Chrome River
Travel Guide
ATHLETICS

Payment Services
Travel
409.880.8383
travel@lamar.edu
Created: 2021

CONTENTS

What is Chrome River?

Chrome River is Lamar University's new expense management system, designed to automate the travel reimbursement reconciliation process. This application will replace the current process completed with Travel Vouchers and Team Travel Request to Pays.

Chrome River will allow users to capture receipts and submit reports entirely electronically. Approvals for all reports will be routed automatically and users can track the progress of their expense report as it moves through the approval stages. Approvers can review reports remotely and approve through email or through the application. Chrome Rivers functionality integrates checks against the University's travel and expense policies to make policy compliance and checking easier and more transparent.

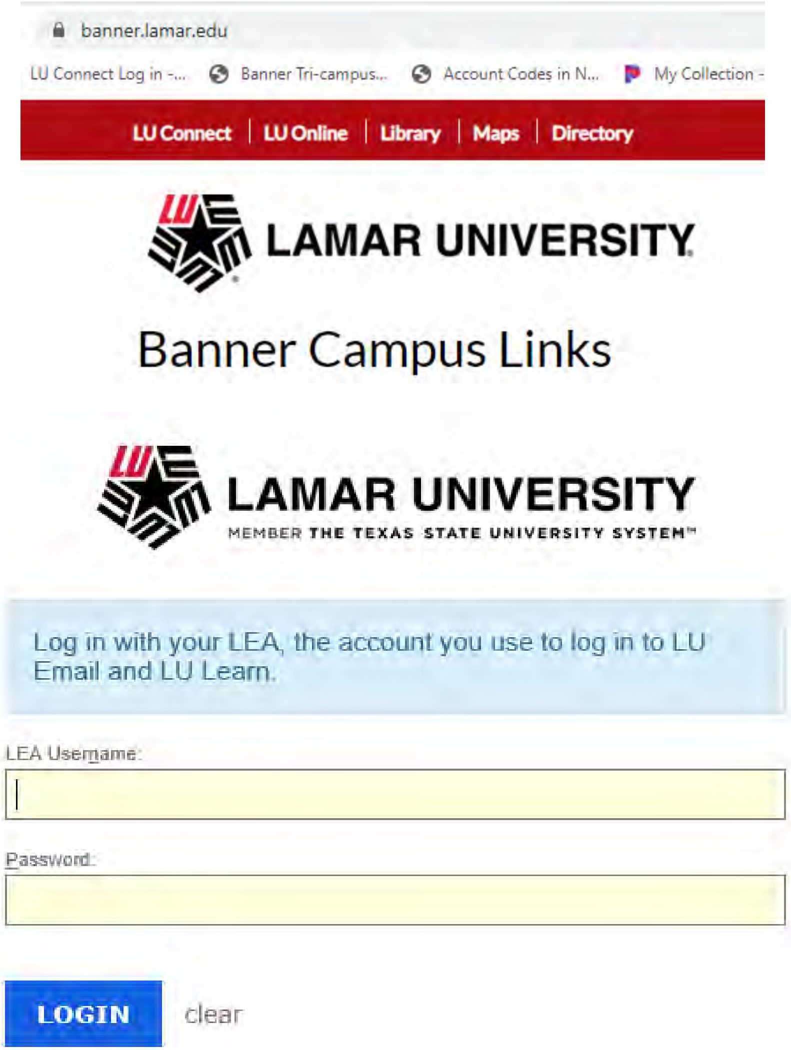
This will eliminate printing, taping, and stapling of the past travel documents, no more tracking down signatures, and no more submitting through interoffice mail. Chrome River makes the whole process electronic!

CHROME RIVER TERMINOLOGY

- **Pre-Approval Report-**This is what we know as the “Request to Travel”. This section provides access to all in-process, draft pre-approval reports, returned pre-approval reports that are submitted within the last 90 days. Older submitted documents can be accessed through the inquiry screens.
- **Approvals-**This section appears when the user has items that require the user’s approval. This section will disappear when the user has approved all documents in their approval queue.
- **Expenses-**This sections provides access to all in-process or draft expense reports, returned expense reports, and all expense reports submitted within the last 90 days. Older submitted documents can be accessed through the inquiry screens.
- **Delegate-**Create Expense Reports and Pre-Approvals for another person and access their Settings menu, Home screen, and Inquiry Reports. You will receive copies of any email notifications regarding rejection or adjustment of reports created for the traveler. However, you will not be able to approve expenses that are routed to that person.
- **Approval Delegate-**Temporary approval for Expense Reports, Pre-Approvals and/or invoices for another person.

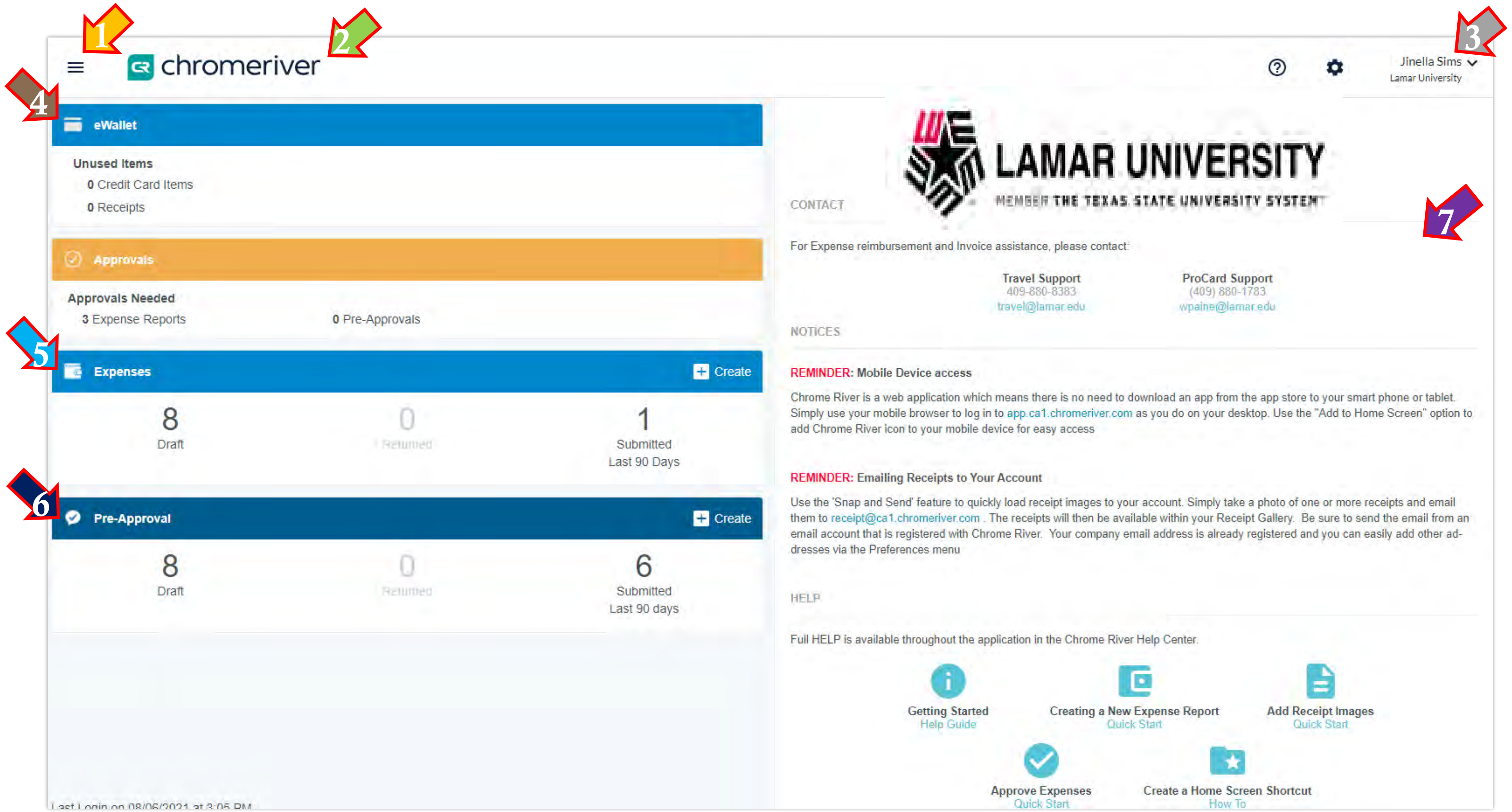
HOW TO LOGIN

To access Chrome River Test, go to https://banner.lamar.edu/ Select Chrome River Test. Under LU Test for practice purposes only. Use your LEA login and password.



To access Chrome River, go to the https://banner.lamar.edu/ Select Chrome River under LU Production. Use your LEA login and password.

DASHBOARD TOUR



Dashboard Helpful Hints

1-The Menu bar allows you to select approvals, reports, and other inquiries

2-Click on “Chrome River” from any screen to return to the dashboard

3-Shows you are logged into Chrome River and can bring up other options

4-Shows items in your EWALLET needing attention

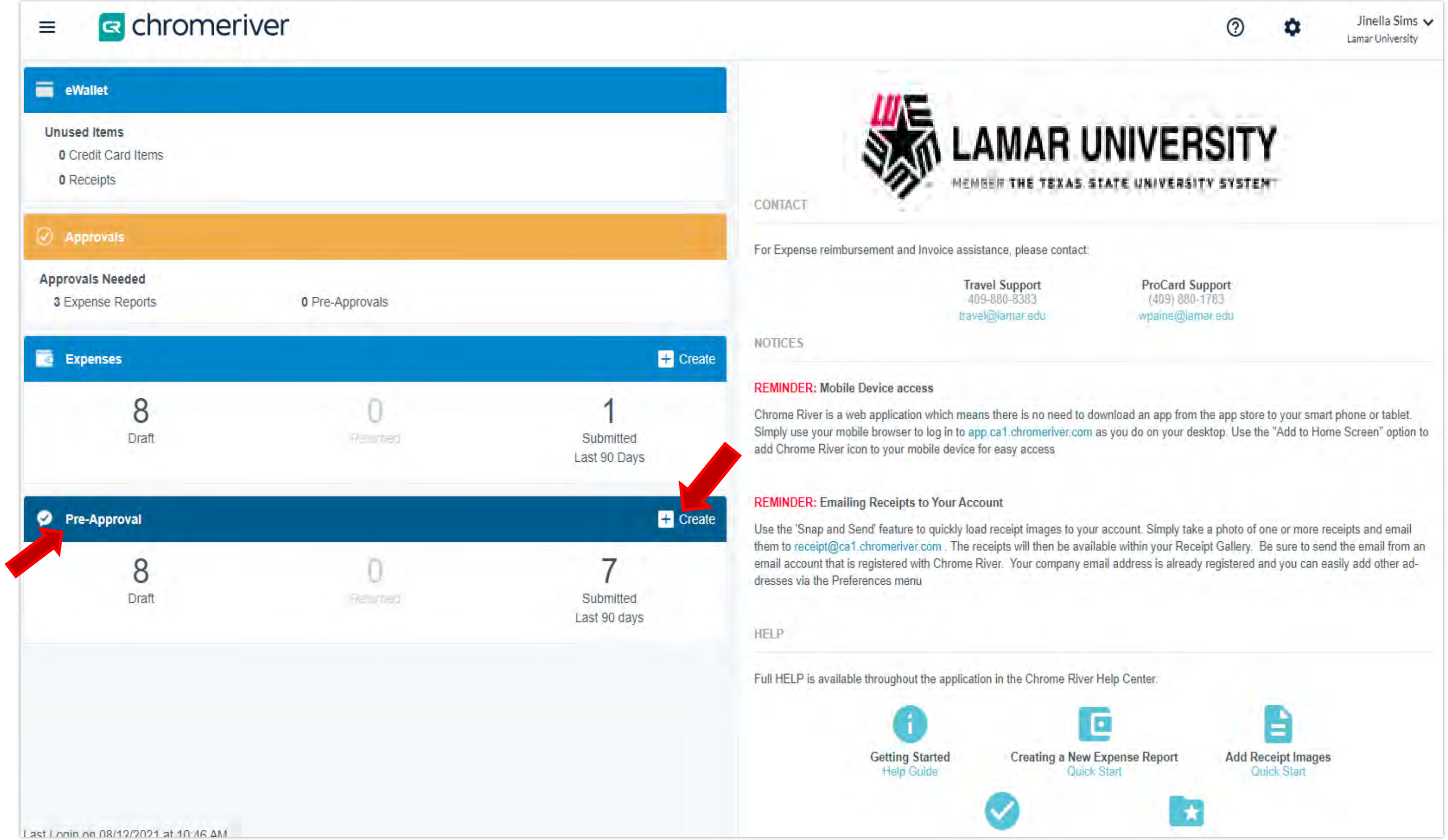
5-Shows expenses in drafts, returns, submissions for approval and allows you to choose the option to create an expense report

6-Shows the Pre-Approvals in drafts, returns, and submission approvals and allows you to create a pre-approval report

7-Shows helpful contact information and helpful links

CREATING A PRE-APPROVAL

On your dashboard go to "Pre-Approval" and Click the "+" to create and a pre-approval report.



Cancel | Save

LAST STEP

Pre-Approvals For Jinella Sims

Report Name	SIMS - SAN ANTONIO, TX 06.20-06.23
Start Date	06/20/2021
End Date	06/23/2021
Number of Days	4
Business Purpose	Chrome River Conference
Report Type	Travel
Trip Type	Domestic (in Texas)
Traveler Type	Individual
This is Athletic Team Travel or On-Campus Athletic Official Visit Expenses	☐
Check here if this trip is to Washington DC for activities that involve obtaining or spending federal funds or that impact federal policies.	☐
Cash Advance Amount	0
Fiscal Year	FY21

Please type the INDEX you would like to search for in the allocation box below. As you type, a drop down list of matching items will be displayed for selection.

Allocations

430110 Financial Services FUND: 140001 - Designated Tuition / ORGN: 30110 - Financial Services / PROG: 600 - Instit...

This is what we know as the INDEX

Add Allocation

Complete the Pre-Approval Name:

LAST NAME-CITY, STATE, DEPARTURE DATE, RETURN DATE

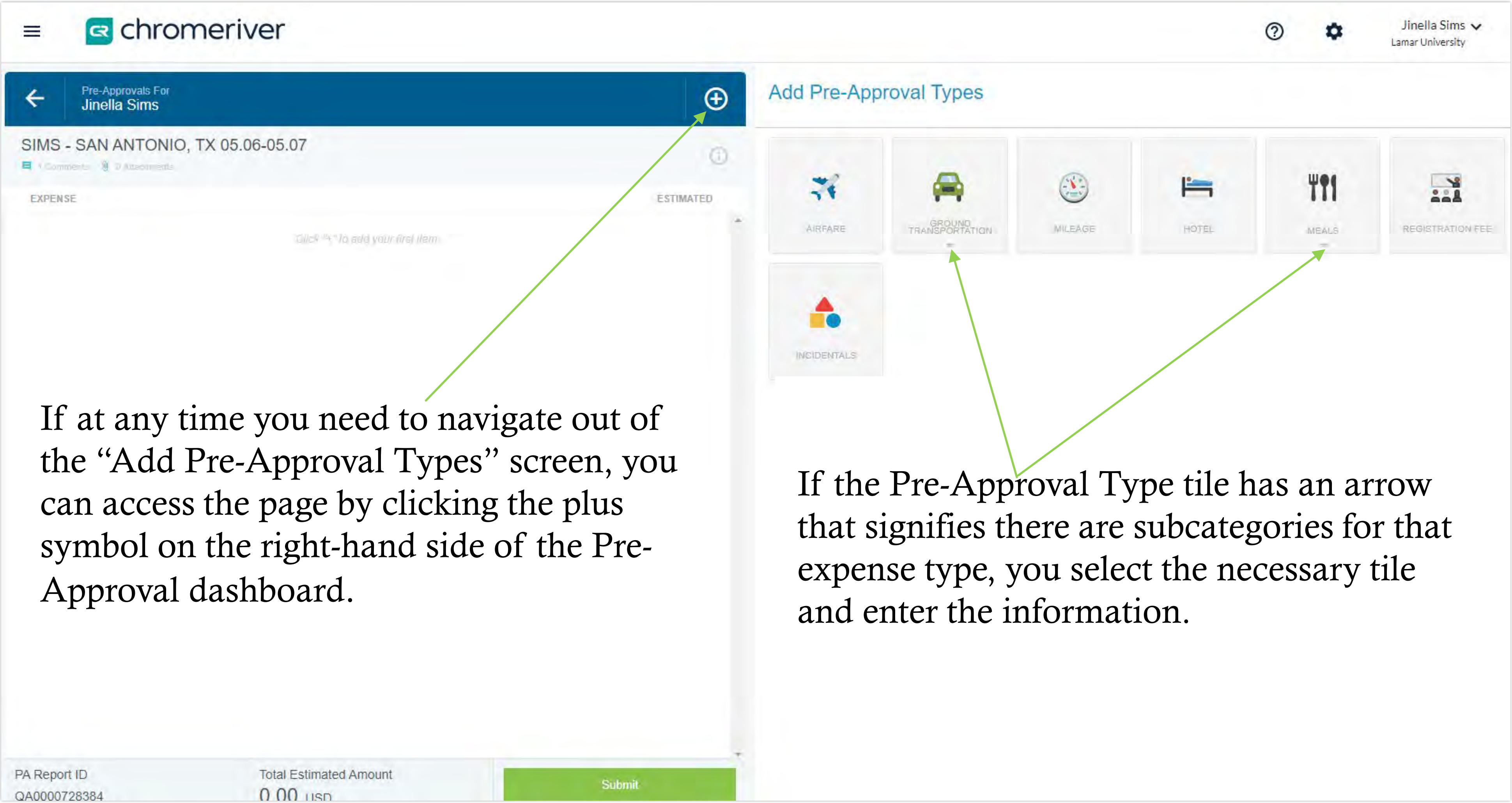
Complete the remainder of the information requested. Entering the allocation designates the INDEX to cover the travel. Click “Save” at the top of the form once screen is completed.

Drop down arrows provide more selections to choose from.

Cash Advances are only issued for travel involving students or teams/sports.

The Fiscal Year should default to the current year, please do not change.

The "Add Pre-Approval Types" page will appear.
Here you enter travel cost estimates based on the expenses you expect to incur.

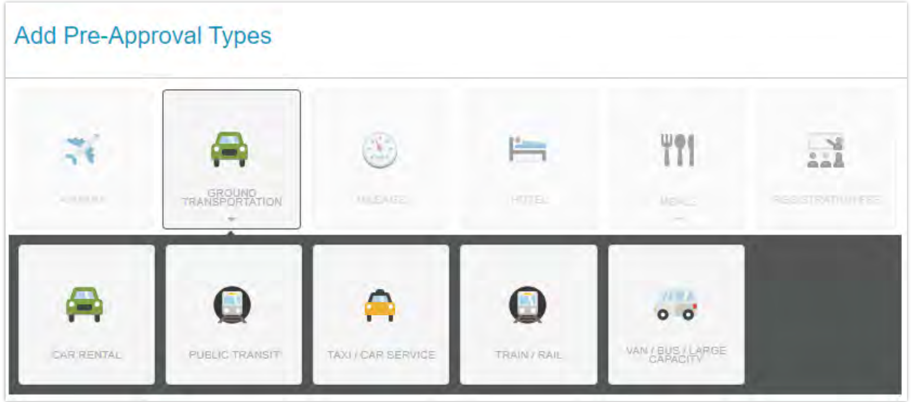


If at any time you need to navigate out of the "Add Pre-Approval Types" screen, you can access the page by clicking the plus symbol on the right-hand side of the Pre-Approval dashboard.

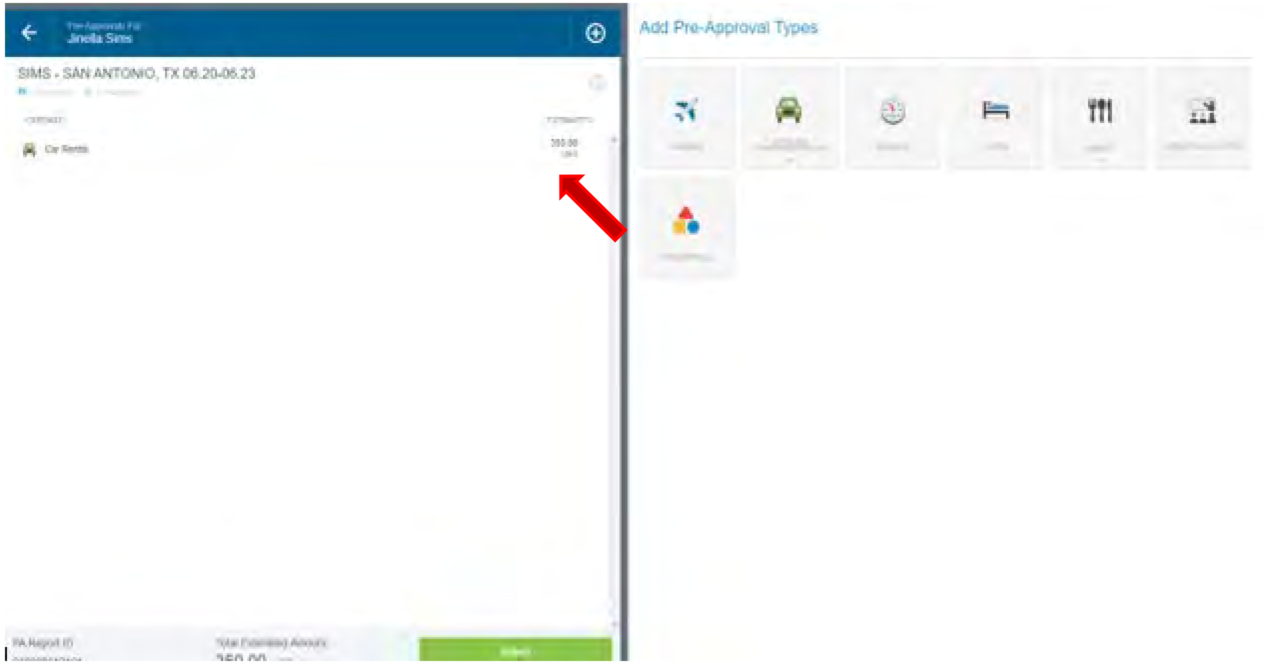
If the Pre-Approval Type tile has an arrow that signifies there are subcategories for that expense type, you select the necessary tile and enter the information.

TRANSPORTATION

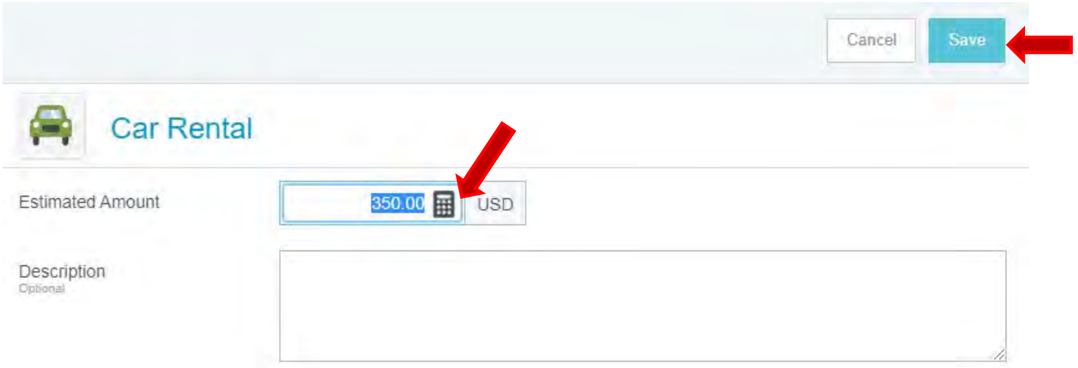
Select "Ground Transportation" type more options will appear. Select the appropriate tile for your transportation of choice.



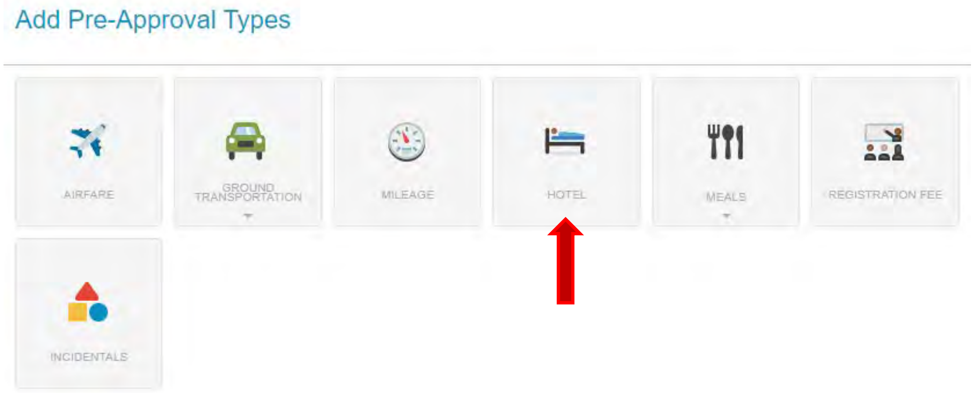
The travel type and estimate will appear on the left-hand side of your screen.



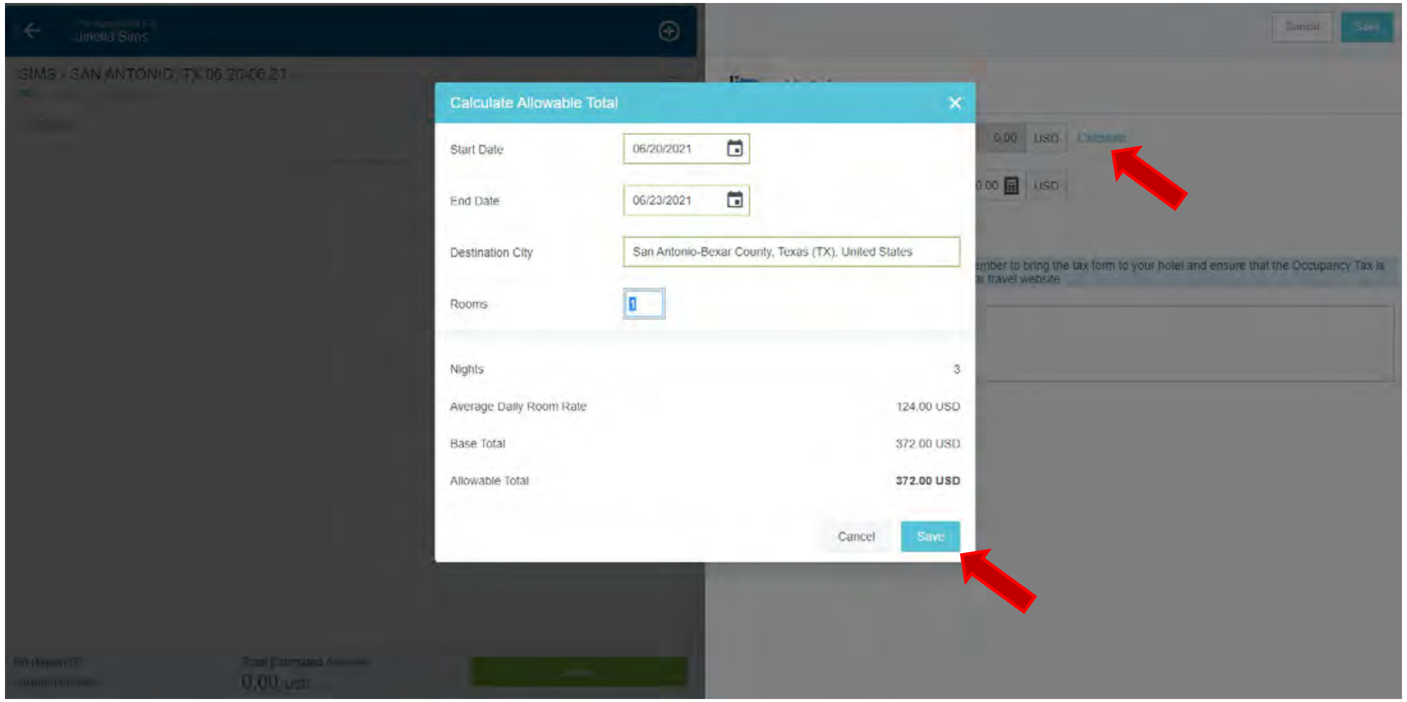
Enter the estimated amount and click "Save".



LODGING



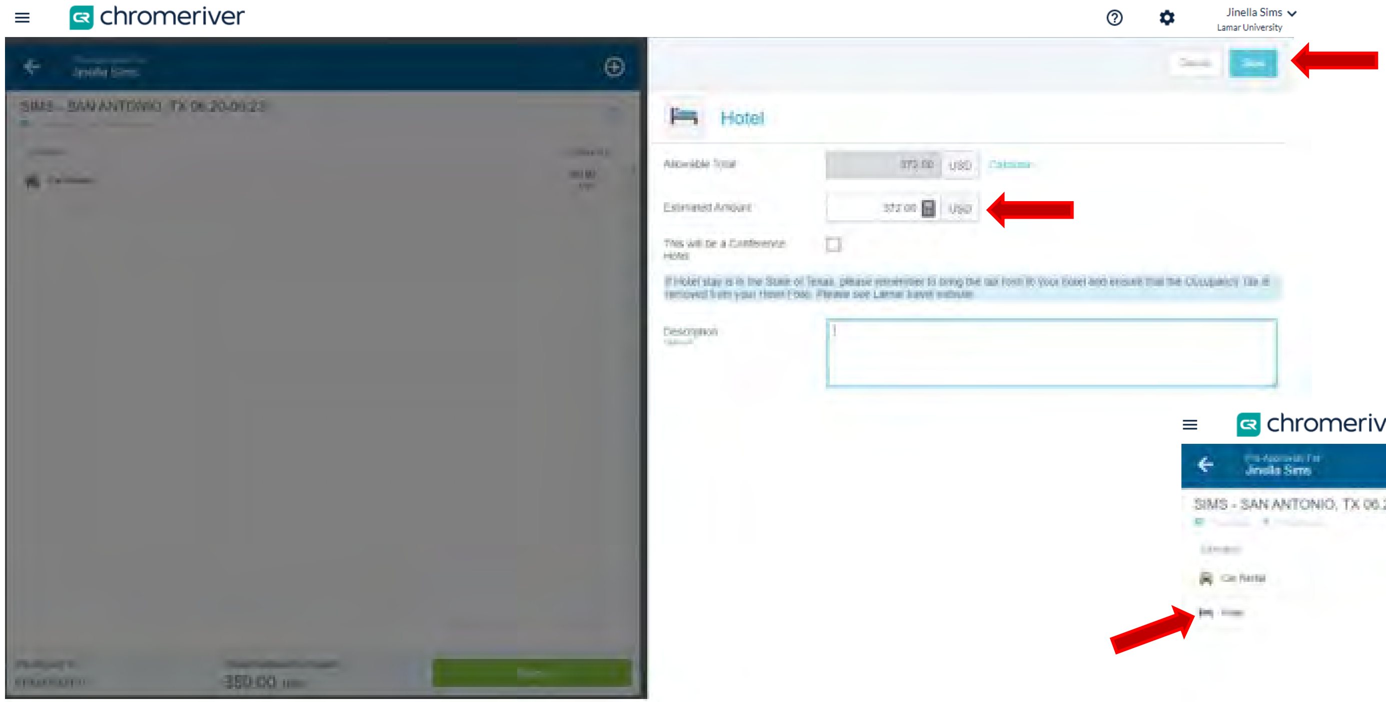
Click “Hotel” type from the pre-approval type screen.

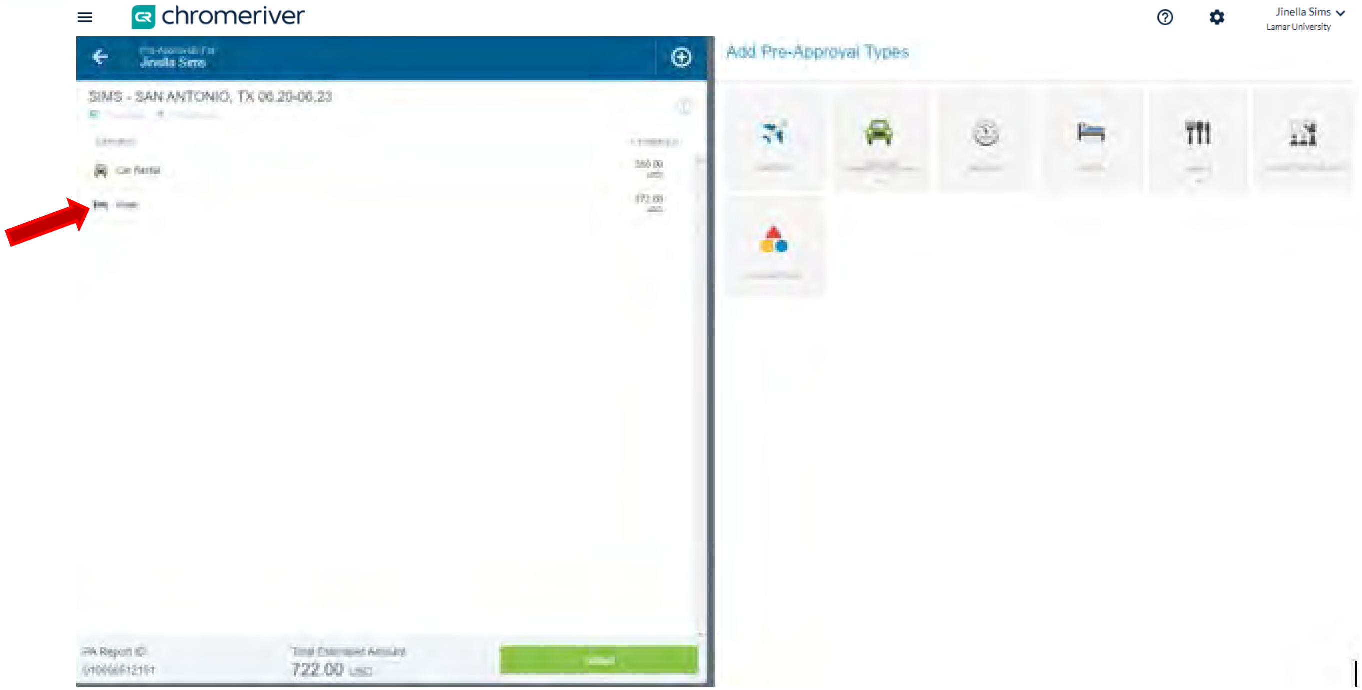


Click “Calculate” to retrieve the current GSA amount for lodging at your destination. The “Calculate Allowable Total” box will appear. Enter “Start Date” and “End Date”. After entering remaining requested information click “Save”.

*If your destination city doesn’t appear, try looking for the county.

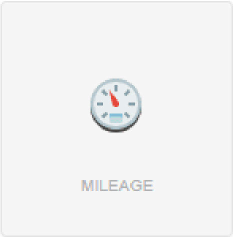
When you come to the next screen enter the estimated amount for the hotel and click "Save". Your hotel estimate amount will then populate to the left of the screen. The hotel rate does not include hotel taxes. Be sure to include hotel taxes under incidental expenses.



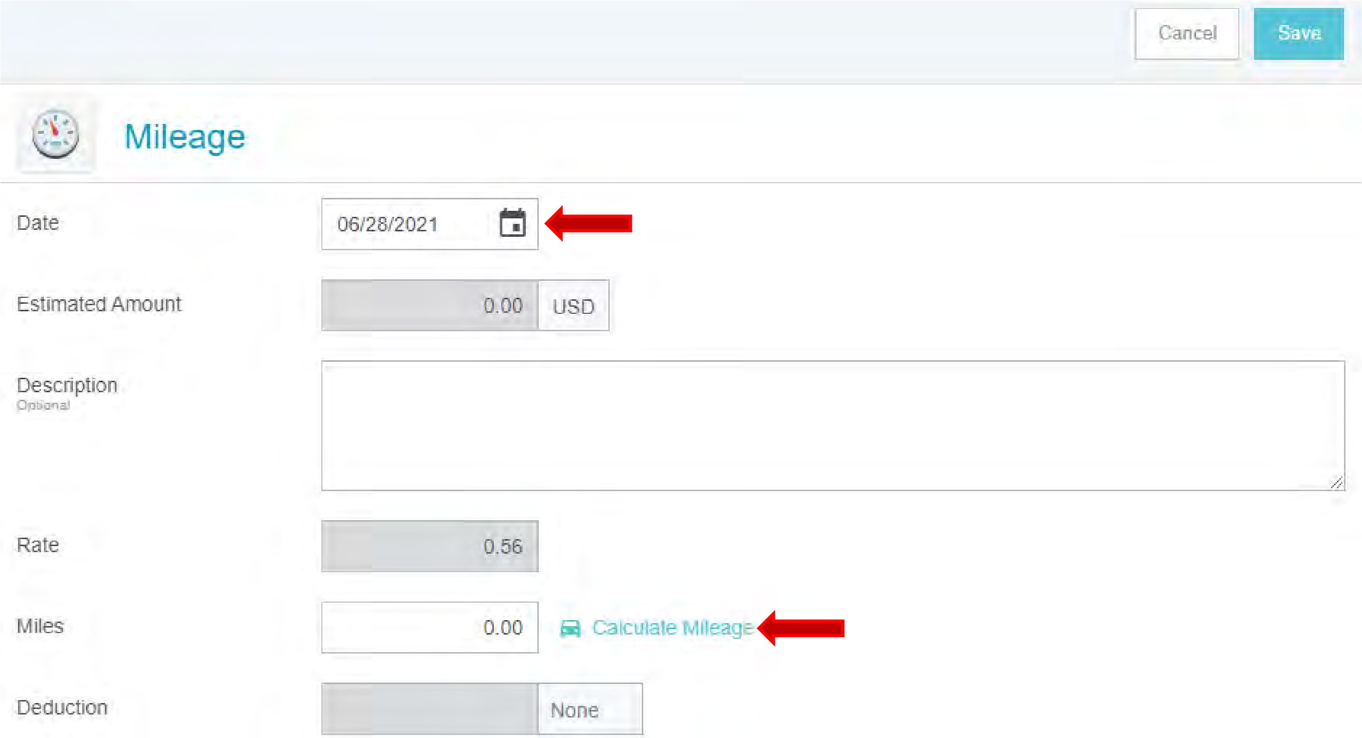


MILEAGE

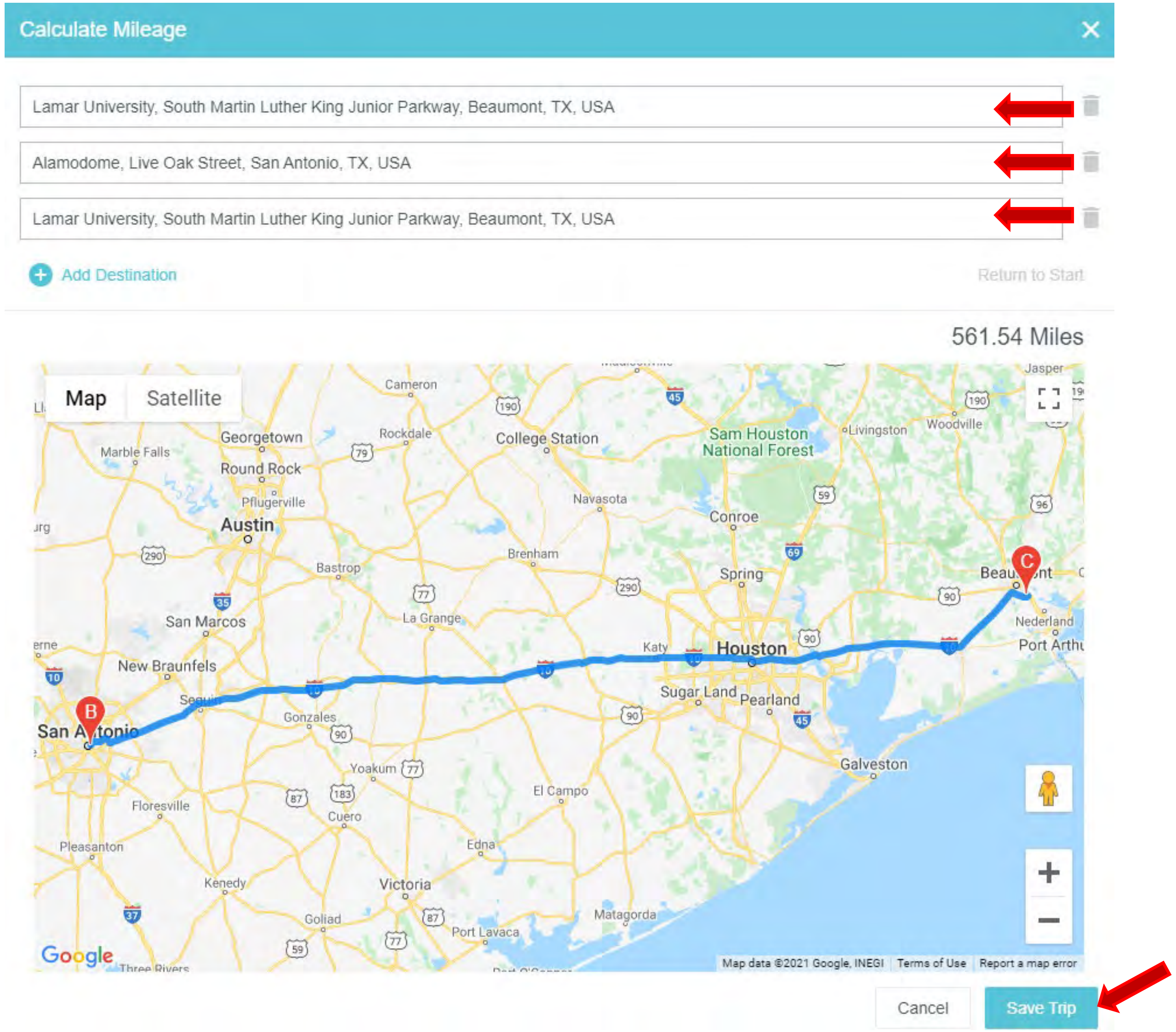
Select the mileage pre-approval type, you will be taken to the mileage screen.



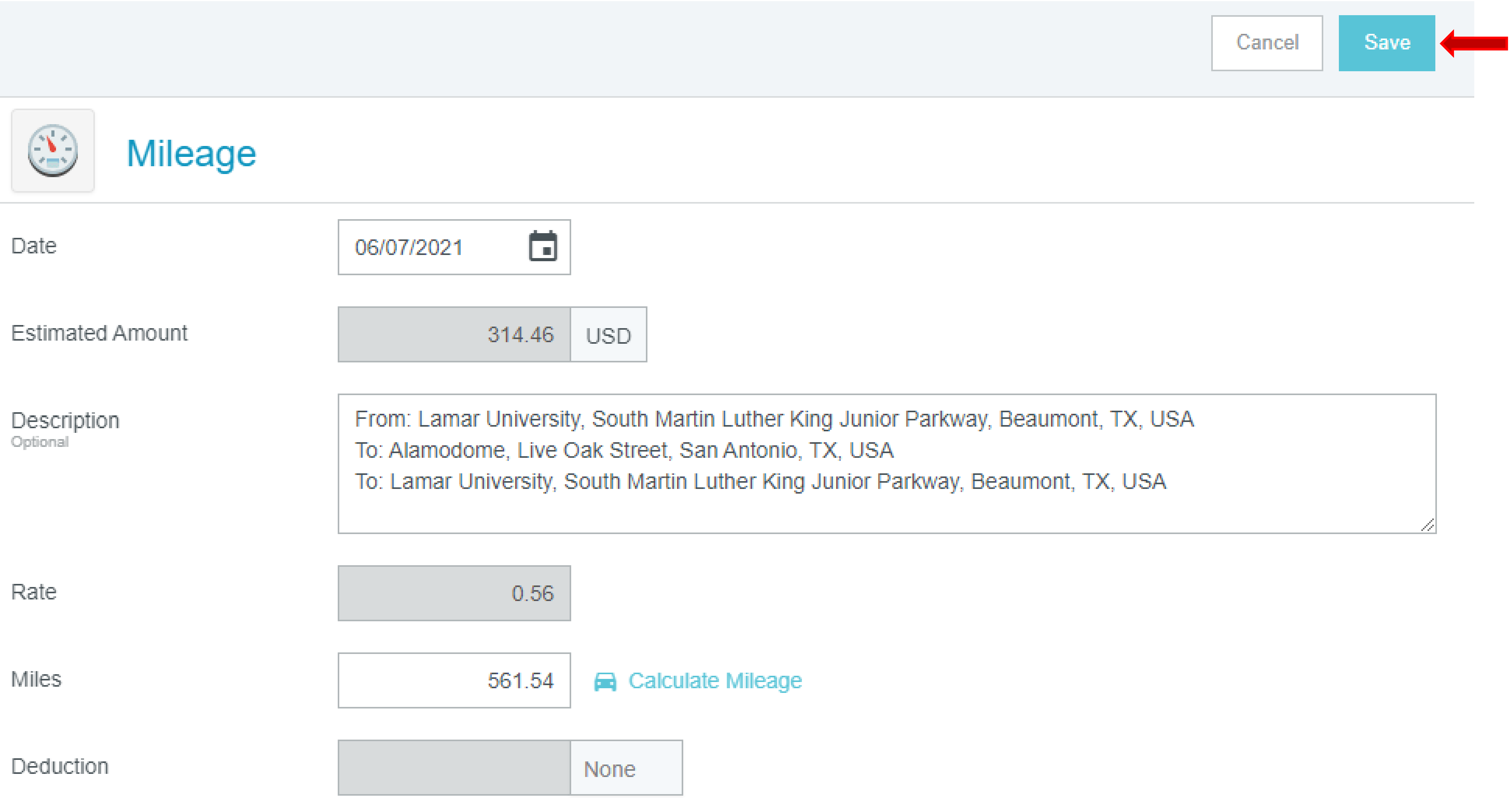
Enter your start of travel date. Use the "Calculate Mileage" option. This option calculates the rate automatically.



On the “Calculate Mileage” screen enter your departing city and your destination and return to city. Select “Save Trip” once finish. The “Return to Start” option will populate the departing city automatically if selected.

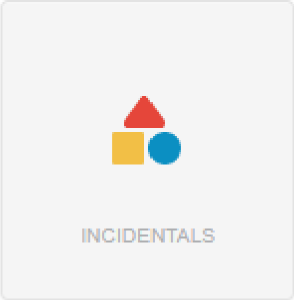


The estimated mileage will populate on the next screen, with the description of the miles traveled. Click "Save".

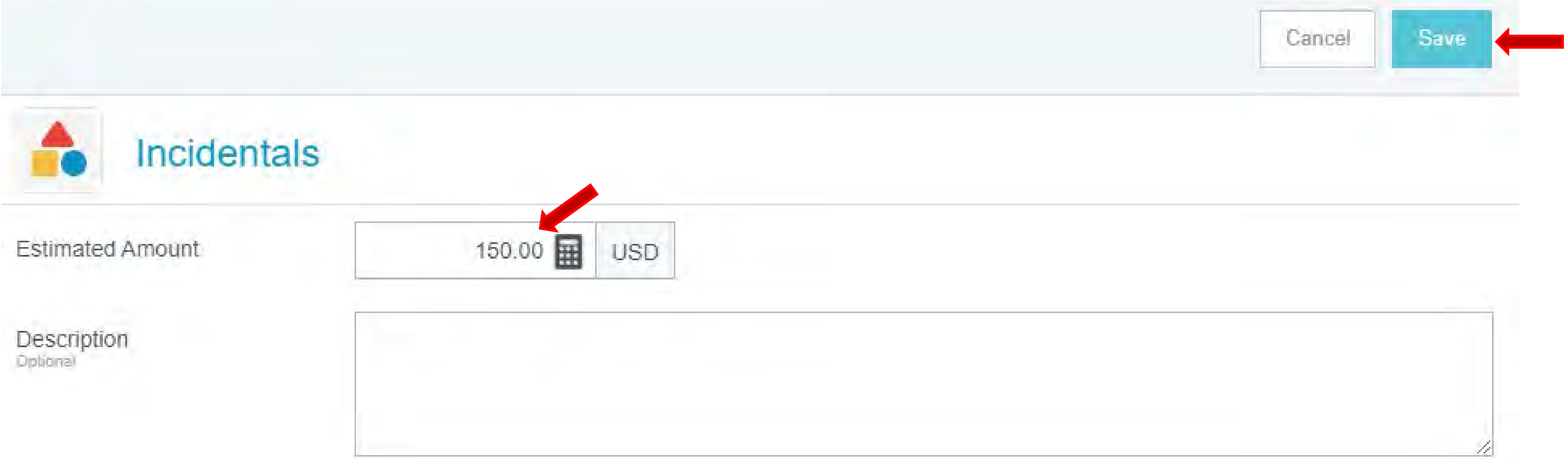


INCIDENTALS

From “Pre-Approval Types” select “Incidentals”.

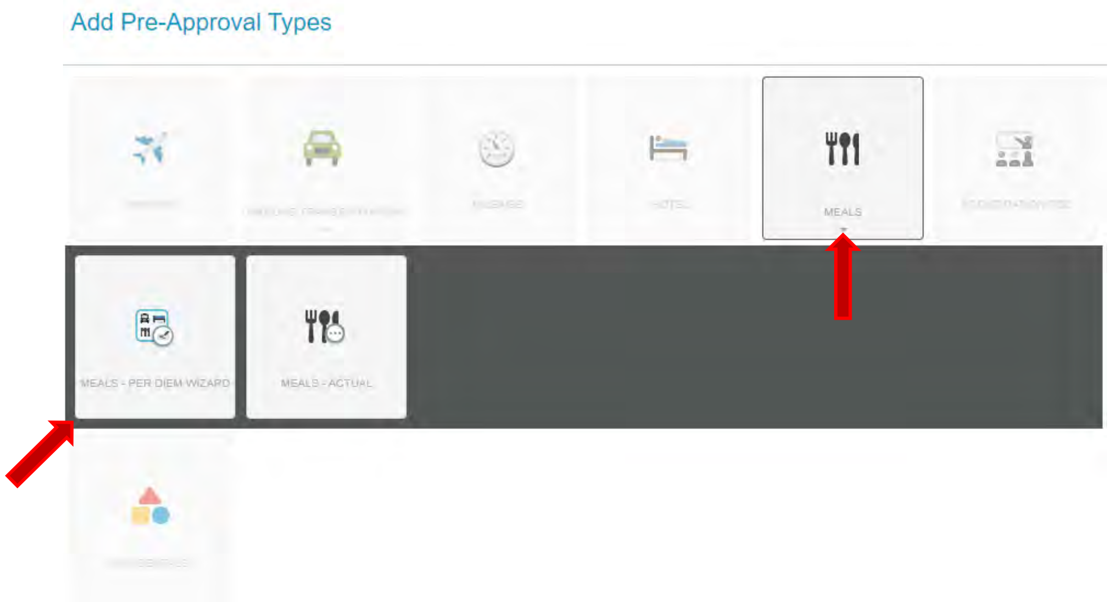


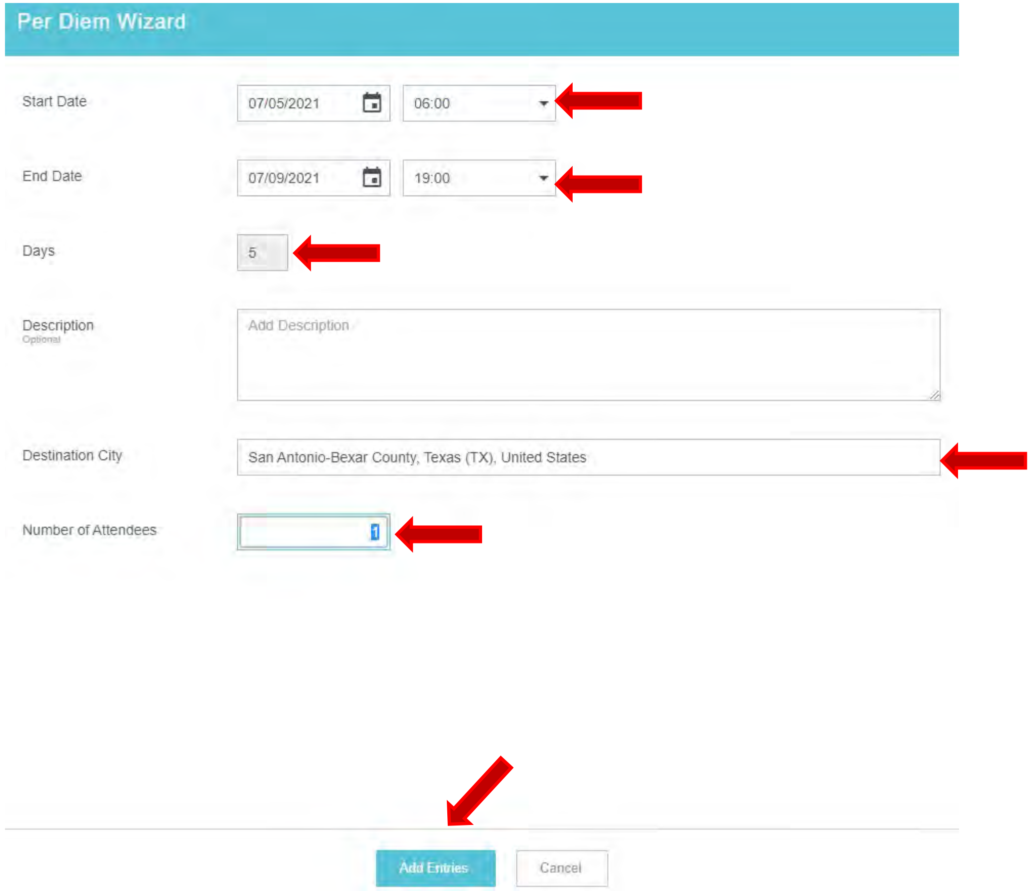
When entering the estimated amount for incidentals consider any hotel taxes, parking, and baggage. Click “Save”.



PER DIEM

Select “Meals” pre-approval types and then the “Meals-Per Diem Wizard”.

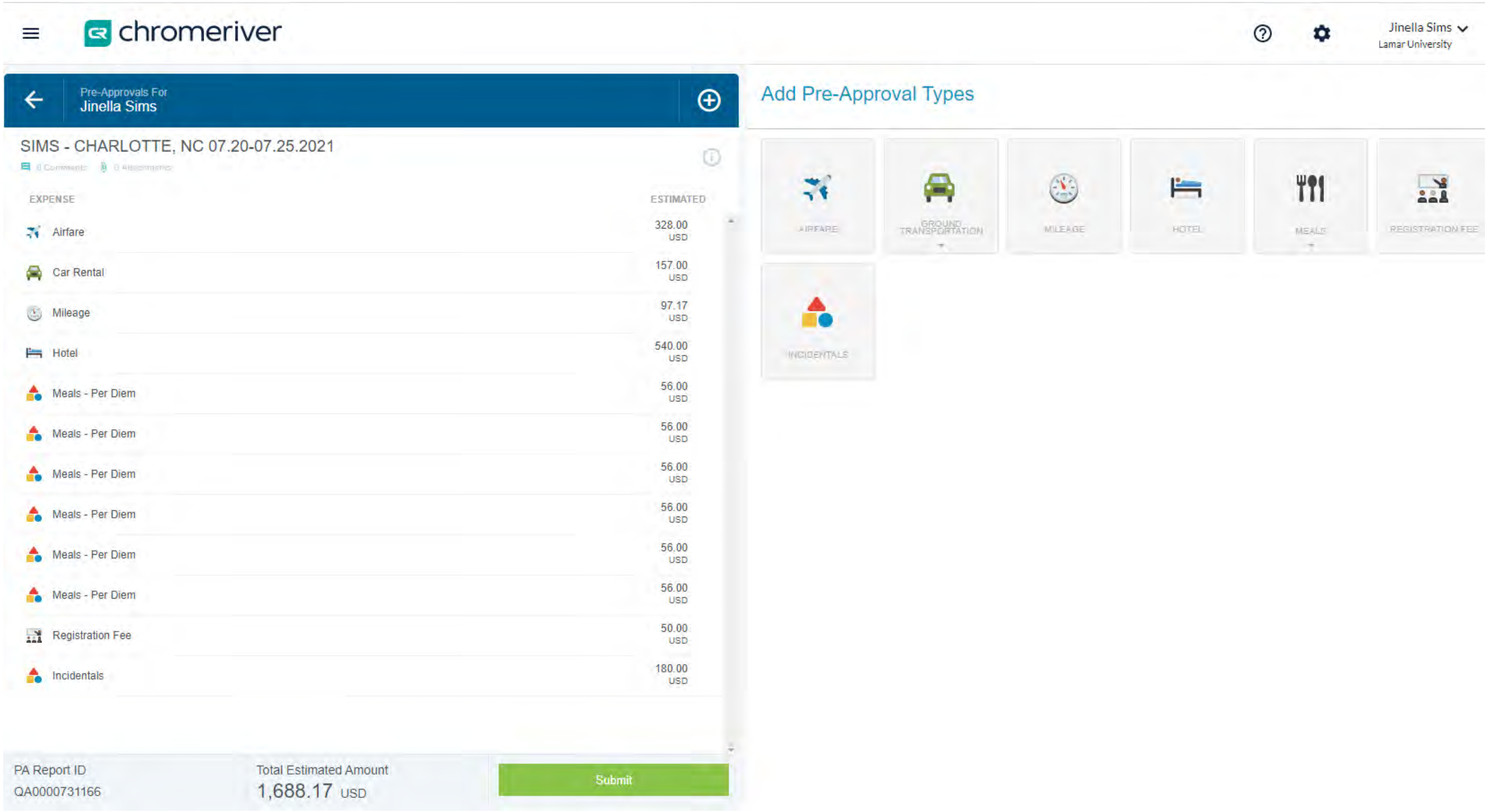




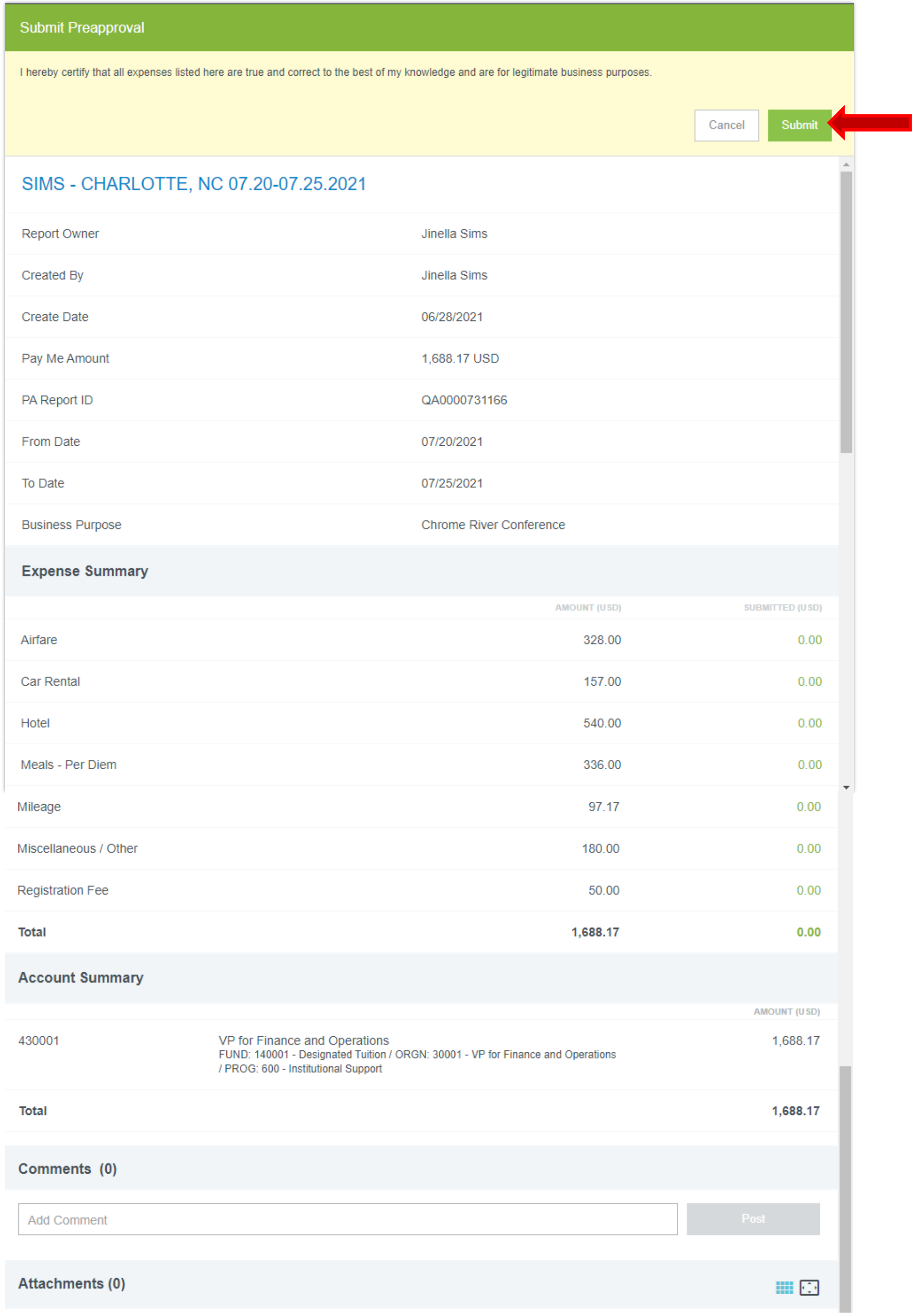
Complete all requested information. Click “Add Entries” and the per diem information will be added to your report.

SUBMITTING A PRE-APPROVAL

Once all expenses are entered review your list on the left of the screen and if you approve, click “Submit.” *If warnings appear you must correct the expense or enter information to validate the expense. If violations appear you must correct the expense before you can proceed.



Please read the acknowledgement that appears. If you agree, click "Submit". The Pre-Approval will then go through the necessary approval steps starting with budget.


Submit Preapproval

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 Submit

SIMS - CHARLOTTE, NC 07.20-07.25.2021

Report Owner	Jinella Sims
Created By	Jinella Sims
Create Date	06/28/2021
Pay Me Amount	1,688.17 USD
PA Report ID	QA0000731166
From Date	07/20/2021
To Date	07/25/2021
Business Purpose	Chrome River Conference

Expense Summary

	AMOUNT (USD)	SUBMITTED (USD)
Airfare	328.00	0.00
Car Rental	157.00	0.00
Hotel	540.00	0.00
Meals - Per Diem	336.00	0.00
Mileage	97.17	0.00
Miscellaneous / Other	180.00	0.00
Registration Fee	50.00	0.00
Total	**1,688.17**	**0.00**

Account Summary

		AMOUNT (USD)
430001	VP for Finance and Operations FUND: 140001 - Designated Tuition / ORGN: 30001 - VP for Finance and Operations / PROG: 600 - Institutional Support	1,688.17
Total		**1,688.17**

Comments (0)

Add Comment Post

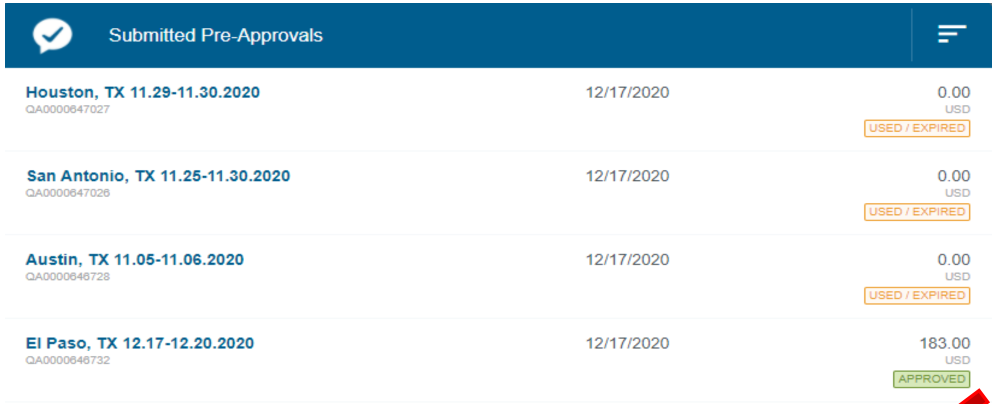
Attachments (0)

TRACKING A PRE-APPROVAL

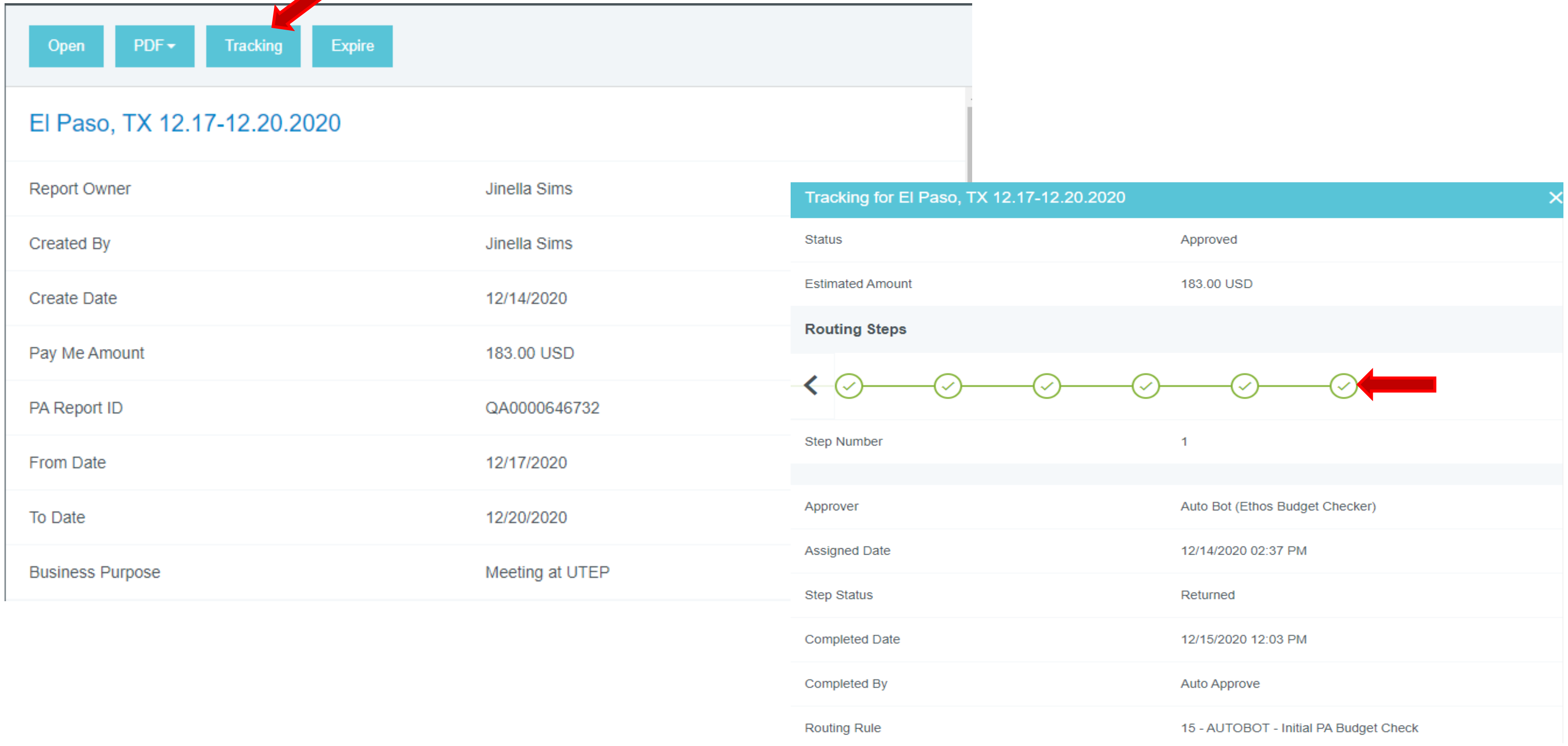
To track Pre-Approvals after submission, return to your dashboard and click on the Pre-Approval "Submitted" option

You will then be brought to a list of your submissions and will be able to see the approval status of submitted pre-approvals.

At the submitted Pre-Approvals list click on the status report to the right.



Then click “Tracking” the routing steps and who is assigned to approve will appear.

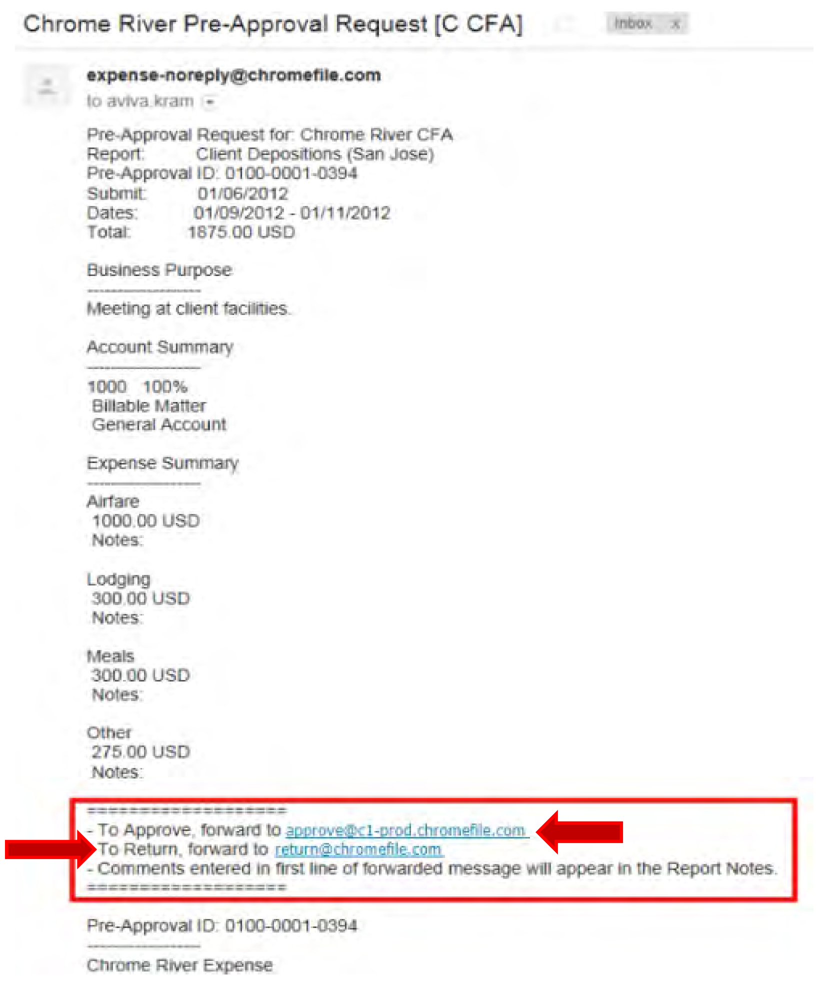


*If your pre-approval is returned due to budget, check your funding and resubmit.

APPROVALS BY EMAIL OR IN THE APP

APPROVING BY EMAIL

Approvers will be notified by email of submitted reports needing responses. The approver has the option to approve or return the request. At the bottom of the email, you will find the approve and return forwarding email. Selecting the appropriate email response and you have the option to add notes, if needed.


Chrome River Pre-Approval Request [C CFA]

expense-noreply@chromefile.com
to aviva.kram

Pre-Approval Request for: Chrome River CFA
Report: Client Depositions (San Jose)
Pre-Approval ID: 0100-0001-0394
Submit: 01/06/2012
Dates: 01/09/2012 - 01/11/2012
Total: 1875.00 USD

Business Purpose
Meeting at client facilities.

Account Summary
1000 100%
Billable Matter
General Account

Expense Summary
Airfare
1000.00 USD
Notes:

Lodging
300.00 USD
Notes:

Meals
300.00 USD
Notes:

Other
275.00 USD
Notes:

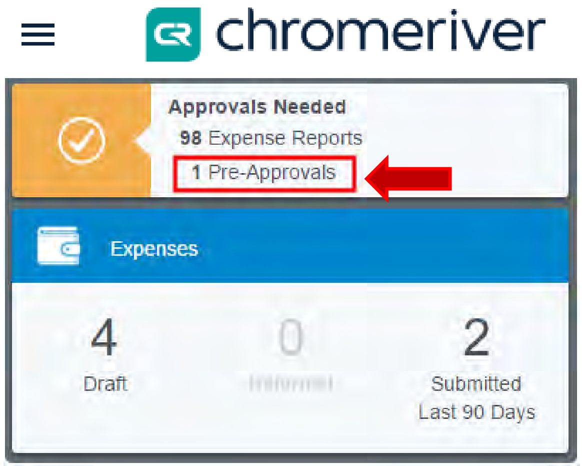
====================
- To Approve, forward to approve@c1-prod.chromefile.com
To Return, forward to return@chromefile.com
- Comments entered in first line of forwarded message will appear in the Report Notes.
====================

Pre-Approval ID: 0100-0001-0394

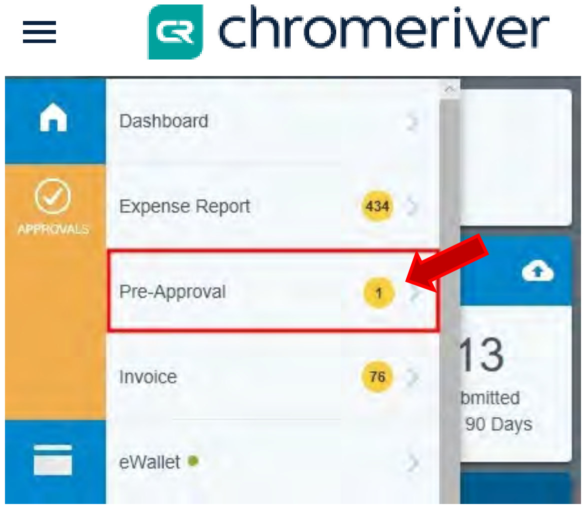
Chrome River Expense

APPROVING IN APP

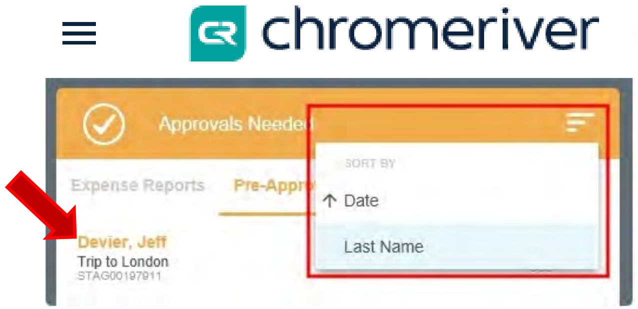
Approval notifications populate on your notification bar.
Click, “Pre-Approvals”.



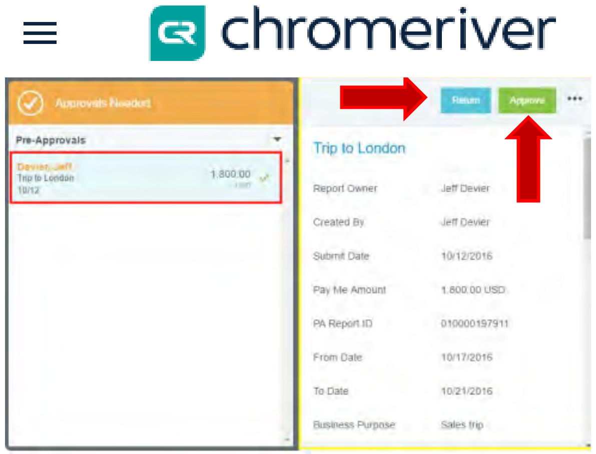
Your pending Pre-Approvals can also be accessed by clicking the “MENU” button and selecting “Pre-Approval”. The yellow circle indicates the amount.



This will bring up the pending approval list.



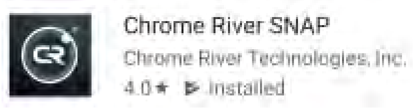
A list will display all awaiting pre-approvals. Click on the approval you want to view, and a preview will appear to the right allowing you to return or approve.



SCAN AND SEND RECEIPTS

You also have the option to install the Chrome River App to your phone. Chrome River is compatible with both Android and IOS devices.

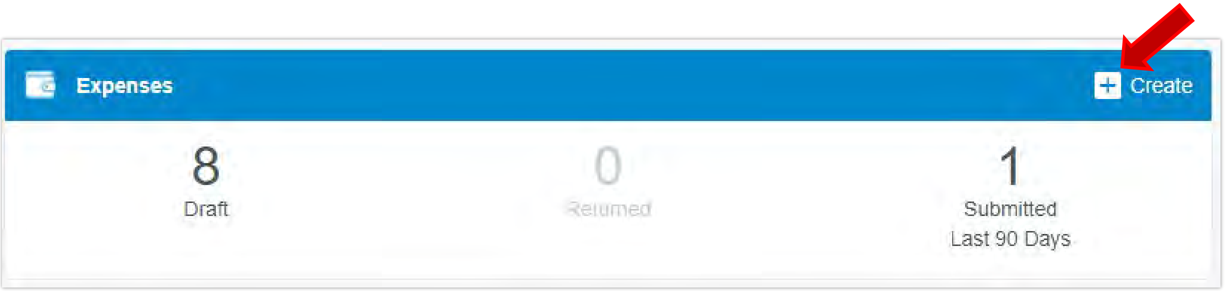
Be sure to download CR SNAP from the App Store or Play Store for your device. CR SNAP is compatible with Android and IOS devices. This app will capture and upload receipt images right when the expense occurs once you snap a photo of the receipt. The receipt will then upload directly to the "Receipt Gallery" in Chrome River.



If you prefer not to use the Chrome River SNAP App, please follow the directions below.

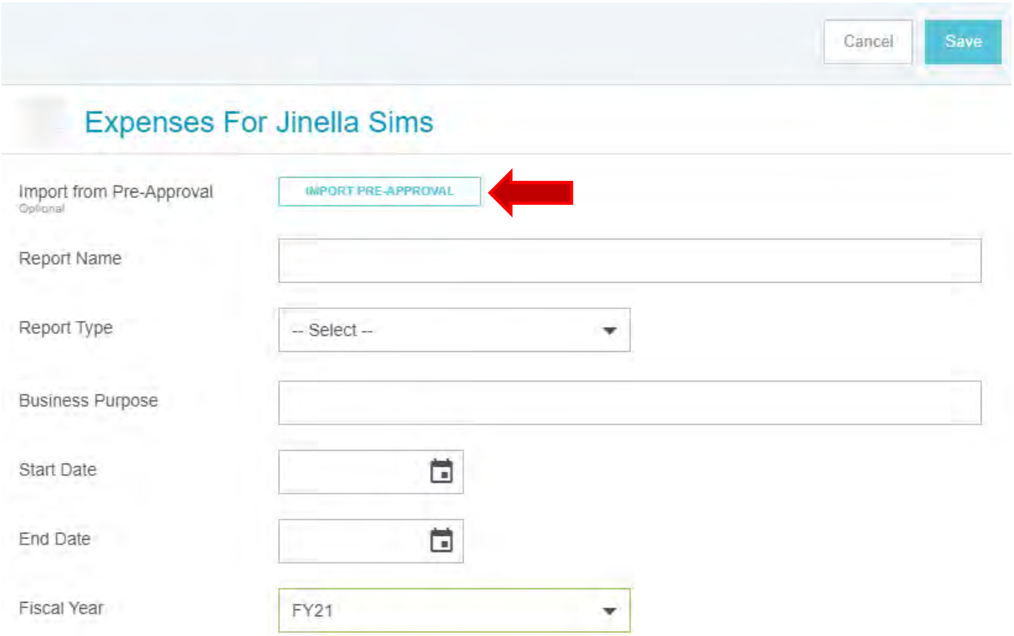
Use the "Snap and Send" feature to quickly load receipt images to your account. Simply take a photo of one or more receipts and email them to receipt@cal.chromeriver.com. The receipts will then be available within your Receipt Gallery in Chrome River. Be sure to send the email from an email account that is registered with Chrome River. Your company email address is already registered, and you can easily add other addresses via the Preferences menu.

CREATING AN EXPENSE REPORT



On your dashboard click the "+" to create a new expense report.

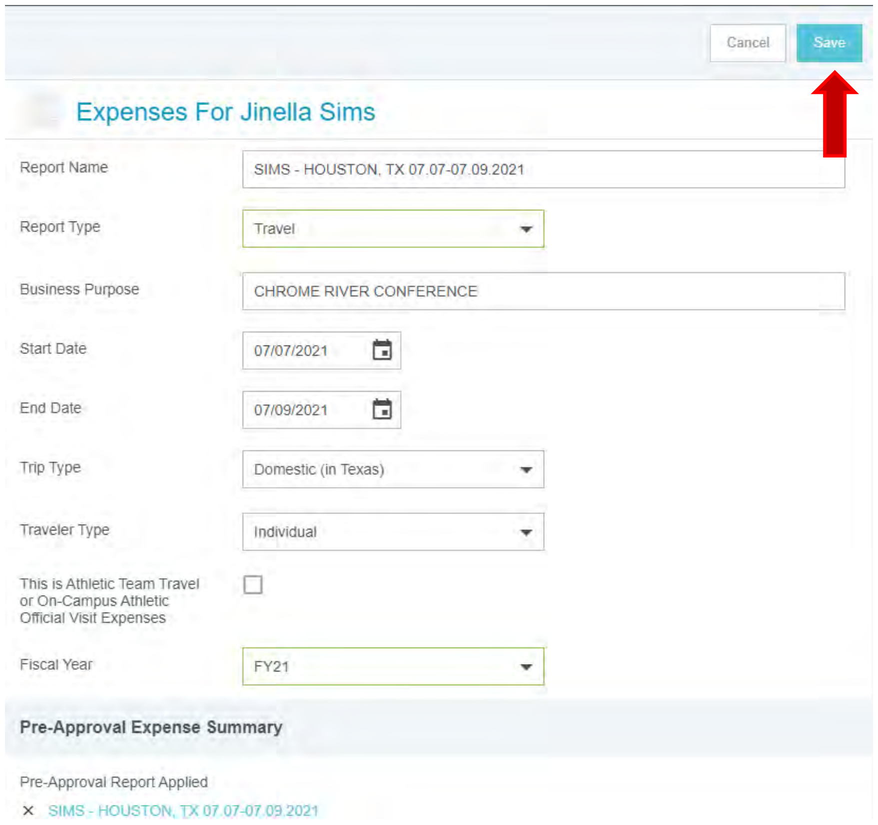
Click "Import Pre-Approval" if you have a Pre-Approval for your trip. If you choose "Import Pre-Approval" a drop-down box of Pre-Approval reports will appear, select the appropriate report.

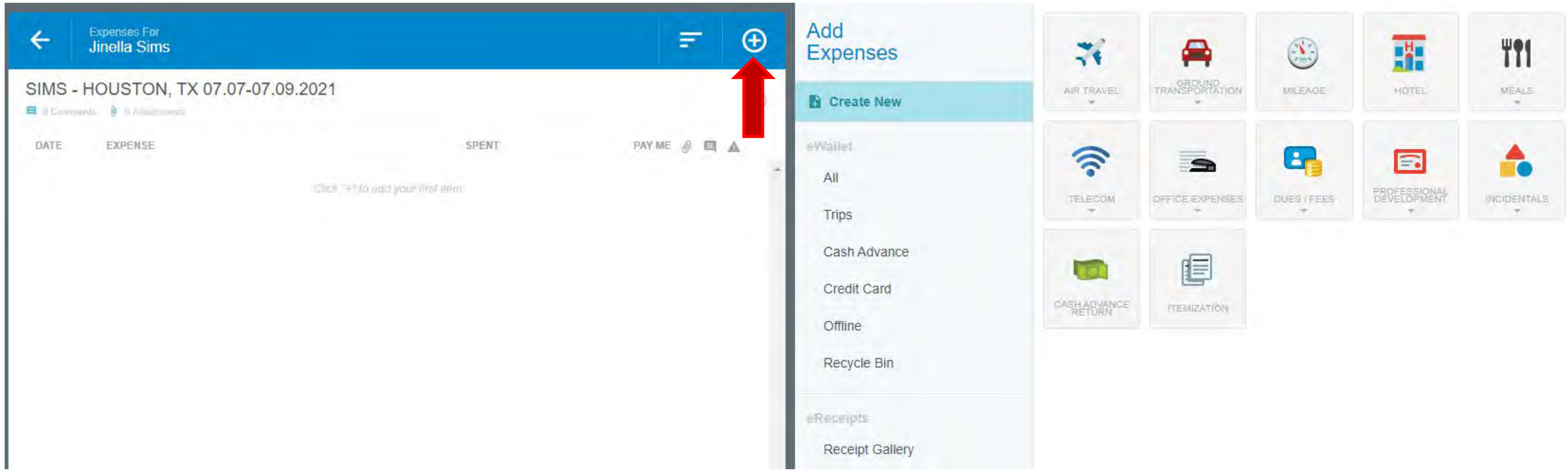


*In rare occasions if you do not have a Pre-Approval skip the import step and manually add the required information in the boxes listed and then click save.

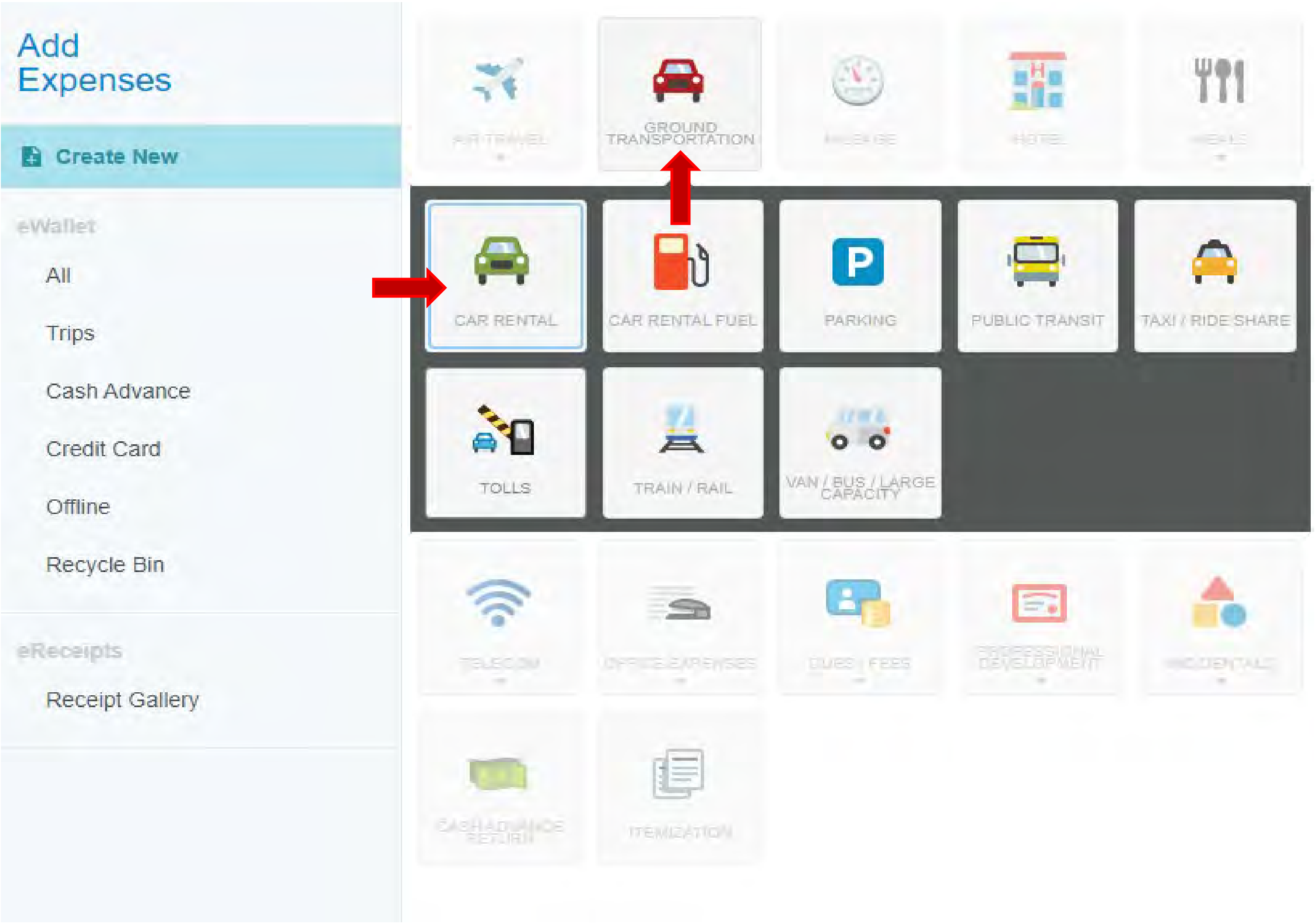
The report information will populate. Please review and click "Save."

Imported Pre-Approval amounts will appear to the left of the screen. If the expenses do not populate you will click on the individual tiles and add your expenses to your report. Clicking on the blue bar (+) will make the expense tiles appear.

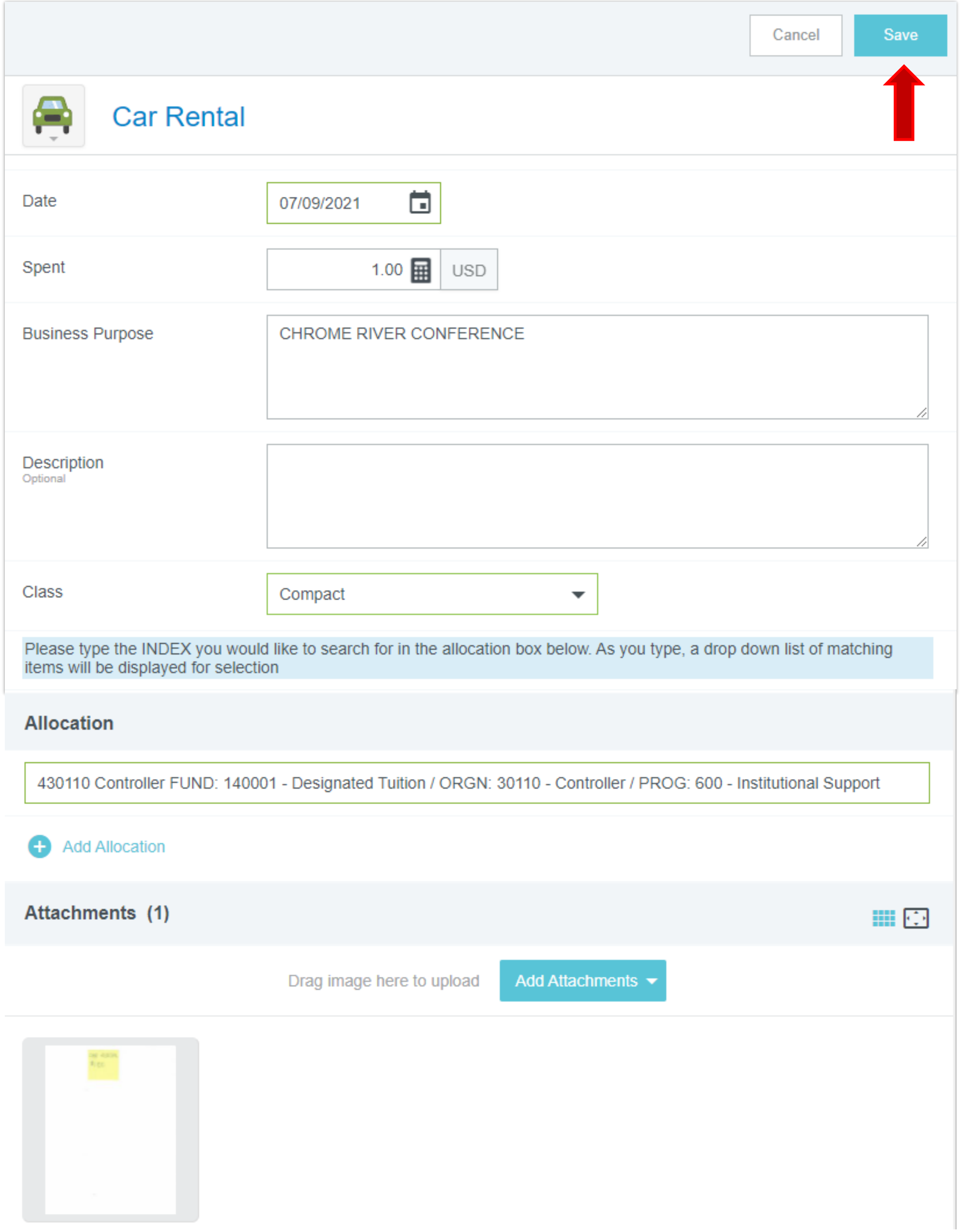




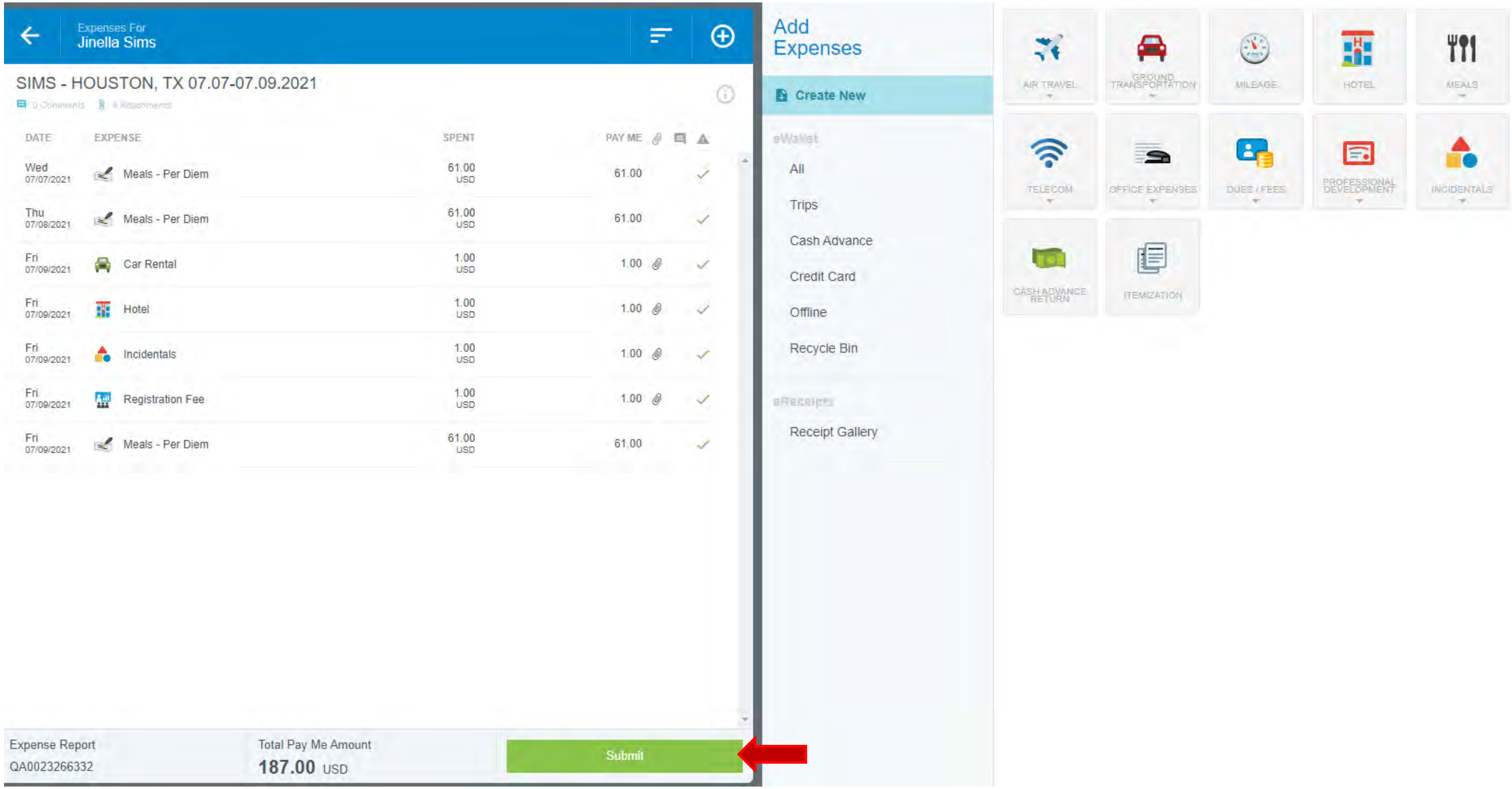
In this instance the pre-approval amounts did not appear to the left of the screen. Select the first expense you would like to add to the report.



Be sure the date is the first date of your trip, or the date located on the receipt. You will then scroll down and make sure the “Allocation’ is correct. To add receipts, click on “Add Attachments” to upload. This will give you the option to upload receipts from your “Receipt Gallery” or upload from your computer. Once selection is made, click “Save”. This step will be completed for each expense.



Review and delete any items not associated with your trip expenses. Green checks to the right of the expenses indicate there are no issues and you can proceed to submit. If **warnings** appear you must correct the expense or enter information to validate the expense to proceed with submitting. If **violations** appear you must correct the expense before you can proceed. Click “Submit”.



Submit Confirmation

I hereby certify that all expenses being paid or reimbursed by the University are valid and comply with University policy. I affirm that all expenses claimed for reimbursement were paid with personal funds and have not been previously reimbursed through a submitted expense report or by an outside agency or third party.

Pre-Approval Applied: SIMS - HOUSTON, TX 07.07-07.09.2021 [Remove]

Available Balance: 187.00 USD

Cancel Submit

If you agree with the acknowledgement, click "Submit".

You have the option to scroll and review the expense report for a second time.

SIMS - HOUSTON, TX 07.07-07.09.2021

Report Owner	Jinella Sims *Payment Specialist Senior*
Expense Report ID	QA0023266332
Business Purpose	CHROME RIVER CONFERENCE

Financial Summary

	AMOUNT (USD)	APPROVED (USD)
Total Expense Reported	187.00	0.00
Amount Due Employee	187.00	0.00

Applied Pre-Approval Report

DATE	REPORT NAME		AMT (USD)
07/06/2021	SIMS - HOUSTON, TX 07.07-07.09.2021	PDF	0.00
Remaining Balance			**187.00**

Expense Summary

	AMOUNT (USD)	APPROVED (USD)
Car Rental	1.00	0.00
Hotel	1.00	0.00
Incidentals	1.00	0.00
Meals - Per Diem	183.00	0.00
Registration Fee	1.00	0.00
Total	**187.00**	**0.00**

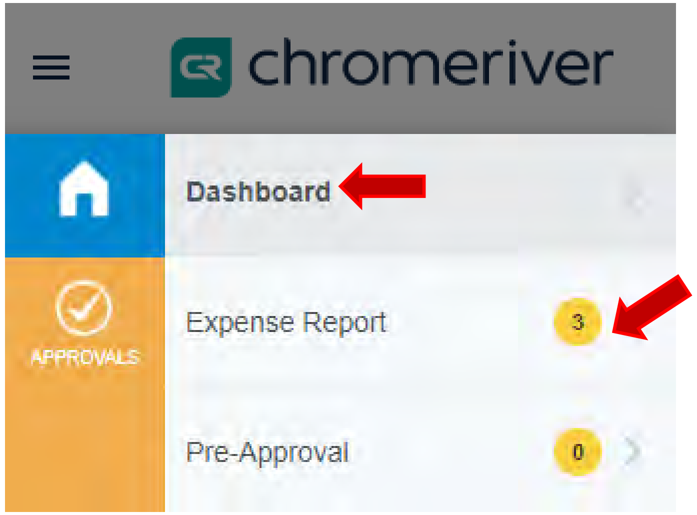
Account Summary

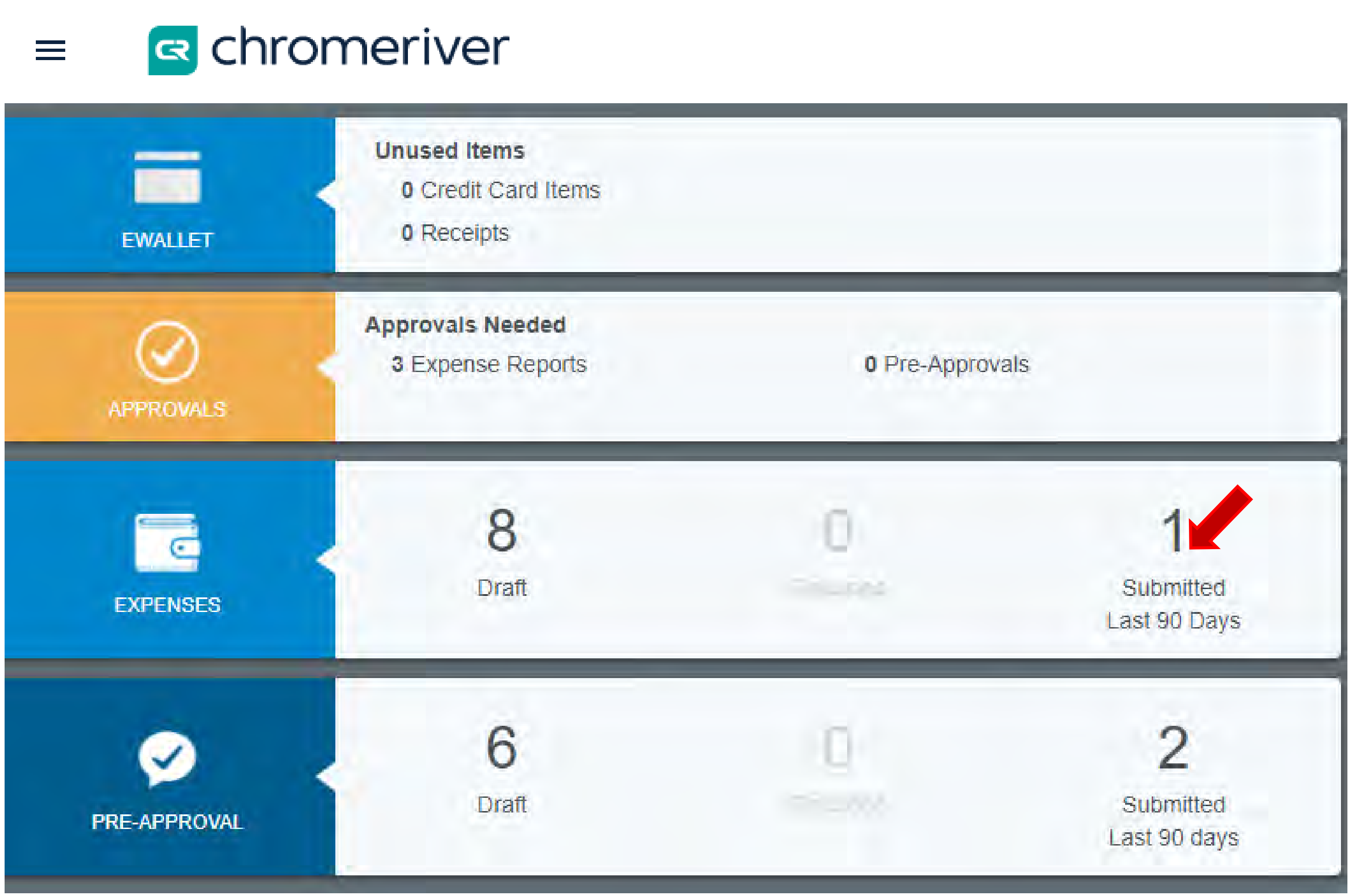
		AMOUNT (USD)	APPROVED (USD)
430110	Controller FUND: 140001 - Designated Tuition / ORGN: 30110 - Controller / PROG: 600 - Institutional Support	187.00	0.00
Totals		**187.00**	**0.00**

Attachments (4)

TRACKING AN EXPENSE REPORT

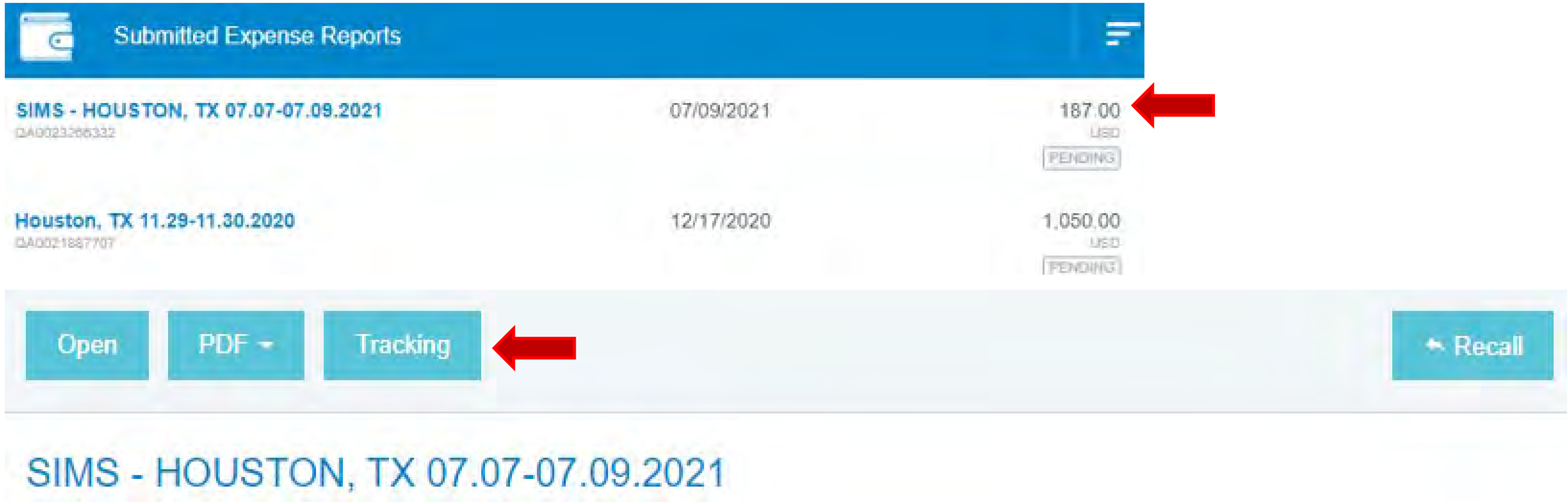
To track an expense report, access your "Dashboard".





From the "Expenses" row, click on the submitted reports in the last 90 days.

A list of recently submitted reports will appear. Select the report you want to track.



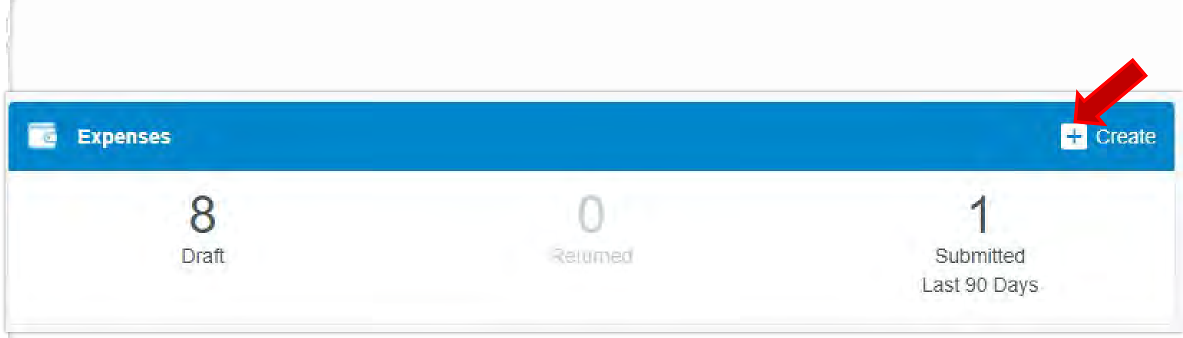
Click, on “Tracking”.

Under currently assigned, the name of the next approver of your expense report will be listed. *If your report is not found under “Submitted Reports”, it is possible that it is in the “Return” column, that can be accessed at your “Dashboard”.

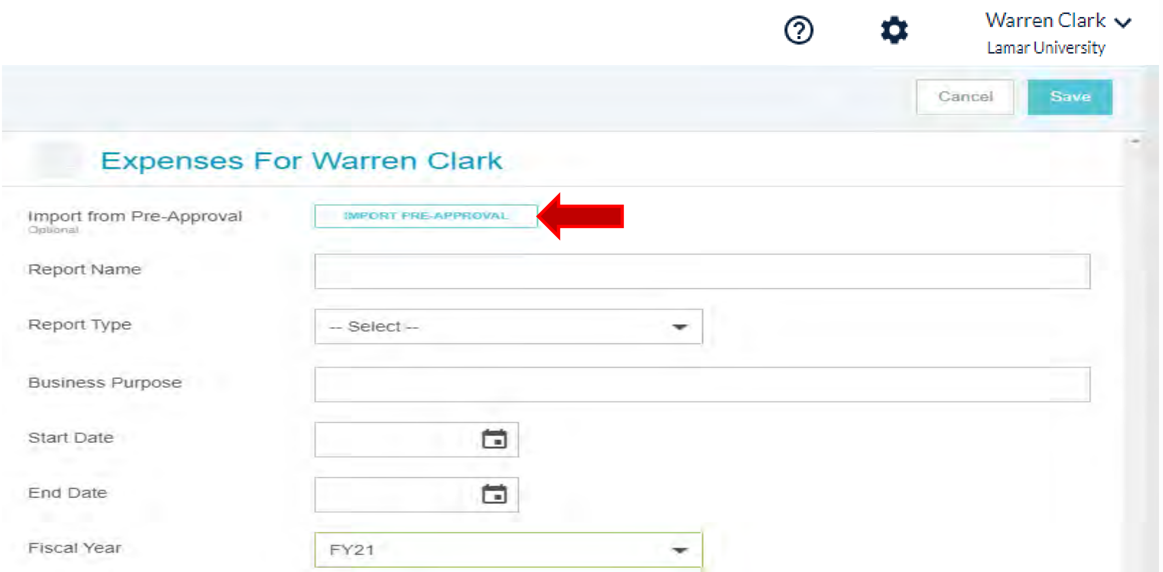
Tracking for SIMS - HOUSTON, TX 07.07-07.09.2021

EXPENSE TYPE	AMOUNT (USD)	STATUS	CURRENTLY ASSIGNED
Meals - Per Diem	61.00	Pending Approval	Jody Thousand
Car Rental	1.00	Pending Approval	Jody Thousand
Incidentals	1.00	Pending Approval	Jody Thousand
Registration Fee	1.00	Pending Approval	Jody Thousand
Hotel	1.00	Pending Approval	Jody Thousand
Meals - Per Diem	61.00	Pending Approval	Jody Thousand
Meals - Per Diem	61.00	Pending Approval	Jody Thousand

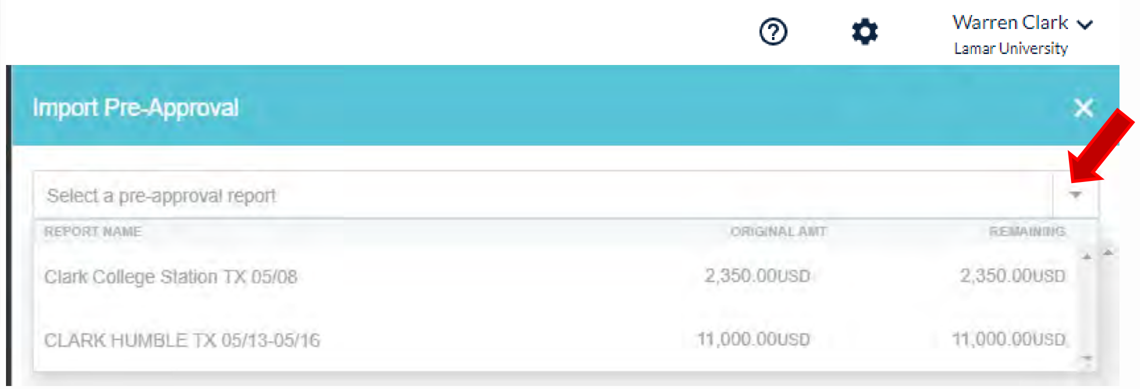
CREATING AN EXPENSE REPORT WITH TRAVEL CARD EXPENSES



This action applies to Athletics. On your dashboard click "+"sign to create a new expense report.

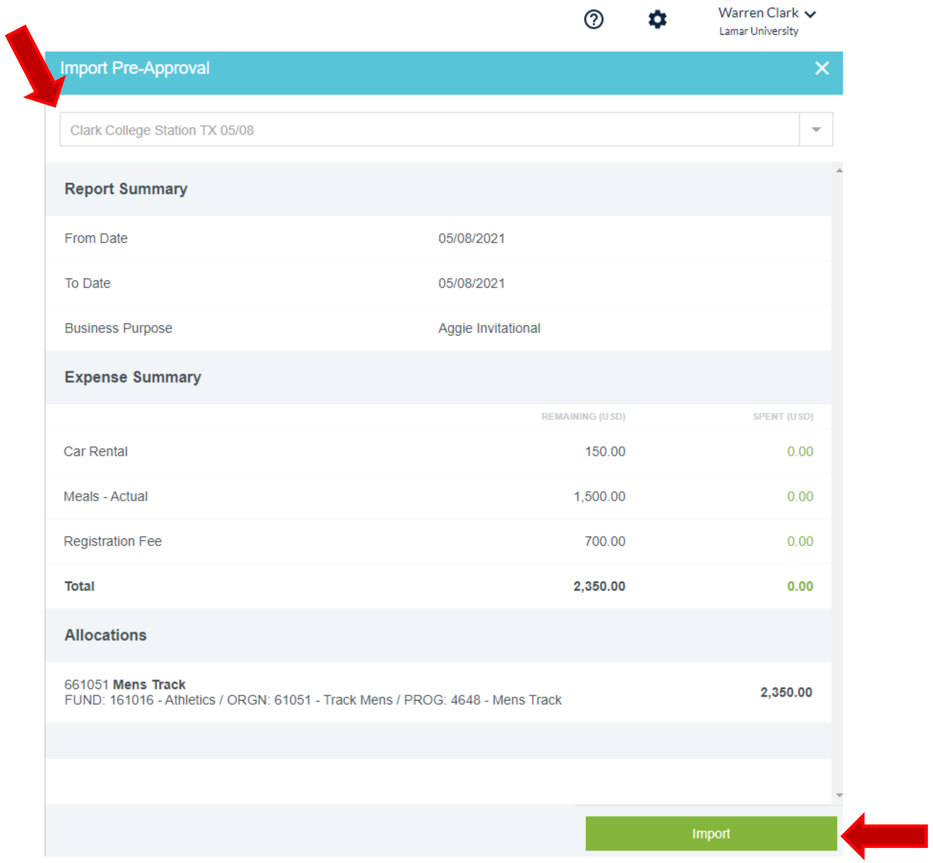


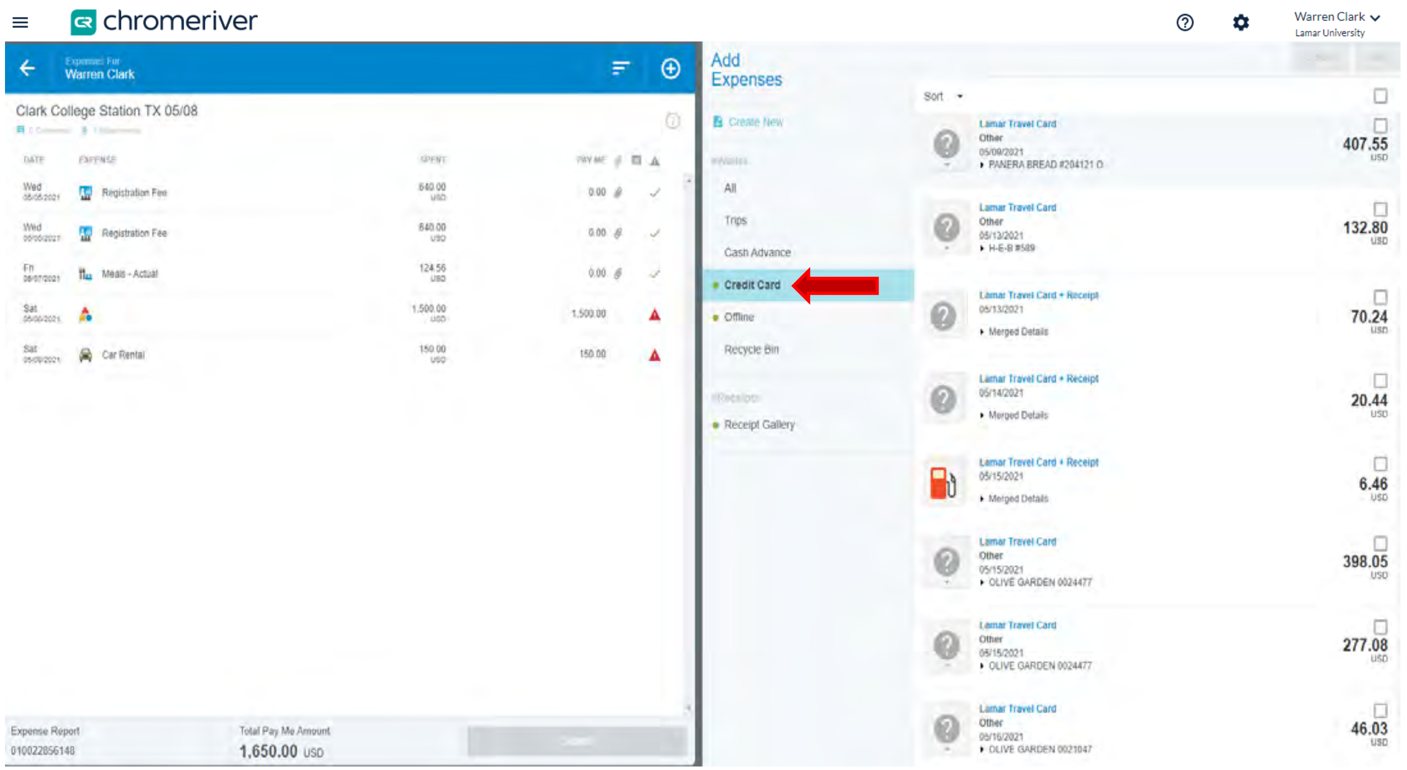
Click "Import Pre-Approval" if you have a Pre-Approval for your trip. If you choose "Import Pre-Approval" a drop-down box of Pre-Approval reports will appear, select the appropriate report.



*In rare occasions if you do not have a Pre-Approval skip the import step and manually add the required information in the boxes listed and then click save.

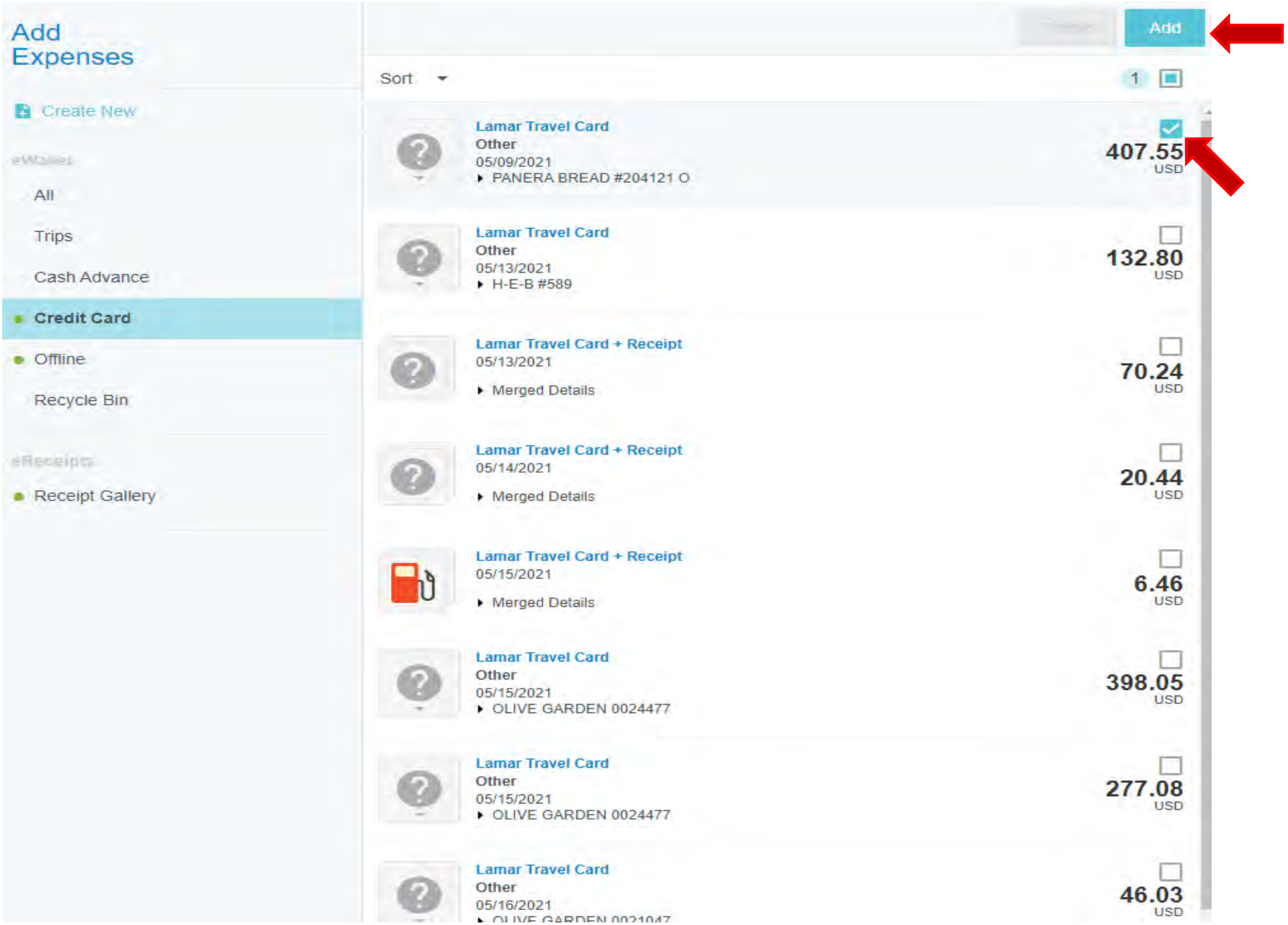
Confirm it is the correct report and click “Import”.



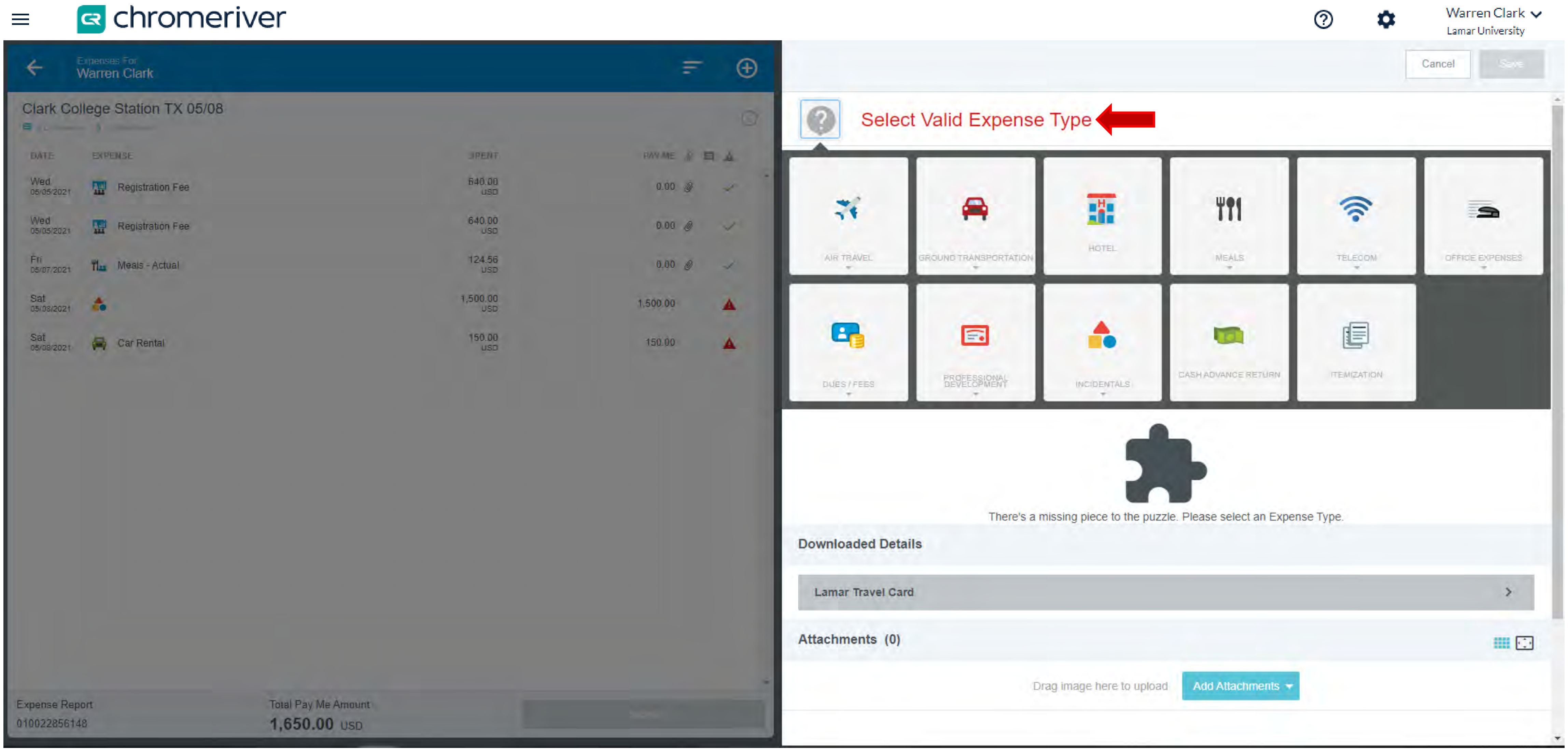


To access your E-Wallet credit card items, click the “+” button and then click, “Credit Card” to see a list of charges. *It may take up to three business days for credit card transactions to appear in Chrome River.

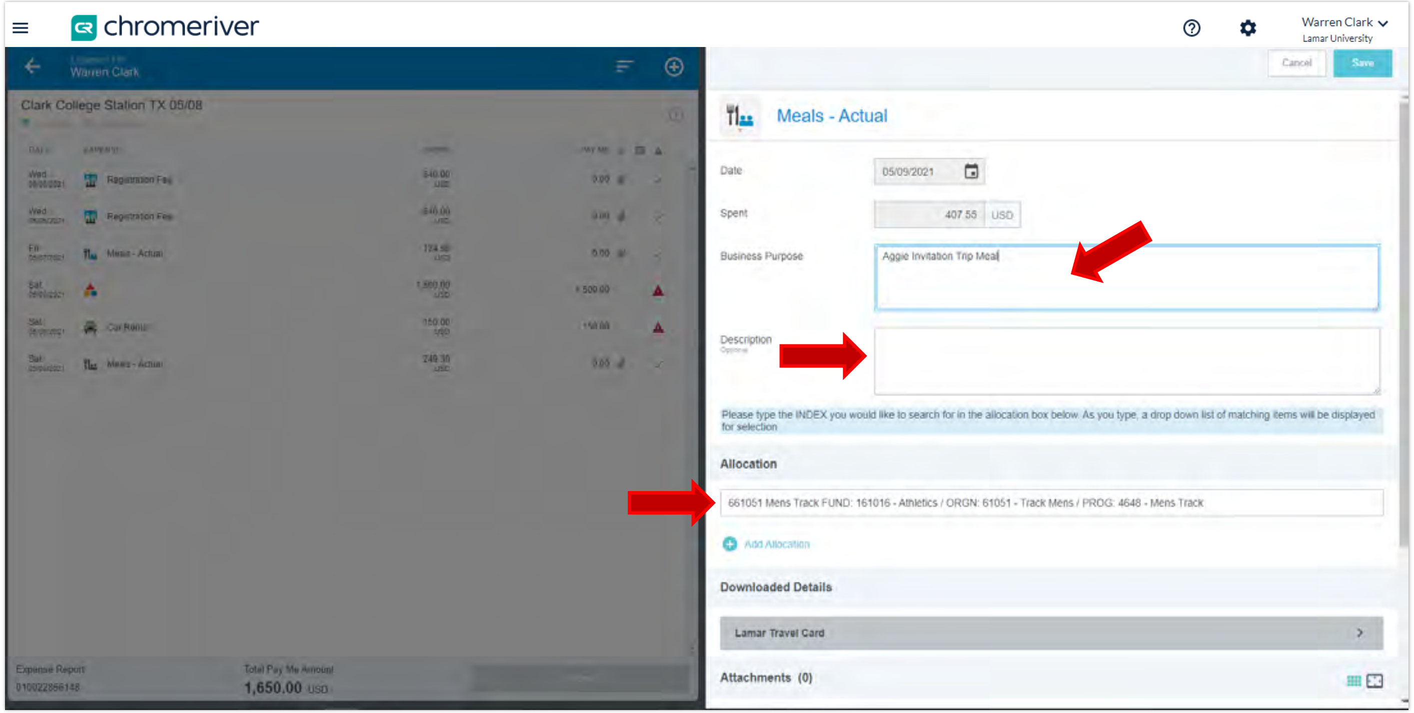
To add the credit card item to a report, click in the box to the right of the charge creating a checkmark. then click, “Add”. More than one charge can be added at a time.



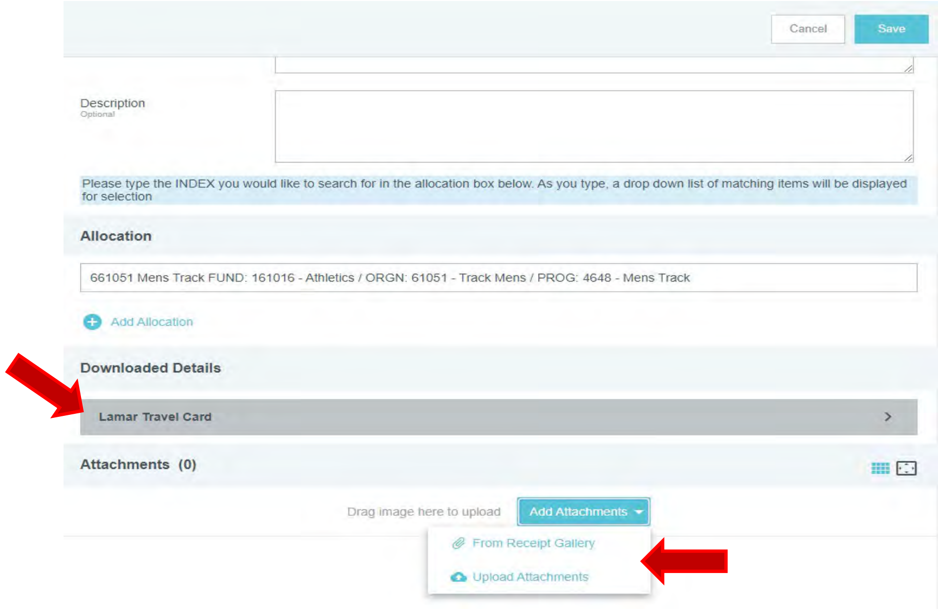
The expense will then be added to the report, but you will need to add details regarding the expense type. Select the tile that applies to the expense.



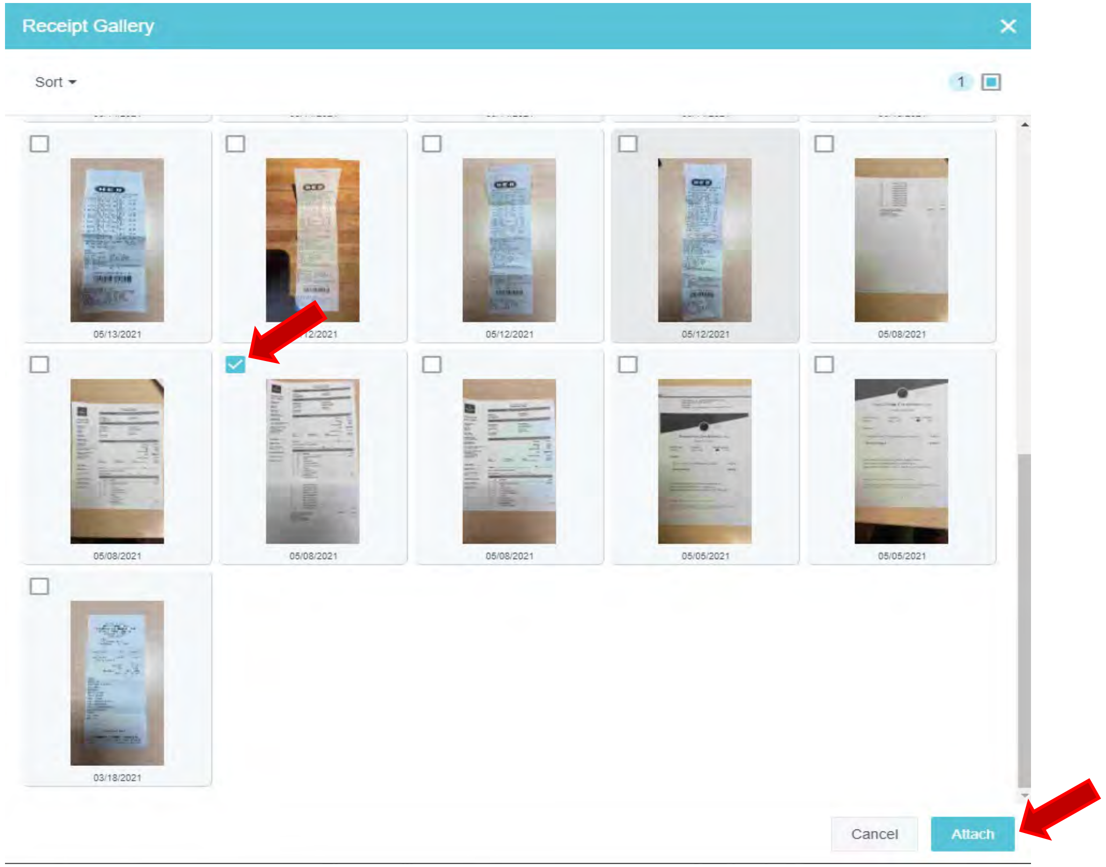
The date of the transaction should appear after the appropriate expense tile is selected. If need be additional information can be added to the business purpose or description. The allocation will populate, and additions can be added here as well.

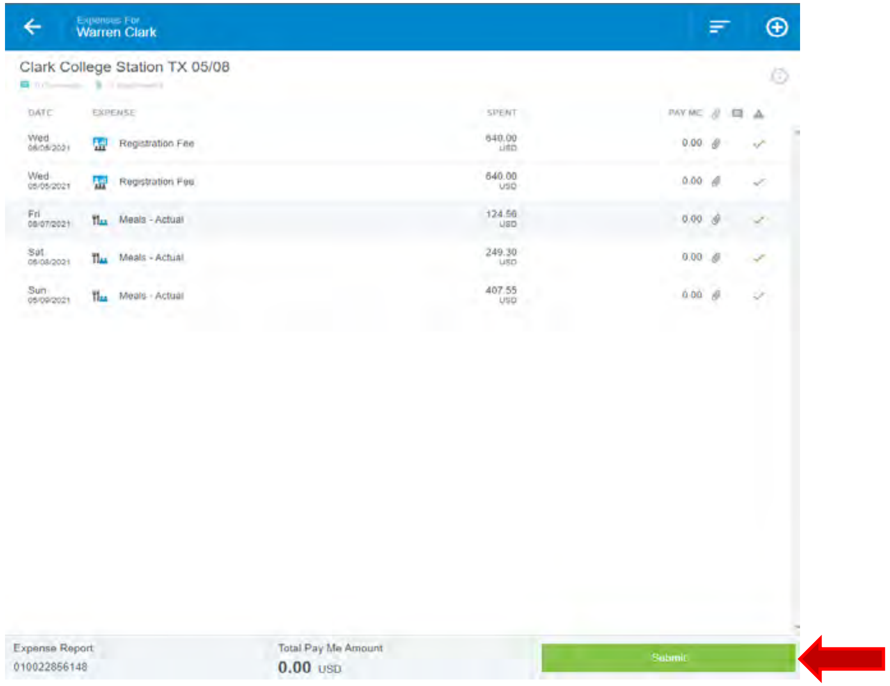


Scroll further down the screen and you will see that the Lamar Travel Card expense has been downloaded. The next step is to click, "Add Attachments". A drop-down box will appear, you then should select from the two options. In this case we will select "From Receipt Gallery".



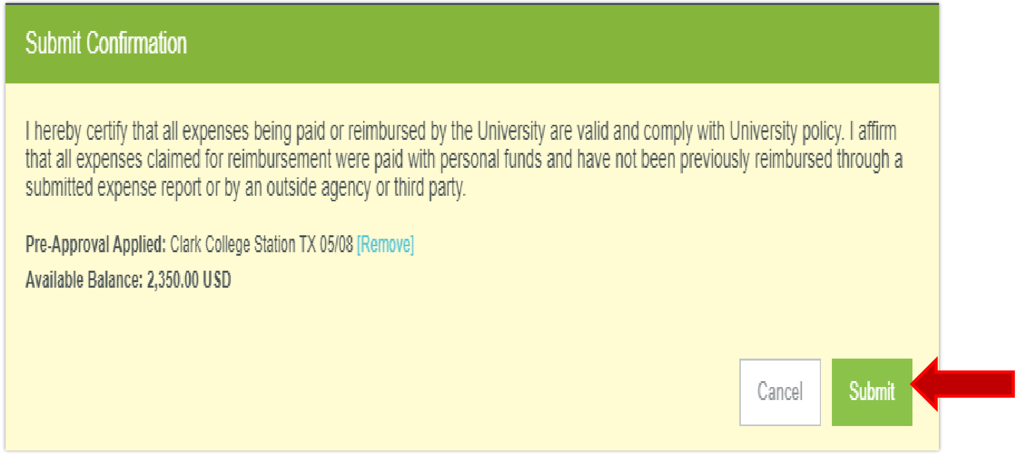
After selecting from the "Receipt Gallery" option, all receipts in your gallery will appear. Click on the box that is in the upper left corner next to the receipt that relates to the credit card expense. Then click "Attach".



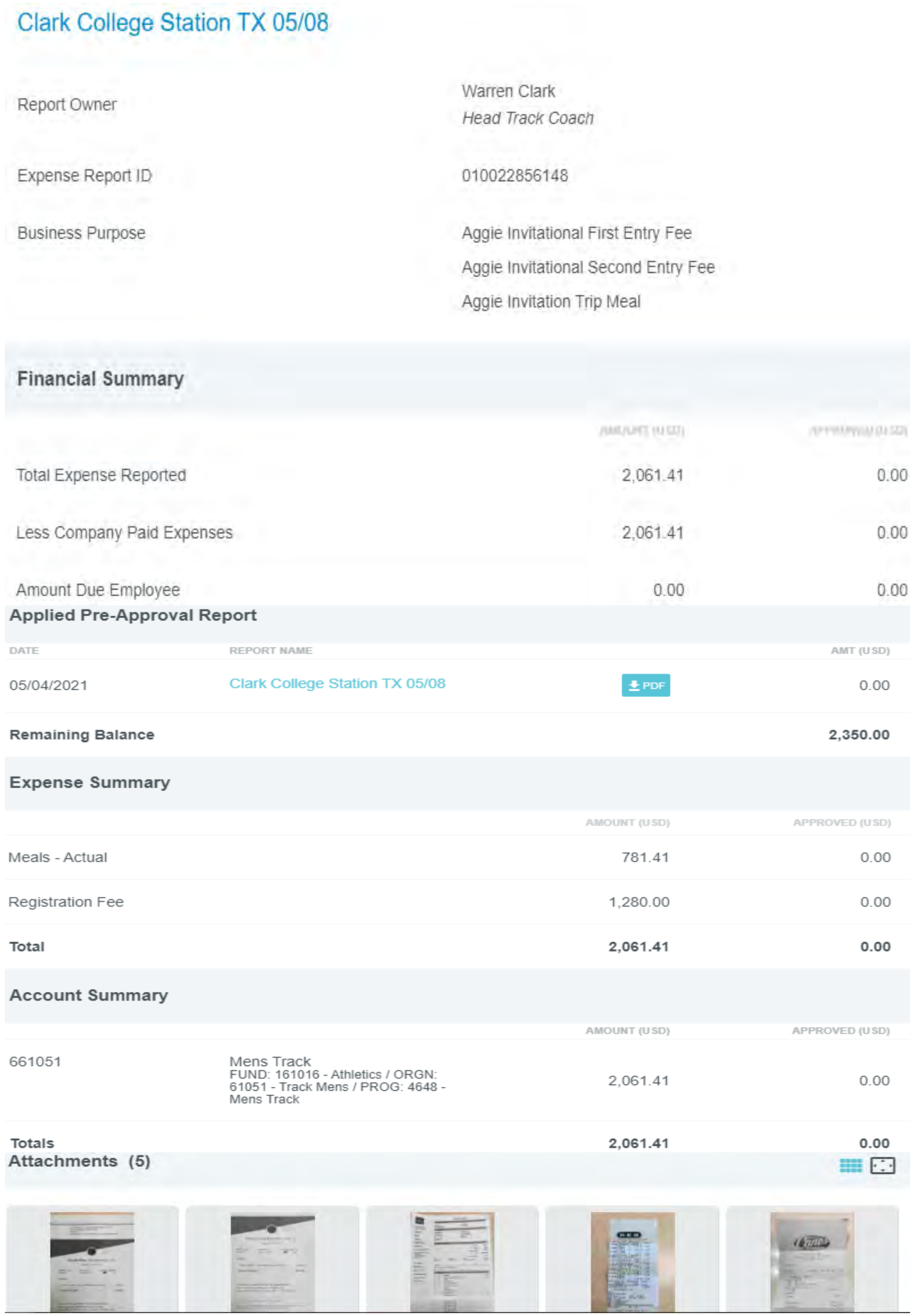


The left of your screen will then populate the expense as a line item and a green check will appear. This step will be completed for all credit card expenses. After you have added all expenses as line items, select "Submit".

On the right-hand side of your screen a submit confirmation will appear. Please read the agreement, but do not submit without scrolling down.



Following the agreement prompt please review your REPORT NAME, FINANCIAL SUMMARY, PRE-APPROVAL REPORT, EXPENSE SUMMARY, ACCOUNT SUMMARY, and any ATTACHMENTS. If in agreeance, then click “Submit”.



Clark College Station TX 05/08

Report Owner	Warren Clark *Head Track Coach*
Expense Report ID	010022856148
Business Purpose	Aggie Invitational First Entry Fee Aggie Invitational Second Entry Fee Aggie Invitation Trip Meal

Financial Summary

Total Expense Reported	2,061.41	0.00
Less Company Paid Expenses	2,061.41	0.00
Amount Due Employee	0.00	0.00

Applied Pre-Approval Report

DATE	REPORT NAME		AMT (USD)
05/04/2021	Clark College Station TX 05/08	PDF	0.00
Remaining Balance			**2,350.00**

Expense Summary

	AMOUNT (USD)	APPROVED (USD)
Meals - Actual	781.41	0.00
Registration Fee	1,280.00	0.00
Total	**2,061.41**	**0.00**

Account Summary

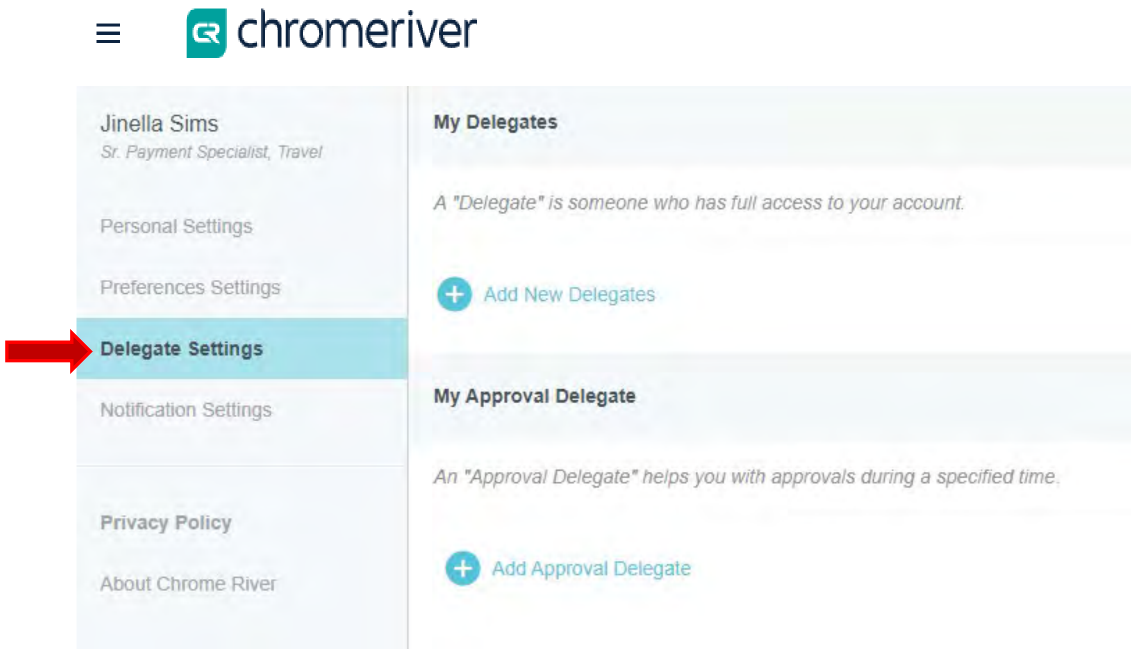
		AMOUNT (USD)	APPROVED (USD)
661051	Mens Track FUND: 161016 - Athletics / ORGN: 61051 - Track Mens / PROG: 4648 - Mens Track	2,061.41	0.00
Totals		**2,061.41**	**0.00**

Attachments (5)

DELEGATES

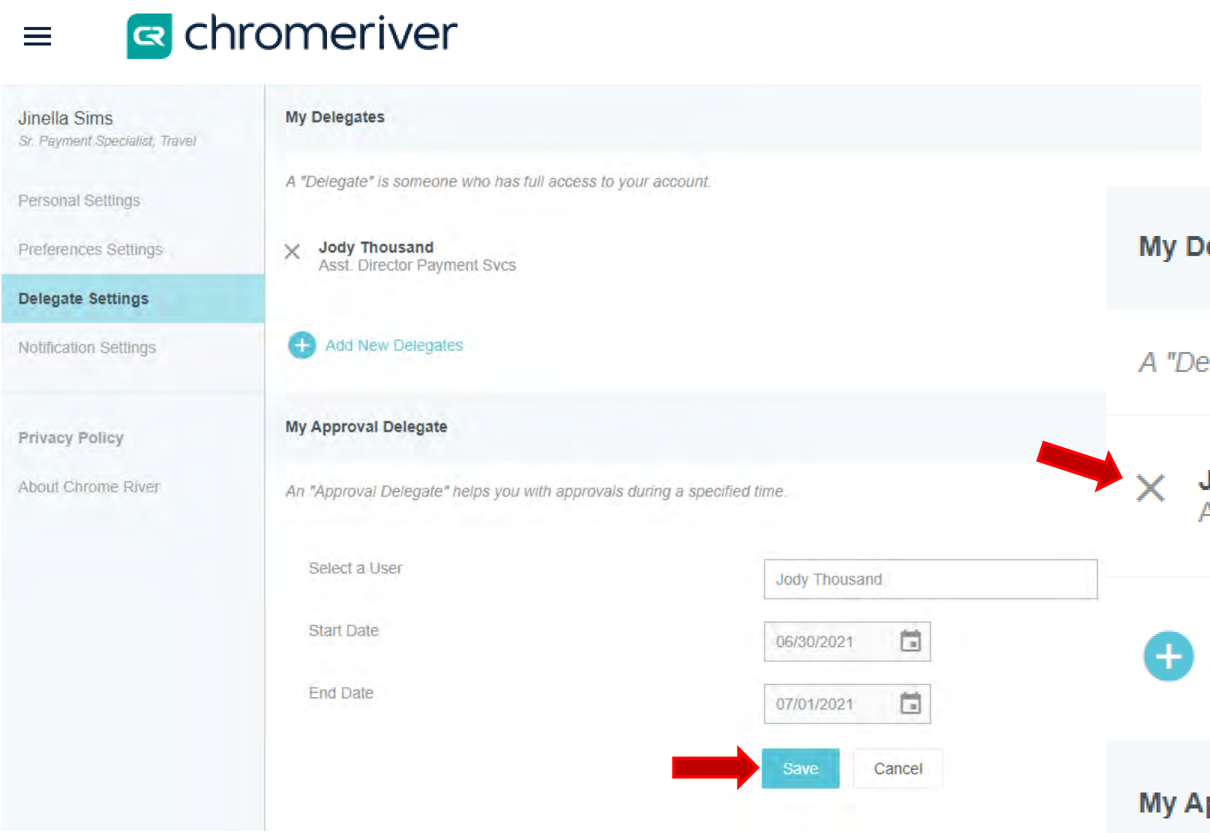
Chrome River allows users to delegate others to have full access to their account or to have approval authority.

To create a delegate, click on your name to the right of the dashboard. A drop-down box will appear, select “Settings”.

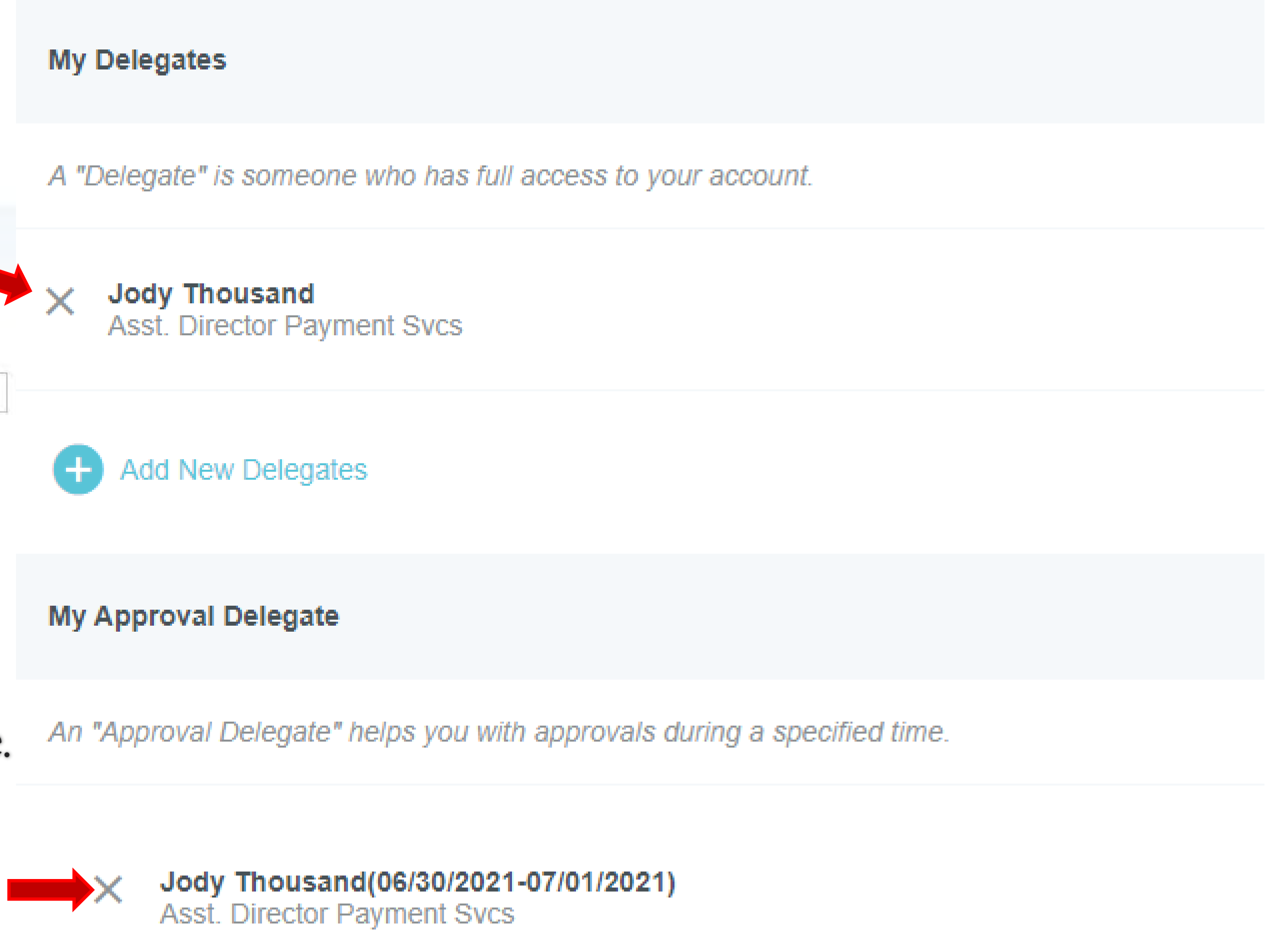


To the left of your screen a list of settings will appear select “Delegate Settings”.

The “My Delegates” option gives full access of your account to the person of your choice. The “My Approval Delegate” allows you to select a time frame for your delegate to assist you with approvals.



From the options make your selection and click, “Save”.



To remove a delegate, click the “X” next to the user’s name.

SAFE TRAVELS!

This presentation was to provide you with the basics of Chrome River and will get you off to a great start. If you have further questions, you are always welcome to reach out to the following:

Payment Services-Travel
409.880.8383
travel@lamar.edu

Physical Location:
Travel is in Section C, 127B of the Plummer Administration Building
(Round Bldg. on MLK Pkwy and East Virginia)

Mailing Address:
Lamar University
P.O. Box 10003
Beaumont, TX 77710