Virginia's Community Colleges
Shared Services Center

Inquiry Dashboard Reporting

Purpose: To provide our Chrome River users with instructions on how to use the inquiry dashboard reporting feature for user activity reporting.

Disclaimer: This document does not contain instruction for each type of inquiry dashboard report type.

Additional resources are located on the SSC T&E Public Site and Chrome River Help.

Assistance is available by the SSC Help Center at 540-591-4000; 877-340-5577; help@ssc.vccs.edu

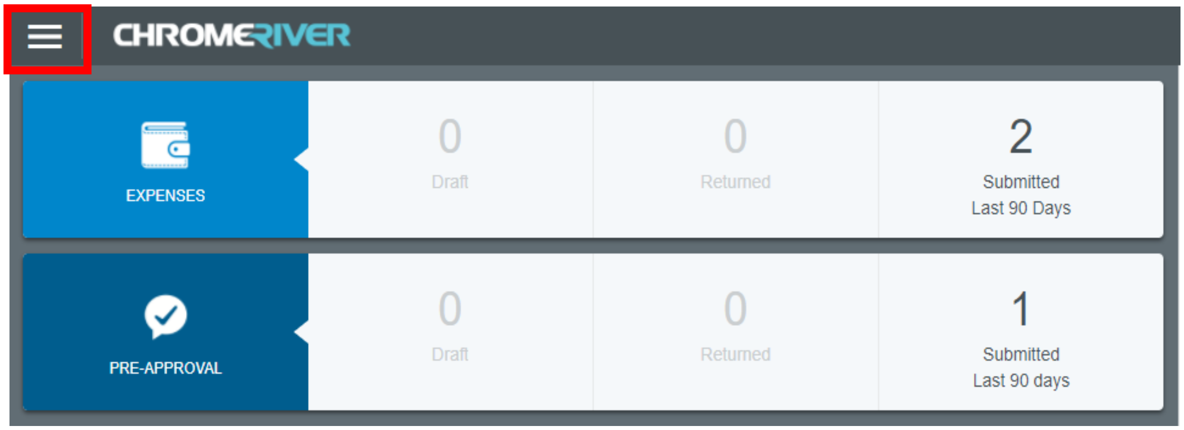
General Information:

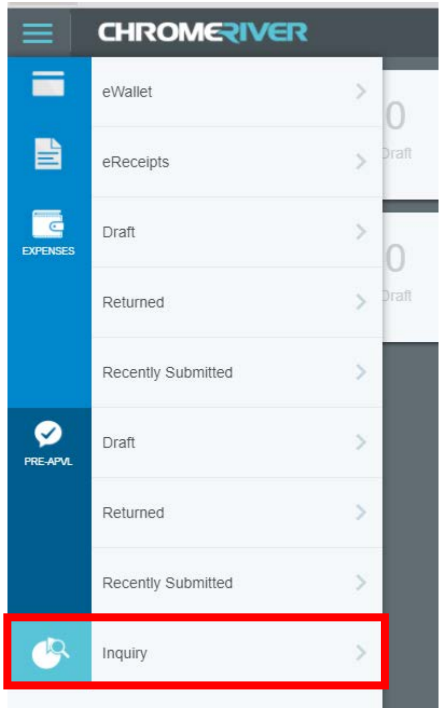
- The Inquiry Dashboard allows for you and your delegates to perform quick inquiries on all ***your activity*** by category. Categories may include the following:

Report Name	Description
My Expense Reports	Listing of your expense reports created within a specified date range. Sorted by: Create Date, Name, and Amount
My Expense Items	Listing of your itemized expenses within a specified date range. Sorted by: Transaction Date, Expense Type, and Amount
My Expense Calendar	Listing of expenses
My Firm Paid Items	Expenses that are marked as firm paid (Company Paid).
My Expense Approval Items	Expenses in approval process with each line item's Department information.
My Paid Expenses	My paid expenses (not applicable to VCCS users)
My Pre-Approval Approvals	Pre-Approvals in approval process.
My Expense Pre-Approvals	List of your Pre-Approvals

- The perimeters are standard for all Inquiry Report types.
- The Inquiry Reports have limited filter options.
- To view a video for Inquiry Reporting, please refer to the Chrome River Help.
    - Go to the Expense tab, select Inquiry at the bottom of the Expense menu.

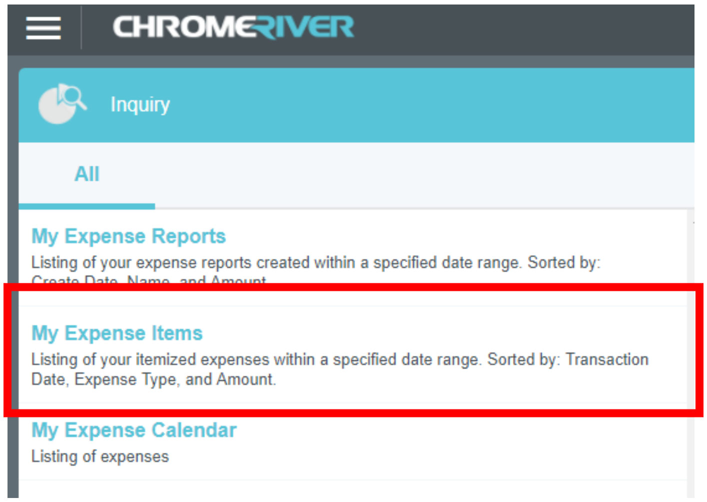
First, click the 3 lined icon at the top left corner of your Chrome River screen, and then click “Inquiry”.



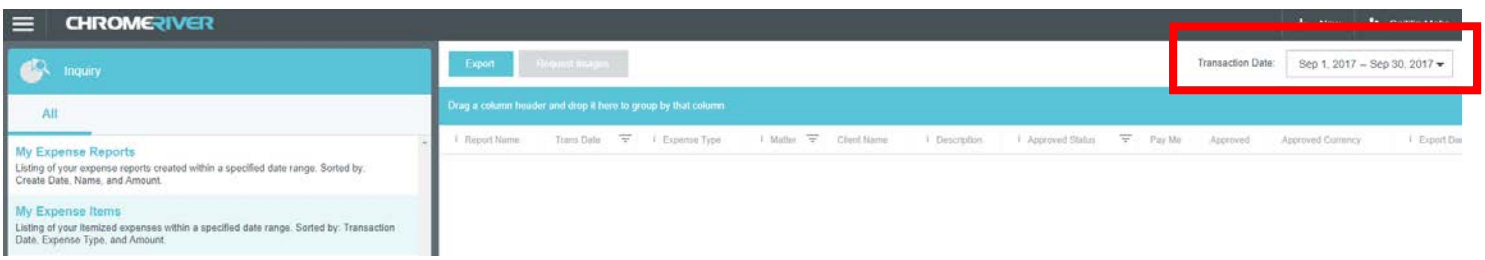


In this example, the instructions are for the My Expense Items report, as if you would be viewing your expenses.

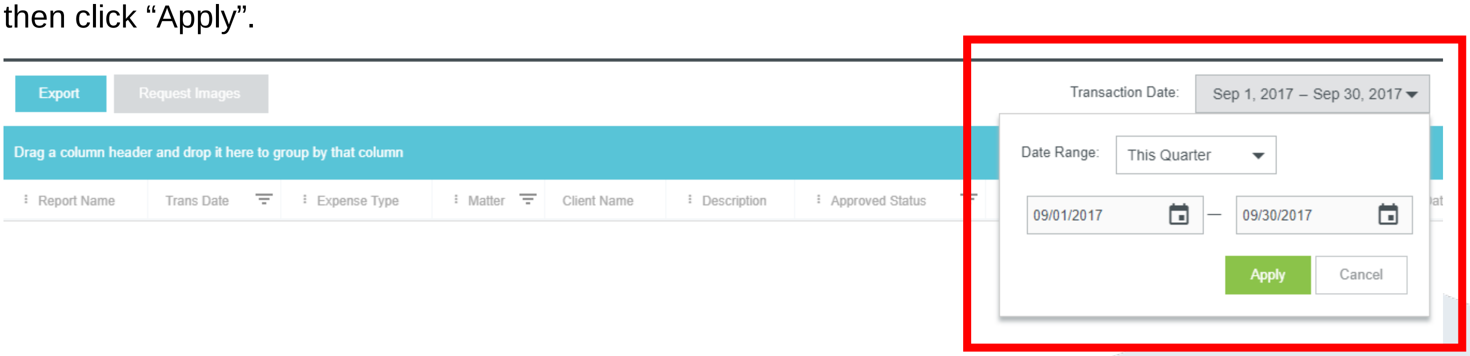
Next, select “My Expense Items”. The reporting data will populate on the right side of the screen.



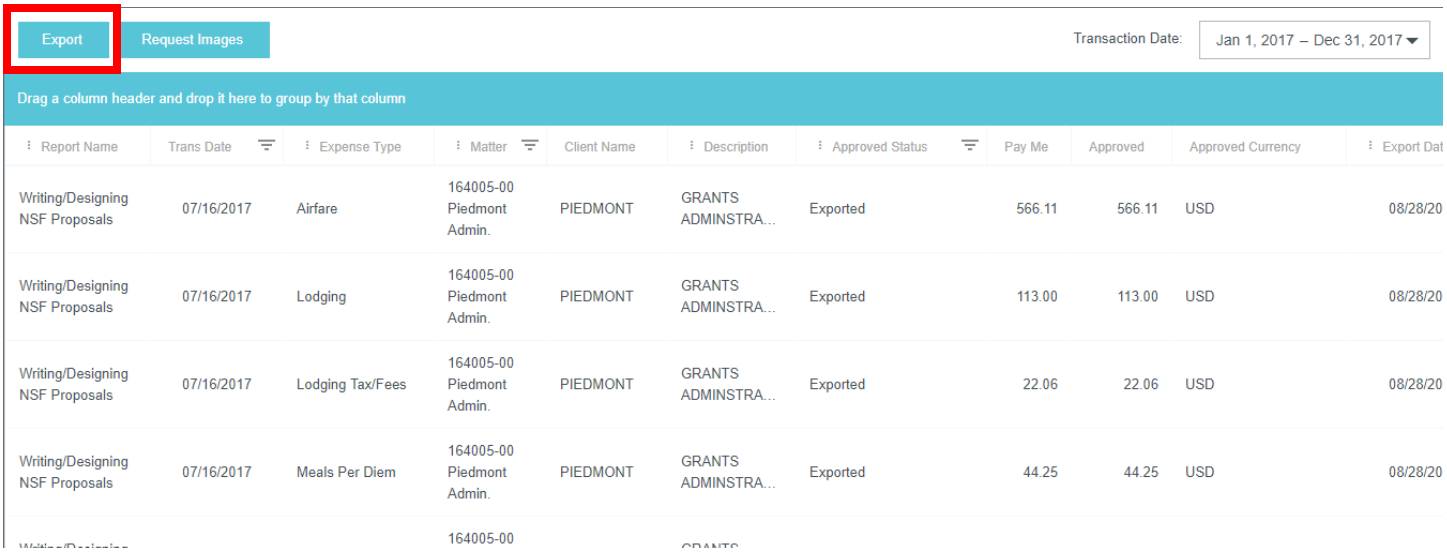
Click on the “Transaction Date” drop down menu to change the date period in which you are wish to review.



Next, select your “Date Range” by Quarter, Year, Month, etc., or you can customize your dates, and then click “Apply”.



If data populates, you may export the data to excel by clicking “Export”.



Report Name	Trans Date	Expense Type	Matter	Client Name	Description	Approved Status	Pay Me	Approved	Approved Currency	Export Dat
Writing/Designing NSF Proposals	07/16/2017	Airfare	164005-00 Piedmont Admin.	PIEDMONT	GRANTS ADMINSTRA...	Exported	566.11	566.11	USD	08/28/20
Writing/Designing NSF Proposals	07/16/2017	Lodging	164005-00 Piedmont Admin.	PIEDMONT	GRANTS ADMINSTRA...	Exported	113.00	113.00	USD	08/28/20
Writing/Designing NSF Proposals	07/16/2017	Lodging Tax/Fees	164005-00 Piedmont Admin.	PIEDMONT	GRANTS ADMINSTRA...	Exported	22.06	22.06	USD	08/28/20
Writing/Designing NSF Proposals	07/16/2017	Meals Per Diem	164005-00 Piedmont Admin.	PIEDMONT	GRANTS ADMINSTRA...	Exported	44.25	44.25	USD	08/28/20
			164005-00							

In this example, the instructions are for the My Expense Approval Items report, as if you would be viewing expense in which you have approved.

Select “My Expense Approval Items”. The reporting data will populate on the right side of the screen.

Follow the same instructions shown on pages 4 & 5.