



# Chrome River Travel Guide ATHLETICS

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Created: 2021

# CONTENTS

[What is Chrome River?](#)

[CHROME RIVER  
TERMINOLOGY](#)

[HOW TO LOGIN](#)

[DASHBOARD TOUR](#)

[CREATING A PRE-  
APPROVAL](#)

[TRANSPORTATION](#)

[LODGING](#)

[MILEAGE](#)

[INCIDENTALS](#)

[PER DIEM](#)

[SUBMITTING A PRE-  
APPROVAL](#)

[TRACKING A PRE-  
APPROVAL](#)

[APPROVING BY EMAIL](#)

[APPROVING IN APP](#)

[SCAN AND SEND  
RECEIPTS](#)

[CREATING AN  
EXPENSE REPORT](#)

[TRACKING AN EXPENSE  
REPORT](#)

[CREATING AN EXPENSE  
REPORT WITH TRAVEL  
CARD EXPENSES](#)

[DELEGATES](#)

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!

## What is Chrome River?

- **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.

## CHROME RIVER TERMINOLOGY



# HOW TO LOGIN


banner.lamar.edu

LU Connect Log in ~... Banner Tri-campus... Account Codes in N... My Collection ~

[LU Connect](#) | [LU Online](#) | [Library](#) | [Maps](#) | [Directory](#)

 **LAMAR UNIVERSITY**

Banner Campus Links

 **LAMAR UNIVERSITY**  
MEMBER THE TEXAS STATE UNIVERSITY SYSTEM™

Log in with your LEA, the account you use to log in to LU Email and LU Learn.

LEA Username:

Password:

**LOGIN** clear

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

The screenshot shows the Chrome River dashboard interface. On the left is a sidebar menu with items: eWallet, Approvals, Expenses, and Pre-Approval. The main content area displays the Lamar University logo, contact information for Travel and ProCard support, and several reminders. At the bottom are quick start links for various tasks. Numbered callouts point to specific features: 1 points to the top menu bar, 2 to the Chrome River logo, 3 to the user profile, 4 to the eWallet section, 5 to the Expenses section, 6 to the Pre-Approval section, and 7 to the contact information.

**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

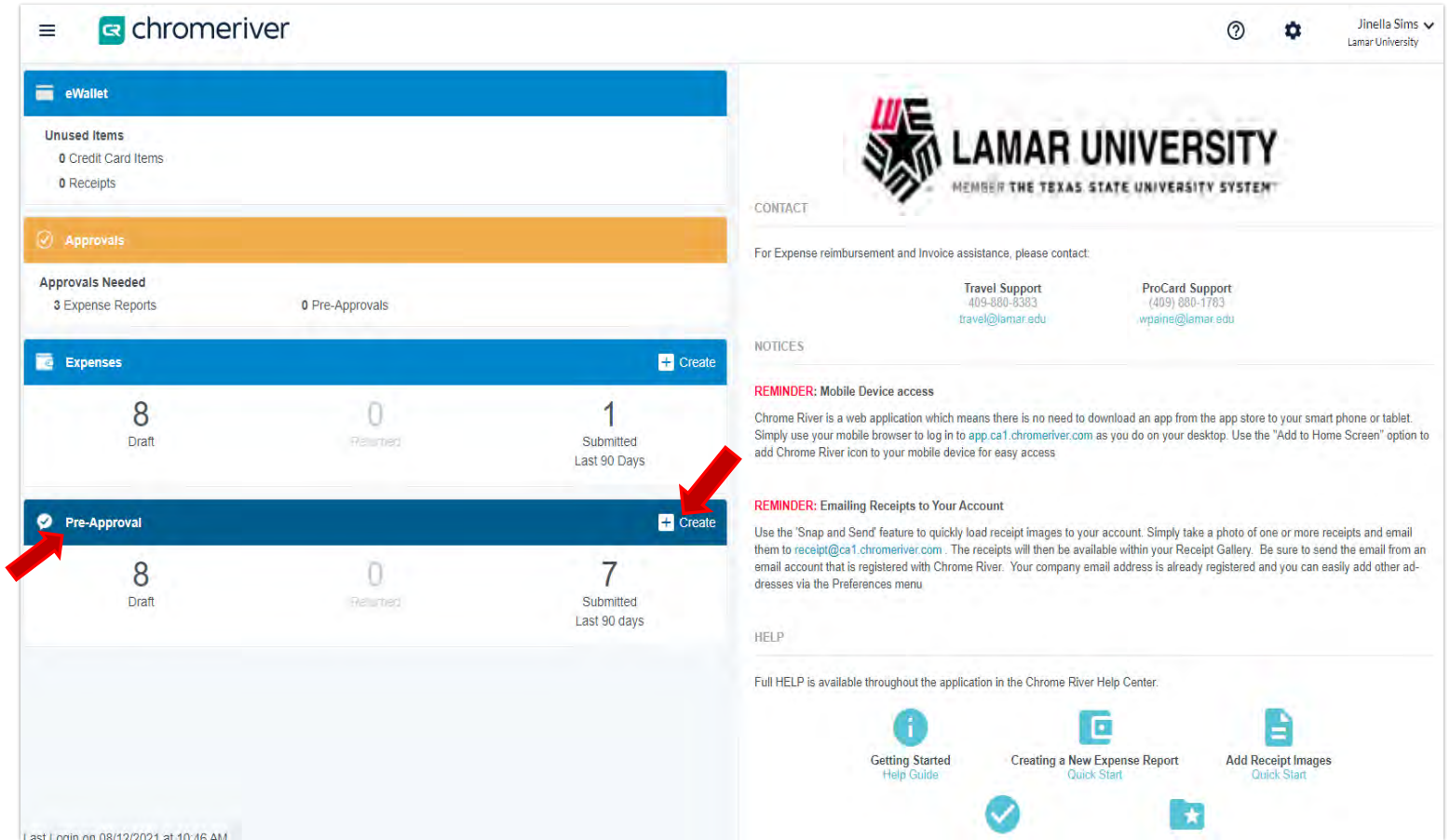
**7** Shows helpful contact information and helpful links

## 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.



The screenshot displays the Chrome River dashboard interface. The top navigation bar includes the Chrome River logo and the user's name, Jinella Sims, with a dropdown arrow. The main content area is divided into three primary sections: eWallet, Approvals, and Expenses. The eWallet section shows 0 Credit Card Items and 0 Receipts. The Approvals section shows 3 Expense Reports and 0 Pre-Approvals. The Expenses section shows 8 Draft, 0 Returned, and 1 Submitted (Last 90 Days). The Pre-Approval section is highlighted with a red arrow pointing to the 'Create' button, showing 8 Draft, 0 Returned, and 7 Submitted (Last 90 Days). The right sidebar contains the Lamar University logo, contact information for Travel Support and ProCard Support, notices, and help links. The bottom of the dashboard shows the last login time: 08/12/2021 at 10:46 AM.

**chrome river**

**eWallet**

Unused Items

0 Credit Card Items

0 Receipts

**Approvals**

Approvals Needed

3 Expense Reports

0 Pre-Approvals

**Expenses** **Create**

8 Draft

0 Returned

1 Submitted Last 90 Days

**Pre-Approval** **Create**

8 Draft

0 Returned

7 Submitted Last 90 Days

**LAMAR UNIVERSITY**

MEMBER THE TEXAS STATE UNIVERSITY SYSTEM

**CONTACT**

For Expense reimbursement and Invoice assistance, please contact:

**Travel Support**  
409-880-8383  
travel@lamar.edu

**ProCard Support**  
409-880-1763  
wpaine@lamar.edu

**NOTICES**

**REMINDER: Mobile Device access**

Chrome River is a web application which means there is no need to download an app from the app store to your smart phone or tablet. Simply use your mobile browser to log in to [app.ca1.chromeriver.com](http://app.ca1.chromeriver.com) as you do on your desktop. Use the "Add to Home Screen" option to add Chrome River icon to your mobile device for easy access.

**REMINDER: Emailing Receipts to Your Account**

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@ca1.chromeriver.com](mailto:receipt@ca1.chromeriver.com). The receipts will then be available within your Receipt Gallery. 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.

**HELP**

Full HELP is available throughout the application in the Chrome River Help Center.

**Getting Started**  
Help Guide

**Creating a New Expense Report**  
Quick Start

**Add Receipt Images**  
Quick Start

Last Login on 08/12/2021 at 10:46 AM

CancelSave

✓ 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...

+ Add Allocation

LAST  
STEP

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.

This is what we  
know as the  
INDEX

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

chromeriver

Pre-Approvals For Jinella Sims

SIMS - SAN ANTONIO, TX 05.06-05.07

EXPENSE

ESTIMATED

Click "+" to add your first item.

ADD PRE-APPROVAL TYPES

AIRFARE

GROUND TRANSPORTATION

MILEAGE

HOTEL

MEALS

REGISTRATION FEE

INCIDENTALS

PA Report ID: QA0000728384

Total Estimated Amount: 0.00 USD

Submit

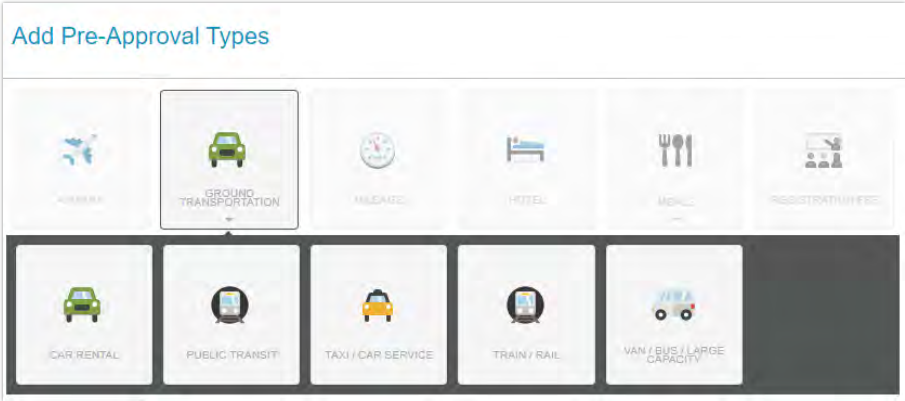
If at any time you need to navigate out of the “Add Pre-Approval Types” screen, you can access the page by clicking the plus symbol on the right-hand side of the Pre-Approval dashboard.

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.

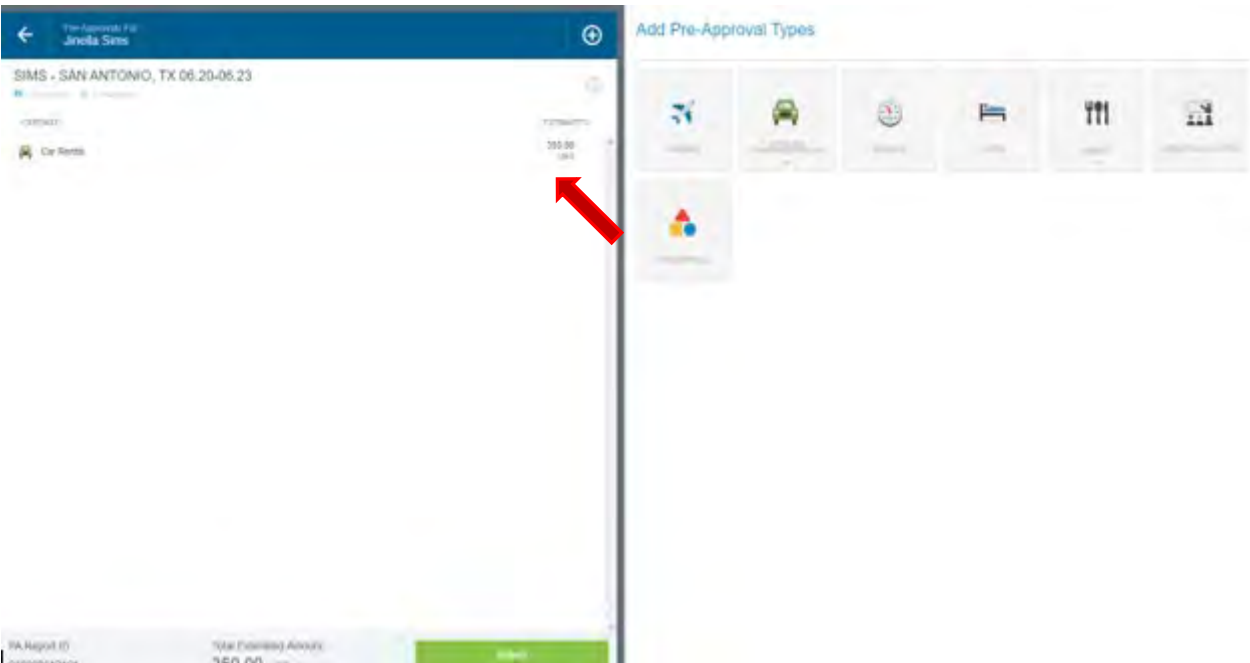


# TRANSPORTATION

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”.

Cancel

Save

Car Rental

Estimated Amount

350.00

USD

Description

Optional

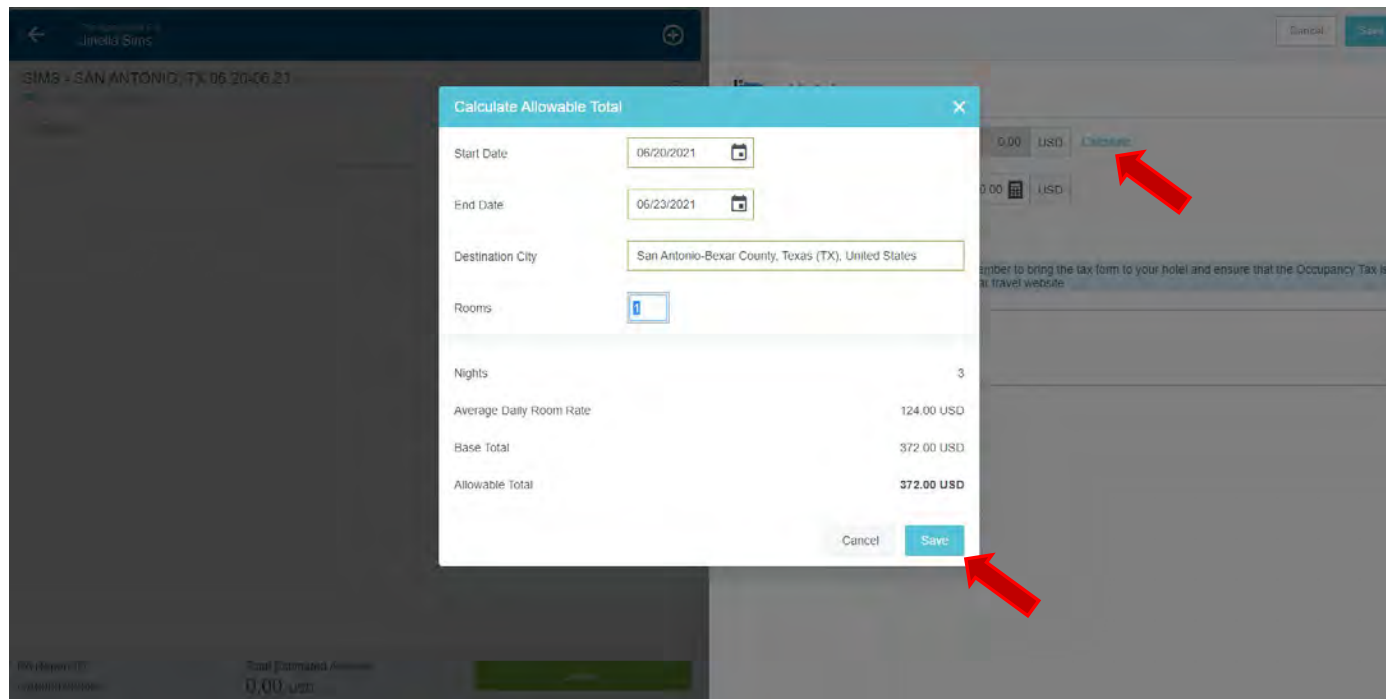
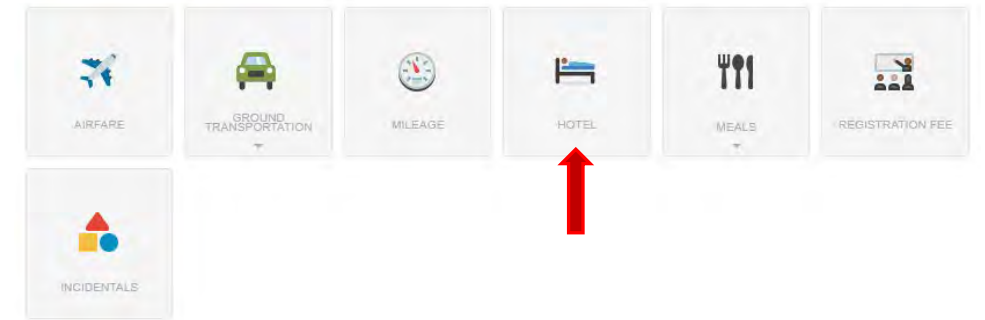




# LODGING

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

Add Pre-Approval Types



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.

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① ⚙ Jinella Sims  
Lamar University

Cancel Save

SIMS - SAN ANTONIO, TX 06.20-06.23

City: San Antonio, TX  
Check In: 06/20/23  
Check Out: 06/23/23  
Rooms: 1  
Rate: \$150.00  
Total: \$150.00

Hotel

Allowable Total: 372.00 USD [Calculate](#)

Estimated Amount: 372.00 USD

☐ This will be a Conference Hotel

If Hotel stay is in the State of Texas, please remember to bring the tax form to your hotel and ensure that the Occupancy Tax is removed from your Hotel Total. Please see Lamar Travel website.

Description:

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① ⚙ Jinella Sims  
Lamar University

Add Pre-Approval Types

SIMS - SAN ANTONIO, TX 06.20-06.23

City: San Antonio, TX  
Check In: 06/20/23  
Check Out: 06/23/23  
Rooms: 1  
Rate: \$150.00  
Total: \$150.00

Car Rental

350.00 USD

Hotel

372.00 USD

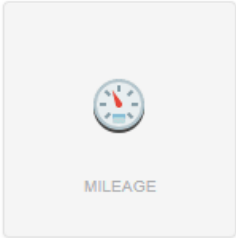
PA Report ID: 070666812191

Total Estimated Amount: 722.00 USD

Save

# 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.

Cancel

Save

 Mileage

Date

06/28/2021 

Estimated Amount

0.00 USD


Description

Optional

Rate

0.56

Miles

0.00  Calculate Mileage

Deduction

None

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.

Calculate Mileage

Lamar University, South Martin Luther King Junior Parkway, Beaumont, TX, USA

Alamodome, Live Oak Street, San Antonio, TX, USA

Lamar University, South Martin Luther King Junior Parkway, Beaumont, TX, USA

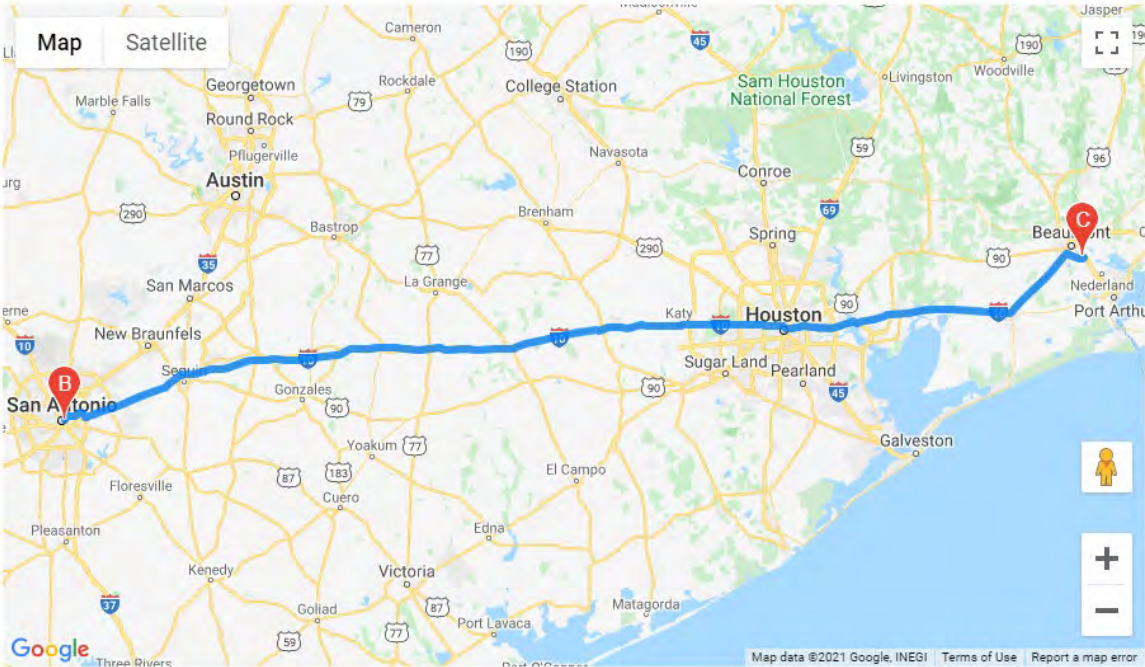
+ Add Destination

Return to Start

561.54 Miles

Map

Satellite



Map data ©2021 Google, INEGI

Terms of Use

Report a map error


Cancel

Save Trip

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

Cancel

Save

Mileage

Date

06/07/2021

Estimated Amount

314.46

USD

Description

Optional


From: Lamar University, South Martin Luther King Junior Parkway, Beaumont, TX, USA  
To: Alamodome, Live Oak Street, San Antonio, TX, USA  
To: Lamar University, South Martin Luther King Junior Parkway, Beaumont, TX, USA

Rate

0.56

Miles

561.54

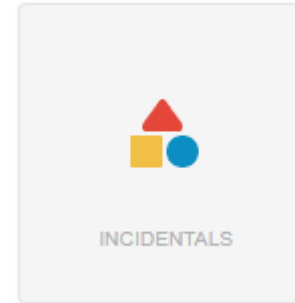
 Calculate Mileage

Deduction

None

# INCIDENTALS

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



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

Cancel

Save

Incidentals

Estimated Amount

150.00 USD

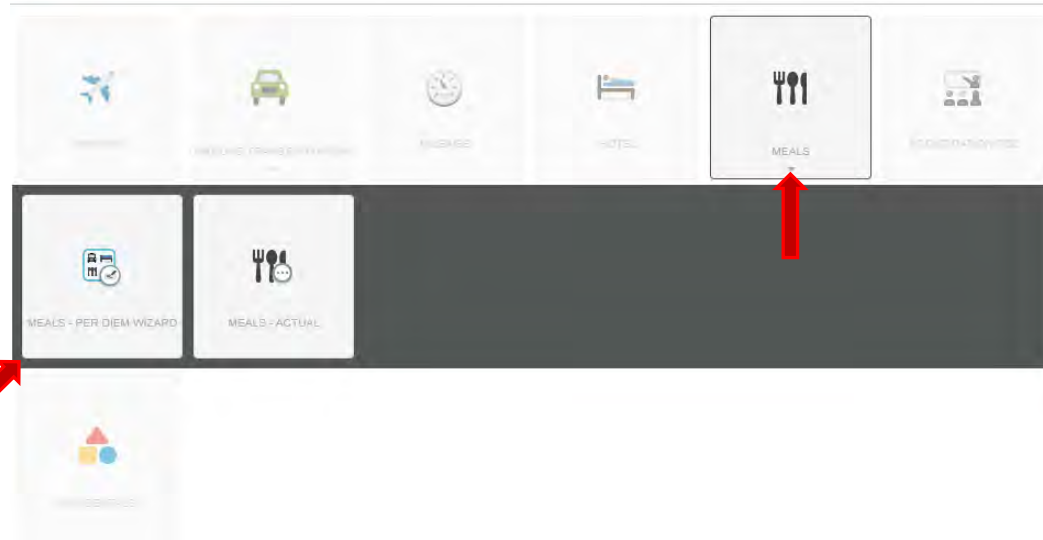
Description  
Optional



# PER DIEM

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

Add Pre-Approval Types



Per Diem Wizard

Start Date: 07/05/2021 06:00

End Date: 07/09/2021 19:00

Days: 5

Description (Optional): Add Description

Destination City: San Antonio-Bexar County, Texas (TX), United States

Number of Attendees: 1

Add Entries Cancel

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.

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?

⚙

Jinella Sims  
Lamar University

←

Pre-Approvals For  
Jinella Sims

+

SIMS - CHARLOTTE, NC 07.20-07.25.2021

Comments

Attachments

EXPENSE

ESTIMATED

Airfare

328.00 USD

Car Rental

157.00 USD

Mileage

97.17 USD

Hotel

540.00 USD

Meals - Per Diem

56.00 USD

Meals - Per Diem

56.00 USD

Meals - Per Diem

56.00 USD

Meals - Per Diem

56.00 USD

Meals - Per Diem

56.00 USD

Meals - Per Diem

56.00 USD

Registration Fee

50.00 USD

Incidentals

180.00 USD

Add Pre-Approval Types

AIRFARE

GROUND TRANSPORTATION

MILEAGE

HOTEL

MEALS

REGISTRATION FEE

INCIDENTALS

PA Report ID  
QA0000731166

Total Estimated Amount  
1,688.17 USD

Submit

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)

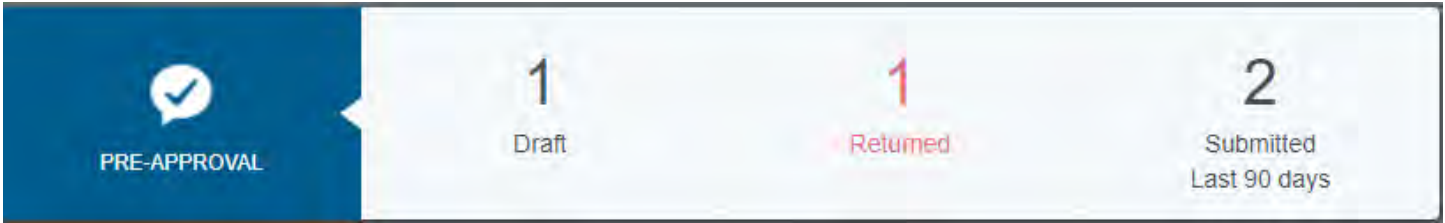
Add Comment

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.

Submitted Pre-Approvals			
Houston, TX 11.29-11.30.2020 QA0000647027	12/17/2020	0.00 USD	USED / EXPIRED
San Antonio, TX 11.25-11.30.2020 QA0000647026	12/17/2020	0.00 USD	USED / EXPIRED
Austin, TX 11.05-11.06.2020 QA0000646728	12/17/2020	0.00 USD	USED / EXPIRED
El Paso, TX 12.17-12.20.2020 QA0000646732	12/17/2020	183.00 USD	APPROVED

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

Submitted Pre-Approvals		
Houston, TX 11.29-11.30.2020 QA0000647027	12/17/2020	0.00 USD USED / EXPIRED
San Antonio, TX 11.25-11.30.2020 QA0000647026	12/17/2020	0.00 USD USED / EXPIRED
Austin, TX 11.05-11.06.2020 QA0000646728	12/17/2020	0.00 USD USED / EXPIRED
El Paso, TX 12.17-12.20.2020 QA0000646732	12/17/2020	183.00 USD APPROVED

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.

OpenPDFTrackingExpire

El Paso, TX 12.17-12.20.2020

Report Owner	Jinella Sims
Created By	Jinella Sims
Create Date	12/14/2020
Pay Me Amount	183.00 USD
PA Report ID	QA0000646732
From Date	12/17/2020
To Date	12/20/2020
Business Purpose	Meeting at UTEP

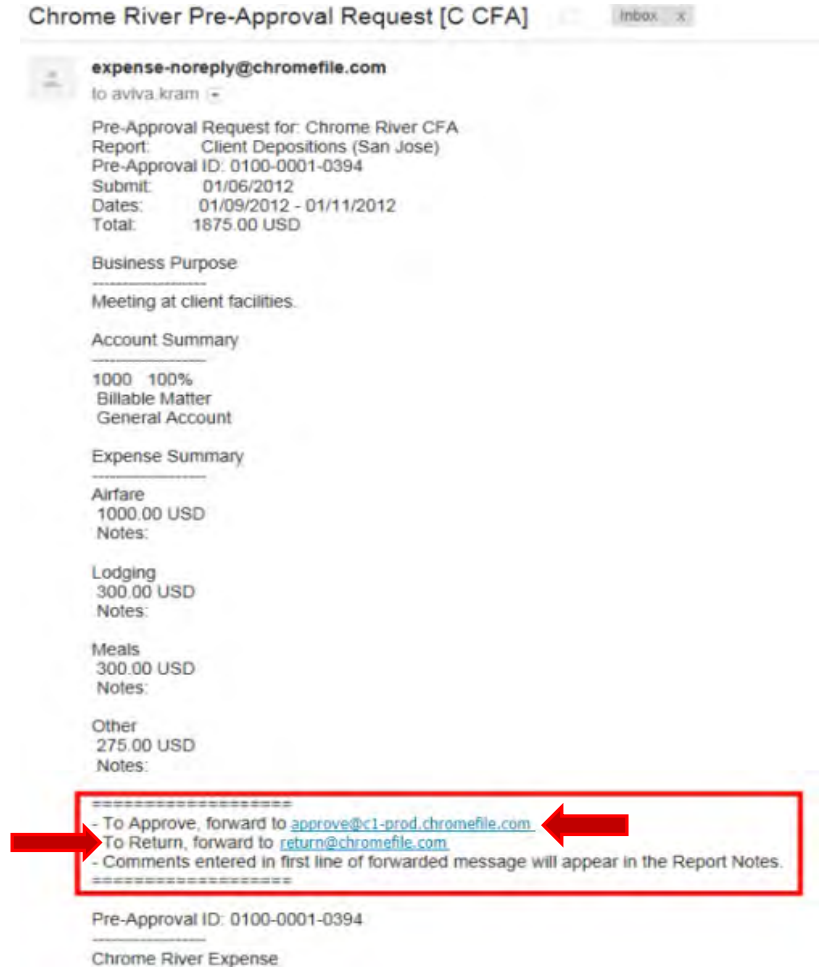
Tracking for El Paso, TX 12.17-12.20.2020

Status	Approved
Estimated Amount	183.00 USD
Routing Steps	
<div><div>&lt;</div><div><div></div><div></div><div></div><div></div><div></div><div></div></div></div>	
Step Number	1
Approver	Auto Bot (Ethos Budget Checker)
Assigned Date	12/14/2020 02:37 PM
Step Status	Returned
Completed Date	12/15/2020 12:03 PM
Completed By	Auto Approve
Routing Rule	15 - AUTOBOT - Initial PA Budget Check

# 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.





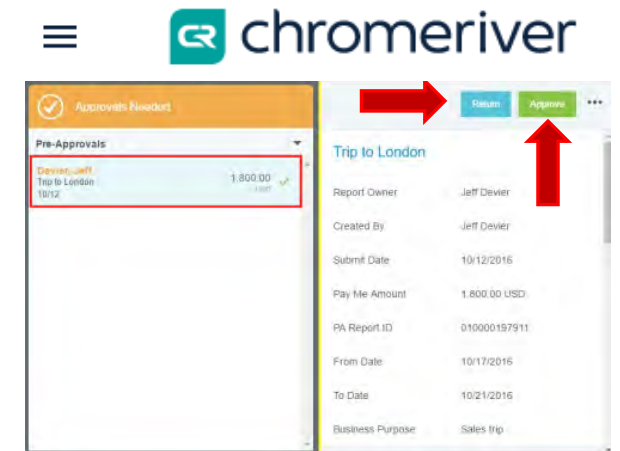
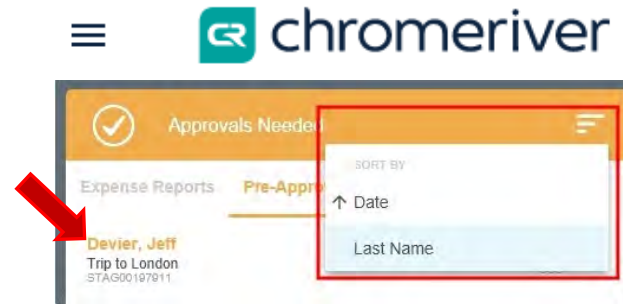
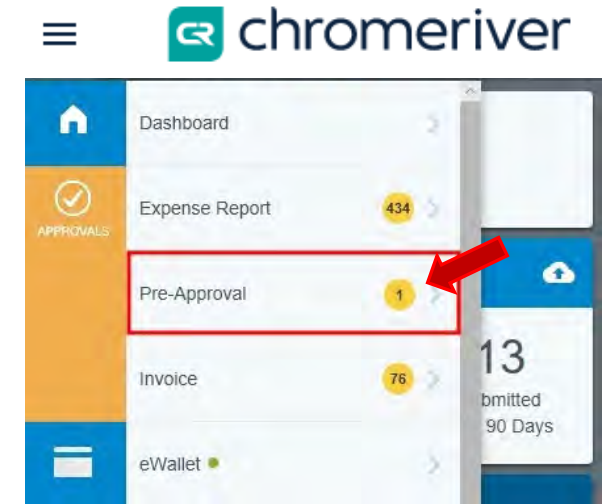
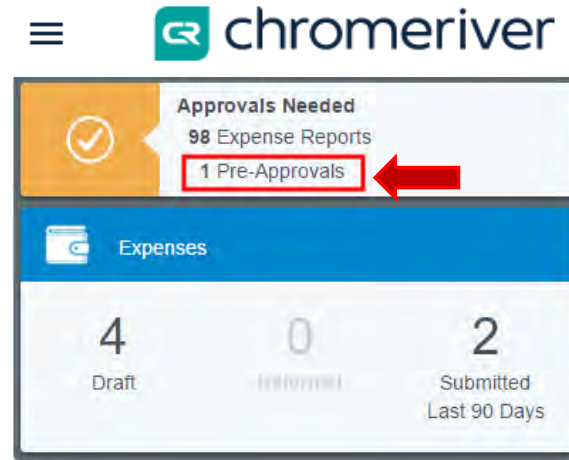
# APPROVING IN APP

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](mailto: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 form is titled 'Expenses For Jinella Sims'. It has a 'Cancel' button and a 'Save' button at the top right. The form fields are: 'Import from Pre-Approval' (Optional) with an 'IMPORT PRE-APPROVAL' button, 'Report Name' (text input), 'Report Type' (dropdown menu with '-- Select --'), 'Business Purpose' (text input), 'Start Date' (calendar icon), 'End Date' (calendar icon), and 'Fiscal Year' (dropdown menu with 'FY21'). A red arrow points to the 'IMPORT PRE-APPROVAL' button.

Expenses For Jinella Sims

Import from Pre-Approval (Optional) **IMPORT PRE-APPROVAL**

Report Name

Report Type

Business Purpose

Start Date

End Date

Fiscal Year

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.

CancelSave

Expenses For Jinella Sims

Report Name

SIMS - HOUSTON, TX 07.07-07.09.2021

Report Type

Travel

Business Purpose

CHROME RIVER CONFERENCE

Start Date

07/07/2021

End Date

07/09/2021

Trip Type

Domestic (in Texas)

Traveler Type

Individual

This is Athletic Team Travel or On-Campus Athletic Official Visit Expenses

☐

Fiscal Year

FY21

Pre-Approval Expense Summary

Pre-Approval Report Applied

SIMS - HOUSTON, TX 07.07-07.09.2021

←Expenses For Jinella Sims

☰+

SIMS - HOUSTON, TX 07.07-07.09.2021

Comments

Attachments

DATEEXPENSESPENTPAY ME

Click "+" to add your first item.

Add Expenses

Create New

eWallet

AllTripsCash AdvanceCredit CardOfflineRecycle Bin

eReceipts

Receipt Gallery

AIR TRAVEL

GROUND TRANSPORTATION

MILEAGE

HOTEL

MEALS

TELECOM

OFFICE EXPENSES

DUES / FEES

PROFESSIONAL DEVELOPMENT

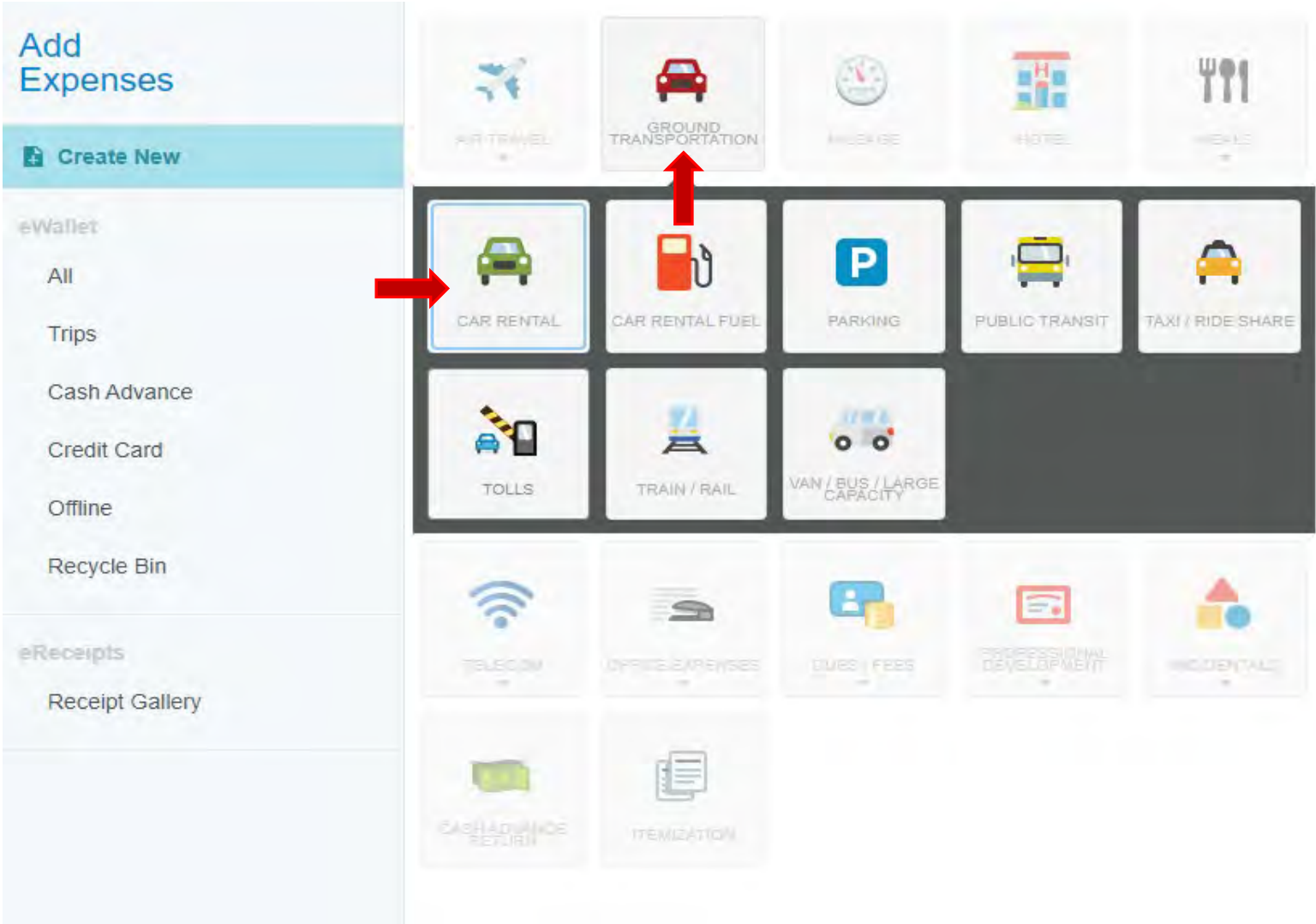
INCIDENTALS

CASH ADVANCE RETURN

ITEMIZATION




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.

CancelSave

Car Rental

Date

07/09/2021

Spent

1.00

USD

Business Purpose

CHROME RIVER CONFERENCE

Description  
Optional

Class

Compact

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

Allocation

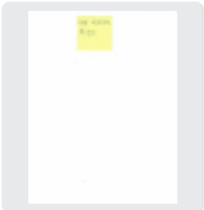
430110 Controller FUND: 140001 - Designated Tuition / ORGN: 30110 - Controller / PROG: 600 - Institutional Support

+ Add Allocation

Attachments (1)

Drag image here to upload

Add Attachments





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”.

←

Expenses For Jinella Sims








☰

+

SIMS - HOUSTON, TX 07.07-07.09.2021

🗨️ Comments

📎 Attachments

DATE	EXPENSE	SPENT	PAY ME	
Wed 07/07/2021	 Meals - Per Diem	61.00 USD	61.00	✓
Thu 07/08/2021	 Meals - Per Diem	61.00 USD	61.00	✓
Fri 07/09/2021	 Car Rental	1.00 USD	1.00	✓
Fri 07/09/2021	 Hotel	1.00 USD	1.00	✓
Fri 07/09/2021	 Incidentals	1.00 USD	1.00	✓
Fri 07/09/2021	 Registration Fee	1.00 USD	1.00	✓
Fri 07/09/2021	 Meals - Per Diem	61.00 USD	61.00	✓

Add Expenses

Create New

eWallet

All

Trips

Cash Advance


Credit Card


Offline


Recycle Bin


Receipts


Receipt Gallery


 AIR TRAVEL


 GROUND TRANSPORTATION


 MILEAGE


 HOTEL


 MEALS


 TELECOM


 OFFICE EXPENSES

 DUES / FEES

 PROFESSIONAL DEVELOPMENT

 INCIDENTALS

 CASH ADVANCE RETURN

 ITEMIZATION

Expense Report

QA0023266332

Total Pay Me Amount

187.00 USD

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	<a href="#">SIMS - HOUSTON, TX 07.07-07.09.2021</a> 	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”.

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EWALLET

Unused Items

0 Credit Card Items

0 Receipts

APPROVALS

Approvals Needed

3 Expense Reports

0 Pre-Approvals

EXPENSES

8 Draft

0 Submitted

1 Submitted Last 90 Days

PRE-APPROVAL

6 Draft

0 Submitted

2 Submitted Last 90 days

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Dashboard

Expense Report

Pre-Approval

3

0

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.

Submitted Expense Reports

SIMS - HOUSTON, TX 07.07-07.09.2021

07/09/2021

187.00 USD

PENDING

Houston, TX 11.29-11.30.2020

12/17/2020

1,050.00 USD

PENDING

Open

PDF

Tracking

Recall

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”.

SIMS - HOUSTON, TX 07.07-07.09.2021

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.

The image shows two screenshots from a web application. The top screenshot is the 'Expenses' dashboard for Warren Clark at Lamar University. It features a blue header with a '+ Create' button (indicated by a red arrow). Below the header, there are three summary cards: '8 Draft', '0 Returned', and '1 Submitted Last 90 Days'. The main content area is titled 'Expenses For Warren Clark' and contains a form with fields for 'Report Name', 'Report Type' (a dropdown menu), 'Business Purpose', 'Start Date', 'End Date', and 'Fiscal Year' (set to 'FY21'). A red arrow points to the 'IMPORT PRE-APPROVAL' button in the top left of the form.

The bottom screenshot is a modal window titled 'Import Pre-Approval'. It has a search bar labeled 'Select a pre-approval report'. Below the search bar is a table with three columns: 'REPORT NAME', 'ORIGINAL AMT', and 'REMAINING'. The table lists two reports: 'Clark College Station TX 05/08' with an original amount of 2,350.00USD and a remaining amount of 2,350.00USD, and 'CLARK HUMBLE TX 05/13-05/16' with an original amount of 11,000.00USD and a remaining amount of 11,000.00USD. A red arrow points to the close button (an 'X' icon) in the top right corner of the modal.

REPORT NAME	ORIGINAL AMT	REMAINING
Clark College Station TX 05/08	2,350.00USD	2,350.00USD
CLARK HUMBLE TX 05/13-05/16	11,000.00USD	11,000.00USD

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

**Import Pre-Approval**

Clark College Station TX 05/08

**Report Summary**

From Date	05/08/2021
To Date	05/08/2021
Business Purpose	Aggie Invitational

**Expense Summary**

	REMAINING (USD)	SPENT (USD)
Car Rental	150.00	0.00
Meals - Actual	1,500.00	0.00
Registration Fee	700.00	0.00
<b>Total</b>	<b>2,350.00</b>	<b>0.00</b>

**Allocations**

661051 Mens Track FUND: 161016 - Athletics / ORGN: 61051 - Track Mens / PROG: 4648 - Mens Track	2,350.00
--	----------

**Import**

**chromeriver**

Clark College Station TX 05/08

DATE	EXPENSE	SPENT	PAY ME	
Wed 05/05/2021	Registration Fee	840.00 USD	0.00	✓
Wed 05/05/2021	Registration Fee	840.00 USD	0.00	✓
Fri 05/07/2021	Meals - Actual	124.56 USD	0.00	✓
Sat 05/08/2021		1,500.00 USD	1,500.00	▲
Sat 05/08/2021	Car Rental	150.00 USD	150.00	▲

**Add Expenses**

**Credit Card**

**Expense Report** 010022856148 **Total Pay Me Amount** 1,650.00 USD

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 screenshot displays a web application for managing credit card expenses. On the left is a sidebar with navigation options: 'Add Expenses', 'Create New', 'eWallet', 'All', 'Trips', 'Cash Advance', 'Credit Card' (highlighted), 'Offline', 'Recycle Bin', 'Receipts', and 'Receipt Gallery'. The main area shows a list of transactions. At the top right of the main area is an 'Add' button, indicated by a red arrow. Each transaction row includes a status icon (question mark or receipt icon), the card name, date, merchant, and amount. A checkbox is located to the right of each amount, with the first one checked, also indicated by a red arrow.

Transaction Details	Amount (USD)	Selection
Lamar Travel Card Other 05/09/2021 PANERA BREAD #204121 O	407.55	<input checked="" type="checkbox"/>
Lamar Travel Card Other 05/13/2021 H-E-B #589	132.80	<input type="checkbox"/>
Lamar Travel Card + Receipt 05/13/2021 Merged Details	70.24	<input type="checkbox"/>
Lamar Travel Card + Receipt 05/14/2021 Merged Details	20.44	<input type="checkbox"/>
Lamar Travel Card + Receipt 05/15/2021 Merged Details	6.46	<input type="checkbox"/>
Lamar Travel Card Other 05/15/2021 OLIVE GARDEN 0024477	398.05	<input type="checkbox"/>
Lamar Travel Card Other 05/15/2021 OLIVE GARDEN 0024477	277.08	<input type="checkbox"/>
Lamar Travel Card Other 05/16/2021 OLIVE GARDEN 0021047	46.03	<input type="checkbox"/>

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.

≡

chromeriver

?

⚙

Warren Clark ▾  
Lamar University

←

Expenses For Warren Clark

⋮

+

Clark College Station TX 05/08

DATE

EXPENSE

SPENT

PAY ME

Wed 05/05/2021

Registration Fee

640.00 USD

0.00

Wed 05/05/2021

Registration Fee

640.00 USD

0.00

Fri 05/07/2021

Meals - Actual

124.56 USD

0.00

Sat 05/08/2021

Car Rental

1,500.00 USD

1,500.00

Sat 05/08/2021

Car Rental

150.00 USD

150.00

Expense Report

010022856148

Total Pay Me Amount

1,650.00 USD

Cancel

Save

?

Select Valid Expense Type ←

AIR TRAVEL

GROUND TRANSPORTATION

HOTEL

MEALS

TELECOM

OFFICE EXPENSES

DUES / FEES

PROFESSIONAL DEVELOPMENT

INCIDENTALS

CASH ADVANCE RETURN

ITEMIZATION

There's a missing piece to the puzzle. Please select an Expense Type.

Downloaded Details

Lamar Travel Card >

Attachments (0)

Drag image here to upload

Add Attachments ▾

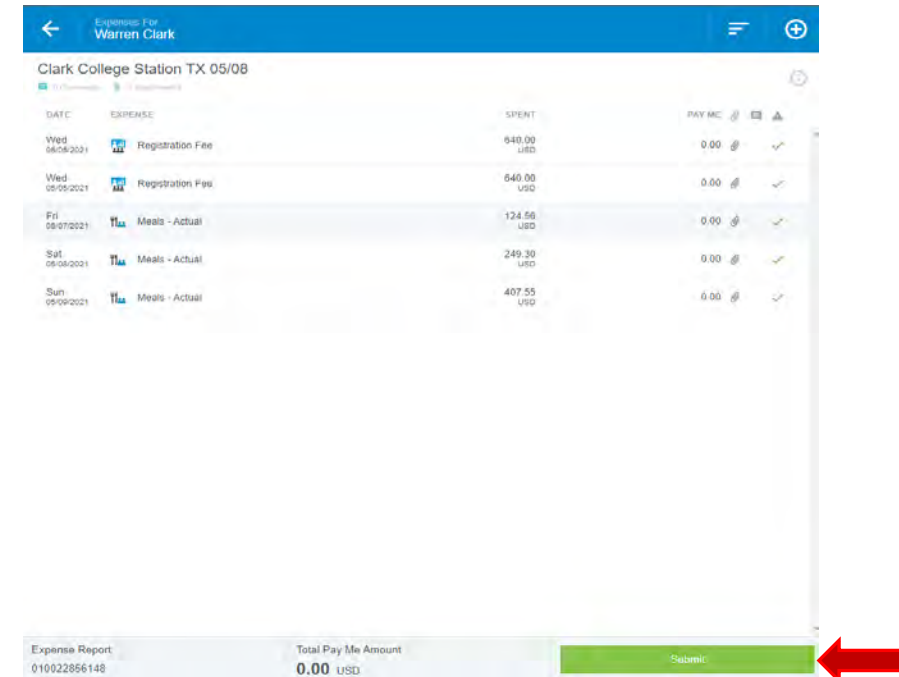
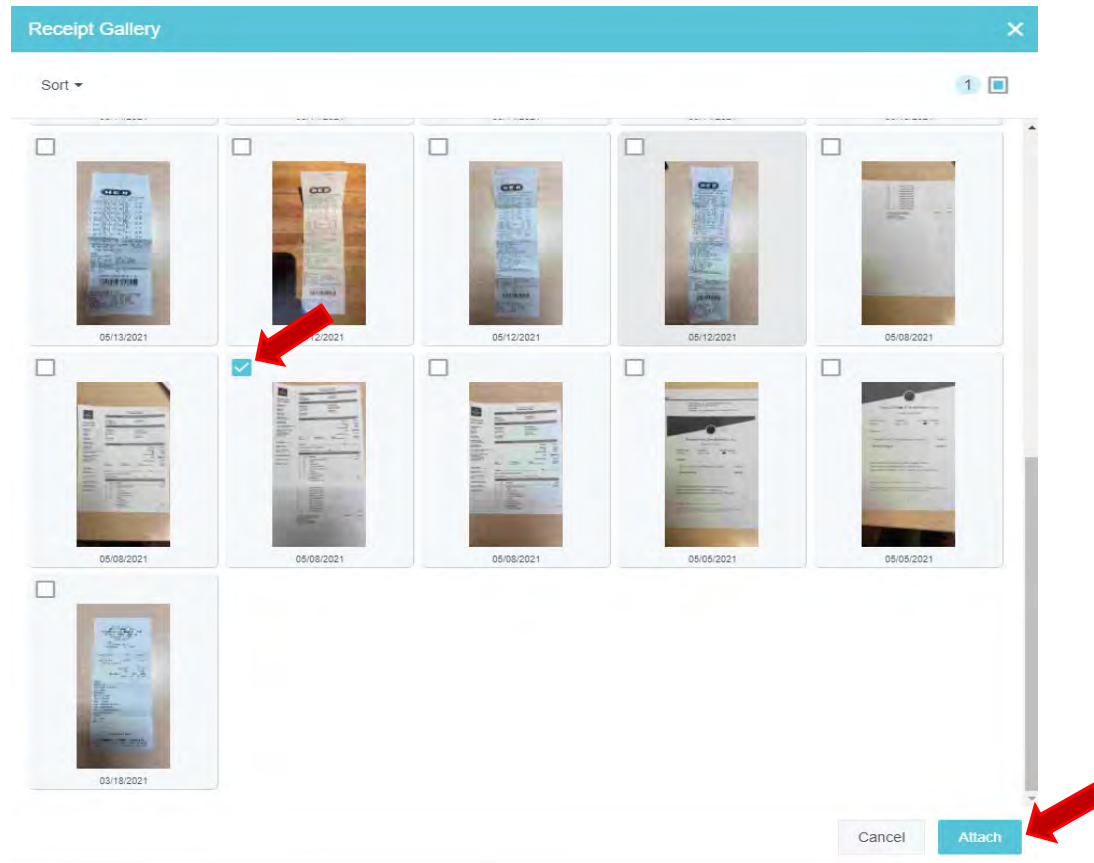
The date of the transaction should appear after the appropriate expense tile is selected. If need be additional information can be added to the business purpose or description. The allocation will populate, and additions can be added here as well.

The screenshot shows the Chromeriver mobile app interface. On the left, a list of transactions is visible, including 'Registration Fee' and 'Meals - Actual'. The main screen displays the 'Meals - Actual' entry form. The 'Date' is set to 05/09/2021, and the 'Spent' amount is 407.55 USD. The 'Business Purpose' field contains 'Aggie Invitation Trip Meal'. The 'Description' field is empty. The 'Allocation' field is populated with '661051 Mens Track FUND: 161016 - Athletics / ORGN: 61051 - Track Mens / PROG: 4648 - Mens Track'. The 'Downloaded Details' section shows 'Lamar Travel Card'. The 'Attachments' section is empty. Red arrows point to the 'Business Purpose', 'Description', and 'Allocation' fields.

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”.

This screenshot shows the 'Add Attachments' dropdown menu. The 'Downloaded Details' section shows 'Lamar Travel Card'. The 'Attachments' section is empty. The 'Add Attachments' button is highlighted with a red arrow. The dropdown menu shows two options: 'From Receipt Gallery' and 'Upload Attachments'. A red arrow points to the 'From Receipt Gallery' option.

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.

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: Clark College Station TX 05/08 [\[Remove\]](#)

Available Balance: 2,350.00 USD

Cancel

Submit

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		
	AMOUNT (USD)	APPROVED (USD)
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	<a href="#">PDF</a>	0.00

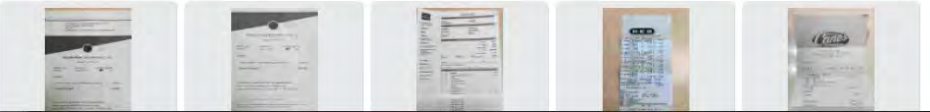
Remaining Balance 2,350.00

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)

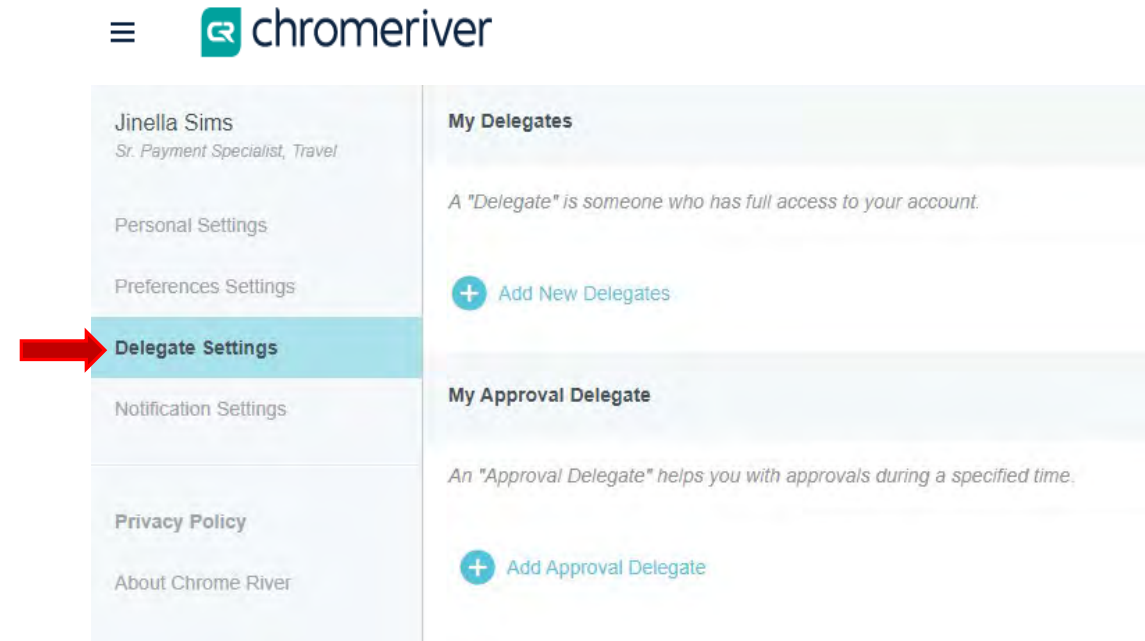


# DELEGATES

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.

Jinella Sims  
*Sr. Payment Specialist, Travel*

Personal Settings

Preferences Settings

Delegate Settings

Notification Settings

Privacy Policy

About Chrome River

My Delegates

A "Delegate" is someone who has full access to your account.

X

Jody Thousand  
Asst. Director Payment Svcs

+

Add New Delegates

My Approval Delegate

An "Approval Delegate" helps you with approvals during a specified time.

Select a User

Jody Thousand

Start Date

06/30/2021

End Date

07/01/2021

Save

Cancel

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

My Delegates

A "Delegate" is someone who has full access to your account.

X

Jody Thousand  
Asst. Director Payment Svcs

+

Add New Delegates

My Approval Delegate

An "Approval Delegate" helps you with approvals during a specified time.

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

X

Jody Thousand(06/30/2021-07/01/2021)  
Asst. Director Payment Svcs



## 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](mailto: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