CHROME RIVER INQUIRY

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

To access inquiry reports, tap the MENU button in the upper left corner and then tap Inquiry.
You will see a list of inquiry reports, grouped by application (Expense, Invoice), to give a snapshot of the activity in each category and allow you to quickly find specific information.

Simply tap a report in the list to run it.
The results will appear in the pane on the right on larger devices or replace the report list on smaller devices. Drag the slider bar at the bottom to see columns that don't fit on the screen.

By default, you will see results for the current month. Use the Transaction Date filter in the upper right corner to change the date parameters.

You may also filter the results in any column with the funnel icon. Tap the funnel to select the parameters, then tap Filter.
To remove a filter, tap the funnel icon again and select **Clear**.

Tap any column header to sort results in ascending or descending order. An arrow will indicate the order.

You may group results by any column that has the three-dot icon to the left of its header name.
Simply drag the header name into the blue bar at the top to re-sort the list.

Recommended Inquiries

My Expense Reports
This inquiry provides a list of expense reports by total dollar amount. It cannot be used to view a list of paid expense reports. To view reports within a specific period, go to Create Report Date to select a date range.
My Expense Items

This inquiry will allow you to view the status, (Draft, Pending Approval, Approved, Returned, Exported, Partially Paid or Paid), of each individual expense that has been accounted for, in the Approved Status column. The Export Date is the date that the expense was sent to Banner for payment processing.

The Firm Paid column indicates whether the expense was charged to the UMB Pcard, (Yes), or if it was not charged to the UMB Pcard, (No). You can search by Transaction Date.

You can also request expense item detail along with the associated receipt images for up to 50 line items as a PDF. Simply click Request Images and a link to the PDF will be emailed to your primary email address.

Upon request, you will receive the message below.
You will receive an email from Chrome River with a link to download the PDF images.

Dear Kristie Courtney,

Your request images report is complete. Please use https://s3.ca-central-1.amazonaws.com/chromenver-bulk-reporting-c5-prod/7f202bb6-2fff-4673-9fcf-940c01a4e107.pdf to download the PDF.

Report code: E254M254-2019-7-7-711000000
From: 03/12/2019 - To: 03/12/2019
Example of PDF receipt.

You will receive the message below if the line items are more than 50. You can adjust the number of lines by changing the **Transaction Date** to fewer days. The **Total Count** is shown at the bottom of the report.
My Delegates

List of people you have entered unsubmitted expenses for.

My Expense Calendar

Your expenses can be reviewed in the form of a calendar. You can view the calendar by month with the option to view all or specific expense types. By clicking onto an expense within the calendar, you can view the details of a specific expense.
A second option to view expenses in the form of a list per week is also available. Click, Agenda to change the format. Again, you can view all or a specific expense type, and, you can click each expense for more detail.

Please note: this inquiry cannot be exported.

**My Items**

My Items is a listing of expense items that were created from UMB Pcard transactions. These items will appear on this list whether they have been accounted for or not. Items not accounted for will be indicated as No, and, items accounted for will be labeled as Yes, in the column labeled Is Used. This tool can be used for your UMB Pcard reconciliation. You can search by Transaction Date. Once the data is exported, you can filter on the Source column and select Pcard.
My Firm Paid Items (UMB Pcard transactions)

Itemized list of expense transactions that are paid for by the firm (WSU).

My Expense Approval Items

For approvers, this inquiry provides a list of expense items, per expense owner, that are your responsibility to approve. The inquiry includes each expense per line item along with the allocation shown as Client Matter. The status of each expense can be found in the Action column where you will be able to see if an expense is Pending, Returned, or Approved. Once reports are fully approved by all approvers, the expense items will no longer appear in this report.

My Paid Expenses

This inquiry provides a list of paid expense reports only by the total amount of each report. It lists the total UMB Pcard paid amount and the total amount due employee separately per report along with the date that the expense report was processed for payment.
My Pre-Approval Approvals

Lists all pre-approvals assigned to an approver in every stage of the approval process: approved, returned and awaiting approval.

My Expense Pre-Approvals

Lists all the pre-approvals created by the logged-in user.