



# Chrome River Travel & Expense

## Travel Expense Quick Guide

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This Guide will give you the basics needed to use Chrome River Travel & Expense application. Detailed user guides are available in the Chrome River Help Center.

## Launching and Logging into Chrome River

Chrome River is accessible via:

- mymemphis portal, within the Employee Tab
- <https://chromeriver.memphis.edu> with your University of Memphis Single Sign On (SSO)
- Mobile devices

The following are recommended for use in their most recent versions:

- Google Chrome           Version 51.0 or higher
- Safari                     Version 9.1 or higher

## Chrome River Landing Page

Once you have logged into the Chrome River application, you will be presented with the Chrome River Landing Page. You will find the **Navigation Bar** (hamburger menu) at the upper left of the screen, the **Dashboard** to the left, and **UofM logo** to the right.

The screenshot shows the Chrome River application interface. On the left is a navigation bar with a hamburger menu icon and the 'chromeriver' logo. Below it is a dashboard with four main sections: 'eWallet', 'Approvals', 'Expenses', and 'Pre-Approval'. Each section contains summary statistics and links to view more details. On the right side of the page, there are sections for 'CONTACT' (with links for Travel Reimbursement Support, Travel Card Support, and Non-Travel Reimbursement Support), 'NOTICE' (regarding COVID-19 updates), and 'HELP' (with links for UofM Travel Policy, Frequently Asked Questions, and mobile app download instructions). Two blue callout boxes are present: one pointing to the 'Navigation' bar and another pointing to the 'Dashboard' section.

## Direct Deposit Reimbursements

Direct Deposit is the University preferred method for travel reimbursements. If you choose to not

participate in direct deposit payment, you will be notified by email when your check is ready for pick-up in 275 Admin. University or state picture identification will be required for check-pick-up.

## 1.0 Create New Expense Report

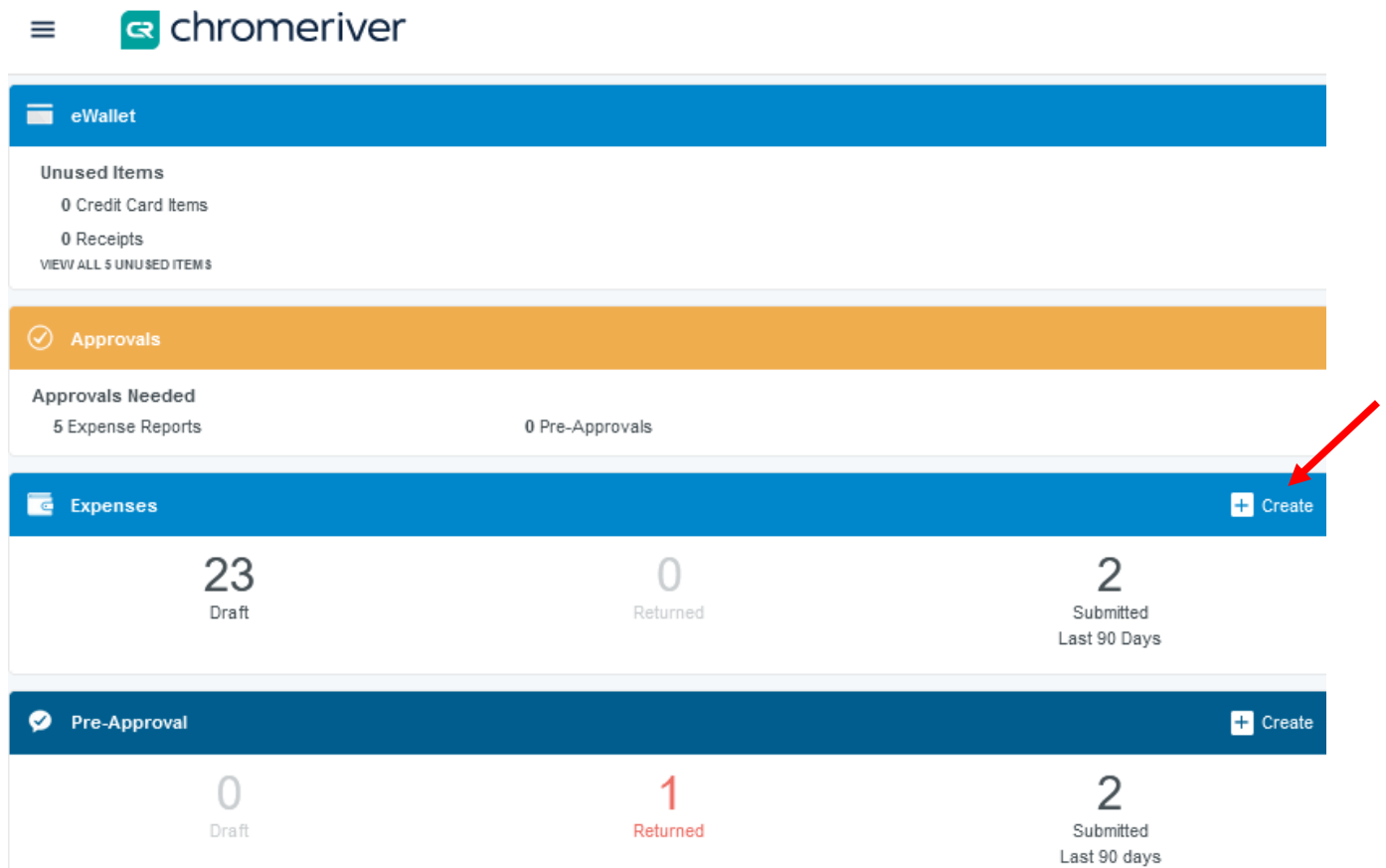
### 1.1 Creating, Submitting and Recalling Reports

Expense reports allow you to group and organize expenses quickly. A new expense report can be created as expenses are incurred for each trip or activity or can be combined into a single report at the end of a trip or activity.

### 1.2 Create New Travel Expense Report Header

The Expense Header section stores basic information that applies to every expense item listed

From the Dashboard, scroll to the **Expenses** section and click on:



The screenshot shows the Chrome River dashboard interface. At the top, there is a navigation bar with a hamburger menu icon and the 'chromeriver' logo. Below this, there are several sections:

- eWallet**: A blue header bar. Below it, 'Unused Items' section shows '0 Credit Card Items' and '0 Receipts' with a link to 'VIEW ALL 5 UNUSED ITEMS'.
- Approvals**: An orange header bar. Below it, 'Approvals Needed' section shows '5 Expense Reports' and '0 Pre-Approvals'.
- Expenses**: A blue header bar with a '+ Create' button on the right. Below it, a summary table shows:

23	0	2
Draft	Returned	Submitted
		Last 90 Days
- Pre-Approval**: A blue header bar with a '+ Create' button on the right. Below it, a summary table shows:

0	1	2
Draft	Returned	Submitted
		Last 90 days

A red arrow points to the '+ Create' button in the Expenses section header.

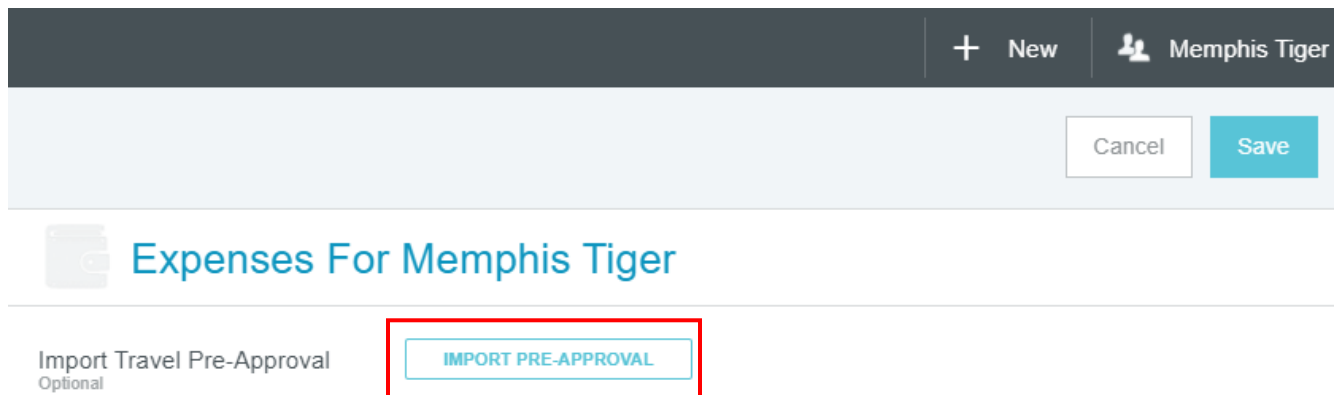
## 2.0 Pre-Approval – Attach/Import

In order to liquidate your encumbered expenses, you must import data from an approved pre-approval. There are two options for importing expense lines. The remaining Pre-Approval balance will also be displayed prior to submitting the expense report.

### 2.1 Option #1 – Import At the Beginning

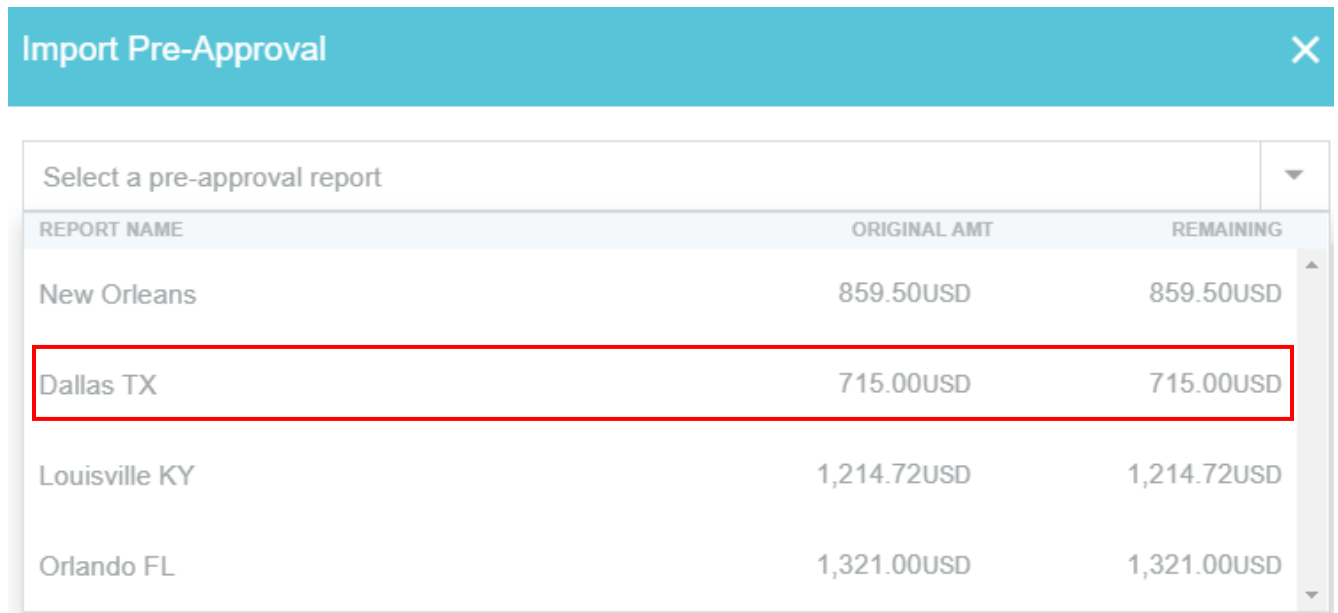
This option will import the header and **ALL** the estimated line items from your Pre-Approval that will need to be itemized, updated or deleted.

2.1.1 Tap the **IMPORT PRE-APPROVAL** button on the expense header.



The screenshot shows the top navigation bar with a '+ New' button and a user profile 'Memphis Tiger'. Below this is a 'Cancel' and 'Save' button area. The main header reads 'Expenses For Memphis Tiger'. Underneath, there is a section for 'Import Travel Pre-Approval' with the sub-label 'Optional'. A button labeled 'IMPORT PRE-APPROVAL' is highlighted with a red rectangular box.

2.1.2 Click 'Select the desired pre-approval report' and select the desired approved pre-approval.



The screenshot shows a dialog box titled 'Import Pre-Approval' with a close button (X) in the top right corner. Below the title bar is a dropdown menu labeled 'Select a pre-approval report'. Below the dropdown is a table with the following data:

REPORT NAME	ORIGINAL AMT	REMAINING
New Orleans	859.50USD	859.50USD
Dallas TX	715.00USD	715.00USD
Louisville KY	1,214.72USD	1,214.72USD
Orlando FL	1,321.00USD	1,321.00USD

The 'Dallas TX' row is highlighted with a red rectangular box.

2.1.3 Click **IMPORT** option bottom right corner, to copy the pre-approval's header data into the Expense Entry screen. Note a list of your estimated items are displayed.

Import Pre-Approval
✕

Dallas TX
▼

### Report Summary

From Date	08/01/2020
To Date	08/03/2020
Business Purpose	athletic

### Expense Summary

	REMAINING (USD)	SPENT (USD)
Airfare	350.00	0.00
Airport Parking	45.00	0.00
Hotel Parking	75.00	0.00
Meals - Per Diem	165.00	0.00
Taxi / Rideshare	80.00	0.00
<b>Total</b>	<b>715.00</b>	<b>0.00</b>















### Allocations

Import

2.1.4 Validate all header information is still correct and make changes if needed. You must enter the **'Destination'** field. Click **SAVE** in the **upper right hand corner** to add **ALL** of the Pre-Approval's line-item detail, reducing the amount of information you must enter manually.

Items noted in **RED** must be edited for receipts or updates. You can adjust amounts at this time.

Note: If you have already submitted an expense report for any of the pre-approval items, you will need to delete those items that have been expensed (example: travel card transactions, airline, registrations fees, hotel)

Expenses For Memphis Tiger					
DATE	EXPENSE	SPENT	PAY ME		
Sat 08/01/2020	 Meals - Per Diem	49.50 USD	49.50		
Sun 08/02/2020	 Meals - Per Diem	66.00 USD	66.00		
Mon 08/03/2020	 Meals - Per Diem	49.50 USD	49.50		
Mon 08/03/2020	 Airfare	350.00 USD	350.00		
Mon 08/03/2020	 Hotel - Parking	75.00 USD	75.00		
Mon 08/03/2020	 Airport Parking	45.00 USD	45.00		
Mon 08/03/2020	 Taxi / Rideshare	80.00 USD	80.00		

## 2.2 Option #2 – Attach Pre-Approval after create Expense report

This option will **ONLY** import line items from your Pre-Approval that link to your itemized expense items, eliminating the need to delete un-used estimated expenses.

Create your Expense Header (Section 1.2) and manually added all your expense items, submit your report for confirmation. Click the **Pre-Approval** button.

**NOTE:** Blanket pre-approvals should be imported using this option.

**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.

**2.2.1** Select the desired pre-approval from the list of approved pre-approvals. This will add those items you listed on your Pre-Approval.

**Import Pre-Approval** ✕

REPORT NAME	ORIGINAL AMT	REMAINING
New Orleans	859.50USD	859.50USD
Dallas TX	715.00USD	715.00USD
Louisville KY	1,214.72USD	1,214.72USD
Orlando FL	1,321.00USD	1,321.00USD

**2.2.2** Validate if you missed any items that were identified on your pre-approval. You can cancel by clicking on the 'X' in the upper right hand corner and add any missed items with a 0.00 amount. Click **APPLY** to attach the Pre-Approval and generate an encumbrance record.



Apply Pre-Approval
×

New Orleans
▼

### Report Summary

From Date	07/27/2020
To Date	07/31/2020
Business Purpose	Athletic

### Expense Summary

	REMAINING (USD)	SPENT (USD)
Airfare	400.00	385.98
Baggage Fee	60.00	0.00
Meals - Per Diem	319.50	248.50
Taxi / Rideshare	80.00	70.00
<b>Total</b>	<b>859.50</b>	<b>704.48</b>

### Allocations

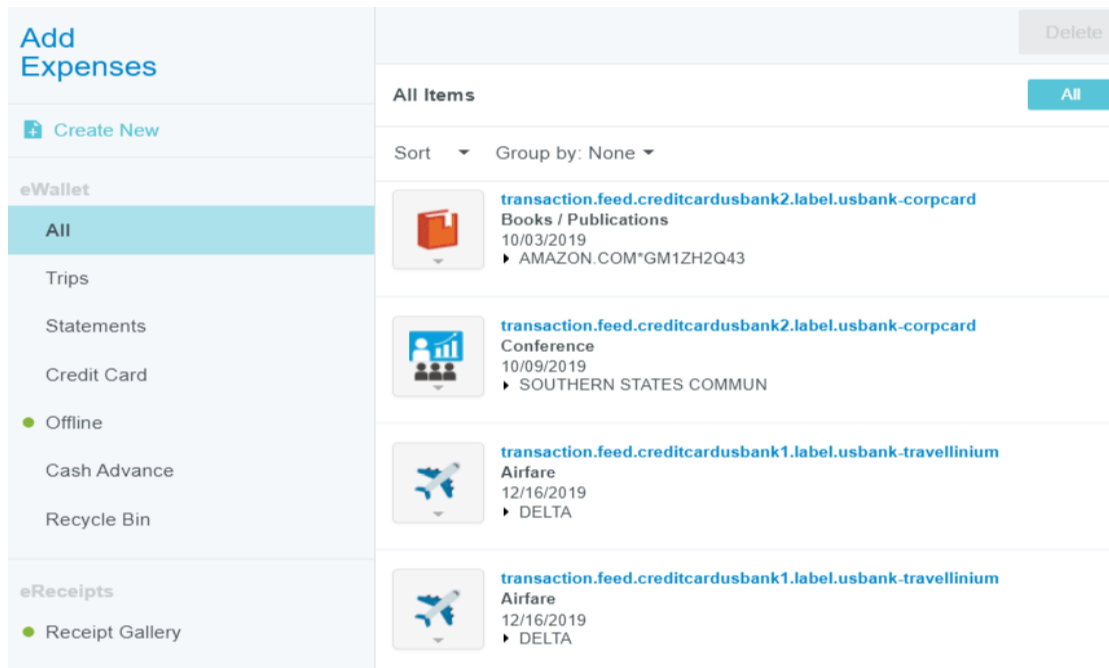
Apply

### 2.2.3 Continue to Section 3.0 Viewing eWallet Travel Card Transactions & Receipts Gallery

## 3.0 Viewing eWallet Travel Card Transactions & Receipts Gallery

The Add Expenses screen will open on the right. It offers you several types of expenses in the eWallet, including travel card transactions, emailed and uploaded receipts in your Receipt Gallery.

The green dot next to an expense category in the E-Wallet or the Receipt Gallery indicates that there are unused items or receipts available.



The screenshot shows the 'Add Expenses' interface. On the left is a sidebar with categories: 'eWallet' (All, Trips, Statements, Credit Card, Offline, Cash Advance, Recycle Bin) and 'eReceipts' (Receipt Gallery). The main area shows a list of transactions under the 'All' category. The list includes:

- transaction.feed.creditcardusbank2.label.usbank-corporcard**: Books / Publications, 10/03/2019, AMAZON.COM\*GM1ZH2Q43
- transaction.feed.creditcardusbank2.label.usbank-corporcard**: Conference, 10/09/2019, SOUTHERN STATES COMMUN
- transaction.feed.creditcardusbank1.label.usbank-travellinium**: Airfare, 12/16/2019, DELTA
- transaction.feed.creditcardusbank1.label.usbank-travellinium**: Airfare, 12/16/2019, DELTA

## 3.1 Adding a Travel Card Expense to a Report

Your UofM Travel Card expenses and ATM withdrawals are located in your eWallet under the 'All' heading. Please note it can take up to 72 hours before charges appear.

Click the check box to select one or more card expenses and click **Add** to add them to the report. You will be prompted to fill in any required fields for each expense, attach a receipt and click **'Save'**.

## Add Expenses

[Create New](#)

eWallet

- All
- Trips
- Statements
- Credit Card
- Offline
- Cash Advance

Delete Add

All Items All Merged

Sort ▼ Group by: None ▼ 1 □

10/09/2019  
AMAZON.COM\*GM1ZH2Q43 USD

[transaction.feed.creditcardusbank2.label.usbank-corporcard](#)

Conference  
10/09/2019  
SOUTHERN STATES COMMUN 475.00 USD

[transaction.feed.creditcardusbank1.label.usbank-travellinium](#)

Airfare  
12/11/2019  
DELTA 389.98 USD

←
Expenses For Memphis Tiger
☰
⊕

### Dallas TX ⓘ

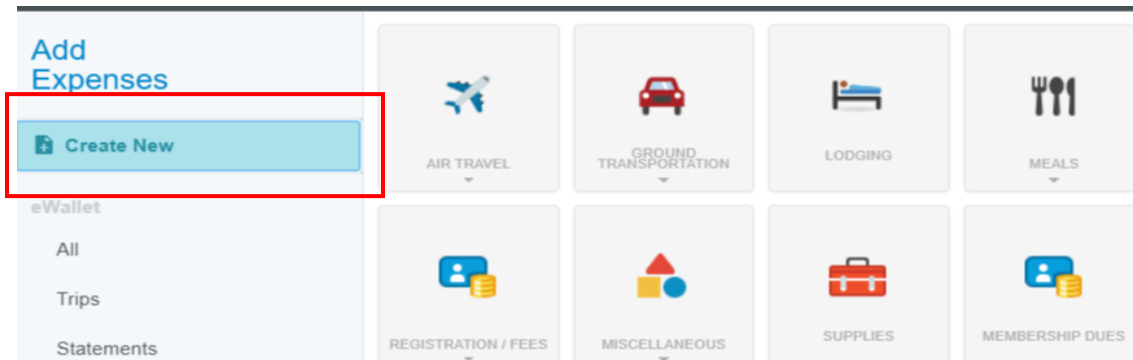
0 Comments 1 Attachments

DATE	EXPENSE	SPENT	PAY ME			
Wed 12/11/2019	Airfare	389.98 USD	0.00			
Sat 08/01/2020	Meals - Per Diem	49.50 USD	49.50			
Sun 08/02/2020	Meals - Per Diem	66.00 USD	66.00			
Mon 08/03/2020	Hotel - Parking	75.00 USD	75.00			
Mon 08/03/2020	Taxi / Rideshare	80.00 USD	80.00			
Mon 08/03/2020	Airport Parking	45.00 USD	45.00			
Mon 08/03/2020	Meals - Per Diem	49.50 USD	49.50			
Mon 08/03/2020	Airfare	350.00 USD	350.00			

Note: If an imported pre-approval item has been paid via travel card (pay me 0.00) , you must delete the pre-approval line item from your expense report, it is non-reimbursable.

## 4.0 Create Travel Expenses

Tap 'Create New' to display all the expense category tiles. Tap a tile to display its subcategories and select the appropriate expense type. Tap it again to hide the subcategories. You will be prompted to fill in required fields for each expense and attach a receipt.



## 5.0 Airline Tickets

Airline tickets purchased via your University Travel Card must be expensed within **30 days** from the date the transaction post to your eWallet.

### 5.1 Non-Reimbursable charges

If you purchased any upgrade charges that your manager does not approve, you must identify those at the time you expense the travel card transaction. Your PayME amount will indicate a negative amount until you settle your personal item.

- Complete the '**Travel Card Reimbursement to UofM**' form
- Take the form and your method of payment to the University Student Business Services office located in Wilder Tower and obtain a paid receipt
- Add to your expense report '**Amount Owed to UofM**' expense tile and identify the amount of the personal charge
- Add to your expense report '**Amount Paid UofM**' expense tile and enter the amount paid on your receipt as a negative number
- Attachment of the paid receipt is required

←
Expenses For Carol Laney
☰
+

## 2020 NCCI Atlanta

0 Comments
2 Attachments
i

DATE	EXPENSE	SPENT	PAY ME	
Fri 11/15/2019	Airfare	130.21 USD	0.00	
Fri 11/15/2019	Amount Owed To UofM	20.00 USD	20.00	
Fri 11/15/2019	Amount Paid UofM	-20.00 USD	-20.00	

Expense Report  
010021054798

Total Pay Me Amount  
**0.00** USD

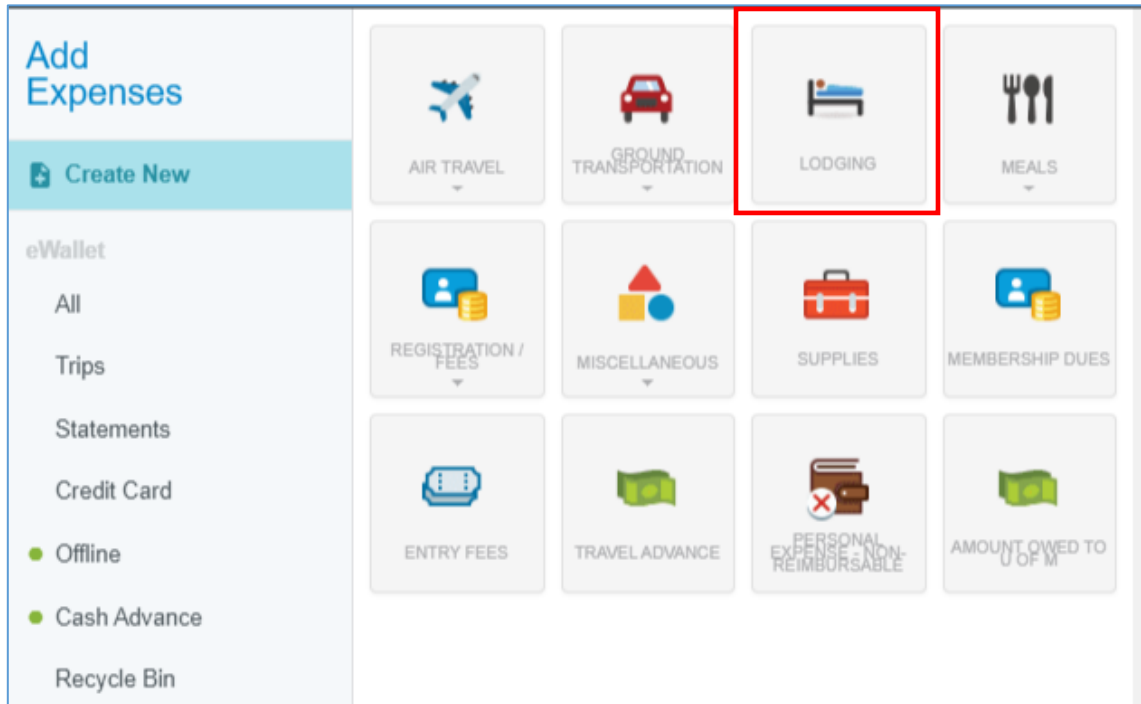
Submit

## 6.0 Lodging Itemization

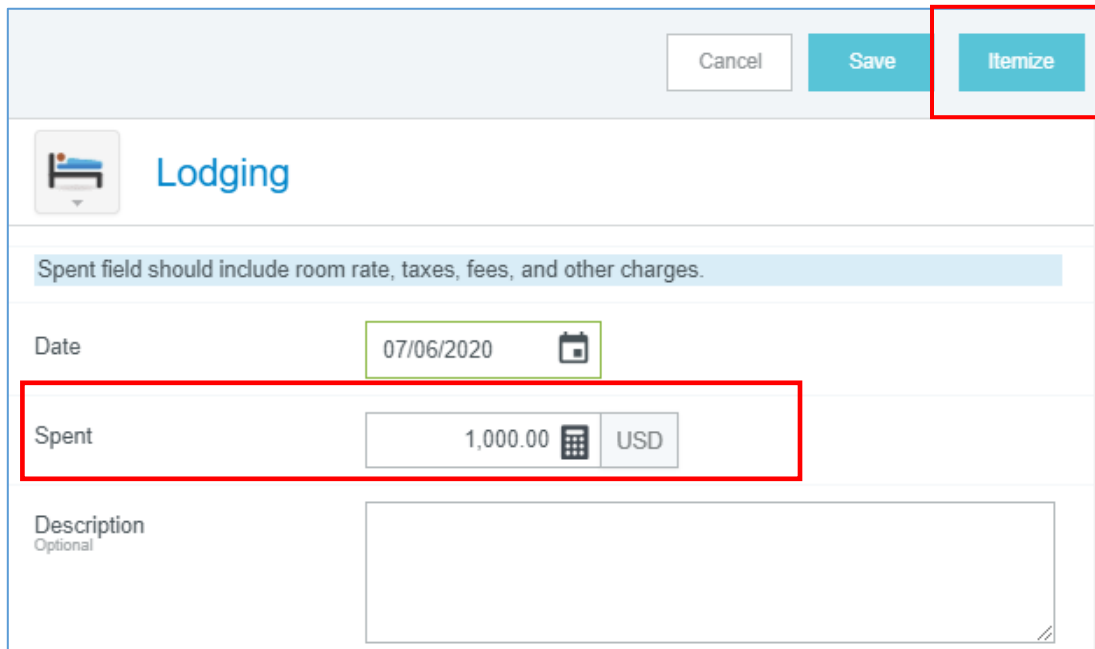
In addition to room charges, lodging bills usually include charges for meals and other expenses related to your stay. To make the process of recording these charges quick and simple, travelers will itemize these charges within the Lodging expense tile.

### 6.1 Adding Lodging Expenses

To add Lodging expenses, click on the **Lodging** tile.



Enter the **total** amount of the lodging bill (including room rate, taxes/fees, and any other expenses) in the spent field and tap **Itemize**.




## 6.2 Itemizing Lodging


The **Total Amount** of the bill appears in black in the upper right-hand corner of the screen. The **Amount Remaining** to be itemized appears in red.


To add the cost of the lodging nightly rate, tap **Room** and enter the amount in the **Spent** field. Do not include any other incurred expenses (e.g. Taxes, fees).


Add Itemization
Done



Lodging


TOTAL AMOUNT	REMAINING
0.00	0.00

  
ROOM


  
TAXES & FEES

  
HOTEL - INTERNET / WIFI

  
HOTEL - PARKING


  
HOTEL - OTHER PERSONAL EXPENSE

Cancel
Save


Room


TOTAL AMOUNT	REMAINING
1,000.00	1,000.00

Date

07/06/2020


Total room charge excluding taxes, fees, and other charges.


Spent

825.00


USD

Click on **Calculate** next to the Allowable Total field to open the Calculate Allowable Total page to determine the per diem rate based on the standard government rate (e.g. CONUS).

Allowable total must be calculated to determine per diem rate.

Allowable Total	0.00	USD	Calculate 
Business Purpose	documentation		
Description <small>Optional</small>			

Enter your travel start date, travel end date, location and number of rooms to generate the Average Daily Room Rate and **Allowable** total. Click **Save** to return to the Lodging form.


### Calculate Allowable Total


Start Date	07/03/2020
End Date	07/06/2020
Location	San Diego-San Diego County, California (CA), United States
Rooms	1
Nights	3
Average Daily Room Rate	173.00 USD
Base Total	519.00 USD
Allowable Total	519.00 USD



**Note** if your room rate is more than 25% of the allowable total, you will be required to enter an explanation.

Images
Edit Itemize ...


Room


 Spent Amount is > 25% of Allowable
#250

Spent Amount is > 25% of Allowable


**Continue** itemizing your lodging line items.

As you save lodging expenses, the red **Remaining** total will update to reflect how much remains to be itemized. When the expense has been fully itemized, the **Remaining** total will turn gray with a zero remaining.

Images
Edit Itemize ...

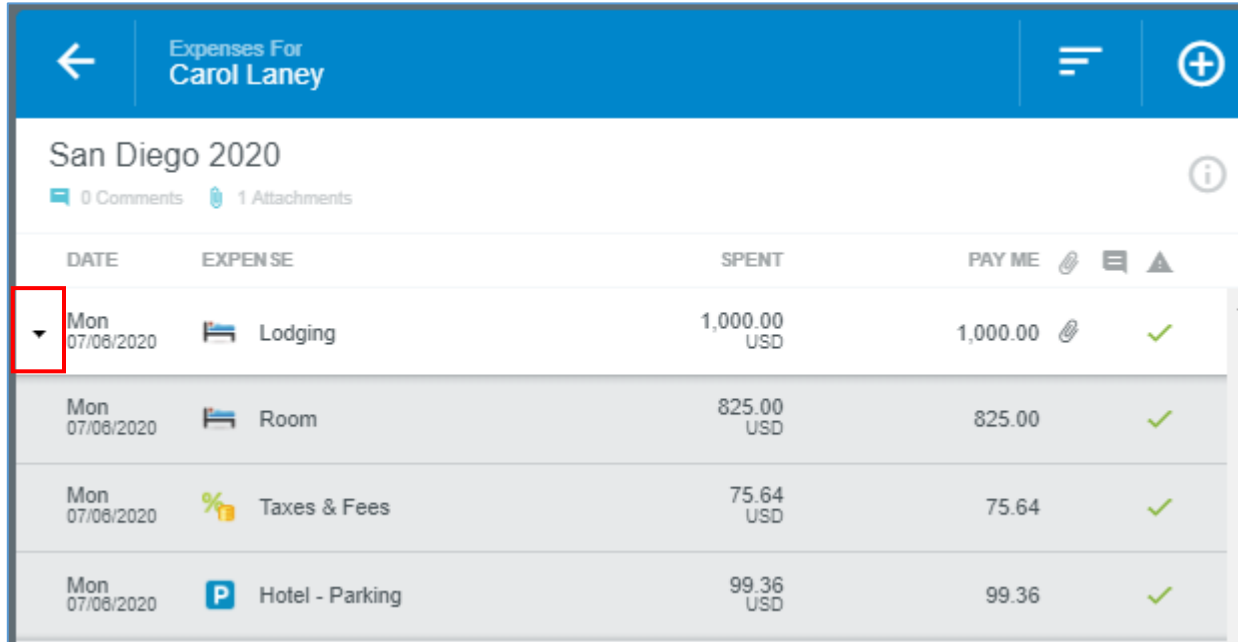


TOTAL AMOUNT	REMAINING
1,000.00	0.00


Hotel - Parking

Date	07/06/2020
Spent	99.36 USD
Business Purpose	documentation

To display a list of the itemized lodging details on the header, click on the black triangle to the left of the date. The window will expand to show all your itemized items.



DATE	EXPENSE	SPENT	PAY ME
Mon 07/06/2020	Lodging	1,000.00 USD	1,000.00
Mon 07/06/2020	Room	825.00 USD	825.00
Mon 07/06/2020	Taxes & Fees	75.64 USD	75.64
Mon 07/06/2020	Hotel - Parking	99.36 USD	99.36

### 6.3 Personal Items Charged to Lodging Folio

It is a violation of the Travel Card Policy to use your University Travel Card for any personal non-business items. Before you can complete and submit your expense report for reimbursement you must follow these procedures:

- Identify the personal item charged on your lodging invoice by selecting the **'Hotel-Other/Personal Expense'** tile
- Complete the **'Travel Card Reimbursement to UofM'** form
- Take the form and your method of payment to the University Student Business Services office located in Wilder Tower and obtain a paid receipt
- Add to your expense report **'Amount Paid UofM'** expense tile and enter the amount paid on your receipt as a negative number
- Attachment of the paid receipt is required

Expenses For Carol Laney					
Nasvhille SACRAO 2020				0 Comments	2 Attachments
DATE	EXPENSE	SPENT	PAY ME		
Fri 10/11/2019	Lodging	134.45 USD	0.00		✓
Fri 10/11/2019	Room	96.00 USD	0.00		✓
Fri 10/11/2019	Taxes & Fees	30.45 USD	0.00		✓
Fri 10/11/2019	Hotel - Other/Personal Ex...	8.00 USD	0.00		✓
Fri 10/11/2019	Amount Owed To UofM	8.00 USD	8.00		✓
Fri 10/11/2019	Amount Paid UofM	-8.00 USD	-8.00		✓
Expense Report 010021057705		Total Pay Me Amount <b>0.00</b> USD		Submit	

## 7.0 Allocation

Select the appropriate Department/Index number for your expense charges.

### 7.1 Split Allocations

To allocate the expense, enter the Index or Description in the allocation field. As you type, a drop-down list of matching items will be displayed for selection. If the expense is being charged to multiple indexes, click Add Allocations and select the appropriate Indexes

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%.

**Allocation**

Split Equally
Clear Splits

<span style="color: red;">×</span> 113110 General Accounting IDCR Federal State Local Private	50 %	225.00	◀
<span style="color: red;">×</span> "228047 College of Engineering CS TLSAMP Phase IV	50 %	225.00	◀
100 %		450.00	

+ Add Allocation

## 8.0 Attach Images/Receipts

You can attach images to an expense while you are creating it or after it has been created. Images may be uploaded as an attachment from your computer, emailed to Chrome River (receipt@ca1.chromeriver.com) or added via Chrome River SNAP. For a complete list of receipt submission methods, see the 'Managing Expense Receipts' guide.

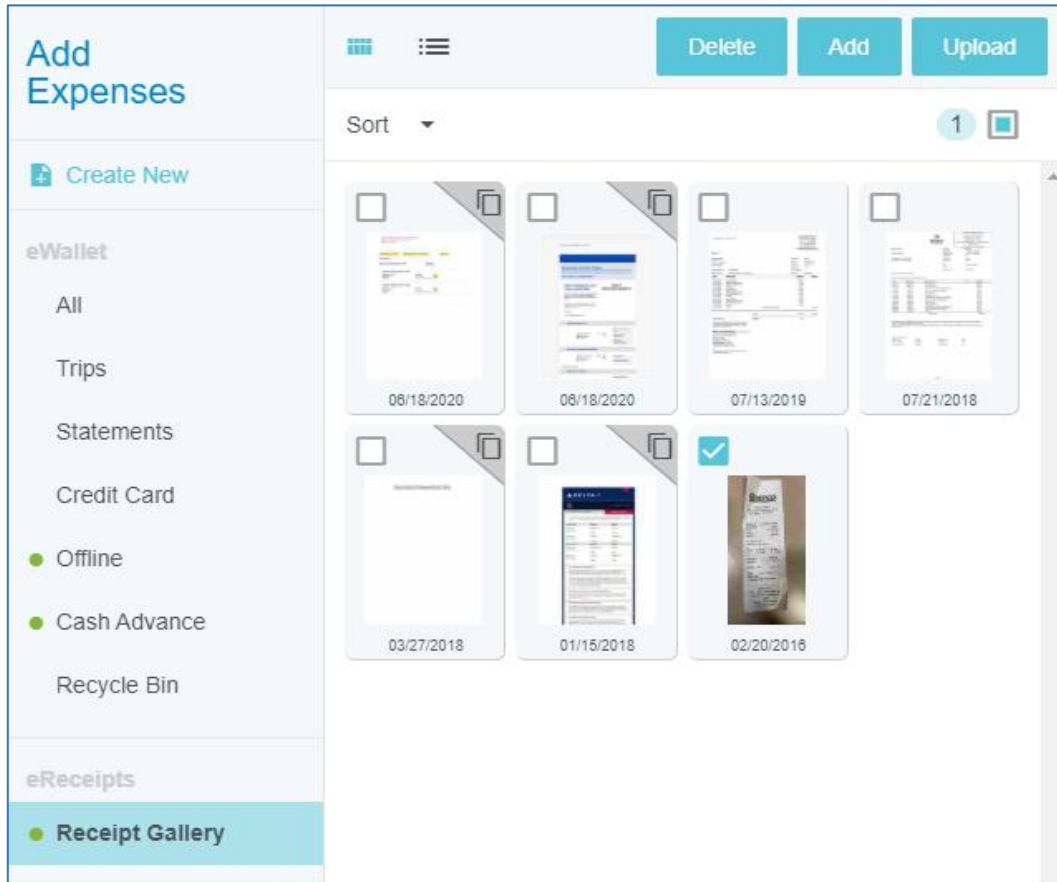
To add a receipt image to the expense line, scrolling to the **Attachments** section, and tapping **Add Attachments**.

**Attachments (0)** 🔍 🗨

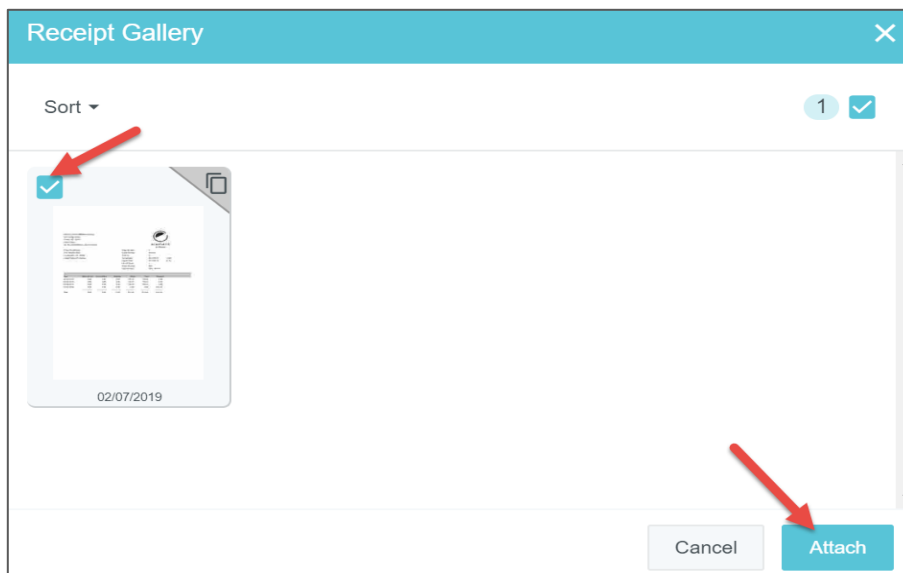
Drag image here to upload
Add Attachments ▼

- 📎 From Receipt Gallery
- 📁 Upload Attachments

**From Receipt Gallery:** Receipt images uploaded from your computer or sent via email or CR Snap App will appear in the Receipt Gallery, where they can be added to an existing report by selecting them.



Select the correct receipt image and click **Open**. The selected receipt will be attached to the expense line. If you choose to upload PDF receipts, the maximum size for a single upload is 5 MB.



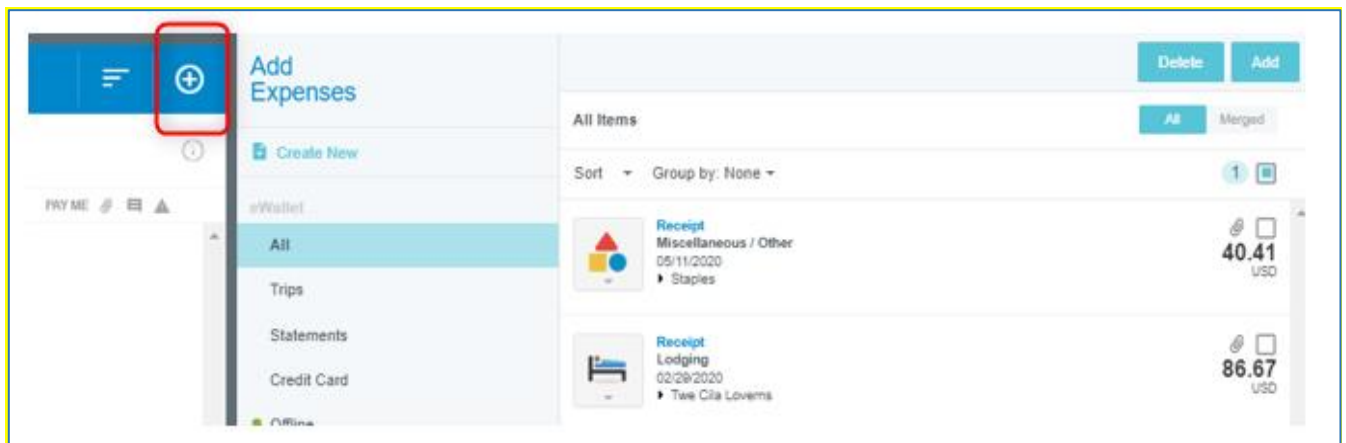
**Upload Attachments:** If you have saved receipts to your computer, when you select this option a window will open for you to search for the appropriate receipt. Select the receipt and open or double click to be added to the expense item.

**Delete Receipt:** If you selected the wrong receipt, click on the receipt to open in a new window and click on the 'paper clip' in upper left hand corner.



## 9.0 Continue Adding Expenses

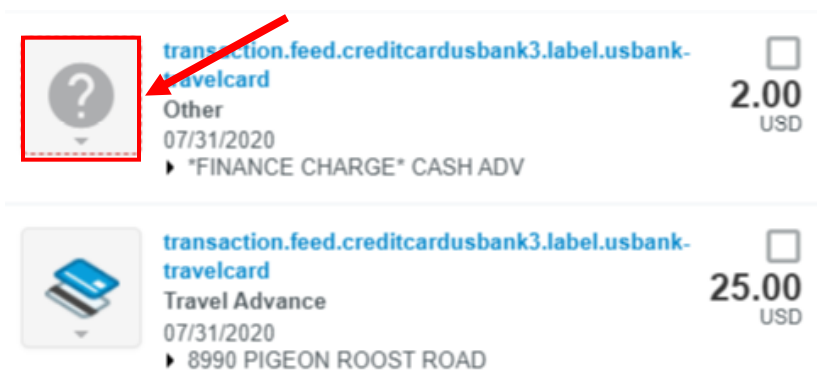
Click on the "+" symbol at any time to bring the **Add Expenses** options back into view.



## 10.0 Travel Advance

### 10.1 Travel Advance – ATM Withdrawals

Travel advances will be posted to your eWallet, along with the US Bank Finance Charge. You must attach the **ATM** receipt to each Travel Advance line item. Also the approved '**Faculty/Staff Travel Advance Request**' form must be attached.









The USBank finance charge in your eWallet will be identified with a tile and noted as ‘Other’. You will need to change the expense type from ‘Other’ to ‘Travel Advance’. To do this click on the ? tile and all expense tiles will be displayed. Click on ‘Travel Advance’ tile to reassign.

## 10.2 Travel Advance Applied

A travel advance applied tile is **required** in order to reconcile the bank transactions. Your total reimbursement due will be reduced by entering the amount of your travel advance as a **negative** amount.

0 Comments 4 Attachments

DATE	EXPENSE	SPENT	PAY ME
Tue 06/02/2020	 Travel Advance	23.50 USD	0.00 
Tue 06/02/2020	 Travel Advance	2.00 USD	0.00 
Tue 06/02/2020	 Travel Advance Applied	-25.50 USD	-25.50 

Expense Report 010021053639	Total Pay Me Amount <b>188.00</b> USD	<input type="button" value="Submit"/>
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## 11.0 Lodging Folio (invoice) Personal Charges

It is a violation of the Travel Card Policy to use your University Travel Card for any personal non-business items. These charges will not be deducted from your ‘Owed’ amount. Before you can complete and submit your expense report for reimbursement you must follow these procedures:

- Identify the personal item charged on your lodging invoice by selecting the ‘Hotel-Other/Personal Expense’ tile
- Complete the ‘**Travel Card Reimbursement**’ form found on the BF forms webpage.
- Take the form and your method of payment to the University Student Business Services office located in Wilder Tower and obtain a paid receipt
- Add to your expense report ‘**Amount Owed to UofM**’ expense tile and identify the amount of the personal charge
- Add to your expense report ‘**Amount Paid UofM**’ expense tile and enter the amount paid on your receipt as a negative number
- Attachment of the paid receipt is required

←
☰
+

### Expenses For Carol Laney

#### Nasvhille SACRAO 2020

0 Comments 2 Attachments

DATE	EXPENSE	SPENT	PAY ME	📎	💬	⚠️
Fri 10/11/2019	Lodging	134.45 USD	0.00	📎		✓
Fri 10/11/2019	Room	96.00 USD	0.00			✓
Fri 10/11/2019	Taxes & Fees	30.45 USD	0.00			✓
Fri 10/11/2019	Hotel - Other/Personal Ex...	8.00 USD	0.00			✓
Fri 10/11/2019	Amount Owed To UofM	8.00 USD	8.00			✓
Fri 10/11/2019	Amount Paid UofM	-8.00 USD	-8.00	📎		✓

Expense Report 010021054798	Total Pay Me Amount <b>0.00</b> USD	<span style="background-color: #70ad47; color: white; padding: 5px 15px; border-radius: 3px;">Submit</span>
--------------------------------	--	---

## 12. Compliance Warning and Violation Messages

After saving an expense, you can see the status of the expense in the status column. If the status icon is a green checkmark, then the expense is all set and requires no further action until submission


Sometimes, you may see an orange or red icon in the status column. This indicates that the expense has failed a compliance rule and requires additional actions before proceeding. Chrome River enables us to build in policy Compliance Rules to ensure expense reports are within policy.

- An orange icon indicates a compliance warning



A compliance warning indicates that additional information is required before the expense can be submitted for approval and processing. Click on the orange warning symbol and either modify the data or enter a reply. Then click **Save** to proceed.

- A red icon indicates a compliance violation  
A compliance violation indicates that the expense cannot be submitted for approval and payment based on the University's policies as defined in the system. To clear the violation, select the expense line, make any required changes, and click **Save** to proceed.



## Meals - Per Diem

**⚠ Expense Date Compliance** #221

Future dates are not allowed. Please correct prior to proceeding.

**⚠ Possible duplicate entry** #205

Please confirm this is not a duplicate entry. Check based on Expense Owner, Expense Type, Date and Amount. Please provide a confirmation.

### 13. Close or Submit

When you are done adding expenses to a draft report, you may tap the Back Arrow in the upper left-hand corner to close the report and save it in Draft Expense Reports for later.

If the report is ready to be submitted for approval, tap the green **Submit** button.

←
☰
⊕
Expenses For  
Drisya Vijay

### Per Diem Pre Approval

0 Comments   1 Attachments

DATE	EXPENSE	SPENT	PAY ME
Thu 04/23/2020	✈️ Airfare	450.00 USD	450.00

Expense Report 010020720218	Total Pay Me Amount <b>450.00</b> USD	Submit
--------------------------------	--	--------

You will be asked to confirm that your expenses are correct and for legitimate business purposes. When you tap **Submit**, the expense report will be routed for approval based on the routing rules in Chrome River.

You can access the submitted report from the **Submitted Last 90 Days** tab on you Chrome River dashboard.

**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
Pre-Approval
Submit

---

### Per Diem Pre Approval

Report Owner	Drisya Vijay <i>Acquis</i>
Expense Report ID	010020720218
Business Purpose	Testing

---

#### Financial Summary

	AMOUNT (USD)	APPROVED (USD)
Total Expense Reported	450.00	0.00
Amount Due Employee	450.00	0.00

---

#### Expense Summary

	AMOUNT (USD)	APPROVED (USD)
Airfare	450.00	0.00
<b>Total</b>	<b>450.00</b>	<b>0.00</b>

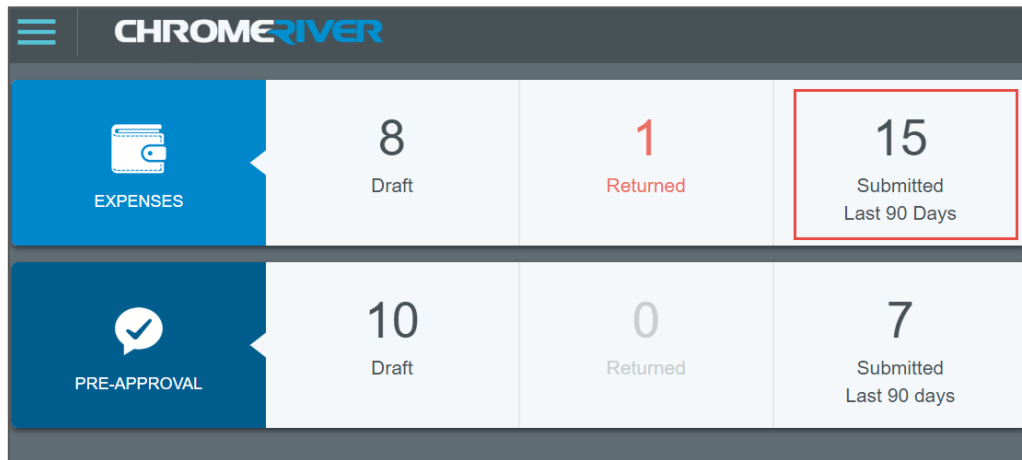
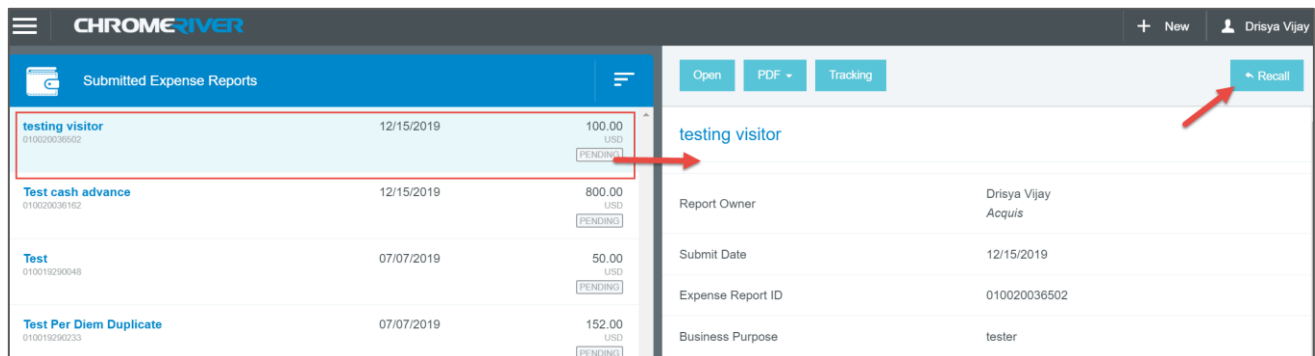
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#### Account Summary

		AMOUNT (USD)	APPROVED (USD)
"228047	College of Engineering CS TLSAMP Phase IV	225.00	0.00
113110	General Accounting IDCR Federal State Local Private	225.00	0.00
<b>Totals</b>		<b>450.00</b>	<b>0.00</b>

## 14. Recalling a Report

To recall a submitted report, navigate to Submitted Last 90 Days tab on you Chrome River homepage and select the report. The right side will display the report details. Tap the Recall button in the top right. Tap Yes to confirm you want the report moved to the draft list. Once a report has been approved, it cannot be recalled.

Report Title	Date	Amount	Status
testing visitor	12/15/2019	100.00 USD	PENDING
Test cash advance	12/15/2019	800.00 USD	PENDING
Test	07/07/2019	50.00 USD	PENDING
Test Per Diem Duplicate	07/07/2019	152.00 USD	PENDING

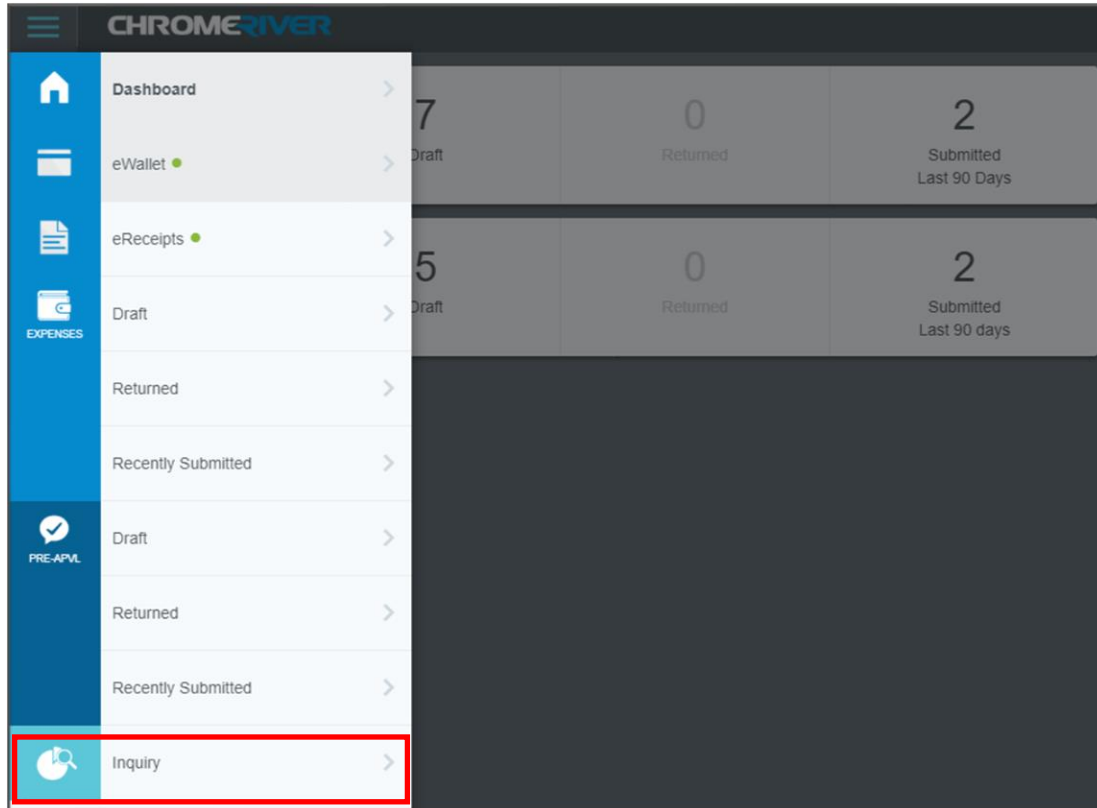
  

Field	Value
Report Owner	Drisya Vijay Acquis
Submit Date	12/15/2019
Expense Report ID	010020036502
Business Purpose	tester

## 15. Inquiry Reports

The Inquiry Dashboard allows you and your delegates to perform quick inquiries on all your activity by category. These include expense reports, expense items, delegates, calendar, credit card items, approvals, and paid expenses.

To access inquiry reports, tap the **Menu** button in the upper left corner and then tap **Inquiry**.



You will see a list of inquiry reports, grouped by application - **Expense**, based on the activity in each category and allow you to quickly find specific information.

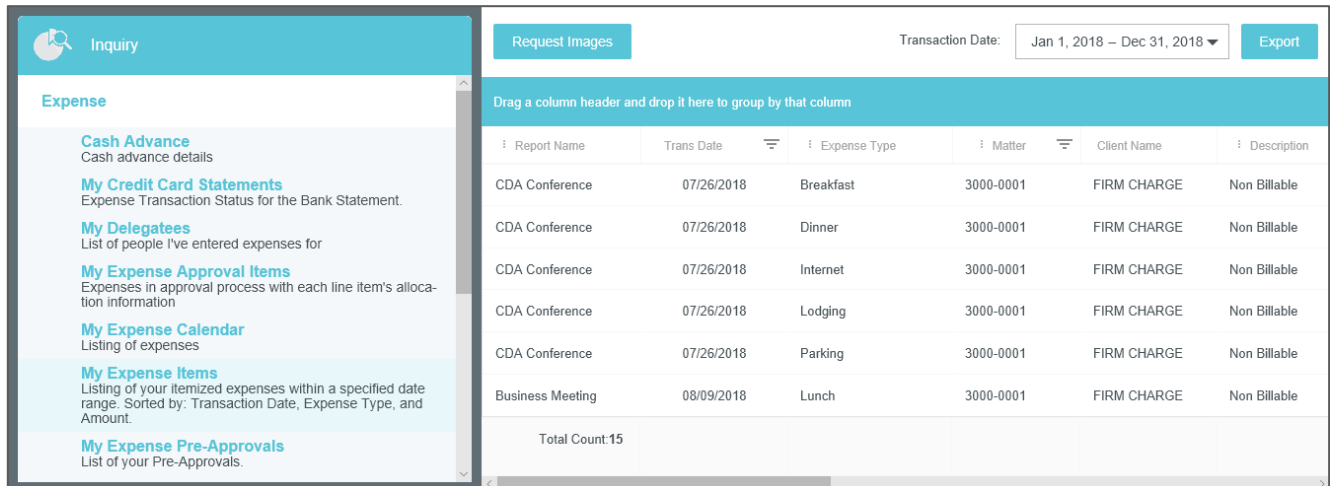


## 15.1 List of Report Available:

REPORT NAME	DESCRIPTION
<b>My Expense Reports</b>	List of expense reports created within a specified date range
<b>My Expense Items</b>	List of itemized expenses within a specified date range
<b>My Delegates</b>	List of people you have entered unsubmitted expenses for
<b>My Expense Calendar</b>	List of expenses shown in a calendar view
<b>My Items</b>	List of itemized expenses that were created from offline transactions, cash advances, emailed receipts, mobile transactions and credit card transactions
<b>My Firm-Paid Items</b>	Itemized list of expense transactions that are paid for by the university
<b>My Expense Approvals</b>	Expense items that have been or are your responsibility to approve
<b>My Paid Expenses</b>	List of expenses that have been paid
<b>My Expense Pre-Approvals</b>	Lists all your pre-approvals
<b>My Pre-Approval Approvals</b>	Lists all pre-approvals assigned to an approver in every stage of the approval process: approved, returned and awaiting approval

## 15.2 Run Report

Simply tap a report in the list to run it. The results will appear in the pane on the right on larger devices or replace the report list on smaller devices. Drag the slider bar at the bottom to see columns that don't fit on the screen.



The screenshot shows the 'Inquiry' screen with a sidebar on the left containing a list of reports: Cash Advance, My Credit Card Statements, My Delegates, My Expense Approval Items, My Expense Calendar, My Expense Items, and My Expense Pre-Approvals. The main area displays a table of expense items for the date range Jan 1, 2018 – Dec 31, 2018. The table has columns for Report Name, Trans Date, Expense Type, Matter, Client Name, and Description. The items listed are all 'FIRM CHARGE' and 'Non Billable'.

Report Name	Trans Date	Expense Type	Matter	Client Name	Description
CDA Conference	07/26/2018	Breakfast	3000-0001	FIRM CHARGE	Non Billable
CDA Conference	07/26/2018	Dinner	3000-0001	FIRM CHARGE	Non Billable
CDA Conference	07/26/2018	Internet	3000-0001	FIRM CHARGE	Non Billable
CDA Conference	07/26/2018	Lodging	3000-0001	FIRM CHARGE	Non Billable
CDA Conference	07/26/2018	Parking	3000-0001	FIRM CHARGE	Non Billable
Business Meeting	08/09/2018	Lunch	3000-0001	FIRM CHARGE	Non Billable

Total Count: 15