Getting Started with Chrome River

Log in to MyU (myu.umn.edu)

Navigate to: Key Links > U Travel / Chrome River > Chrome River Login

Chrome River (CR) is used by faculty and staff with active employment records to reconcile travel-related and non-travel-related expenditures. Expenditures will be from the use of a Travel & Expense Card (T&E Card) or out-of-pocket. CR also tracks pre-approvals and requests for cash advances when applicable. Contact your local CR expert for guidance (see directory listing).

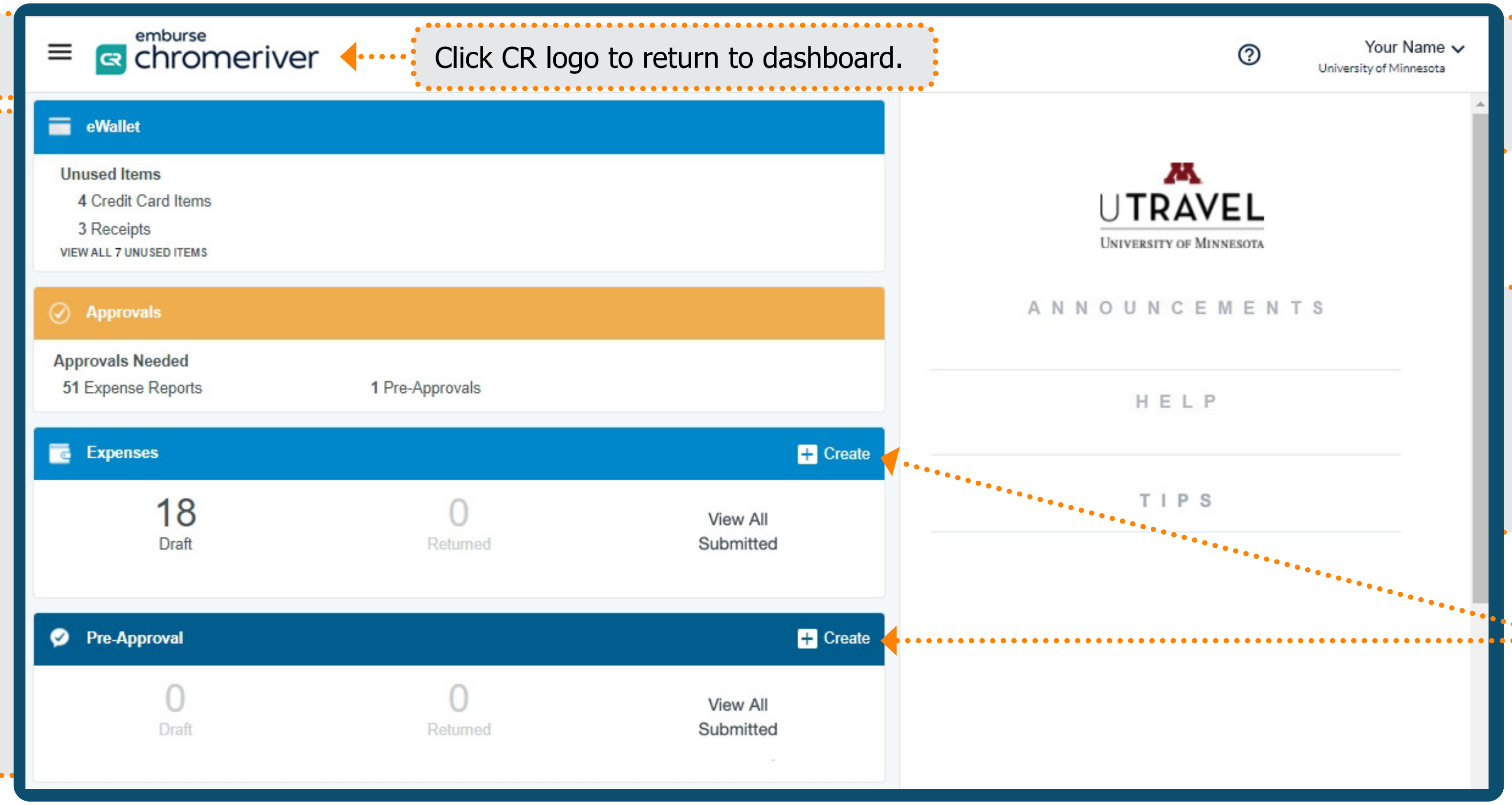
Click triple bar to access navigation menu.

Access eWallet, Approvals, Expenses, or Pre-Approval.

Click <Draft>, <Returned>, or <View All Submitted> to view specific reports.

Access is based on your role.

Click CR logo to return to dashboard.



Click name drop-down menu to access Account Settings and delegates.

Review announcements, help options, and tips.

Click <+ Create> to start an Expense Report or Pre-Approval Report. After expenses are added to report, click<Save>.

① Upload Receipts

- Via **Email**: Send image of the receipt to **receipt@chromefile.com** from University email.
- Via **CR SNAP** (see job aid pdf): Take a picture using the CR SNAP smartphone app.
- Via **Computer**: Upload image file from computer to CR.

Most receipts convert to expense transactions based on receipt date, amount, and merchant name.

② Create New Report

- **Expense Reports** (see job aid pdf) are created to account for T&E Card purchases, out-of-pocket business expenses, and for requesting cash advances when applicable.
- **Pre-Approval Reports** (see job aid pdf) are created for tracking pre-approvals for business trips. Pre-approvals are required for certain units.

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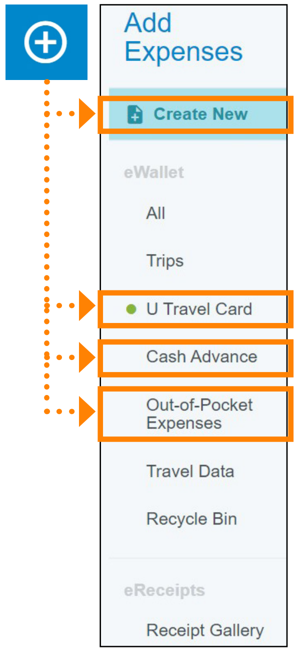
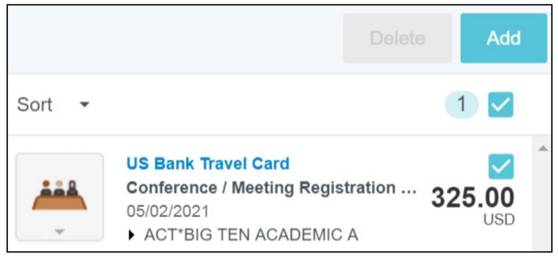
3 Add Expenses to Report



Green dot indicates expenses are ready to process.

Trips and Travel Data are not used.

<U Travel Card>
Add expenses created by T&E Card transactions. Uploaded receipts are matched with the T&E Card transactions automatically. Verify for accuracy.



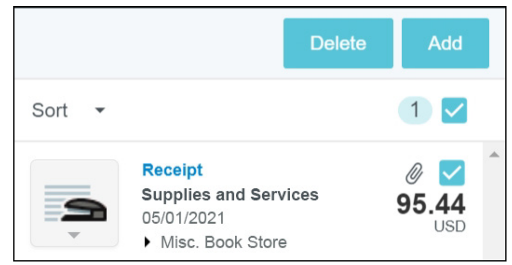
Note: T&E Card transactions are not uploaded immediately. Be patient and do not process a T&E Card transaction using the <Out-of-Pocket Expenses> link.

<Cash Advance>
Cash advances are rare. Specific criteria must be met to qualify for a cash advance.

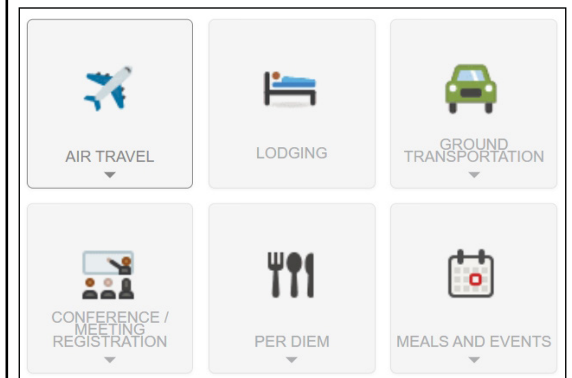
See [Cash Advances policy].

<Out-of-Pocket Expenses>
Add expenses created by uploaded receipts to the report. Expenses do not match existing T&E Card expenses and therefore are considered out-of-pocket expenses.

Most receipts convert to expense transactions based on receipt date, amount, and merchant name. Verify for accuracy.

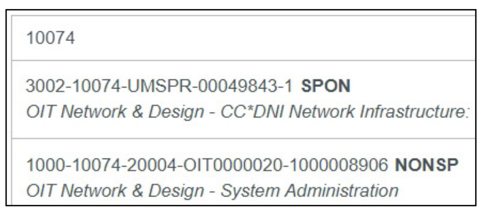


<Create New>
Add expenses based on expense type. These expenses do not require receipts: meal per diem, mileage, and expenses less than $25.00. Lodging always requires itemized receipts.



4 Select ChartField String and Account Value

Select your ChartField String.*



Select the Account.

*If uncertain about which ChartField string to select, contact your unit finance person for guidance. Previously used ChartField strings are saved by the system and will be remembered.

5 Submit Report

- Click <Submit> to route the report for approval.
- Approvers verify all transactions are allowable and within policy.

ATTENTION

Specific expense types cannot exceed allowable per diems. Automatic per diem rates are applied to these expense types.

Per Diem   Mileage   Lodging

Expenses missing required information will be flagged. Read messages and resolve the violation.