



# Chrome River Expense Quick Reference Guide



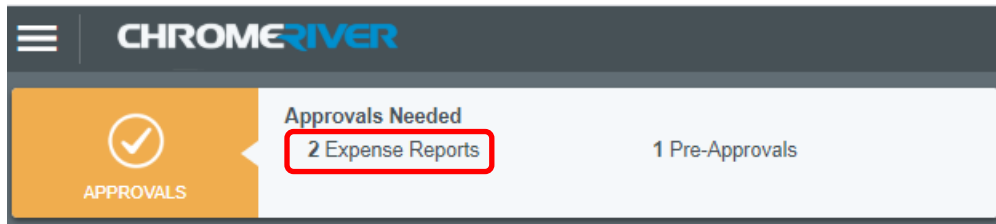
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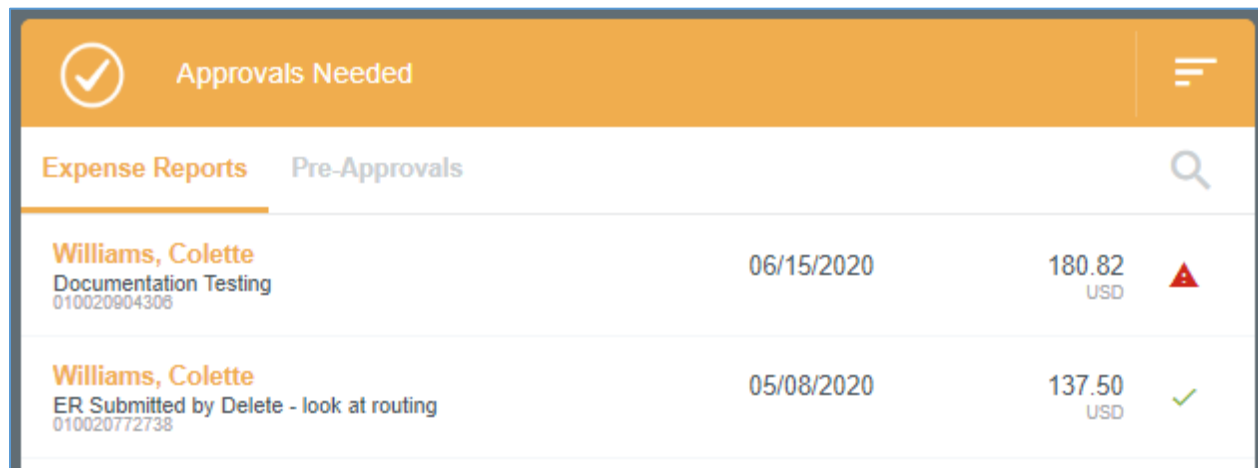
## Approving Expense Reports

### Selecting Expense Report to Approve Inside Chrome River

If you are part of the approval process and have items awaiting your approval, you will see an orange notification bar for **Approvals Needed** at the top of the Dashboard.



Tap on **Expense Reports**. The **Approvals Needed** list displays all the expense reports awaiting your approval.



Tap on the expense you wish to view, and a preview will open on the right.

In the report preview, you can view the report details, Financial Summary, Expense Summary, Account Summary, Applied Pre-Approval Reports and Comments.

If the expense you are approving has a linked pre-approval, you may view the details by tapping the PDF download button next to the name of the Applied Pre-Approval Report. This allows you to easily compare the original pre-approval to its associated expense report.

<span>Open</span> <span>PDF</span> <span>Tracking</span> <span>Return</span> <span>Approve</span> <span>...</span>		
<b>Financial Summary</b>		
	AMOUNT (USD)	APPROVED (USD)
Total Expense Reported	180.82	180.82
Amount Due Employee	180.82	180.82
<b>Total Expenses For Approval</b>	<b>180.82</b>	<b>180.82</b>
<b>Applied Pre-Approval Report</b>		
DATE	REPORT NAME	AMT (USD)
06/15/2020	<a href="#">Documentation Test 1</a> <span>PDF</span>	180.82
<b>Remaining Balance</b>		<b>413.53</b>
<b>Expense Summary</b>		
	AMOUNT (USD)	APPROVED (USD)
Room	151.00	151.00
Taxes & Fees	29.82	29.82
<b>Total</b>	<b>180.82</b>	<b>180.82</b>

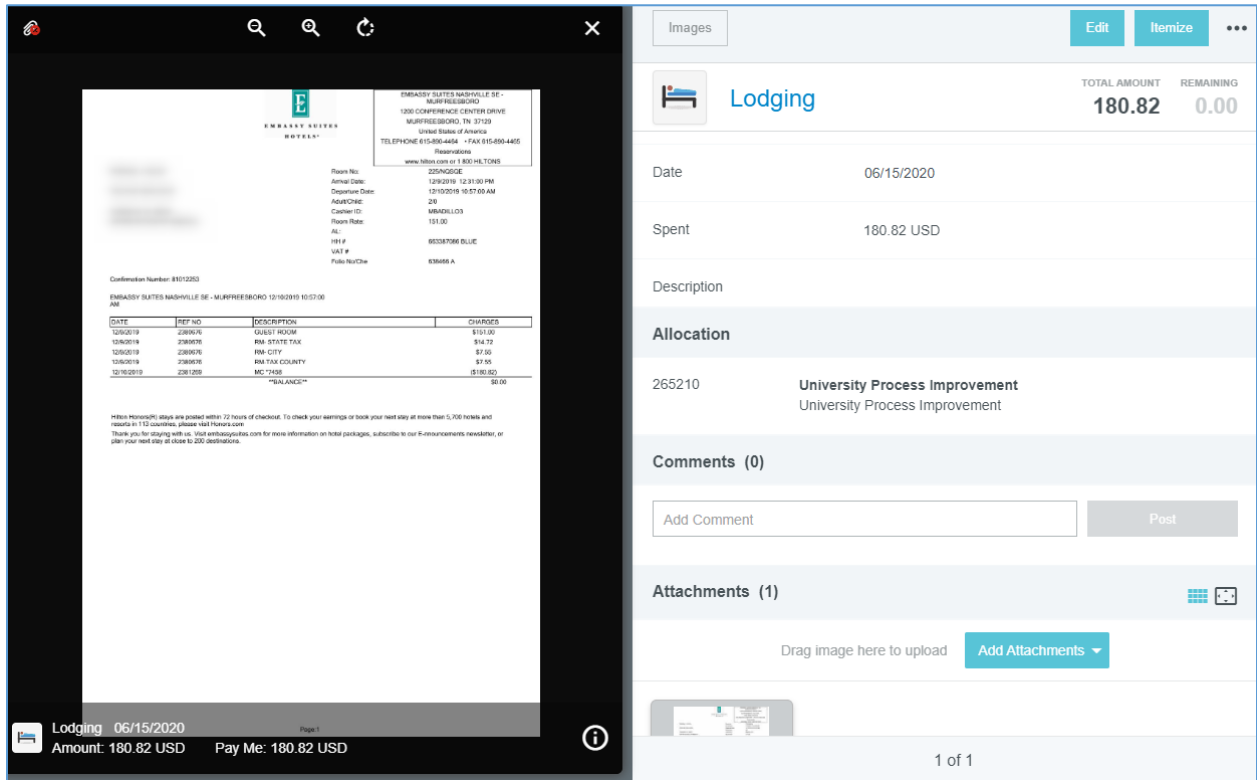
### Approve from inside the expense report

Double click on a report in the Approvals Needed list to open it or click on the report and then click **Open**.

Expenses will be listed on the left side of the screen. To view details of an expense, click once on the expense and the right side of the screen will display the details, including receipts.

Click on each expense line item to view the details.

On the expense entry item, click on **Images** to see the Receipt image and expense information side-by-side on the same screen.



The screenshot displays the Chrome River interface for a Lodging expense. On the left, a receipt is shown for Embassy Suites Nashville SE. The receipt includes the following details:

- Room No: 2294052E
- Arrival Date: 12/9/2019 12:31:00 PM
- Departure Date: 12/10/2019 10:57:00 AM
- Agency: 24
- Cashier ID: MRADLLO3
- Room Rate: 151.00
- Room Type: SU
- Room No/Cha: 65338766 BLUE
- Rate #: 638666 A

The receipt also includes a table of charges:

DATE	REF NO	DESCRIPTION	CHARGES
12/09/19	228976	GUEST ROOM	\$151.00
12/09/19	228976	RM STATE TAX	\$14.72
12/09/19	228976	RM CITY	\$7.00
12/09/19	228976	RM TAX COUNTY	\$7.00
12/10/19	228128	MC 7436	(\$18.82)

At the bottom of the receipt, it states: "TOTAL AMOUNT 180.82 USD".

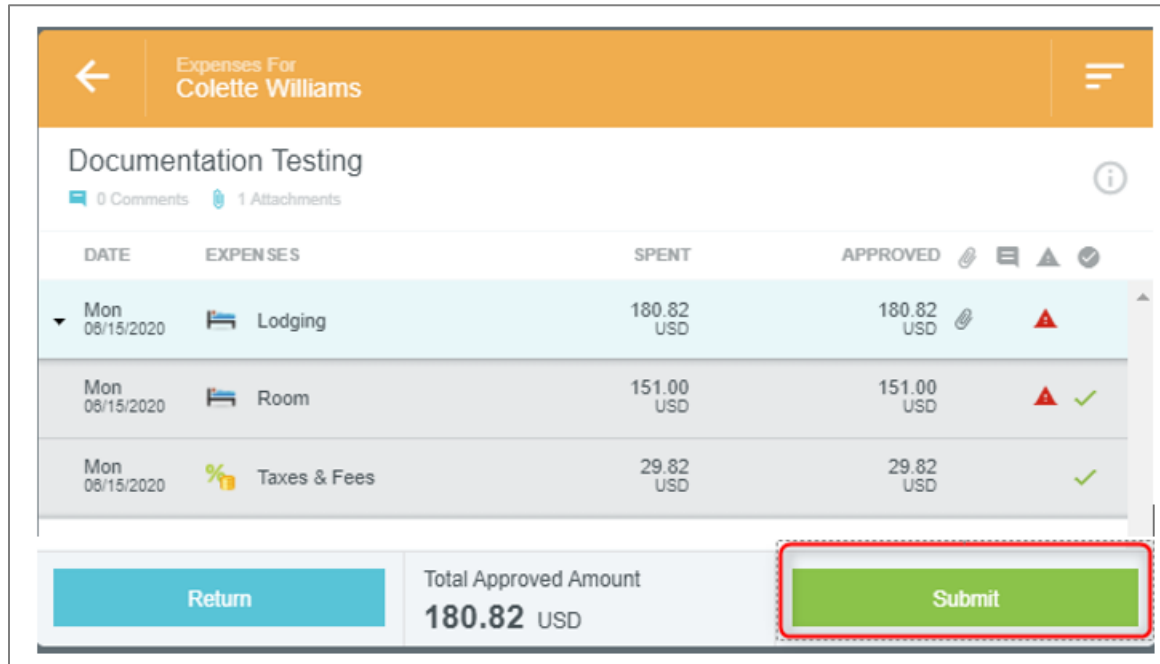
On the right side of the interface, the expense summary is shown:

- Lodging** (TOTAL AMOUNT: 180.82, REMAINING: 0.00)
- Date: 06/15/2020
- Spent: 180.82 USD
- Description: [Blank]
- Allocation: 265210 University Process Improvement
- Comments (0)
- Attachments (1)

For lodging expenses, click on the parent expense entry line to view the itemized entry lines.

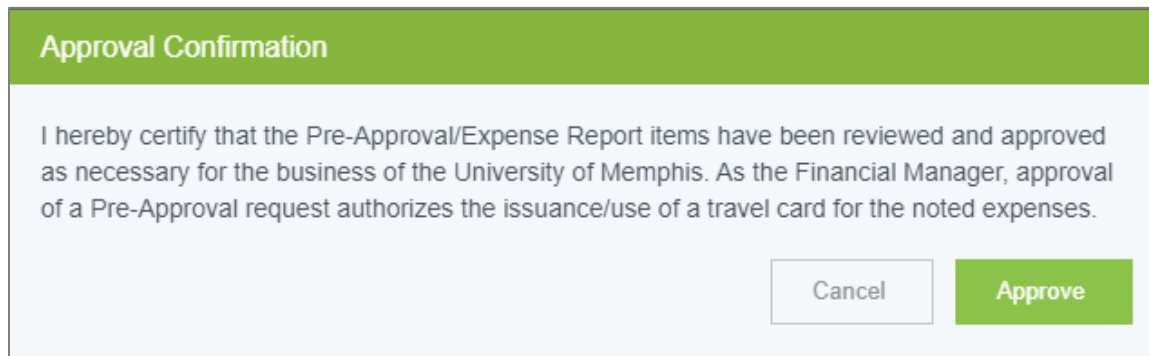
DATE	EXPENSE	SPENT	PAY ME
Mon 06/15/2020	Lodging	180.82 USD	180.82
Mon 06/15/2020	Room	151.00 USD	151.00
Mon 06/15/2020	Taxes & Fees	29.82 USD	29.82

After you have reviewed the report and are ready to approve, click the **Submit** button at the bottom of the expense list.



After clicking **Submit**, a submit confirmation will be displayed.

On the Submit Confirmation window, click **Submit** to move the expense report to the next approval routing step.



**NOTE:** The approval function within a report is indicated using the Submit button due to the system needing to recalculate the report in the event there were adjustments made by the approver. Once the Submit button has been clicked, the Submit Confirmation screen will appear.

If there is a discrepancy, request the expense owner to perform a **Recall** action.

## Approving an Expense Report by Email

Chrome River will email approvers expense reports requiring their approval. Approvers have the ability to approve all expenses on the report for payment or return all expenses on the report to the expense owner with questions or comments from within the email. Approving or returning specific line items within an expense report requires the approver to log in to the Chrome River application, which can be done through the link at the bottom of the email.

The email approver receive includes most of the details of the report, including the ability to view receipts associated with each expense. At the bottom of the email, approvers can view an expense summary and will see **APPROVE** or **RETURN** buttons.

**ACTION REQUIRED**
Chrome River

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Expense Report for **Shruti Bapat [Business Process Analyst]**  
 Report Name **test for Colette**  
 Submit Date **07/29/2022**  
 Expense Dates **07/29/2022 - 07/29/2022**  
 Total Expenses **100.00 USD**

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**Account Summary** Amount (USD)

265210 University Process Improvement	University Process Improvement	100.00
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**Pre-Approval Summary** Estimated (USD)      Submitted

Miscellaneous / Other	100.00	100.00
<b>Totals</b>	<b>100.00</b>	<b>100.00</b>

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**Expense Details**

<b>07/29/2022</b>	<b>Miscellaneous / Other</b> University Process Improvement	<b>100.00 USD</b>
	265210 University Process Improvement	

Business Purpose Test  
 Description test test test test  
 Reason Assigned Review for Approval  
 Receipts [View](#)

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**Financial Summary** Amount (USD)

Total Expense Report	100.00
Less Company Paid	0.00
Amount Due Employee	100.00

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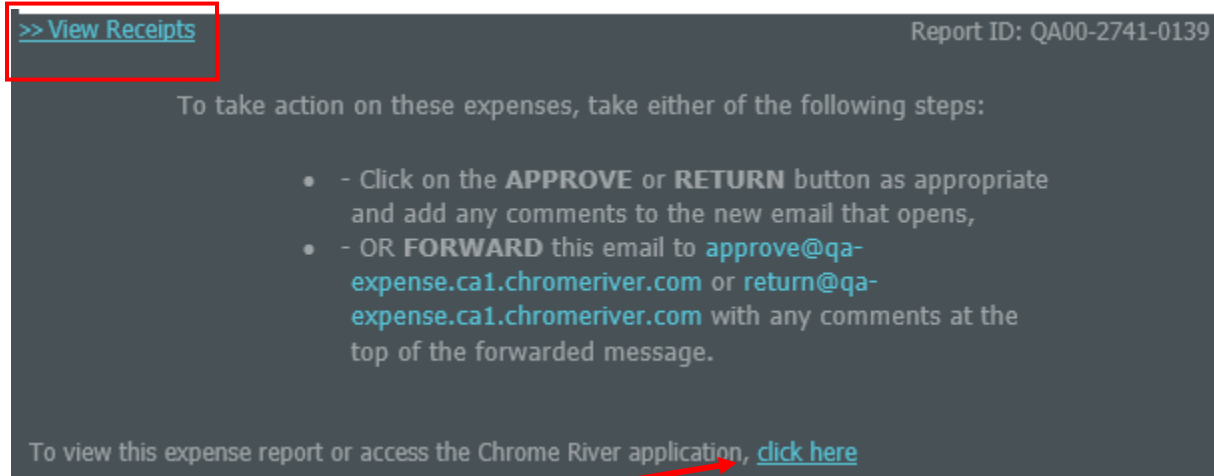
**Expense Summary** Amount (USD)

Miscellaneous / Other	100.00
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APPROVE

RETURN

Note that at the bottom of the report you can click the **VIEW RECEIPTS** link to view a PDF of all receipts attached to the report. (Expense Reports only).



>> [View Receipts](#) Report ID: QA00-2741-0139

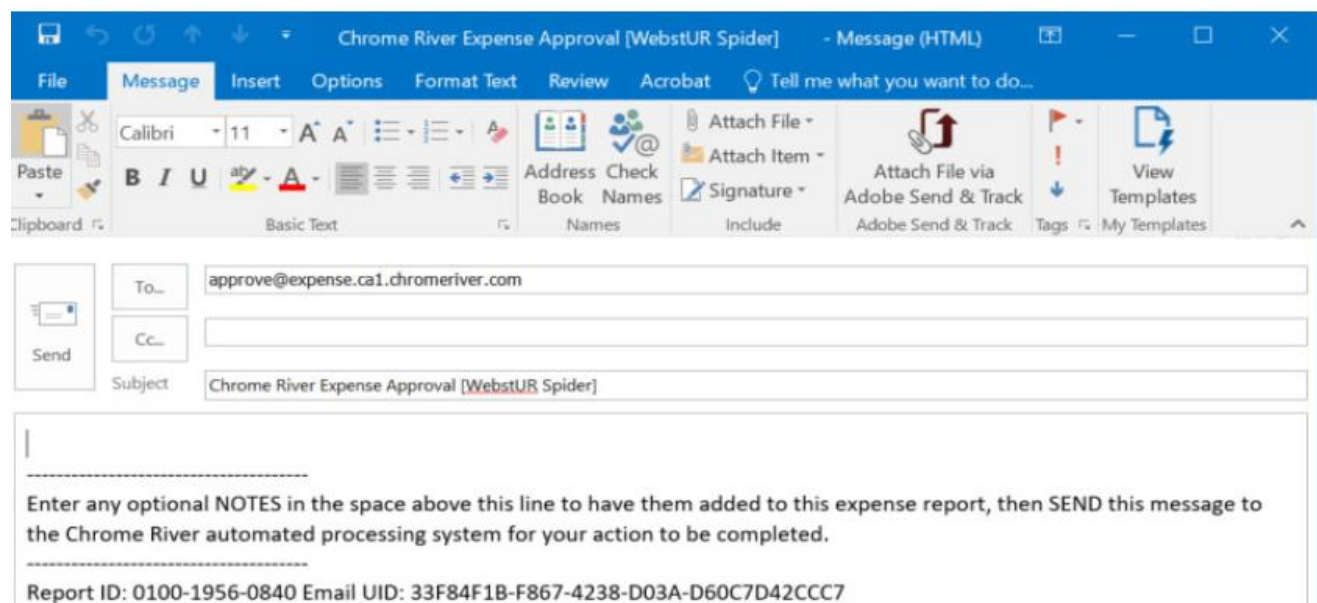
To take action on these expenses, take either of the following steps:

- Click on the **APPROVE** or **RETURN** button as appropriate and add any comments to the new email that opens,
- OR **FORWARD** this email to [approve@qa-expense.ca1.chromeriver.com](mailto:approve@qa-expense.ca1.chromeriver.com) or [return@qa-expense.ca1.chromeriver.com](mailto:return@qa-expense.ca1.chromeriver.com) with any comments at the top of the forwarded message.

To view this expense report or access the Chrome River application, [click here](#)

Tap the **View** link in the Expense Details section at the bottom of the email to be taken directly to the report in the Chrome River app.

To approve a report by email, click the **APPROVE** button. This will bring up a new email window that you will need to **SEND**. (If when clicking the **APPROVE** button, an email window does not automatically open, you can forward the email to [approve@ca1.chromeriver.com](mailto:approve@ca1.chromeriver.com)). This email must be sent from your MEMPHIS email address. If you have any comments you would like to include on the report, you can type them into the body of the email before sending, and they will be added to the report. (This is optional). Once you hit send, the system will be notified of your approval, and the report will move forward in the approval queue.



Chrome River Expense Approval [WebstUR Spider] - Message (HTML)

File Message Insert Options Format Text Review Acrobat Tell me what you want to do...

Paste Calibri 11 A A Address Check Attach File Attach Item Attach File via Adobe Send & Track View Templates

Clipboard Basic Text Names Include Adobe Send & Track Tags My Templates

To:

Cc:

Send

Subject:

Enter any optional NOTES in the space above this line to have them added to this expense report, then SEND this message to the Chrome River automated processing system for your action to be completed.

Report ID: 0100-1956-0840 Email UID: 33F84F1B-F867-4238-D03A-D60C7D42CCC7

### Return for Correction

To return the report, click the **RETURN** button. This will also bring up a new email window that you will need to **SEND**. You can enter an explanation for why you are returning the report that will be provided to the report submitter. Once you hit send, the system will return the report to the submitter for corrections. If an approver returns a report, the resubmitted report will route back to the same approver and will not require additional approval from previous approvers, if applicable.

### Approve from Expense Report Preview within the Chrome River application

UofM **recommends** approvers to review the full details of expenses, including receipts, prior to approving a report. Using the approve function from preview should be limited to expense reports that contain one or two expense items, and don't have expense details that need to be reviewed.

Clicking Approve **immediately approves** the report. Once the approver has confirmed the approval and clicks the second Approve button, the entire report will move to the next step in the approval process.