**CHROME RIVER QUICK GUIDE – CREATING A NON TRAVEL EXPENSE REPORT (DIRECT PAY)**

1. Click “Create New”

New Expense Report

Enter Report Name

(NT prefix to identify

Expense Report type,

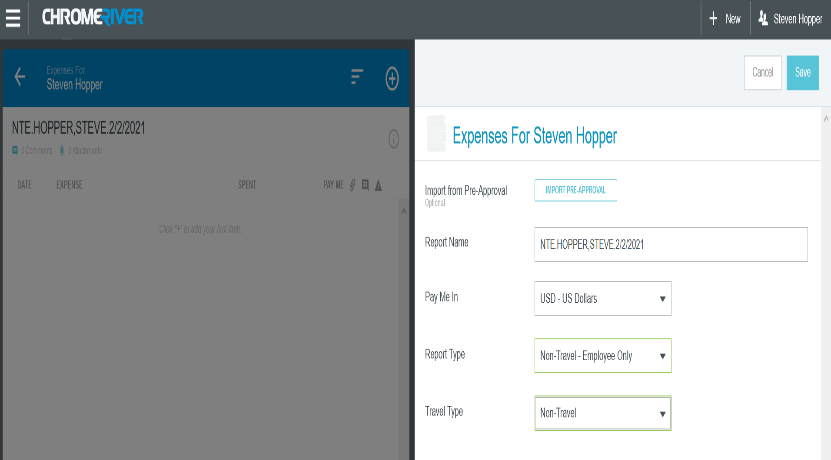
cardholder last name, first name, receipt date)

example NTE.Steve Hopper.02/02/2021

Select “Non-Travel - Employee Only”

from the Report Type dropdown

Select “Non-Travel” from the Travel Type dropdown

Click “Save”

1. Select Valid Expense type

Enter the Transaction Date

Enter the Transaction Amount

Enter a detailed Business Purpose

If needed, enter Description

Select Account from the dropdown list

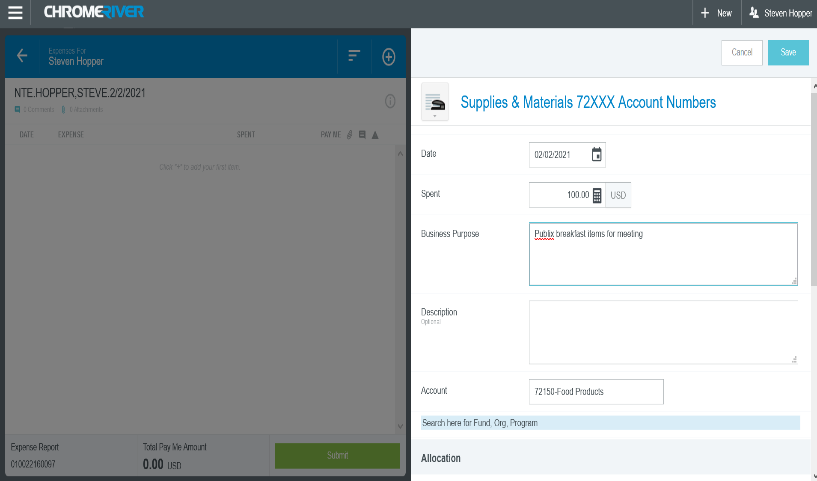
Allocation Section

Select FUND and ORGN from the dropdown list

Select Non-Travel from the Expense Type dropdown list

Select Activity code if applicable. Select “Select Activity

Code or Use This if N/A” for 0000



**3.** Methods: Receipt Gallery, Upload from PC

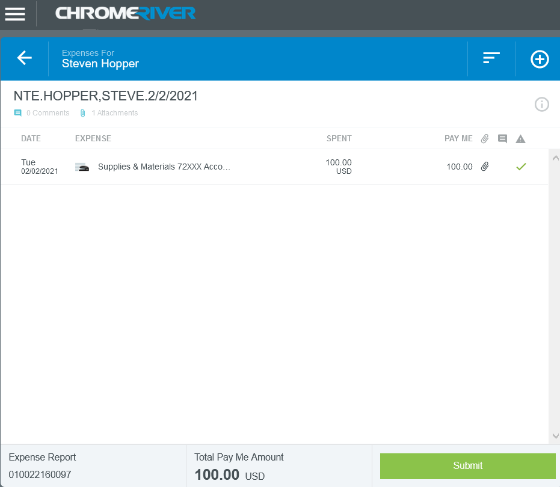
Receipt Gallery stores the attachments (receipts and

backup documentation) that are submitted electronically (emailed or CR SNAP) Upload scanned receipts and backup documents from PC

Use caution when scanning documents to ensure that no confidential information is scanned. Redact credit card info, research participant names, etc.

NOTE: Attachments must be formatted as PDF, JPEG, PNG, or TIF

1. After all transactions are added to the Expense Report,

Click Submit for Confirmation.

The Expense Report will be listed on the Chrome River Dashboard in the Submitted Section

After the Expense Report is Submitted, the automated approval routing process begins as follows:

Expense Owner Approval

HR Supervisor Approval

Approval routing based on the business rules built into Chrome River

Approval by the Chrome River Office Staff

Transaction feeds to Banner nightly

Automated emails will be sent after each level of approval. Within the email will be a link for the approver to open and view the Pre-Approval Report or Expense Report. The approver can approve the Chrome River request within the email.