CHROME RIVER GETTING STARTED

Chrome River Glossary

- **Allocation:** Index(es) that will be Charged for Expenses
- **Alternate Email Address:** Additional Email address(es) you will use to send images to Chrome River
- **Approval Delegate:** Temporarily approve expenses and pre-approvals for another user for a specified period of time—for example, when he or she is on vacation—via email. You will not be able to access the user's Approval screen
- **Business Purpose:** Business-Related Reason for the Expenditure
- **Compliance Rules:** Guidelines Based on NJIT's Policies and Procedures
- **Dashboard:** Snap Shot of your Approval, Pre-Approval Report, and Expense Report Activity
- **Delegate:** Create expense reports for another user and access his or her Settings menu, Home Screen and Inquiry Reports. You will receive copies of any e-mail notifications regarding approval, rejection or adjustment of reports created for the user. However, you will not be able to approve expenses that are routed to the user
- **E-Wallet:** Imported Transactions Via Feed. Ex. (Travel Agency, University Credit Card)
- **Mosaic:** Selection of Expense Type Tiles
- **Pre-Approval:** A Pre-Approval Report (formerly known as Pre-Authorization) is required for both "Domestic" and "International" report types. In an effort to streamline processes, the "Request for Attendance at Events Form" if, required is incorporated within the Pre-Approval Report
- **Recall:** Allows you to Make Changes to Reports that were Submitted for Approval but haven't been Approved
- **Receipt Gallery:** Emailed and Uploaded Images
- **Report Name:** This is the name assigned by the expense creator, which is used in tracking and inquiry to help identify expenses. If a name is not entered, the default name will be "Expenses on [Date] [Time]."
- **Report Type:** Type of Travel
- **Single Sign On (SSO):** Allows you to Use One Set of Login Credentials to Access a Number of Different Applications (i.e. NJIT's Highlander Pipeline)
- **Tiles:** Expense Categories
- **Tiles w/Down Arrow:** Expenses with Subcategories
- **Tracking**: Displays Where your Pre-Approval and Expense Reports are in the Approval Process
- **Violation:** Compliance Rule that Must be Addressed Before you can Submit your Expense Report
- **Warning:** Compliance Rule that Allows you to Add an Explanation in Order to Submit your Expense Report
- **Welcome Notice:** Home Page with University Notices/Updates, Quick Start Videos/Guides, FAQ's and Contact Information

Logging in and Navigating in Chrome River

Log In Via Single Sign On

1. Log onto Highlander Pipeline
2. Select the Faculty/Staff Services Tab
3. Select Chrome River under Finance Services

When logging into Chrome River, depending on the size of your screen you will see the Welcome Notice on your right and your Dashboard on the left or you may have to toggle between the two.

Navigation in Chrome River

Navigation Bar

The Navigation Bar remains at the top of your screen no matter where you are in the application. Depending on the size of your screen, it may display text or just icons.

Navigation

Tap the **MENU** button at the far left to navigate among the different Chrome River modules and go directly to the desired function in each.

A menu will slide in from the left. If you have items that need approval, these will appear at the top. Below them you can access your expenses, pre-approvals and the inquiry feature.

HOME

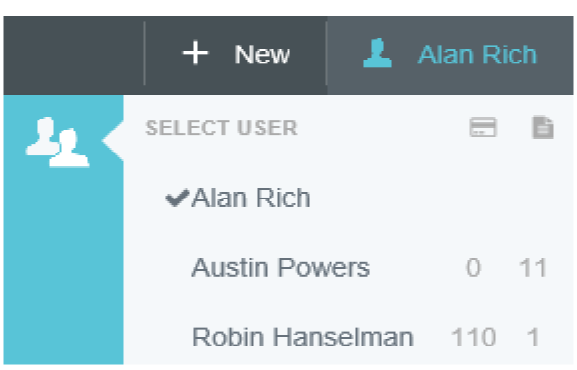
Tap the **Chrome River Logo** button in the Navigation Bar to return to the Dashboard at any time.

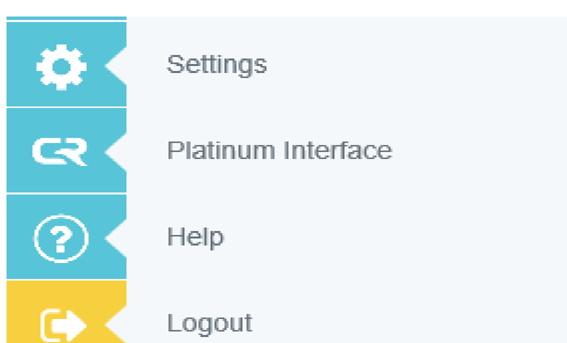
+ NEW

Depending on the size of your screen, you can tap the **+** or **+ NEW** button to create a New Pre-Approval Report and New Expense Report no matter where you are in the application.

USER

Depending on the size of your screen, you can tap the **User** icon or **your User Name** in the right corner of the Navigation Bar to choose or act as a delegate, edit your settings, access the Chrome River Help Center, or log out of the application

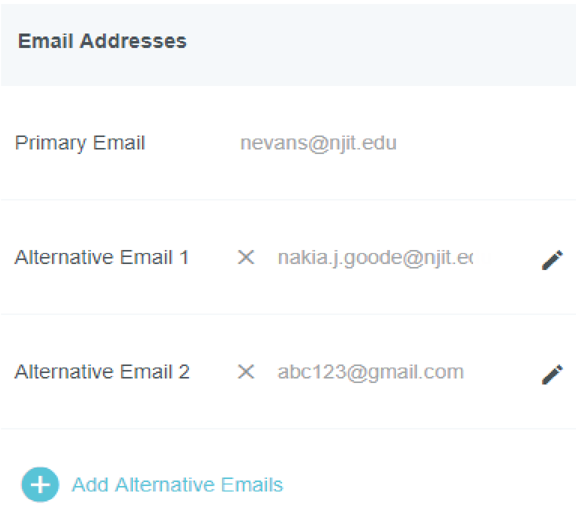




User Profile Settings

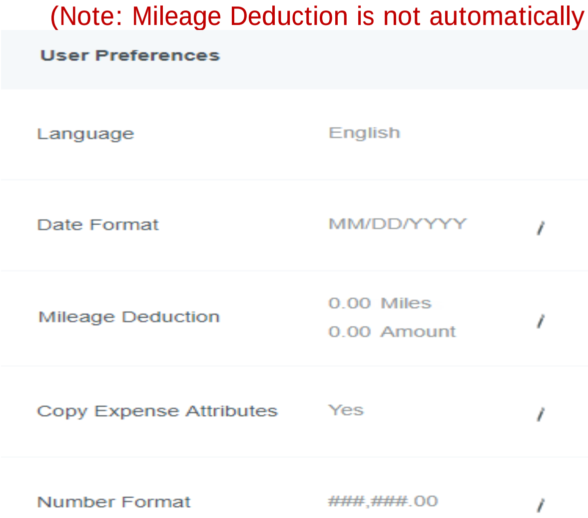
Personal Settings

- Add additional email addresses
- The “From” email address used to send images and approve invoices must be one associated with your Chrome River account



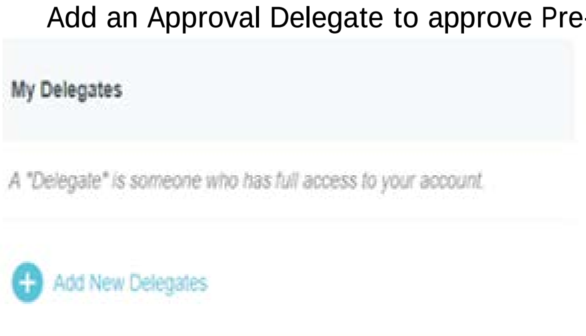
Preferences Setting

- Enter Mileage Deduction for your daily work commute
- Mileage Deduction is a tool that can be used to deduct your work commute when applicable
(Note: Mileage Deduction is not automatically deducted from your reimbursement)



Delegate Settings

- Add a Delegate- Someone who has full access to your account, with the exception of approvals
- Add an Approval Delegate to approve Pre-Approval and Expense Reports during a specified period of time

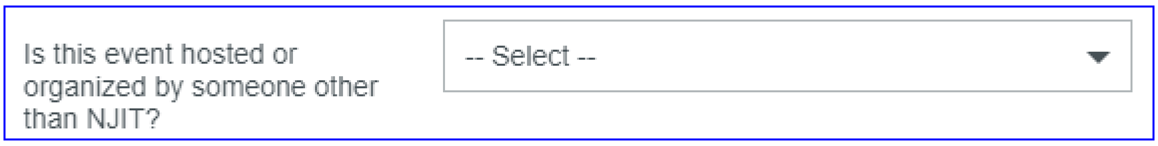


Create a Pre-Approval Report

From the Dashboard:

Create:

1. Select +NEW Button
2. Select New Pre-Approval Report
3. Enter All Required Fields
   (Note: The Report Name should be related to your trip or expense)
4. Based on your Answer to the following question:

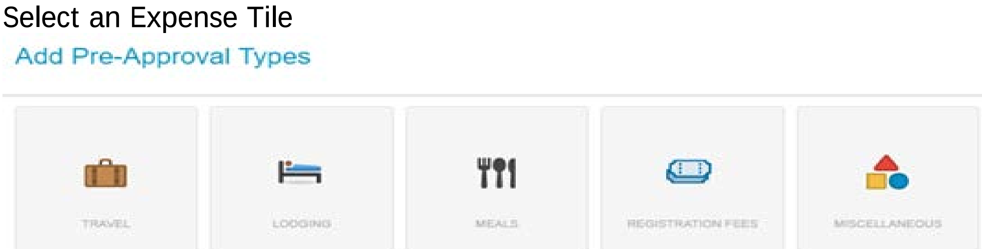


Additional Questions May Populate to Determine if the “Request for Attendance at Events” form is Required

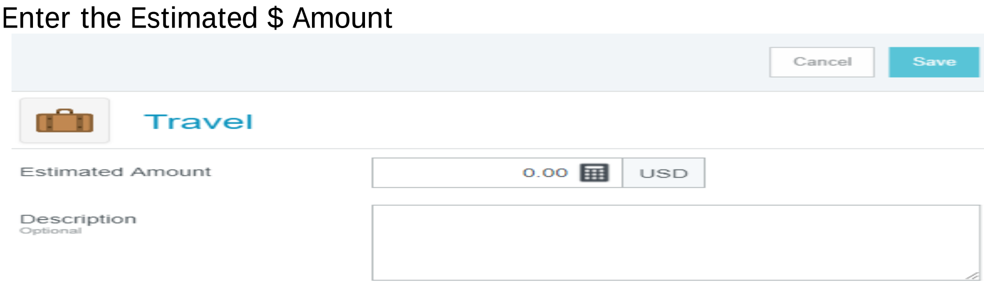
5. Scroll Down to the Allocation Section of the Report and Enter the Index Number
6. Click Save to Add your Estimated Expenses

Add Estimated Expense:

7. Select an Expense Tile



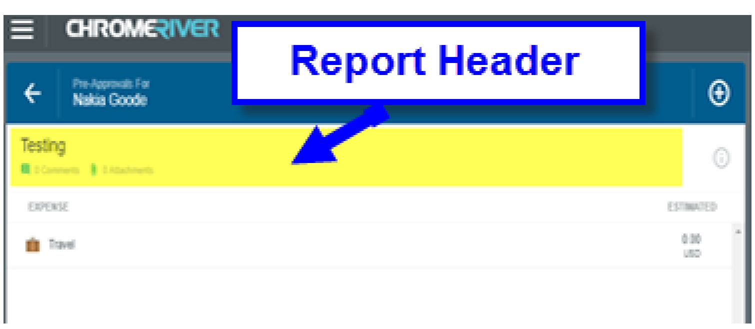
8. Enter the Estimated $ Amount



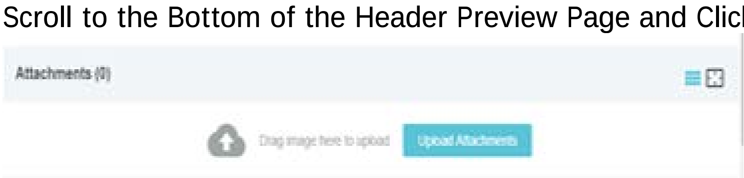
9. Click Save to Add Additional Expense

Add Images & Submit:

10. Click on the Report Header (Left)
11.



12. Scroll to the Bottom of the Header Preview Page and Click Upload Attachments(Right)

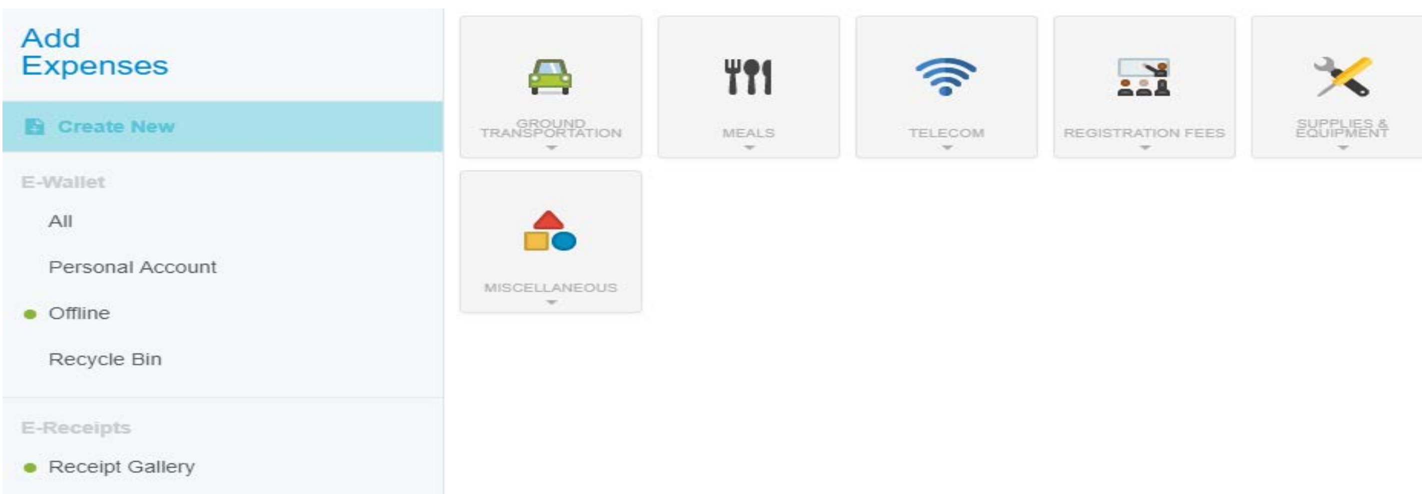


13. Click Submit

Create an Expense Report (Option 1-Add Expenses from Expense Tiles)

From the Dashboard:
Create:
1. Select the +NEW Button
2. Select New Expense Report
3. Enter the Report Name
   (Note: The Report Name should be related to your trip or expense. If a Pre-approval Report was required use the same Report Name used to create the Pre-Approval Report)
4. Select Report Type
5. Click Save

Add Expenses from Expense Tiles:
6. Select the Expense Tile Related to your Expense

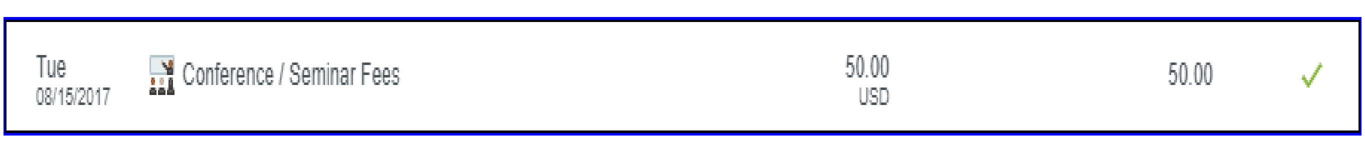


7. Enter the Required Fields

   There are Three Basic Types of Direct Expenses:
   1. **Standard Expense Entry:** This is the basic format for the majority of expenses, including airfare, taxi and parking. The screen will prompt you for such information as date, amount, description and allocation.
   2. **Guest Expense Entry:** Certain expenses, like meals, will have an additional section at the bottom where you can identify any internal or external guests. For more information on adding guests, see **Guest Selector**. Note: Depending on your organization's configuration, the system may assume the expense owner is one of the attendees and add him or her automatically.
   3. **Hotel Expense Entry:** This screen provides wizard-style functionality to allow you to itemize a hotel bill into its various expense types and reconcile the total hotel bill with the detailed entries. For more information on adding a hotel expense entry, see **Hotel Expense Entry**.

   (Notes: The Business Purpose and Index (Allocation) Entered for your First Expense will Carry Throughout the Report Unless Changed at the Line Item. Allocation can be Split between Multiple Indexes by Dollar Amount or Percentage)
8. Click Save
   (Repeat 6-8 Until all Expenses have been Added)
9. Attach Receipts (See **Add Images to an Expense)**

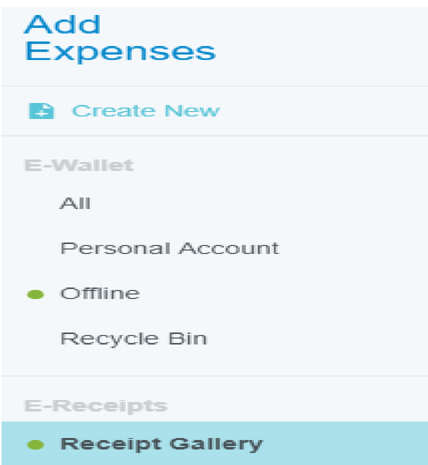
10. Click Submit
    (Note: All Expenses Must have a Check Mark before the Expense Report can be Submitted for Approval)



Create an Expense Report (Option 2-Add Expenses From Images)

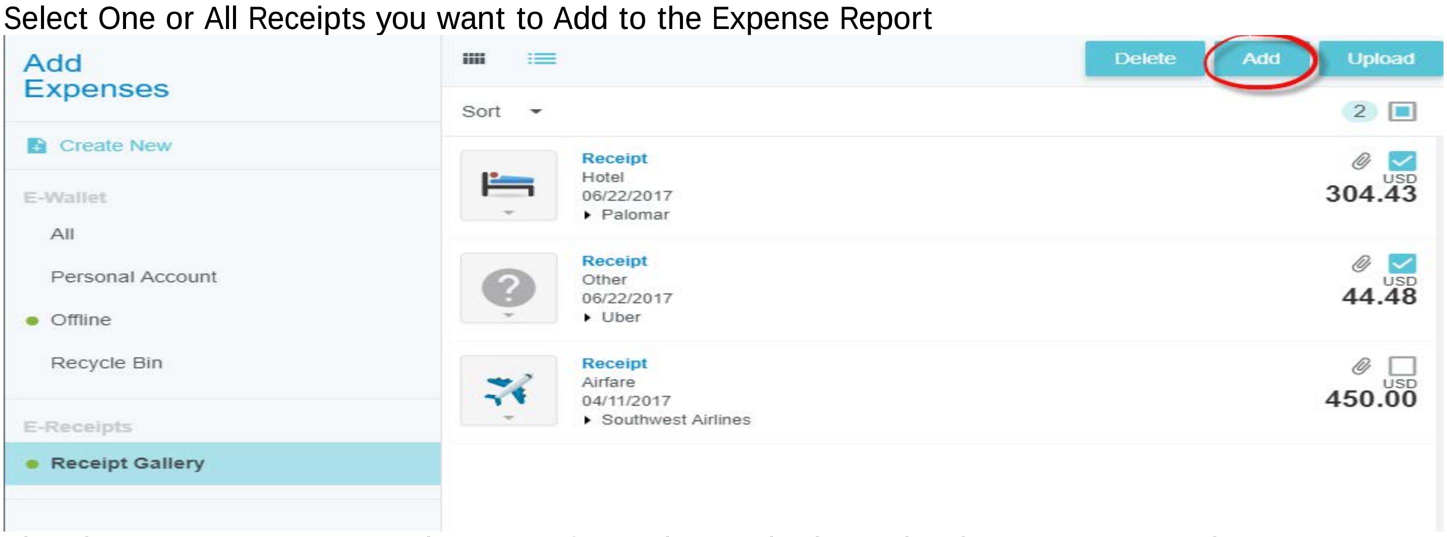
From the Dashboard:
Create:
1. Select the +NEW Button
2. Select New Expense Report
3. Enter the Report Name
   (Note: The Report Name should be related to your trip or expense. If a Pre-approval Report was required use the same Report Name used to create the Pre-Approval Report)
4. Select Report Type
5. Click Save

Add Expenses From Image:
6. Select Receipt Gallery (Note: The Green Dot Indicates there are unused receipts available)



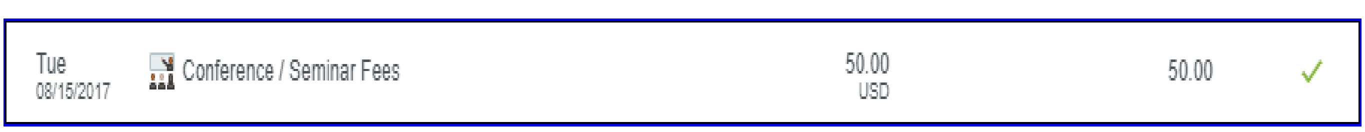
(Note: Receipts in the Receipt Gallery can be viewed in Gallery View (Image of Receipt) or List View Expense Type and $ Amount)

7. Select One or All Receipts you want to Add to the Expense Report



The Line Item Entry Screen will Appear for each Item in the Order they were Selected

8. Enter the Required Fields
   (Note: OCR Technology doesn't always pick up the Correct Receipt Date, Expense Type or Receipt Amount and would need to be corrected)
9. Click Save after Each Expense has been Entered
10. Click Submit
11. (Note: All Expenses Must have a Check Mark Before the Expense Report can be Submitted for Approval)



Adding Images

Add Images to your E-Wallet/Receipt Gallery

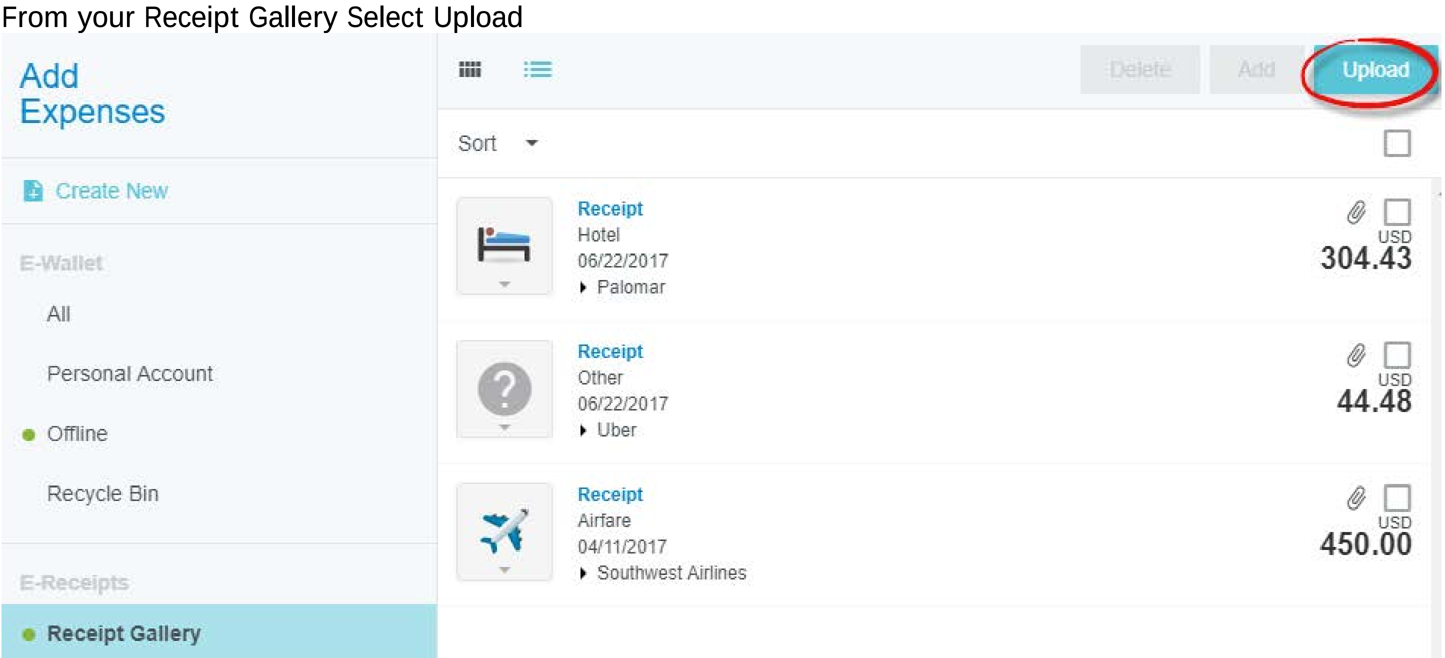
(Note: Only JPG, PDF, PNG, and TIFF files can be accepted, and the combined size of all files uploaded to a single report may be no larger than 100 MB)

Via Email:

Email Pictures and Scanned Documents to receipt@chromefile.com

Via Upload:

From your Receipt Gallery Select Upload



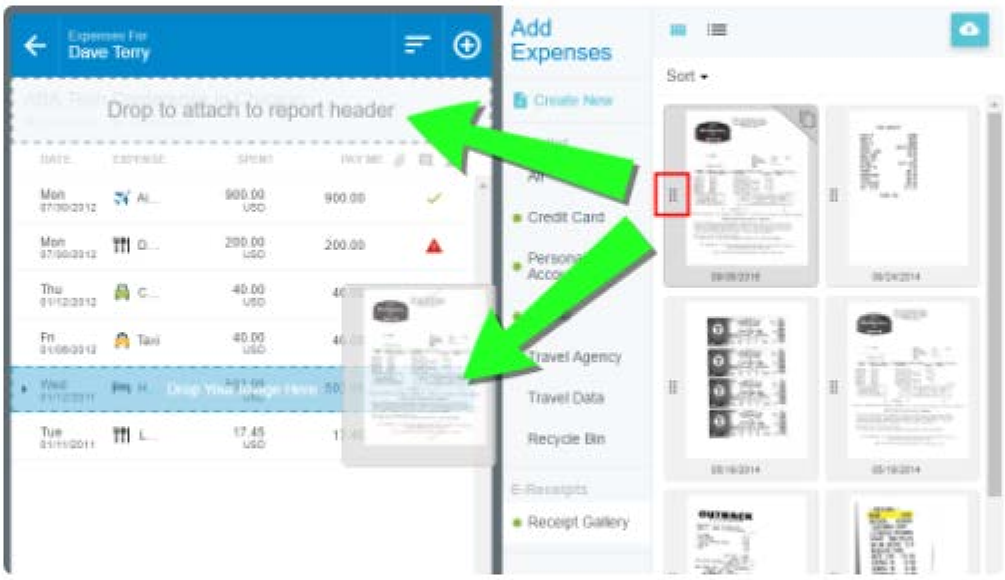
*****See Add Images, Receipt Gallery and Receipt Transactions Located Under EXPENSE on the Chrome River Help Page for Additional Ways to Add Images to Expenses and the Receipt Gallery*****

Add Images to an Expense

(Note: Only JPG, PDF, PNG, and TIFF files can be accepted, and the combined size of all files uploaded to a single report may be no larger than 100 MB)

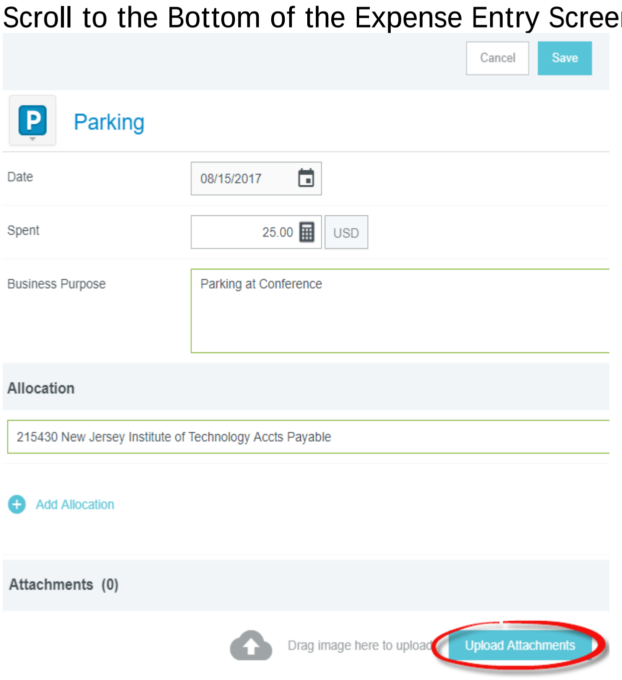
Via the Receipt Gallery:

In **Gallery View** or **List View**, grab the receipt by the small squares icon and drag and drop at the header or the related line items. (Note: All Receipts should be attached to the Line Item and Agenda's or other Supporting Documentation can be attached to the Header)



Via Upload:

Scroll to the Bottom of the Expense Entry Screen and Select Upload Attachments



*****See Add Images, Receipt Gallery and Receipt Transactions Located Under EXPENSE on the Chrome River Help Page for Additional Ways to Add Images to Expenses and the Receipt Gallery*****

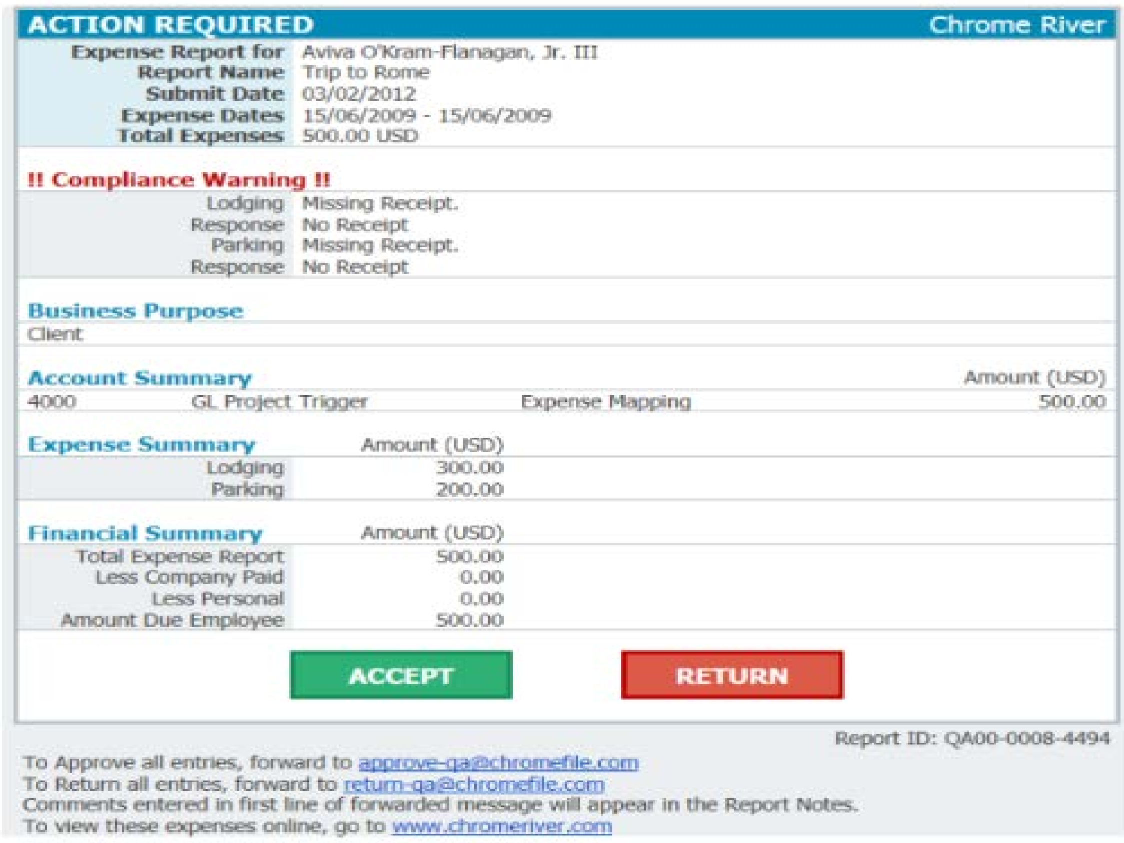
Approvals

Approval Via Email:

Chrome River will email you the expense that requires your approval. From the email you may **approve all** expenses for payment or **return all** expenses to the expense owner with questions or comments simply by tapping the **ACCEPT** or **RETURN** button (users who receive HTML-formatted emails) or forwarding the email (users who receive text-only emails).

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

Note: Email approvals may only be sent from your primary Chrome River account email address, unless your organization has activated the ability to approve from any email address listed in your User Preferences.



There are two ways to route the expense by email:

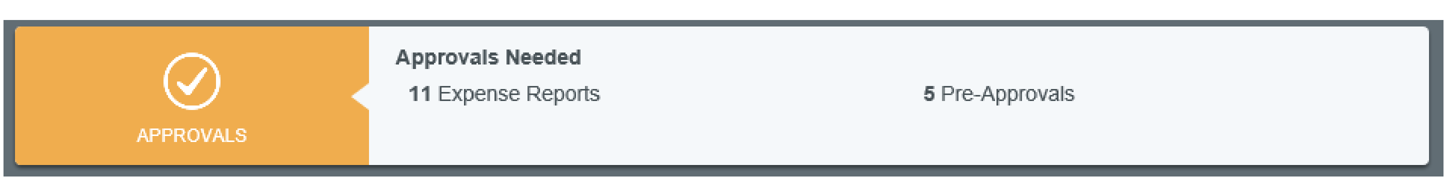
1. Tap **ACCEPT** or forward the email to approve@chromefile.com. This is equivalent to clicking **SUBMIT** in Chrome River EXPENSE online and instantly approves **all** line items on the report.
2. Tap **RETURN** or forward the email to return@chromefile.com. This is equivalent to clicking **RETURN ALL** in Chrome River EXPENSE online and instantly rejects **all** line items on the report.

To add questions or comments, simply type them in the body of the email, above the forwarded text, then click **SEND**.

Approval in Chrome River:

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

- Select Expense Reports to View the List of Expense Reports Needing Approval

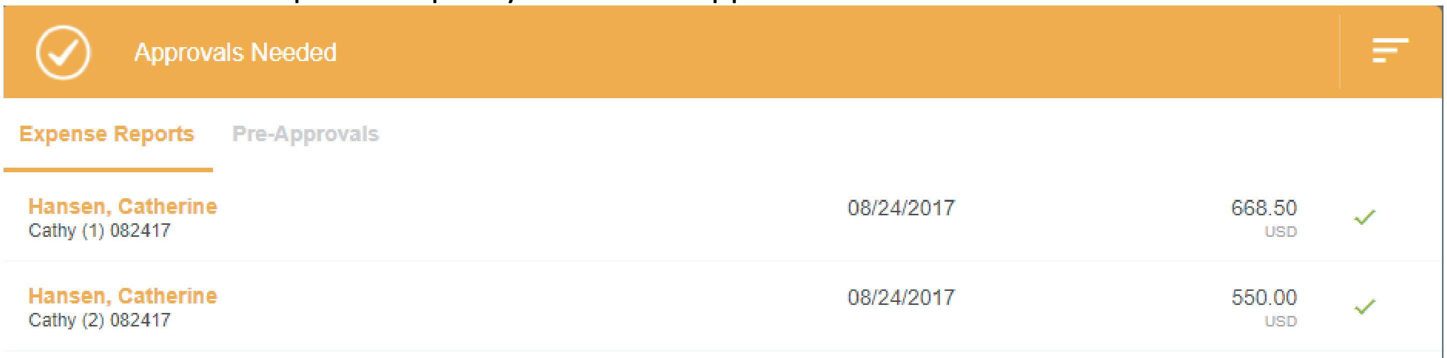


Note: There are two ways to view questions and answers related to the Request for Attendance at Events form.

Option 1- Chrome River Preview Screen **Option 2**- PDF

Option 1 (Chrome River Preview Screen)

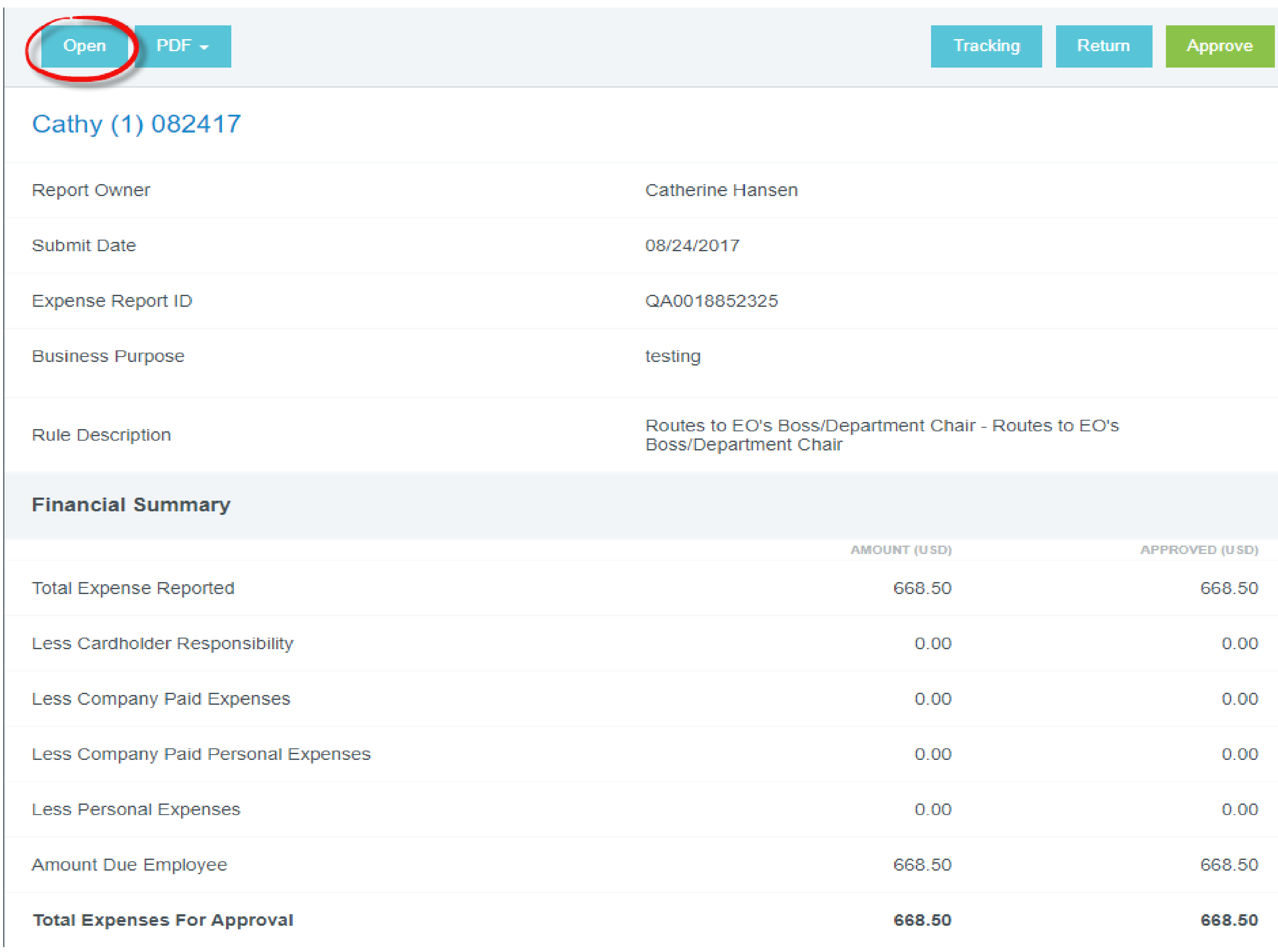
- Select the Expense Report you want to approve



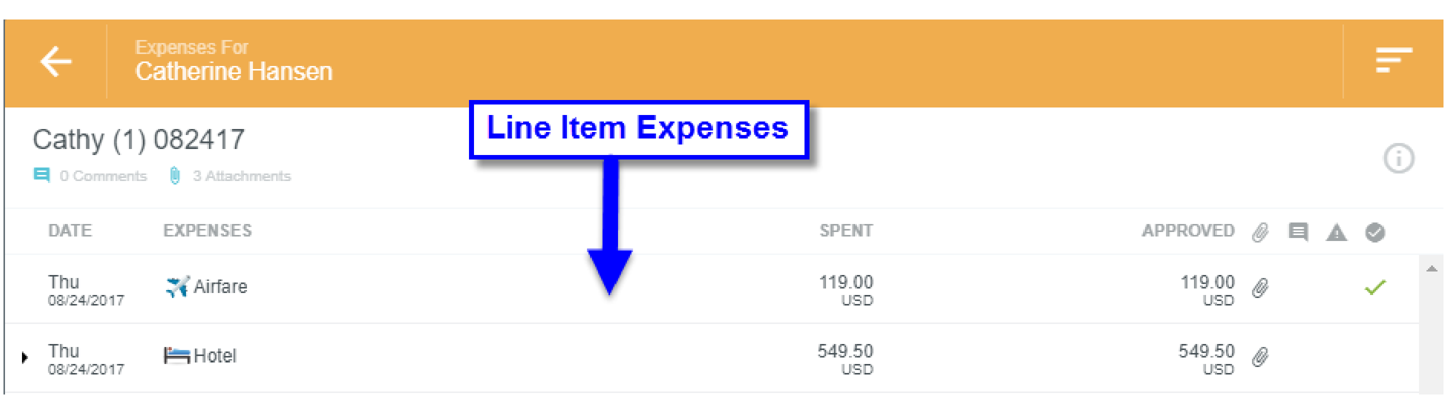
- The Preview Screen will Open to the Right of the Screen or Depending on the Screen Size of the Device you are Using it will Replace the Current Screen

  (If Open or PDF Do Not Appear at the Top of the Page as Shown below Click on the •••)

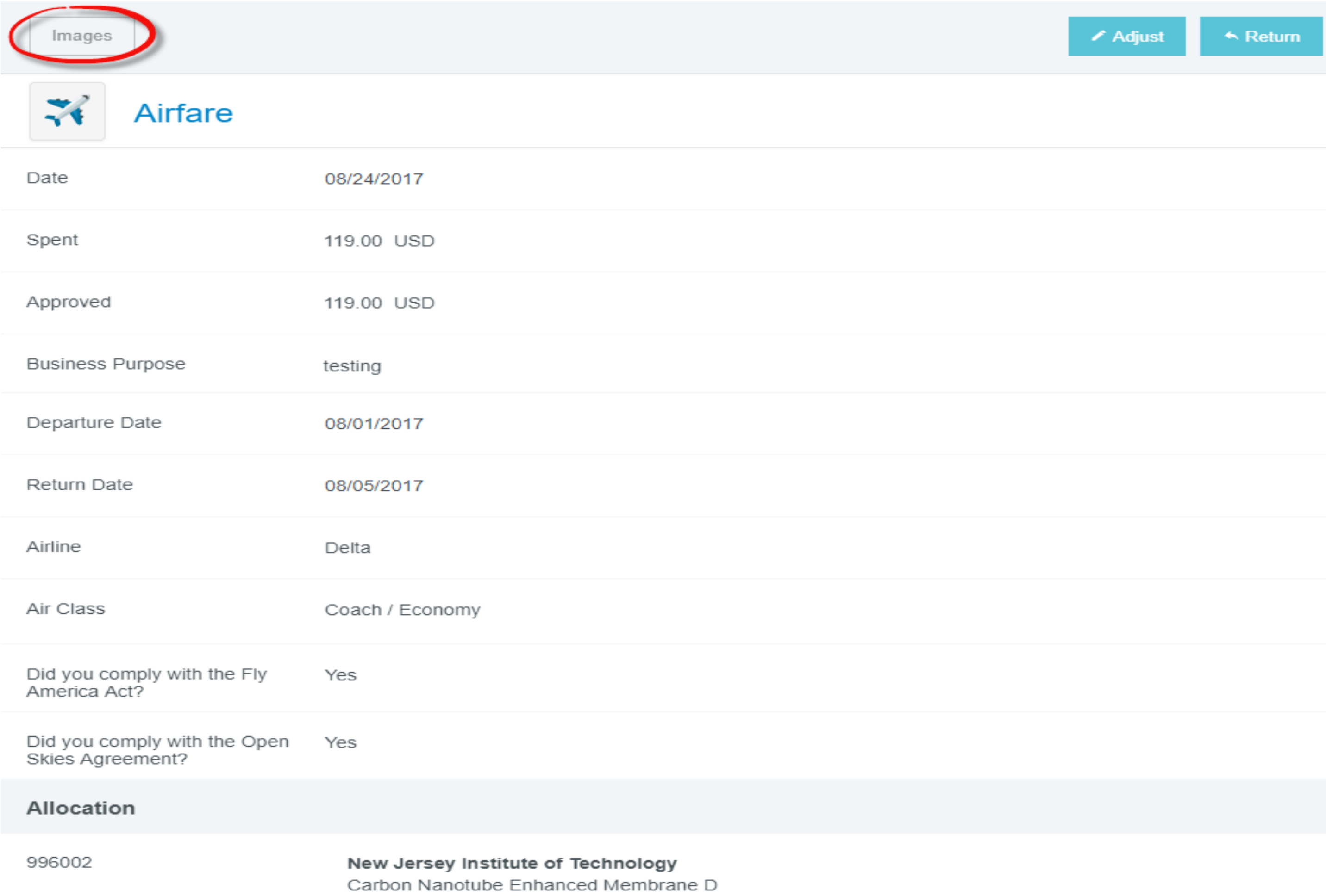
- Select Open



- Click on Each Line Item Expense to View the Expense Detail and Receipt

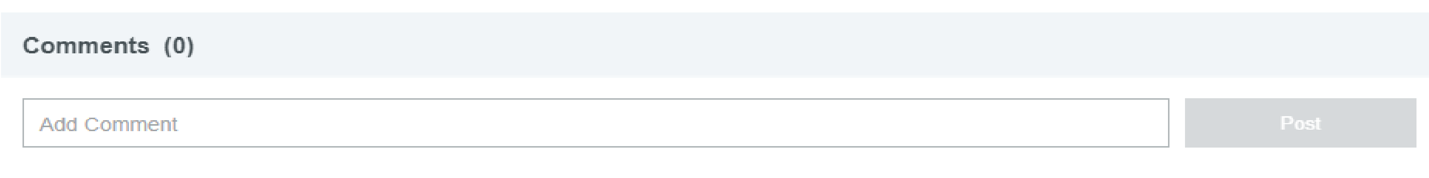


- The Preview Screen will Open to the Right, Displaying the Expense Item Detail



- To View the Receipt(s) Click Images or Scroll to the Bottom of the Page and Click on the Receipt(s)

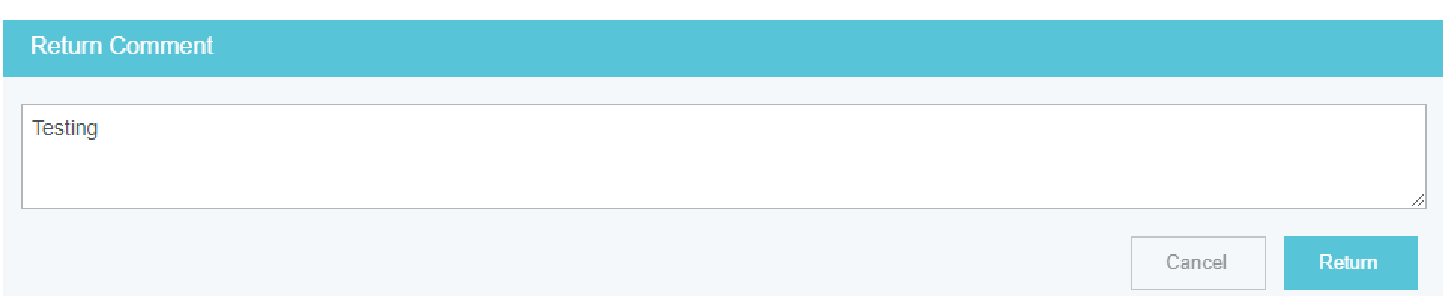
- Click in the Add Comment Box to add a Comment (Optional)



- Click Approve or Return

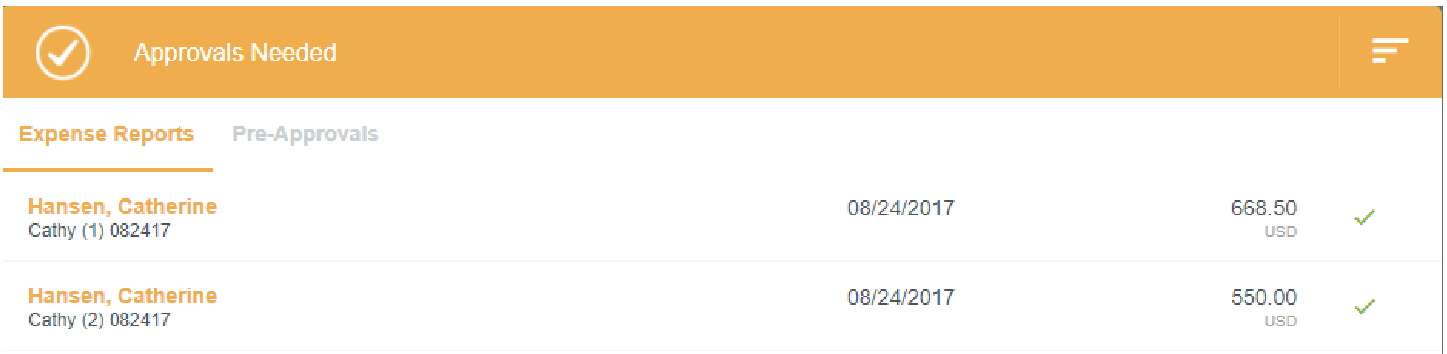
- Click Approve or Return a second time to confirm your decision

Note- When returning an Expense Report a Return Comment is required



Option 2 (PDF)

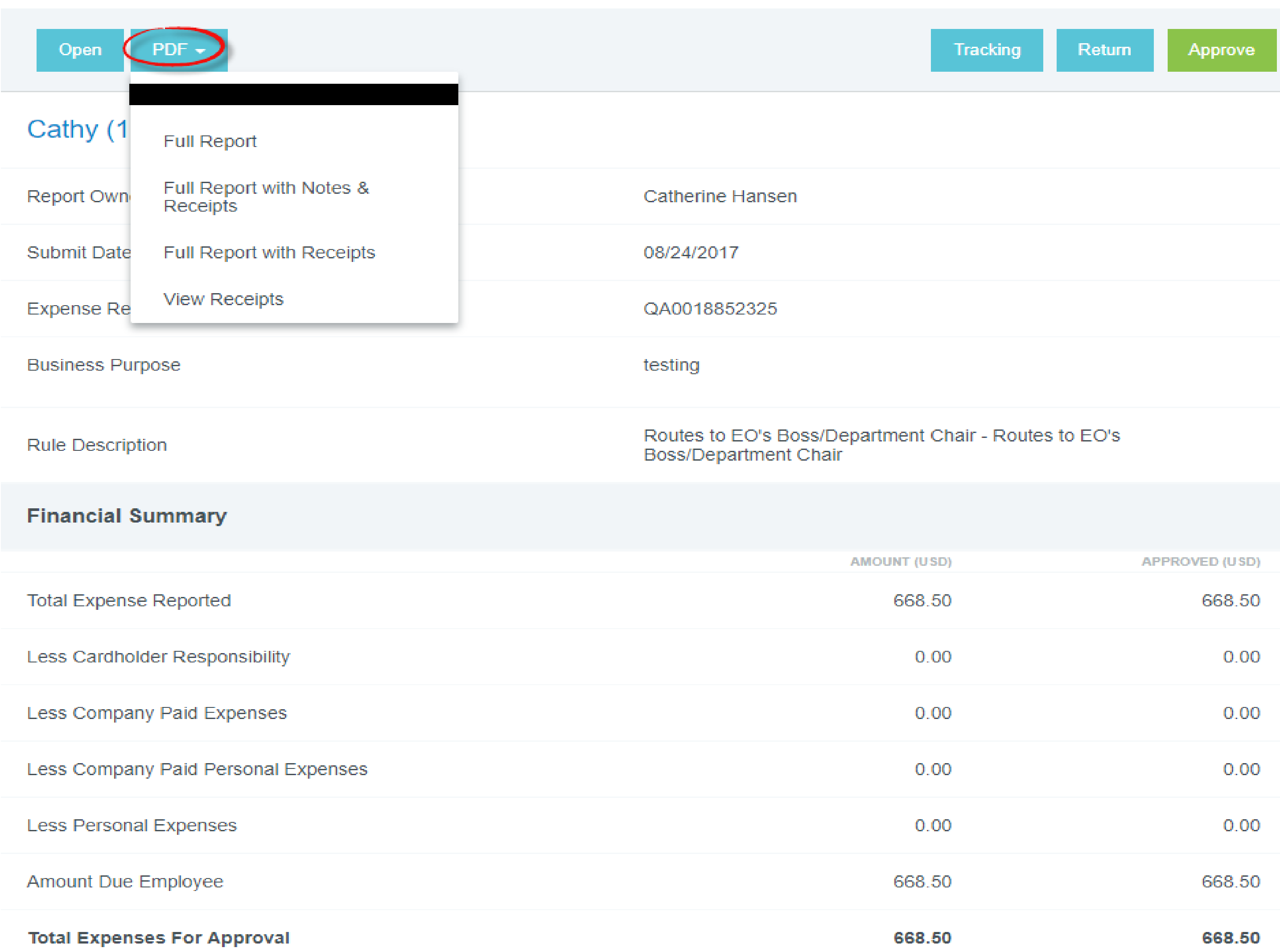
- Select the Expense Report you want to approve



- The Preview Screen will Open to the Right of the Screen or Depending on the Screen Size of the Device you are Using it will Replace the Current Screen

(If Open or PDF Do Not Appear at the Top of the Page as Shown below Click on the •••)

- Select PDF and 1 pf the 4 Options



- A New Tab will Open Based on your Selection from the PDF Drop Down Menu

Expense Report — Report ID: QA00-1885-2325

Report Name	Cathy (1) 082417
Expense Owner	Catherine Hansen
Expense Owner ID	CHANSEN
Created By	Catherine Hansen
Submit Date	Aug 24, 2017
To Be Paid In	USD

Please place this cover sheet in front of hardcopy receipt pages and then scan or fax to:
Email: expense-qa@chromefile.com Fax: (617) 208-2534

Financial Summary

	Amount (USD)
Total Expenses Reported	668.50
Less Company Paid Expenses	0.00
Amount Due Expense Owner	668.50

Expense Summary

Expense Type	Amount (USD)
Airfare	119.00
Hotel	549.50
Total	668.50

Allocation Summary

Allocations Charged			Amount (USD)
996002	New Jersey Institute of	Carbon Nanotube Enhanced	668.50
Total			668.50

Expense Details — Report ID: QA00-1885-2325

Expense Report — Cathy (1) 082417

Item	Date	Alert	Cost Code	Type	Disb Amt	Pay Me Amt
1	08/24/2017		740008	Airfare	119.00 USD	119.00 USD

Business Purpose Description: testing

Receipt Attached: No Firm Paid: No

Allocations: 996002 New Jersey Inst Carbon Nanotube Enha 119.00 USD

AirClass	Coach / Economy
Airline	DL
DepartDate	08/01/2017
FlyAmerica	Yes
OpenSkies	Yes
ReturnDate	08/05/2017

Item	Date	Alert	Cost Code	Type	Disb Amt	Pay Me Amt
2	08/24/2017			Hotel	549.50 USD	549.50 USD

Business Purpose Description: testing

Receipt Attached: No Firm Paid: No

Allocations: 996002 New Jersey Inst Carbon Nanotube Enha 549.50 USD

Item	Date	Cost Code	Type	Disb Amt	Pay Me Amt
2.1	08/24/2017	740008	Hotel - Lodging	500.00 USD	500.00 USD

Business Purpose Description: testing

Firm Paid: No

Allocations: 996002 New Jersey Inst Carbon Nanotube Enha 500.00 USD

Item	Date	Cost Code	Type	Disb Amt	Pay Me Amt
2.2	08/24/2017	740008	Hotel - Parking	25.00 USD	25.00 USD

Business Purpose Description: testing

Firm Paid: No

Allocations: 996002 New Jersey Inst Carbon Nanotube Enha 25.00 USD

Item	Date	Cost Code	Type	Disb Amt	Pay Me Amt
2.3	08/24/2017	740008	Hotel - Internet	14.50 USD	14.50 USD

Business Purpose Description: testing

Firm Paid: No

Allocations: 996002 New Jersey Inst Carbon Nanotube Enha 14.50 USD

Item	Date	Cost Code	Type	Disb Amt	Pay Me Amt
2.4	08/24/2017	740008	Hotel - Meals - Actual	10.00 USD	10.00 USD

Business Purpose Description: testing

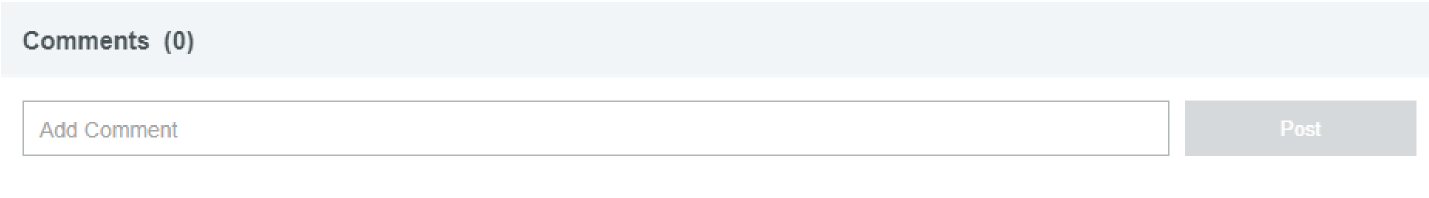
Firm Paid: No

Allocations: 996002 New Jersey Inst Carbon Nanotube Enha 10.00 USC

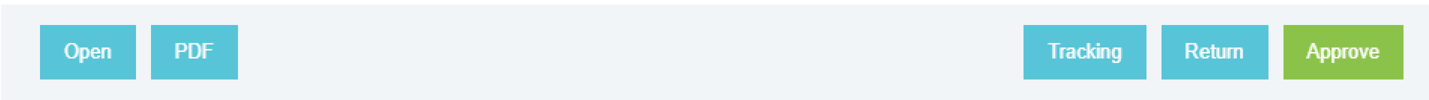
Internal Guests: Catherine Hansen New Jersey Institute of Technology Accounts Payable Specialist 10.00

MealType	Dinner
NumPeople	1
Merchant	
AlcoholAmount	0.00
TipAmount	0.00
IsActivity	0
TipPercentage	0.00

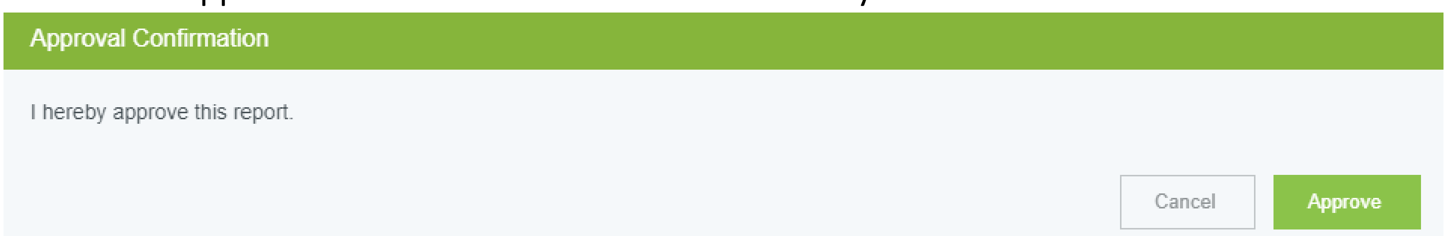
- Close the Tab to Return to Chrome River
- If you did not select the PDF Option with Receipts, to View Receipts Click Images or Scroll to the Bottom of the Page and Click on the Receipt(s)
- Click in the Add Comment Box to add a Comment (Optional)



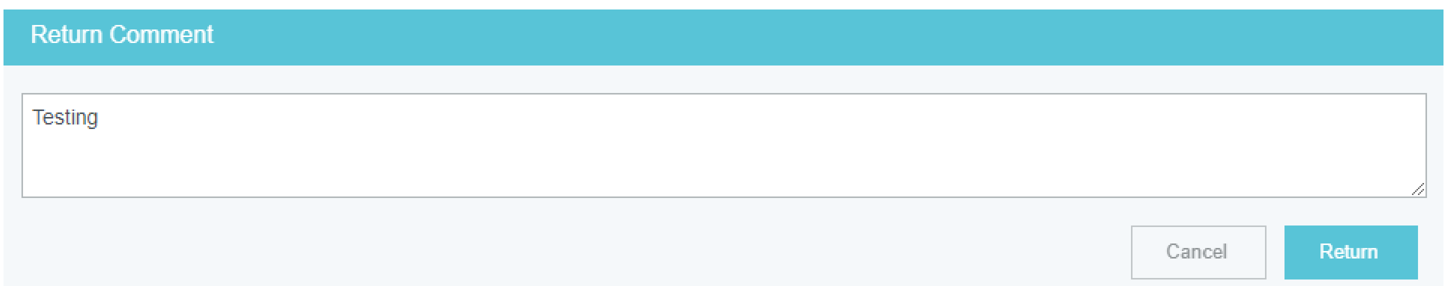
- Click Approve or Return



- Click Approve or Return a second time to confirm your decision



Note- When returning an Expense Report a Return Comment is Required



Note: For additional information on Approvals, please visit Chrome River's Help section by clicking on your User Name and selecting HELP.