Chrome River User Guide

PCard Allocations

Updated 08/2023

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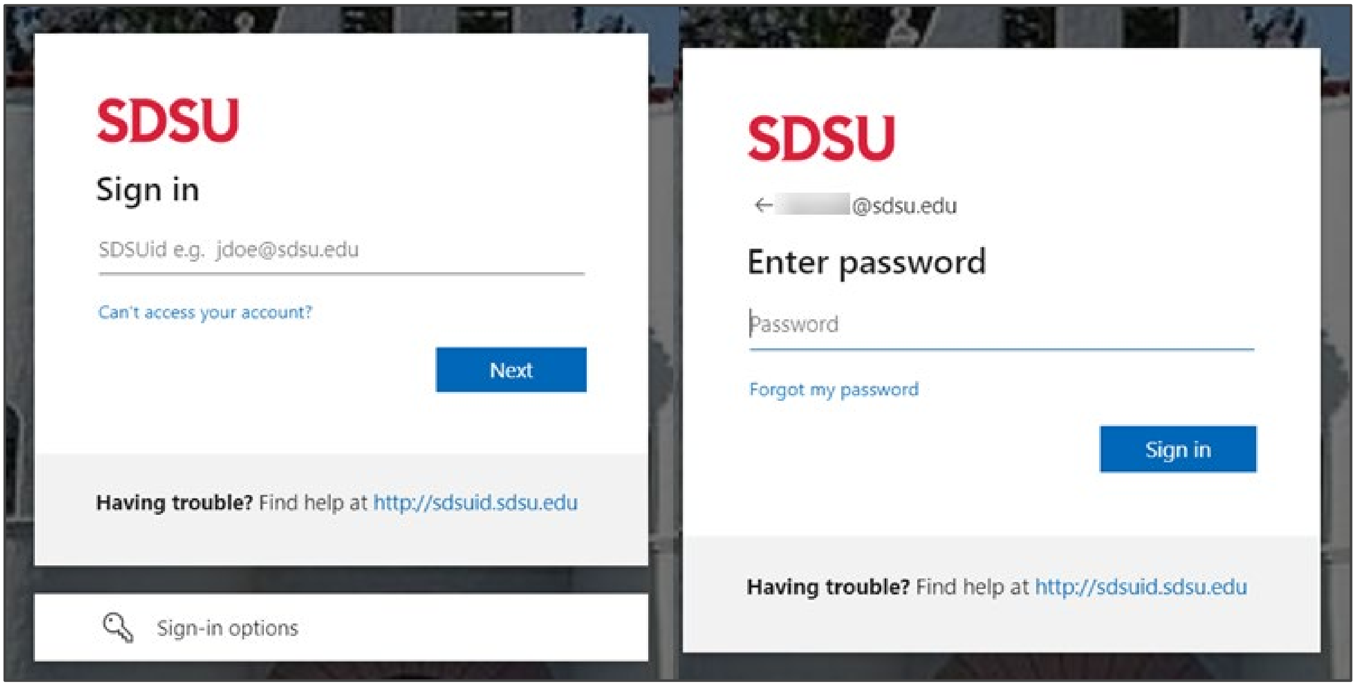
Log in to Chrome River using Single Sign-On (SSO)

Cardholders, delegates, and authorized approvers will login to Chrome River using their SDSUid credentials.

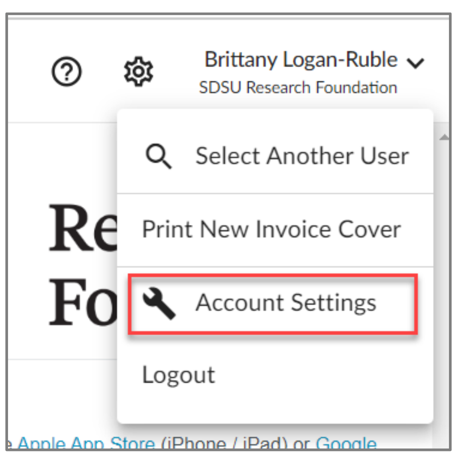


Note: If you have already logged in to an application using SSO you may not need to re-enter your SDSUid and password.

Customize Your User-Account Settings

Specific settings are customizable to control your viewing and working environment within Chrome River.

Click your name in the top right corner of the app, then click **ACCOUNT SETTINGS**.

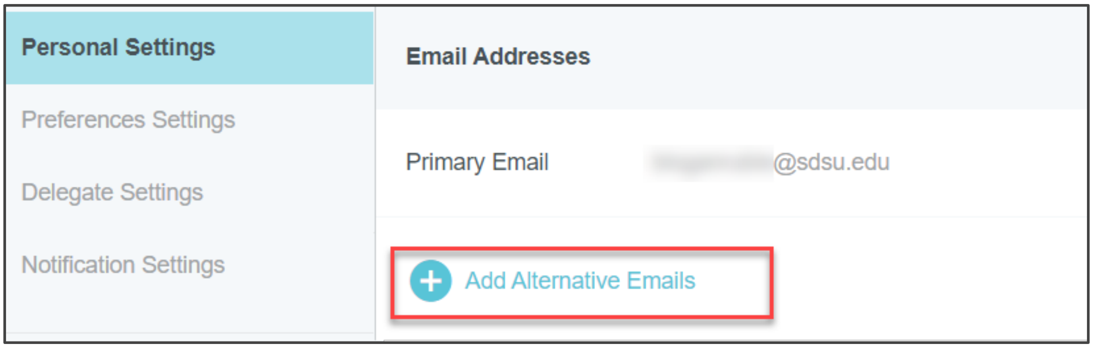


Personal Settings: Email Addresses

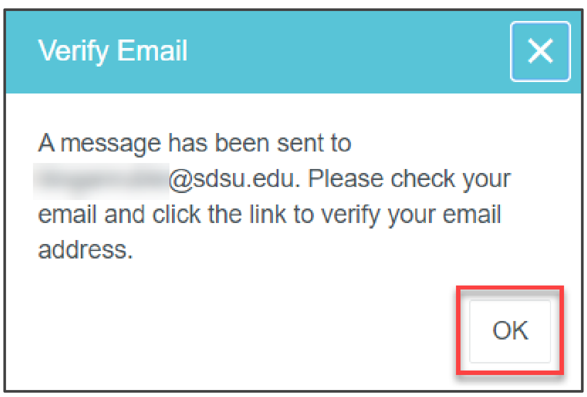
The primary email address associated with your Chrome River is your official SDSU email and cannot be changed. You may add an alternate email from which you wish to submit receipts.

Click **ADD ALTERNATIVE EMAILS** to enter additional email addresses. A verification request will be sent to your SDSU email address.

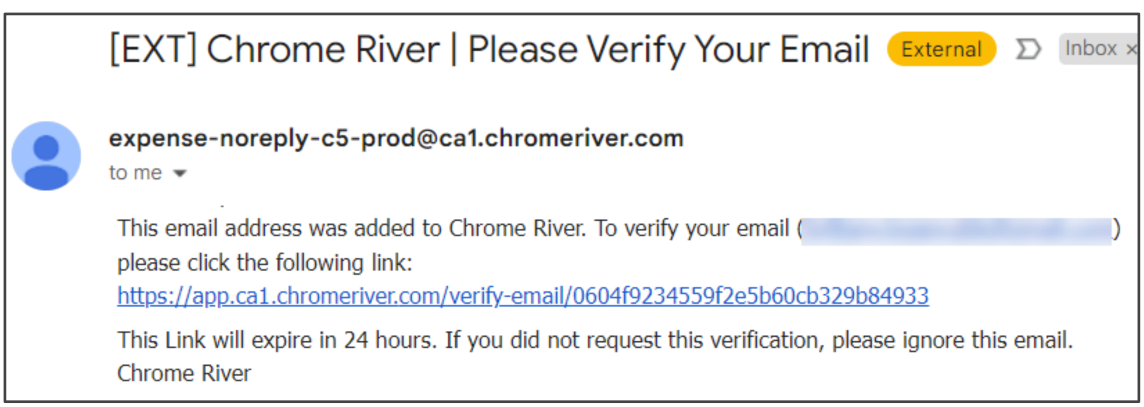
1. Add an alternate email address



2. Click OK on the email verification message



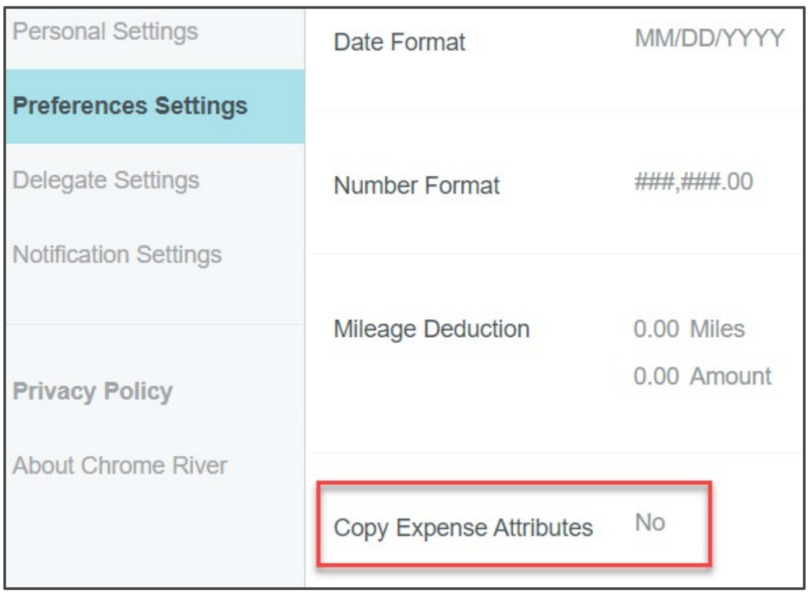
3. Follow the instructions on the verification email sent to your SDSU email address



Preferences Settings

Here you may customize how certain information appears for you in the Chrome River user interface. Click the pencil icon to the right of the setting you wish to change. You may need to log out and back into Chrome River to see certain changes take effect.

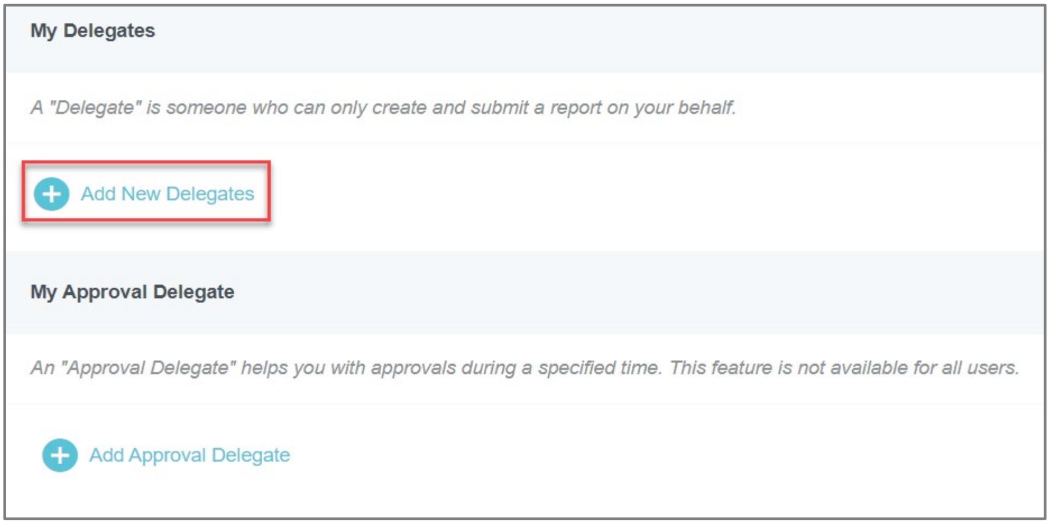
- **Date Format**: Choose between two date formats – MM/DD/YYYY (e.g., 10/20/2020 for October 20, 2020) or DD/MM/YYYY (e.g., 20/10/2020 for October 20, 2020).
- **Number Format**: Choose between two currency formats – ###,###.00 (e.g., $123,456.78) or ###.###,00 (e.g., $123.456,78).
- **Mileage Deduction**: You can automatically deduct the miles or amount of your standard commute in the Mileage entry screen.
- **Copy Expense Attributes**: If you select **YES**, any line item you add on an expense report will automatically populate with the business purpose from the previous line item added.



Delegate Settings

A delegate creates, submits, or approves expense reports on your behalf.

- **Delegate**: Create and submit expense reports. The delegate will receive copies of any email notifications regarding rejection or adjustment of reports. However, they will not be able to approve expenses.
- **Approval Delegate**: Temporarily approves expenses for another approver via email, for example, when they are on vacation. The Approval Delegate setting is only available to SDSU Research Foundation central staff approvers.



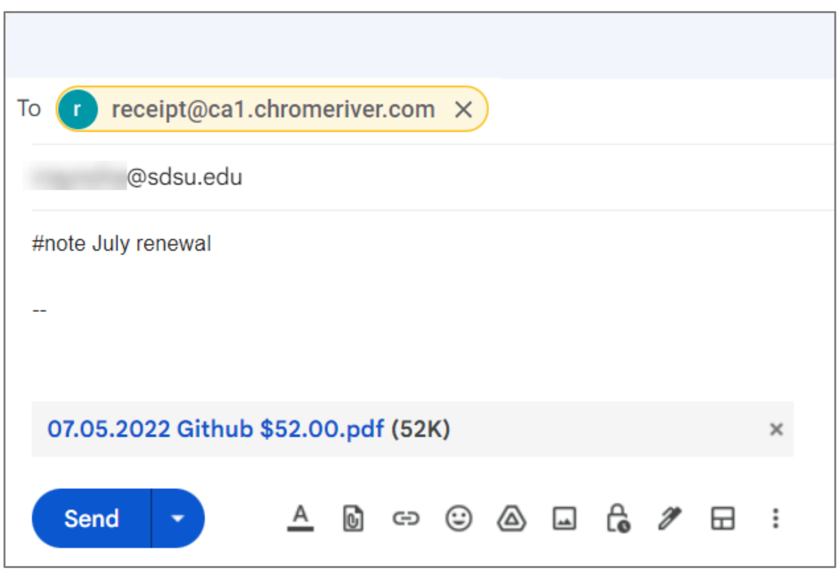
Forwarding Images to Chrome River

Images may be uploaded directly through the application, emailed, or added via the Chrome River SNAP app.

Via Email

Send a new email message containing the following information.

- To: receipt@ca1.chromeriver.com.
- From: the email address associated with your account in Chrome River.
- Attach the receipt image. Only JPG, PDF, PNG, OFD, and TIFF files of less than 10 MB each or 100 MB total can be accepted.
- (Optional) Place #note at the beginning of the body to have the system include the first 1,500 characters (or everything up to the line break) of your message in your eWallet.



Via Chrome River SNAP

The free SNAP app enables you to quickly and easily capture and upload receipt images directly to your Receipt Gallery and the Offline tab of the eWallet for use the next time you access Chrome River. SNAP may also be used to upload images taken with another app on the device.

Click the appropriate link below for complete details on downloading and using SNAP with your mobile device.

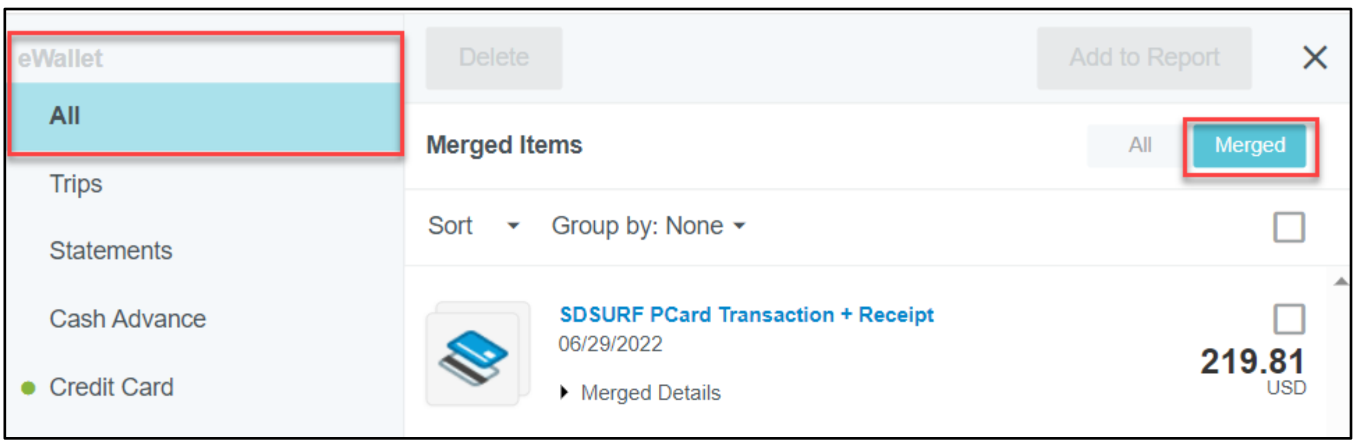
- Chrome River SNAP for Android
- Chrome River SNAP for iPhone

Merge Receipt and Credit Card Transactions

When a receipt is forwarded to Chrome River via the mobile app, email, or uploaded to the eWallet, Chrome River will automatically merge the receipt image with the pcard transaction.

View Merged Transactions

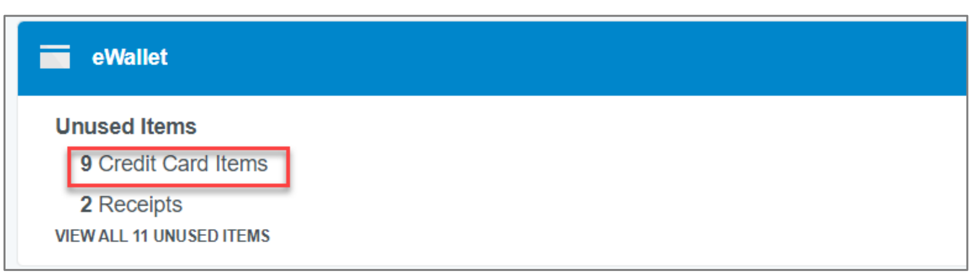
On the **ALL** tab of the eWallet, use the toggle in the upper right corner to switch between viewing all transactions or just the merged ones.



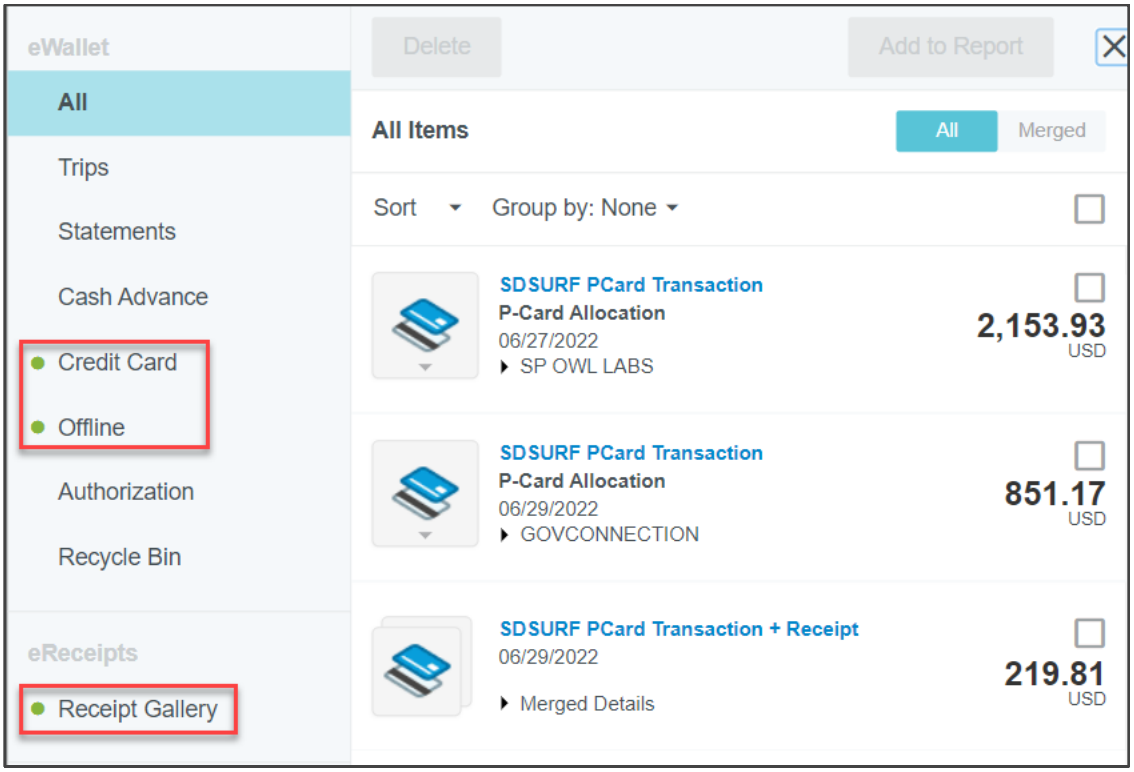
Add Pcard Transactions to an Expense Report

The eWallet contains all the unallocated pcard transactions that have been automatically imported into Chrome River. Transactions are typically available in Chrome River within three business days.

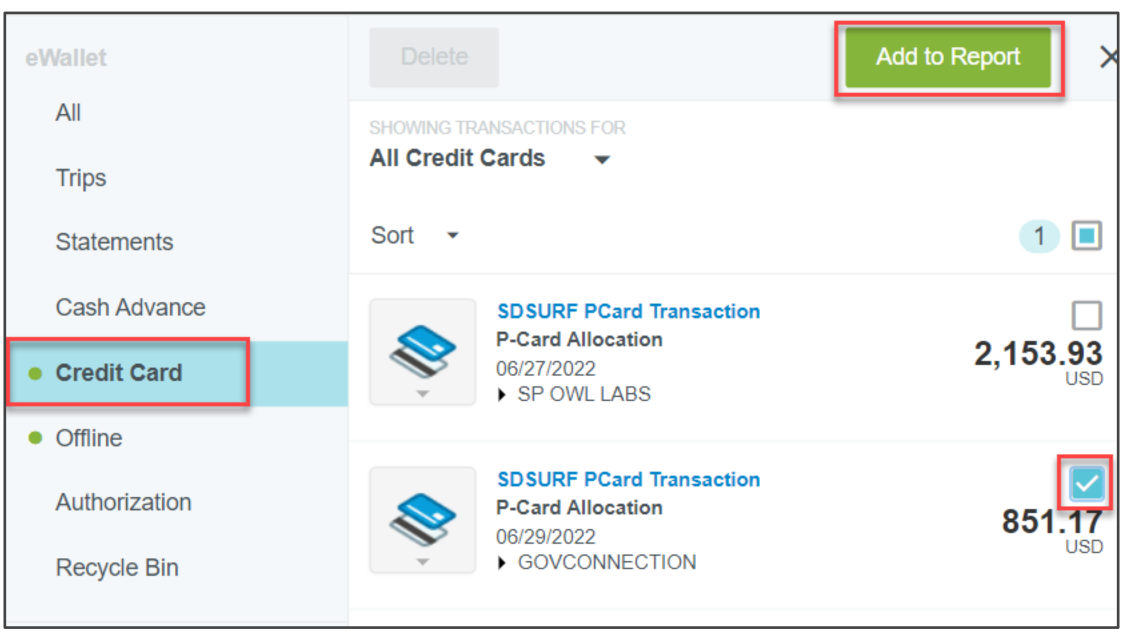
1. Select unused credit card items from the eWallet dashboard



A green dot next to an expense category in the eWallet or the Receipt Gallery indicates that there are unused items or receipts available.



To add one or more transactions to your report, click the check box above each amount. Then click the **ADD** button in the top right.



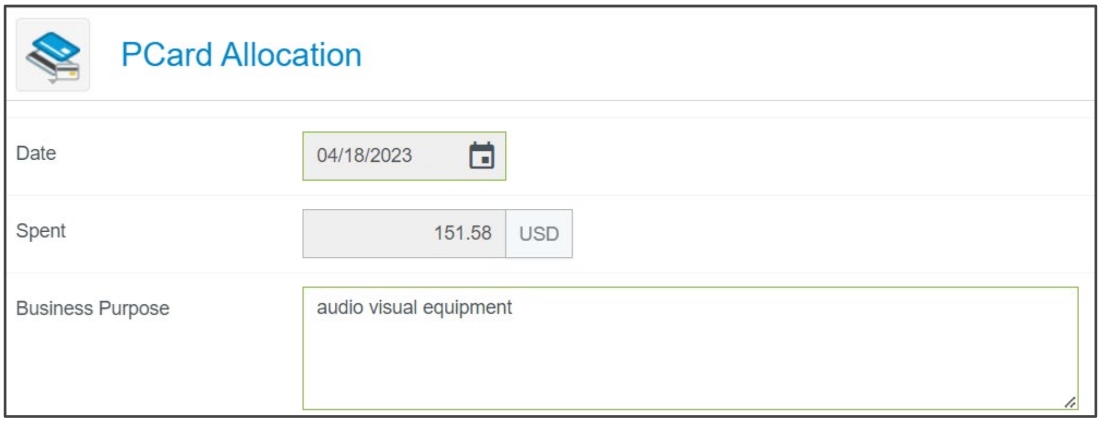
Note: there is a limit of 100 line items per report. A countdown will appear in the expense report header when you are 20 items away from the limit.

Allocate Pcard Transactions on an Expense Report

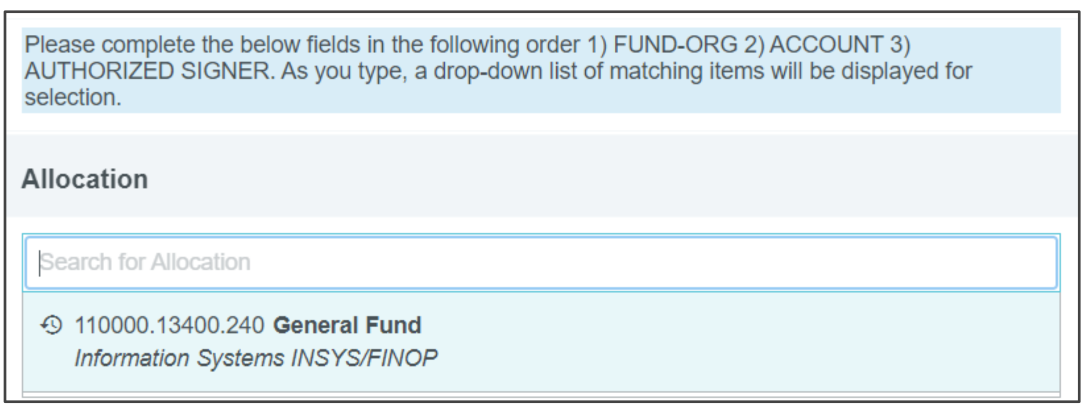
After you select a transaction from the Add Expenses Screen, the Expense Entry screen opens to allow you to enter details about the expense, including the allocation and purpose of the transaction.

Note: The Fund-Org allocation and approver names in the screenshots below are for demonstration only. Allocations are expense owner specific.

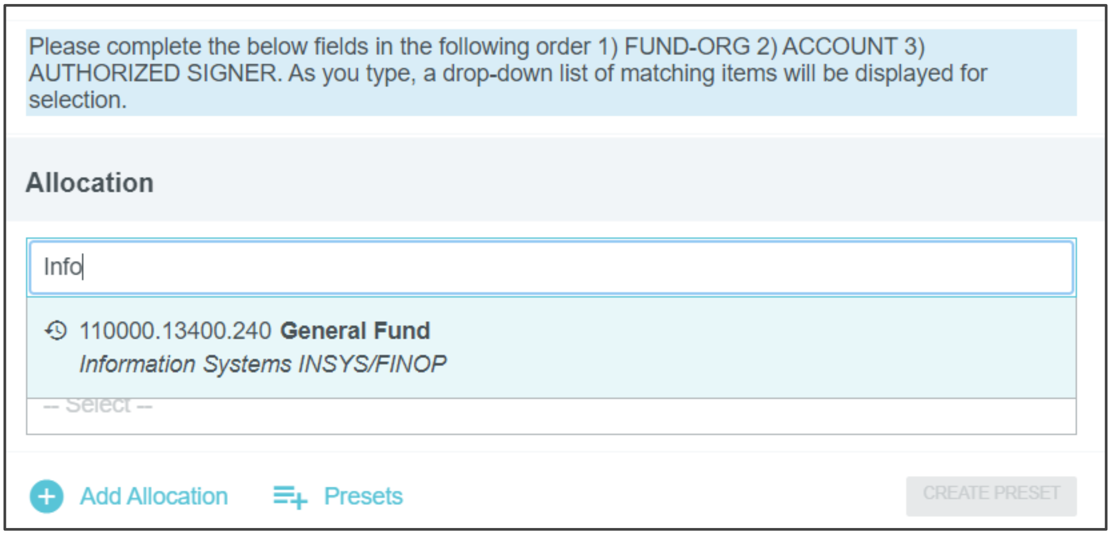
1. Provide a detailed business purpose for the transaction



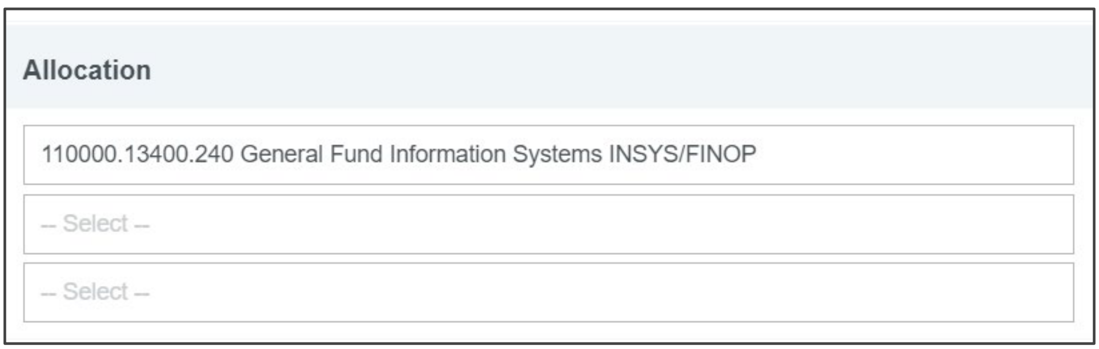
2. Specify the Fund-Org allocation Click the **Search for Allocation** field. Recently selected FUND-ORGs will be listed at the top and indicated by a clock icon



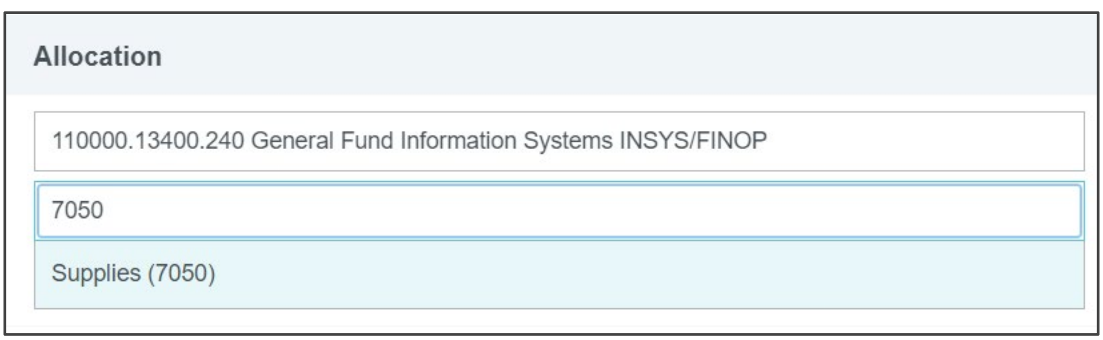
As you begin to enter a fund-org name or number into the search bar, the list will automatically scroll to allocations containing that text. Click the desired allocation to select it.



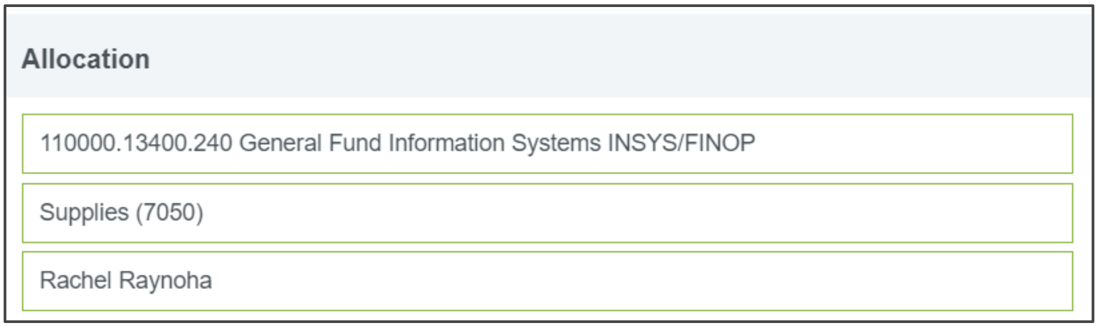
Once a fund-org allocation is selected, two additional drop downs will appear.



3. Select the appropriate account code from the second drop down.

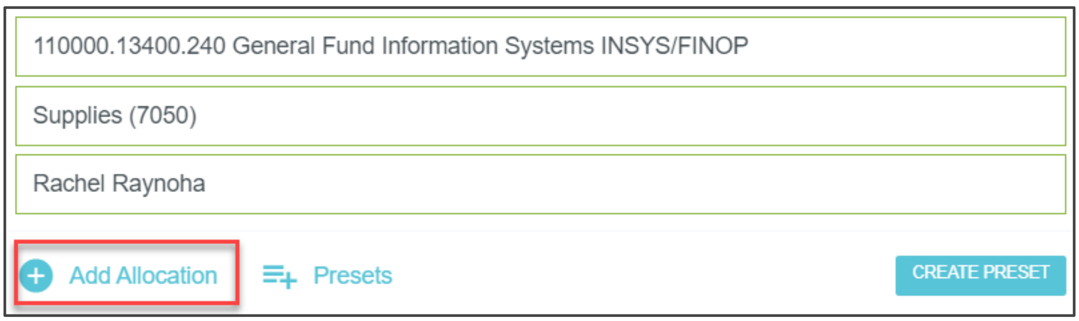


4. Select the appropriate approver from the third drop down.

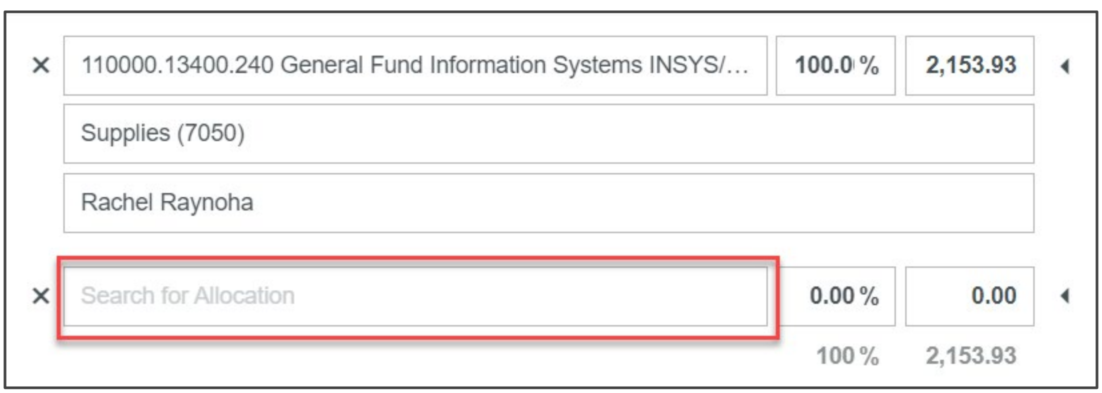


Split Allocation

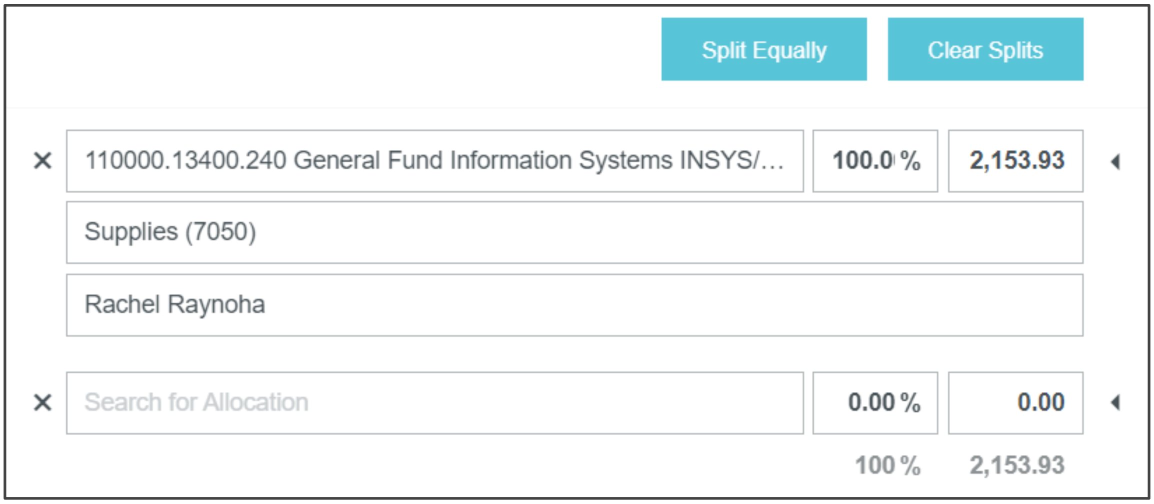
Chrome River gives users the ability to split one expense among multiple allocations. Once the Click **+ ADD ALLOCATION**.



Two allocation fields will appear, with the first allocation populated at 100%. Click **Search for Allocation** to open fund-org list and scroll or begin typing to find the desired allocation.



By default, the expense will be split evenly among them. You may manually change the allocation amounts by changing the percentage or amount next to each allocation. The total percentage will be shown in gray at the bottom so you can be sure the adjusted amounts add up to 100%.

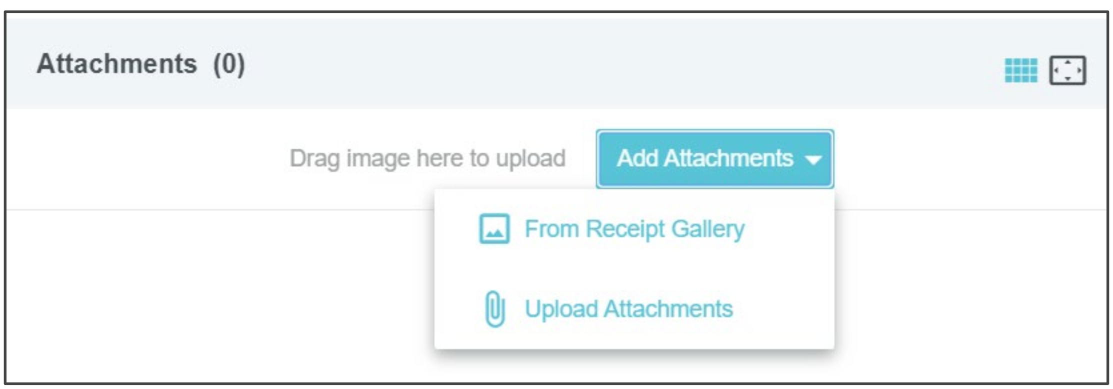


NOTE: It is best to manually change the allocation amounts after all allocations have been added, since the amounts will redistribute equally as each new allocation is added.

- Click **ADD ALLOCATION** to include more allocations for the split.
- Click **SPLIT EQUALLY** to distribute the expense equally among all allocations.
- Click **CLEAR SPLITS** to zero out all but the first allocation, which will be allotted 100% of the expense.
- Click the **X** on the left to remove an allocation.

5. Attach receipt images

Use the Attachments section to add receipt images to your line item from your Receipt Gallery or from your computer.

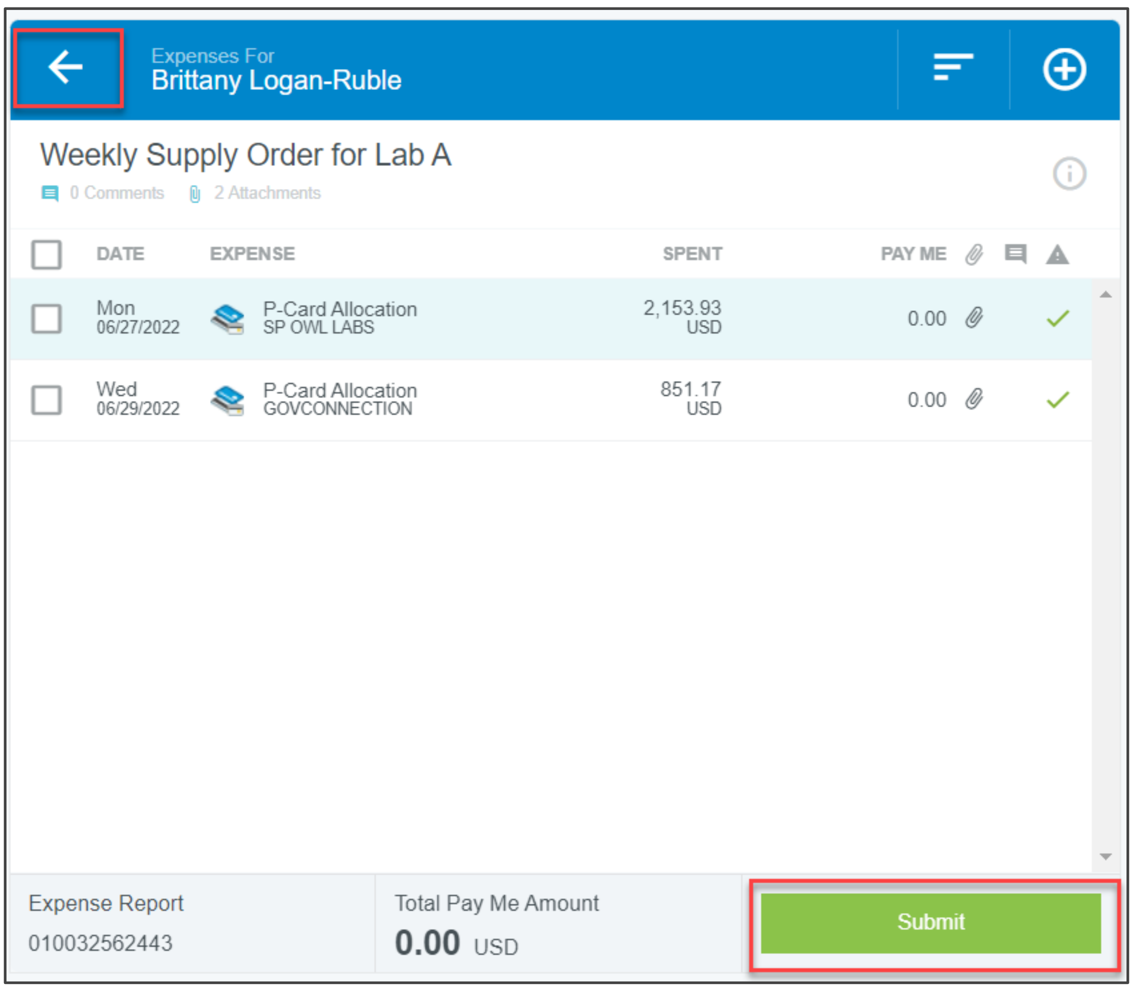


6. Save Transaction Details.

Once the business purpose, allocation header, and attachments header have been completed , click SAVE to add the line item to your report.

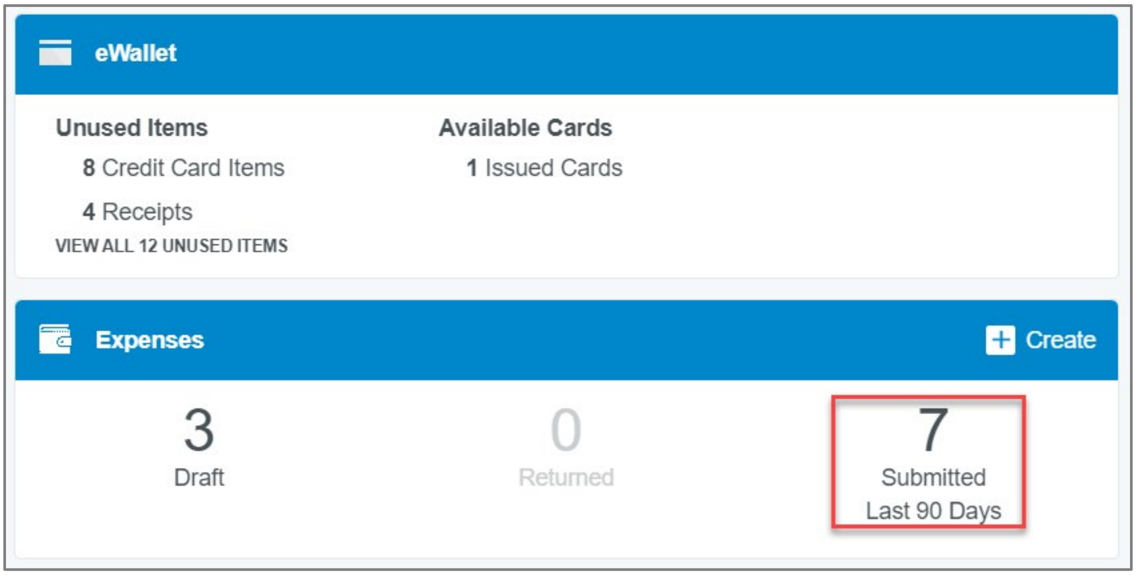
7. Close or submit your report

When you are done adding expenses to a draft report, you may click the **BACK ARROW** in the upper left-hand corner to close the report and save it in Drafts for later. If the report is ready to be submitted for approval, click the green **SUBMIT** button.

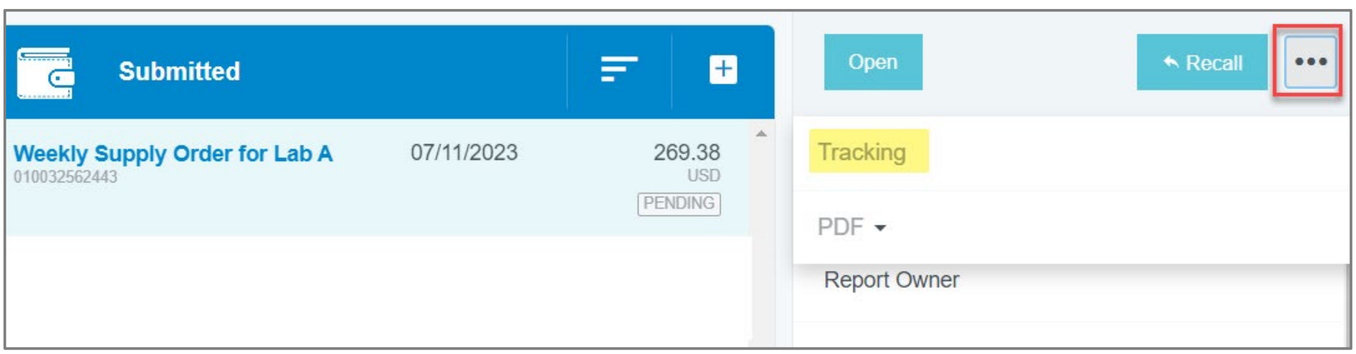


Track Your Submitted Expense Report

Once you click **SUBMIT**, the expense report will appear in your Submitted list.



From there, you may track its progress through the approval routing process by selecting it, clicking the three dots above the preview, and then selecting **TRACKING**.



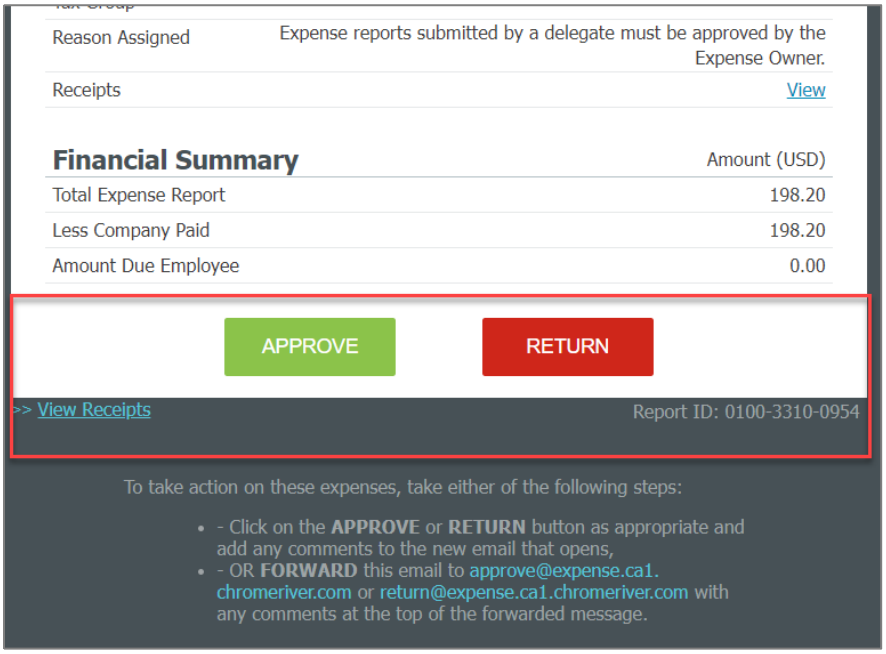
Click an item to see where it is in the approval process, including the approver to whom it is currently assigned, the date, and the rule that triggered the assignment.

Review and Approve an Expense Report

Chrome River will send an email when an Expense Report is available for review and approval. You may only approve or return a report via this method—**any line-item adjustments must be made in Chrome River online**.

Email Approval

From the email you may approve all line items or return all line items to the expense owner with questions or comments simply by clicking the ACCEPT or RETURN at the bottom of the email.



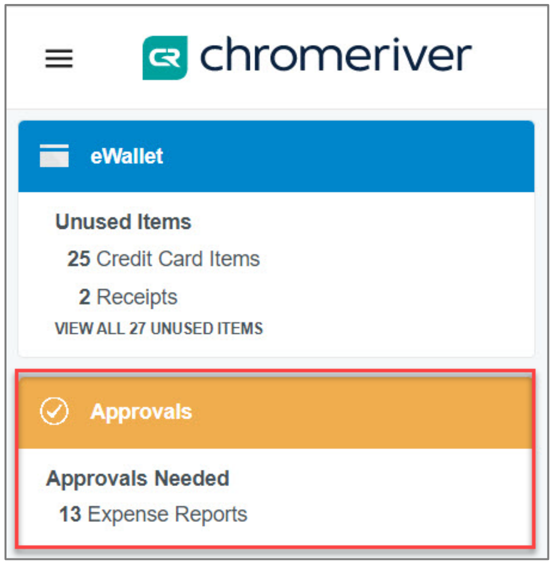
To approve or return only specific line items on a report, you will need to log into Chrome River to approve.

Expense Report Approval Failure Notification

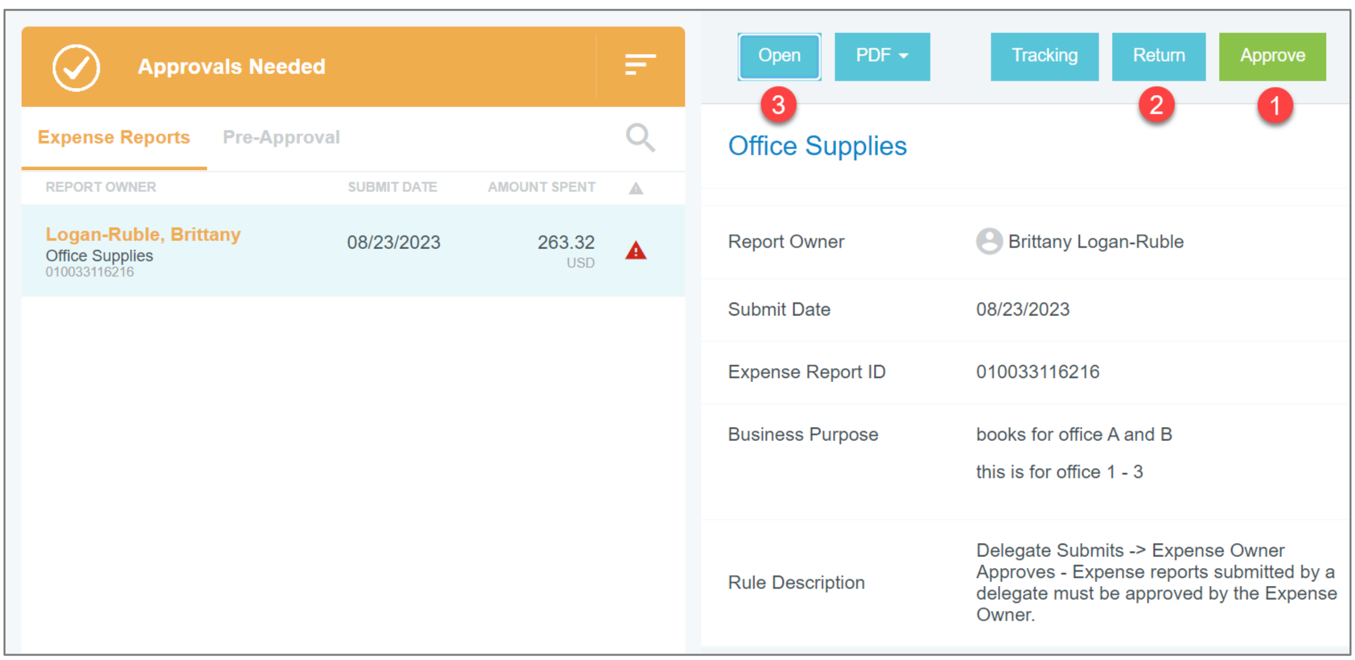
If you attempt to approve via email an expense that has since changed—for example, if the expense owner has recalled and resubmitted the report—you will receive an Expense Approval Failure Notification email alerting you to reattempt your approval via the most recent approval email notification for that report.

Approval in Chrome River

If you have items awaiting your approval, you will see an orange Approvals dashboard



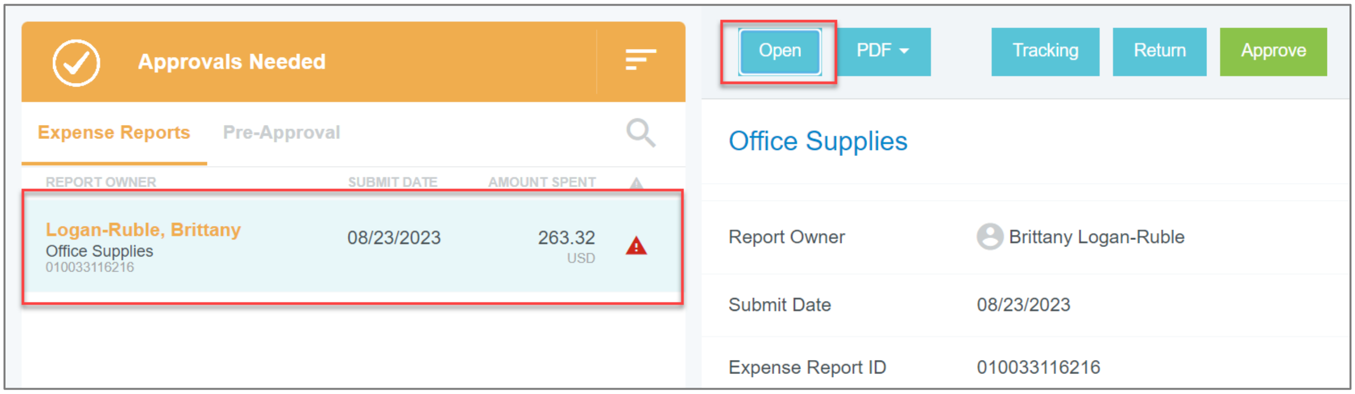
Select a report to review. Once selected, you will have three options



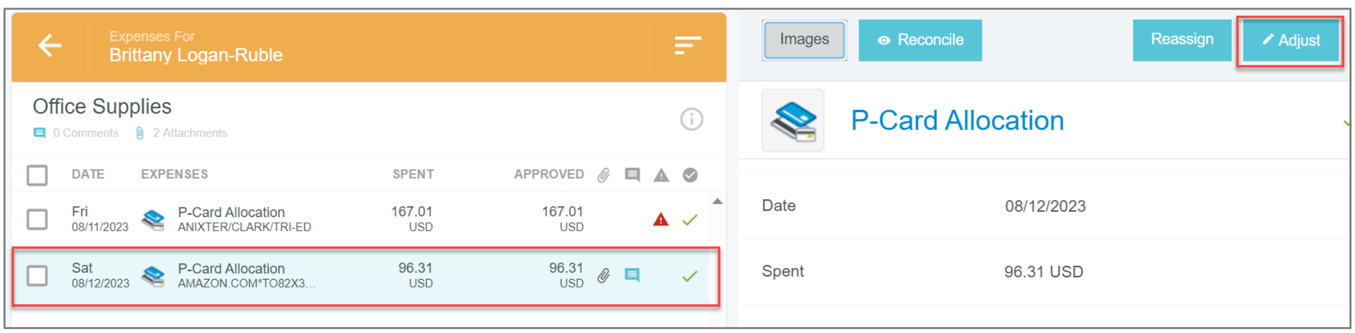
1. Approve report
2. Return the report to the expense owner
3. Open + adjust line items

Adjust Line Items

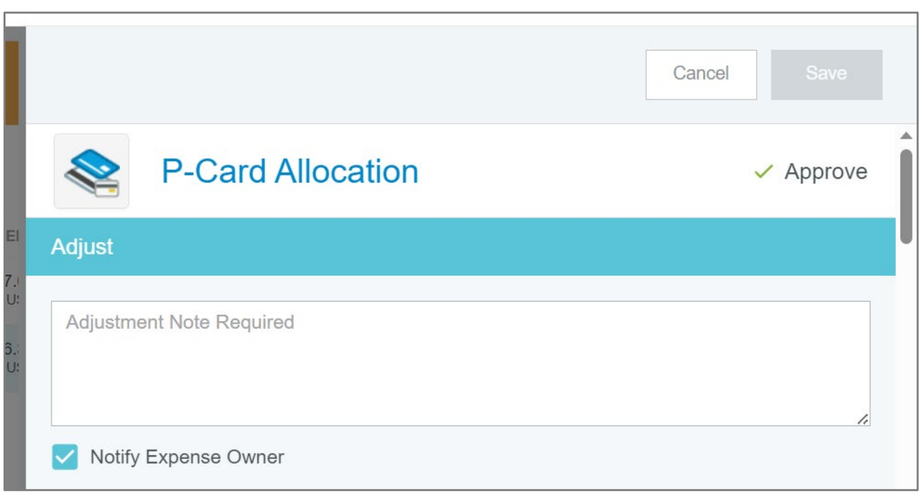
Approvers may adjust line item allocations. Select and OPEN the report to view the line item details.



Select the link item you want to review, then click ADJUST.



You will be required to add an Adjustment Note. Adjustment notes have a 2,000-character limit.



Click SAVE When you have made all the desired adjustments and are ready to complete the approval