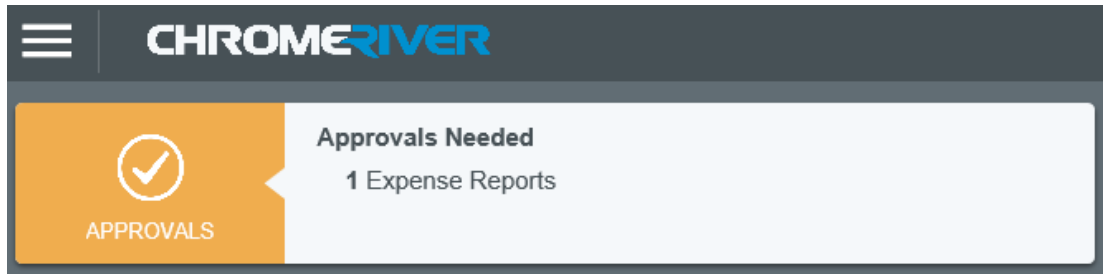
Tracking

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

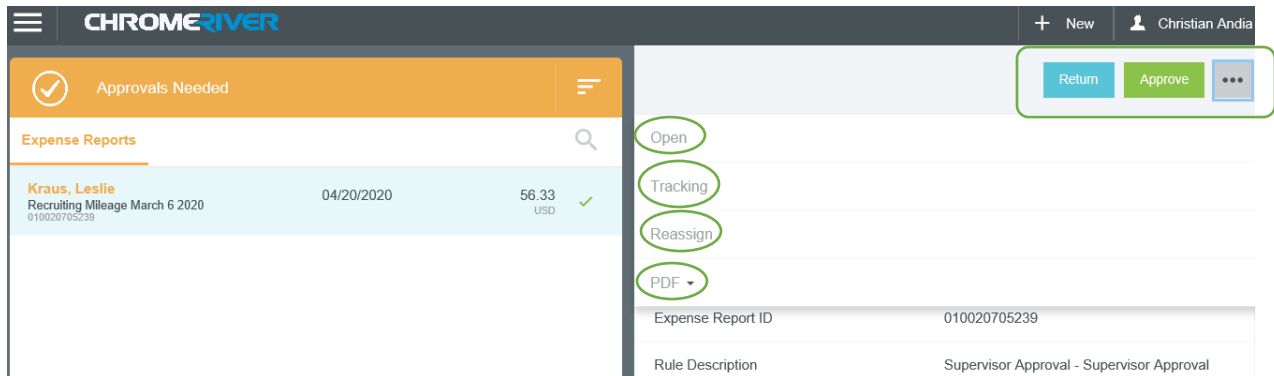
Routing Steps	
Step Number	1
Assigned To	Catherine Bonilla
Assigned To	Catherine Bonilla
Assigned Date	04/18/2020 02:48 PM
Step Status	Assigned
Routing Rule	101500 - Supervisor Approval

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.

Approvals



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**.

The screenshot displays the CHROME RIVER expense management interface. At the top, the user is identified as Christian Andia. The main header shows 'Expenses For Leslie Kraus' with buttons for 'Adjust', 'Return', and a three-dot menu. Below this, a table lists expenses. The first row, 'Recruiting Mileage March 6 2020', is highlighted with a blue arrow. This row shows a date of 'Mon 04/20/2020', an expense type of 'Mileage - 56410', a spent amount of '56.33 USD', and an approved amount of '56.33 USD'. To the right of the table, a dropdown menu is open, showing options: 'Images', 'Reconcile', and 'Reassign', each circled in green. At the bottom of the interface, a summary bar indicates a 'Total Approved Amount' of '56.33 USD' and includes 'Return' and 'Submit' buttons.

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.

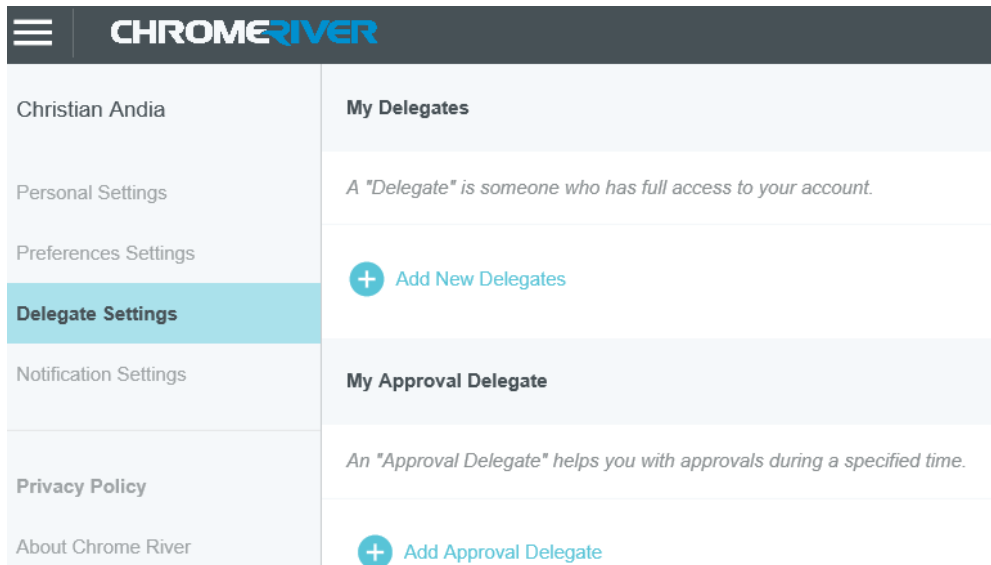
Images- You may view all receipts and support attached to the expense.

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

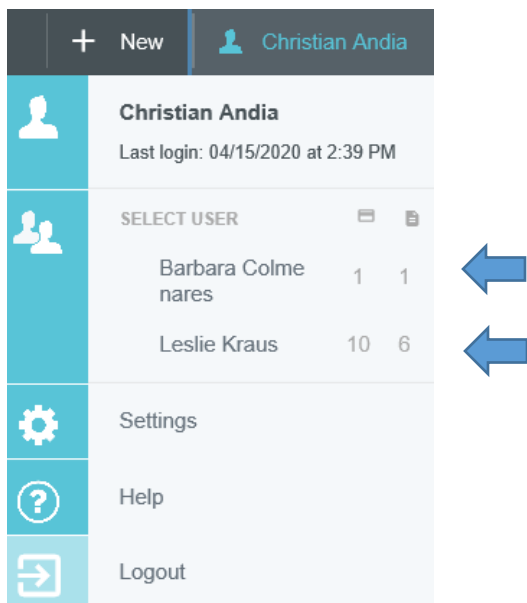
In settings, you may choose **DELEGATES** and/or an **APPROVAL DELEGATE**



The screenshot shows the Chrome River settings interface. On the left is a navigation menu with the following items: Christian Andia, Personal Settings, Preferences Settings, **Delegate Settings** (highlighted), Notification Settings, Privacy Policy, and About Chrome River. The main content area is divided into two sections. The top section is titled 'My Delegates' and contains the text 'A "Delegate" is someone who has full access to your account.' Below this is a button with a plus sign and the text 'Add New Delegates'. The bottom section is titled 'My Approval Delegate' and contains the text 'An "Approval Delegate" helps you with approvals during a specified time.' Below this is a button with a plus sign and the text 'Add 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.



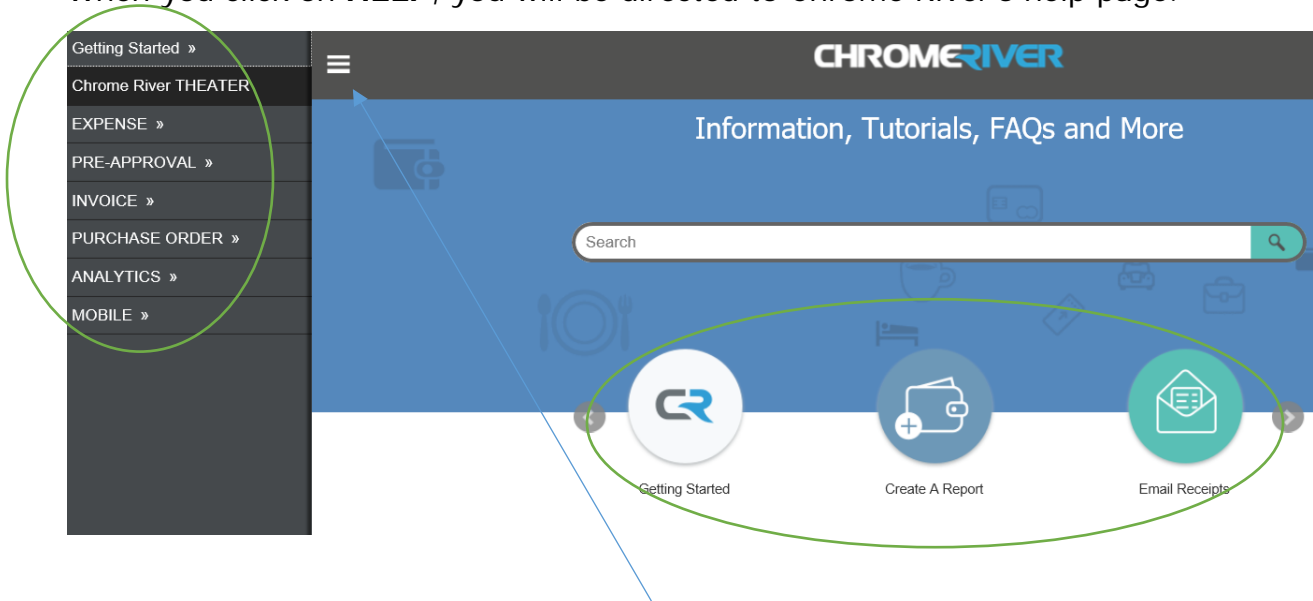
The screenshot shows the user selection interface in Chrome River. At the top, there are two tabs: '+ New' and 'Christian Andia'. Below the tabs is a list of users. The first user is 'Christian Andia' with the last login '04/15/2020 at 2:39 PM'. Below this is a 'SELECT USER' section with a table of users. Two blue arrows point to the 'Barbara Colme nares' and 'Leslie Kraus' rows. Below the table are four menu items: 'Settings', 'Help', and 'Logout'.

SELECT USER			
Barbara Colme nares	1	1	←
Leslie Kraus	10	6	←

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.