BGSU
Bowling Green State University

CHROME RIVER

February 24, 2022

Chrome River Approver Manual

BGSU uses Chrome River software for university employee expense reports for both pcard reconciliation and reimbursement requests. This system aims to make the process for reconciling financial transactions efficient and user friendly with electronic receipt options, exchange rates, expense mapping, electronic approvals, and quick reimbursements.

Table of Contents

Introduction 3
Logging In to Chrome River 3
Approve in Chrome River 3
Tracking 5
Return 5
Approve 5
Approve via Email 8
Approval Delegate 9
Approval Sort Options 10

Introduction

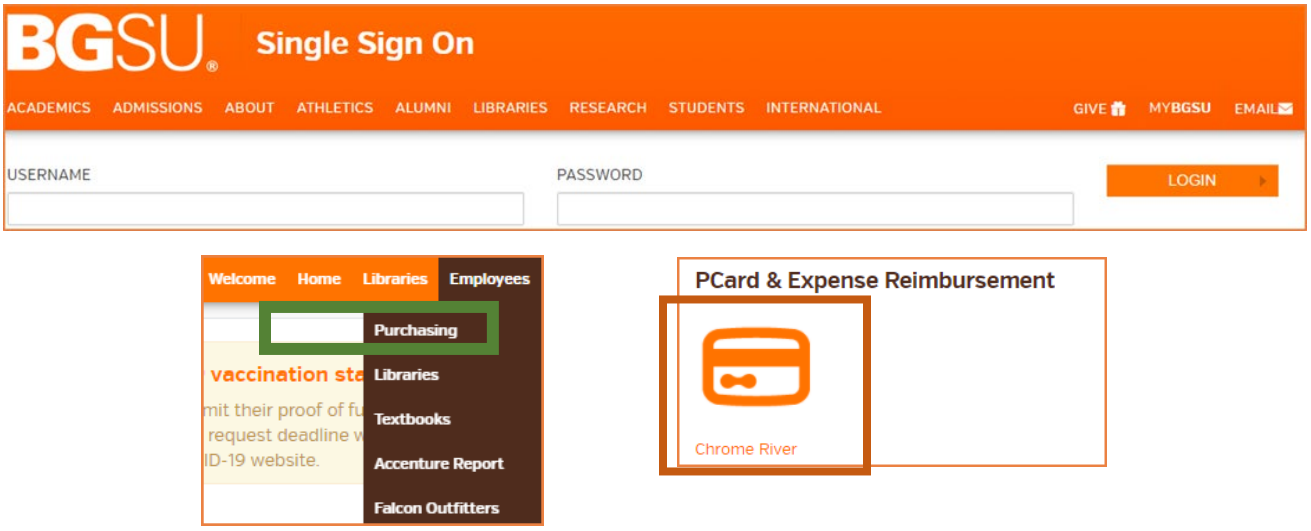
This manual is specific to Chrome River and serves as guidance from a systems perspective. Information and policies regarding travel and reimbursements can be located on the Controller's Office website. The Pcard Manual can be located on the Purchasing website.

Reports created in Chrome River are electronically routed to the appropriate approvers by email based on the budget used on the report. The system contains policy direction that includes violation warnings. Should any of these warnings be identified, it will open a text box requiring additional information pertaining to the potential violation. Additional approvals are required via the electronic workflow for certain Pcard transactions or reimbursable expenses. Approvers will also be alerted that a report has a potential policy violation.

Expenses entered in Chrome River will not post to the budget until all necessary approvers have approved the report. Requests for reimbursements cannot be processed on the same report with Pcard transactions.

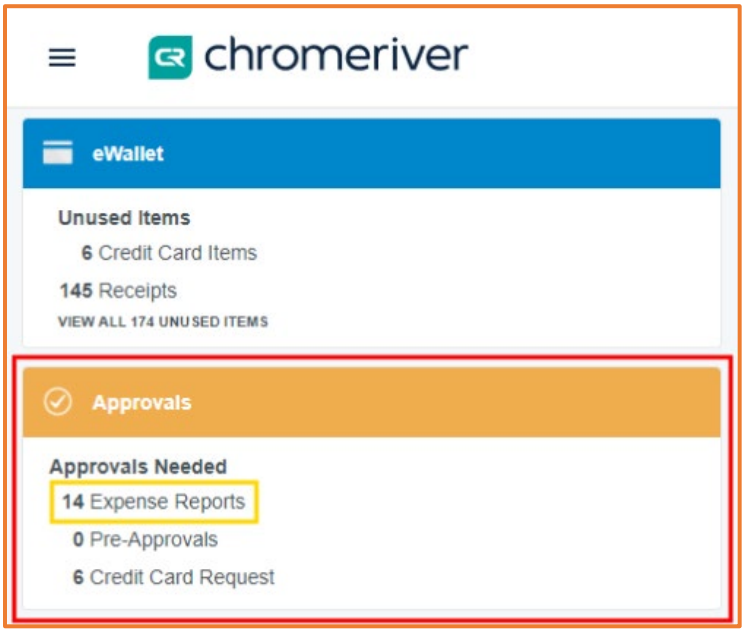
Logging In to Chrome River

To access Chrome River, visit https://my.bgsu.edu. Use your University username and password to log in. If you have difficulty accessing the site, email tbachma@bgsu.edu for assistance.

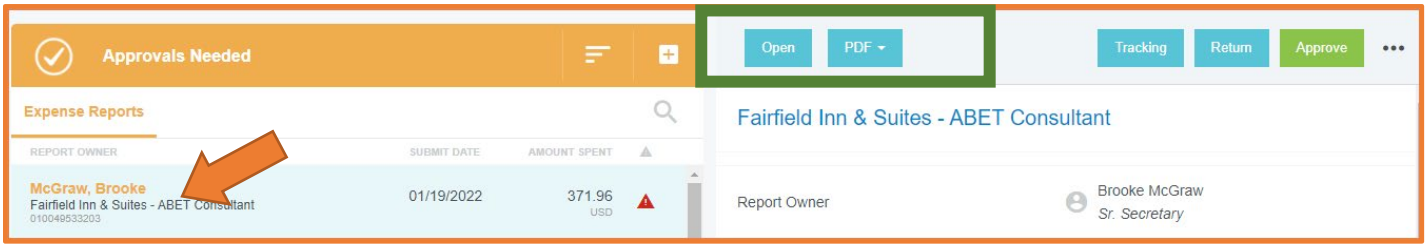


Approve in Chrome River

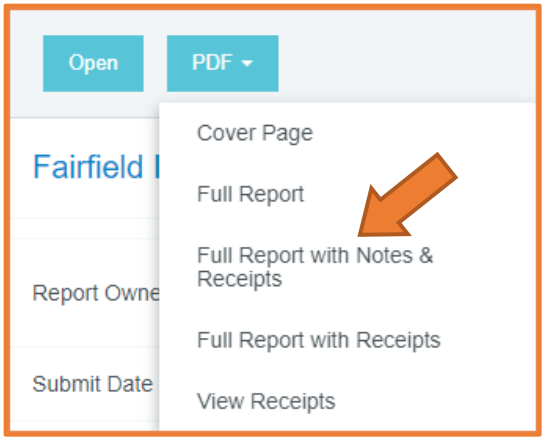
Items awaiting approval, are visible in yellow notification bar on the Dashboard. Click on the number of expense reports to be taken to the Approvals list.



Select a report in the list. Click Open or PDF.

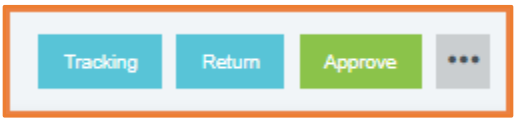


The PDF option shows a Full Report with Notes & Receipts to easily view all information and attachments about the expenses.



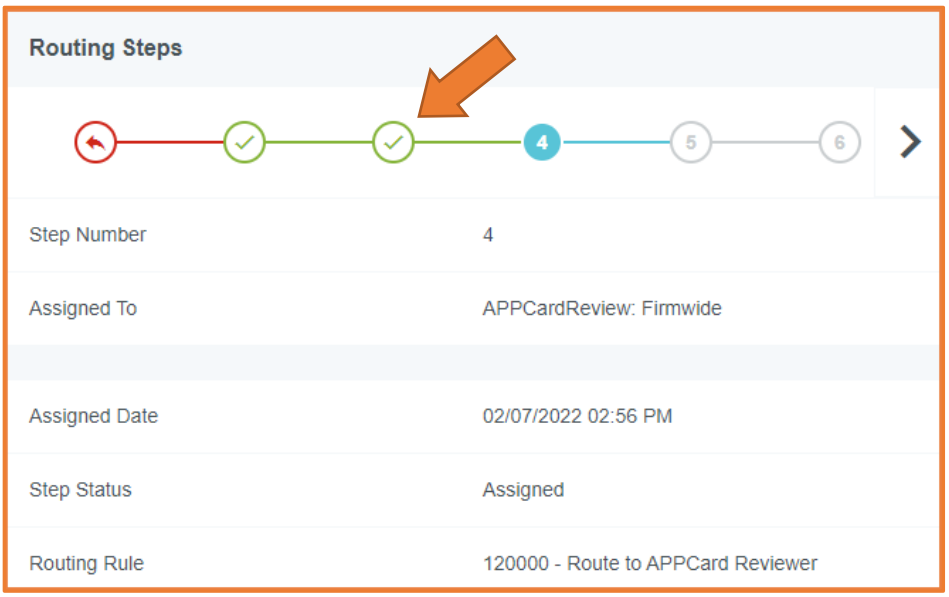
The PDF will open in another window. Select the document to view, and the Chrome River tab to return to the approval screen.

Selecting RETURN or APPROVE in the preview immediately rejects or approves all line items on the report.



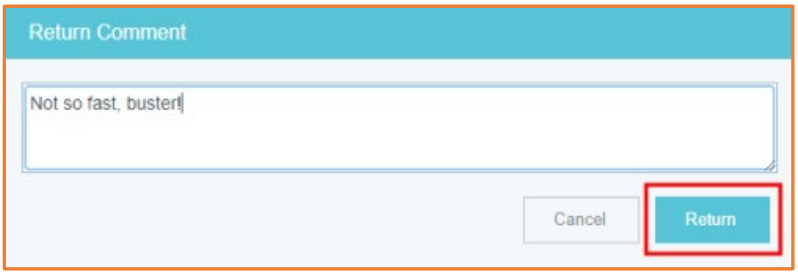
Tracking

Tracking shows the previous approval history of this report. Select the circles to review the name of the previous or future approver.



Return

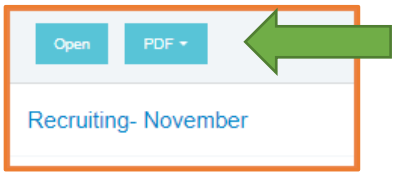
Click RETURN. Complete the required comments about why the report is being returned and select RETURN. All the line items on the report will be sent back to the expense owner.



Approve

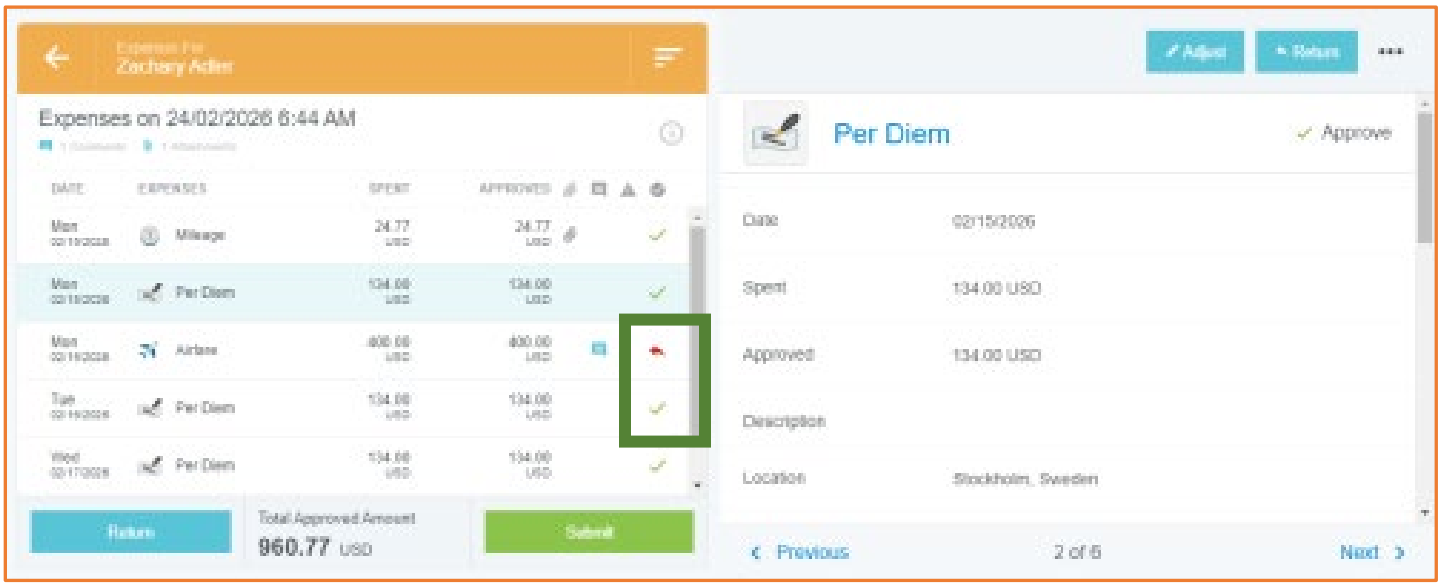
Click APPROVE again to confirm. All the line items on the report will move to the next step in the approval process.

To return line items individually, open the report by double-clicking on it in the Approvals list. Select OPEN.

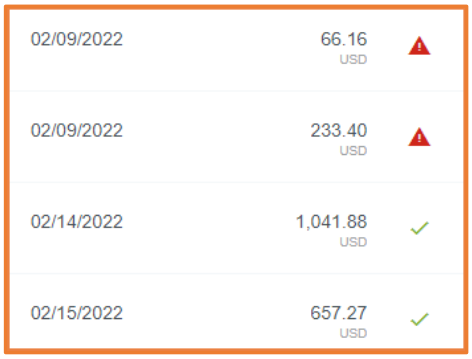


Then, select the line to be Returned or Adjusted.

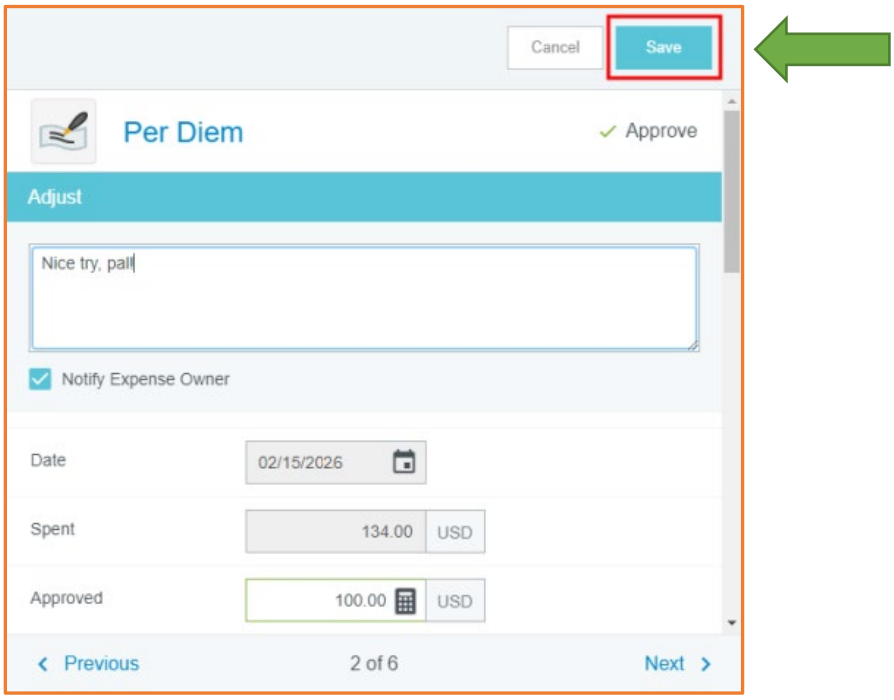
Unless they have compliance warnings, line items are marked with a green check mark by default. If the line-item has been returned or reassigned, it will be noted by a red arrow.



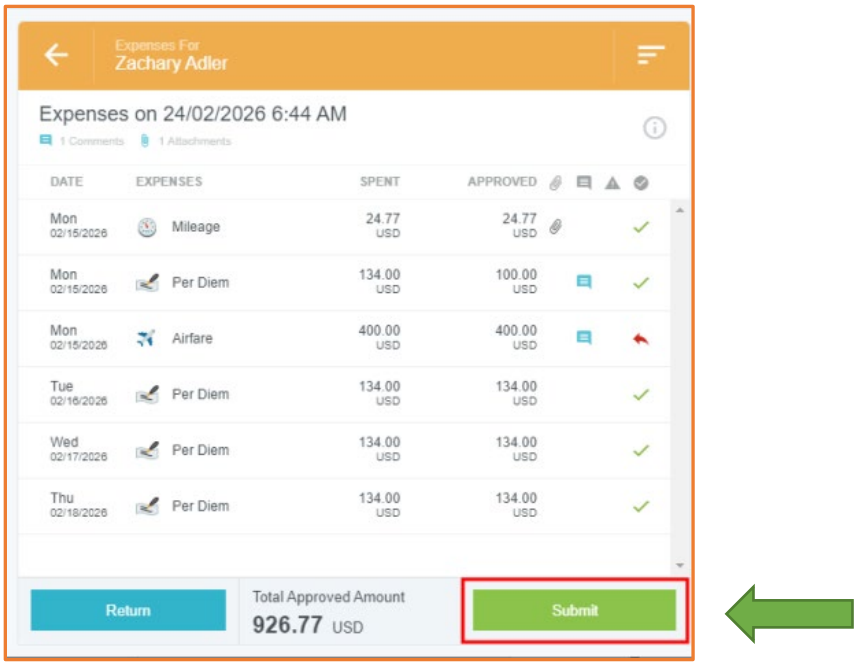
Reports with red triangle mean there is a compliance warning on the report. Select Open, then select the triangle to view the warning.



Clicking ADJUST will allow the approver to change certain information on the line item. Changes require a note to be added. The approver may decide whether to notify the expense owner of the adjustment.
Click SAVE.



When finished adjusting or returning items, click SUBMIT. Do not click RETURN unless you wish to return all the line items, even those you approved or adjusted.



Approve via Email

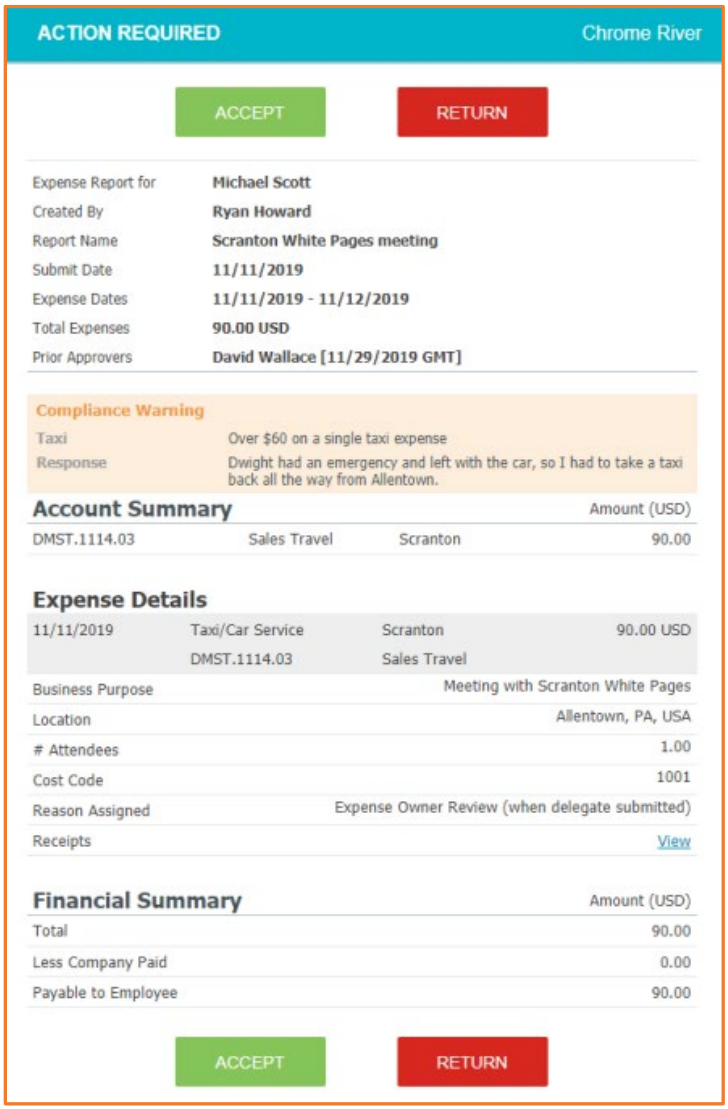
Chrome River will generate emails to the approvers when an expense report is ready for approval. Approvers may approve or return ALL expenses via email—any line-item adjustments must be made in Chrome River online.

- Accept: This creates a new email that must be sent to instantly approve all line items on the report.
- Return: This creates a new email that must be sent to instantly reject all line items on the report.

To add questions or comments, simply type them in the body of the email, above the forwarded text, then click SEND.

Email approvals may only be sent from your primary Chrome River account email address.

Note: Certain mobile devices may auto-populate the email "From" field with the default email address for the device, rather than the email address to which the approval notification was sent. Be sure the "From" field contains your primary Chrome River account email address before you click SEND on your approval or return email.



ACTION REQUIRED Chrome River

ACCEPT RETURN

Expense Report for	**Michael Scott**
Created By	**Ryan Howard**
Report Name	**Scranton White Pages meeting**
Submit Date	**11/11/2019**
Expense Dates	**11/11/2019 - 11/12/2019**
Total Expenses	**90.00 USD**
Prior Approvers	**David Wallace [11/29/2019 GMT]**

Compliance Warning

Taxi	Over $60 on a single taxi expense
Response	Dwight had an emergency and left with the car, so I had to take a taxi back all the way from Allentown.

Account Summary Amount (USD)

DMST.1114.03	Sales Travel	Scranton	90.00

Expense Details

11/11/2019	Taxi/Car Service	Scranton	90.00 USD
	DMST.1114.03	Sales Travel	
Business Purpose			Meeting with Scranton White Pages
Location			Allentown, PA, USA
# Attendees			1.00
Cost Code			1001
Reason Assigned			Expense Owner Review (when delegate submitted)
Receipts			View

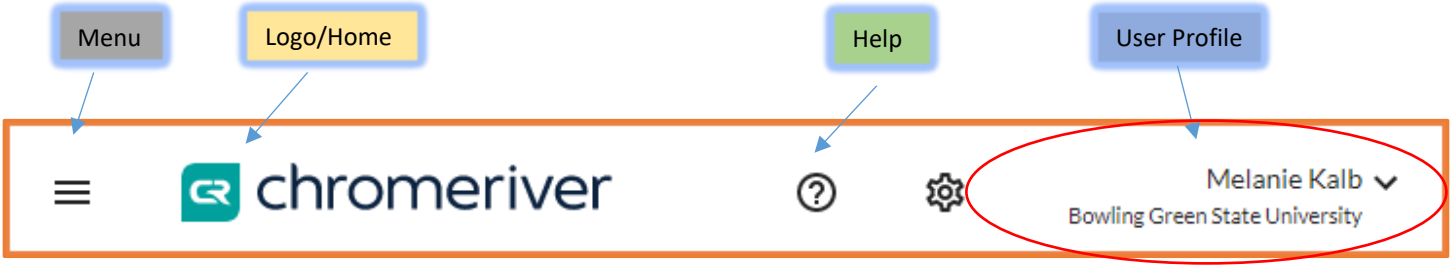
Financial Summary Amount (USD)

Total	90.00
Less Company Paid	0.00
Payable to Employee	90.00

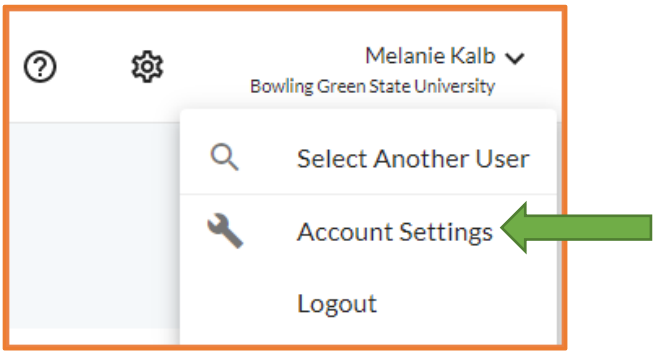
ACCEPT RETURN

Approval Delegate

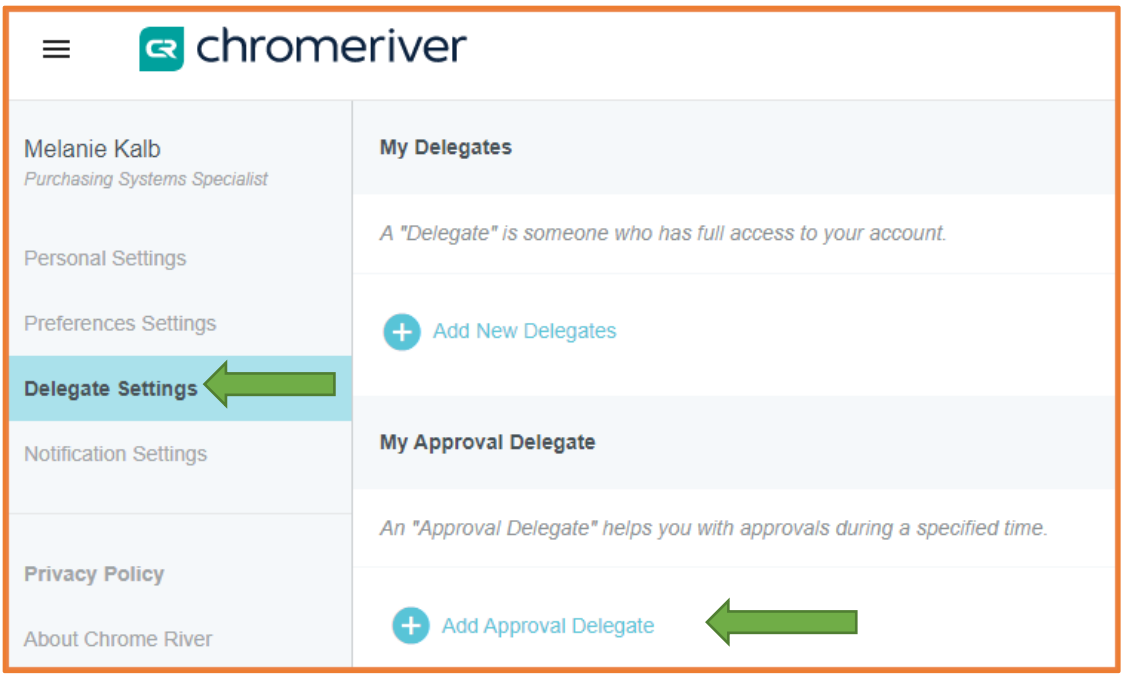
You may assign an alternate Approver if you are on Vacation or cannot Approve. The navigation bar remains at the top of the screen. This allows quick access to return to the home screen or dashboard.



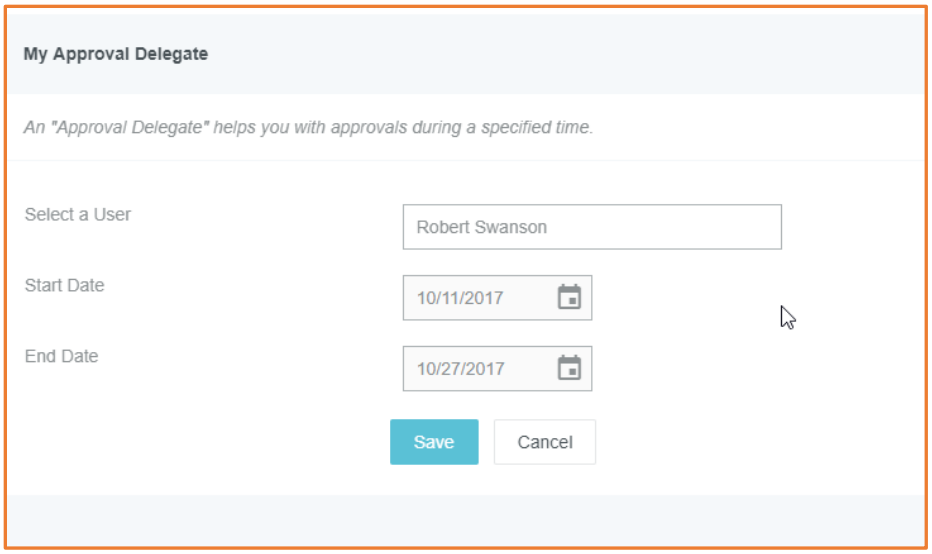
Click on your user profile. Select Account Settings.



Click on Delegate Settings. Click on Add Approval Delegate.



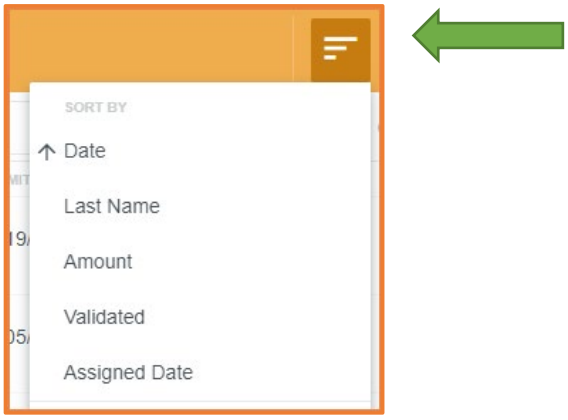
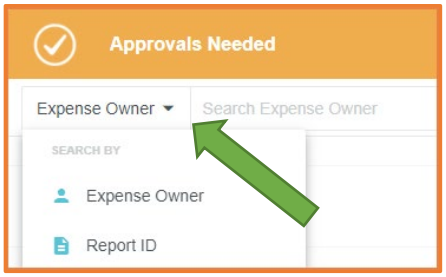
Begin typing the name of the individual in the Select a User text box. This will create a user search, select the username when it appears. Add a Date Range and Click Save. If the username does not appear, then the individual is not currently a user in the Chrome River system. Email tbachma@bgsu.edu for assistance.



Approval Sort Options

Click on the Sort Menu

Sort by Date, Last Name, Amount, Validated, or Assigned Date.



Or, sort by the Expense Owner or the Report ID.