## Contents

- Introduction .................................................................................................................. 2
- Monthly Paper SPCC Statement ......................................................................................... 3
- Completing Chrome River SPCC Expense Report .............................................................. 4
- Account Codes .................................................................................................................... 13
- Chrome River Snap App ................................................................................................... 13
- Common Error Messages .................................................................................................. 14
  - Duplicate Entry ............................................................................................................... 14
  - Receipt Required ........................................................................................................... 14
- Tips and Tricks .................................................................................................................... 15
- Electronic BOA Statements ............................................................................................... 15
- Signing on to Chrome River ............................................................................................... 16
- Chrome River Landing Page ............................................................................................... 17
- Getting Started .................................................................................................................. 18
  - Navigation Bar ............................................................................................................... 18
  - Navigating Back to Landing Page ..................................................................................... 18
  - Acting as a Delegate ....................................................................................................... 18
  - Terminology Guide ......................................................................................................... 20
  - Managing Delegates ...................................................................................................... 22
Introduction

Chrome River is an automated travel and expense management system that utilizes technology to streamline the travel and small purchase charge card (SPCC) process. Radford University travelers and cardholders utilize Chrome River to request permission to travel, request reimbursement for travel expenses, and reconcile charge card purchases for processing. Chrome River is configured to ensure compliance with university and state policies and procedures. Electronic routing within Chrome River is designed to ensure proper approvals are obtained in accordance with university policy. The system allows travelers to assign delegates who can enter requests on their behalf. Approvers can also assign approver delegates to act on their behalf in accordance with delegated authority for limited periods of time.

Processing a Chrome River SPCC expense report will replace the current paper reconciliation log. All documentation currently required to be attached to the paper log will now be attached to the Chrome River expense report. Policies and procedures related to the SPCC card program have not changed.

Chrome River SPCC Reconciliation Process

1. Monthly Bank of America (BOA) statement
2. Chrome River SPCC expenses (received electronically from BOA)
3. Reconcile Statement with transactions in Chrome River to create Expense Report
4. Complete Chrome River Expense Report and submit for approval
Monthly Paper SPCC Statement

The receipt of the monthly paper statement will provide important information needed to process the Chrome River SPCC Card expense report. Information on how to obtain an electronic copy of your monthly statement is provided under the Electronic BOA Statements section below.

Attach copy of paper statement to expense report.

Start and End Dates for Expense Report

Individual transactions are fed from BOA and stored in the cardholder's Chrome River eWallet. These transactions are to be added to Expense Report.
Completing Chrome River SPCC Expense Report

1. Select New Expense Report

2. FIRST: Under PURPOSE select “SPCC-Card” (this will limit the required fields for the expense report)
   Enter REPORT NAME, such as “SPCC-March 2020”
   Add START and END DATES that directly correspond with the SPCC statement (must be for the entire statement period).
   Click SAVE.
3. All transactions from BOA will be loaded into the cardholders eWallet. To add Expenses from eWallet to the Expense Report, select Credit Card, check the items that correspond to transactions on the BOA statement and click ADD.

4. Each transaction will require the assignment of a expense type of the flyout. Click on the appropriate icon to select the appropriate tile for assigning to the correct account code.
Select Valid Expense Type

- AP USE ONLY - SPCC
- ATHLETIC TEAM TRAVEL - SPCC
- AWARDS AND INCENTIVES - SPCC
- EQUIPMENT - SPCC
- FOOD AND BEVERAGE - SPCC
- INTERNATIONAL TRAVEL - SPCC
- RECRUITING TRAVEL - SPCC
- RENTALS - SPCC
- SERVICES - SPCC
- SUPPLIES - SPCC
- TRAVEL RELATED - SPCC
- SPLIT CODING EXPENSE - SPCC
5. Complete the information on the flyout for the transaction and click Save. Information in grey boxes is preloaded and fed from BOA and cannot be changed or adjusted.

### Travel Related - SPCC

<table>
<thead>
<tr>
<th>Date</th>
<th>09/20/2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spent</td>
<td>450.00 USD</td>
</tr>
<tr>
<td>Justification</td>
<td>Conference Registration for (name of traveler)</td>
</tr>
<tr>
<td>Merchant</td>
<td>NACUBO</td>
</tr>
<tr>
<td>Merchant Country</td>
<td></td>
</tr>
<tr>
<td>Merchant Postal Code</td>
<td></td>
</tr>
<tr>
<td>Point of Sale</td>
<td></td>
</tr>
<tr>
<td>eVA or CR PA#</td>
<td>Add Chrome River PA #</td>
</tr>
<tr>
<td>Account Code</td>
<td>712240 - Emp Training Courses/Workshops/Conf</td>
</tr>
<tr>
<td>Allocation</td>
<td>204103 Fin Reporting/Gen Accounting F11020 Higher Educ Operating-E&amp;G - 0300</td>
</tr>
</tbody>
</table>

**Justification:** Provide business reason for purchase.

**eVA or CR PA#:** Provide either the eVA Purchase Order # or the Chrome River Preapproval # for the transaction. A copy of the actual eVA PR or the CR PA does not need to be added.

**Account Code:** Select the appropriate Account Code from the drop box.

**Allocation:** Choose Banner organization code and/or fund.

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### POINT OF SALE TRANSACTIONS

**Justification:** Provide business reason for purchase.

**eVA or CR PA#:** Not required

**Point of Sale:** Check box

**Account Code:** Select the appropriate Account Code from the drop box.

**Allocation:** Choose Banner organization code and/or fund.
6. To allocate the expense to Multiple Fund/Orgs, add an additional Fund/Org and the proper dollar or percentage amount for each to be charged.

- Allocation: Allocations can be split to multiple FOP’s. Amounts can be split equally (as shown) or the amounts can be allocated as needed. (For example - $200 to org code 20103 and $250 to org code 20109)

7. If you need to allocate the total expense transaction to multiple account codes, under the proper Expense type tile select the tile “Split Coding Expenses-SPCC”.

Services - SPCC
Click on the Itemize button.

Choose the appropriate tile for that portion of the expense transaction.
Complete the required information and Save.

<table>
<thead>
<tr>
<th>Date</th>
<th>10/10/2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spent</td>
<td>$95.00 USD</td>
</tr>
<tr>
<td>Justification</td>
<td>conference registration $200, membership $95</td>
</tr>
<tr>
<td>Merchant</td>
<td>OCU SPECIAL EVENTS</td>
</tr>
<tr>
<td>Merchant Country</td>
<td></td>
</tr>
<tr>
<td>Merchant Postal Code</td>
<td></td>
</tr>
<tr>
<td>Point of Sale</td>
<td></td>
</tr>
<tr>
<td>eVA or CR PA#</td>
<td>Add Chrome River PA#</td>
</tr>
<tr>
<td>Account Code</td>
<td>712210 - Organization Memberships</td>
</tr>
</tbody>
</table>

**Spent:** Amount to be allocated to the Account Code below.

**Justification:** Provide reason for purchase.

**eVA or CR PA#:** Not required

**Point of Sale:** Check box

**Account Code:** Select the appropriate Account Code from the drop box.

**Allocation:** Choose Banner organization code and/or fund.

Click itemize to create the next coding change and follow the steps above to complete.
When all account code splits and allocations have been completed, the **Remaining Total** will be 0.00 and the **Total Amount** will equal the charge.
8. Once all transactions have been assigned an expense type for the current statement period, verify that all items have a **green check** and the **Total Pay Me Amount** is 0.00. Also, ensure all expenses listed on the BOA statement are included prior to submitting the report.

Prior to **Submission**, verify that all items have a **green check**, the **Total Pay Me Amount** is 0.00 and **all expenses listed on the BOA statement** are included.

Submitted reports will route to the Supervisor for approval. A **Chrome River Supervisor Checklist** is available on Accounting Services website.
Account Codes

Listings are available that shows the Expense Types and the associated account codes on the Accounting Services webpage under Forms and Documents, Small Purchase Charge Card.

Account Code-Chrome River Expense Type/SPCC Listing-By Account Code
Account Code-Chrome River Expense Type/SPCC Listing-By Expense Type

Chrome River Snap App

Chrome River provides a mobile app to users, Chrome River SNAP, which will quickly and easily capture and upload receipt images. Users simply snap a photo of the receipt using the app and the receipt will upload directly to your Receipt Gallery in Chrome River. Benefits of the app include:

- Photos taken with the Chrome River SNAP app are not stored in your device’s default photo gallery.
- Once photos are uploaded to the Receipt Gallery, they are automatically deleted from the device, freeing up storage space.
- Multiple receipts within one photo will be split into separate transactions by the system.
- Receipt upload history maintained in the app.
- Supported formats: JPG, PNG and HEIC/HEIF.
- Files must be less than 10 MB. Also, the system will cancel any uploads that take more than 60 seconds. If this occurs, retry the upload when logged onto Wi-Fi or high-speed connection.

The app is available on both Android and iOS. To download, type Chrome River SNAP in the app search engine. Follow all of the prompts to ensure proper set up.

For more in depth instructions, please go to the Help feature within Chrome River and navigate to EXPENSE>CR SNAP for Android or CR SNAP for iOS.
Common Error Messages

Duplicate Entry

This error occurs when there are multiple items with the same transaction date and amount. In the example screen print provided above, there are two transactions for $450 each that were processed on 9/20/19. In this case, these line items represent two different registrations for two different people that were processed on the same day. Always verify duplicate entries to ensure they represent two separate charges and document accordingly. This is a safeguard to ensure the card was not accidently charged twice.

Receipt Required

All transactions require receipts. Report will be returned by Accounting Services if receipts are missing.
Tips and Tricks

SPCC transactions will load to Chrome River daily, however, only one expense report will be created for each monthly statement. An expense report can be created and items added as they post to the eWallet, however, the report must remain in Draft status until the monthly statement period has closed and all items have been added to the report. Please ensure the start and end dates match the paper statement prior to submission Chrome River will allow changes to the expense header after items have been attached.

Each item can be allocated to multiple fund/orgs as well as split coded between account codes. Please ensure the entire amount of the transaction has been allocated properly prior to submission.

Accounting Support Services is the final approver for all SPCC expense reports and will review each submission to ensure it correctly reflects the total from the paper statement. A copy of the statement must be attached to the expense report as well as all necessary receipts. Incomplete or incorrect reports will be returned to the cardholder for correction. Some corrections may require moving the report back to draft. Please use the contact information for Technical Support on the Chrome River landing page.

Electronic BOA Statements

BOA statements can be obtained electronically through Bank of America’s Global Access. First time users must create an account by selecting Register a Card.

Global access is an online card management tool, that will provide the cardholder the ability to view or change PIN, set up customer alerts, lock/unlock your card and the view statements.
Signing on to Chrome River

Chrome River is available through the employee section of Radford University’s “My RU” portal. From Radford University’s homepage, click on the ‘MyRU’ button and sign in with your RU username and password. From the My RU portal, click on the “Employees” folder. The Chrome River – Travel & Expense link can be found under the Administrative Tools section. The User Guide is located directly below.
### Chrome River Landing Page

**Approvals Needed**
- 1 Expense Reports
- 8 Pre-Approvals

**Expenses**
- **33** Draft
- **0** Returned
- **12** Submitted Last 90 Days

**Pre-Approval**
- **10** Draft
- **2** Returned
- **7** Submitted Last 90 Days

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Show a summary dashboard of the Approvals that are pending review as well as Expenses (Expense Reports) and Pre-Approvals that are in Draft, Returned, and Submitted status for the employee.

Provides important Contact, Notices, and Help information. Please contact Accounts Payable for Travel policy questions and Technical Support for technical issues.
Getting Started

Navigation Bar

The Navigation Bar remains at the top at all times. Depending on the size of your screen, it may display text or icons.

Navigating Back to Landing Page

Click the Chrome River Logo button in the Navigation Bar to return to the Dashboard at any time.

Acting as a Delegate

A listing of those who you have delegate access for will appear under your name in the upper right hand corner of the landing page.

Click on your name:
The menu bar will appear showing travelers for whom you have delegate access:

Select the traveler you wish to enter a report for:

The traveler’s name will now appear in the upper right hand corner instead of your name:
Terminology Guide

**Main Menu Tiles**-Expense groupings of the various types of Credit Card expenses incurred.
Fly Out - Form used to provide details of a specific expense.

**Services - SPCC**

- **Date**: 03/20/2020
- **Spent**: 42.00 USD
- **Justification**: 
- **Merchant**: USPS PO 5174101141
- **Merchant Country**: 
- **Merchant Postal Code**: 
- **Point of Sale**: 
- **eVA or CR Part**: 
- **Account Code**: — Select —

**Allocation**

Search for Allocation

**Downloaded Details**

<table>
<thead>
<tr>
<th>Date</th>
<th>03/20/2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount Spent</td>
<td>42.00 USD</td>
</tr>
<tr>
<td>Amount Original</td>
<td>42.00 USD</td>
</tr>
<tr>
<td>Transaction Name</td>
<td>USPS PO 5174101141</td>
</tr>
<tr>
<td>Merchant</td>
<td>USPS PO 5174101141</td>
</tr>
<tr>
<td>Details</td>
<td></td>
</tr>
</tbody>
</table>

Drag image here to upload

Add Attachments
Managing Delegates

Depending on the size of your screen, you can click the User icon or your User Name in the right corner of the Navigation Bar to assign a delegate.

To add or modify a delegate click Settings then Delegate Settings.

A Delegate can be assigned to enter a pre-approval or expense report on your behalf. A delegate can also process monthly SPCC reconciliation expense reports.

An Approval Delegate can be assigned to approve a pre-approval or expense report on your behalf for a specified time. The assigned approval delegate will receive all email correspondence for approvals.

To add a delegate click the + icon and type in the name. The approval delegate must have a start and end date for delegation.