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Logging In

Click on MyBGSU-Enter Login Information-Employees-Purchasing-Chrome River Icon

LOGOUT SUCCESSFUL

Dashboard Basics
Accessing Help Menu/Tutorials
Delegate Your Dashboard to Another User

Click on Profile Menu - Settings - Delegate Settings

Add New Delegates
Switching to Another Dashboard
Click on Profile Menu and Select the User

Reset the Dashboard Screen
Simply Click on the Chrome River Logo

Main Menu Button
a. Dashboard
b. Pcard Transactions
c. Receipts Gallery
d. Draft, Returned and Recently Submitted Reports
e. Inquiry for Older Reports
Receipts Gallery

Accessing Receipts Gallery

Receipt Gallery

The Receipt Gallery is accessible from the main menu (via the eRECEIPTS button), the Add Expenses panel, and via the ADD ATTACHMENTS button on the Expense Entry Screen. It contains all the receipt images uploaded directly to the gallery via the Chrome River app. The maximum file size for individual images is 10 MB, and JPG, PDF, PNG, and TIFF files are accepted.

Accessing the Receipt Gallery

To access the Receipt Gallery from anywhere in the app, the Menu button and selecting eRECEIPTS from the drop-down menu.
To Access the Receipt Gallery from the Add Expense panel, tap the + BUTTON from inside any expense report, then tap RECEIPT GALLERY at the bottom of the list.

To Access the Receipt Gallery from inside an expense item, tap ADD ATTACHMENTS in the Attachments section, then tap FROM RECEIPT GALLERY.

A green dot next to the Receipt Gallery indicates that there are unused receipts available.

Upload Image
To add images to the Receipt Gallery from within the app, tap the UPLOAD button found in the upper right-hand corner of the Receipt Gallery. Select the desired image(s) and tap OPEN.

Again, the maximum file size for individual images is 10MB, and JPG, PDF, PNG, and TIFF files are accepted.
Use the icons in the upper left of the gallery to choose one of two views. By default, you will be shown Image View.

**IMAGE VIEW**

Shows thumbnail images of each receipt.

**LIST VIEW**

Shows all images in a list. The check boxes on the right allow you to add multiple receipts to an expense report simultaneously or delete multiple images simultaneously. You may also select the expense type associated with an image by tapping on its icon.

- **Receipt**: Receipt image submitted via email.
- **Unattached Image**: These are images that were
  - directly uploaded to the Receipt Gallery,
  - attached via scanning or faxing a cover page that was subsequently detached from that report,
  - or uploaded to a line item or header from somewhere other than the Receipt Gallery—like a phone’s camera roll—and subsequently detached from the line item or header.
Quick Upload for Mobile Devices

Users of narrow-screen devices like mobile phones may quickly upload images to the Receipt Gallery via the Quick Upload button on the Dashboard.

Once the image has uploaded, the notification message may be dismissed, allowing you to stay on the Dashboard, or you may tap the **VIEW RECEIPT GALLERY** link to be taken to the Receipt Gallery.
Emailing Receipt Images to Your own Dashboard

1. Take a photo of the receipt with your mobile device.
2. Draft a new email message containing the following information.

   To: receipt@chromefile.com
   From: your.name@your.company.com
   Subject: xx.nn [dollar amount]
   Body: Description of expense

3. The “From” email address must be one associated with your account in Chrome River EXPENSE online.
4. The Subject should be the amount of the expense with no symbols—the corresponding currency code is optional. If you neglect to put the expense amount in the Subject line, the amount will be 0.00 when the expense appears in Chrome River online.
5. The body may contain the description of the expense. It will appear in the Description section of any PDF reports generated.

   ![Email draft example]

6. Attach the receipt photo. Only JPG, PDF, PNG and TIFF files of less than 10 MB each or 100 MB total can be accepted.
7. Send the message to receipt@chromefile.com.
8. Once it is received, you will be able to view the expense in the Receipt Gallery and the Offline tab of the eWallet.

Emailing a Receipt Directly to a Report

You can also add the images directly to a report that you have in draft mode

- If you know the ID of the expense report to which you’d like to attach an image, enter the Report ID (including dashes) into the subject line of an email you’ve composed (instead of the currency). Remove everything from the body of the email, including any email signatures. Send the email to receipt@chromefile.com.
- This method works even if you have multiple images attached to the email you’re sending, as long as they all apply to the same expense report. The total combined size of all images may not exceed 100 MB.
Emailing to Someone Else’s Dashboard

Emailing Receipts to Another User’s eWallet

Chrome River makes it possible for you to email receipt images directly to another user’s eWallet and to have other users email receipts directly to your eWallet.

Simply enter another Chrome River user’s email address as the Subject of the email when following one of the methods listed above. The sender will receive an email confirmation that details who the image was sent to. The recipient will see the receipt in their eWallet the next time they log into Chrome River.

- The receipt must be sent from a user’s primary or alternate email address stored in Chrome River.
- The subject line must contain an address that is the other user’s primary or alternate email address in Chrome River.
- Both users must belong to the same Chrome River customer.

Creating Expense Reports

Reimbursement Expense Report

- Make Sure all Pertinent Receipts are Saved to Your Receipt Gallery
- You can add Receipts from your Computer on Each Report but Using the Receipt Gallery is Recommended

Click on + New to Start the Reimbursement Report
## Expenses For Darin Teeple

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Name</td>
<td>Reimbursement Report for Chicago Conference</td>
</tr>
<tr>
<td>Pay Me In</td>
<td>USD - US Dollars</td>
</tr>
<tr>
<td>Non-Employee Expense Report</td>
<td></td>
</tr>
</tbody>
</table>
Choose the Expense Category for Your Reimbursement Item

*IMPORTANT REMINDER – WHEN DOING A REIMBURSEMENT REPORT YOU WILL ALWAYS START BY CHOOSING A CATEGORY AND MANUALLY ADDING THE PRICE. WHEN DOING A PCARD REPORT YOU WILL GO INTO THE CREDIT CARD SECTION AND PULL THE EXPENSES DIRECTLY FROM THAT SECTION*
Add Date of Expense, Amount Spent, Business Purpose of the Purchase, Account Code, Merchant Name, Check Receipt Attached Box and add Allocation and Program Code and Click Save

Note *the System Lets you Know That This is a Reimbursement Report
At This Point You Can Add Additional Charges or Simply Add Your Receipts and Submit the Report

Adding Receipts – Click Add Attachments – You can add From Your Computer or From Receipt Gallery
Choose the Attachment and Click Attach

You Could Now Submit the Report by Clicking Submit and then Submit Again
Pcard Expense Report

- Make sure all pertinent receipts are saved to your Receipt Gallery
- You can add receipts from your computer on each report but using the receipt gallery is recommended

Click + New to Start the Pcard Expense Report

Name Your Report and Click Save
Click on Credit Card and Select the Pcard Items You Would Like to Add to the Report Then Click Add

If an Expense Item Does Not Have an Expense Category Selected You Will Need to Select One
Fill in the Description and Account Code if Necessary, Click Receipt Attached, Add Allocation and Program Code and Click Save.

Note *the System Lets you Know That This is a Pcard Report*

If a red Triangle Appears Next to an Expense Item Line it Must be Addressed With a Comment – add Comment and Click Save.
Finally you will Need to add the Receipt Images – Click add Attachments and Select From Your Receipt Gallery or From a PDF Document on Your Computer
Click Submit then Submit Again

Note *the Total pay me Amount is $0.00 Which Means This Is a Pcard Report

Single Pay Expense Report
Name Your Report – It is Best Practice to Name as “Single Pay Along With the Individual’s Name.” This way the Approver Knows This Person is Being Paid Not the Submitter.

- Click on Non-Employee Button
- Fill in the Information About who is Getting Paid
- Click Save
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Name</td>
<td>Single Pay Example</td>
</tr>
<tr>
<td>Pay Me In</td>
<td>USD - US Dollars</td>
</tr>
<tr>
<td>Non-Employee Expense Report</td>
<td>Yes</td>
</tr>
<tr>
<td>Name</td>
<td>John Doe</td>
</tr>
<tr>
<td>Address1</td>
<td>4433 Iron Drive</td>
</tr>
<tr>
<td>Address2</td>
<td>Optional</td>
</tr>
<tr>
<td>City</td>
<td>Nowhere</td>
</tr>
<tr>
<td>State</td>
<td>Virginia</td>
</tr>
<tr>
<td>ZIP</td>
<td>44555</td>
</tr>
</tbody>
</table>
Click on Create New Reimbursement to Bring up Expense Categories

Choose the Appropriate Reimbursement Category and do the Same as a Reimbursement Report

*Notice* You Will See a Pay Me Amount. As Long as You Have the Non-Employee Information Filled in You Will Not Be Reimbursed Yourself.
Recall Button
Chrome River Mercury now Offers a Recall Button to put Reports Back Into Draft Mode After They Have Been Submitted

The Reports Can Be Recalled at Anytime Prior to Final Approval

- Recall Example
  - Navigate to Submitted Expenses and Locate the Report to Recall and Click on it

The Report will now be Back in Draft Mode
Approving Expense Reports

Chrome River Mercury – Approving Pcard Expense Reports

- Log into Chrome River
- Sign in through MyBGSU
- Click Employees then Purchasing
- Click on the Chrome River icon

Click on the Expense Report Approvals needed
Click on the Report You Would Like to View

Click the Open button
Click on the PDF button to review the receipts – they will open in another window

After reviewing the report you will have the option to Return or Submit the report (approve)

If you have an Admin role you can switch to the Platinum interface for Admin and reporting options – it will open a separate window
Approval Delegate

Set an Approver in Your Place if you are on Vacation or Can’t Approve

Click on the Profile Menu Then Settings

Click on Delegate Settings then Add Approval Delegate
Select an Approver and a Date Range and Click Save

My Approval Delegate

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

Select a User: Robert Swanson
Start Date: 10/11/2017
End Date: 10/27/2017

Approval Sort Options

Click on the Sort Menu
You can then sort by Date, Last Name, Pay Me Amount, and Validated.

You can also sort by the Expense Owner or the Report ID.
Mobile Functionality

Open your mobile device’s browser and go to the BGSU Website.

*There is currently no App so Going Through the Browser is the Only Option*
Click on myBGSU and log in Then Click on Employees Then Purchasing
Click on the Chrome River Credit Card Emblem

Chrome River Dashboard
Uploading Receipt Images to Your Receipt Gallery

- Click on the Camera Symbol
- Choose Take Photo or Video
- Take a Picture of the Receipt – it is Now in Your Receipts Gallery
The Image will be Located in the eReceipts Section
FAQ’s

Q 1. How do I add additional expenses to a report?

Answer. If you do not see pcard expenses or reimbursement expense categories, simply click the plus button in the upper portion of the screen.

Q 2. If there is no delete button how do I delete an expense line?

Answer. If you do not see a delete button after clicking on the expense line, simply click on the 3 dot menu on the far right of the screen.

Q 3. Do I need to change allocation on each hotel line?

Answer. Yes you do need to change the allocation per line.
Q 4. Why do I not see buttons that I see in the manual?

Answer. If for some reason you do not see a button on your screen, check your display setting on your computer and make sure they are set at the recommended settings.

![Image of display settings](image)

Q 5. What are the dates under the receipt images?

Answer. If the system recognizes the date on the receipt, it will put that date under the image. If the date is not there or illegible then it defaults the date to the current date.

![Image of receipt dates](image)
Q 6. Why can’t I find a specific address when calculating mileage?

Answer. Many times the mileage wizard does not recognize a specific address but will recognize a specific building. If nothing appears you can choose the closet point that does.

1851 N Research Drive does not show up

However, the Huntington Building does

Q 7. Can I delete a range of attachments?

Answer. Currently, if you have multiple attachments on your report, you will need to delete each individually or delete the line or entire report and start over.
Q 8.  Will the approvers be notified when I recall a report?

Answer.  Currently, the system will not notify the approver when a report after it has gone through part of the approval process. The submitter may want to inform the submitter that the report was recalled.

Q 9.  What if I have special handling instructions for a payment?

Answer.  If you need a payment to be processed in a way that differs from standard procedures, you will need to do two things. First, include a note in the comments of the report. Second, send an email to BGSUAP@bgsu.edu explaining the situation. This email must include the report ID (01000...). Special handling of payments should only be used as a last resort when no other options is available.