CHROMERIVER by emburse Quick Start Guide

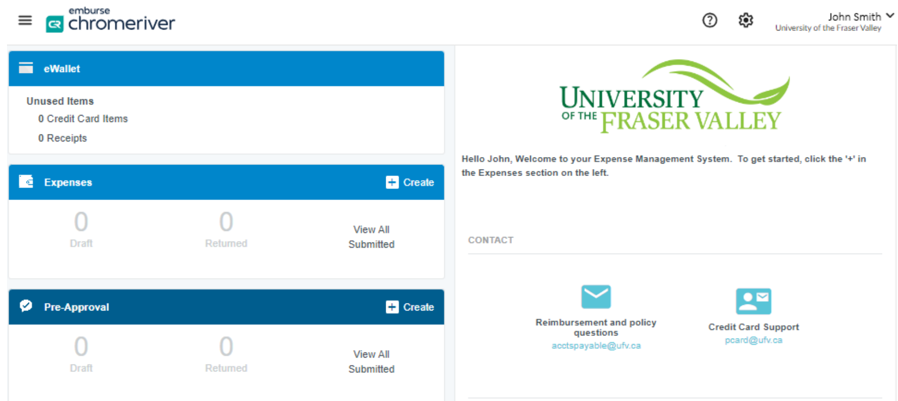
UNIVERSITY OF THE FRASER VALLEY

Accessing Chrome River

Visit Chrome River from any device:

- https://www.ufv.ca/chromeriver
- myUFV card
- Chrome River mobile app

If prompted, use your UFV credentials to login if prompted.



Navigating the Dashboard

The Dashboard shows an overview of the reports in the system including draft, returned, submitted and reports awaiting approvals. The **Toggle Menu** (☰) at the top-left corner will open a menu similar to the Dashboard. In addition, you can also access your eWallet and eReceipts through the menu.

Create an Expense Report

1. From the dashboard click the +Create (Create) button in the Expenses section
2. Type in a Report Name and select the appropriate option for the type of report:
   - DTA Claim: to claim your Development and Training Allowance
   - PD Expense Claim: Submit expenses related to approved Professional Development
   - Expense Claim: Submit all other expenses for reimbursement
3. Click Save at the top right
4. Click on Create New (Create New) to open the tiles to select the type of expenses to be submitted
5. Select the appropriate tile(s) and fill in the required information.
6. Click Submit(Submit) when the report is ready to be submitted for approval

Approve an Expense Report

If you are an Approver, you will receive an email indicating you have an Expense Report in Chrome River where you need to login to take action (review, then approve or return). After login, the number of Expense Reports waiting for approval will show in the Approvals Bar.

1. Click within the section of the Approvals bar to show the list of reports.
2. Click on a report in the list to review and click Open to see the details of each item within the report
3. After reviewing the Expense Report:
   - Click **Approve** located in the bottom-right of the left panel, then **Approve** again to automatically route to the next employee/group **OR**
   - Click **Return** located in the bottom-left of the left panel and the report is returned to the expense owner for remediation.

For Expense Reports you can return single line items instead of the whole report. Adjust (lower only) or Return this line item for remediation by clicking the button in the top-right pane.

Send a Receipt

There are four different methods to sending and attaching receipt in Chrome River:

- Snap and send: using the Chrome River app *CR Snap*, take a picture of the receipt and it will load into your account
- Email: Scan a copy of the receipt, or take a photo of the receipt with your phone and email it to receipts@ca1.chromeriver.com. NOTE: Only jpeg, pdf, png and tiff files are accepted.
- Drag and Drop: From a computer, drag and drop the document into the header or line item of the expense report.
- Attach: Using the buttons within the expense report in Chrome River, select the document to attach

Setup a Delegate

1. Click on your name in the top right corner and select Account Settings (Account Settings)
2. From the left menu, choose Delegate Settings
3. Click the + for the type of Delegate to be setup:
   - Delegate: someone who can access your account and create expense reports on your behalf; Multiple employees can be setup as a Delegate at one time
   - Approval Delegate: someone that will receive reports to approve during the time period specified. Only one employee can be setup as an Approval Delegate at a time.

For more information visit: https://www.ufv.ca/finance