



# Chrome River User Manual

## GLOSSARY

### Approval Delegate

An approval delegate is a person designated by you to temporarily assume your approval role in Chrome River. Approval delegates are assigned using the “settings” menu in Chrome River and are set for a specified period of time. During the specified dates, any reports sent to the user for approval will instead be routed to the assigned approval delegate.

### Border City

The University has designated any city located within 200 miles of the borders of Kansas as a border city. Boarder city travel does not require a Pre-Approval

### Business Purpose

A business purpose is the primary reason for your university-sponsored travel. Once entered on a report, the text should automatically appear in the business purpose field for each relevant expense type. This field differs from “Description” in that it is more general and provides an over-arching purpose for the travel.

### Company Information Page

The company information page is located on the Chrome River Landing page. This page contains WSU’s notices, updates, links to additional resources, and contact information.

### Compliance Rules

Guidelines based on WSU’s policies and procedures.

### Dashboard

Snap shot of your approval, pre-approval report, and expense report activity.

### Delegate

A delegate is a person assigned by the expense owner/traveler to create and submit reports on their behalf. Delegates are assigned by the expense owner using the “Settings” menu. Once set, a delegate remains in that role until removed by the expense owner. When an assigned delegate navigates to the expense owner’s Chrome River, they are able to view, edit, and create as though they were the expense owner. Any reports submitted by a delegate will first be routed to the expense owner for approval before moving through the typical workflow.



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## Description (Expense Detail)

A description of an expense is meant to provide greater detail of the expense for clarity in the approval process. Any special circumstances or relevant details should be included in this field. This differs from the "Business Purpose" which is a more generalized reason for the travel. A description is mandatory for any expense-type of "other."

## E-Wallet

The E-Wallet is where you will find all of your transactions including UMB Pcard Expense transactions, receipts submitted via email, and e-receipts uploaded directly to the app (these will appear in the **Receipt Gallery** within the E-Wallet).

## Expense Owner

The expense owner is the person who incurs the expense. This person may differ from the traveler or the delegate. If the expense is incurred on a university pcard, the expense owner is the employee to whom the card is assigned. If the expense was incurred using personal funds, it is the person who paid the expense using their own cash or credit.

## Funding

The funding area houses the valid Fund-Org-Program combination values. Once selected, a second field appears directly below the selected combination which houses the valid account codes.

## Non-Reimbursable Personal Expense

Non-reimbursable personal expenses are expenses incurred during travel activities that are not reimbursable to the employee according to University policy. These may include expenses such as personal meal or entertainment activities included on a hotel bill or additional personal stops using transportation purposes. In such cases, it may be necessary to report the expense to match receipt/bill amounts, but mark the item as a non-reimbursable personal expense to prevent the amount from being added to the reimbursement total.

## Pre-Approval

A pre-approval report (formerly known as Travel Authorization) is an explanation of proposed business-related travel including a good-faith estimate of expenses. It is mandatory that a pre-approval report for out-of-state or international travel must be submitted and fully approved prior to any travel-related expenses being incurred.

## Recall

This feature allow expense owners and their delegates to return any expense report to Draft status as long as none of the line items have been fully approved.



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## Receipt Gallery

The **Receipt Gallery** is the area in Chrome River where images that have been directly uploaded through the app are stored. This is accessible by choosing eWallet or eReceipts from the main menu or within the expense report by tapping the + button to add new expenses.

## Report Header

A report header is the first page completed for any pre-approval or expense report that provides general information about what is included in the report (e.g., title, dates, report type, etc.)

## Report Name

The Report Name field appears on the report header pages for both Pre-Approval and Expense Reports.

## Report Type

The Report Type field indicates the type of pre-approval or expense report and generates the appropriate routing and compliance rules for that report type. Pre-Approval and Expense Reports have two possible types 1) Pcard Reconciliation (Non-Travel), and 2) Travel.

## Single Sign On (SSO)

Allows you to use one set of login credentials to access a number of different applications.

## Tiles

Expense categories

## Tiles with Down Arrow

Expenses with subcategories

## Tracking

Displays where the Pre-Approval, Expense Reports, or Pcard Reconciliation reports are in the approval process.

## Violation

Compliance rule that must be addressed before you can submit the Pre-Approval, Expense, or Pcard Reconciliation report.

## Warning

Compliance rule that allow you to add an explanation in order to submit the Pre-Approval, Expense, or Pcard Reconciliation report