Chrome River
*Expense Module*

LIVE MAY 20, 2024

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Training Agenda

- Chrome River Module Timeline
- Chrome River Accounts and Allocations
- Stuff we want you to know
- Questions before moving to demo
- Demo! Let’s log in and take a look
- Questions
- Training resources
Go Live Timeline – Past and Future

Phase 1 – Pcard allocations and documentation Completed Fall 2023

Phase 3 – Invoice module – Fall 2024

- Payments to Vendors
- Payments to individuals without SDSUid
- Payments to individuals with Chrome River accounts for payments that are not reimbursements.
Chrome River Go Live Timeline

- Phase 2 – Soft launch of Expense Module May 20, 2024
  - Replaces the disbursement form with Chrome River expense reports
  - Miscellaneous reimbursements to individuals with Chrome River accounts
  - Miscellaneous and travel advances/claims

- MyRF Document Processing available until Phase 3 completion
  - Request advances in Chrome River only
  - Submit requests in either doc processing or Chrome River – not both
Chrome River Accounts

MyRF used to provision/deprovision accounts
Chrome River uses SSO with SDSU log in credentials

Chrome River account set up: MyRF -> Fund Management -> User Security
- Chrome River Account – Provides user with a Chrome River account and provides access to allocate reimbursements and invoices to the orgs specified. Approval by PI/Fund Manager is required.
Chrome River Allocations

What funds are available in my dropdown selection?

- Any fund that a user has access to in MyRF
- Funds where a user is a PI or has signature authority
- Access to charge on Pcard
- Employee on fund
- Chrome River only account
Routing and Delegates

- Expense reports are automatically routed based on fund(s) used.
- Approvers are emailed when there is a report to approve
  - Can approve via email or can log in to Chrome River for review/approval
- Routing progress can be tracked in Chrome River

- Users can set up delegates in Chrome River
  - Delegate can prepare expense reports and submit to expense owner for approval
  - Delegate cannot approve on behalf of the expense owner
  - Delegate must have a Chrome River account
Electronic Receipt Management

- Multiple ways to send receipts to CR
  - Snap and Send via Chrome River SNAP app
    - Download available in App stores
  - Email forward directly to account
  - Drag and Drop!
- No need to keep paper receipts
- Expense reports available in MyRF
Chrome River Resources

- Foundation.sdsu.edu -> Departments -> AP -> Chrome River
- General information
- Links to written and video training materials
- Email questions to sdsurfchromeriver@sdsu.edu
The Moment You’ve Been Waiting For!

Welcome to
Expenses made easy