OZARKS TECHNICAL COMMUNITY COLLEGE

CHROME RIVER

User Guide

6 Helpful TIPS for using ChromeRiver

myOTC – Banking Information:

- Need to add a bank account for your employee reimbursements?
- Simply go to www.my.OTC.edu to add/update your Employee Reimbursements bank account information.

Creating an expense report at the beginning of each month:

- Assign a report name *(i.e.: July 2023 Expenses)*
- Enter Start & End Date Range *(i.e.: 07/01/23 – 07/31/23)*
- Enter Trip Departure & Return Time *(if entering expenses for the entire month, use normal work hours i.e.: 8:00am & 5:00pm)*
- Business Purpose: use a generic name for the report *(i.e.: July Expenses)*
- Your expense report – draft is available in the ChromeRiver "Dashboard"
- As you incur allowable expenses, open the draft and use button to add reimbursement items *(i.e.: mileage, conferences, etc.)*
- Submit your expense report at the end of each month.

Recording Mileage:

- Round trip mileage in the same day? Click the "Return to Start" button to save time searching for return destination.
- Traveling to multiple locations in one day? Click the "Add Destination" button.

Tracking an Expense Report:

- Not sure where your report is in the approval process?
- Click on the "Submitted" reports on your Dashboard.
- Select the report in question & click "Tracking" button.

Approving an Expense Report:

- Use the "Approve" button in the email sent to you, OR
- Log in on your computer to approve expense report(s).
- If a correction needs to be made, click the "Return" button and add a note. Report will be sent back to the employee to make the correction.

Apps for Your Phone:

- Install the ChromeRiver app
- Install the CR Snap app *(used for taking pictures of your receipts and/or additional documentation to attach to expense reports & stored in your receipt gallery)*
- Update the apps as necessary

Email questions to chromeriver@otc.edu

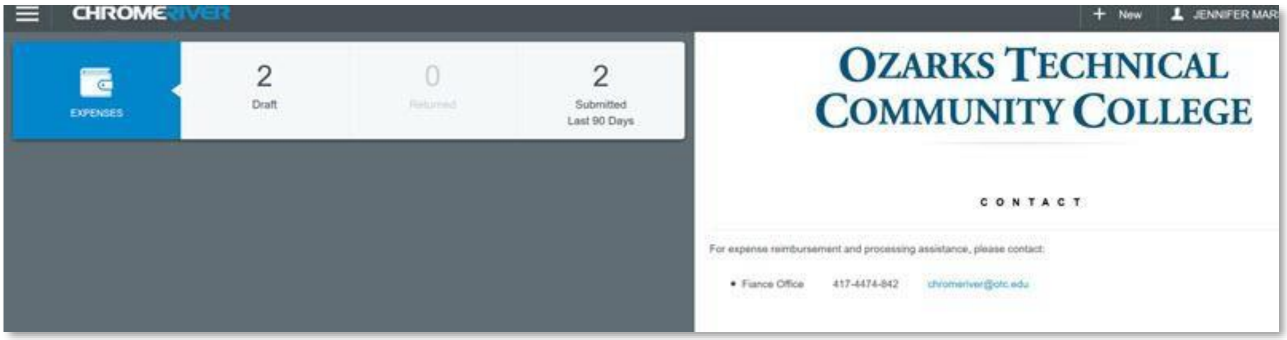
Table of Contents

Accessing Chrome River

- Use the link in MyOTC
- Create a bookmark in your Web Browser Chrome River App on Phone

Dashboard

When logging into Chrome River, informational messages are listed on the right, and your Dashboard is on the left:



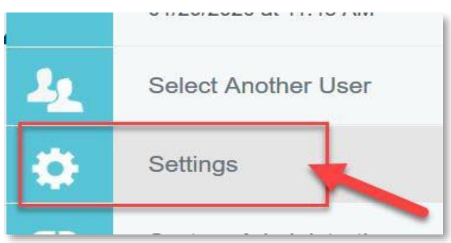
Note: *To get back to the Dashboard at any time, select* ***Chrome River*** *in the top left corner.*

Personal Settings

Email

1) From the **dashboard**, select your **name** in the top right corner:

2) Choose **Settings** from the menu:

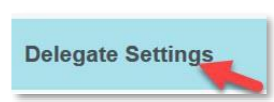


3) Your OTC email is pre-loaded as your **Primary Email**:

NOTE: We recommend always using your OTC email address and not adding an alternative email.

Adding Delegate ***(Someone that can assist you in creating/approving a report.)***

1) Follow steps one and two above.
2) Select **Delegate Settings**: A **Delegate** is someone who has full access to your account. If you would like to assign someone to this role, follow these steps:



a. Select **+Add New Delegates**.

b. Type in the individual's name.

Note: *If you decide to remove the individual from the role, select the* ***X*** *next to their name.*

3) An **Approval Delegate** helps with approvals during a specific time. If you would like to assign someone to this role, follow these steps:

a. Select **+Add Approval Delegate**.

b. Type in the individual's name.

c. Enter **Start Date**, and **End Date**. *(Required)*

d. Select **Save**.

Note: *If you decide to remove the individual from the role, select the* ***X*** *next to their name.*

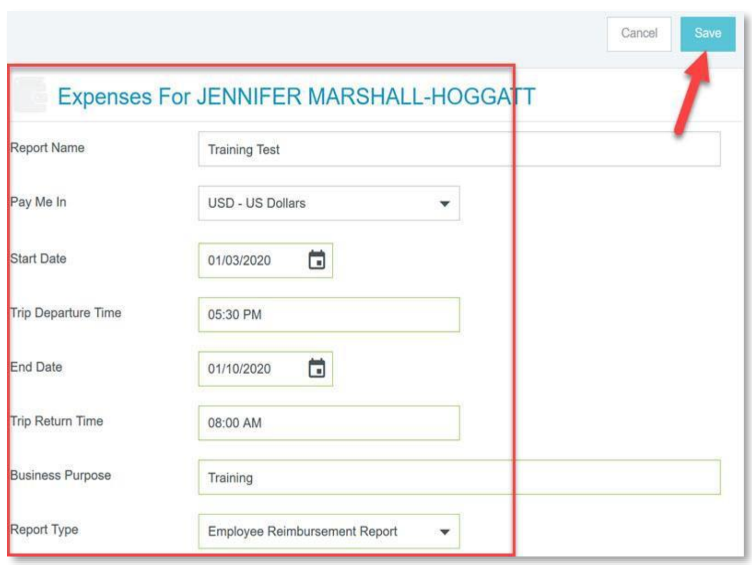
Note: The Approval Delegate and the assigner will receive a notification email about the assignment.

Creating an Expense Report

New Report

1) From the dashboard, select **+ New** in the top right corner:

2) The **Expense Report** sheet will open.



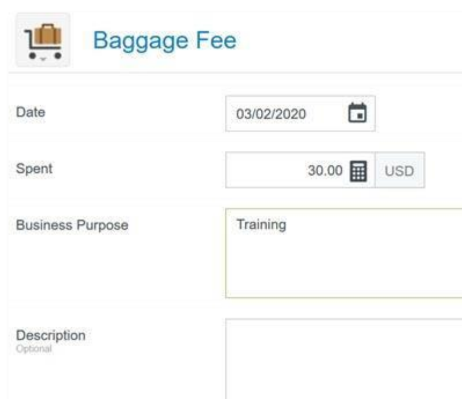
3) Give the report a **Name** *(include the location/name of training).*

4) Enter the following:
   - **Start Date**,
   - **Trip Departure Time**,
   - **End Date**,
   - **Trip Return Time**,
   - **Business Purpose**.
   - Select **Report Type:** (Employee Reimbursement Report)
   - **Click Save** to proceed with the expense report.

Adding Expenses

1) Under the **Add Expenses** area, select the appropriate type of expense:

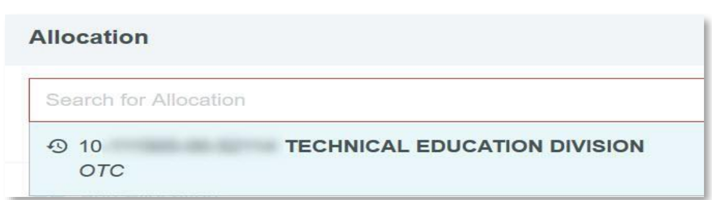
Note: 1) *Some expense types are grouped together under a category (i.e. Air Travel includes airfare, baggage fee & ticket change fee)*. 2) ***If you need to add an additional expense to the report, select the + on the top toolbar.*** 3) *If you encounter a warning message while entering expenses, a response is required to move forward.*



General Expense *(Baggage Fee, Car Rental, Parking, etc.)*

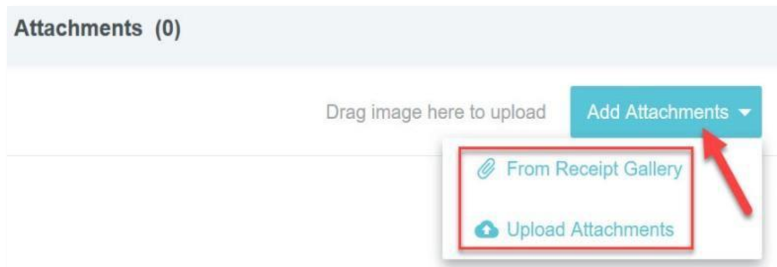
a. Fill in appropriate information *(Date, Spent, Business Purpose (purpose will carry over from the cover page), Description (additional details about the reimbursable expense)*

b. Fill in the **Allocation** *(budget number).* Begin by typing in a budget number or department name; the allocation box will populate:



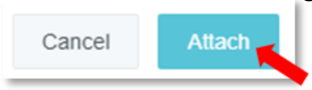
Allocation Table – **Note:** *Watch the allocation number (budget number) in each area of your report. If you are adding several expenses within your report, the budget number will carry over into each expense; adjust accordingly. If the expense will be split with different budget numbers, adjust the split accordingly or you can select to split the expense equally.*

c. Add **Attachments** *(from Receipt Gallery or Upload):*

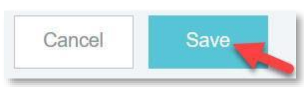


Note: *Receipts can be added to the receipt gallery from the* ***CR Snap*** *app on your phone. You can also upload receipts directly through* ***Upload Attachments****.*

d. Click **Attach** after the image is selected.



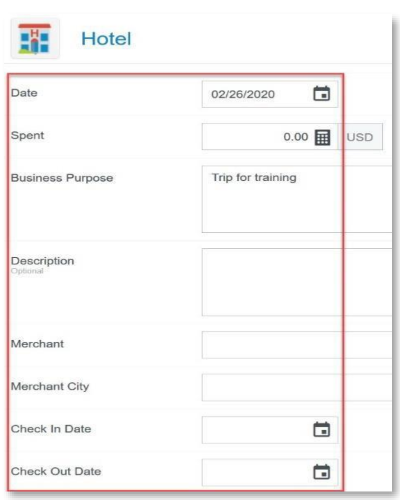
e. Select **Save** at the top of the window after attaching the receipt.



Special Expense (Hotel, Mileage, Meals)

Hotel

a. Enter the **Date**, **Spent** *(total amount reimbursable to you),* **Business Purpose** *(purpose will carry over from the cover page)*, **Description**, **Merchant**, **Merchant City**, **Check In Date**, **Check Out Date**.

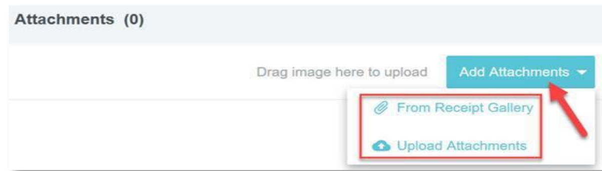


b. Fill in the **Allocation** (*budget number*). Begin by typing in a budget number or department name; the box will populate:

Allocation Table

Note: *Watch the allocation number (budget number) in each area of your report. If you are doing several expenses within your report the budget number will carry over into each expense. Adjust accordingly.*

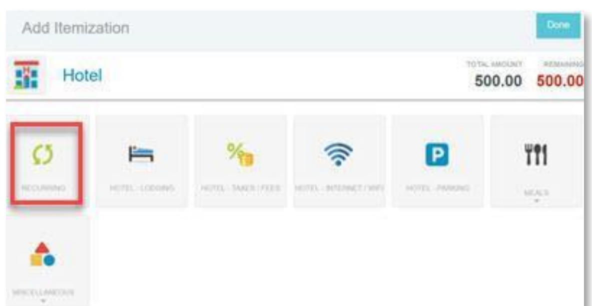
c. Add Attachments (*From Receipt Gallery or Upload*):



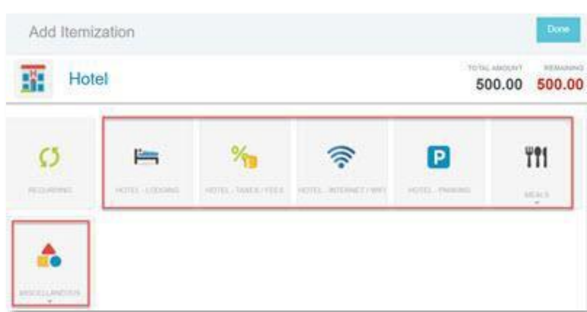
Note: *Receipts can be added to the receipt gallery from the* ***CR Snap*** *app on your phone. You can also upload receipts directly through* ***Upload Attachments****.*

d. Select **Itemize** *(allows you to select expense type)* at the top of the window to itemize your expenses:

i. **Recurring** allows you to enter expenses for nights the room rate, taxes, and other fees are the same:



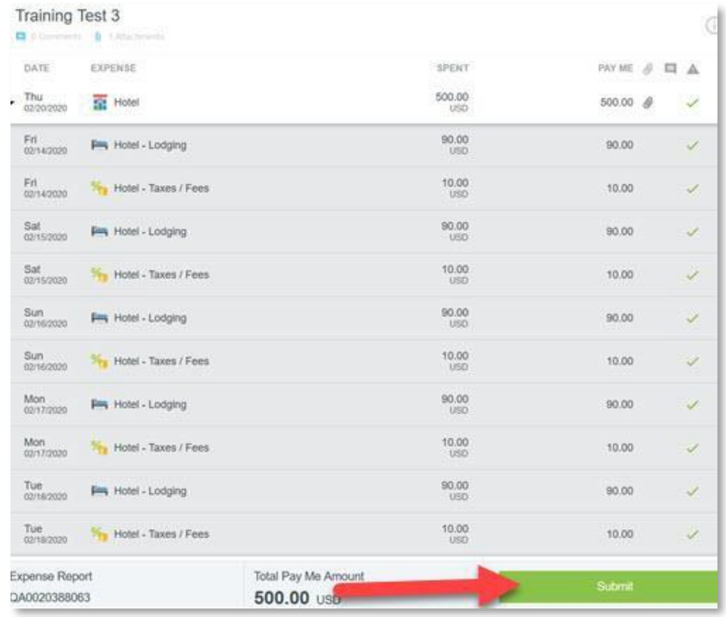
ii. If there are different daily rates, use the individual **expense tiles** to itemize:



Note: *Make sure all expenses match the total amount.*

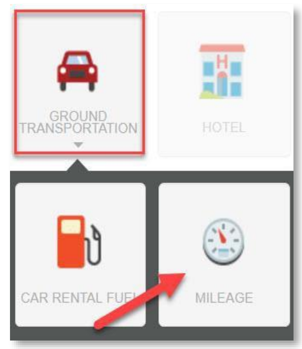
iii. Select **Save** in each area, and then **Done** in the itemization box when complete.

iv. A report will show the itemization. Select **Submit** on the report when complete:

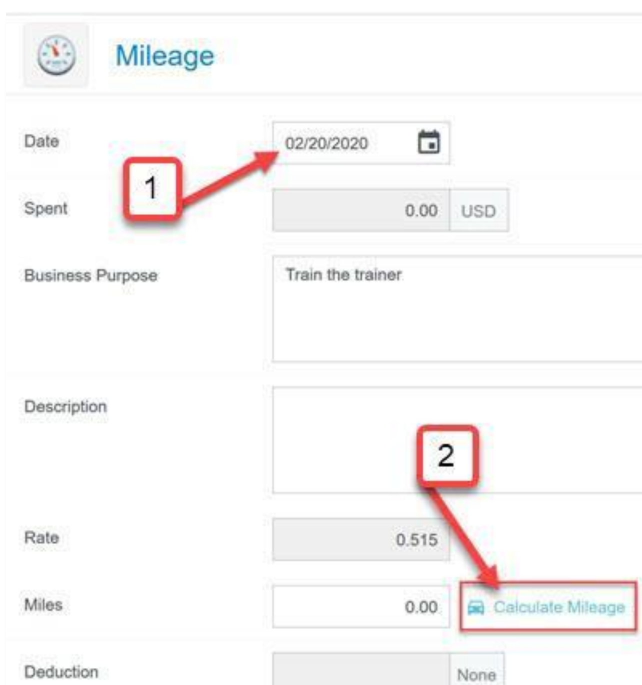


Mileage

a. **Mileage** is located under **Ground Transportation**:

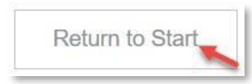


b. Enter the **Date**, **Business Purpose** and then move to **Calculate Mileage**:

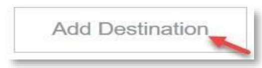


c. Enter beginning and ending location. Google will automatically calculate the mileage:

d. If you are making a **round trip**, select **Return to Start** to calculate entire trip:

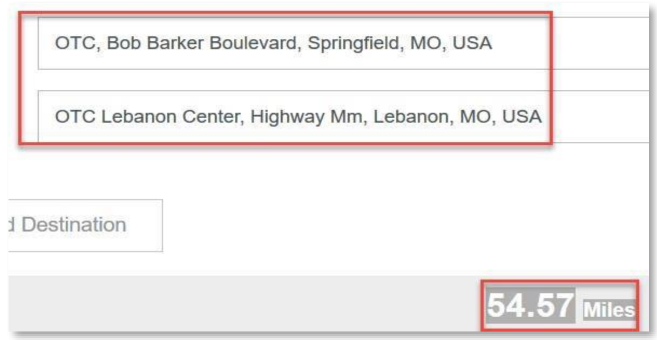


f. If you are traveling to **several locations**, use the **Add Destination** button to calculate entire trip:



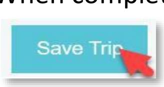
g. If you need to adjust the route, you can click on the line in the map and drag it.

Note: ***The recommendation is to claim the main route, and not adjust the route.***

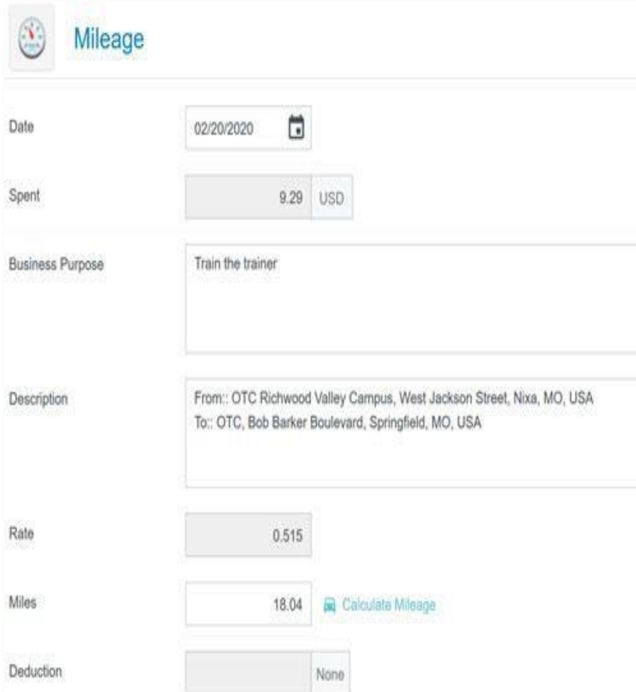


h. If a portion of the trip needs to be removed by **distance or amount**, use the **Deduction** field and select **distance** or **amount**. Comments can be entered to briefly describe the deduction.

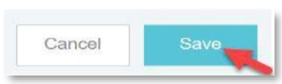
i. When complete, choose **Save Trip**:



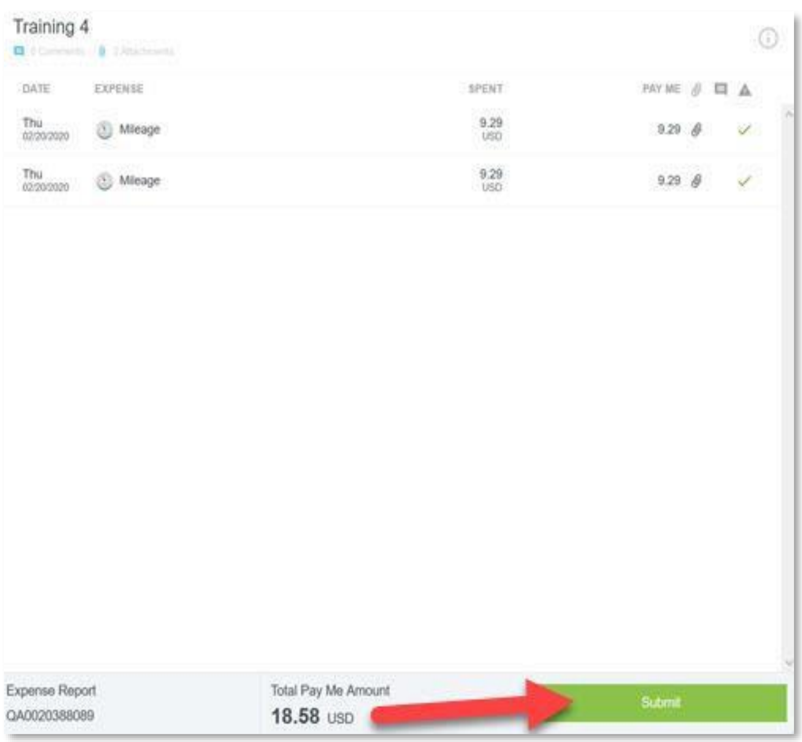
j. The mileage will calculate based on the mileage/route entered:



k. Select **Save**:



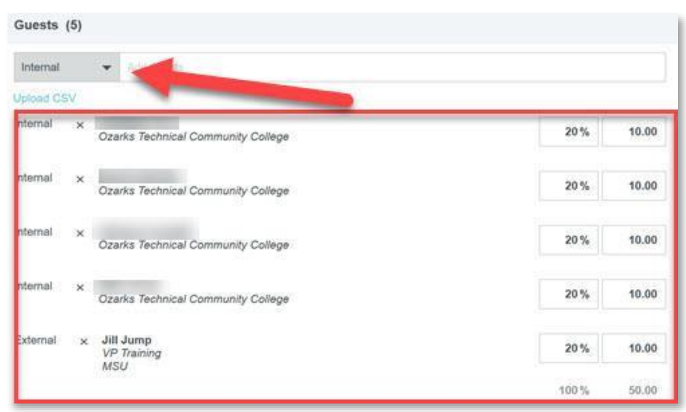
l. Verify the information, and **Submit** the report:



Meals

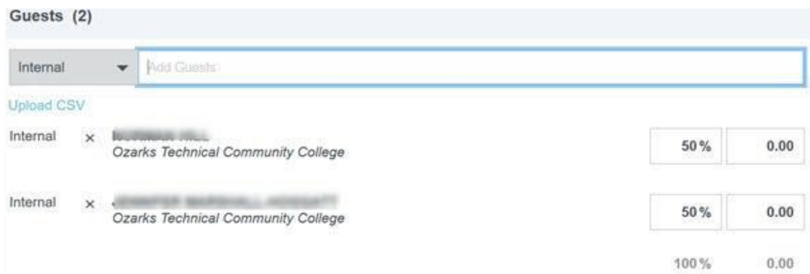
a. Under **Meals**, choose the applicable category.

- <u>**Meals:**</u> *are for when the employee is attending training/conference and an allowable individual meal is purchased.*
  - ➢ Fill in the **Date**, **Spent**, **Business Purpose**, **Description**, **Merchant**, **Type**, **Number of Attendees**, **Allocation**, & **Add Attachment** from the Receipt Gallery or Upload Attachments *(Receipt)*.
  - ➢ Select **Save**.
- <u>**Business Meals:**</u> *are meals purchased for a business meeting including a group of people internal/external.*
  - ➢ Fill in **Date, Spent** amount, **Business Purpose**, **Description**, **Merchant**, **Type**, **Number of Attendees**, & **Allocation**.
  - ➢ Fill in the list of **Guests** *(Use the drop-down box to note if the individual is **Internal/External**. If **Internal** the box will populate when you begin typing the name. If **External**, fill in the name and information. Add the external guest to include First Name, Last Name, Title, and Company Name. This information will be saved for future use as well.)*.



  - ➢ Click **Add** when the external guest information is complete.
- ➢ **Add Attachment** and select **Save**.

- **<u>Group Meal Travel:</u>** *are meals when attending training/conference and purchase meal for group of employees (internal only)*:
  - Fill in the **Date, Spent** amount, **Business Purpose**, **Description**, **Merchant**, **Type**, **Number of Attendees**, & **Allocation**.
  - Fill in all **Internal Guests** *(the name will populate when you begin typing the name in the box)*:



  - If there is an individual in the group from OTC, but a different department, you can adjust the **Allocation** for the expense by selecting **Add Allocation**:

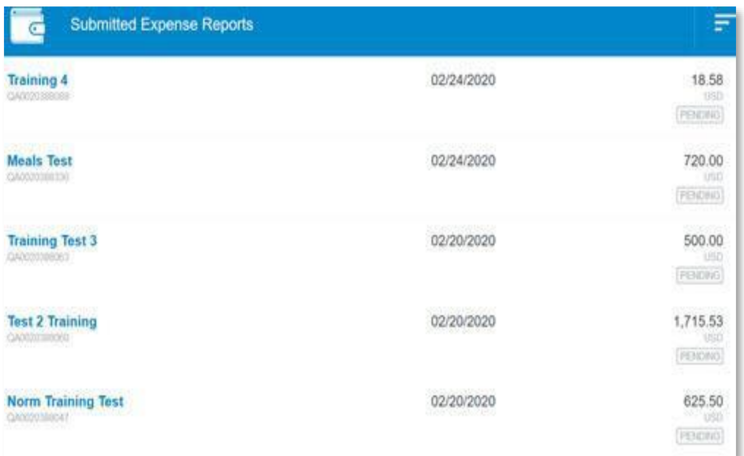
Note: *Use the **Split Equally** button, or adjust the amounts directly.*

User Information

Expense Report Approval Process:

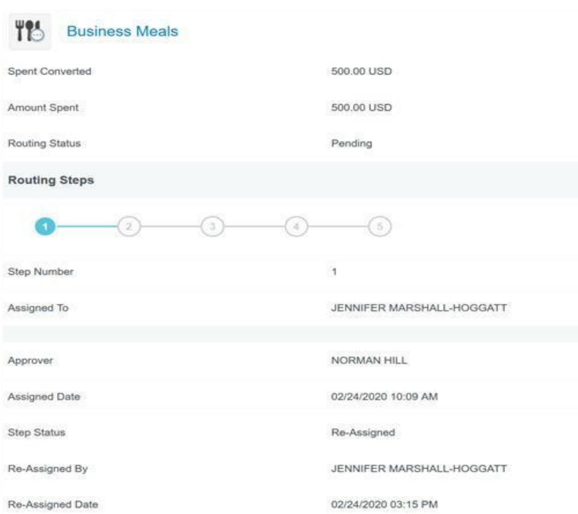
1) On your dashboard, select **Submitted Last 90 days**:

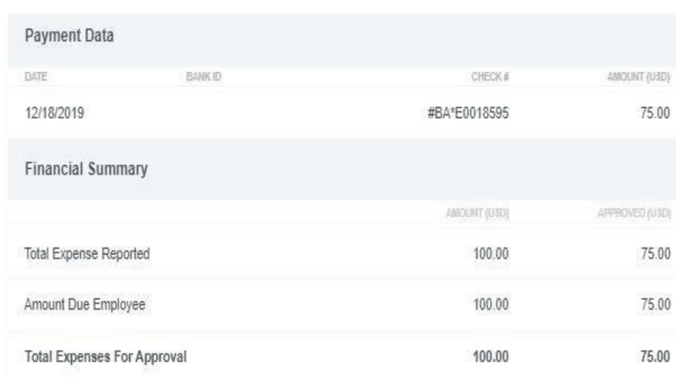
2) A window will open with all your reports submitted within the last 90 days. Here you can see where it is in the process:



3) To open a specific report, double click on the report. You can **Open** the report, create a **PDF** hard copy, select **Tracking** to see where the report is in the process, or **Recall** to move the report to a draft & edit:

- In **Tracking**, you can select the line item and get more detailed information in the routing process.
- Once in **Payment** status, you can view the payment details.



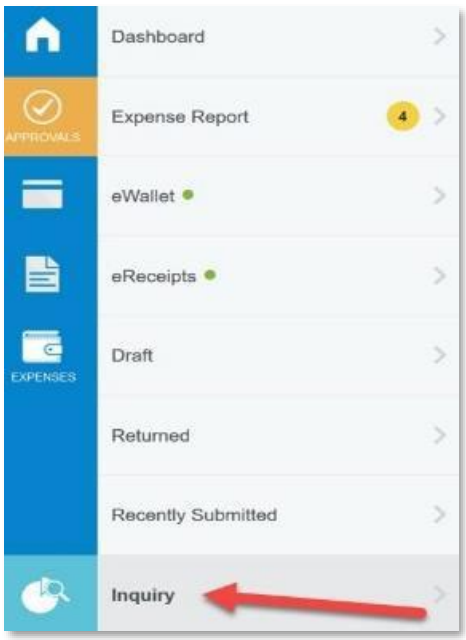


Report Options

***Running Reports:* (for yourself, or for someone as their delegate)**

1) Click on the **menu** in top left corner:

2) Select **Inquiry**:



3) Under **Expense**, you will see the list of reports available:

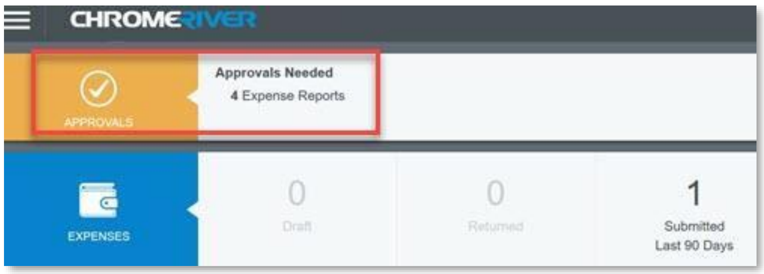
Adding Receipts to Chrome River

1) CR Snap App
2) Receipt Photo with Phone
3) Scan Receipts – Email as PDF

Approvals

Manager Approval (via Chrome River):

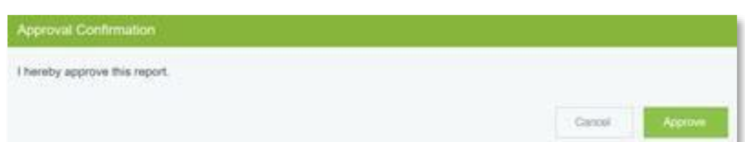
1) **APPROVALS** are listed in the Dashboard area:



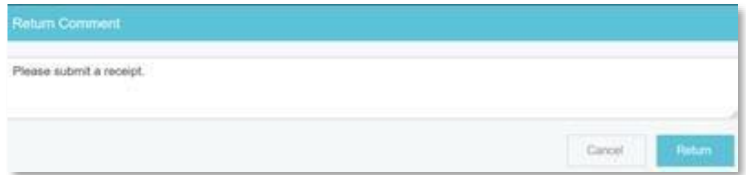
2) Double click on the **Expense Report** to detail into the **Approvals Needed**:

3) Click on each expense report to **Open**, create **PDF**, look at the **Tracking**, **Return**, or **Approve**:

a. If the expense report is ready to approve, select **Approve**, and **Approve** again.



b. If the report needs to be returned to the submitter for revision(s), select **Return** and enter a **Return Comment** *(required)*.



Manager Approval (via Email):

1) An **Action Required** email will be sent to the approving manager. The notification will show that an expense report needs to be approved.


ACTION REQUIRED Chrome River

Expense Report for	CHRISTOPHER GUTHRIE
Created by	CHRISTINA CANNELL
Report Name	SimGhost 2019 Conference
Submit Date	08/27/2019
Expense Dates	08/01/2019 - 08/02/2019
Adjusted Expenses	13.91 USD
Prior Approvers	TERI SUMMERFIELD [11/14/2019 GMT] TERI SUMMERFIELD [08/28/2019 GMT]

Account Summary			Amount (USD)
10-110101-20	Turf and Landscape Management	RICHWOOD VALLEY CAMPUS	5.46
10-115100-00	ALLIED HEALTH DIVISION	OTC	3.00
10-460000-25	INSTRUCTIONAL ADMINISTRATION	TABLE ROCK CAMPUS	5.45

Expense Details

2) Scroll through the notification to review the information. At the bottom of the email, there will be an **Accept** and **Return** option:

a. If the expense is correct, choose **Accept**:

b. If there are adjustments that need to be made, select **Return**:

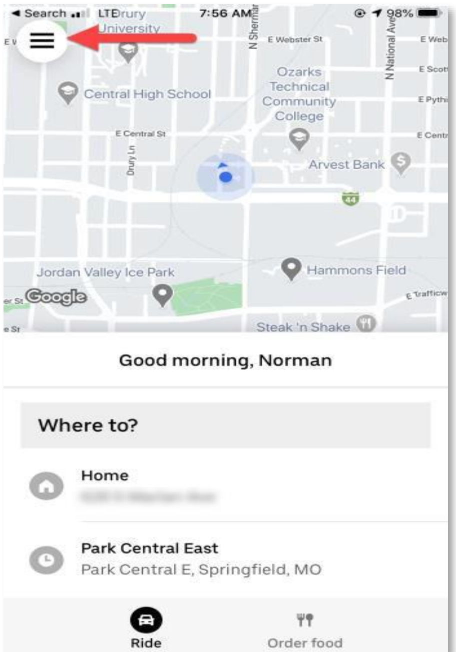
Allocation Table

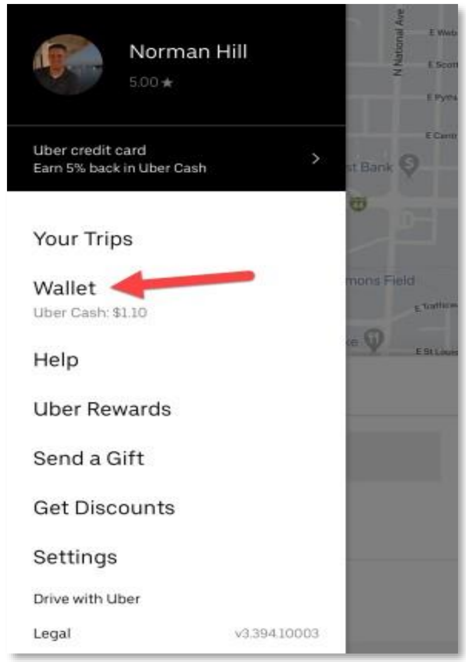
Budget Code (*Last 5 Digits)*	Item
52114	Air Travel, Ground Transportation, Hotel, Meals, Tips
52116	Professional Memberships/Dues, Professional Development
52713	Postage
53111	Office Supplies, Copies, Printing
53118	Educational Supplies

Linking Chrome River to Uber

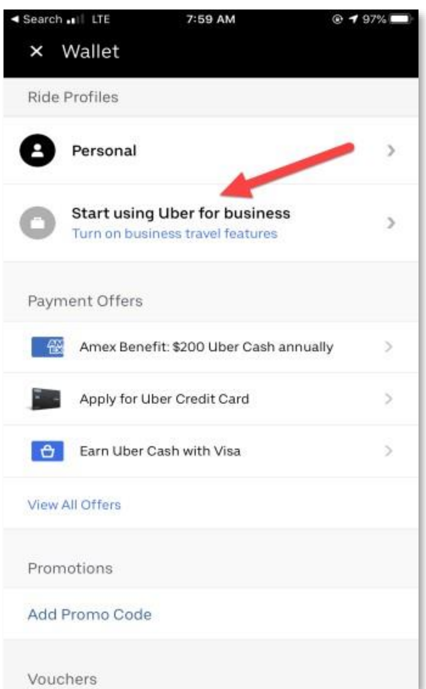
Uber can be linked to Chrome River to record the travel expense directly to an expense report.

1) Open the **Uber app**, and select the **three lines** in the top left corner and then select **Wallet**.

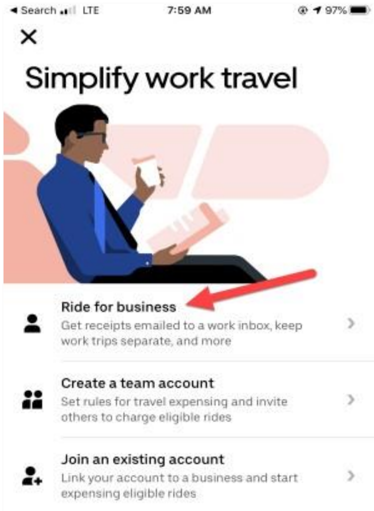


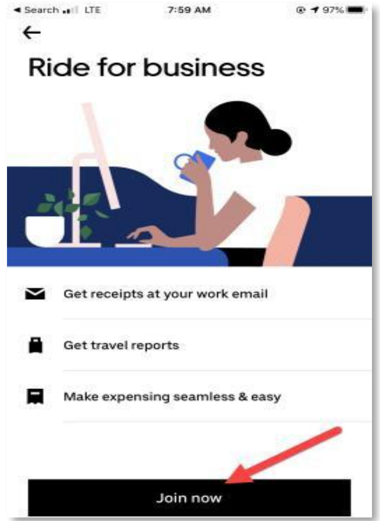


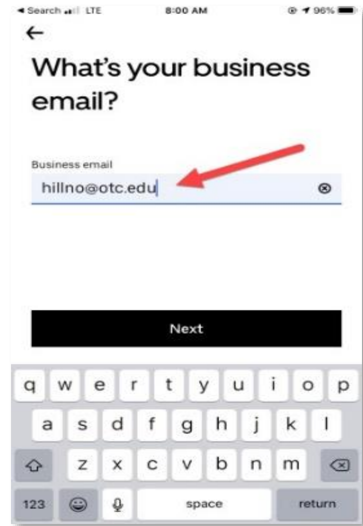
2) Choose **Start using Uber for business**



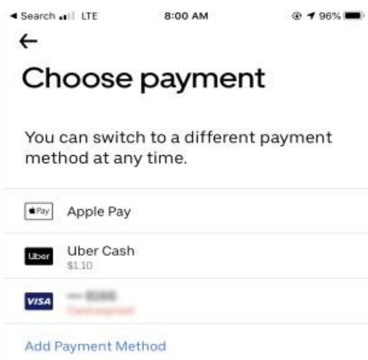
3) Click **Ride for business** and select **Join now** and enter your **OTC email address**

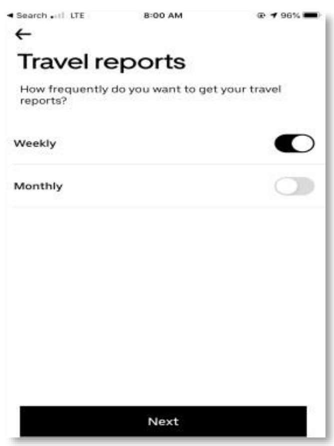




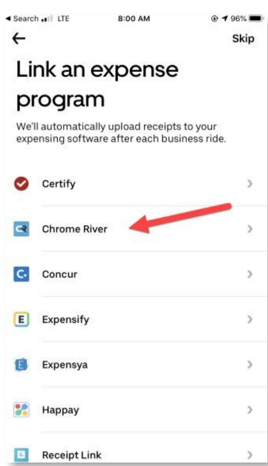


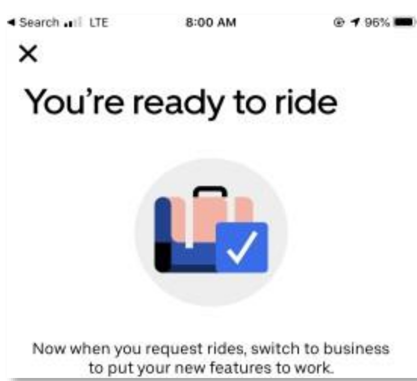
4) Choose **payment** method and then select the frequency to receive reports ***(weekly** or **monthly)***, then choose **Next**





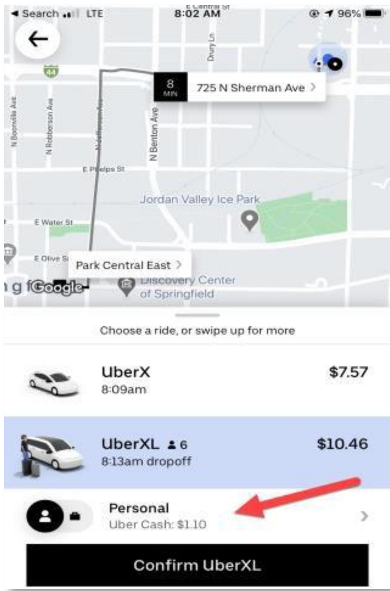
5) Choose **Chrome River** – At this point, the process is complete & You're Ready!





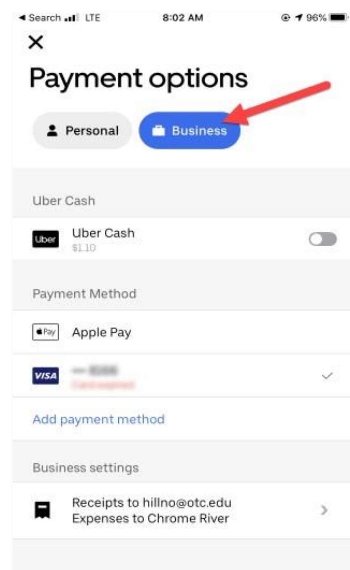
Chrome River – Uber Use:

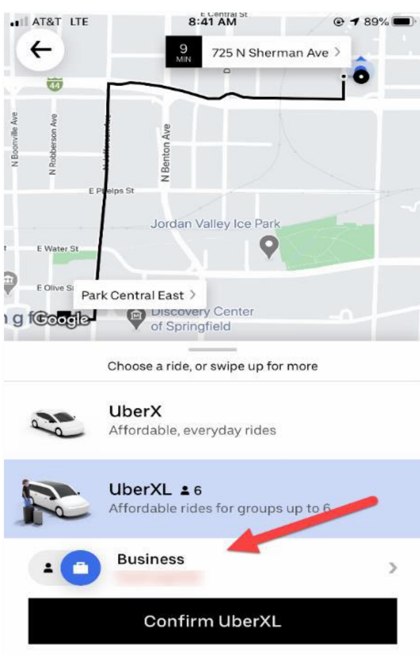
1) Enter destination, select level of ride, then choose business account before confirming:



2) Choose **Business**. *(**Note:** Verify your **OTC email** and **Chrome River** under **Business settings**.)*

3) Verify that **Business** is selected and confirm the **Uber ride**. The Uber transaction will end up in your Chrome River account.

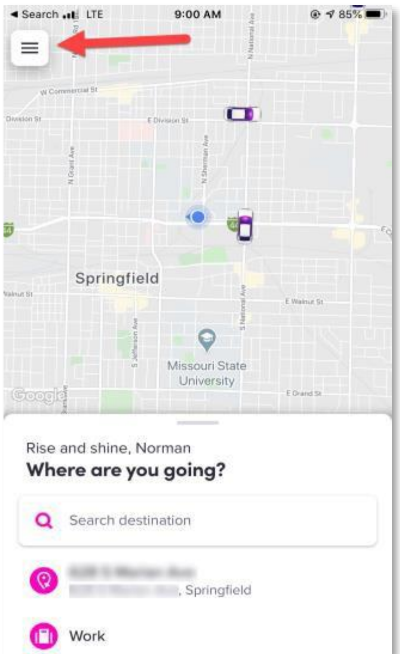


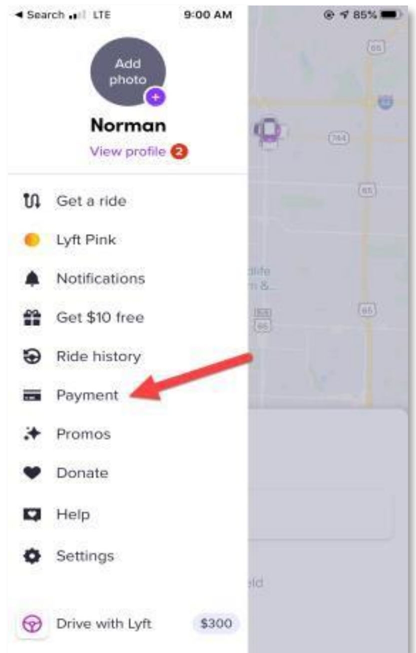


Linking Chrome River to Lyft

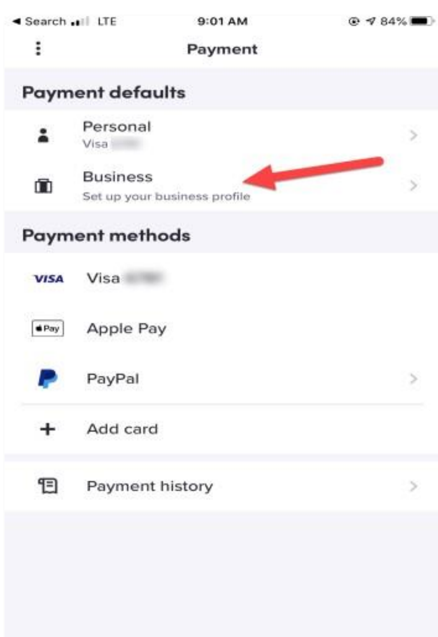
Just like Uber, Lyft can also be linked to Chrome River to record the travel expense directly to an expense report.

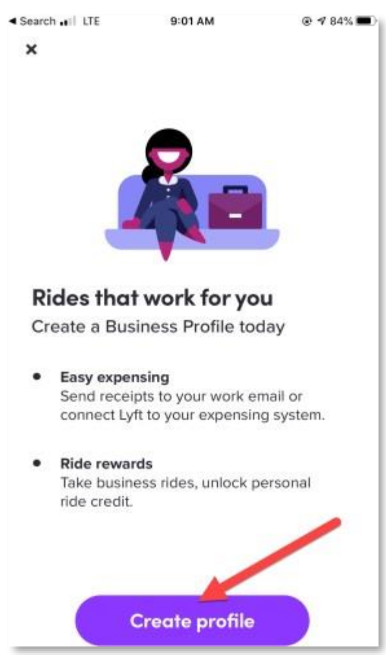
1) Open the **Lyft app** on your phone, and select the menu in the top-left corner, then select **Payment**:





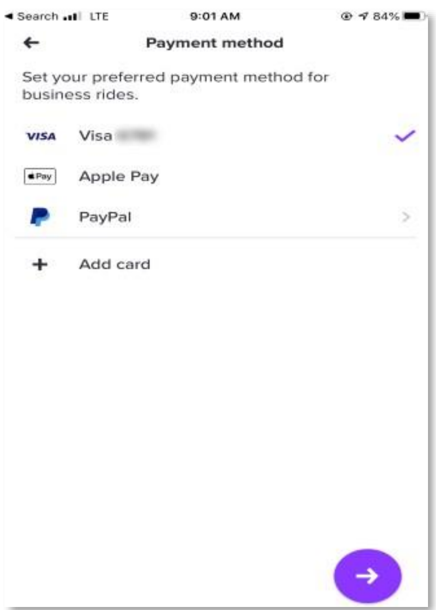
2) Choose **Business** and then click on **Create Profile** to setup a business profile:

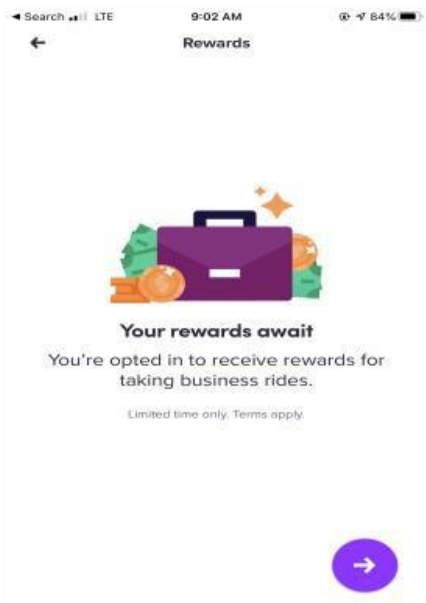




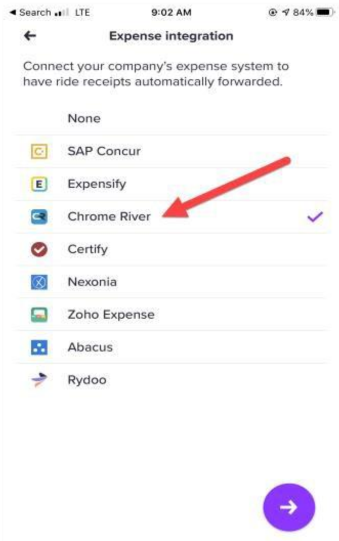
3) Enter your **OTC email address**:

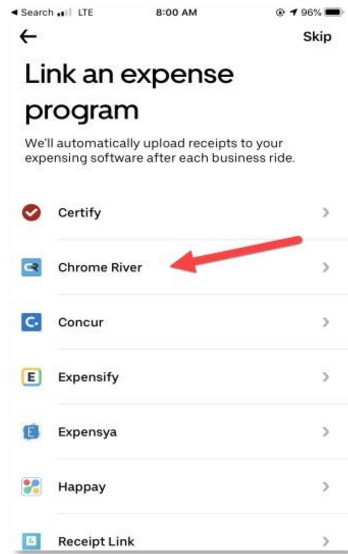
4) Enter **Payment method** and choose **Rewards**:



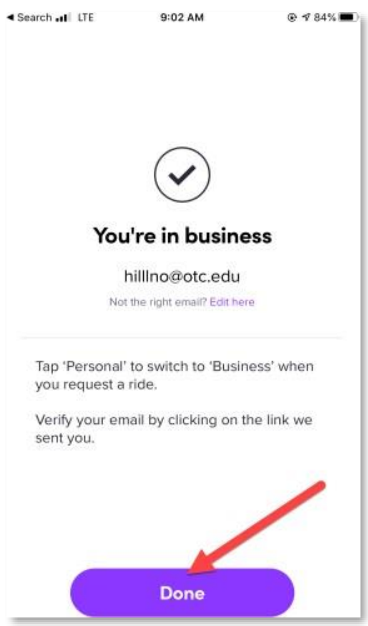


5) Select **Chrome River,** and then to **link an expense program** choose **Chrome River** again and select **Done –** You're ready!:

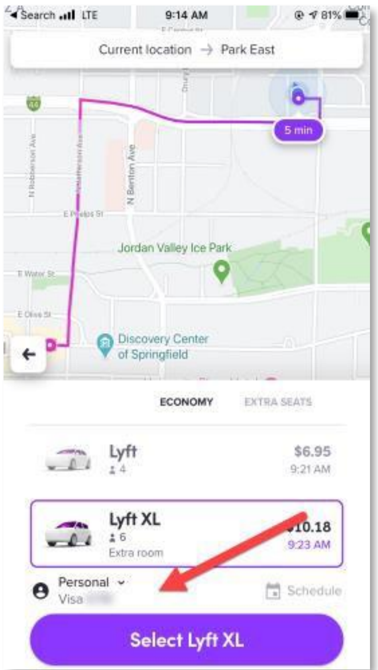




6) You are ready! Select **Done**:

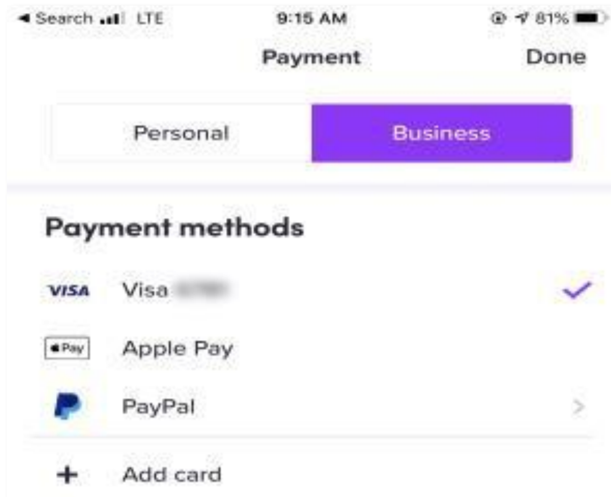


Chrome River – Lyft Use:



1) Enter destination then select your **ride level**. Choose **business account**.

2) Choose **Business**, then **payment method**:



3) Verify **business account** is selected and confirm. The transaction will end up in your Chrome River account.