

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.

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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 <u>Controller's Office</u> website. The Pcard Manual can be located on the <u>Purchasing</u> 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 <u>https://my.bgsu.edu</u>. Use your University username and password to log in. If you have difficulty accessing the site, email <u>tbachma@bgsu.edu</u> for assistance.

BGSU, sin	gle Sign On				
ACADEMICS ADMISSIONS ABOUT A	THLETICS ALUMNI LIBRARIES	RESEARCH STUDENTS INTERNATIONAL	GIVE 前	MY BGSU	EMAIL⊠
USERNAME		PASSWORD		LOGIN	×
	Nome Libraries Employees	PCard & Expense Reimbursement			
mit their pro request dea ID-19 websit	adline w	Chrome River			
	Falcon Outfitters				

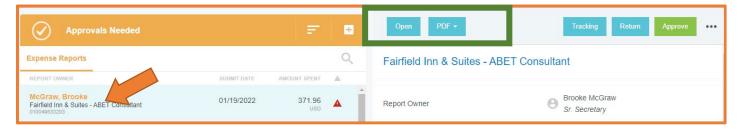
Approve in Chrome River

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.

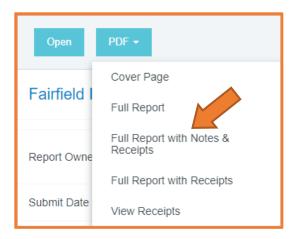
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6 Cre 145 Re	d Items edit Card Items eccipts L 174 UNUSED ITEMS
Approva	provals als Needed
0 Pre-	ense Reports -Approvals dit Card Request

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.

Routing Steps	
	4 <u>5</u> 6 >
Step Number	4
Assigned To	APPCardReview: Firmwide
Assigned Date	02/07/2022 02:56 PM
Assigned Date	02/07/2022 02:36 PM
Step Status	Assigned
Routing Rule	120000 - Route to APPCard Reviewer

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.

Return Comment	
Not so fast, buster!	
	 17

Approve

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

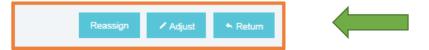
Approval Confirmation		
I hereby approve this report.		
	Cancel	Approve

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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 lineitem has been returned or reassigned, it will be noted by a red arrow.

	20.22								
Expense			326 6:44 AM			O	er (Diem	 Approve
DATE	5.87	DASES	SPENT	APPROVES	/ = /	. 6			
Mon contractas	8	Mileage	24.77 UED	24.77 USD	ŧ.	× i	Clate	02/15/2026	
Mon conscion	×	Per Diem	134.00 185	13M.00 UBD		~	Spent	134.00 USD	
Mon consideration	71	Airlane	00.00 100	400.00 LISD	-	٠	Approved	134.00 USD	
Tue co: +s:2028	d	Per Diem	154.00 180	1)4.00 USD			Description		
1066 0217/0028	2	Per Diem	134.00 050	154.00 1/90		× .	Location	Stockholm, Sweden	
Ð	i		Total Approved Amount 960.77 USD		Submit		¢ Previous	2015	Next 1

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

02/09/2022	66.16 USD	▲
02/09/2022	233.40 USD	▲
02/14/2022	1,041.88 USD	~
02/15/2022	657.27 USD	~

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.

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		Cancel Save
🖌 Per D	iem	✓ Approve
djust		
Nice try, pall		
Notify Expense O	wner	
	02/15/2026	
ate	02/15/2026	
ate		

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.

ATE EXPENSES SPENT APPROVED Ø ■ ▲ Ø Aon 2/15/2026 ③ Mileage 24,77 USD 0 ✓ ✓ Aon 2/15/2026 ④ Per Diem 134,00 USD 100,00 USD ■ ✓ Aon 2/15/2026 ❤ Per Diem 134,00 USD 100,00 USD ■ ✓		1 Allachments				(i	20
Alon USD USD USD V Alon 2/15/2026 Image Image	TE ED	PENSES	SPENT	APPROVED	0 🗖	A 0	
2115/2028 Per Diem USD USD USD VSD VSD VSD VSD VSD VSD VSD VSD VSD V) Mileage		24.77 USD	Ø	~	*
		Per Diem			E	~	
		Airfare			9	*	
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Ved 2/17/2026 😪 Per Diem 134.00 USD USD 🗸		Per Diem				~	
Thu 2/18/2026 C Per Diem 134.00 134.00 vsp vsp	u 18/2026 📧	Per Diem				~	

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.

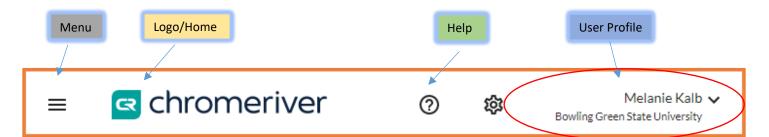
Email approvals may only be sent from your primary Chrome River account email address.

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.

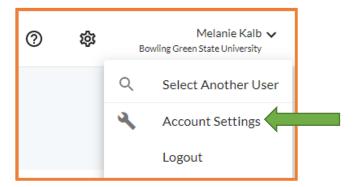
ACTION REQU			Chrome Rive
	ACCEPT	RETURN	
Expense Report for	Michael Scott		
Created By	Ryan Howard		
Report Name	Scranton White Pa	ges meeting	
Submit Date	11/11/2019		
Expense Dates	11/11/2019 - 11/	12/2019	
Total Expenses	90.00 USD		
Prior Approvers	David Wallace [11	/29/2019 GMT]	
Compliance War	ning		
Taxi	Over \$60 on a sing	ale taxi expense	
Response	Dwight had an em back all the way fr	ergency and left with the o om Allentown.	ar, so I had to take a taxi
Account Sun	nmary		Amount (USD)
DMST.1114.03	Sales Travel	Scranton	90.00
Expense Det	Taxi/Car Service	Scranton	90.00 USD
	DMST.1114.03	Sales Travel	
Business Purpose		Meeting w	ith Scranton White Pages
Location			Allentown, PA, USA
# Attendees			1.00
Cost Code			1001
Reason Assigned	E	pense Owner Review (w	hen delegate submitted)
Receipts			View
Financial Su	mmary		Amount (USD)
Total			90.00
Less Company Paid			0.00
Payable to Employe	e		90.00
			50.00
rayable to Employe			
rayable to chiploye			

Approval Delegate

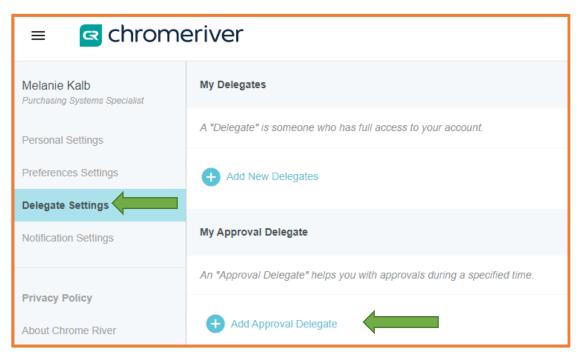
You may assign an alternate Approver if you are on Vacation or cannot Approve. The navigation bar remains at the top of the screen. This allows quick access to return to the home screen or dashboard.



Click on your user profile. Select Account Settings.



Click on Delegate Settings. Click on Add Approval Delegate.



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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.

My Approval Delegate		
An "Approval Delegate" helps you with approva	als during a specified time.	
Select a User	Robert Swanson	
Start Date	10/11/2017	G
End Date	10/27/2017	
	Save Cancel	

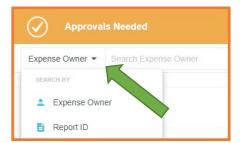
Approval Sort Options

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.



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