A. Launch Chrome River

1) Chrome River Production (single sign on)
https://app.chromeriver.com/login/sso/saml?CompanyID=nccu.edu

from the MyEOL home page:

[Image of login screen]

2) Chrome River Test (not single sign on)
https://qa-app.chromeriver.com/login

B. Navigation Bar

return to home screen dashboard

menu button (hamburger icon)

select user, settings, help

new Pre-Approval (PA) report, or new Expense Report (ER)

C. Home Screen Dashboard

home screen dashboard

Approvals (if applicable)

Expense Reports (ER)
- drafts
- returned
- submitted last 90 days*

Pre-Approval (PA) Reports
- drafts
- returned
- submitted last 90 days*

*important: The Dashboard PA/ER "submitted" tiles show the count of PA/ER reports submitted in the last 90 days, however clicking the tile brings up a list of all PA/ER reports the user ever submitted. This is the primary way the user/traveler accesses their submitted PA/ER reports (review status, etc.).
D. User settings (Delegates)

1. Go to user settings

2. Add Delegates

Add a "Delegate" to give a user access to prepare PA/ER travel reports on your behalf.

(In this case, Debbie Lell added Theresa Wall as a delegate.)

Add an "Approval Delegate" if you are an approver and will be out of office (specify dates). This person will receive all of your approvals until the end date or you hit the cancel button.

3. Theresa Wall (admin) can select Debbie Lell (traveler)

T.Wall selected D.Lell and is now preparing PA/ER travel reports for D.Lell.

T.Wall is a delegate for preparing travel for L.McHale, D.Lell and G.Ward
E. Travel – general information

Report Types and Payment Information:

1) Pre-Approval (PA) reports are required for authorization to travel* – no payments are made
2a) Pre-Trip Expense Reports (ER) – for employee "cash advances" + "vendor pre-payments"
2b) Post-Trip Expense Reports (ER) – for employee expense reimbursements and travel close out

*Per Travel REG 30.04.5, item 6.1.

Allowable "Cash Advances" and "Vendor Pre-Payments":

![Summary of Allowable "Cash Advances" and "Vendor Pre-Payments"]

FUND-ORG Security:

- The Traveler (not the delegate) must have Banner ['Requisition (B)’ or ‘Inquiry (Q)’ is OK] FUND and ORG access, otherwise they will not be able to select that FUND-ORG in the Allocation.
1. Fill out the PA report information

- **Report Name (include):** traveler, destination, departure date
- **default Banner Supervisor** (timecard approver)
- **If an override of the default Spvr. is needed (or is blank), check the box. You will be required to select an alternate Spvr. at report submission.**
- **An explanation comment is required for an override.**
- **Allocation = FUND + ORG** (type any part to search)
2. Add expenses to Pre-Approval (PA) report

[Left pane – PA report name, expense line items]

[Right pane – detail for item you clicked on left pane]

3. Add attachments (at the report level) and click "Submit"
G. Tracking of submitted PA/ER Reports

1. Go to your report

More options button (kabob icon)

2. Click report name [left pane], then "Tracking" [right pane]

2. Tracking shows routing steps and current status

status: report approved

click on any step in the approval workflow to view the details

approval date

approved by

routing step name
H. New Expense Report (ER)

1. **Important:** Scroll to the bottom and click "Import Data from Pre-Approval"

2. Select the corresponding Pre-Approval (PA) report for this Expense Report (ER), click "Create"

For Pre-Trip Expense Reports – go to section H.1
For Post-Trip Expense Reports – go to section H.2
H.1 Pre-Trip Expense Report (ER)

3a. Select the appropriate Pre-Trip Expense Report Type

Then finish completing all fields,
Is this the final liquidation of the encumb.? = No
Click "Save"

4a. Finish making edits to the expense line items, then hit "Submit" button.

For each expense, you must either click "Edit" button and complete/save the expense, or delete the expense:

(A) Pre-Trip Expense Report:
1. Only submit expenses that are "cash advances" or "vendor pre-payments" (delete all other expense rows) - see page 6 summary table.

Symbols change from warning to green check, as "edit" complete/save is finished.

To delete rows, hit delete button or "..." kabob icon
H.2 Post-Trip Expense Report (ER)

3b. Select the Post-Trip Final Expense Report Type

Then finish completing all fields, Is this the final liquidation of the encumb.? = Yes

Click "Save"

4b. Finish making edits to the expense line items, then hit "Submit" button.

For each expense, you must either click "Edit" button and complete/save the expense, or delete the expense:

(B) Post-Trip Expense Report:

1. If you have a cash advance you must add it to the report: (+) button -> green dot cash advance.
2. You must delete any expense rows from the PA import already paid out as "Vendor Pre-Payments".
   (Otherwise, you are requesting reimbursement for amounts already paid to vendors – in error.)
3. Do not delete rows that were cash advance expenses, they are applied against the cash advance.
4. If money is owed back to NCCU, you must use the "cash advance return" tile.

Symbols change from warning to green check, as "edit" complete/save is finished.

To delete rows, hit delete button or "..." kabob icon
I. Receipts

**Attaching Receipts:**
- Receipts can be attached from files from your local or network drives.
- Receipts can also be e-mailed to receipts@chromefile.com (from snapping a picture on a phone, forwarding a hotel e-mail receipt, etc.) and the receipts will then appear in your "Receipt Gallery" to use for PA/ER reports.
McHale, Luke

From: expense-noreply@chromefile.com
Sent: Sunday, April 08, 2018 9:57 AM
To: McHale, Luke
Subject: Chrome River Pre-Approval Request [D Lell]

Pre-Approval ID: 0100-0042-4575

<table>
<thead>
<tr>
<th>ACTION REQUIRED</th>
<th>Chrome River</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Approval Request For</td>
<td>Debbie Lell [<a href="mailto:dlell@nccu.edu">dlell@nccu.edu</a>, SUPERVISOR]</td>
</tr>
<tr>
<td>Report Name</td>
<td>Debbie Lell, San Diego, 04/08/18</td>
</tr>
<tr>
<td>Pre-Approval ID</td>
<td>0100-0042-4575</td>
</tr>
<tr>
<td>Submit Date</td>
<td>04/08/2018</td>
</tr>
<tr>
<td>Expense Dates</td>
<td>04/08/2018 - 04/11/2018</td>
</tr>
<tr>
<td>Total Expenses Approved</td>
<td>1,688.00 USD</td>
</tr>
<tr>
<td>Prior Approver</td>
<td>Debbie Lell</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Brenda G Logan</td>
</tr>
<tr>
<td>DestinationCountry</td>
<td>USA</td>
</tr>
<tr>
<td>TravAffiliation</td>
<td>Employee</td>
</tr>
<tr>
<td>DestinationCity</td>
<td>San Diego</td>
</tr>
<tr>
<td>DestinationState</td>
<td>California</td>
</tr>
<tr>
<td>OverrideApprComment</td>
<td>Brenda is out of office, send to Brenda's Spvr. Luke McHale</td>
</tr>
<tr>
<td>ERStartTime</td>
<td>7:00am-7:29am</td>
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<tr>
<td>EREndTime</td>
<td>5:30pm-5:59pm</td>
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<tr>
<td>TripType</td>
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<td>OverrideAppr</td>
<td>Yes</td>
</tr>
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</table>

Business Purpose
Ellucian Live Conference, San Diego, CA purpose: professional development

<table>
<thead>
<tr>
<th>Account Summary</th>
<th>Amount (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>300170 100% Trust Fund - Institutional Support - Org: 30140 Comptroller</td>
<td>1,688.00</td>
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</table>

Expense Details

<table>
<thead>
<tr>
<th>Expense</th>
<th>Description</th>
<th>Amount (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airfare</td>
<td>Airfare, Delta airlines</td>
<td>650.00</td>
</tr>
<tr>
<td>Airport Parking</td>
<td></td>
<td>40.00</td>
</tr>
<tr>
<td>Lodging</td>
<td>$125 per night x 3 nights</td>
<td>375.00</td>
</tr>
<tr>
<td>Meals</td>
<td>meals not included in trip</td>
<td>123.00</td>
</tr>
<tr>
<td>Registration Fees</td>
<td>Ellucian Live Conference Registration Fee</td>
<td>500.00</td>
</tr>
</tbody>
</table>

>> View Images

Pre-Approval ID: 0100-0042-4575
To take action on these expenses, take either of the following steps:
- Click on the **ACCEPT** or **RETURN** button as appropriate and add any comments to the new email that opens,
- OR **FORWARD** this email to approve@chromefile.com or return@chromefile.com with any comments at the top of the forwarded message.

To view this Pre-Approval or access the Chrome River application [click here](#).