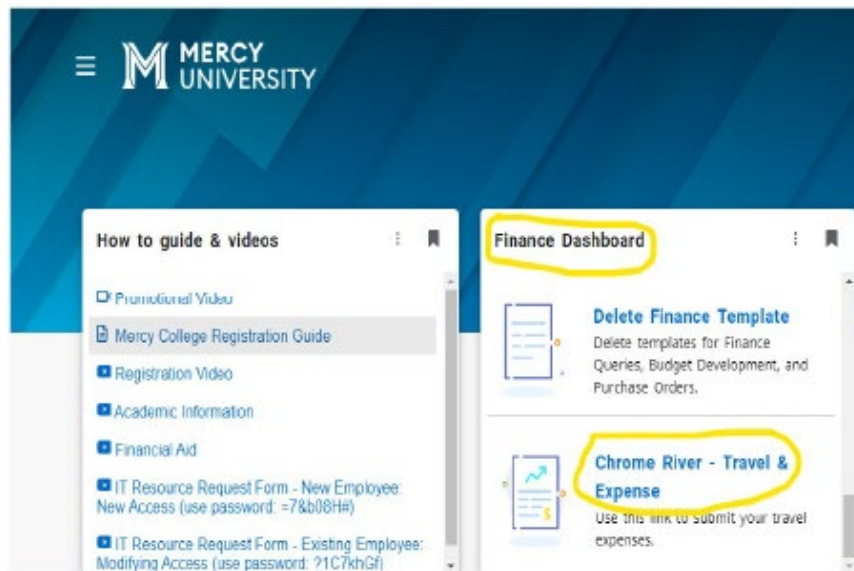




CHROME RIVER TRAINING GUIDE FOR MERCY UNIVERSITY

This document will show you our report types, how to set up an expense report, and how to reconcile your credit card statement. If you need more help, you can also find links on the Finance dashboard.

GO TO MERCY CONNECT, GO ON THE FINANCE DASHBOARD, AND SCROLL DOWN UNTIL YOU SEE CHROME RIVER – TRAVEL & EXPENSE





emburse

chromeriver

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Nancy Londono

Mercy University

eWallet

Unused Items

4 Credit Card Items

5 Receipts

VIEW ALL 9 UNUSED ITEMS

Expenses

Create

1

Draft

0

Returned

View All Submitted

Pre-Approval

Create

0

Draft

0

Returned

View All Submitted

Last Login on 01/04/2024 at 3:54 PM

MERCY UNIVERSITY

Hello Nancy, Welcome to your Expense and Invoice System.

CONTACT

Reimbursement and policy questions

policy@my.domain.com

Credit Card Support

ccsupport@my.domain.com

GENERAL

Company Policies

Travel & Expense

Training and Education

Chrome River Help Portal

EXPENSE REIMBURSEMENTS

Approve Expenses

Quick Start

Email Your Receipts

receipt@ca1.chromeriver.com

Add Receipt Images

How To

Creating a New Expense Report

Getting Started

Chrome River is accessed through Quick Links using your Single Sign On credentials.

Before you get started:

****Please make sure your receipts are loaded into Chrome River for easier creation of Expense Reports. You can email a photo of the receipt to receipt@ca1.chromeriver.com, or you can log into the Chrome River app and take a picture of the receipt or load from your photo album. You can find the Chrome River app in the App Store or Play Store. See [How to take a photo of a receipt](#) from your phone app.**

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Receipt Upload Requirements

Follow these requirements when uploading and attaching receipts in Chrome River.

Do not combine receipts from multiple transactions.

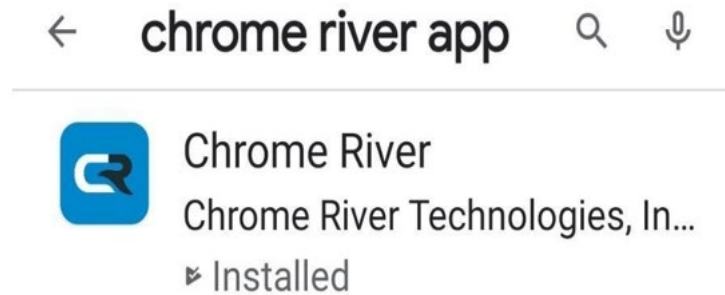
Each transaction must have its own separate receipt image or PDF attached to it.

- 1 Upload receipts separately**
Do not scan, photograph, or save receipts for different transactions together in one file.
- 2 Match each receipt to its transaction**
Attach the receipt only to the corresponding charge or out-of-pocket expense in Chrome River.
- 3 Keep one transaction together**
If a single receipt has multiple pages, those pages may be combined into one file for that transaction.
- 4 Check before submitting**
Confirm that every receipt is legible, complete, itemized, and attached to the correct expense.

Apple Store



Google Play Store



NOTE: The first time you log into the phone app or computer you will be asked to enter a verification number that will be sent to your Mercy University email address.

1. To create an Expense Report, you will select **+Create**.

The screenshot displays the Chrome River interface for Mercy University. On the left, a sidebar contains three main sections: 'eWallet' with 'Unused Items' (4 Credit Card Items, 5 Receipts), 'Expenses' (1 Draft, 0 Returned, 0 Submitted), and 'Pre-Approval' (0 Draft, 0 Returned, 0 Submitted). A red box highlights the '+ Create' button in the Expenses section. The main content area on the right features the Mercy University logo, a welcome message for Nancy Londono, and a grid of links under 'CONTACT', 'GENERAL', and 'EXPENSE REIMBURSEMENTS' categories.

emburse chrome river

Nancy Londono
Mercy University

eWallet

Unused Items

4 Credit Card Items

5 Receipts

VIEW ALL 9 UNUSED ITEMS

Expenses

+ Create

1 Draft

0 Returned

View All Submitted

Pre-Approval

+ Create

0 Draft

0 Returned

View All Submitted

MERCY UNIVERSITY

Hello Nancy, Welcome to your Expense and Invoice System.

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ccsupport@my.domain.com

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Company Policies
Travel & Expense

Training and Education
Chrome River Help Portal

EXPENSE REIMBURSEMENTS

- a. The Report Types are:
 - i. Corporate Card
 - ii. Travel and Expense
- b. Make sure to complete all sections of the Expense Report header. **Save.**



Cancel Save

 **Expenses For Nancy Londono**

Import from Pre-Approval
Optional

IMPORT PRE-APPROVAL

Report Name

N. Londono conference to Denver

Report Type

Travel and Expense ▾

-- Select --
Corporate Card
Travel and Expense

2. Add Expenses to your Expense Report. If the Expense is an out-of-pocket expense, you will use **Create New** and manually add in the amount that is reimbursable.

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Add Expenses

Create New

eWallet

All

Trips

Credit Card

Offline

Recycle Bin

eReceipts

Receipt Gallery

✈

TRAVEL AIRFARE & RELATED FEES ▾

🚗

TRAVEL GROUND TRANSPORTATION ▾

🏨

TRAVEL HOTEL / LODGING & RELATED ▾

🍴

TRAVEL/BUSINESS & ENTERTAINMENT MEALS ▾

🎁

AWARDS / GIFTS ▾

📄

OFFICE EXPENSES ▾

💰

DUES / FEES ▾

📜

PROFESSIONAL DEVELOPMENT ▾

📦

MISCELLANEOUS ▾

Keep in mind that the tiles with the down arrow have multiple expense types under the primary tile. Travel Airfare& Related Fees is an example below:

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Add Expenses

Create New

eWallet

All

Trips

Credit Card

TRAVEL AIRFARE & RELATED FEES

AIRFARE

TRAVEL GROUND TRANSPORTATION

BAGGAGE FEE

TRAVEL HOTEL / LODGING & RELATED

SEAT UPGRADE FEE

TRAVEL/BUSINESS & ENTERTAINMENT MEALS

TICKET CHANGE FEE

AWARDS / GIFTS

3. For the airfare expense type, you will enter the expense from the airline that are reimbursable to you.

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? ⚙️ Nancy Londono
Mercy University

Cancel Save

Airfare

Date

02/10/2024

Spent

402.19
USD

Business Purpose

Banner conference in Denver

Class

Economy/Coach

Merchant

Jet Blue

Please type the <CUSTOMER ALLOCATION DESCRIPTION> you would like to search for in the allocation box below. As you type, a drop down list of matching items will be displayed for selection

Allocation

100000-440010-41 Controller Controller's Office

+ Add Allocation
⋮ Presets
CREATE PRESET

Attachments (0)

Drag image here to upload

Add Attachments

4. Make sure to select an allocation for your Fund/Org. - by tapping on the allocation bar and typing the org code or name. All funds including grant funds have been loaded into the database. For Travel Expenses the tile is mapped to the Account Code. It is possible to split between other Fund/Org's by dollar amount.

Please type the <CUSTOMER ALLOCATION DESCRIPTION> you would like to search for in the allocation box below. As you type, a drop down list of matching items will be displayed for selection

Allocation

100000-440010-41 Controller Controller's Office

↺ 100000-440010-41 **Controller**
Controller's Office

5. When adding expenses, you may encounter a warning message. The message will indicate information that is needed to complete that expense. A response is required in order to continue.

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Images

EditDelete...

 Airfare

⚠ Corporate Card Policy #213

Per company policy, you need to use your corporate card for Airfare, Car Rental and Hotel. Please provide explanation why you did not use your corporate card.

Add response

Post

⚠ Expense over 90 days old #202

Expenses should be submitted in a timely manner. Please provide an explanation why an exception should be made.

Add response

Post

ⓘ Receipt required for this expense #201

A receipt is required for this expense. A credit card receipt by itself is not sufficient. Please provide an explanation why an exception should be made.

Add response

1 of 1

If the response is not entered, you will see the warning symbol on your expense report. The orange circle is an indication that a warning has not had a response. Until the response is saved on the expense, the Submit will remain grey and will not allow you to submit your expense report.

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←

Expenses For Nancy Londono

≡

+

N. Londono conference to Denver

0 Comments 0 Attachments

DATE	EXPENSE	SPENT	PAY ME	
Fri 02/10/2023	Airfare Jet Blue	402.19 USD	402.19	1

Expense Report 010035393395

Total Pay Me Amount 402.19 USD

Submit

Images

Edit Delete ...

Airfare

Corporate Card Policy #213

Per company policy, you need to use your corporate card for Airfare, Car Rental and Hotel. Please provide explanation why you did not use your corporate card.

RESPONSE

I don't have a Mercy University credit card

Expense over 90 days old #202

Expenses should be submitted in a timely manner. Please provide an explanation why an exception should be made.

RESPONSE

Expense date is for testing and training

Receipt required for this expense #201

A receipt is required for this expense. A credit card receipt by itself is not sufficient. Please provide an explanation why an exception should be made.

Add response

Post

1 of 1

After posting the required information and attaching the receipts the expense report will be ready to be submitted.

Nancy Londono Mercy University

←

Expenses For Nancy Londono

≡

+

N. Londono conference to Denver

0 Comments

15 Attachments

DATE

EXPENSE

SPENT

PAY ME

Fri 02/10/2023	Airfare Jet Blue	402.19 USD	402.19		✓
----------------	------------------	------------	--------	--	---

Expense Report

010035393395

Total Pay Me Amount

402.19 USD

Submit

PDF Images

Delete Edit

Expenses For Nancy Londono

Report Name

N. Londono conference to Denver

Report Type

Travel and Expense

Pre-Approval Expense Summary

Import from Pre-Approval

ADD PRE-APPROVAL REPORT

Comments (0)

Add Comment

Post

Attachments (15)

Drag image here to upload

Add Attachments

- For the Hotel expense type, you will enter the expenses from the hotel folio that are reimbursable to you in the Spent section. Enter all the information on the form. After complete, select Itemize.

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Cancel

Save

Itemize



Travel Hotel / Lodging & Related

Date

01/01/2024



Spent

934.11



USD

Business Purpose

Banner conference in Denver



Merchant

Hyatt Regency

Check In Date

01/01/2024



Check Out Date

01/03/2024



Please type the <CUSTOMER ALLOCATION DESCRIPTION> you would like to search for in the allocation box below. As you type, a drop down list of matching items will be displayed for selection

Allocation

100000-440010-41 Controller Controller's Office

The Itemize section will allow you to select the expense type within your Hotel folio bill.

7. Travel Ground Transportation may have additional features or requirements.

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Add Expenses

Create New

eWallet

- All
- Trips
 - Credit Card
 - Offline
- Recycle Bin

eReceipts

TRAVEL AIRFARE & RELATED FEES

TRAVEL GROUND TRANSPORTATION

TRAVEL HOTEL / LODGING & RELATED

TRAVEL/BUSINESS & ENTERTAINMENT MEALS

AWARDS / GIFTS

CAR RENTAL

CAR RENTAL FUEL

MILEAGE

PARKING

PUBLIC TRANSIT

TAXI / CAR SERVICE

TOLLS

TRAIN / RAIL

INTERCAMPUS MILEAGE

- a. Mileage: Calculate your mileage by using the Calculate Mileage link shown below.

? ⚙️ Nancy Londono ▼
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Cancel Save

 **Mileage**

Date	SINGLE DAY MULTI-DAY 01/06/2024 
Spent	0.00 USD
Business Purpose	Conference in Denver
Description	Attending Ellucian live conference for higher education administrators and technology leaders to share best practices focus on technology solutions that drive student success.
Rate	0.655
Miles	0.00 🚗 Calculate Mileage ⓘ
Deduction	None

Please type the <CUSTOMER ALLOCATION DESCRIPTION> you would like to search for in the allocation box below. As you type, a drop down list of matching items will be displayed for selection

Enter your beginning location and ending destination. Google maps will calculate the mileage for you. Make sure to enter all destinations for 1 full day. If there Once entered, click Save Trip.



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Cancel

Save Trip



555 Broadway, Dobbs Ferry, NY, USA

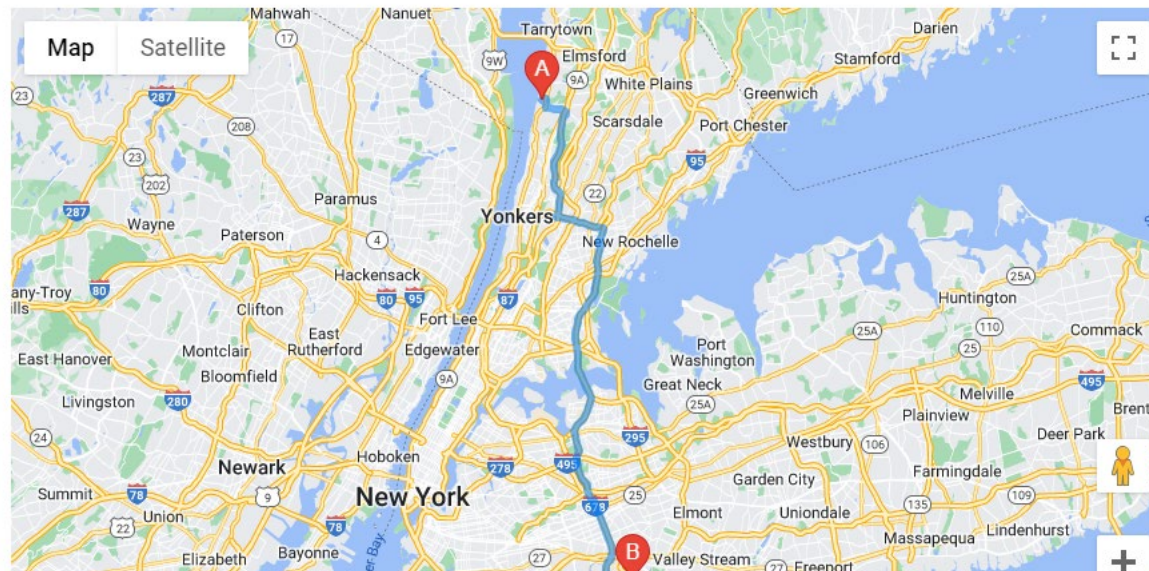


JFK Airport (JFK), Queens, NY, USA

Add Destination

Return to Start

32.57 Miles



The Mileage amount will be calculated based on your trip entry.

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Cancel

Save



Mileage

Date

SINGLE DAY

MULTI-DAY

01/06/2024



Spent

21.33

USD

Business Purpose

Conference in Denver

Description

From:: 555 Broadway, Dobbs Ferry, NY, USA
To:: JFK Airport (JFK), Queens, NY, USA

Rate

0.655

Miles

32.57

Calculate Mileage

Deduction

None

Please type the <CUSTOMER ALLOCATION DESCRIPTION> you would like to search for in the allocation box below. As you type, a drop down list of matching items will be displayed for selection

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- b. Intercampus Mileage: From the Route dropdown menu select the campuses you are visiting for the day (1way or RT – round trip) the mileage will be calculated automatically. No maps are required.

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Mercy University

CancelSave

 Intercampus Mileage

Date

SINGLE DAYMULTI-DAY

01/06/2024📅

Spent

0.00

USD

Business Purpose

-- Select --

555 Broadway / Bronx (1way)

555 Broadway / Bronx (RT)

555 Broadway / Manhattan (1 way)

555 Broadway / Manhattan (RT)

Bronx / Manhattan (1 way)

Bronx / Manhattan (RT)

Tarrytown / Bronx (1way)

Tarrytown / Bronx (RT)

Tarrytown / Manhattan (1 way)

Tarrytown / Manhattan (RT)

Description

Route

-- Select --

Miles

0.00

Rate
Optional

0.655



8. To view where your Expense Report is in the Approval process, first go to your Dashboard and select View All Submitted.

The screenshot shows the 'emburse chromeriver' dashboard. At the top, there's a navigation bar with a menu icon and the logo. Below this, there are three main sections: 'eWallet', 'Expenses', and 'Pre-Approval'. The 'eWallet' section shows 'Unused Items' with counts for '4 Credit Card Items' and '13 Receipts', and a link to 'VIEW ALL 17 UNUSED ITEMS'. The 'Expenses' section has a blue header with a '+ Create' button. Below the header, there are three columns: 'Draft' with a count of '1', 'Returned' with a count of '0', and 'View All Submitted' which is highlighted with a red box. The 'Pre-Approval' section also has a blue header with a '+ Create' button and three columns: 'Draft' (0), 'Returned' (0), and 'View All Submitted'.

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chromeriver

eWallet

Unused Items

4 Credit Card Items

13 Receipts

VIEW ALL 17 UNUSED ITEMS

Expenses + Create

1 Draft

0 Returned

View All Submitted

Pre-Approval + Create

0 Draft

0 Returned

View All Submitted

You can see all the reports that you have submitted within the last 90 days. From here you can select a report to view the tracking and you can recall if you need to make changes to your report. A PDF version is available if you choose to keep a hard copy on file.

emburse chromeriver

Submitted				
N. Londono conference to Denver 010035393395	01/06/2024	1,374.66 USD PENDING		
CC TEST 1 010034880480	12/05/2023	300.00 USD APPROVED		
test 3 010034822629	12/01/2023	141.22 USD PENDING		
test2 010034821674	12/01/2023	16.34 USD PENDING		
Test 1 - 11/14/23 010034532681	11/29/2023	2,039.64 USD PENDING		

To track where your expense report is in the approval process, select Tracking. The approvals are under Currently Assigned. If you select the button with the routing number, you will see who it is assigned to approve.

emburse chromeriver

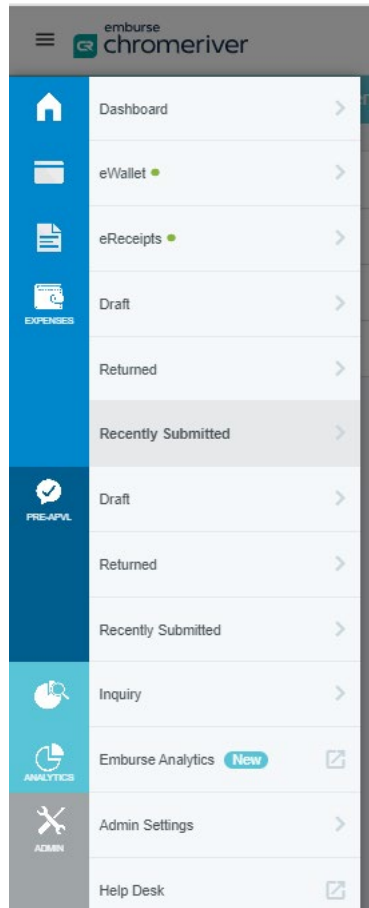
Nancy Londono Mercy University

Submitted			Open	PDF	Tracking	Recall
N. Londono conference to Denver 010035393395	01/06/2024	1,374.66 USD PENDING	N. Londono conference to Denver			

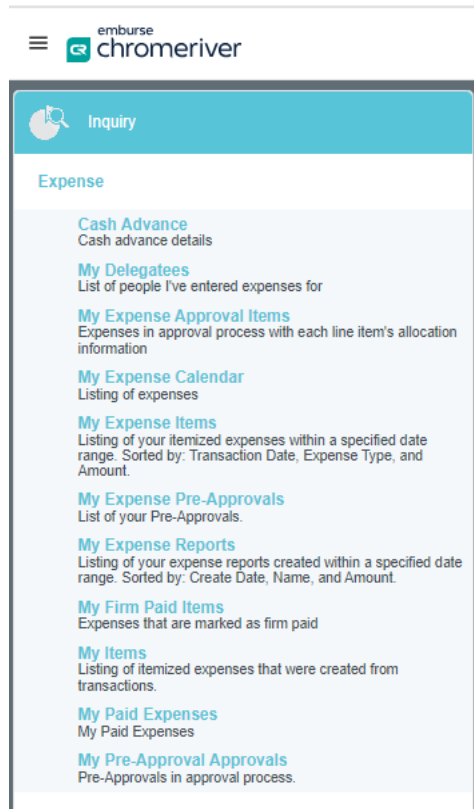
Tracking for N. Londono conference to Denver			
EXPENSE TYPE	AMOUNT (USD)	STATUS	CURRENTLY ASSIGNED
▶  Travel Hotel / Lodging & ...	934.11		
 Mileage	21.33	Pending Approval	Brett Carroll
 Intercampus Mileage	17.03	Pending Approval	Brett Carroll
 Airfare	402.19	Pending Approval	Brett Carroll

***The report will go to your supervisor, if the trip is over \$3,000 will get routed to the staff officer.*

- You will be able to run reports for expense reports you submit for yourself, or for someone else as their delegate. The top left menu will have your reports under the Inquiry tab.



The list of Reports available to you are under Expenses. These reports are items that pertain to you as the expense owner. For your monthly credit card reconciliation, you can run the report My Firm Paid Items. This report will identify your credit card charges and allow you to see which transactions have been applied to a report.



You can add receipts through many methods. Please see Chrome River help page for guidance on all options.

Creating a Credit Card Reconciliation Report

If you have credit card transactions to add to the report, you will find them under Credit Card in your eWallet.

1. In your eWallet open credit card charges.

eWallet

Unused Items

4 Credit Card Items

13 Receipts

[VIEW ALL 17 UNUSED ITEMS](#)

Check the CC expenses you need to reconcile, in this case I am selecting all (in the upper right-hand corner.) and click Add to Report:

Navigation: ? ⚙️ Nancy Londono Mercy University

Buttons: Delete Add to Report

Sort: [4] [✓]

transaction.feed.creditcardvisa.label.creditcardvisa Other 11/22/2023 GOLDEN DRAGON	207.17 USD
transaction.feed.creditcardvisa.label.creditcardvisa Other 11/27/2023 AUTODESK ADY	476.85 USD
transaction.feed.creditcardvisa.label.creditcardvisa Taxi / Car Service 11/30/2023 LYFT INCREASE TIP	5.00 USD
transaction.feed.creditcardvisa.label.creditcardvisa Car Rental 12/16/2023 HERTZ #0130611	52.52 USD



2. To reconcile your credit card transactions that are non-T&E related, Create a Credit Card Reconciliation Report Type. You have two options: One create a new Report or Add to an existing report.

Fill in all the information for the credit card reconciliation and **click save**:

A screenshot of a web application interface for managing expenses. At the top right, there is a user profile for 'Nancy Londono' with a dropdown arrow, a settings gear icon, and a help question mark icon. Below this is a light blue header bar with 'Cancel' and 'Save' buttons. The main section is titled 'Expenses For Nancy Londono' with a small icon to the left. Underneath, there is a section 'Import from Pre-Approval' with the word 'Optional' and a button labeled 'IMPORT PRE-APPROVAL'. Below that, the 'Report Name' field contains the text 'Credit Card Reconciliation January 2024'. The 'Report Type' field is a dropdown menu currently showing '-- Select --', with a list of options open below it: '-- Select --', 'Corporate Card' (highlighted in blue), and 'Travel and Expense'.

3. For each transaction, do the following:
 - a. Select the appropriate Expense Type.
 - i. If the icon next to the expense in your eWallet is a question mark, the system will automatically open the transaction and ask you to select the appropriate expense type. All credit card transactions require an attached receipt.

eWallet All Trips ● Credit Card ● Offline	Delete	Add to Report	✕
	Sort ▾		
	 transaction.feed.creditcardvisa.label.creditcardvisa Other 01/03/2024 ▶ WWW COSTCO COM ☐ 200.92 USD		

- ii. If the icon is not a question mark, that means the system has guessed the Expense Type. If the expense type is incorrect, change the expense type by clicking the icon at the top of the form. You can change the expense type at any time by clicking on this icon.



 Nancy Londono ▾
 Mercy University

Cancel Save


Select Valid Expense Type

 TRAVEL AIRFARE & RELATED FEES	 TRAVEL GROUND TRANSPORTATION	 TRAVEL HOTEL / LODGING & RELATED	 TRAVEL/BUSINESS & ENTERTAINMENT MEALS	 AWARDS / GIFTS	 OFFICE EXPENSES
 DUES / FEES	 PROFESSIONAL DEVELOPMENT	 MISCELLANEOUS			



There's a missing piece to the puzzle. Please select an Expense Type.



- iii. To help select the right expense type, the system will display a copy of the attached receipt (if the receipt was pre-merged) on the left. You can also look at the Downloaded Details which will show you the information received from TD Bank.

Downloaded Details

transaction.feed.creditcardvisa.label.creditcardvisa

Date

11/22/2023

Amount Spent

207.17 USD

Amount Original

207.17 USD

Transaction Name

GOLDEN DRAGON

Merchant

GOLDEN DRAGON

Details

Merchant: GOLDEN DRAGON, MCC: 5812, NY Location: DOBBS FERRY, NY , 10522-0000 , Transaction Number: 244138933270209695810350000000540, Statement Date: 11/30/2023, Posting Date: 11/24/2023

Attachments (0)

- b. Enter a valid Business Purpose.



Cancel

Save

**Business Meals**

Date

11/22/2023



Spent

207.17

USD

Business Purpose

Finance audit lunch

Merchant

GOLDEN DRAGON

Please type the <CUSTOMER ALLOCATION DESCRIPTION> you would like to search for in the allocation box below. As you type, a drop down list of matching items will be displayed for selection

Allocation

100000-440010-41 Controller Controller's Office



Add Allocation



Presets

CREATE PRESET

- c. Use the Guest Selector to add required attendee details for this item:
- Add internal guests are people within your organization.
 - Add external guests are people outside your organization.

?
⚙️
Nancy Londono
Mercy University

Cancel
Save

+ Add Allocation
≡ Presets
CREATE PRESET

Guests (7) ⓘ

Internal

stiv

Upload CSV

Internal

×

Keri Stivale
 Senior Accountant
 Mercy University
 Mercy University

Internal

×

Anne Marie Curreri
 Accounts Payable Manager
 Mercy University

14.28 %

29.59

Internal

×

Narda Romero
 Controller
 Mercy University

14.28 %

29.59

Internal

×

Prema Aier
 Assistant Controller
 Mercy University

14.28 %

29.59

Internal

×

Brett Carroll
 CFO & Vice President
 Mercy University

14.28 %

29.59

Internal

×

Judith Abe
 Staff Accountant
 Mercy University

14.28 %

29.59

Internal

×

Jennifer Addison
 Director, Payroll
 Mercy University

14.28 %

29.59

- d. Upload the receipt. You can also add any additional Attachments. If you pre-uploaded your receipt, you will see the receipts here.

Attachments (0)
⌵

Drag image here to upload

Add Attachments

From Receipt Gallery

Upload Attachments



- e. Once you have completed adding all expenses to your expense report, ensure that all transactions have a green check mark next to them and click the “Submit” button at the bottom.

A screenshot of a 'Submit Confirmation' dialog box. The dialog has a green header bar with the text 'Submit Confirmation'. Below the header, on a yellow background, is the text: 'I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.' At the bottom of the dialog, there are four buttons: a blue 'PDF' button with a dropdown arrow, a white 'Cancel' button, a blue 'Pre-Approval' button, and a green 'Submit' button. In the top right corner of the page, above the dialog, are icons for help (question mark) and settings (gear), and a user profile for 'Nancy Londono' with a dropdown arrow and 'Mercy University' below it.

[Other Resources](#)

On the Chromeriver log on page there are links for creating and submitting an expense report as well as approving expense reports.