



**SOUTH TEXAS
COLLEGE**

Chrome River Travel

Training Manual – Getting Started

Business Office

traveloffice@southtexascollege.edu

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Getting Started

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Crosswalk:

Description	TEMS	See in Banner Finance	Chrome River	See in Chrome River	See in Banner Finance
Encumbrance	TA	TA- FGIENCD	010000xx	010000xx	CE - FGIENCD
Travel advance	TV	TV - FAIVNDH			CV – FAIVNDH
Travel voucher	TR	TR - FAIVNDH			CR - FAIVNDH

During testing you will see “QA” instead of “01”.

Welcome to ChromeRiver

Banner/Ellucian will not support the Travel and Expense Management System (TEMS) after December 2020, therefore, TEMS is being replaced by Chrome River.

Banner TEMS travel items will be available through Argos reports in the future from the Travel Office.

ChromeRiver was selected for the user-friendly nature as well as the fact that Ellucian (who provided us with TEMS) recommended ChromeRiver as our replacement travel system.

Travel Office Staff:

Maricarmen Ramirez, Accounting Group Supervisor X4609

mramirez@southtexascollege.edu

Tonya Ecker, Accounting Assistant X4618

tecker@southtexascollege.edu

Melissa Lara, Accounting Assistant X4656

mmendoza_0438@southtexascollege.edu

Travel office email: traveloffice@southtexascollege.edu

Accessing ChromeRiver

ChromeRiver can be accessed through:

- Jagnet
- Application on mobile device

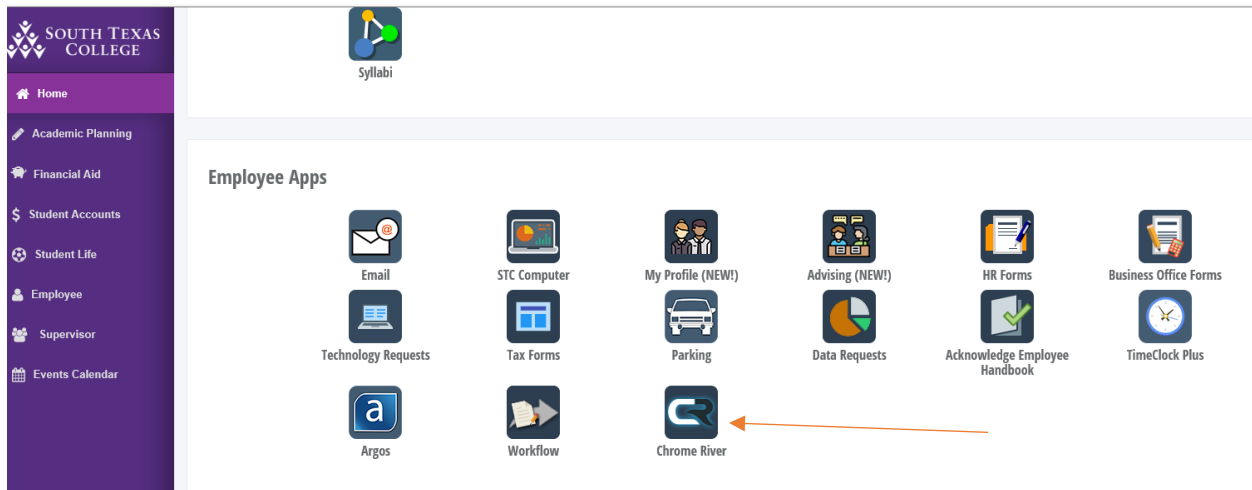
Supported Desktop Browsers

- Google Chrome
- Microsoft Edge
- Mozilla Firefox
- Apple Safari: Note that Chrome River does not currently support Safari in “Private” mode. Users must turn off Private mode before logging in to Chrome River

Because Microsoft is deprecating Internet Explorer, it is no longer included in this list. Chrome River will continue to run on Internet Explorer until the browser is retired.

Logging into Chrome River Via SSO

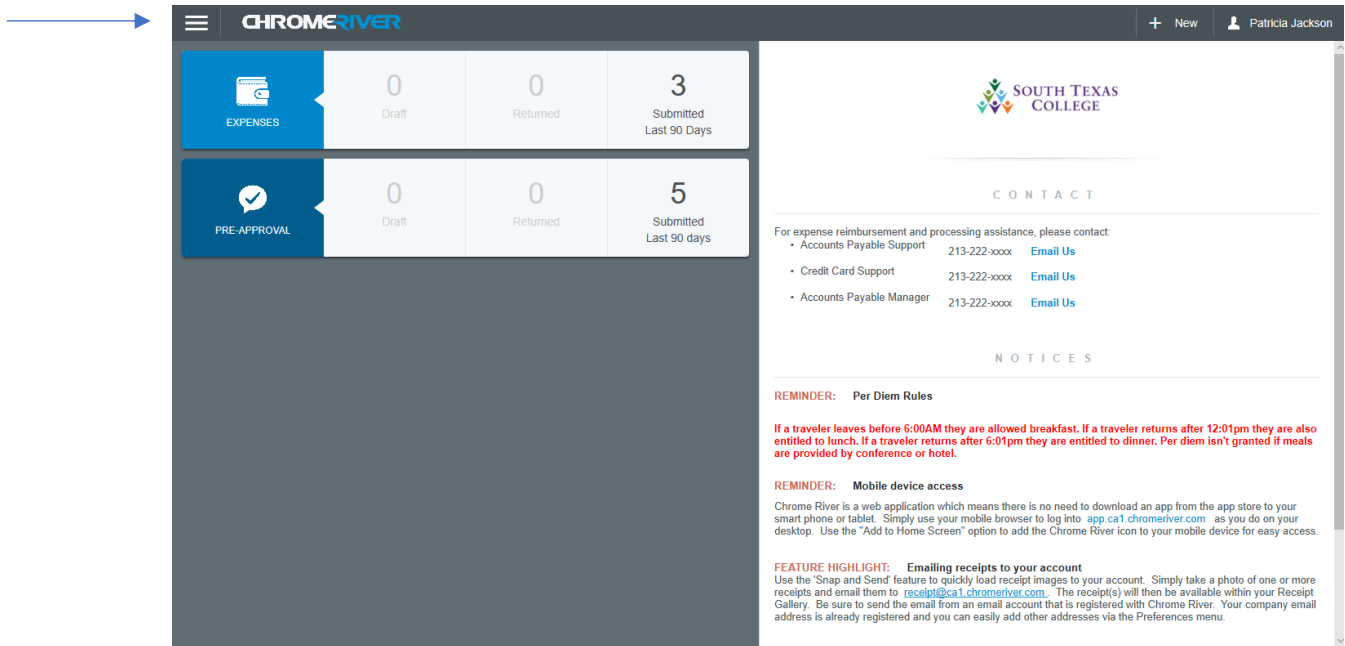
Log into Jagnet and an Icon will be provided under the Employee Apps that says Chrome River. Since we are on single sign on applications it will automatically log you in.



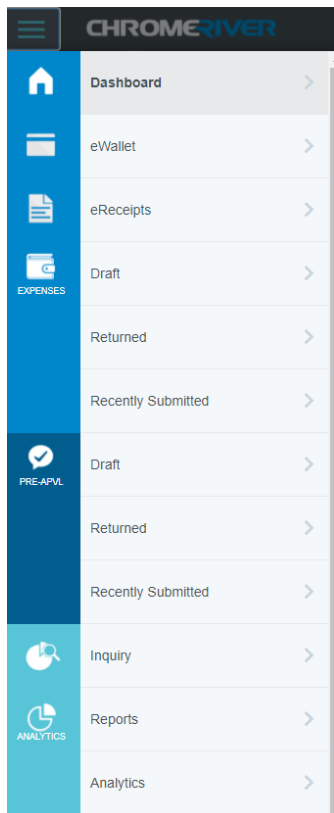
Logging in on Mobile Device

Additional information available in Chrome River help desk. See pages 7 and 16.

Once signed in ChromeRiver will open up to the Home or Dashboard view



On the upper left-hand corner, the hamburger symbol is displayed and by clicking on it, a new menu of items is displayed, see example below:

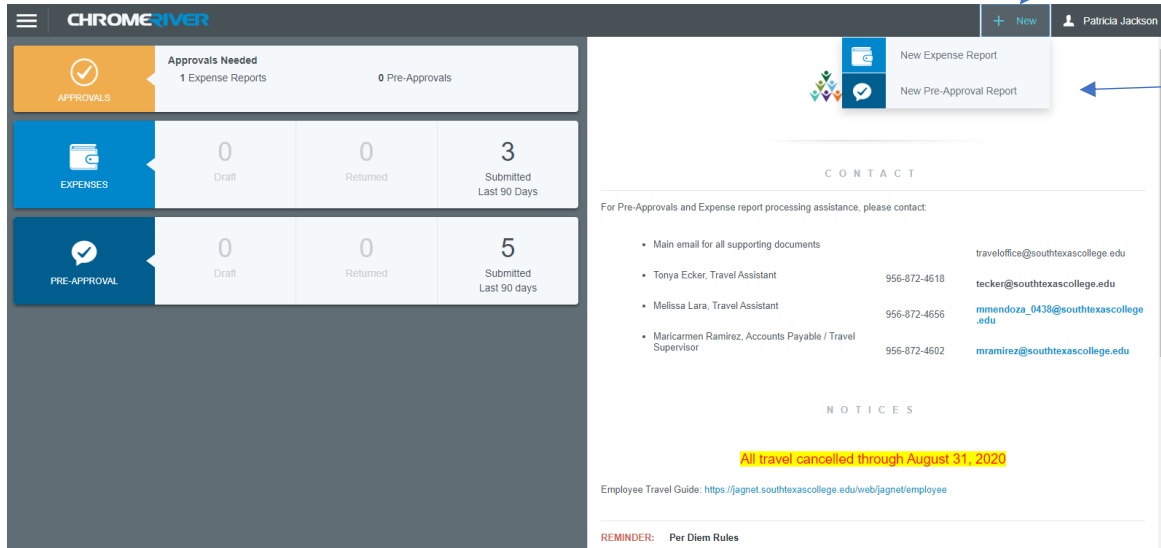


The left half of the screen gives you a quick summary view of your expense and pre-approval reports and their status.

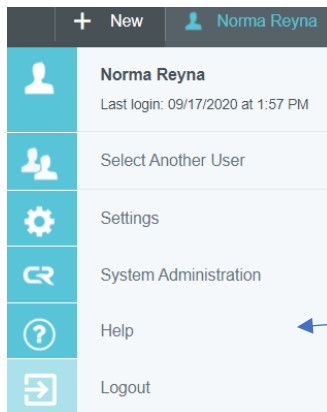
The right half of the screen will provide information, reminders and links to help you in processing travel related requests.

Also, on the right side of the screen, the +New button is available to quickly start a new expense or pre-approval report.

Click the +New button then click New Pre-Approval Report from the drop-down list.



If you click on your name in the upper right-hand corner, the menu related to the user is displayed. First item is your last login information and the second option is to select another user. ChromeRiver allows for you to delegate complete access to process travel on your behalf to another person. The system will also allow approval access to be delegated to another user. Both of these options are accessed by clicking the Settings option. By selecting Help the ChromeRiver Help Center will open on a different page and you can search for any item. Finally, the Logout option will log you out of the system.



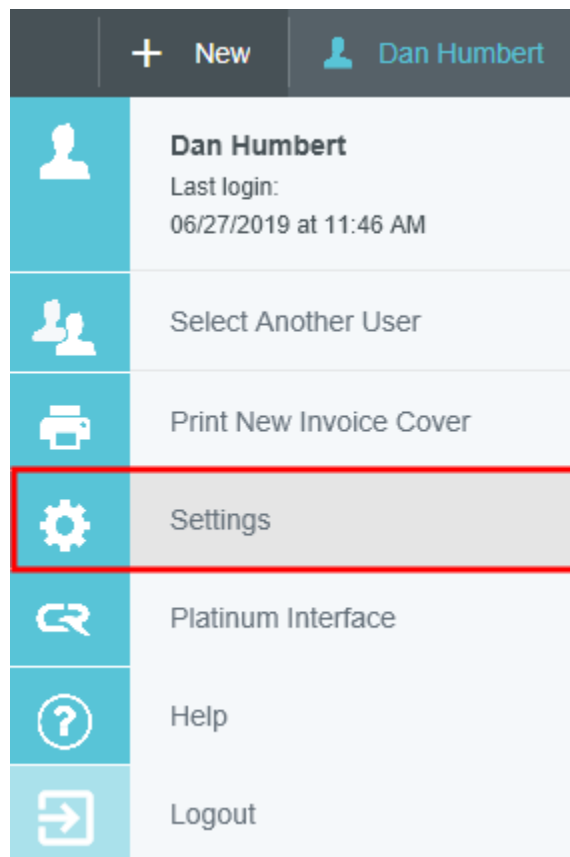
Delegate Access

Chrome River offers two types of delegate access to allow users with appropriate permissions to create and/or approve reports.

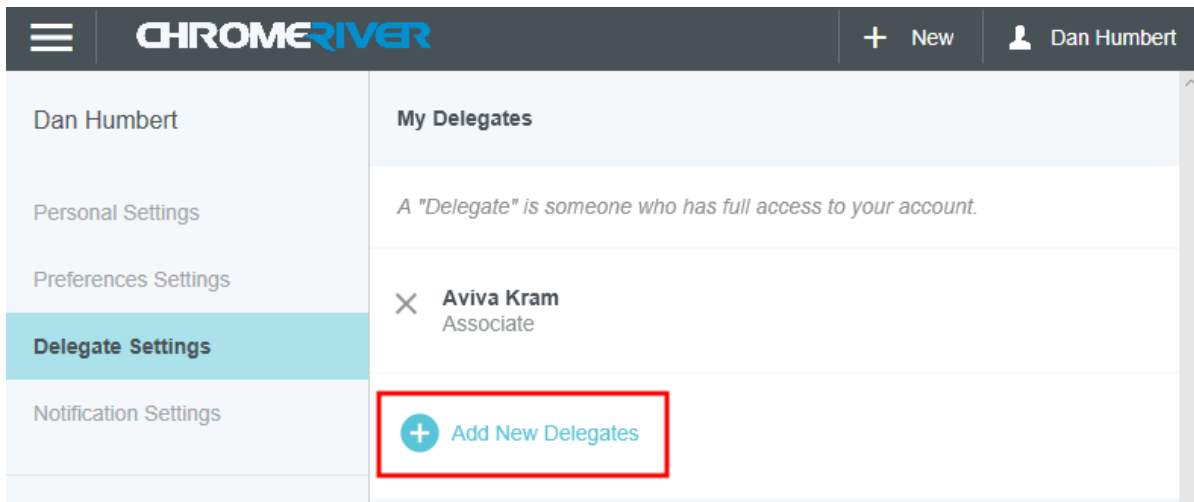
- **Delegate:** Create expense reports and pre-approvals for another user and access his or her Settings menu, Home screen and Inquiry Reports. You will receive copies of any e-mail notifications regarding rejection or adjustment of reports created for the user. However, you will not be able to approve expenses, pre-approvals or invoices that are routed to the user. *****Whoever you select as your delegate will have access to submit “as you” which will route requests to your supervisors. Supervisors / Financial Managers are responsible to verify travel requests being routed to them should be funded by them.*****
- **Approval Delegate:** Temporarily approve pre-approvals and expense reports for another user—for example, when he or she is on vacation.

Authorize a User to Work for You

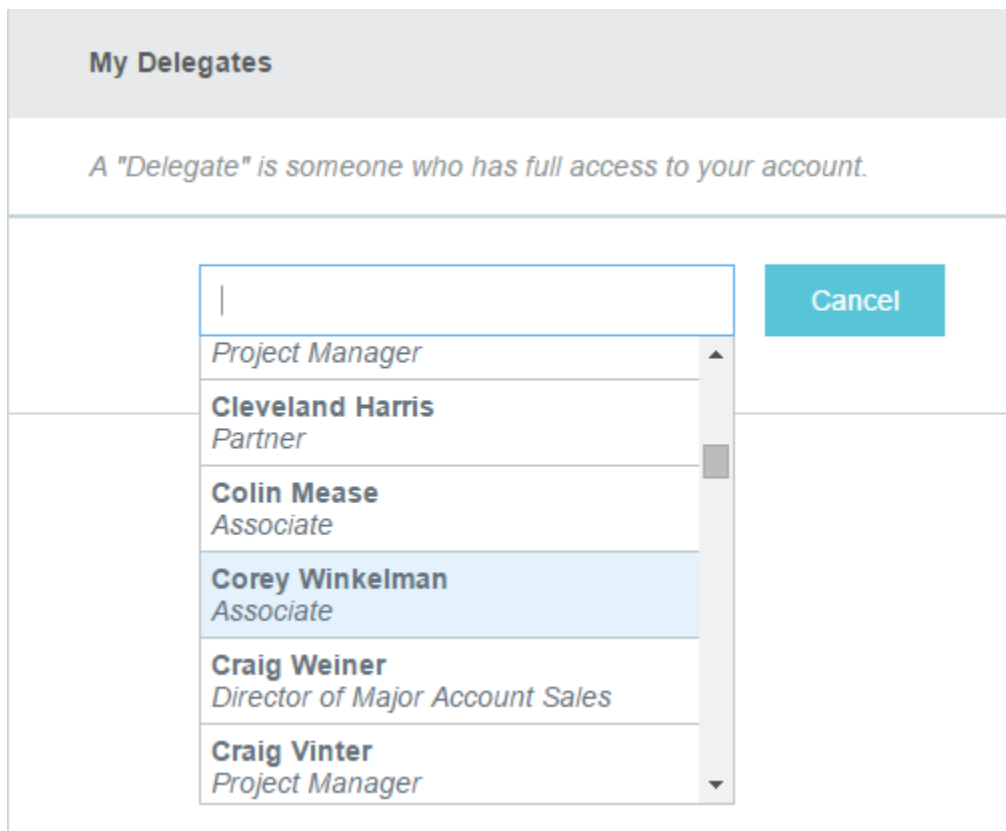
To add a user who is allowed to work as your delegate, tap your name in the upper right corner, then tap **SETTINGS**



Tap **DELEGATE SETTINGS**, then tap **ADD NEW DELEGATES**.



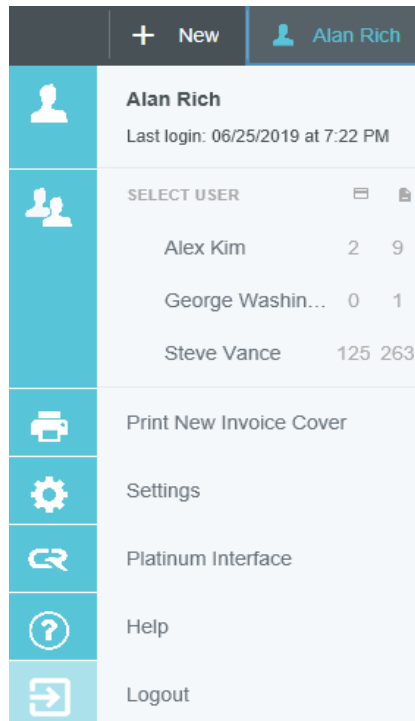
Drag the slider to scroll through the list of potential delegates or start entering the user's name to jump down the list.



Now that user will be able to select you from his or her own delegation list and create expenses on your behalf.

Work as a Another User's Delegate

When other users have authorized you to work as their delegate, you will see their names under your name when you tap it in the upper right-hand corner.



To the right of each user's name you will see the total number of their unused expense transactions and the total number of their unsubmitted reports. You will not see these totals next to your own user name.



Unused expense transactions, including credit cards, receipts, cash advances, travel data and approved pre-approvals

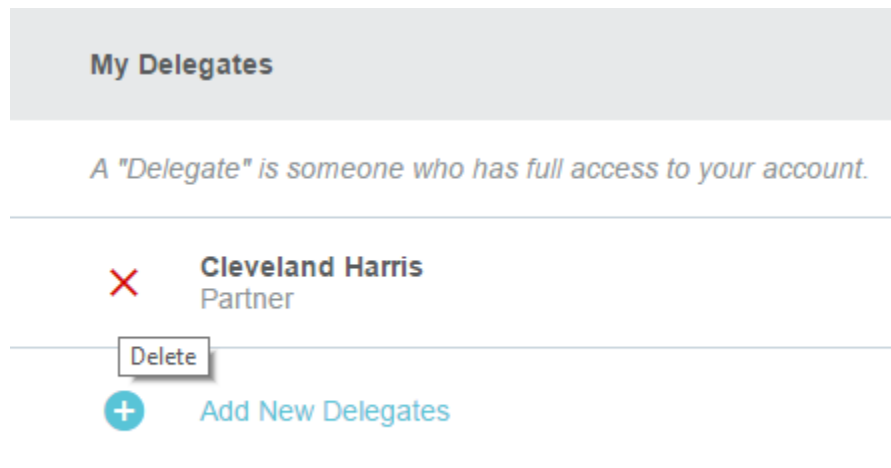


Unsubmitted reports, including draft and returned reports

A "Departed" label next to the user's name indicates that they have left the company but still have outstanding tasks that must be completed by their delegates.

Remove a Delegate

To revoke a user's ability to act as your delegate, tap the X next to his or her name in the My Delegates list.



Approval Delegation

If you need to have another user temporarily approve expenses on your behalf, such while you are on vacation, tap your name in the upper right corner, then tap **SETTINGS**. In Delegate Settings, under My Approval Delegate, tap **+ADD APPROVAL DELEGATE**.

The screenshot shows the CHROMERIVER user interface. At the top, there is a dark header with a hamburger menu icon, the CHROMERIVER logo, a '+ New' button, and a user profile icon for 'Dan Humbert'. On the left side, there is a navigation menu with the following items: 'Dan Humbert Director', 'Personal Settings', 'Preferences Settings', 'Delegate Settings' (highlighted in blue), and 'Notification Settings'. The main content area is divided into two sections. The first section is titled 'My Delegates' and contains the text 'A "Delegate" is someone who has full access to your account.' followed by a '+ Add New Delegates' button. The second section is titled 'My Approval Delegate' and contains the text 'An "Approval Delegate" helps you with approvals during a specified time.' followed by a '+ Add Approval Delegate' button, which is highlighted with a red rectangular box.

You will be able to choose the approval delegate from a searchable list and set the Start and End dates for the authorization to approve expenses on your behalf. Although the list contains everyone, your organization's rules may trigger an error message if you select someone who is not authorized to be your delegate.

My Approval Delegate

An "Approval Delegate" helps you with approvals during a specified time.

Select a User

Abe Boss

Start Date

02/05/2018



End Date



February 2018

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	1	2	3
4	5	6	7	8	9	10

The delegate's name will appear with the range of dates during which he or she may approve expenses on your behalf. You may designate up to two approval delegates but only have one approval delegate working for you at a time. If you attempt to schedule a second delegate for a period that overlaps with that of your other approval delegate, you will receive an error message.

Chrome River will send an email to the approval delegate describing the routing changes that will occur during this period. All pre-approvals and expense reports assigned to you will automatically queue up for the delegate to approve. Regular approval emails will also be sent to the delegate.



Thu 9/17/2020 12:18 PM

expense-noreply-c5-qa@ca1.chromeriver.com

You have been assigned as an Approval Delegate

To Norma Reyna; myriaml2088-49058@chromewallet.com

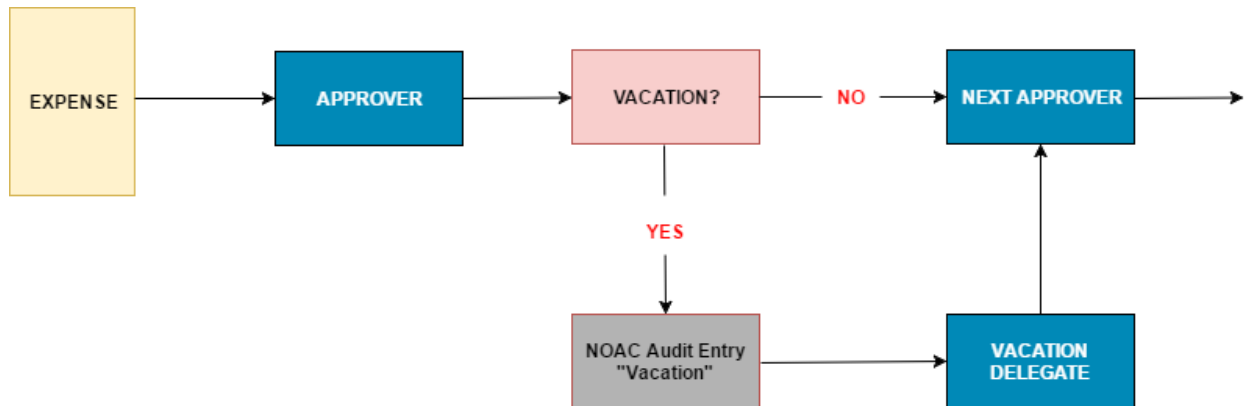
If there are problems with how this message is displayed, click here to view it in a web browser.

CAUTION: This email originated from outside South Texas College. Do not click links or open attachments unless you recognize the sender and know the content is safe.

NO FURTHER ACTION REQUIRED		Chrome River
Myriam Lopez has assigned you to be their approval delegate between the following dates:		
Start Date	09/15/2020	
End Date	09/20/2020	

Approval Delegation Routing

The routing process for expense reporting is in effect between the start and end dates you assigned to your approval delegate. These rules route all reports and pre-approvals from you to your approval delegate. These routing steps are recorded in the tracking center as a no-action assignment (NOAC) and reports are tagged with a label before moving to the delegate’s approval queue. The approval delegate can then approve or return items according to normal approval rules.

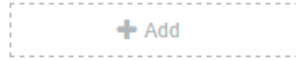


Remove Approval Delegate



At the end of the period you specified, the system will automatically deauthorize your approval delegate, and the approval process will return to default status. However, all reports and pre-approvals that were routed during that period remain in the approval delegate’s approval queue for further action.

If you return earlier than expected or simply wish to revoke your approval delegate's access, tap the red circle next to his or her name.

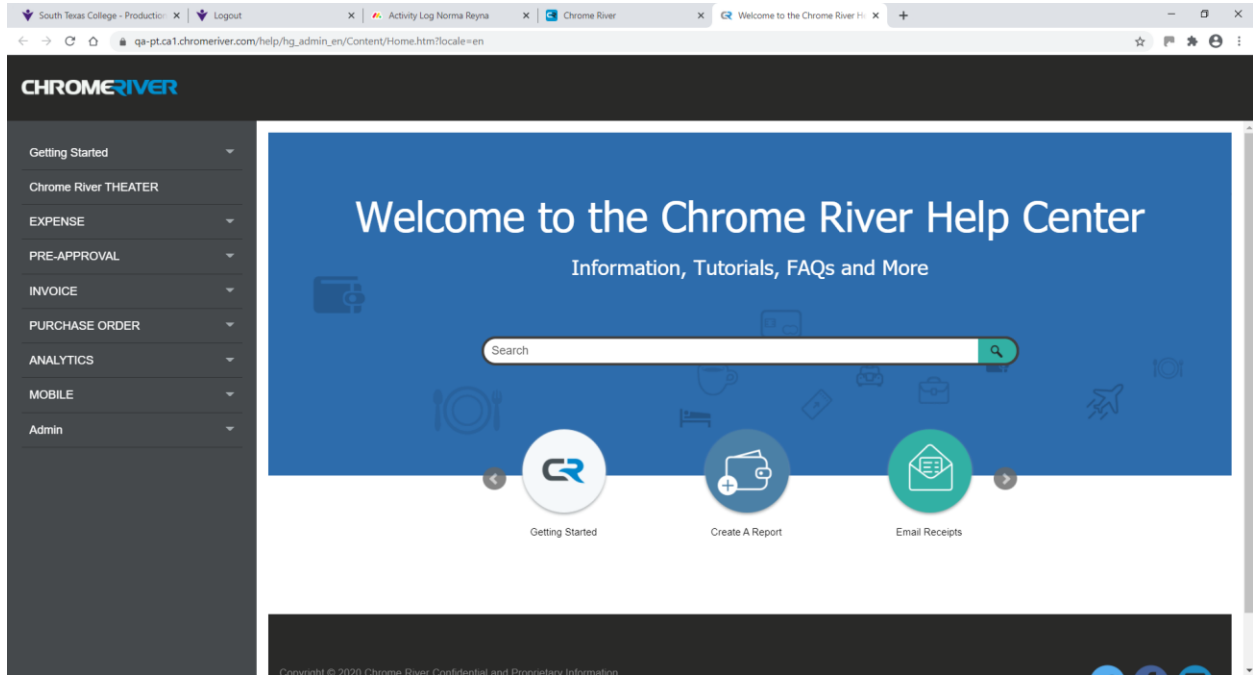
People who assist me



Approval Delegate: Helps you with approvals during a specified time.

	Anne Becknell (06/29/2015 - 07/02/2015) associate	
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Chrome River Help Center



Accessing the Help Center	Online
Help Center	Online
System requirements	Online
Chrome River Dashboard	Online
Navigation Bar	Online
Keyboard Navigation Bar	Online
Settings	Online
SNAP app for Android & iPhone	Online
Warning/Violation Messages	Online

Logging Out of Chrome River

To logout you will click your name on the upper right-hand corner of the screen and select Logout.

The screenshot displays the Chrome River web application interface. On the left, there are two main sections: 'EXPENSES' and 'PRE-APPROVAL'. The 'EXPENSES' section shows 0 Draft, 0 Returned, and 3 Submitted (Last 90 Days). The 'PRE-APPROVAL' section shows 0 Draft, 0 Returned, and 5 Submitted (Last 90 days). The top right corner shows the user's name 'Patricia Jackson' and a 'New' button. A dropdown menu is open, listing options: 'Patricia Jackson' (with last login info), 'Select Another User', 'Settings', 'System Administration', 'Help', and 'Logout'. A blue arrow points to the 'Logout' option. Below the menu, there is a 'CONTACT' section with links for 'Accounts Payable Support', 'Credit Card Support', and 'Accounts Payable Manager'. A 'NOTICES' section contains two reminders: 'Per Diem Rules' and 'Mobile device access'. A 'FEATURE HIGHLIGHT' section is titled 'Emailing receipts to your account'.