

# Chrome River Training

Pre-Approval

Expense Reimbursement

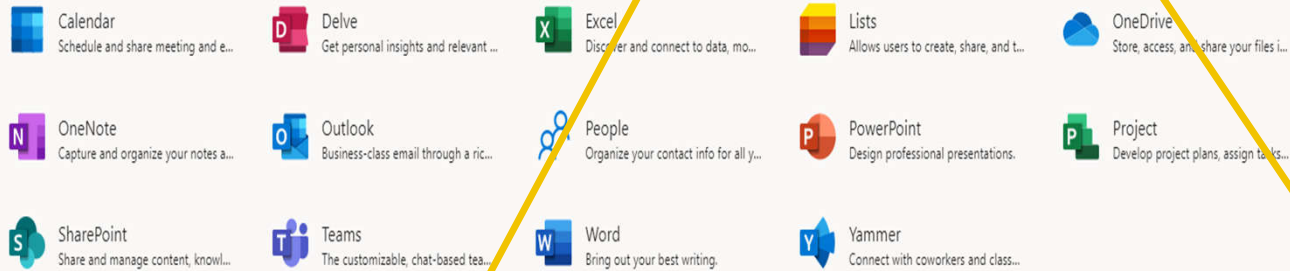
SNAP App

Per Diem

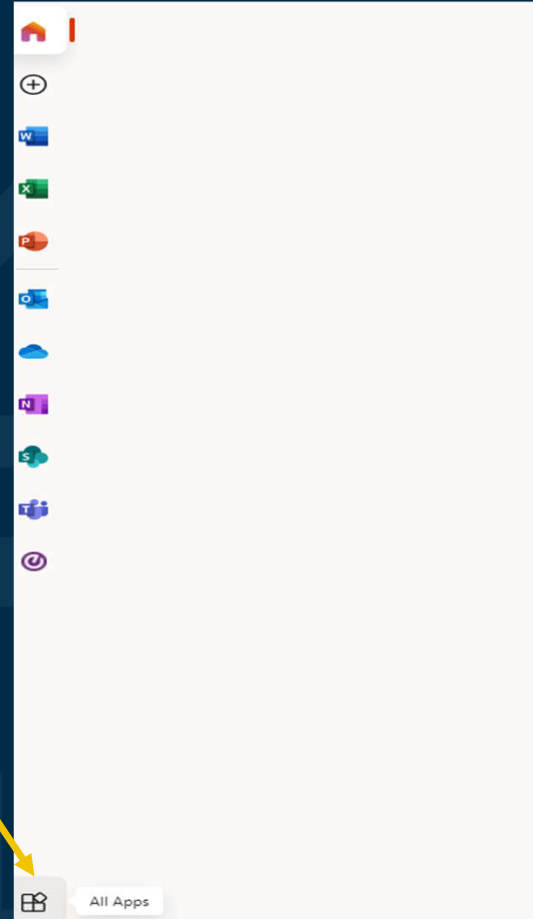
[ruexpense.regis.edu](http://ruexpense.regis.edu)

# Creating a Bookmark for Chrome River

Browse to your Microsoft office 365 home screen and select 'All Apps', then drag and drop the Chrome River Icon onto your Bookmark toolbar.



## All apps



# Chrome River Quick Guide

## Pre-Approvals



[ruexpense.regis.edu](http://ruexpense.regis.edu)

Click the **+New** button on the Navigation Bar and select **'New Pre-Approval Report'** from the dropdown menu



1. Assign a name for the report. Please be as descriptive as possible. For example: “Capra Chicago Trip 8.18-8.23”

2. Assign the dates for the expense

3. Enter a Business Purpose. This will be your description of your expense, the more detail the better.

4. Leave Fiscal Year

5. Once completed, select Save

Cancel Save

### Pre-Approvals For Nicolene Capra

Report Name: Travel Pre-Approval

Start Date: 08/18/2021

End Date: 08/23/2021

Number of Days: 6

Pay Me In: USD - US Dollars

Business Purpose: Conference

Fiscal Year: FY22

Are you charging a budget code outside of your Dept?

Please search by typing the name or number of the FUND, DEPT or ACTV

#### Allocations

10-000-700300-0000 10-General Operating Budget 700300-Controller's Office / 0000-General Activity

Select an expense to add to the pre-approval report from the expense tile mosaic to the right.

### Add Pre-Approval Types



AIRFARE



CAR RENTAL



HOTEL



DONATIONS



SOFTWARE AS A SERVICE



COMPUTER EQUIPMENT

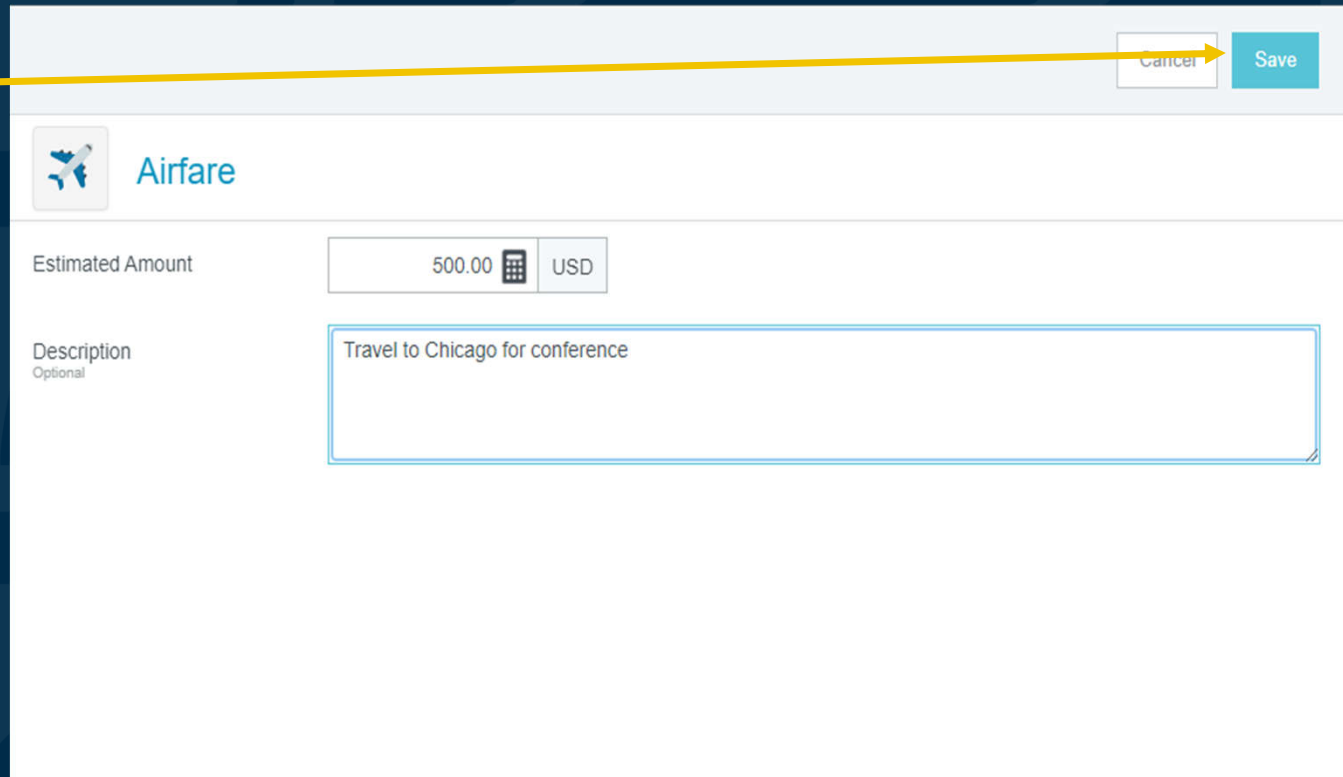


COMPUTER SOFTWARE



GIFT CARDS

Complete the expense tile form and click **Save** in the upper right corner to continue.



The screenshot shows an expense form titled "Airfare". At the top right, there are two buttons: "Cancel" and "Save". A yellow arrow points from the text on the left to the "Save" button. The form contains the following fields:

- Estimated Amount:** A text input field containing "500.00" with a calculator icon and a dropdown menu set to "USD".
- Description:** A text input field containing "Travel to Chicago for conference". The label "Optional" is positioned below the field.

The expense will be added to your pre-approval report and visible on the report summary to the left. The expense tile mosaics will appear again on the right.

Pre-Approvals For Nicolene Capra

### Travel Pre-Approval

0 Comments 0 Attachments

EXPENSE	ESTIMATED
Airfare	500.00 USD

PA Report ID: 010000532866

Total Estimated Amount: 500.00 USD

Submit









### Add Pre-Approval Types

- AIRFARE
- CAR RENTAL
- HOTEL
- DONATIONS
- SOFTWARE AS A SERVICE
- COMPUTER EQUIPMENT
- COMPUTER SOFTWARE
- GIFT CARDS



Continue adding expenses to your report by selecting the appropriate expense tile, completing the expense form, and clicking **Save** in the upper right corner to add to the report.

### Add Pre-Approval Types

 AIRFARE	 CAR RENTAL	 HOTEL	 DONATIONS	 SOFTWARE AS A SERVICE	 COMPUTER EQUIPMENT
 COMPUTER SOFTWARE	 GIFT CARDS				

Once you have finished adding all expenses to your pre-approval report, click the green **Submit** button at the bottom of the report summary.

Pre-Approvals For Nicolene Capra

### Travel Pre-Approval

0 Comments 0 Attachments

EXPENSE	ESTIMATED
Airfare	500.00 USD

PA Report ID: 010000532866

Total Estimated Amount: 500.00 USD

[Submit](#)

A submit confirmation will appear at the top right of the screen. Click **Cancel** to return to the report and make any changes. Click **Submit** to submit the preapproval report to the approval workflow.

You will receive an email once your pre-approval is approved.

### Submit Preapproval

I affirm that the expense estimates listed in this pre-approval are accurate and complete to the best of my knowledge. I understand that I must submit an expense report with actual spending and appropriate documentation within 60 days of the end of my trip or event in order to be reimbursed for any out-of-pocket expenses.

# QUESTIONS?

Pre-Approval Training

[invoice@regis.edu](mailto:invoice@regis.edu)

# Chrome River Quick Guide

## Submitting an Employee Reimbursement



[ruexpense.regis.edu](https://ruexpense.regis.edu)

Click the **+New** button on the Navigation Bar and select **'New Expense Report'** from the dropdown menu.



1. Assign a name for the report.  
Please be as detailed as possible.

2. Assign the date of the purchase

3. Enter a detailed Business  
Purpose

4. Select the appropriate report  
type: Athletic Recruiting, Business  
Expense or Travel, Pcard Expense  
Reconciliation, or Student  
Expense.

5. Leave Fiscal Year

6. Once completed, select Save

Expenses For Nicolene Capra

Cancel Save

Report Name Business Meal

Pay Method USD - US Dollars

Start Date 08/02/2021

End Date 08/02/2021

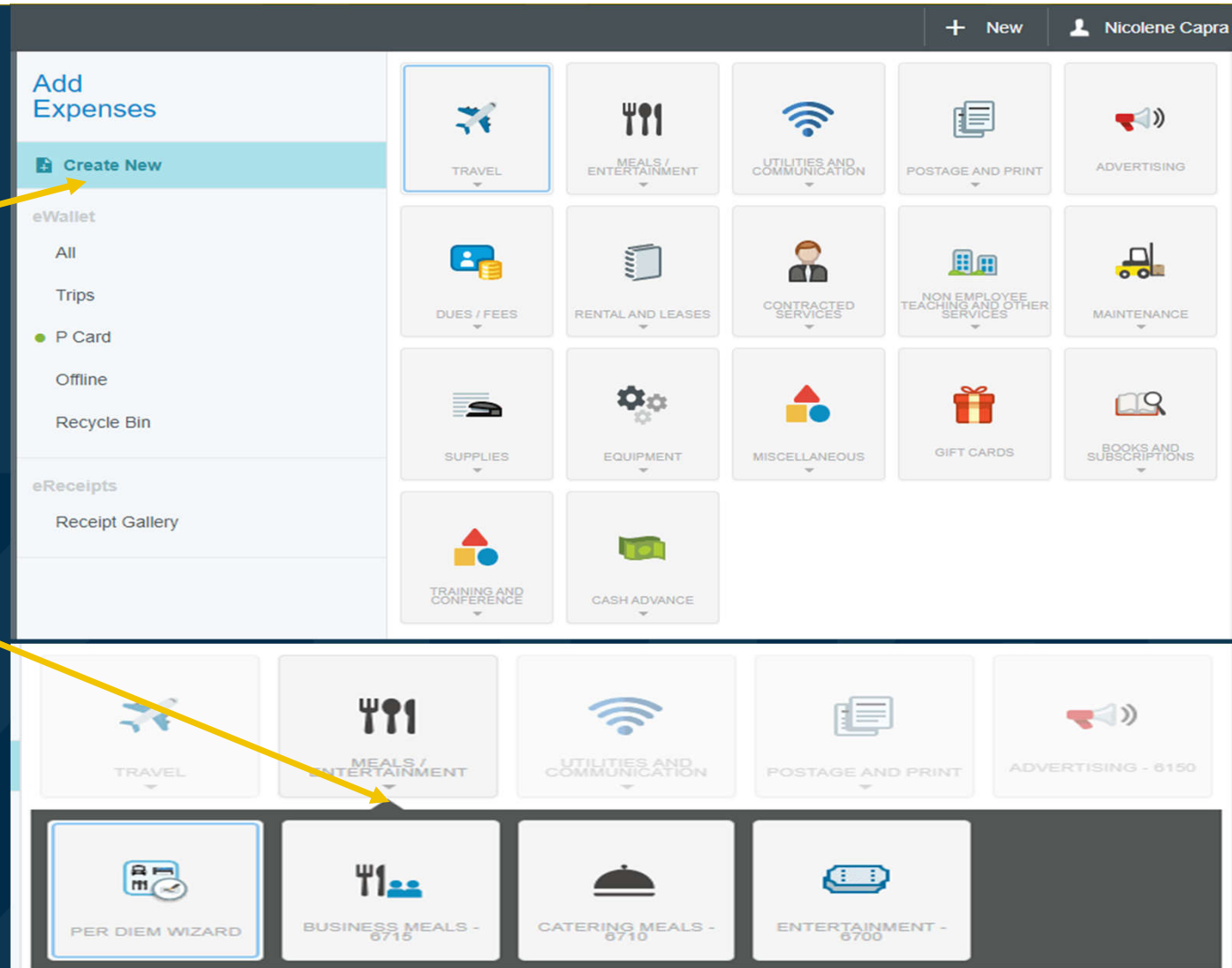
Business Purpose New Student Orientation

Report Type Business Expense or Travel

Fiscal Year FY22

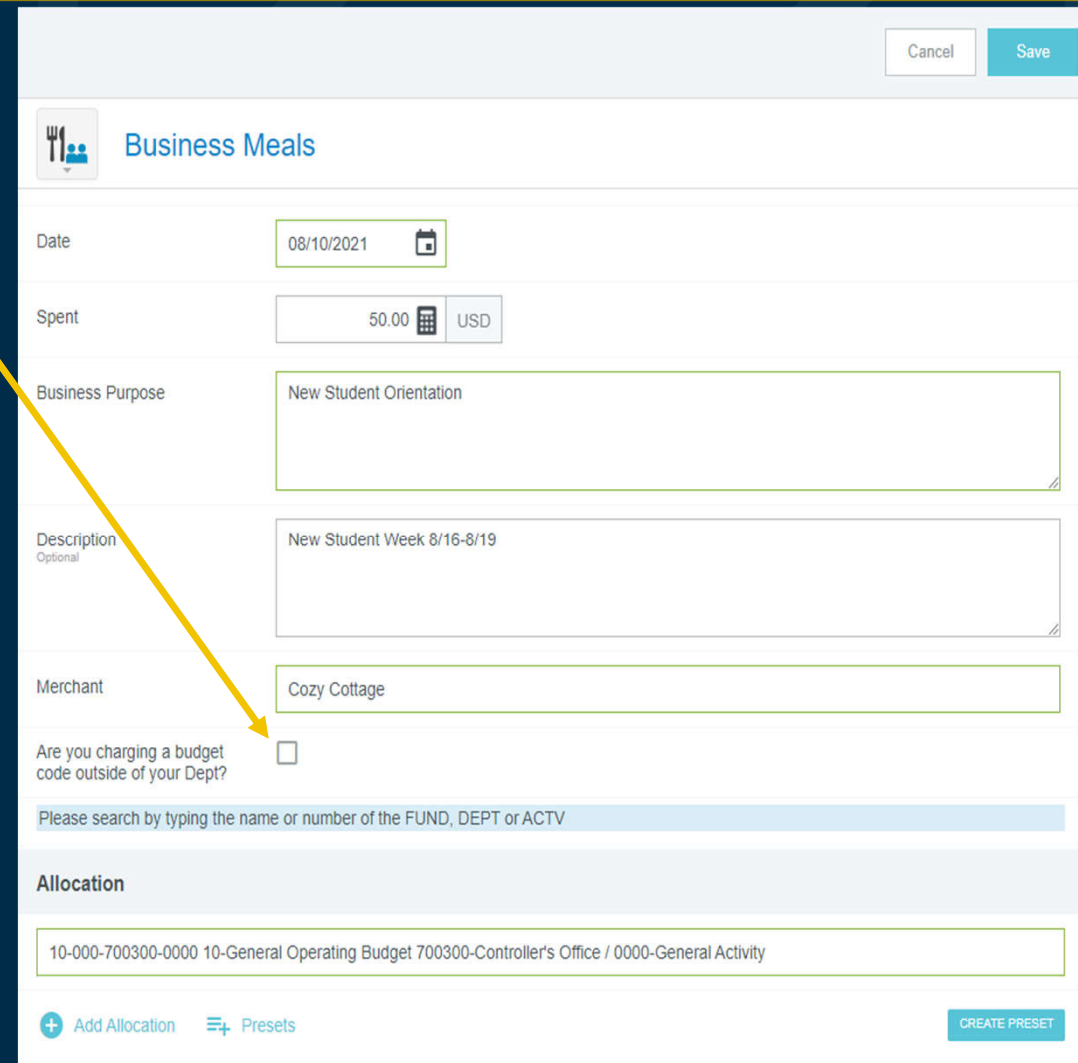
The **Add Expenses** window will now display on the right side of the screen. Click on **Create New** in the **Add Expenses** window to see all of the expense options.

Tiles with downward facing arrows at the bottom are “parent” tiles that have additional expense tiles organized underneath them.





Fill out the form with all of the correct information regarding the reimbursement. If the allocation needs to be changed, highlight the entire field and hit delete, then you may add in the allocation you would like. If you are charging outside of your department, please select the checkbox indicating that.

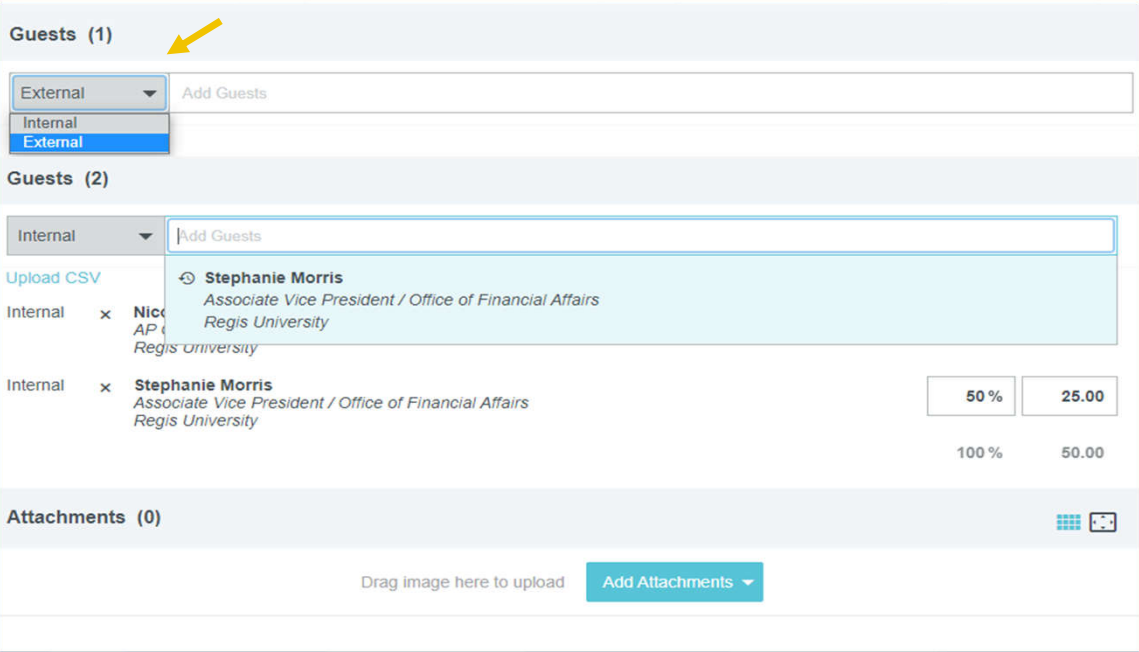
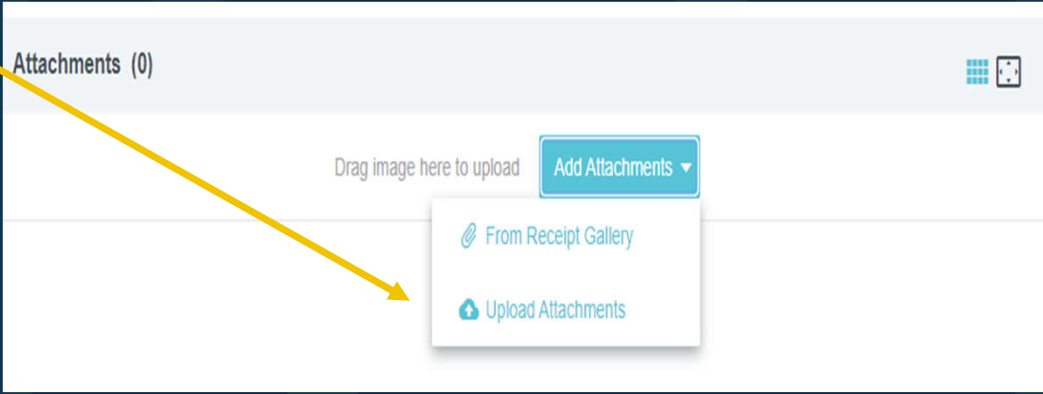


The screenshot shows a web form titled "Business Meals" with the following fields and options:

- Date:** 08/10/2021
- Spent:** 50.00 USD
- Business Purpose:** New Student Orientation
- Description (Optional):** New Student Week 8/16-8/19
- Merchant:** Cozy Cottage
- Are you charging a budget code outside of your Dept?:**
- Allocation:** 10-000-700300-0000 10-General Operating Budget 700300-Controller's Office / 0000-General Activity


Buttons at the top right include "Cancel" and "Save". Buttons at the bottom include "+ Add Allocation", "Presets", and "CREATE PRESET". A yellow arrow points from the instructional text to the checkbox.

Attach the receipt at the bottom by selecting 'Upload Attachments' or 'From Receipt Gallery'. For business meals it is required by the IRS that all guests be listed. You may attach a calendar appointment or roster or list guests using the function in Chrome River. If an internal guest doesn't populate, use the external guest function. For external guests please click on the dropdown and select external, then 'Add New External Guest'. When the form is completed click on **Save** at the top right of the screen.



If a warning should come up, include an explanation and select **post**.

Images Edit Delete ...

 Business Meals - 6715

**⚠ Guest Compliance** #217

You have included your boss as a guest. Per policy, the most senior guest should pay for the expense. Please provide an explanation.

..|

Cancel Post

To add more expenses to the report, click on the + sign at the top, near the middle of the screen.

Continue to add all expenses this way.

When you have completed adding all expenses, click on **Submit**.

Expenses For Nicolene Capra

Business Meal

0 Comments 1 Attachments

DATE	EXPENSE	SPENT	PAY ME
Tue 08/10/2021	Business Meals Cozy Cottage	50.00 USD	50.00 ✓

Expense Report 010023549482

Total Pay Me Amount 50.00 USD

Submit

Add Expenses

Create New

eWallet

- All
- Trips
- P Card
- Offline
- Recycle Bin

eReceipts

Receipt Gallery

TRAVEL

MEALS / ENTERTAINMENT

UTILITIES AND COMMUNICATION

POSTAGE AND PRINT

ADVERTISING

DUES / FEES

RENTAL AND LEASES

CONTRACTED SERVICES

NON EMPLOYEE TEACHING AND OTHER SERVICES

MAINTENANCE

SUPPLIES

EQUIPMENT

MISCELLANEOUS

GIFT CARDS

BOOKS AND SUBSCRIPTIONS

TRAINING AND CONFERENCE

CASH ADVANCE

If you have a previously submitted pre-approval for travel, software, gift cards, or donations, you should select '**Pre-Approval**' and select the correct pre-approval to attach to your reimbursement.

If you have a pre-approval to attach, your screen will look like this. Here you will select from your approved pre-approval reports.

You may then select '**Submit**' to submit your report.

**Submit Confirmation**

I affirm that this report is complete and accurate, and that all expenses being paid or reimbursed by the University are valid and comply with University policy. I affirm that any expenses claimed for reimbursement were paid with personal funds and have not been previously reimbursed through a submitted expense report or by an outside agency or third party. I affirm that no alcohol purchases being paid or reimbursed have been charged to a federal grant, and that any airfare payments or reimbursements charged to a federal grant comply with the Fly America Act or, when applicable, the Open Skies Agreement.

Cancel Pre-Approval Submit

**Apply Pre-Approval**

Select a pre-approval report

REPORT NAME	ORIGINAL AMT	REMAINING
Testing 3.9.21	635.00USD	635.00USD

If the report should bounce back with an error like the following, please email [invoice@regis.edu](mailto:invoice@regis.edu) and we will activate that GL account so that you may submit your report.

For any other questions or concerns, please email [invoice@regis.edu](mailto:invoice@regis.edu) or call Nicolene Capra at 303-964-6193 or Debbie Buchanan-Hudspeth at 303-458-4293.

### Report Notes

08/04/2021	Auto Bot	Returned due to LineItem 1: accounting string 10-000-510300-0000- is invalid. 400
	(Validate	
	Colleague	{error:[{code:Global.Internal.Error,description:Unspecified
	Accounting	Error on the system which prevented execution.,message:The
	String)	General Ledger number is of incorrect. It needs to have 19
		numbers. ]}}
		LineItem 3: accounting string 42-000-510300-9903- is invalid.

# QUESTIONS?

## Employee Expense Reimbursement Training

[invoice@regis.edu](mailto:invoice@regis.edu)

# Chrome River Quick Guide

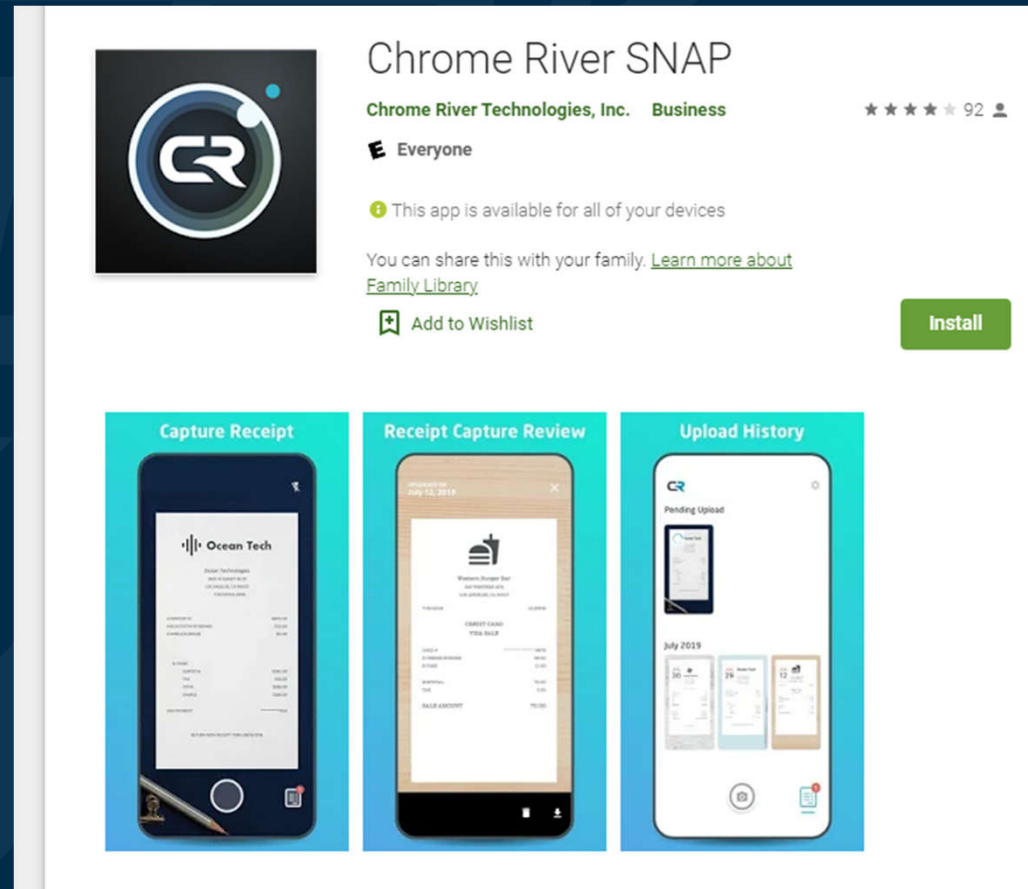
## Mobile SNAP App



[ruexpense.regis.edu](http://ruexpense.regis.edu)



Search for and download the Chrome River SNAP App from Apple or Google Play store





**Chrome River SNAP**  
Chrome River Technologies, Inc. Business ★★★★☆ 92  
Everyone


ℹ️ This app is available for all of your devices

You can share this with your family. [Learn more about Family Library](#)

🔖 Add to Wishlist Install

**Capture Receipt**  


**Receipt Capture Review**  


**Upload History**  


Once the App is opened, it will ask you to begin to setup your account. Enter the primary email address that is associated with your Chrome River account.


Before we begin, we need to verify the primary email used for your Chrome River account.

ncapra001@regis.edu

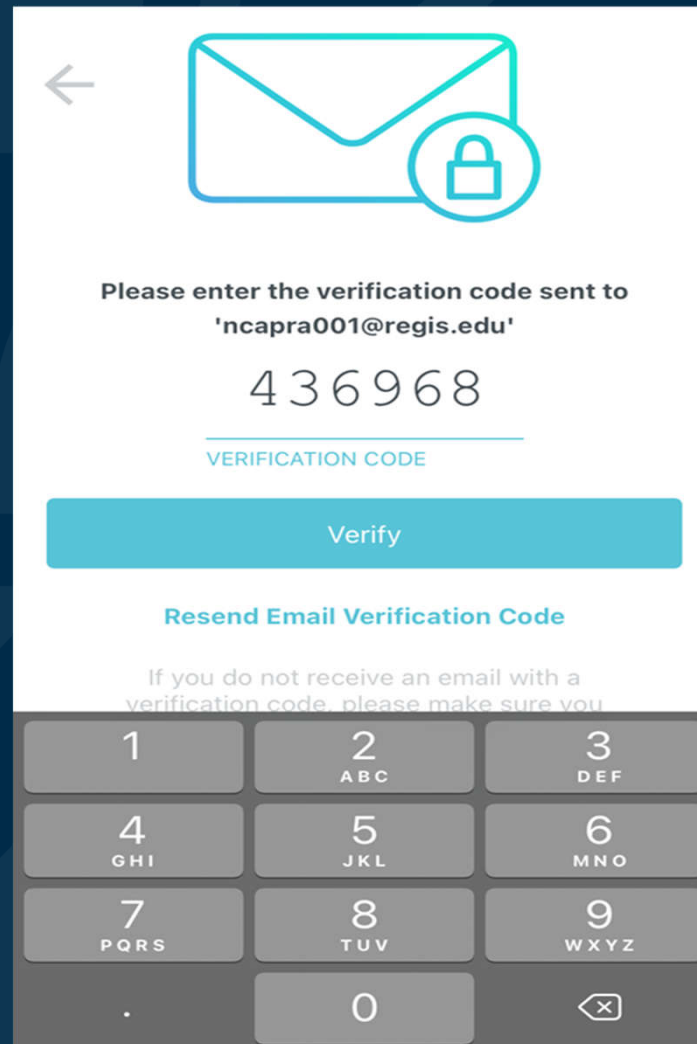
EMAIL ADDRESS

Next

By using our app, you agree to our [Terms & Conditions](#)

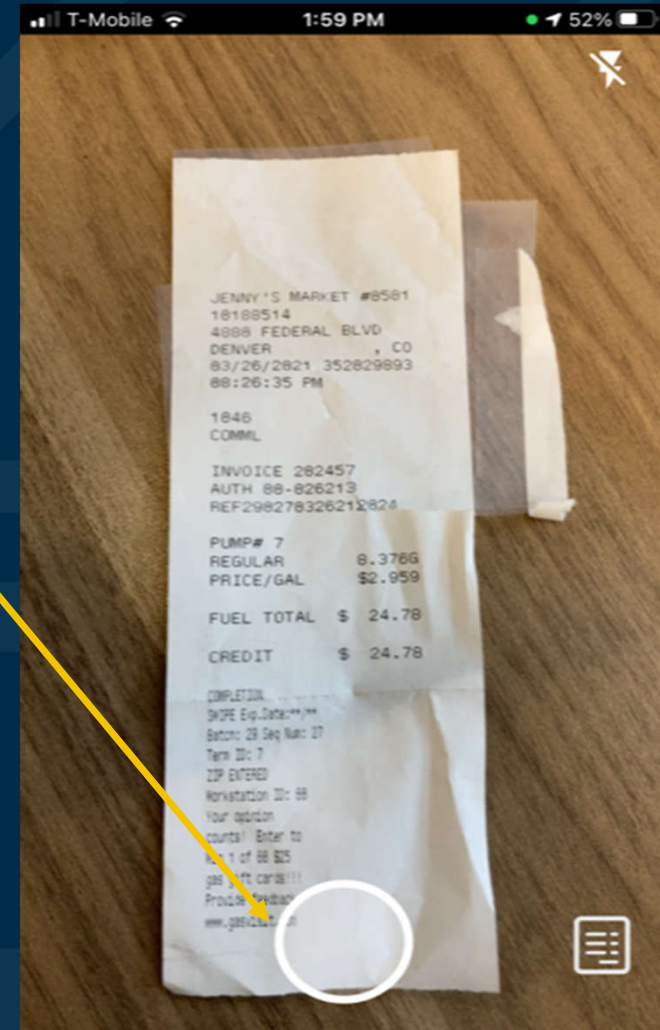


The system will send a verification code to your primary email address. Enter the verification code into the app to complete the setup.



A mobile app verification screen with a white background. At the top left is a grey back arrow. To its right is a teal icon of an envelope with a padlock. Below the icon, the text reads: "Please enter the verification code sent to 'ncapra001@regis.edu'". The code "436968" is displayed in a large font, with a teal underline below it. Under the underline, the text "VERIFICATION CODE" is written in teal. Below this is a teal button with the word "Verify" in white. Underneath the button is the text "Resend Email Verification Code" in teal. Below that is a greyed-out instruction: "If you do not receive an email with a verification code, please make sure you". At the bottom is a grey numeric keypad with buttons for digits 1-9, 0, a period, and a backspace icon.

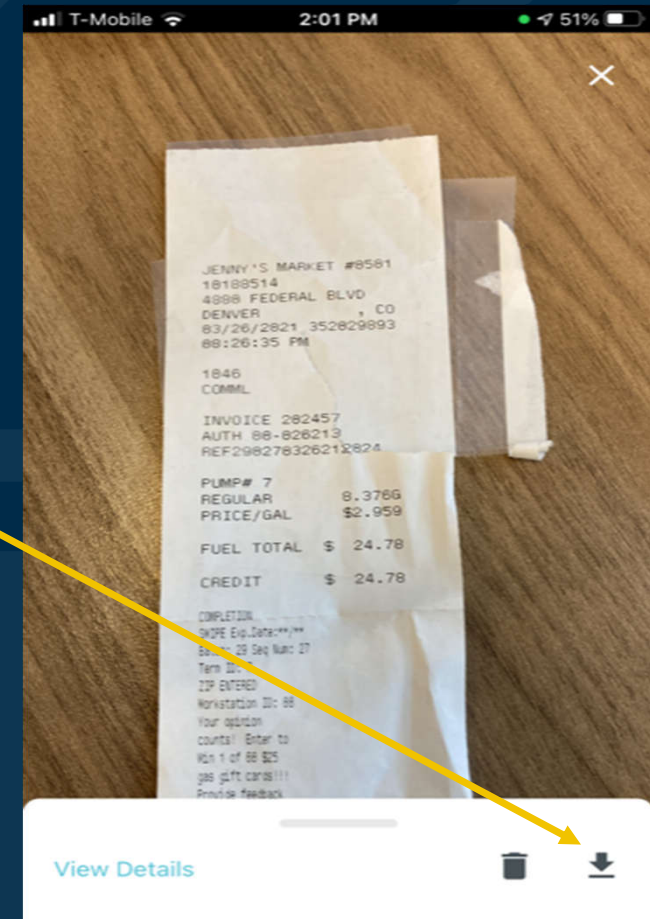
You may begin to use the app to take pictures of your receipts. You can take the photo directly in the app by selecting the app, lining up your receipt, and pressing the circle at the bottom of the screen to snap the photo. You have the option of using the flash in the upper right hand corner.



Once the photo is taken, you can choose to upload it to your Chrome River receipt gallery or you may retake the photo. Once the photo is uploaded you will no longer have this image on your phone. Please check that the image loaded clearly into your Chrome River account.



You can also upload a photo that is already saved in your phone's photo gallery by selecting the "share" option on your phone. Choose the photo you wish to upload, select share, and select the "SNAP" app. You can then click "Upload" to send to your Chrome River Receipt Gallery.



# SNAP APP Tips

1. Remember that if you are taking a photo with the app, a copy of the receipt will not be saved on your phone automatically. It is recommended that you keep the receipt to be sure that it uploaded clearly and correctly.
2. You will not receive verification that the image has uploaded to your Chrome River receipt gallery as you receive with an emailed receipt. Make sure to check your Chrome River account to see that the image uploaded clearly.
3. Files must be less than 10mb.
4. The application will cancel an upload that takes longer than 60 seconds.
5. The application supports JPG, PNG, and HEIC/HEIF formats.

# QUESTIONS?

SNAP App

[invoice@regis.edu](mailto:invoice@regis.edu)



# Chrome River Quick Guide

## Per Diem Expenses



[ruexpense.regis.edu](http://ruexpense.regis.edu)

Click the **+New** button on the Navigation Bar and select **'New Expense Report'** from the dropdown menu.



1. Assign a name for the report. Be as descriptive as possible

2. Assign the date of the purchase

3. Enter a descriptive Business Purpose

4. Select the appropriate report type

5. Leave Fiscal Year

6. Once completed, select Save

Cancel Save

### Expenses For Nicolene Capra

Import from Pre-Approval Optional

Report Name

Pay Me In

Start Date

End Date

Business Purpose

Report Type

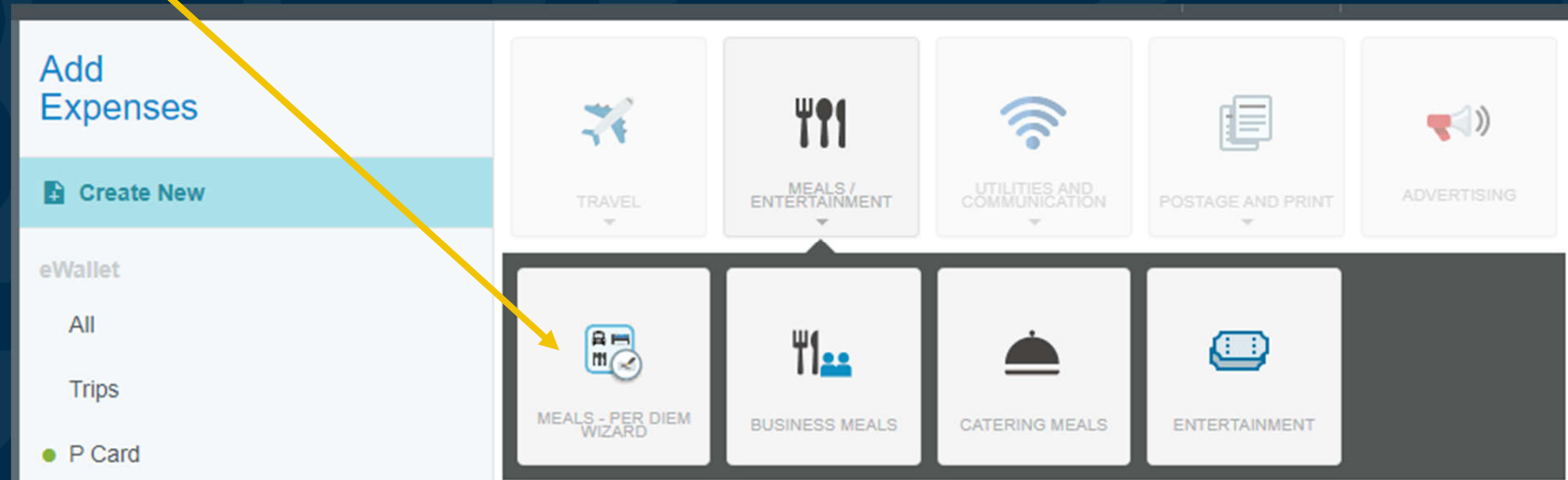
Fiscal Year

The **Add Expenses** window will now display on the right side of the screen. Click on **Create New** in the **Add Expenses** window to see all of the expense options.

The screenshot shows the 'Add Expenses' window with the following structure:

- Header:** + New | Nicolene Capra
- Left Sidebar:**
  - Add Expenses**
    - Create New** (highlighted with a yellow arrow)
  - eWallet**
    - All
    - Trips
    - P Card**
    - Offline
    - Recycle Bin
  - eReceipts**
    - Receipt Gallery
- Main Grid of Expense Categories:**
  - TRAVEL
  - MEALS / ENTERTAINMENT
  - UTILITIES AND COMMUNICATION
  - POSTAGE AND PRINT
  - ADVERTISING
  - DUES / FEES
  - RENTAL AND LEASES
  - CONTRACTED SERVICES
  - NON EMPLOYEE TEACHING AND OTHER SERVICES
  - MAINTENANCE
  - SUPPLIES
  - EQUIPMENT
  - MISCELLANEOUS
  - GIFT CARDS
  - BOOKS AND SUBSCRIPTIONS
  - TRAINING AND CONFERENCE
  - CASH ADVANCE

In the tile mosaic, select **'Meals/Entertainment'**,  
Followed by **'Meals – Per Diem Wizard'**.



Complete the Per Diem wizard form on the left with the following information:

1. Start Date – Enter the 1<sup>st</sup> date you are claiming per diem.
2. End Date – Enter the last date you are claiming per diem.
3. Days – This will calculate automatically based on the dates entered above.
4. Business Purpose – Enter a clear, detailed business purpose.
5. Location – Enter the location in which you will be claiming per diem.
6. Once completed, click on ‘Add to Preview’ at bottom of screen.

**Per Diem Wizard**

**Start Date** 08/02/2021 00:00

**End Date** 08/06/2021 23:59

**Days** 5

**Business Purpose** Conference

**Description** Optional New York Conference

**Location** New York-New York County, New York (NY), United States

**Allocation** 10-000-700300-0000 10-General Operating Budget 700300-Controller's Office / 0000-General Activity

+ Add Allocation Presets CREATE PRESET

Cancel Add To Preview

The system will create an entry for each day, displayed on the right side of the screen.

Select whether the meal is Breakfast, Lunch, Dinner, or Travel Day.

When finished, click on 'Apply' at the bottom of the screen.

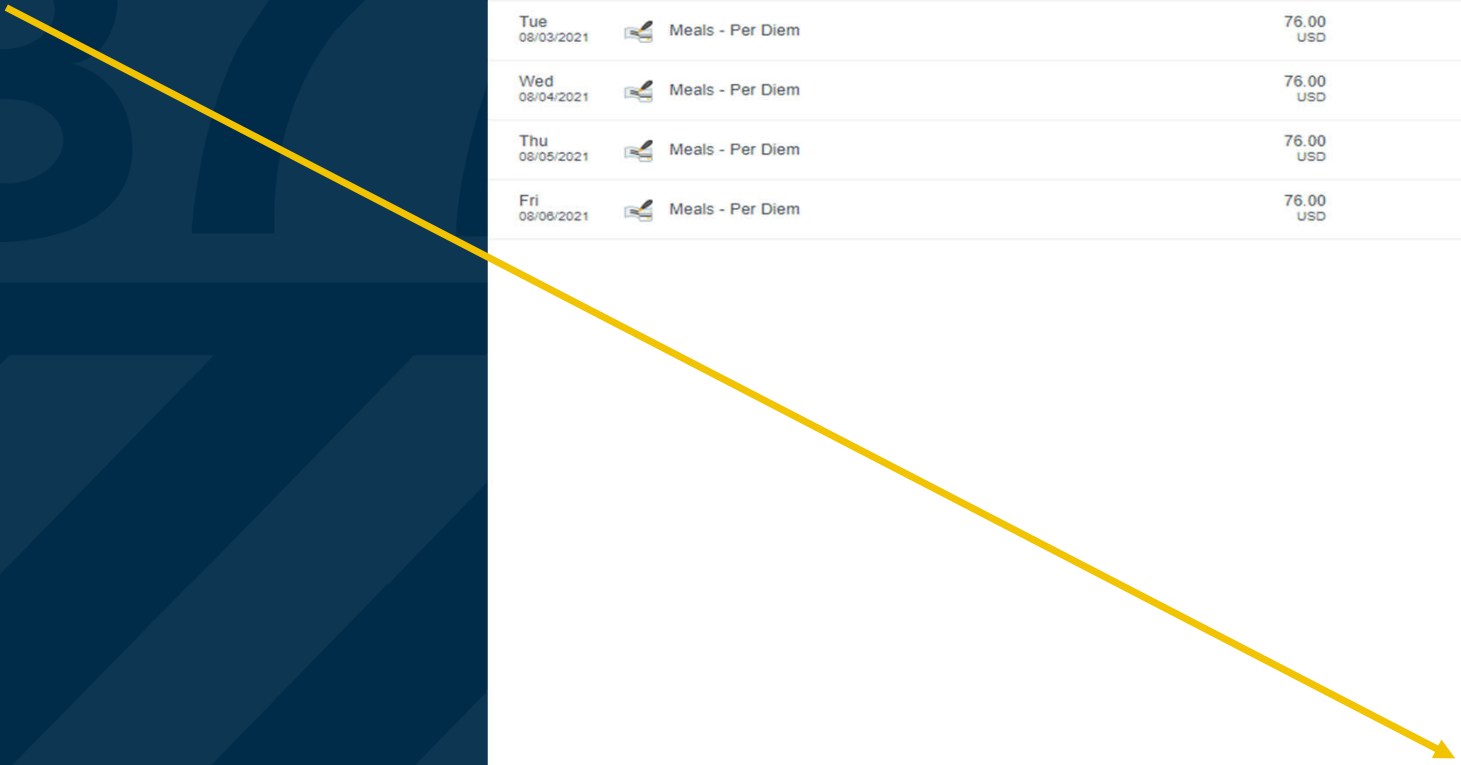
**Per Diem Rates Preview**

Date	Location	Rate (USD)	Actions
▼ Mon 08/02/2021 01:00-23:59	New York, New York (NY), United States	76.00 USD	🗑️ ✎️
<b>DEDUCTIBLES</b>			
<input type="checkbox"/> Breakfast <input type="checkbox"/> Lunch <input type="checkbox"/> Dinner			
<input type="checkbox"/> Travel Day <input type="checkbox"/> Additional Deduction			
> Tue 08/03/2021 00:00-23:59	New York, New York (NY), United States	76.00 USD	🗑️ ✎️
> Wed 08/04/2021 00:00-23:59	New York, New York (NY), United States	76.00 USD	🗑️ ✎️
> Thu 08/05/2021 00:00-23:59	New York, New York (NY), United States	76.00 USD	🗑️ ✎️
> Fri 08/06/2021 00:00-23:59	New York, New York (NY), United States	76.00 USD	🗑️ ✎️
> Sat 08/07/2021 00:00-23:59	New York, New York (NY), United States	76.00 USD	🗑️ ✎️
> Sun 08/08/2021 00:00-23:59	New York, New York (NY), United States	76.00 USD	🗑️ ✎️
> Mon 08/09/2021 00:00-23:59	New York, New York (NY), United States	76.00 USD	🗑️ ✎️

Clear All Apply

Your report will now have a line item for each day of per diem reimbursement listed on the report summary.

Click on 'Submit'.



← Expenses For Nicolene Capra

### Per Diem New York Conference

0 Comments 0 Attachments

DATE	EXPENSE	SPENT	PAY ME
Mon 08/02/2021	Meals - Per Diem	76.00 USD	76.00 ✓
Tue 08/03/2021	Meals - Per Diem	76.00 USD	76.00 ✓
Wed 08/04/2021	Meals - Per Diem	76.00 USD	76.00 ✓
Thu 08/05/2021	Meals - Per Diem	76.00 USD	76.00 ✓
Fri 08/06/2021	Meals - Per Diem	76.00 USD	76.00 ✓

Expense Report 010023650663

Total Pay Me Amount **380.00** USD

**Submit**



# QUESTIONS?

Per Diem Expenses

[invoice@regis.edu](mailto:invoice@regis.edu)

# THANK YOU!

## CHROME RIVER EXPENSE REIMBURSEMENT TRAINING



**REGIS**  
**UNIVERSITY**

Presenters:

Brook Thompson, Controller  
Nicolene Capra, Accounts Payable Specialist

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