Dashboard (Homepage) Navigation

This training provides a high-level overview of the Chrome River Dashboard (the CR Homepage). Every time the user logs in, they will be transferred to the dashboard first and must navigate from there. Note: the name in the top left-hand corner is the Expense Owner (username) for the dashboard.

1. Expenses Draft: Every expense report that is in draft format and has not been completed will appear under this tab.
2. Expenses Returned: Every expense report that has been returned to the Expense Owner/user will appear under this tab.
3. Expenses Submitted: Every expense report that has been completed and submitted by the user will be available under this tab.
4. Pre-Approvals Draft: Every pre-approval that is in draft format and has not been completed will appear under this tab.
5. Pre-Approvals Returned: Every pre-approval that has been returned to the Expense Owner/user will appear under this tab.
6. Pre-Approvals Submitted: Every pre-approval that has been completed and submitted by the user will be available under this tab.
7. Select this button to bring up a list of tabs the user can access.
8. eWallet: Select this tab to gain access to the user’s eWallet.

9. Credit Card: Any expenses associated with a P-Card or Travel Card is located here.
10. Cash Advance: Any Travel Advances (Cash Advances) the user has will appear in this tab.
11. Offline: All expense line items that are created from receipt and Memorized Expenses are located here.
12. Recycle Bin: All items deleted from the eWallet can be found here.
13. Receipt Gallery: View all images of the receipts associated with this Expense Owner/user here. Receipts can also be manually uploaded here was well.
14. Select this button to go back to the list of tabs available to this user.

15. All Pre-Approvals and Expense Reports that are in Drafts, Returned, or Submitted can be accessed through these tabs.
16. The user can access to analytics and analytic reports through the tabs located here.
   Note: See the training document(s): **Analytics Overview Part 1 and Part 2** for a breakdown of how to use the Chrome River Analytics reports.
17. New: Select this button to bring up the options to create a new expense report or a new pre-approval
19. New Pre-Approval: Select this button to create a new pre-approval. See Pre-Approval-Header and Expense Types Summary for an overview of pre-approvals in Chrome River.
Note: The Help button will not be covered in this training. Chrome River provides training documents, videos, and examples that are not associated with Virginia Tech. Just because Chrome River gives training examples on various items, the user needs to be aware that the same functionality may not be available on Virginia Tech forms.

20. Expense Owner (username): Select the Expense Owner name to bring up the drop-down of the list of Delegates, Settings, and Help button.

21. The list of delegates the user has access to is located here. Note: See the training document - Assigning & Removing Delegates for a more detailed breakdown on the delegate functionality.

22. Settings: Select this button to review the settings for this Expense Owner.
23. Personal Settings: This tab allows the user to add an additional (alternative) email other than their VT email to their account. Note: The user still needs to sign in through single sign-on and cannot use this alternative email to login. This email will primarily be used for specialized functions such as email notifications.

24. Preferences Settings: This tab allows users to change the language, date format, or number format.

25. Delegate Settings: Add a user to be a delegate for this Expense Owner or add a “Vacation Delegate” to complete individual approvals (not Group Approvals).

26. Notification Settings: Choose to alter which functions notifies the user via email. These functions could be:
   
a. General Notifications: Receipt processed, payment is processed, etc.

b. Expense Report Notifications: Approver adjusts an expense report, expense report requires approval, or an expense report has been returned.

c. Pre-Approval Notifications: Pre-Approval requires approval, pre-approval has been returned, pre-approval has been fully approved.

d. Scheduled Report Notifications: Reminders for original approval email and that items are ready to export.