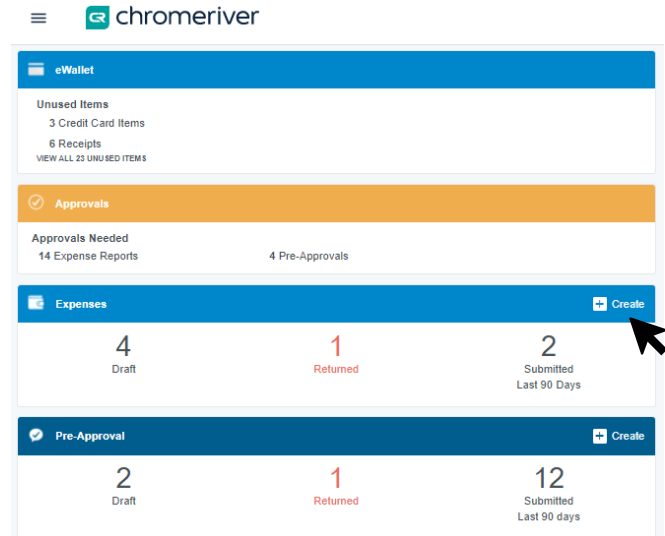


Initial Steps & Header Info

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.



The screenshot shows the Chrome River dashboard. At the top, there's a navigation bar with a hamburger menu and the 'chromeriver' logo. Below this, there are several sections: 'eWallet' with 'Unused Items' (3 Credit Card Items, 6 Receipts), 'Approvals' with 'Approvals Needed' (14 Expense Reports, 4 Pre-Approvals), 'Expenses' with a 'Create' button highlighted by a red arrow, and 'Pre-Approval' with a 'Create' button. The 'Expenses' section shows 4 Draft, 1 Returned, and 2 Submitted (Last 90 Days) items. The 'Pre-Approval' section shows 2 Draft, 1 Returned, and 12 Submitted (Last 90 Days) items.

3. Enter the Header data:

Report Name: Naming Convention:

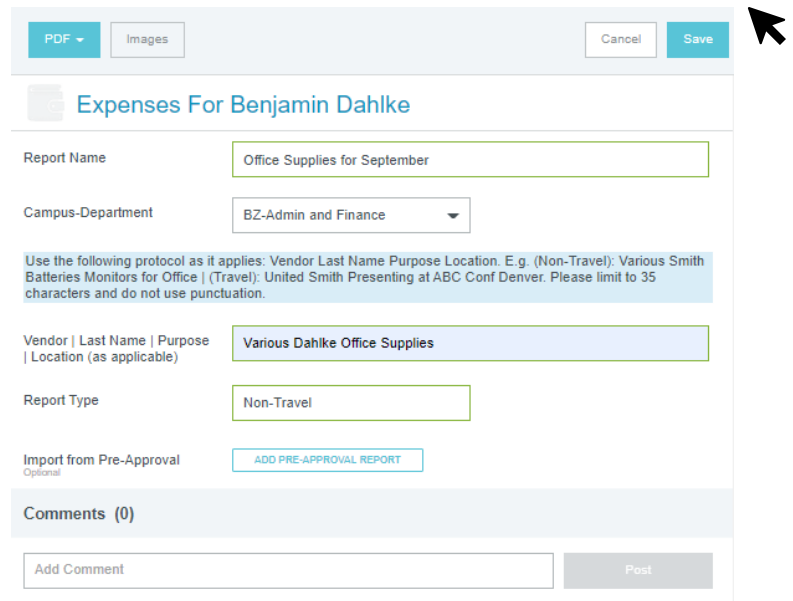
General description for report (Lab Purchases for February, CE Dept Office Supplies, etc.)

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

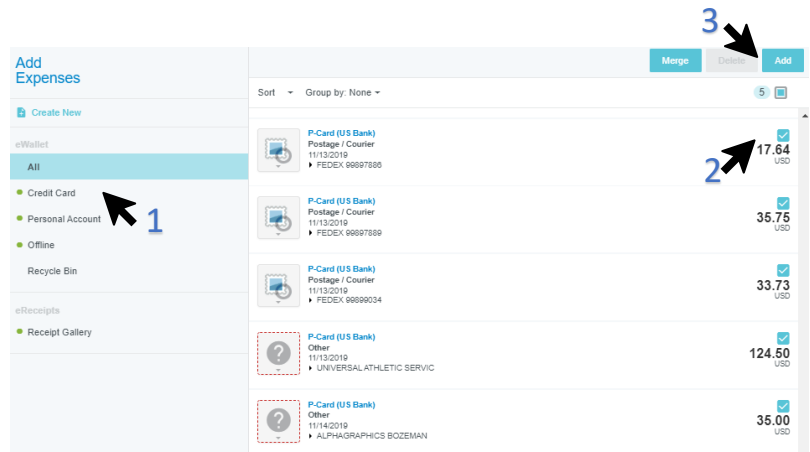


The screenshot shows the 'Expenses For Benjamin Dahlke' form. At the top, there are buttons for 'PDF', 'Images', 'Cancel', and 'Save'. The form fields are: 'Report Name' (Office Supplies for September), 'Campus-Department' (BZ-Admin and Finance), 'Vendor | Last Name | Purpose | Location (as applicable)' (Various Dahlke Office Supplies), 'Report Type' (Non-Travel), and 'Import from Pre-Approval' (ADD PRE-APPROVAL REPORT). There is a 'Comments (0)' section at the bottom with an 'Add Comment' field and a 'Post' button.

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

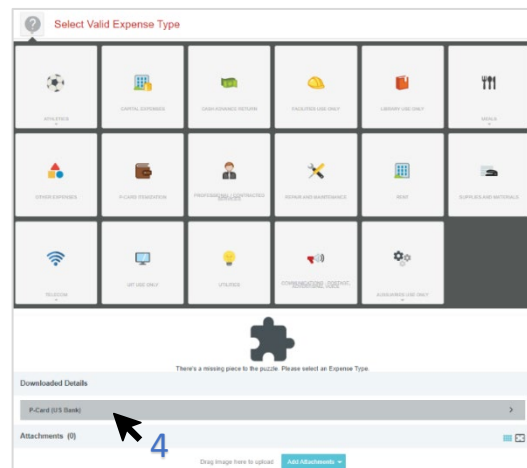
Add Non-Travel P-Card Expenses

- 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.



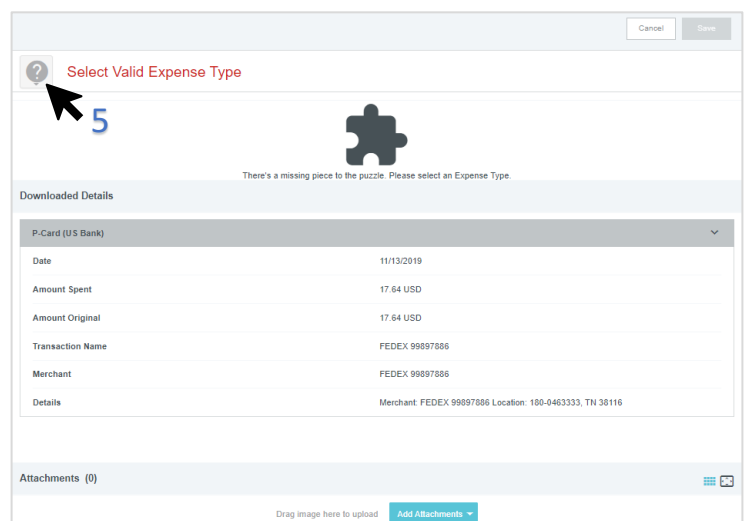
- The Select Expense Tile page will appear... But the details of the transaction will not.

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

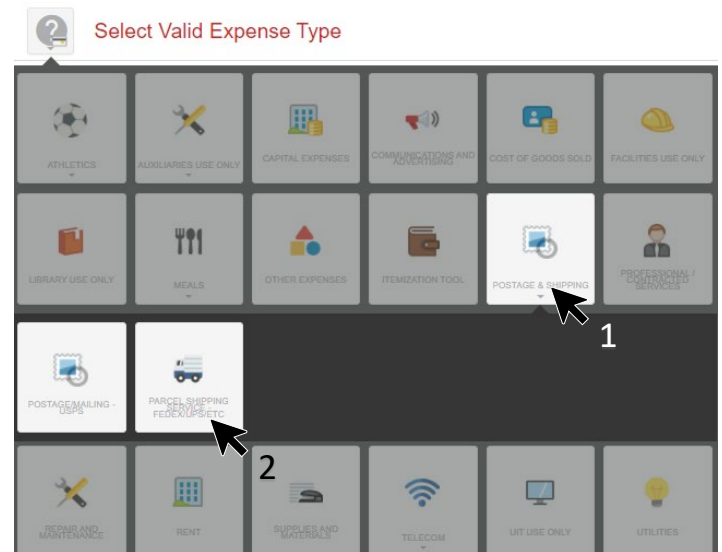


- The transactions will appear... But the expense tiles will disappear!

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.


Parcel Shipping Service - FedEx/UPS/Etc

Date: 09/02/2022

Spent: 99.99 USD

Use the following protocol as it applies: Vendor Last Name Purpose Location. E.g. (Travel): United Smith ABC Conf Denver. E.g. (Non-Travel): Amazon Smith Batteries. Please limit to 35 characters and do not use punctuation.

Vendor | Last Name | Purpose | Location (as applicable): FedEx Dahlke Shipping Lab Supplies

Description (Optional):

Activity Code? ☐

Please type the Index you would like to search for in the allocation box below. As you type, a drop down list of matching items will be displayed for selection

Allocation

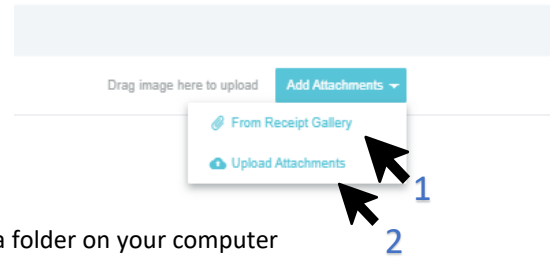
Search for Allocation

Attachments (0)

Drag image here to upload

Attachments: You may add attachments several different ways:

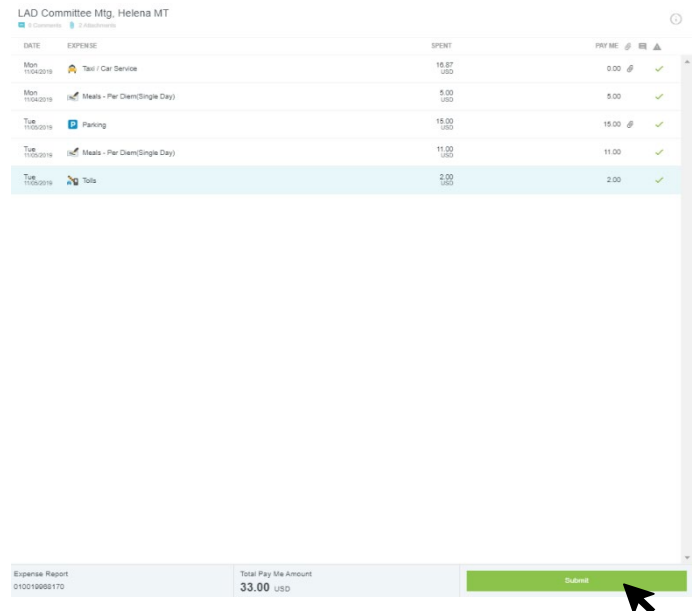
- Click Add Attachments button and select **From Receipt Gallery** (1)
Your Receipt Gallery will appear on right side of screen and you may check to add the applicable receipt that you previously uploaded
 - Click Add Attachments button and select **Upload Attachments** (2)
A system window will pop up 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!



DATE	EXPENSE	SPENT	PAY ME
Mon 11/04/2016	Taxi / Car Service	15.00 USD	0.00
Mon 11/04/2016	Meals - Per Diem(Single Day)	5.00 USD	5.00
Tue 11/05/2016	Parking	15.00 USD	15.00
Tue 11/05/2016	Meals - Per Diem(Single Day)	11.00 USD	11.00
Tue 11/05/2016	Tolls	2.00 USD	2.00

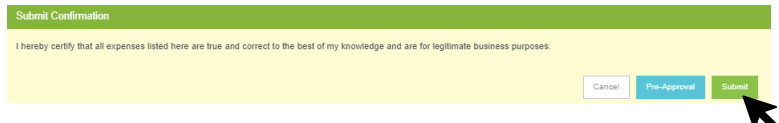
Expense Report: 010019688170 Total Pay for Amount: 33.00 USD **Submit**

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.



Submit Confirmation

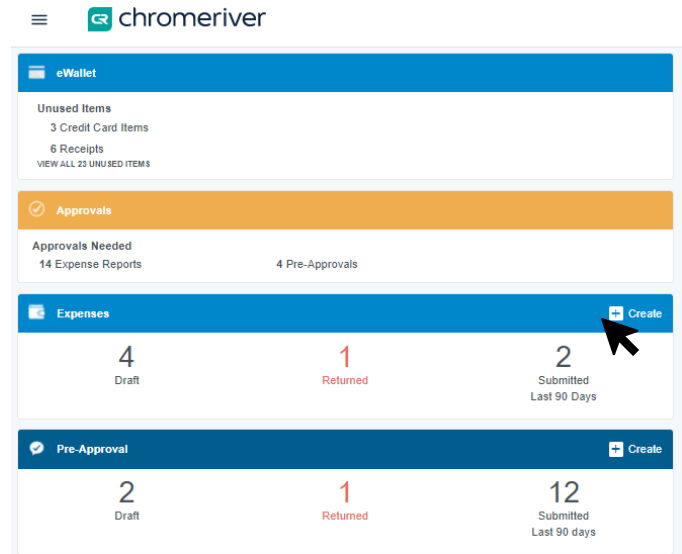
I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.

Cancel **Pre-Approval** **Submit**

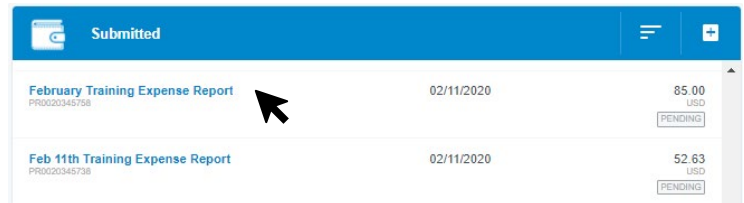
Recall the Report

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

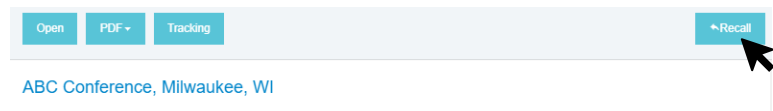
1. From the Dashboard, under the Expenses notification bar, click the box indicating the number of expense reports **Submitted in Last 90 Days**.



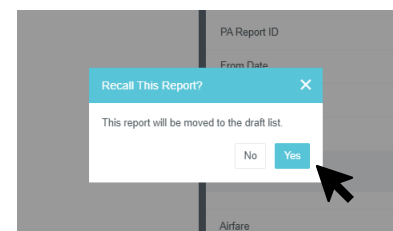
2. Single-Click on the desired report from the list that appears on left side of screen.



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.

