SDSU | Research Foundation

Chrome River *Expense Module*

LIVE MAY 20, 2024

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Training Agenda

- Chrome River Module Timeline
- Chrome River Accounts and Allocations
- Stuff we want you to know
- Questions before moving to demo
- Demo! Let's log in and take a look
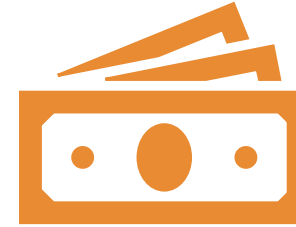- Questions
- Training resources

Go Live Timeline – Past and Future

Phase 1 – Pcard allocations and documentation Completed Fall 2023

Phase 3 – Invoice module – Fall 2024

Payments to Vendors

Payments to individuals without SDSUid

Payments to individuals with Chrome River accounts for payments that are not reimbursements.

Chrome River Go Live Timeline

➤ Phase 2 – Soft launch of Expense Module May 20, 2024
  ➤ Replaces the disbursement form with Chrome River expense reports
  ➤ Miscellaneous reimbursements to individuals with Chrome River accounts
  ➤ Miscellaneous and travel advances/claims

➤ MyRF Document Processing available until Phase 3 completion
  ➤ Request advances in Chrome River only
  ➤ Submit requests in either doc processing or Chrome River – not both

Chrome River Accounts

MyRF used to provision/deprovision accounts

Chrome River uses SSO with SDSU log in credentials

Chrome River account set up: MyRF -> Fund Management -> User Security

- Chrome River Account – Provides user with a Chrome River account and provides access to allocate reimbursements and invoices to the orgs specified. Approval by PI/Fund Manager is required.

Chrome River Allocations

What funds are available in my dropdown selection?

➢Any fund that a user has access to in MyRF

➢Funds where a user is a PI or has signature authority

➢Access to charge on Pcard

➢Employee on fund

➢Chrome River only account

Routing and Delegates

➢ Expense reports are automatically routed based on fund(s) used.
➢ Approvers are emailed when there is a report to approve
  ➢ Can approve via email or can log in to Chrome River for review/approval
➢ Routing progress can be tracked in Chrome River

➢ Users can set up delegates in Chrome River
  ➢ Delegate can prepare expense reports and submit to expense owner for approval
  ➢ Delegate cannot approve on behalf of the expense owner
  ➢ Delegate must have a Chrome River account

Electronic Receipt Management

➢Multiple ways to send receipts to CR
- ➢Snap and Send via Chrome River SNAP app
  - ➢Download available in App stores
- ➢Email forward directly to account
- ➢Drag and Drop!

➢No need to keep paper receipts

➢Expense reports available in MyRF

Chrome River Resources

➢Foundation.sdsu.edu -> Departments -> AP -> Chrome River
  ➢General information
  ➢Links to written and video training materials

  ➢Email questions to sdsurfchromeriver@sdsu.edu

The Moment You've Been Waiting For!