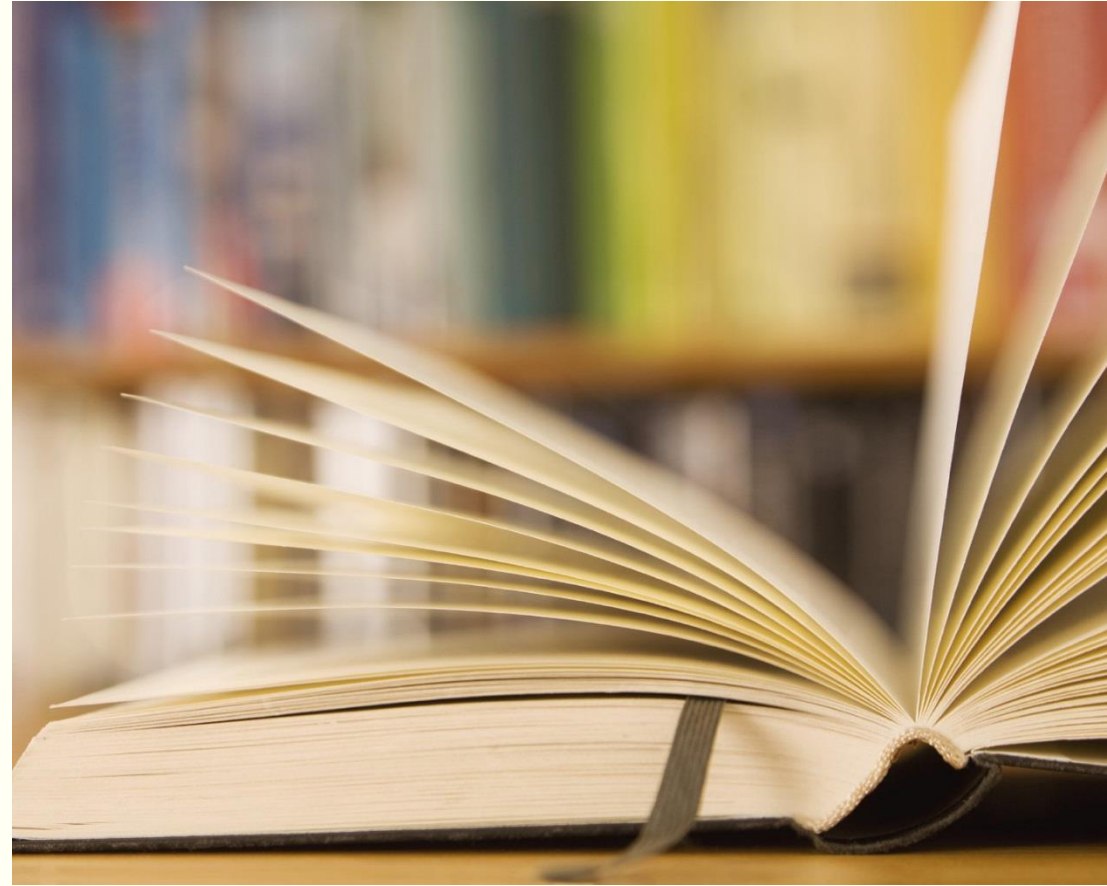




# CHROME RIVER PREPARE TO LAUNCH

Laura Putz  
Joyce Chavez  
Travis Barnette  
August 25, 2016



# Department Considerations

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- Roles and Responsibilities
  - Student/Non-employee Reimbursement
  - Delegates
- Pre Approval for Travel
- Approvals
- Staff Support
- Executive Reporting

# Department Considerations

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- Report Naming Conventions
- Establish PCard reconciliation expectations
- Department Champions
- Training
  - Departmental
  - EOD
  - Job Aids
  - Reference Guides

# Log in

The screenshot shows a mobile browser interface on an iPad. The address bar displays the URL `https://app.chromeriver.com/login`. The page features the Chrome River logo at the top. Below the logo is a login form with three input fields: 'Username' (containing 'lputz'), 'Password', and 'URL' (containing 'www.unm.edu'). Each field has a 'Forgot?' link. A 'Login' button is positioned below the fields, along with a checked 'Remember me' checkbox. To the right of the login form is a 'DID YOU KNOW?' section with a question mark icon, containing text about bookmarking the page for quick access and keyboard shortcuts: 'Ctrl + D (Windows)' and 'Command + D (Mac)'. An illustration of a spiral notebook with a bookmark is also present. At the bottom of the page, a copyright notice reads: '© Copyright 2016 Chrome River Technologies, Inc. All rights reserved. [Privacy Policy](#)'.

9:31 AM 100%

https://app.chromeriver.com/login

## CHROMERIVER

### Login

lputz [Forgot?](#)

Password [Forgot?](#)

www.unm.edu [Forgot?](#)

Login  Remember me

**DID YOU KNOW?** ?

You can bookmark this page for quick access.

Ctrl + D (Windows)  
Command + D (Mac)

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# Dashboard

iPad 2:21 PM 91%

Chrome River Technologies, Inc.

**CHROMERIVER** + New Laura Putz

**APPROVALS**

**Approvals Needed**  
15 Expense Reports  
0 Pre-Approvals

**EXPENSES**

10 Draft	0 Returned	52 Submitted Last 90 Days
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**PRE-APPROVAL**

2 Draft	0 Returned	0 Submitted Last 90 days
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**NEW**

- New Expense Report
- New Pre-Approval Report

**DO NOT ATTACH SENSITIVE INFORMATION**  
Please make sure to keep all original receipts until your reimbursement is received

**C O N T A C T**

**For expense and invoice assistance, please contact:**

Accounts Payable	<a href="#">Accounts Payable</a>
Contract & Grant Acctg, HSC	<a href="#">C&amp;G, HSC</a>
Contract & Grant Acctg, Main	<a href="#">C&amp;G, Main</a>
Unrestricted Accounting, HSC	<a href="#">UA, HSC</a>
Unrestricted Accounting, Main	<a href="#">UA, Main</a>
PCard	<a href="#">Peggy Sedillo</a>

# Expense Report

The screenshot shows the Chromeriver Expense Report interface. At the top, the Chromeriver logo is on the left, and a '+ New' button and a user profile icon for 'Laura Putz' are on the right. Below the header, there is a blue navigation bar with a back arrow, 'Expenses For Laura Putz', a list icon, and a '+' icon. The main content area is titled 'Test' and shows '0 Comments' and '0 Attachments'. Below this is a table with columns for DATE, EXPENSE, SPENT, and PAY ME. The table is currently empty, with a message: 'Click "+" to add your first item.' To the right of the table is a sidebar with sections: 'Add Expenses' (with a 'Create New' button), 'E-Wallet' (with options: All, Credit Card, Offline, Recycle Bin), and 'E-Receipts' (with a 'Receipt Gallery' option). The main area to the right of the sidebar contains a grid of expense category buttons: AIR TRAVEL, GROUND TRAVEL, HOTEL, MEALS, CONFERENCE / REGISTRATION FEES, EMPLOYEE OTHER, and P-CARD.

**CHROMERIVER** + New Laura Putz

Expenses For Laura Putz

Test

0 Comments 0 Attachments

DATE	EXPENSE	SPENT	PAY ME
Click "+" to add your first item.			

**Add Expenses**

Create New

**E-Wallet**

- All
- Credit Card
- Offline
- Recycle Bin

**E-Receipts**

- Receipt Gallery

AIR TRAVEL

GROUND TRAVEL

HOTEL

MEALS

CONFERENCE / REGISTRATION FEES

EMPLOYEE OTHER

P-CARD

# Sub Menus

















Mobile application interface showing a sidebar menu and a main grid of sub-menus.

**Header:** + New | Laura Putz





**Sidebar Menu:**

- Add Expenses**
  - Create New
- E-Wallet**
  - All
  - Credit Card
  - Offline
  - Recycle Bin
- E-Receipts**
  - Receipt Gallery

**Main Grid of Sub-Menus:**

 AIR TRAVEL	 GROUND TRAVEL	 HOTEL
 CAR RENTAL	 CAR RENTAL FUEL	 CAR RENTAL OTHER
 MILEAGE	 MILEAGE OVERRIDE	 PARKING
 PUBLIC TRANSIT	 TAXI/SHUTTLE	 UNM VEHICLE FUEL
 GROUND TRANS - OTHER		
		

# Expense line item data

		+ New		Laura Putz	
		Cancel		Save	
		Taxi/Shuttle			
Post Date					
Date	08/07/2016				
Spent			0.00		USD
Description	<input type="text"/>				
Taxi Trip Type	-- Select --				
Feed Transaction ID	<input type="text"/>				
<b>Banner Index</b>					
<input type="text" value="Search for Banner Index"/>					



# Per Diem Adjustments

				X
DATE	LOCATION	AMOUNT		
X Fri, 08/05/2016	Portland, Oregon (OR), United States	48.00 USD	>	
X Sat, 08/06/2016	Portland, Oregon (OR), United States	36.00 USD	>	
<b>Reductions</b>				
<input type="checkbox"/> Breakfast	<input type="checkbox"/> Travel Day			
<input type="checkbox"/> Lunch	<input type="checkbox"/> Additional Reductions			
<input checked="" type="checkbox"/> Dinner				
X Sun, 08/07/2016	Portland, Oregon (OR), United States	64.00 USD	>	
X Mon, 08/08/2016	Portland, Oregon (OR), United States	48.00 USD	>	

Clear All Add to Report

# P-Card Reconciliation

**Add Expenses**

Create New

E-Wallet




- All
- Credit Card
- Offline
- Recycle Bin

E-Receipts

- Receipt Gallery

Delete Add

Sort 1

	<b>Unm Visa</b> P-Card 06/04/2016 ▶ 4219-PITNEY BOWES PI	<input checked="" type="checkbox"/> <b>1,149.95</b> USD
	<b>Unm Visa</b> P-Card 06/09/2016 ▶ 0020-PRUDENTIAL OVERALL SUPPLY	<input type="checkbox"/> <b>934.87</b> USD
	<b>Unm Visa</b> Other 06/21/2016 ▶ 1259-CG PRINTERS	<input type="checkbox"/> <b>857.50</b> USD

AIR TRAVEL

GROUND TRAVEL

HOTEL

MEALS

CONFERENCE / REGISTRATION FEES

EMPLOYEE OTHER

P-CARD

# Receipt Attachments

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Attachments (0)



Browse File to Attach

# Approvals

CHROMERIVER			
Approvals Needed			
Expense Reports			
REPORT OWNER	DATE	AMOUNT	
Putz, Laura Testing 8/2	08/02/2016	94.33 USD	⚠
Shoebbotham, Terry Travel Expense Reimbursement	08/03/2016	33.00 USD	✓
Marr, Kirsten Cruickshank, A. New Hire Moving 2	08/09/2016	1,492.66 USD	⚠
Putz, Laura retract correction	08/11/2016	1,342.99 USD	⚠
Galloway, Jason Test Student Payments	08/17/2016	452.50 USD	⚠
Shoebbotham, Terry Expense Test-8/17/16-Shoe	08/17/2016	1,935.00 USD	✓
Black, Lorrie testing CR connectivity	08/24/2016	123.00 USD	✓

# Prepare to Launch

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October 1, 2016

The logo for "CHROME RIVER" is displayed on a dark blue rectangular background. The word "CHROME" is in white, and "RIVER" is in a light blue color. The letter "R" in "RIVER" is stylized with a curved, river-like shape that extends from the bottom of the letter and curves back up to the top of the letter.

**CHROME RIVER**

<http://www.unm.edu/~fssc/chrome-river.html>