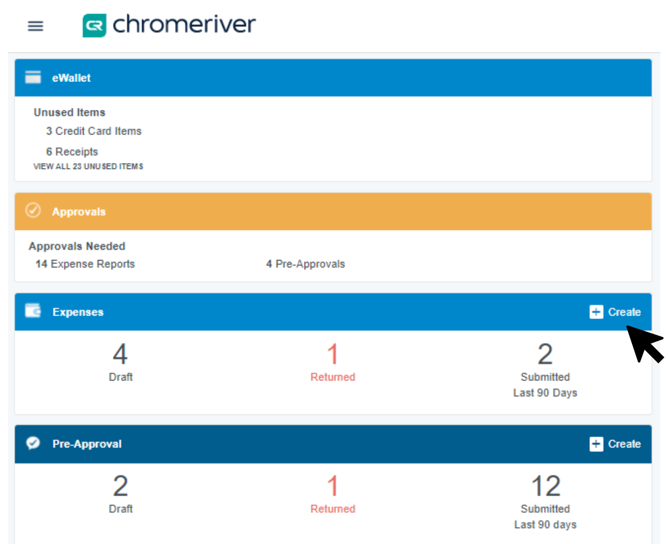
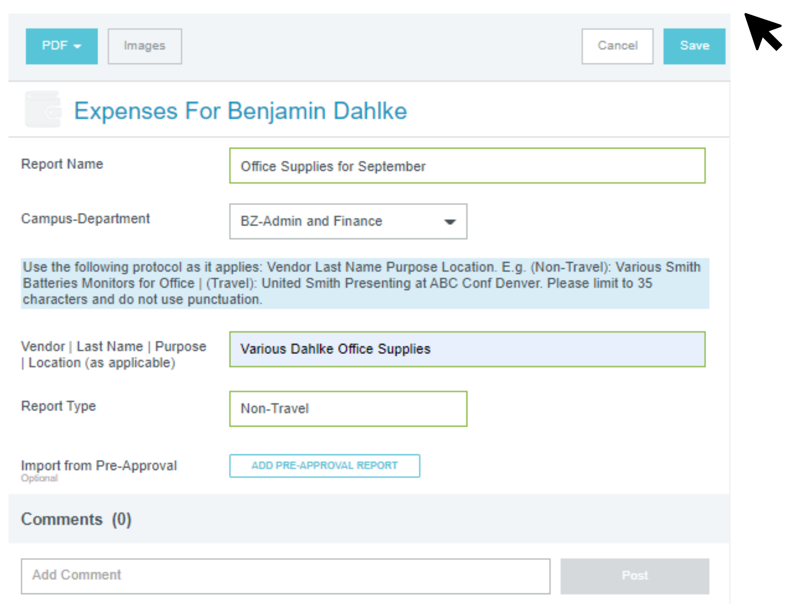
Initial Steps & Header Info

1. Locate a link to Chrome River and login with your NetID and password
    a. Right Here: https://app.ca1.chromeriver.com/login/sso/saml?CompanyID=montana.edu
    b. Link also found at MSU Chrome River Website https://www.montana.edu/chromeriver

2. From the MSU Chrome River Dashboard/ landing page, click **+ Create** in upper right corner of the Expenses notification bar.



3. Enter the Header data:



Report Name: Naming Convention:
General description for report (Lab Purchases for February, CE Dept Office Supplies, etc.)

Campus-Department: From the dropdown menu, select applicable campus/department. All Bozeman campus organizations begin with "BZ."
Select the department that best fits the travel funding.
Example: A Norm Asbjornson College of Engineering faculty member whose travel is backed by a grant within the Center for Biofilm Engineering would choose "BZ-Research-Univ Programs."

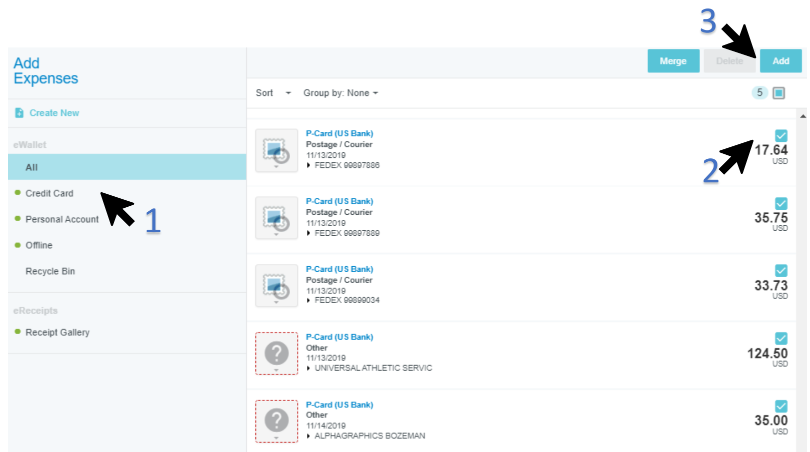
Vendor|Last Name|Purpose|Location: Use the provided protocol as applicable (with no punctuation and limit to 35 characters) for the purchases, or majority of purchases.
You will be able to enter separate entries for each transaction in the report.

Report Type: Select Non-Travel

4. Click **Save** in top right corner of the screen to continue.

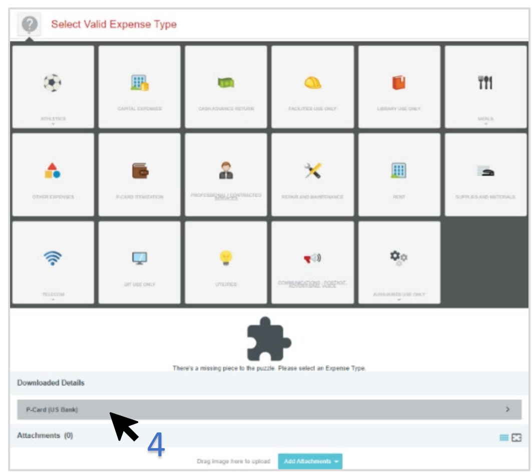
Add Non-Travel P-Card Expenses

5. The Add Expenses screen will appear on the right side of the screen and will show any unprocessed P-Card transactions in your eWallet. Select the transaction(s) you wish to include on this expense report by checking the box(es) on the far right (1) and click **Add** (2) to add them to the Expense Report.



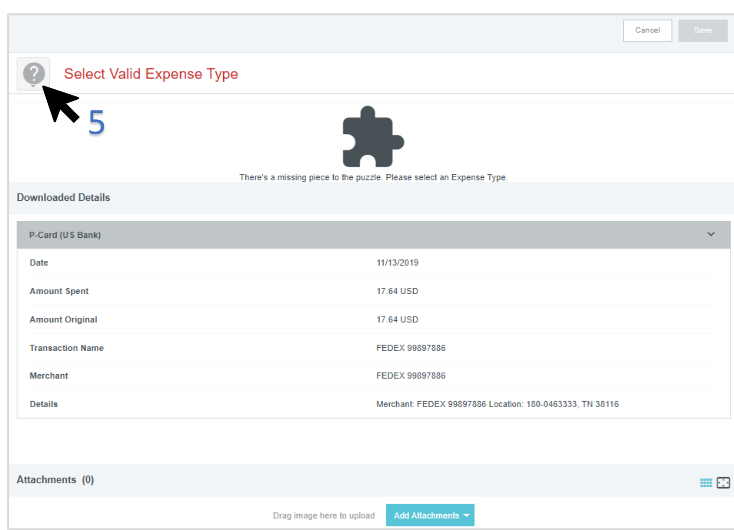
6. The Select Expense Tile page will appear… But the details of the transaction will not.

To see the transaction details, click the gray "P-Card (US Bank)" bar (4)

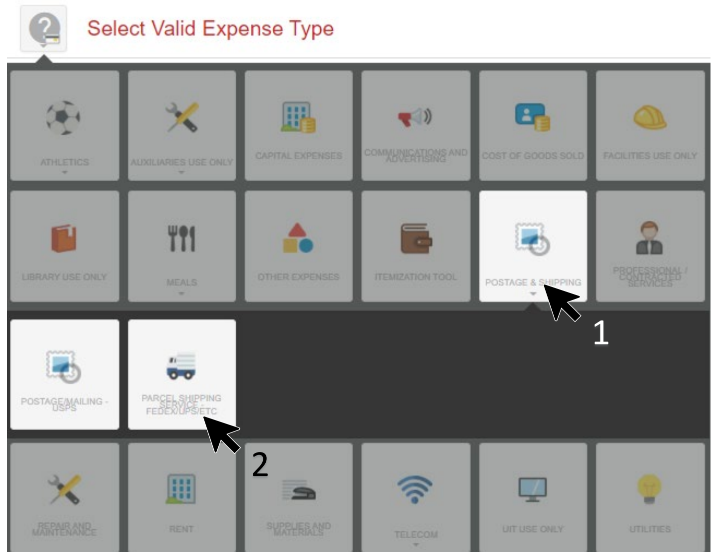


7. The transactions will appear… But the expense tiles will disappear!

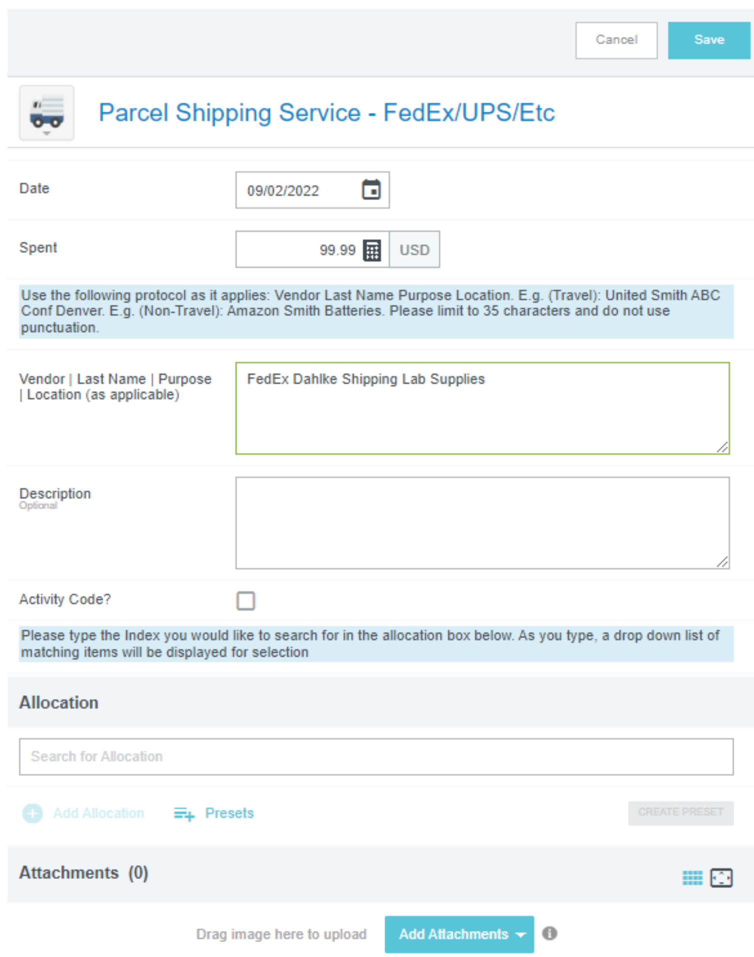
To see finally see both transaction details *and* the expense tiles, click the gray question mark (5)



8. Now that you can see both the tiles and the transaction details, you can select tile that matches the expense—in this example, a FEDEX transaction is categorized in the “Postage & Mailing” folder (1) and “Parcel & Shipping” tile (2)
If you are unsure, here is a neat tool to help: [Expense Category Tool]



9. Complete the Expense Tile Form.



Date & Spent: Auto-filled

Vendor|Last Name|Purpose|Location: This field will default with the information entered on the report header but can be modified on any of the expense forms. Follow instructions in the blue note above the field to concisely describe the expense.

⚠ Only the first 35 characters of this field transfer to the system of record. If you need additional characters to describe the expense, please use the Description field.

Description: Provide any additional info about this expense. This field is optional for most expense types.

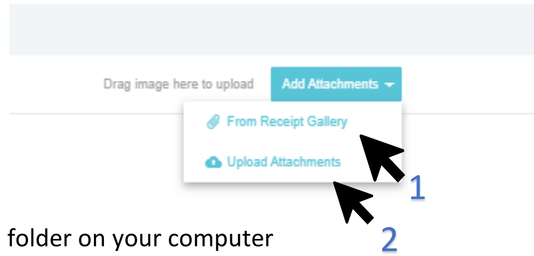
Account Code: (if present) From the dropdown menu, select the appropriate account code. If you are unsure, you can use the [Expense Category Tool] to help.

Activity Code: (optional) If there is an associated activity code for this expense (not common), check the box and select the appropriate code from the dropdown menu. Place the cursor in the Activity Code field and type to search for appropriate code. You may search by code or keyword.

Allocation: Place the cursor in the Search for Allocation field and type to search for appropriate funding index. You may search by index number or keyword. Example: type “LRES” to see all indices with LRES in the title/description. If you need to add an additional index for a split allocation, click the + Add Allocation link.

Downloaded Details: If desired, click the gray bar labeled “P-Card (US Bank)” to reveal transaction details.

Attachments: You may add attachments several different ways:



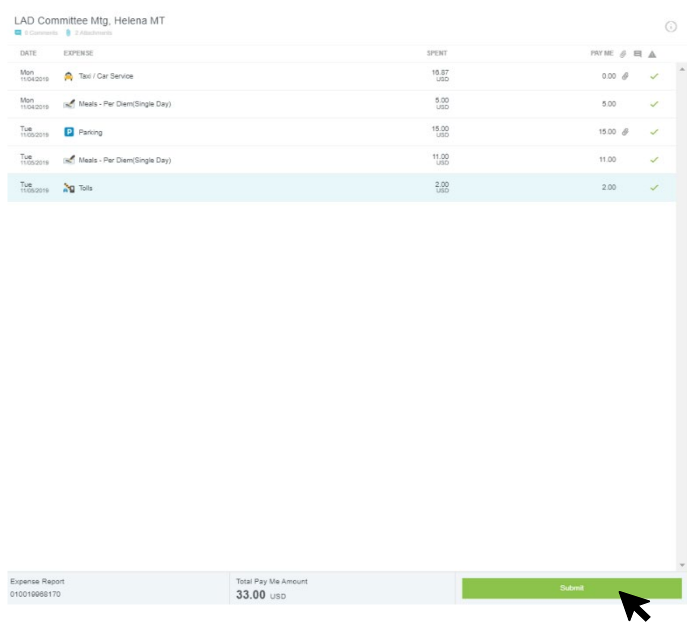
- Click Add Attachments button and select **From Receipt Gallery** (1)
  Your Receipt Gallery will appear on right side of screen and you may check to add the applicable receipt that you previously uploaded
- Click Add Attachments button and select **Upload Attachments** (2)
  A system window will pop up and you can select your receipt file from a folder on your computer
- From Windows folder, drag and drop receipt file anywhere on Expense Tile Form (right side of Chrome River window)

  See CR Help Guide “Upload & Attach Receipts” for more details, if needed.

10. Click **Save** at the top right corner to
   1) continue adding P-card transactions (repeat steps 6-9) or
   2) continue to submit process (go to step 11)

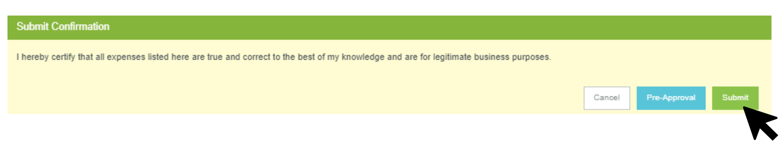
Submit the Report

When you have completed all the entries for the Expense Report, to include attaching all receipts/documentation and clearing any other warnings, you are ready to submit!



11. Click the **Submit** button located at the bottom of the screen.

12. A submit confirmation will appear at the top of the right side of the screen.



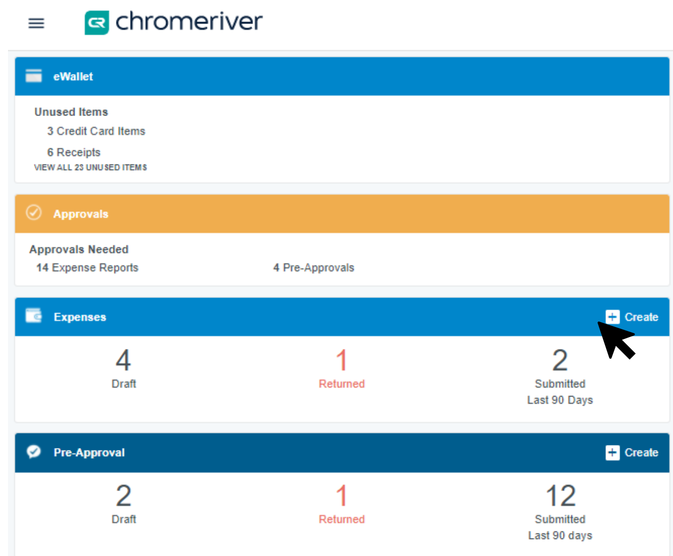
Submit: Once you have read the certification statement, click the **Submit** button to submit the Expense Report into workflow for review/approvals.

Cancel: Clicking cancel allows you to return to the Expense Report to make any needed changes. You can choose to leave the report in draft status--your Expense Report automatically saves as you create it, and you can come back to it anytime.

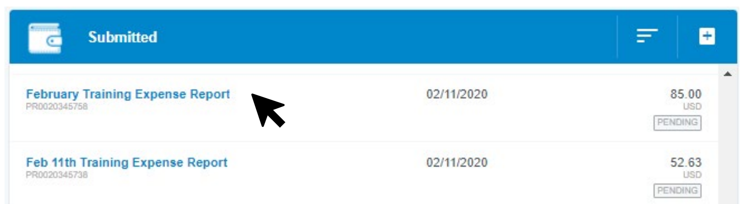
Recall the Report

If you wish to recall your Expense Report to make edits, you can do so prior to final approval.

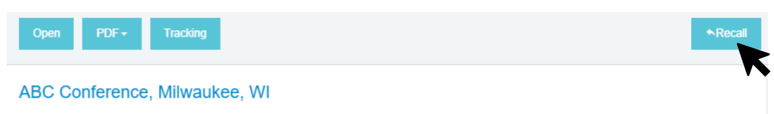
1. From the Dashboard, under the Expenses notification bar, click the box indicating the number of expense reports **Submitted in Last 90 Days**.



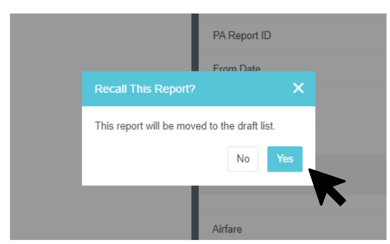
2. Single-Click on the desired report from the list that appears on left side of screen.



3. Click the **Recall** button in top right corner of the screen.



4. Confirm the recall to your draft list to recall the Expense Report.



5. Select the CR Logo to Return to the Dashboard or the 3-Line Menu for more options.