



Chrome River User Manual

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UPLOAD AND ATTACH RECEIPTS

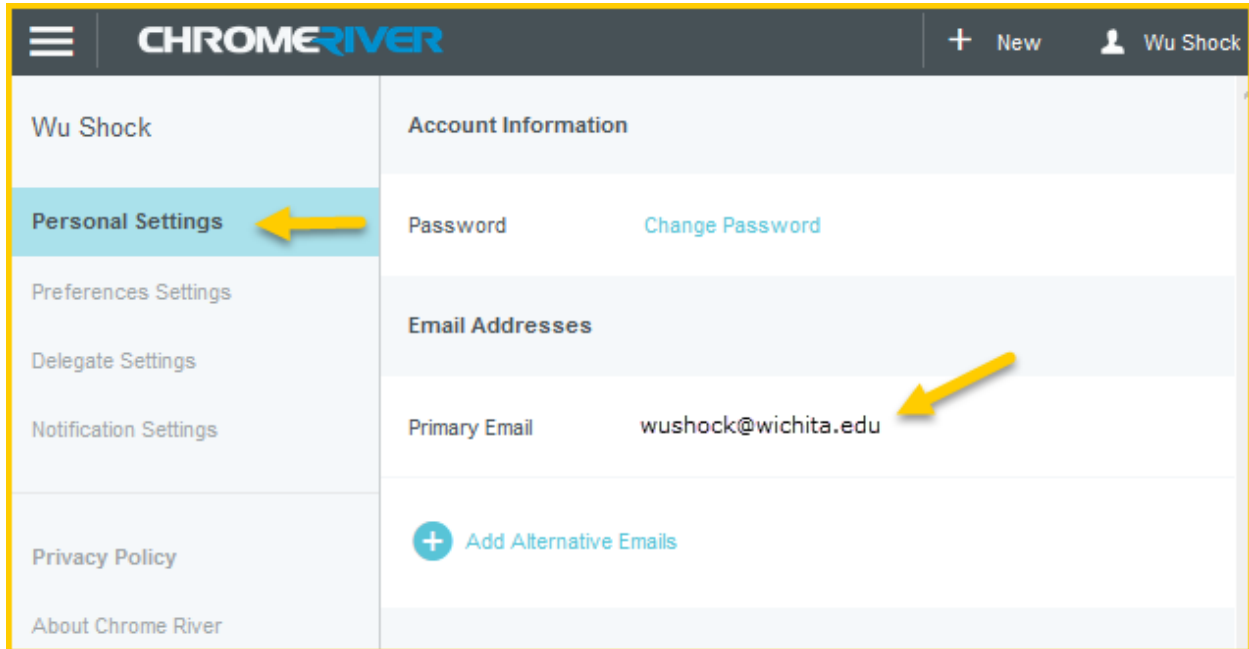
There are multiple ways to attach receipts and images in Chrome River. Receipts can be emailed, scanned or faxed and uploaded directly to the report header, to an expense, or to the **Receipt Gallery**. From the **Receipt Gallery**, images can be dragged and attached to line items within the report. Only JPG, PDF, PNG, and TIFF files can be accepted when an image is attached via the Chrome River SNAP app, and no file may be greater than 10 MB. Images attached via email, scanning, or faxing may not exceed a combined total of 100 MB. See the **CR0002 Introduction to Receipts** document, **Receipt Image Specs** section for complete details.

Attach Via Email

Before emailing a receipt or image, you will want to make sure that the email address you are using is associated to your Chrome River account. You can check your email information by going to your name located in the upper right corner of the Navigation Bar, selecting **Settings** and then **Personal Settings**. You will see your wichita.edu email address listed. If you would like to add a personal email so you can upload images from other accounts or from your mobile devices, you will need to click **Add Alternative Emails**. Please note that an email address can only be associated to one account.



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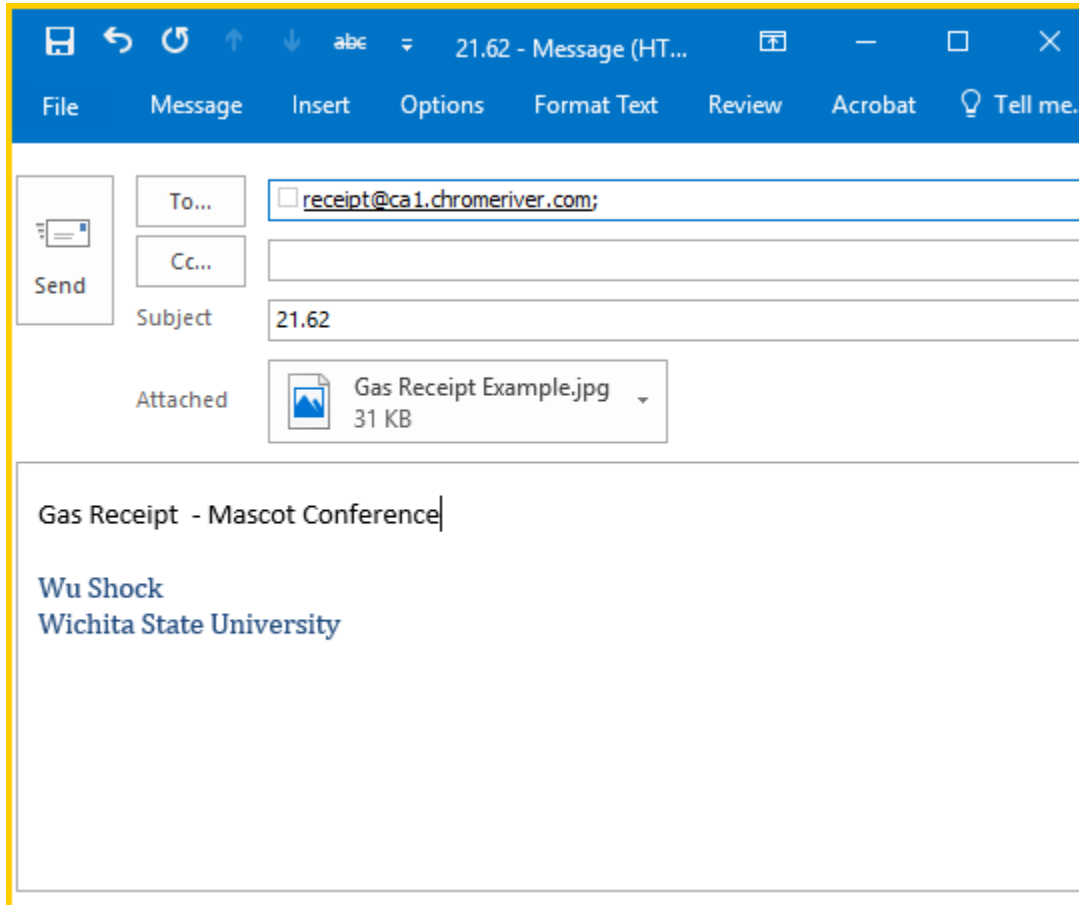


EMAIL TO RECEIPT GALLERY:

To email a receipt to your **Receipt Gallery**, simply attach the images to an email message, include the amount of the expense in the subject line, and email from an email address associated with your Chrome River account device to receipt@ca1.chromeriver.com. You can also take a photo with your mobile device and email directly from your phone as long as you've set up the appropriate email address in your **Personal Settings** in Chrome River.



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The images will appear in the **Receipt Gallery** and/or the **Offline** section of the **eWallet**.

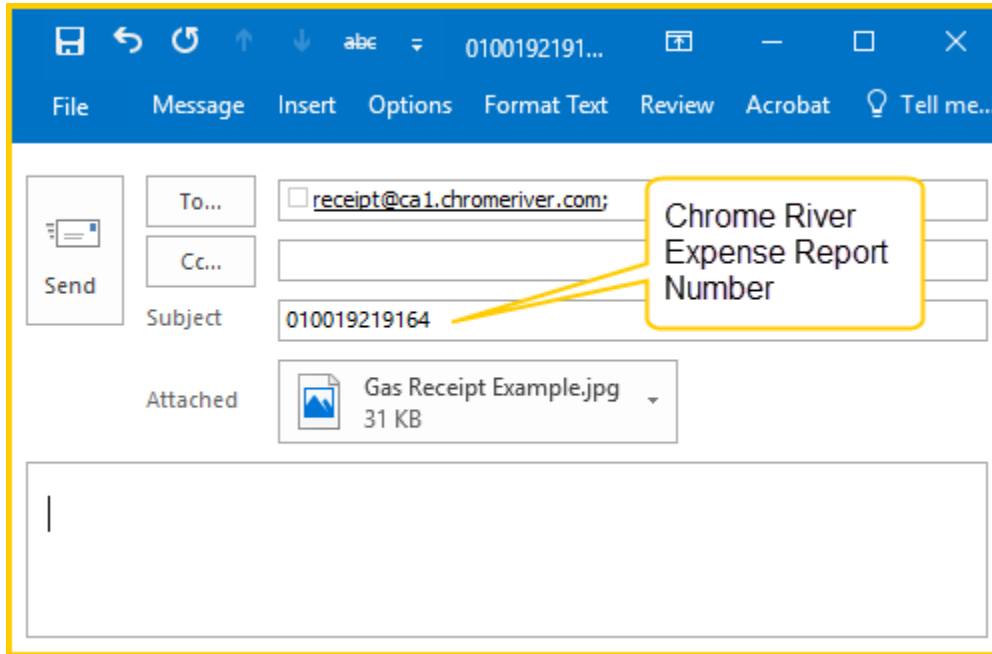
Each image will appear as its own item, complete with the corresponding information about the expense. If you attach a multipage PDF containing only images, each image will be created as a separate expense item. If the multipage PDF contains text, a single item will be created.

EMAIL TO EXPENSE REPORT:

If you know the ID of the expense report to which you'd like to attach an image, enter the Report ID into the subject line of an email you've composed (instead of the currency, as shown in the **Email to Receipt Gallery** example, above). Remove everything from the body of the email, including any email signatures. Send the email to receipt@ca1.chromeriver.com.



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This method works even if you have multiple images attached to the email you're sending, as long as they all apply to the same expense report. The total combined size of all images may not exceed 100 MB.

Images will be attached to the report header.

See the **Receipt Transactions and Optical Character Recognition** section below for more information on emailing receipts to create transactions.

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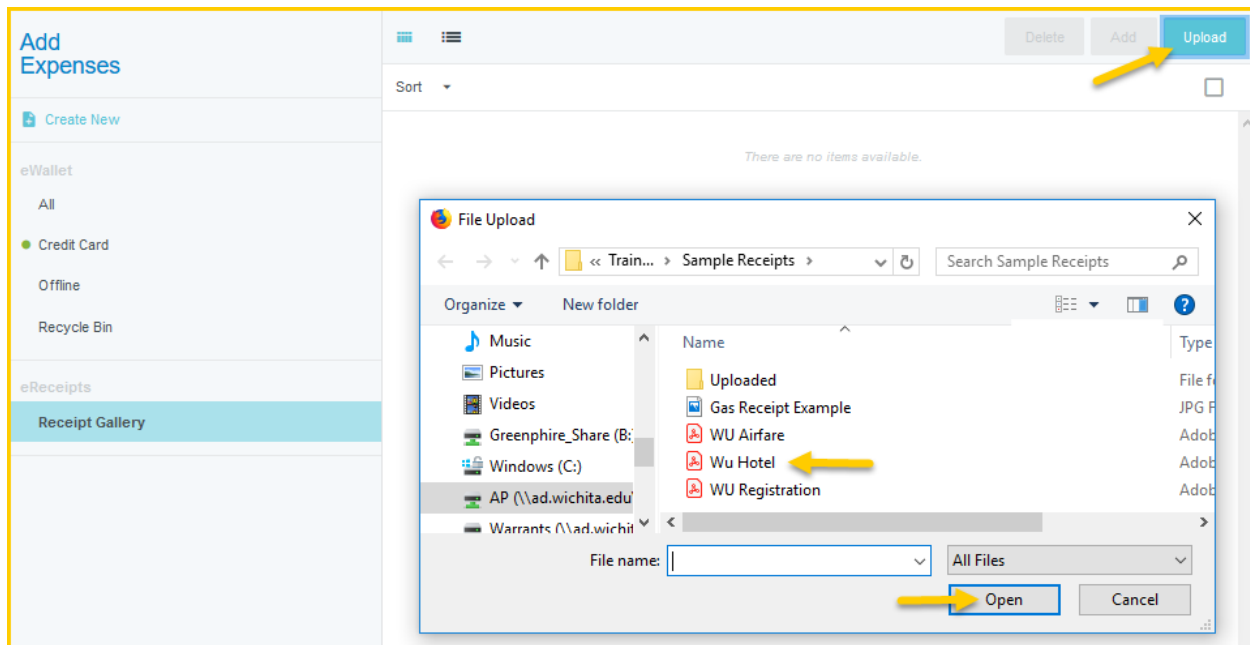


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Attach Via Scanning

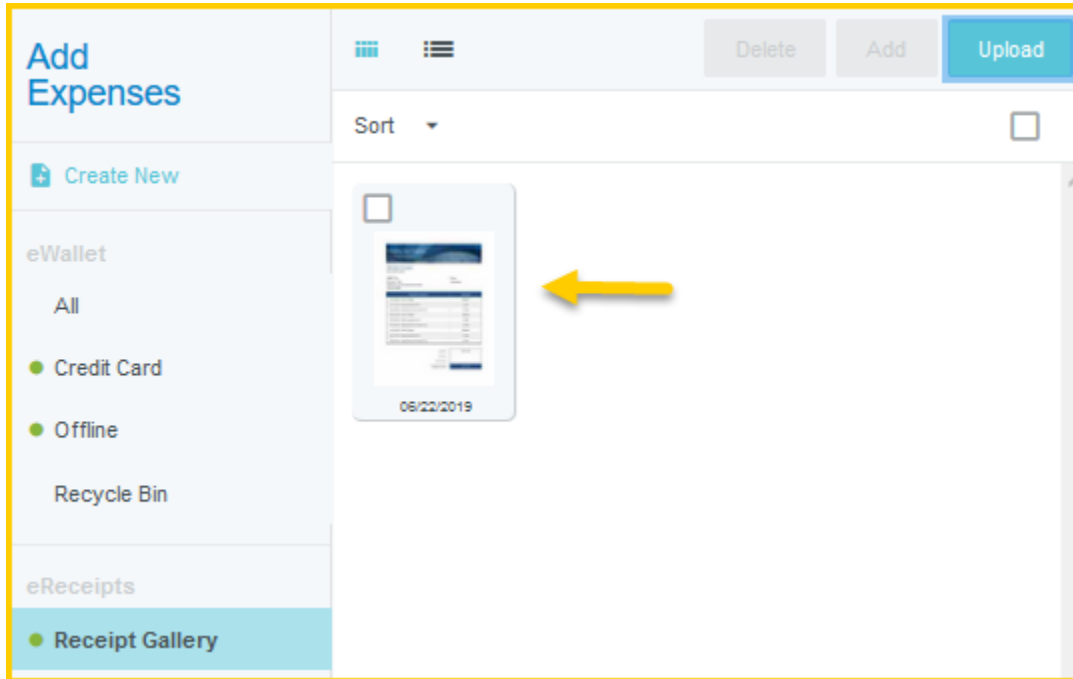
SCAN AND ATTACH TO RECEIPT GALLERY:

You may wish to scan receipts or images directly to your computer. Once you have scanned, you can upload to the **Receipt Gallery** by going into your Chrome River **eReceipts**, choosing **Receipt Gallery**, and clicking the **Upload** button. The receipt image will appear in your **Receipt Gallery** with the date you uploaded the expense. See more detail below in the **Upload to the Receipt Gallery** section.



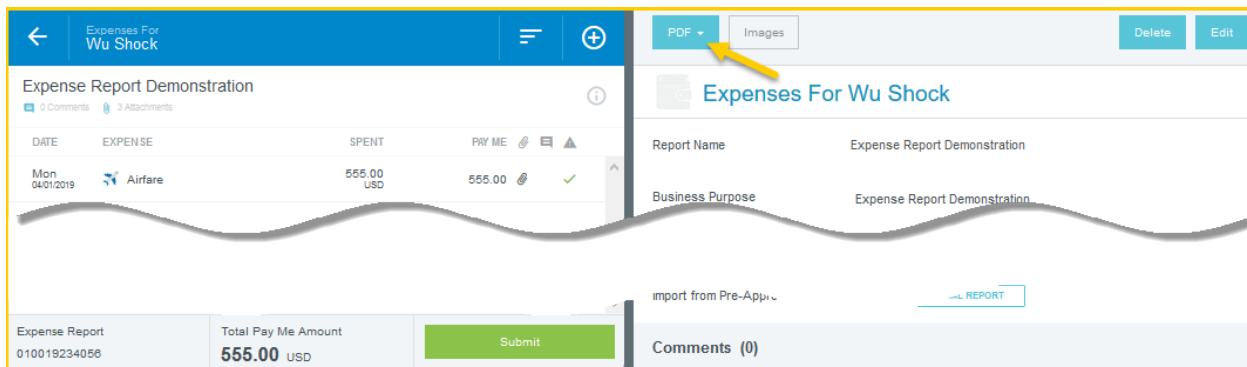


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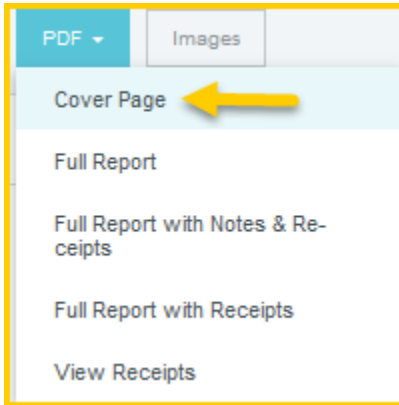
TO EXPENSE REPORT:

To scan to a specific report, click the PDF button in the preview of the expense report you want to attach images to. When you select **Cover Page**, the page will open in a new window so that you can print it or save it. Scan the cover page with the images you wish to attach to expense@ca1.chromeriver.com - the unique barcode will direct it to the correct report.






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Expense Report Report ID: 0100-1923-4056

Report Name	Expense Report Demonstration	
Expense Owner	Wu Shock	
Expense Owner ID	Wushock	
Created By	Wu Shock	
Date	Jun 22, 2019	
To Be Paid In	USD	

Please place this cover sheet in front of hardcopy receipt pages and then scan or fax to:
 Email: expense@ca1.chromeriver.com Fax: (888) 323-1591

Financial Summary

	Amount (USD)
Total Expenses Reported	555.00
Amount Due Expense Owner	555.00

Expense Summary

Expense Type	Amount (USD)
Airfare	555.00
Total	555.00

Allocation Summary

Allocations Charged	Amount (USD)
A0003-101614-2045 A0003: GU State General Fund 101614: Regents Press of	555.00
Total	555.00

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Attach Via Faxing – only available for report header attachment

FAX TO EXPENSE REPORT:

Similar to the method for attaching a scanned image directly to a specific report, you will need to print the PDF cover page of the report in order to get the unique barcode for the report (see instructions above). The cover page and images will then need to be faxed to (888) 323-1591. Faxed receipts can only be attached to a specific report.

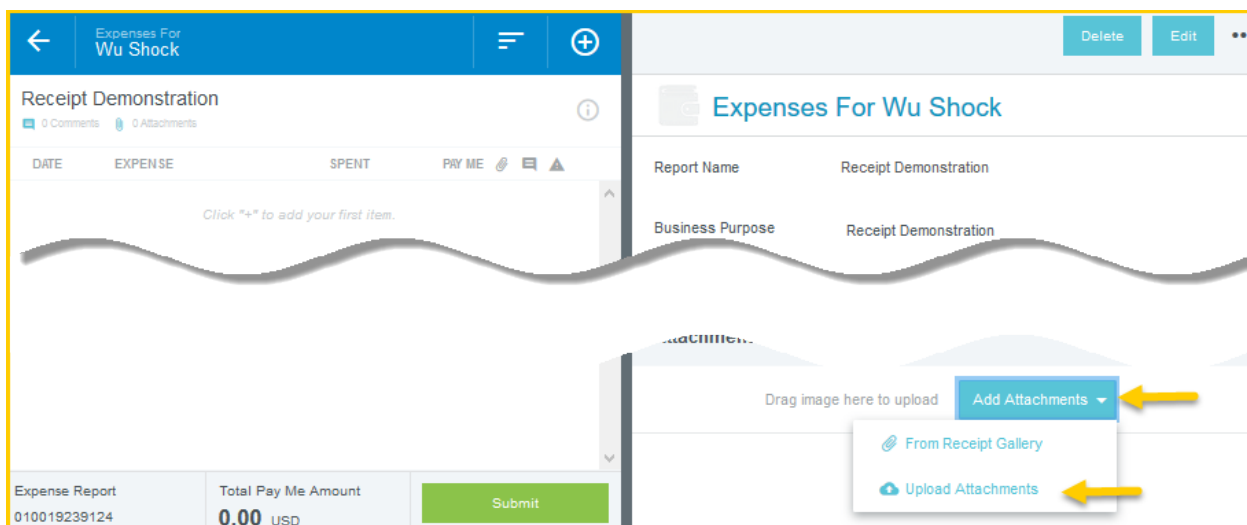
NOTE: Any images already attached to the report will be overwritten by the images you send in.

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Uploading Images

UPLOAD TO THE REPORT HEADER:

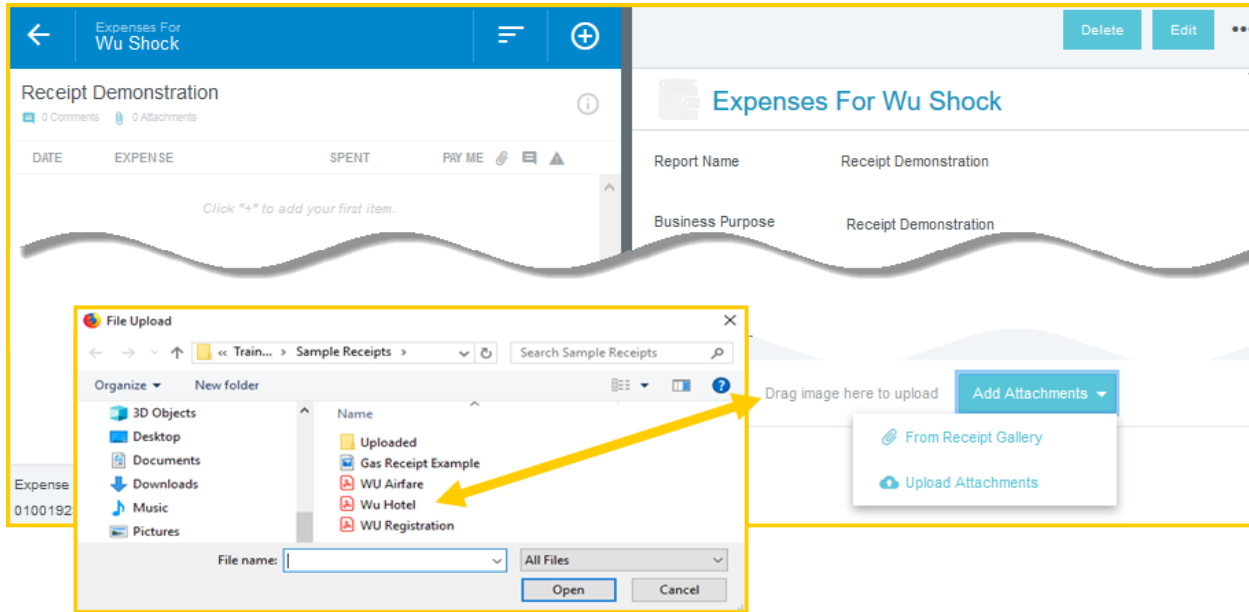
Once you have entered the header information for a new expense, click the **Add Attachments** button in the lower right corner to browse for an image on your device. This will attach a receipt to the report but does not tie it to a specific expense line. You will have the opportunity to assign this to a line item later.



You may also choose a receipt in a file first and drag it to the **Drag image here to upload** section.



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UPLOADING DIRECTLY TO A LINE ITEM:

Receipts can be uploaded directly to a line item if you have the image already available on your computer or device. After you have created a line item, you will click on the **Add Attachments** button in the lower right corner of the expense detail. This can be done before the expense is saved or after.



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Cancel Save

Airfare

Date 03/12/2019

Spent 555.00 USD

Business Purpose Receipt Demonstration

Attachments (0)

Drag image here to upload Add Attachments

- From Receipt Gallery
- Upload Attachments

Once the image is attached, it will appear on the bottom of the expense detail when the line is selected. You can also use the Drag and Drop method shown in the **Upload to the Report Header** section above.



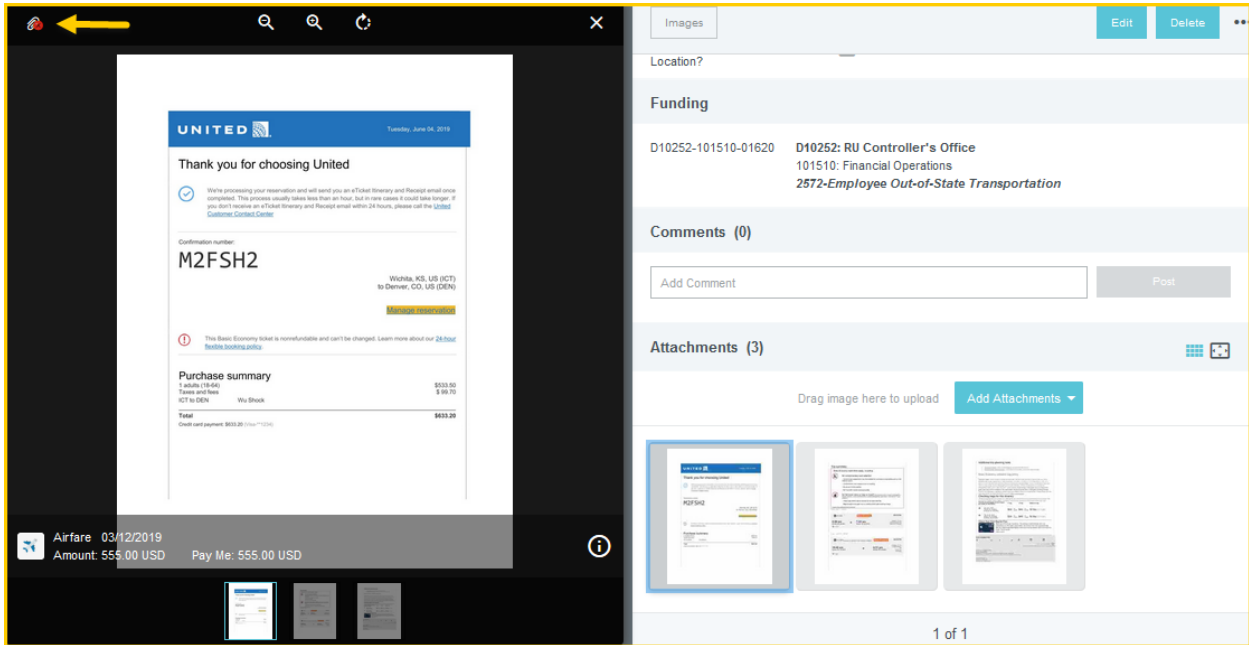
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The screenshot shows a web form for an 'Airfare' expense. At the top right are 'Cancel' and 'Save' buttons. The form has a header with an airplane icon and the word 'Airfare'. Below this are three main input sections: 'Date' with a calendar icon showing '03/12/2019', 'Spent' with a calculator icon showing '555.00' and 'USD', and 'Business Purpose' with a text box containing 'Receipt Demonstration'. A decorative wavy line separates this from the 'Attachments (3)' section. This section features a 'Drag image here to upload' label, an 'Add Attachments' button, and three thumbnail images of receipts. A yellow arrow points to the rightmost thumbnail.

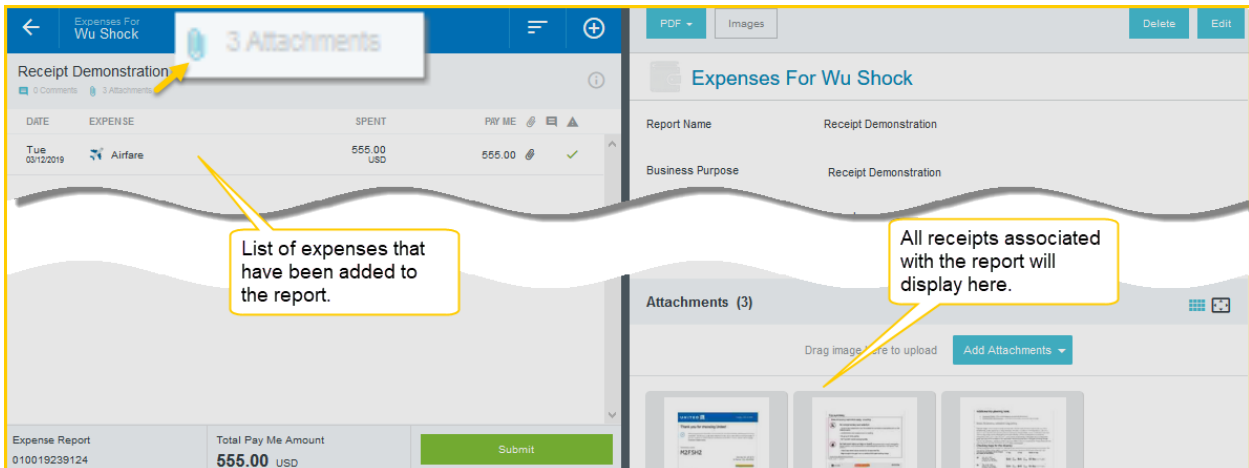
You will also be able to view a larger image of the receipt by clicking the thumbnail image. The receipt will be visible on the left side of the screen. Note, if you would like to detach the receipt from this expense, you can click on the paperclip in the upper left corner. The receipt will go to the **Receipt Gallery** in your **eWallet**.



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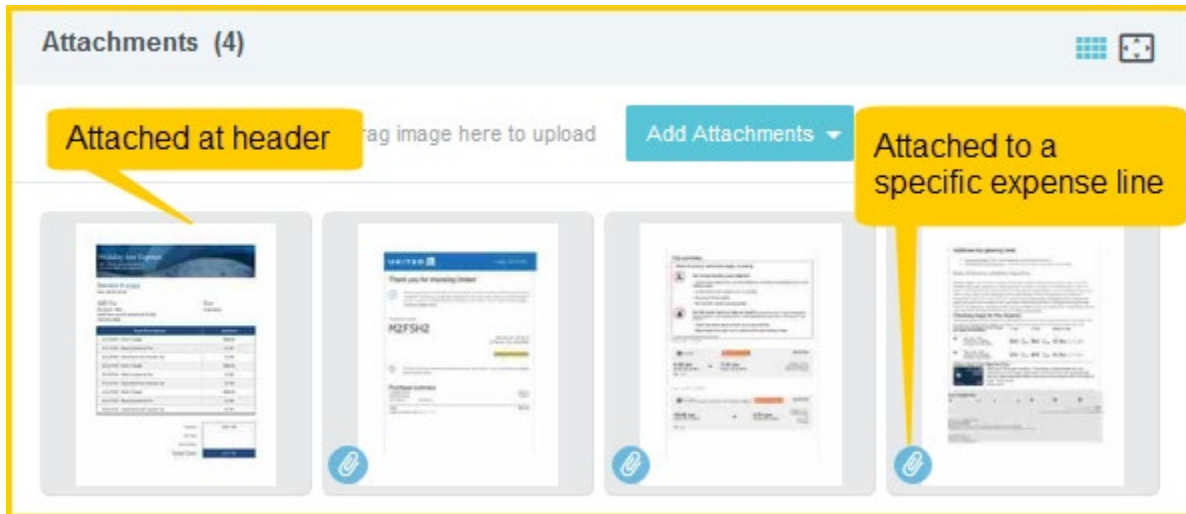
NOTE: You will see the expense report name and the number of images attached on the left side of the screen. Beneath will be the list of expenses on the report. By clicking the report title, you will see the receipts associated with the report.



The receipts that are attached to the report header AND to specific line items will be visible on this page. A paperclip on the expenses attached to lines will help you identify where on the report they are attached.

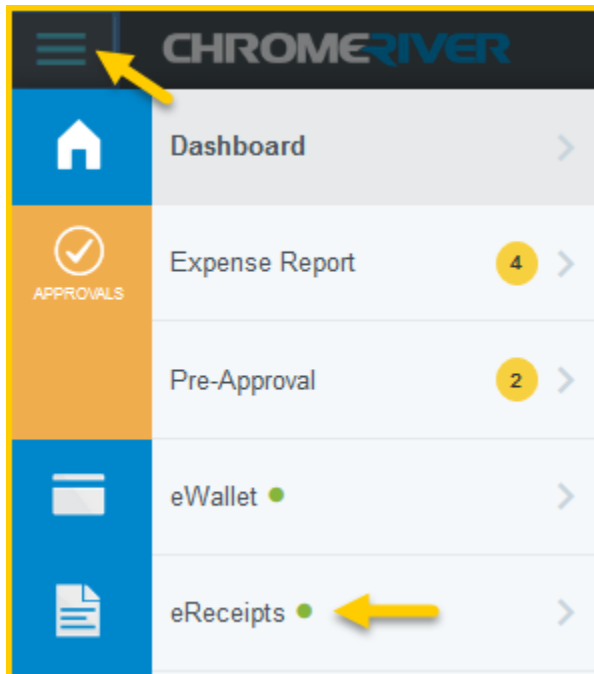


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UPLOAD TO THE RECEIPT GALLERY:

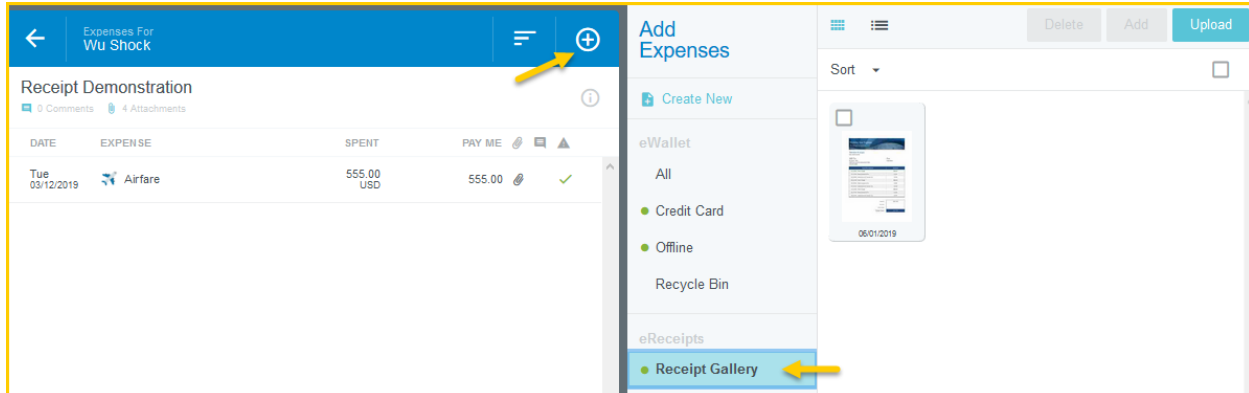
The **Receipt Gallery** is part of your Chrome River **eWallet**. It can be accessed by clicking the three line icon on the navigation bar and selecting **eWallet**.



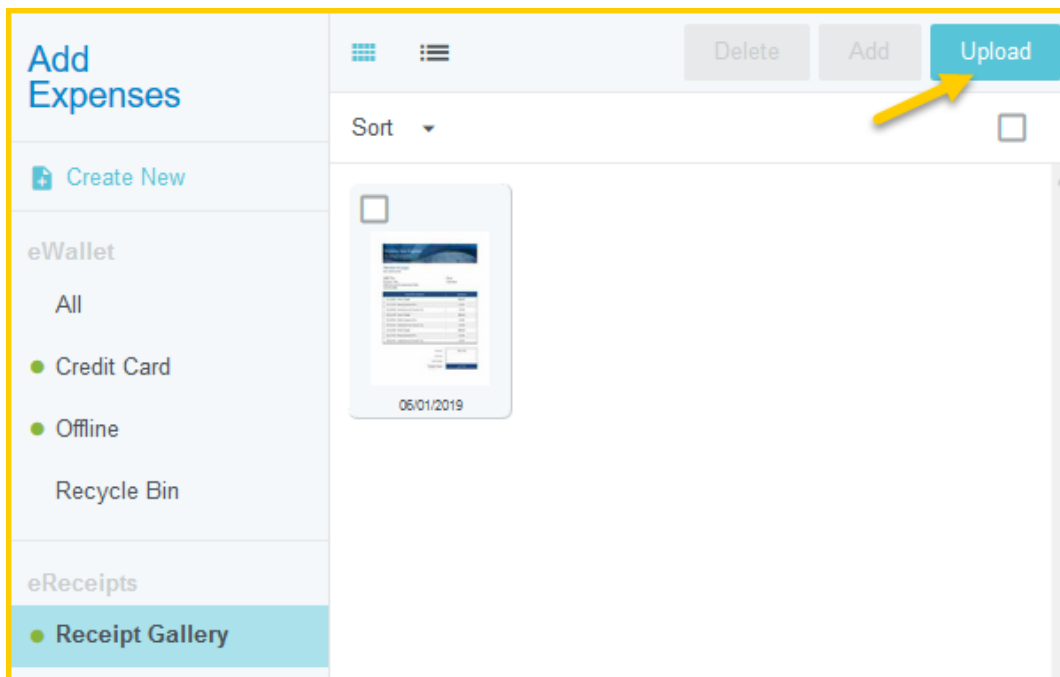


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The **Receipt Gallery** can also be accessed from within a report by clicking on the  icon and selecting **Receipt Gallery** from the **eWallet**.



Once in the **Receipt Gallery**, you can click **Upload** to upload new images that are saved on your computer or device.



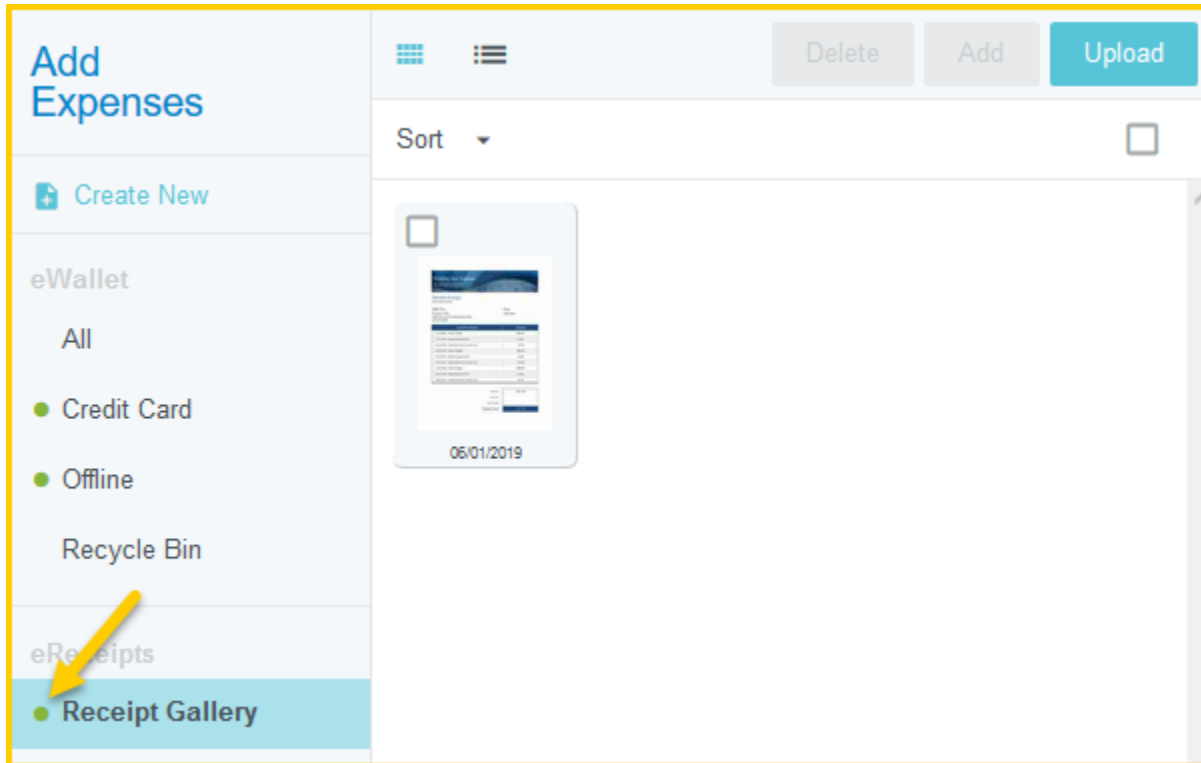
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Attaching Images from Receipt Gallery

A green dot next to the **Receipt Gallery** indicates that there are receipts that are unused and available to attach to a report or line item.



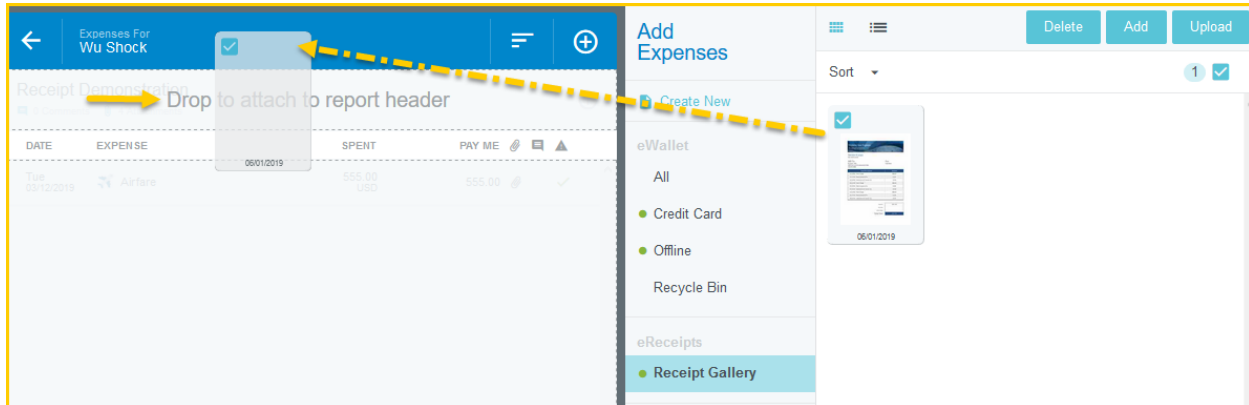
ATTACH IMAGE TO REPORT HEADER OR LINE ITEM:

You can attach an image from the **Receipt Gallery** directly to the report header or line item by dragging and dropping from the **Receipt Gallery**.

Access the **Receipt Gallery** from within a report by clicking on the  icon to bring up the **E-Wallet** and select **Receipt Gallery**. Choose the receipt from the gallery you want to add. Click on the image but do not release until you've dragged the image to the report header. When you've dragged it to the correct spot, Chrome River will prompt to **Drop to attach to report header**.

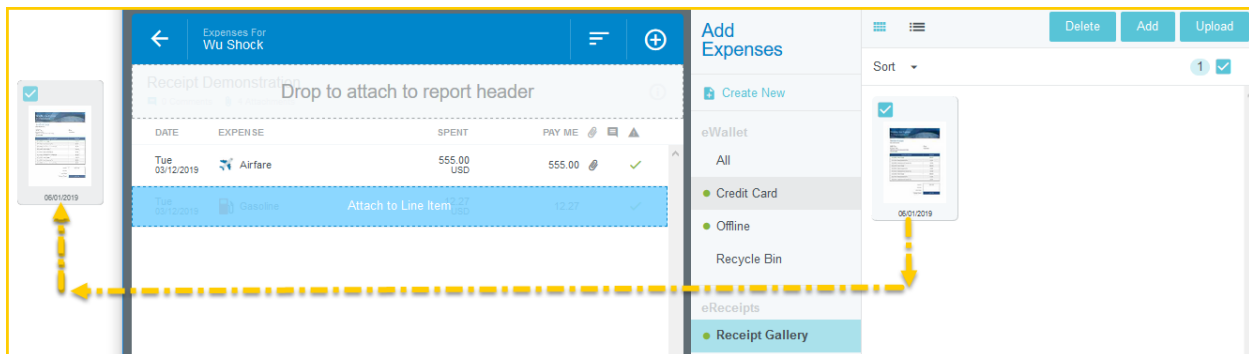


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The same method can be applied to line items. If there is a line item created available, Chrome River will prompt you to drop the image on the line. When there are multiple line items created, drag the image to the left of the expense screen. Chrome River will highlight the expense line the image will be attached to. Move the image up or down until the correct line item is highlighted and release the image.

NOTE: Multiple receipts and images can be attached to a single expense.



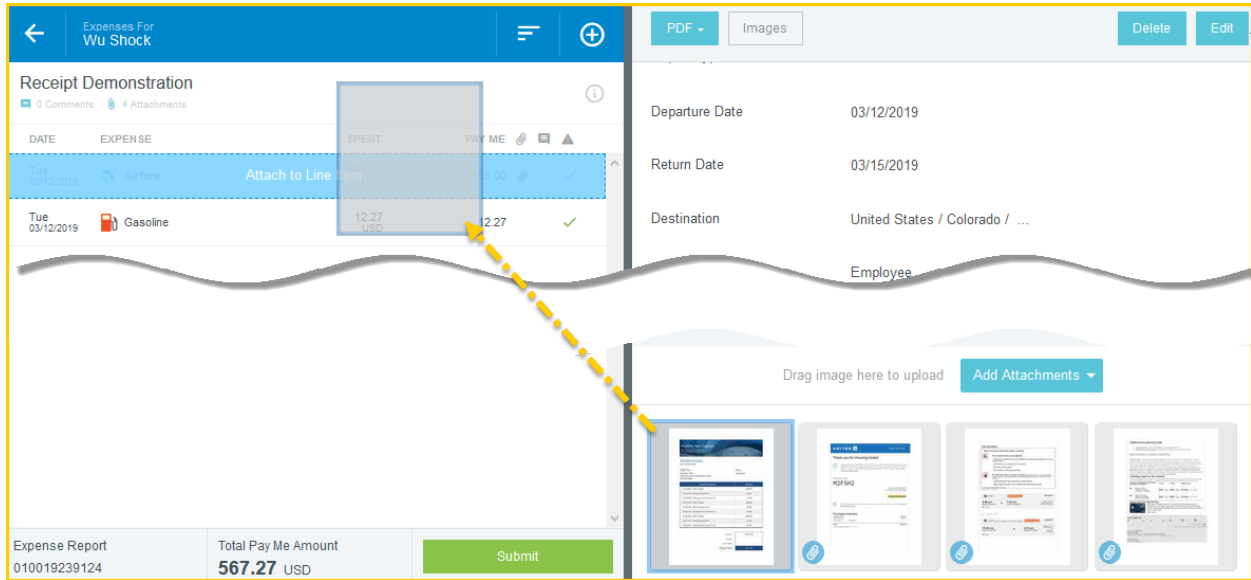
MOVING RECEIPTS AND IMAGES FROM REPORT HEADER TO LINE ITEM:

If you decide you want to move a receipt from the header to the line item, you can drag the receipt from the header view to the line item.

Click the report header to view the receipts attached. As mentioned in the **Uploading Directly to a Line Item** section above, you will be able to identify the receipts that are attached only to the report header by the absence of a blue paperclip icon. You can select one of these images, click, drag, and drop to the line item of your choice.



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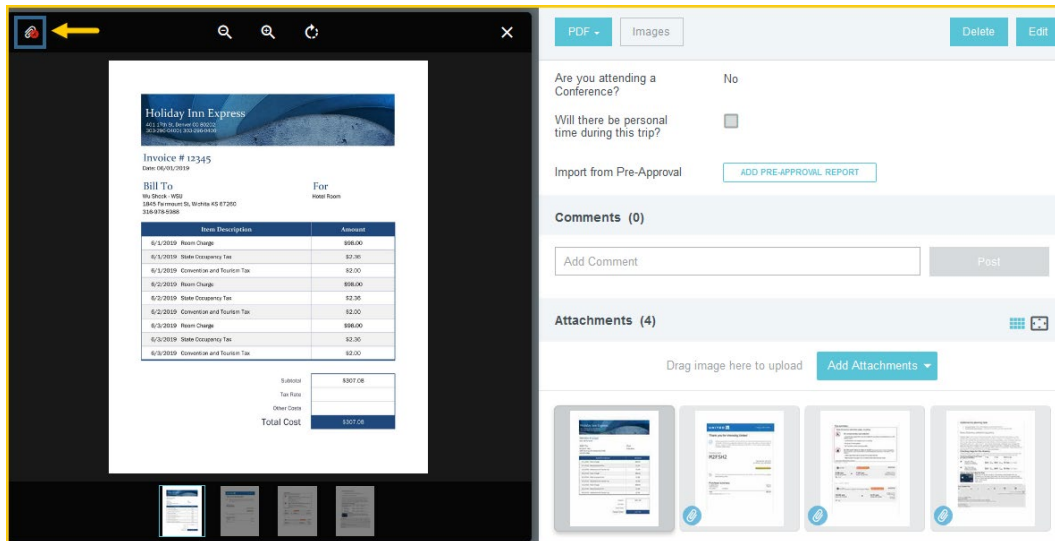
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Detach and Delete Receipts

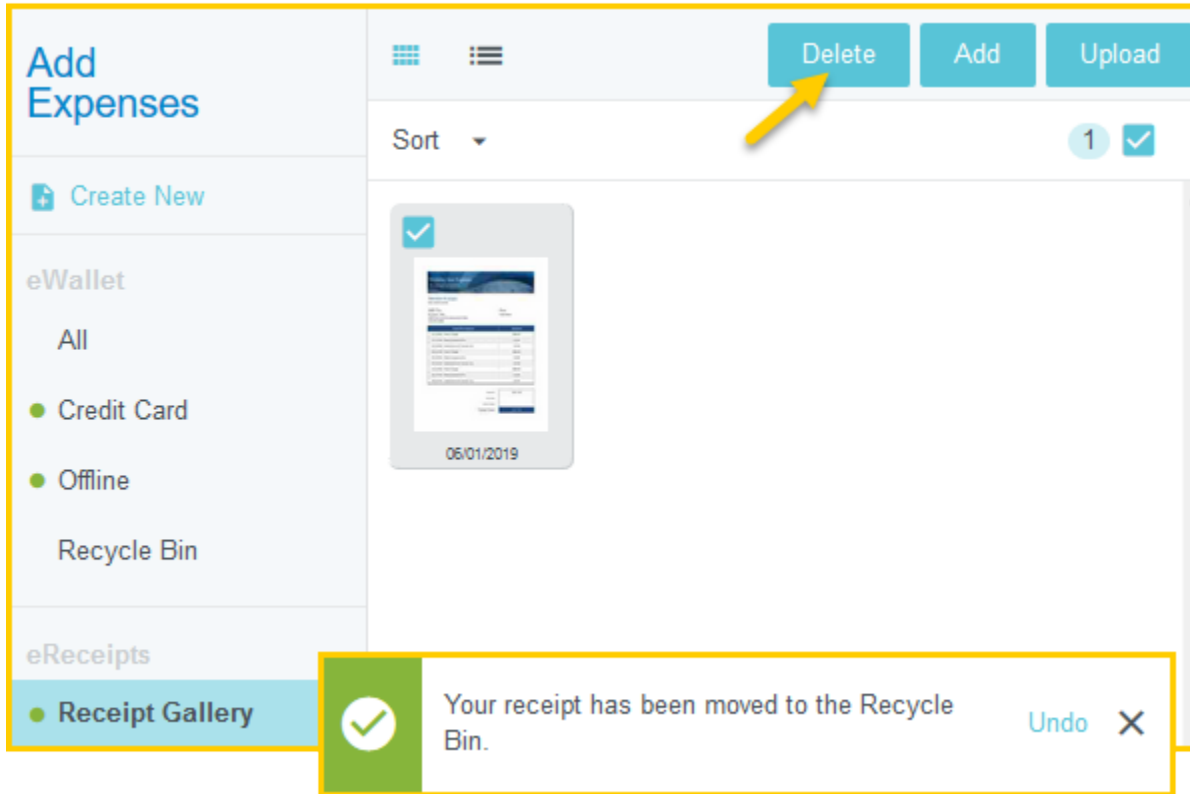
If the receipt has already been attached to a report header or line item, you can detach it by clicking on the receipt thumbnail at the bottom of the right hand screen to bring up the larger receipt image on the left. Click on the paperclip in the upper left corner. This will remove the receipt from the report. The receipt will go into the **Receipt Gallery**.



To delete a receipt from the **Receipt Gallery**, check the receipt(s) you wish to delete and then click the **Delete** button. A confirmation message will appear and the receipt will go into the **Recycle Bin**. The receipt will no longer appear in the **Receipt Gallery**.



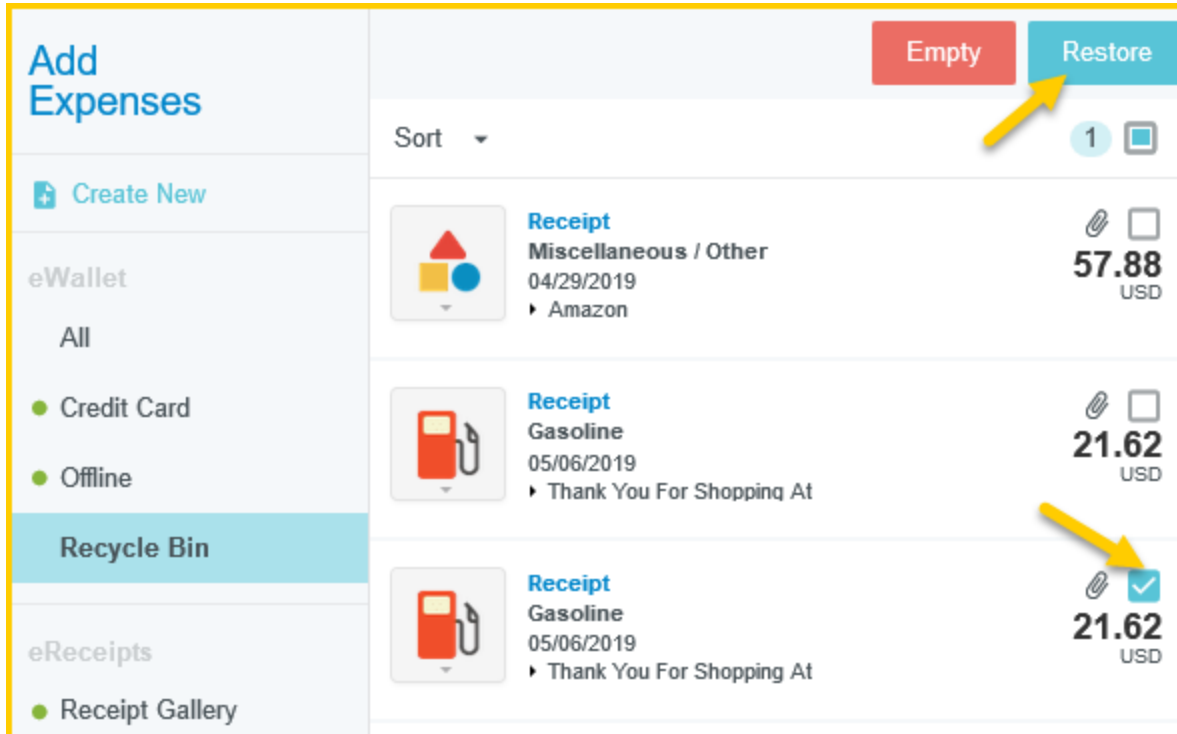
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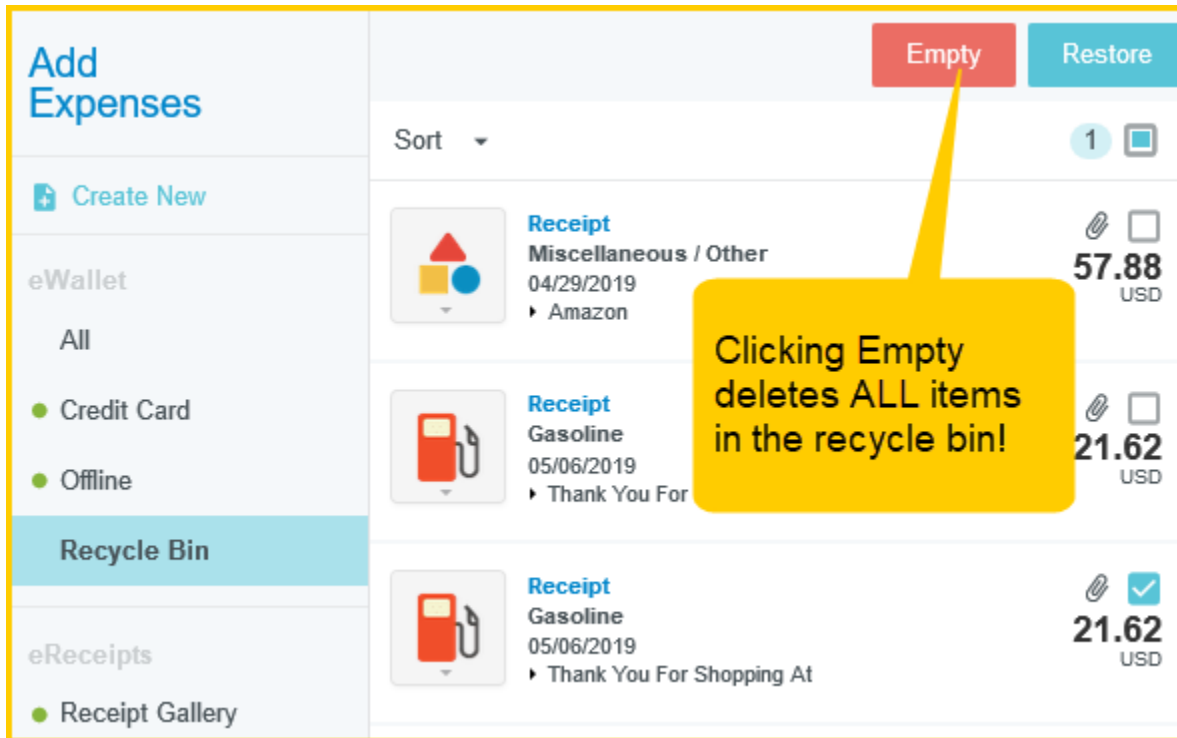
Receipts that have been sent to the **Recycle Bin** can be restored to the **Receipt Gallery** if you wish. Choose the receipt you wish to send back to the **Receipt Gallery** and click **Restore**.



If you click on the **Empty** button, you will permanently remove all of the receipts in the **Recycle Bin**, whether it is checked or not. Do not click this unless you would like to delete **all** of the receipts from your **e-Wallet Recycle Bin**.



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Receipt Transactions and Optical Character Recognition

When a receipt or group of receipts is emailed, scanned, or uploaded to the **Receipt Gallery**, Optical Character Recognition (OCR) will attempt to create a transaction based on the information it can pull from the receipt(s), which may include the amount, vendor and expense type. Any information pulled by OCR from the receipt can be manually adjusted, if required, once applied to a report.

NOTE: OCR only works when a receipt is emailed, scanned, or uploaded into the **Receipt Gallery**. Receipts that are attached directly to reports will not be read by OCR; however, if there is more than one receipt on the page, the system will attempt to crop the receipts to form separate receipt images, regardless of the manner it is sent, unless uploaded directly to a line item.

MERGING CREDIT CARD TRANSACTIONS AND RECEIPTS:

If OCR recognizes that the receipt corresponds with an unapplied **UMB Pcard Expense** transaction, it will attempt to merge the **UMB Pcard Expense** transaction and receipt together to form one transaction.

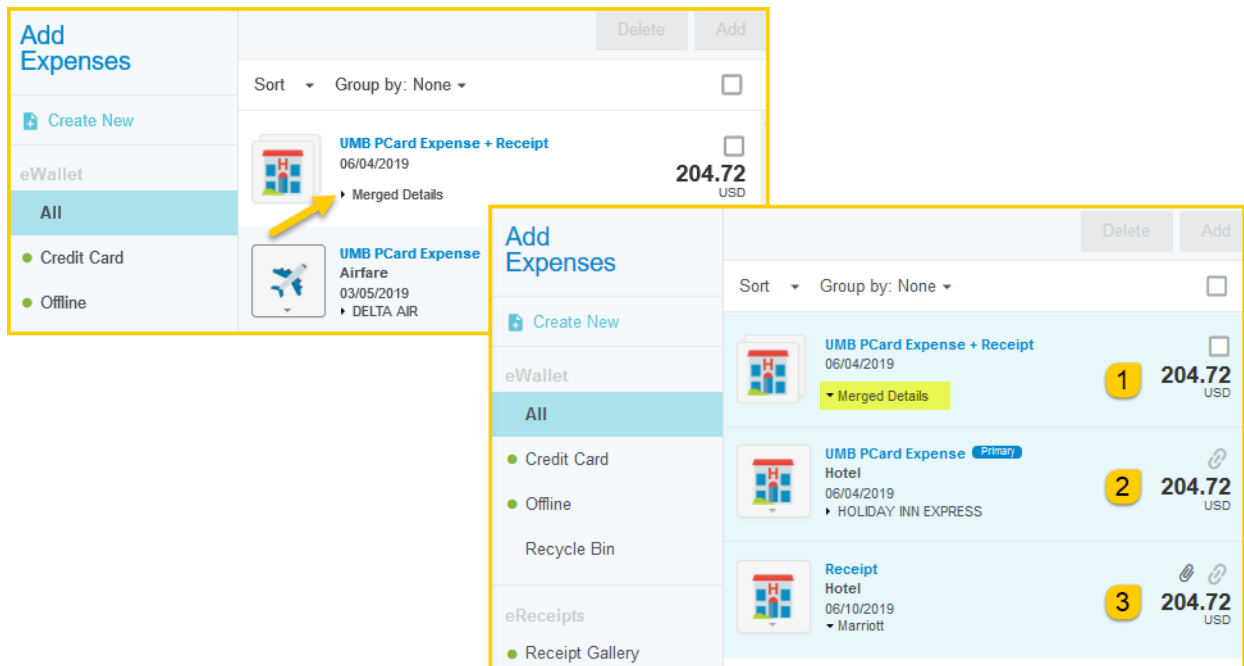


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You can identify when these transactions merge, as the **UMB Pcard Expense** transaction will show **Merged Details** and have a drop down arrow which you can click on to expand the details of the transaction.

Three lines will appear for the expense:

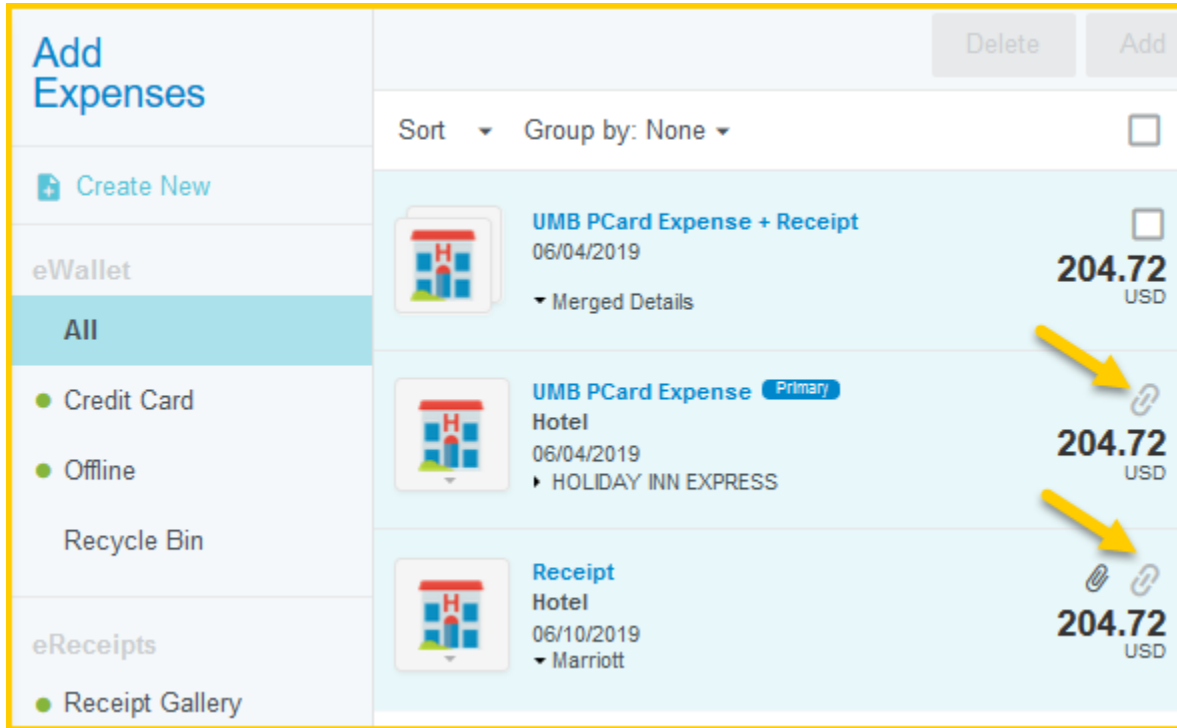
1. the newly created merged transaction will appear first,
2. the **UMB Pcard Expense** transaction second (identified as **Primary**)
3. the receipt, third



Note: If OCR identifies a receipt as belonging to a **UMB Pcard Expense** transaction in error, you can unmerge by clicking on the paperclip outline on either the primary or receipt transaction. The receipt will go back to the **Receipt Gallery**.



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For information on applying **UMB Pcard Expense** transactions, please see the **CR0014 Creating a Pcard Reconciliation Report** help document.

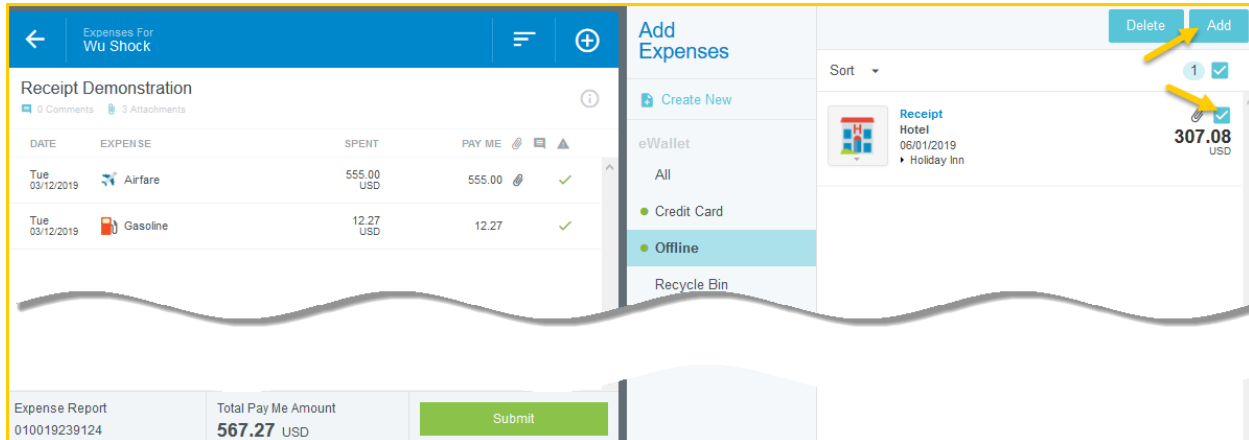
OFFLINE TRANSACTIONS:

If OCR does not recognize that the receipt emailed, scanned or uploaded to the **Receipt Gallery** is related to a **UMB Pcard Expense** transaction, the system will create an offline transaction that you can later apply to an expense report as an out of pocket expense.

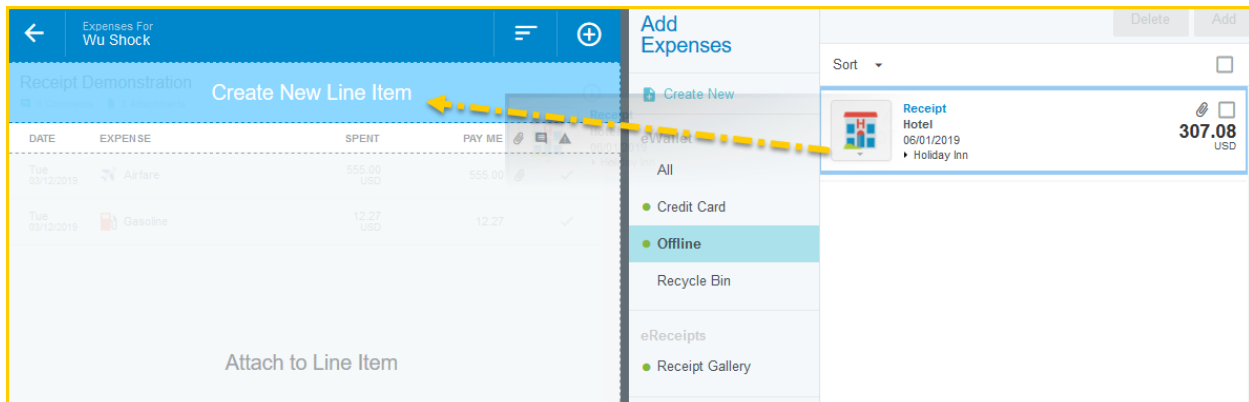
You can apply the expense to a report by checking the box next to the expense and clicking **Add**.



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You can also drag and drop the expense directly into the expense report.



For more information on expensing an out of pocket expense, please view the **CR0006 Create a Pre-Approval Report - Employee**, or **CR0011 Creating a Travel Expense Report - Employee** help document.

NOTE: If the receipt connected to the offline transaction is applied to an expense, the offline transaction will no longer be available.

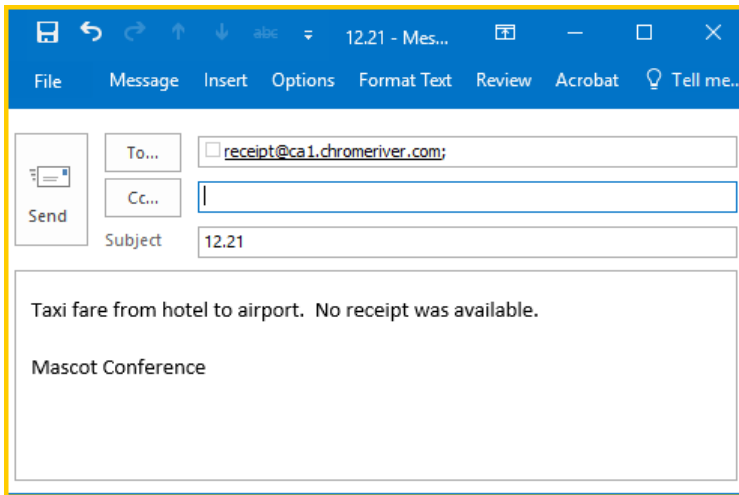
EMAIL MEMO:

If you have an expense, such as a tip, that does not require a receipt, you can email a memo as a reminder to your **eWallet** as an offline receipt. This will create a transaction in your **Offline** expenses of your **eWallet** and no image will be sent to the **Receipt Gallery**.

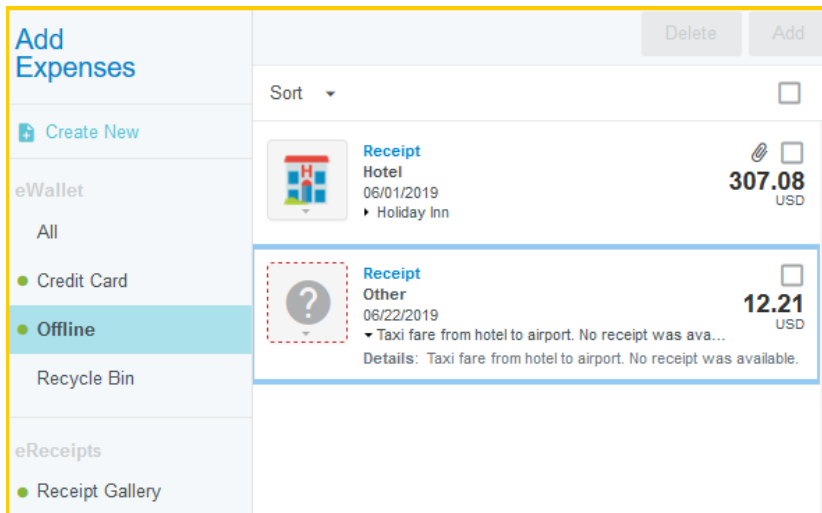


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To email, enter the amount of the expense in the email subject and send the email to receipt@ca1.chromeriver.com just as with a regular receipt. However, instead of the receipt attached in the body of the email, you will enter a description of the expense.



To access this expense, go to your **eWallet** and select **Offline**. The amount will show in your **Offline** transactions and can be applied to a report in the same way described above for other offline transactions.



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