

EXPENSE Training Guide

Quick Start Guide

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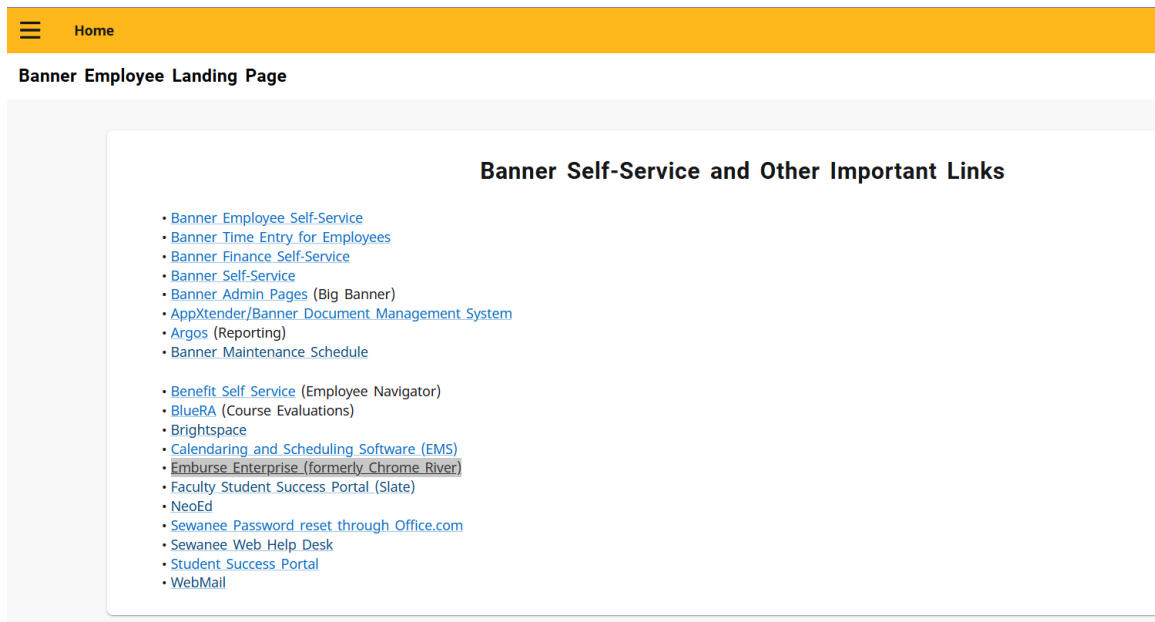
Emburse EXPENSE: Quick-Start Guide

This guide will give you the basics needed to hit the ground running with Emburse EXPENSE. Detailed user guides are available in the Emburse Help Center, accessible via the "Help" link in the upper right-hand corner of the application.

Launching and Logging in to the Emburse Application

Launch the Emburse application from any web browser at <https://admin.sewanee.edu/>. You must use your single sign on to your Sewanee.edu email account. You must disable pop-up blockers in order to view and print PDF reports.

FIRST LOG IN



The screenshot shows the Banner Employee Landing Page. At the top is an orange navigation bar with a hamburger menu icon and the word "Home". Below this is a header section titled "Banner Employee Landing Page". The main content area is titled "Banner Self-Service and Other Important Links" and contains two columns of links. The first column includes links for Banner Employee Self-Service, Banner Time Entry for Employees, Banner Finance Self-Service, Banner Self-Service, Banner Admin Pages (Big Banner), AppXtender/Banner Document Management System, Argos (Reporting), and Banner Maintenance Schedule. The second column includes links for Benefit Self Service (Employee Navigator), BlueRA (Course Evaluations), Brightspace, Calendaring and Scheduling Software (EMS), Emburse Enterprise (formerly Chrome River), Faculty Student Success Portal (Slate), NeoEd, Sewanee Password reset through Office.com, Sewanee Web Help Desk, Student Success Portal, and WebMail.

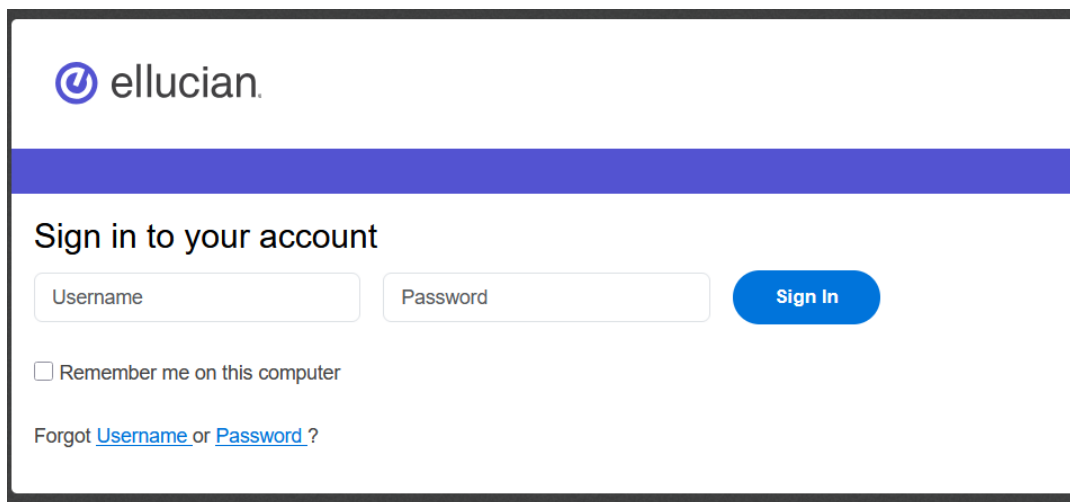
Banner Employee Landing Page

Banner Self-Service and Other Important Links


- [Banner Employee Self-Service](#)
- [Banner Time Entry for Employees](#)
- [Banner Finance Self-Service](#)
- [Banner Self-Service](#)
- [Banner Admin Pages](#) (Big Banner)
- [AppXtender/Banner Document Management System](#)
- [Argos](#) (Reporting)
- [Banner Maintenance Schedule](#)
- [Benefit Self Service](#) (Employee Navigator)
- [BlueRA](#) (Course Evaluations)
- [Brightspace](#)
- [Calendaring and Scheduling Software \(EMS\)](#)
- [Emburse Enterprise \(formerly Chrome River\)](#)
- [Faculty Student Success Portal \(Slate\)](#)
- [NeoEd](#)
- [Sewanee Password reset through Office.com](#)
- [Sewanee Web Help Desk](#)
- [Student Success Portal](#)
- [WebMail](#)

REGULAR LOG IN

Complete the Login Screen:



The screenshot shows the Ellucian login screen. At the top is the Ellucian logo. Below it is a blue horizontal bar. The main heading is "Sign in to your account". There are two input fields: "Username" and "Password". To the right of the Password field is a blue "Sign In" button. Below the input fields is a checkbox labeled "Remember me on this computer". At the bottom, there is a link that says "Forgot Username or Password ?".



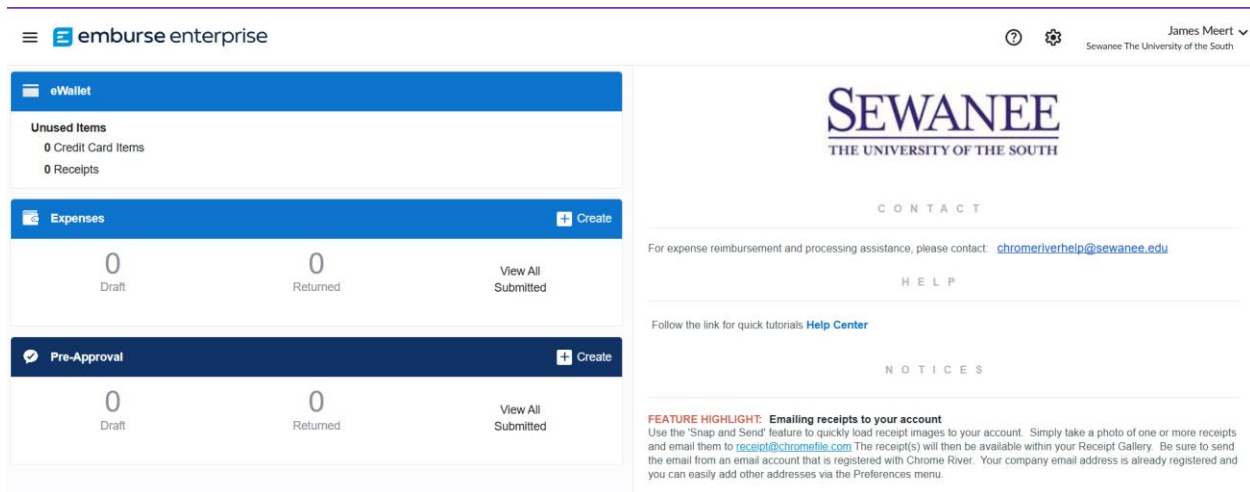
Sign in to your account

Username Password **Sign In**

☐ Remember me on this computer

Forgot [Username](#) or [Password](#) ?

If you have multiple google accounts on your browser, you may still need to select which Gmail account you want to use.



Creating a New Expense Report

A new expense report can be created for each event, or events can be combined into a single report.

1. From the Home Dashboard or the Expense Dashboard, click the **NEW EXPENSE REPORT** button. The **Expense Entry Screen** will appear
 - a. The Expense Header section stores all the basic information that applies to every expense listed on the report.
 - i. Expense Owner
 - ii. Report Name
 - iii. Pay Me In
 - iv. Business Purpose
 - v. Additional Details
 - vi. Start and End Date
 - vii. Do you have a University Pcard

2. For your first expense, click on the + button to show the menu options for adding expenses. There are three main options for adding expenses
 - a. Create New - create a cash out of pocket transaction
 - b. Credit Card - Transactions are loaded daily and are available to apply to your expense report
 - c. Off Line - emailed items, receipt images & HTML emails

CREATE NEW EXPENSES:

To add a direct expense, select the desired mosaic button or use the "Search Expense Type" at the top. Buttons with arrows will display additional options. Once your selection has been made, complete the required fields. Once complete hit SAVE to add transaction.

CREDIT CARD TRANSACTIONS:

To select a credit card transaction, click on the box above the dollar amount. You can select multiple transactions at once. To add the credit card transaction(s) to your report, simply hit the plus icon in the top right of your screen.

OFFLINE TRANSACTIONS:

These are cash receipts sent in using "Snap & Send", or HTML emails sent to receipt@chromefile.com. The transactions are treated as an out of pocket expense. Please see receipt section below for a detailed picture.

TRAVEL TRANSACTIONS:

Only add travel transactions if you have a matching credit card transaction or a receipt to match the out of pocket travel expense. If a receipt/credit card transaction do not auto merge (link together), you can manually merge the data together

under the "ALL" section. It is recommended to sort ALL transactions by amount to quickly organize the transactions. To complete a merge, select the desired transactions. A blue merge button will appear. Hit the merge button to complete.

3. In the preview pane on the right side of the screen, you can see a summary of the expenses you have added and add notes, receipts and items to your expense report.
4. After the expenses have been added to the report, click **SUBMIT** if you are done or click **CLOSE** to be taken back to the Expense Dashboard.

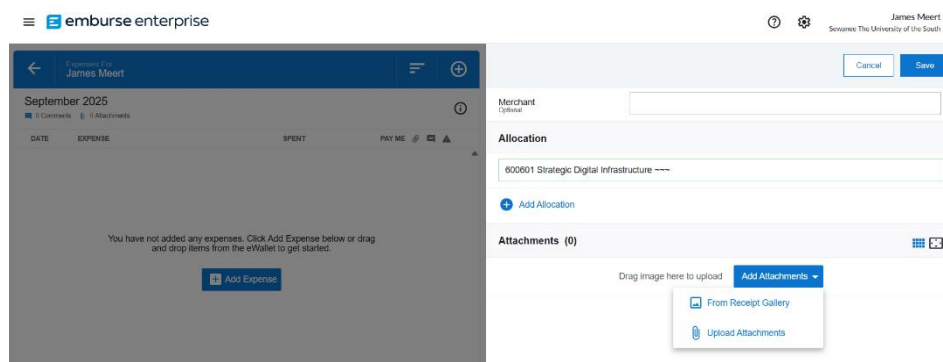
Attaching Receipt Images

Receipt images may be uploaded as a PDF, JPG, or GIF, emailed, or faxed to be immediately attached to your expense report.

UPLOAD PDF RECEIPTS

If you choose to upload PDF receipts, the maximum size for a single upload is 5 MB, and the combined size of all the PDF, JPG, or GIF uploaded must be 100 MB or less. **From Within the Expense Report:** On the Expense Entry Screen, click on the **RECEIPTS**. Click on **Browse File to Attach** to attach your images file(s). Once uploaded, you can drag & drop the receipts on to the desired expense item. This action will link the image to the line item.

From the Expense type: Highlight the expense type to which you would like to attach receipts. Click the **Add Attachments** to attach your images file(s).



EMAIL MEMO RECEIPTS "SNAP & SEND"

Chrome River's Email Memo feature allows you to use your smartphone to create new expense items—with or without images—for later attachment to an expense report online. Receipts submitted this way must be JPGs of less than 5 MB.

1. Use your phone to take a photo of the receipt.
2. Draft a new message containing the following information.
 - a. **To:** receipt@chrome.com
 - b. **From:** your.name@sewanee.edu
 - c. **Subject:** xx.xx [dollar amount] This is an optional field. You can leave blank and allow OCR to populate.
 - d. **Body:** For [x] business purpose This is an optional field. You can add additional information for description if desired.
3. The "From" email address must be the one associated with your account in Emburse EXPENSE online.
4. Attach the receipt photo.
5. Send the message to receipt@chrome.com
6. Once it is received, you will be able to view and attach the email memo in the Offline section or Receipt Gallery. If entering as Offline that will create a cash out of pocket transactions using the amount and Receipt Gallery will allow you to just add the receipt.

Submitting a Report

- To submit an open expense report, click **SUBMIT** in the lower right-hand corner of the Expense Entry Screen.
- To submit the expense report from the Draft Expenses List, highlight it in the grid on the Expense Dashboard. Click **SUBMIT** in the navigation bar.

After you click **SUBMIT**, you will be prompted to certify that the expenses are correct and for legitimate business purposes.

- Clicking **SUBMIT** again will send the report to the first step in the approval routing process.

POLICY COMPLIANCE WARNINGS & VIOLATIONS

A breach of policy will trigger a warning or violation message when you click SUBMIT.

- A compliance **warning** indicates that additional information is required before the expense can be submitted for approval and processing. Click on the red warning symbol and either modify the data or enter a reply. Then click **SAVE** to proceed.
- A compliance **violation** indicates that the expense cannot be submitted for approval and payment based on the company's policies as defined in the system. Click **CANCEL** on the Submit screen, make any required changes, and select **CLOSE** or **SUBMIT** again.

Report Tracking

Once the expense report has been submitted, it will appear in the Submitted Expense Reports list. From here, you can track its progress through the approval routing process by highlighting the report and clicking **TRACKING**.

The screenshot shows the 'emburse enterprise' interface. At the top, there's a header with the company name and a user profile for 'Suzanne The University of the South'. Below the header, a blue bar indicates 'Tracking for September 2025'. The main content area is divided into two sections. On the left, a table lists expense reports with columns for 'EXPENSE TYPE', 'AMOUNT DUES', 'STATUS', and 'CURRENTLY ASSIGNED'. The table shows three entries: 'Parking - 6311' (15.00, Pending Approval), 'Car Rental Fuel - ...' (37.93, Pending Approval), and another 'Parking - 6311' (15.00, Pending Approval). On the right, a detailed view for 'Parking - 6311' is shown. It includes fields for 'Spent Converted' (15.00 USD), 'Amount Spent' (15.00 USD), and 'Routing Status' (Pending). Below these, a 'Routing Steps' section shows a flowchart with four steps (1, 2, 3, 4), where step 1 is highlighted. Further down, there are fields for 'Step Number' (1), 'Assigned To', and 'Assigned Date'.

Inquiry Reports

The Inquiry Dashboard allows you to create reports and perform quick inquiries on all your activity by category: expense reports, expense items, delegates, calendar, credit card items, firm-paid items, approvals and paid expenses.

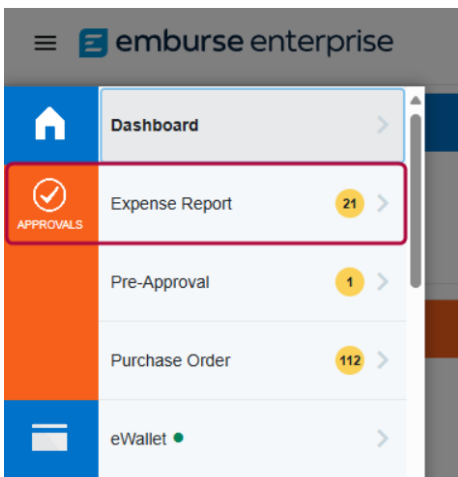
1. Click on **INQUIRY** from any Dashboard.
2. Under the Reports tab, select the report you would like to generate.
3. Select the criteria for the report

Expense Approval

If you are part of the approval process, Emburse EXPENSE makes this very important task easy by allowing you to approve expenses online, by email, or via the mobile app. The first two methods are covered below; mobile app approval will be covered in the Mobile Expenses section.

APPROVE ONLINE

1. Log in to Emburse EXPENSE and navigate to the Approval Dashboard.



2. The Approval screen shows all the reports waiting for your approval. Highlight an expense report and click **OPEN** to review it.
3. The Expense Approval Screen lists each line item that requires your approval on the left and provides expense details, notes and receipt images on the right.
4. You can review, adjust, or return each line item individually by highlighting it in the list.
 - a. Clicking **ADJUST** will open the expense item so that you can change the approved amount, business purpose, and/or cost center. You may also add a note.
 - b. Clicking **RETURN** will send the expense item back to the expense owner.

✓

Approvals Needed

Expense Reports

Pre-Approvals

Invoices

☰

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<input type="checkbox"/>	REPORT OWNER	SUBMIT DATE	AMOUNT SPE...	▲
<input type="checkbox"/>	Kessing, Bob Gym Membership 010013172898	07/07/2025	30.00 USD	✓
<input type="checkbox"/>	Johnson, Jeff Travel to office 010013204761	07/08/2025	43.00 USD	✓
<input type="checkbox"/>	Johnson, Jeff Sales Calls in Madison, WI 010013129942	07/19/2026	260.56 USD	✓
<input type="checkbox"/>	Hoffman, Dave Supplies 010013358216	07/20/2026	4,773.50 USD	✓

Travel to office

Report Owner

👤

Jeff Johnson

Sales Manager

Submit Date

07/08/2026

Expense Report ID

010013204761

Rule Description

AP Audit - Accounting Audit

Prior Approvers

APPROVER	DATE
Bob Kessing	07/08/2026

APPROVE OR RETURN BY EMAIL

- Forwarding the email to approve@chromefile.com is equivalent to clicking **SUBMIT** in Emburse EXPENSE online.
- Forwarding the email to return@chromefile.com is equivalent to clicking **RETURN ALL** in Emburse EXPENSE online.

Approvals Needed

Expense Reports
Pre-Approvals
Invoices

<input type="checkbox"/>	REPORT OWNER	SUBMIT DATE	AMOUNT SPFL...	
<input type="checkbox"/>	Kessing, Bob Gym Membership 01001312285	07/07/2025	30.00 USD	✓
<input checked="" type="checkbox"/>	Johnson, Jeff Travel to office 01001320476	07/08/2025	43.00 USD	✓
<input type="checkbox"/>	Johnson, Jeff Sales Calls in Madison, WI 01001312282	07/19/2026	260.56 USD	
<input type="checkbox"/>	Hoffman, Dave Supplies 01001320216	07/20/2026	4,773.50 USD	✓

Travel to office

Report Owner

 Jeff Johnson
Sales Manager

Submit Date: 07/08/2026

Expense Report ID: 010013204761

Rule Description: AP Audit - Accounting Audit

Prior Approvers

APPROVER	DATE
Bob Kessing	07/08/2026