Chrome River Travel & Expense

Business & Group Meals Adding Attendees

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Contents

1.0 Managing Travel Business & Group Meals

Business and Group Meals expense type requires the list of attendees to be included in the expense report. Chrome River allows you to include the option to distinguish internal and external attendees.

1.1 Types of Attendees

Internal Attendees: Those who are U of M Faculty/Staff, and can be entered individually under the **Attendees** section of the expense detail with the label of "Internal".

External Attendees: All other types of Attendees such as students and guests. Searching for external Attendees who are already in the system is the same process described above, with recent Attendees denoted by a clock icon.

1.2 Entering Individual Attendees

To enter individual Attendees, select Internal or External from the drop-down list and then tap the **Add Attendees** field to the right. Recently selected Attendees will be listed at the top. As you begin to type a name into the search bar, a list of all Attendees will appear in the lower half of the screen. Use the scroll bar to navigate through the list, if necessary. Then tap the desired name to select it.

1.3 Add an External Attendee

If the External Attendee is not in the system, select **External** then tap **+ Add Guests** located at the bottom of the search dropdown. Multiple fields will appear to capture the new Attendee's information. You will not be able to tap **Add** until information has been entered into every field.

1.4 Attendee Expense Allocation

The system automatically divides the cost equally among each of the Attendees so that the total amount is 100% allocated. You may manually adjust the per-person percentages or amounts individually to reallocate portions of the expense. 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 do this after all Attendees have been added, since the amounts will redistribute equally as each new Attendee is added.*

2.0 Upload Attendees from CSV file

Using the CSV feature described below will capture their information for future entries.
For large groups of attendees, Chrome River's Attendee Loader feature enables users to upload a list of attendees directly to the report rather than entering each attendee's information by hand. Note that the uploaded file will replace any attendee information already present on the expense.

2.1 Create a CSV

File can contain internal attendee names and any external attendee names, including titles and companies.

- For internal attendees you only need to list the attendee's Chrome River Login name (UUID).

- If no amounts are given, the expense line-item amount will be divided evenly among all attendees. Optionally, you may specify an expense amount for each attendee.

- If expense amounts are entered, then they must total the 'Spent' amount entered.

- Do not put commas in the CSV file; this will cause an Invalid File Format error.

UUID	First Name	Last Name	Title	Company	Amount
kyates1					50.00
sbapat					50.00
	Ace	Hudson	Partner	JSCC	50.00
	Avery	Hensley	Partner	MTSU	50.00

2.2 Upload CSV file

Click the **UPLOAD CSV** button in the Guests area of the expense entry screen and attach the .CSV file. You will be asked to confirm that you want to override any guests already entered on the report.

An error message will alert you if the file is invalid or specific rows need to be corrected.

Your Expense report will look like this

Attendees (4)

| Internal ▼ | Add Guests |

Upload CSV

Internal	×	**Keith Yates** *Manager, Shared Services* *University of Memphis*	25 %	50.00
Internal	×	**Shruti Bapat** *Business Process Analyst* *University of Memphis*	25 %	50.00
External	×	**Ace Hudson** *JSCC*	25 %	50.00
External	×	**Avery Hensley** *MTSU*	25 %	50.00
			100 %	200.00