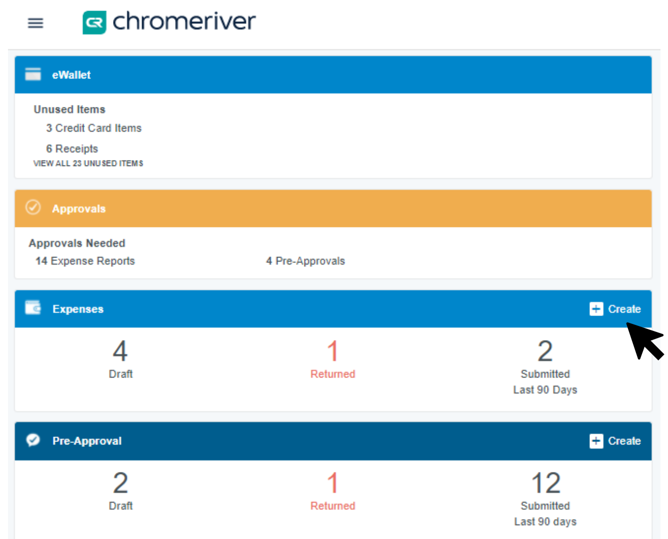
Initial Steps & Header Info

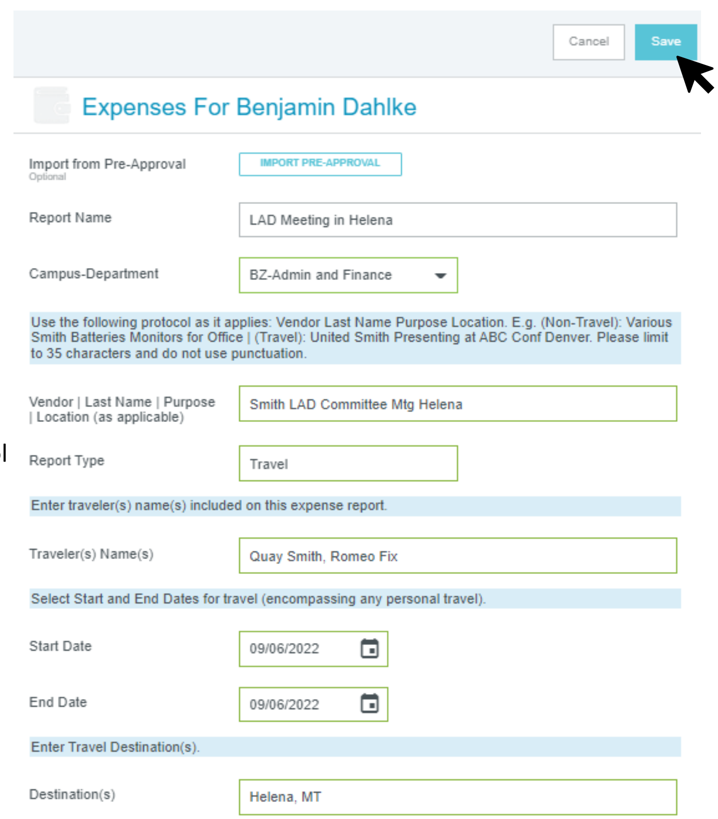
1. Locate a link to Chrome River and login with your NetID and password
   a. Right Here: https://app.ca1.chromeriver.com/login/sso/saml?CompanyID=montana.edu
   b. Link also found at MSU Chrome River Website https://www.montana.edu/chromeriver

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



> Pre-Approvals are required to be attached to all out-of-state and international travel expense reports.
> Pre-Approvals are also required to receive a cash advance or to request actual cost lodging (including in-state). If you have a fully approved Pre-Approval in the system, see CR Help Guide for "Create Travel Expense Report (Pre-Approval Import)."

3. Enter the Header data:



Report Name: Naming convention up to traveler: Reason for Travel (Meeting or Conference Name, Site Visit, etc); Location. *Example*: ABC Conference, Milwaukee, WI

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.

Report Type: Select Travel

Traveler(s) Name(s): Enter all travelers who are included in this expense report (i.e. if this p-card holder bought plane tickets for another traveler both names should be entered here).

Start Date: Actual departure date

End Date: Actual return date

Destination(s): Include all destinations; City and State or Country

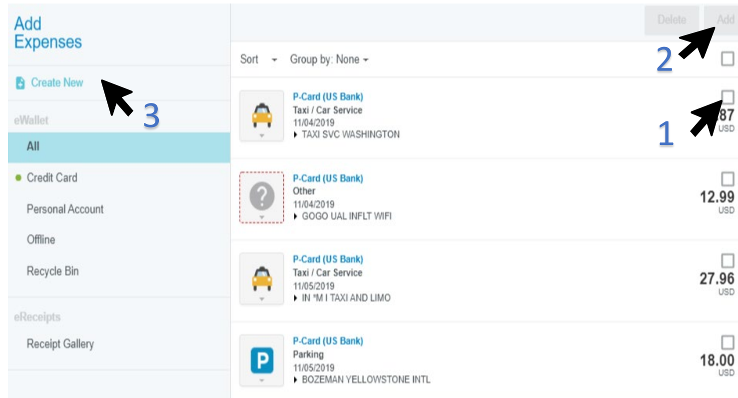
Click here if this trip will include personal days: Leave the box blank if there will not be personal time included in this travel event. Check the box if there will be personal time included and select dates in the pop-in fields as applicable.

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

Add Expenses (Pre-Approval not imported)

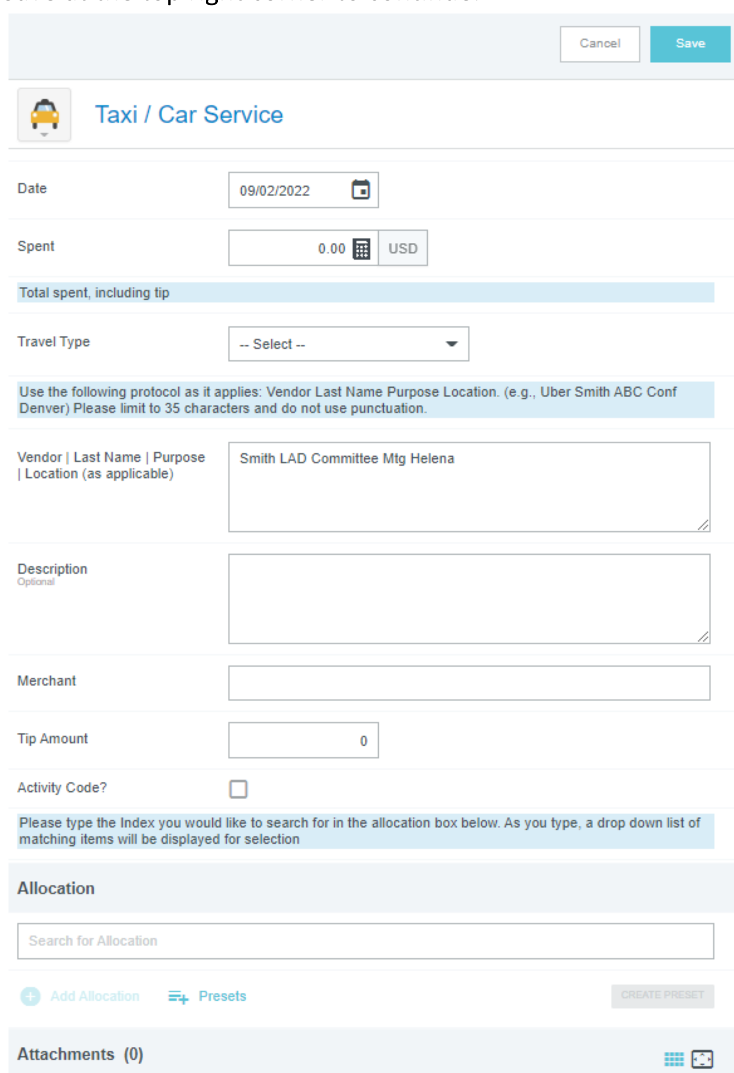
5. The Add Expenses screen will appear on the right side of the screen and will show any unprocessed P-Card transactions in your eWallet. If any of these transactions are associated with this travel event, check the box(es) on the far right (1) and click **Add** (2) to add them to the Expense Report—go to step 6.a.

   If not, click the **Create New** box in the upper left of the Add Expenses screen (3)—go to step 6.b.



6.a. P-Card transaction(s)

Complete the Expense Tile Form and when complete, click Save at the top right corner to continue.



Date / Spent: Auto-filled, includes any tip charged to card, as applicable.

Travel Type: Select appropriate location/type of expense: In State, Out of State, International, or Non-Employee

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.

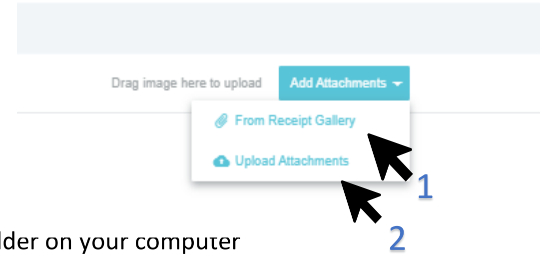
Tip Amount: (If present/applicable) Type tip amount charged to card. If you gave a cash tip, do not place that amount here—create 2nd expense (same expense type) with "cash tip" in business purpose/description.

Activity Code: If there is an associated activity code for this travel event, 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:

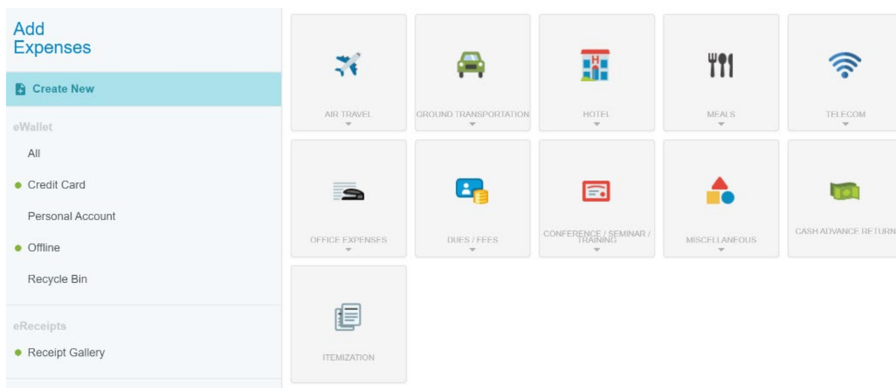


- Click Add Attachments button and select **From Receipt Gallery** (1)
  Your Receipt Gallery will appear on right side of screen and you may check to add the applicable receipt that you previously uploaded
- Click Add Attachments button and select **Upload Attachments** (2)
  A system window will pop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

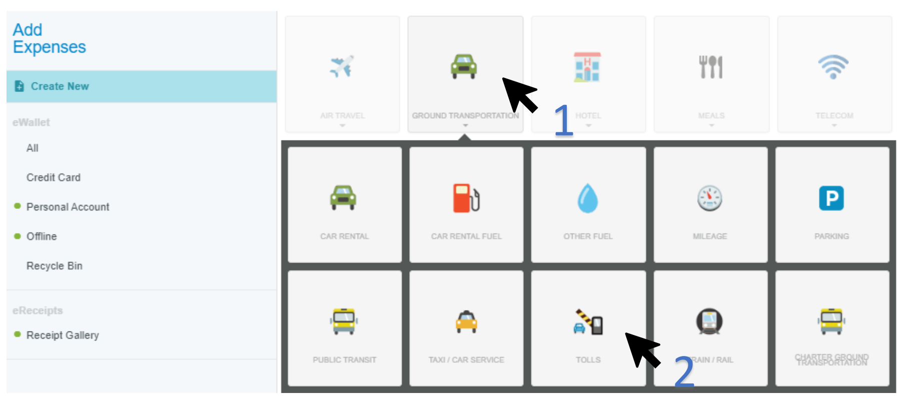
  See CR Help Guide "Upload & Attach Receipts" for more details, if needed.

Remember to click **Save** at the top right corner to
1) continue adding P-card transactions (repeat step 6.a.) or
2) add Non P-card Expenses (go to step 6.b.) or
3) continue to submit process (go to step 7)

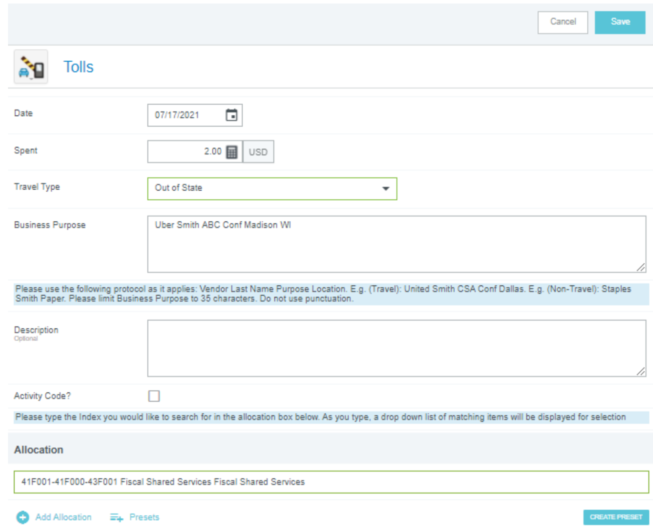
6.b. Non-P-Card transaction(s)
After clicking **Create New**, the Add Expenses page with expense tiles will appear on the right side of the screen.



Select the specific expense tile you want to add to the Expense Report.



Complete the Expense Tile Form and when complete, click Save at the top right corner to continue.



Date: Enter actual date of expense

Spent: Enter amount of expense

Travel Type: Select appropriate location/type of expense: In State, Out of State, International, or Non-Employee

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.

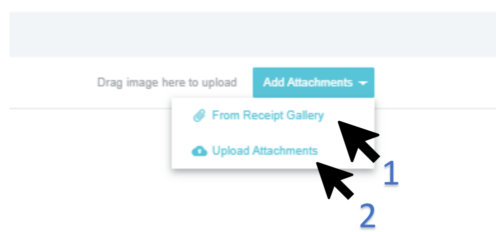
Tip Amount: (If present/applicable) Type tip amount charged to card. If you gave a cash tip, do not place that amount here—create 2nd expense (same expense type) with “cash tip” in business purpose/description.

Activity Code: (optional, not common) If there is an associated activity code for this travel event, 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.
Once a funding option has been selected, Chrome River will carry the funding information to each subsequent expense added to the report—it can be modified if split funding is required.

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:



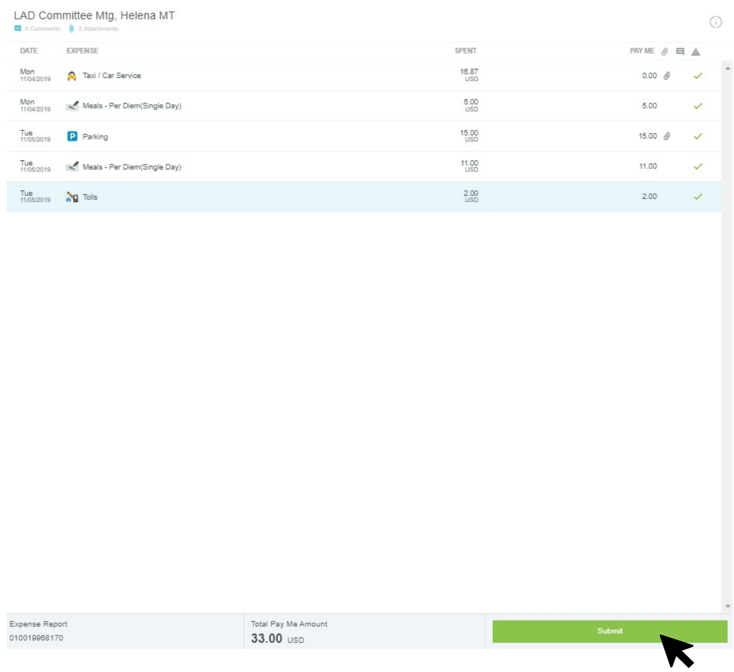
- Click Add Attachments button and select **From Receipt Gallery** (1)
  Your Receipt Gallery will appear on right side of screen and you may check to add the applicable receipt that you previously uploaded
- Click Add Attachments button and select **Upload Attachments** (2)
  A system window will pop 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 “Upload & Attach Receipts” for more details, if needed.

Remember to click **Save** at the top right corner to
1) continue adding P-card transactions (repeat step 6.a.) or
2) add Non P-card Expenses (repeat step 6.b.) or
3) continue to submit process (go to step 7)

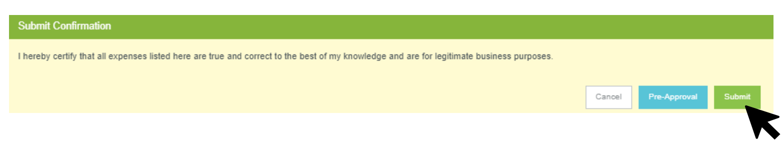
Submit the Report

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!



7. Click the **Submit** button located at the bottom of the left side of the screen.

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



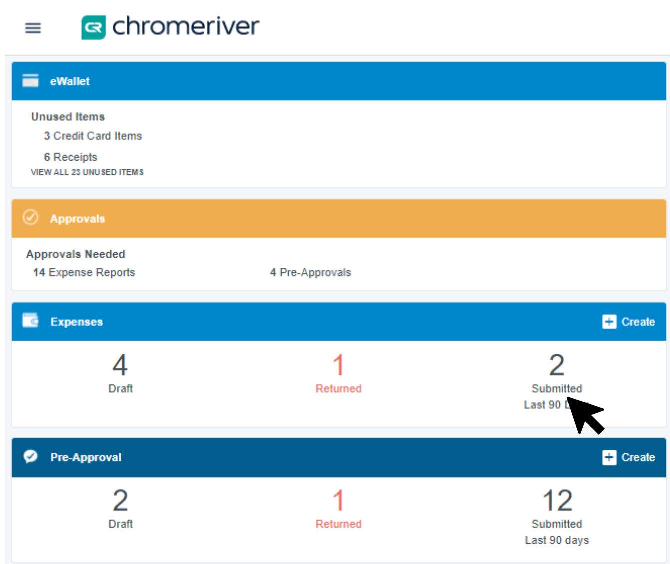
Submit: Once you have read the certification statement, click the **Submit** button to submit the Expense Report into workflow for review/approvals.

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.

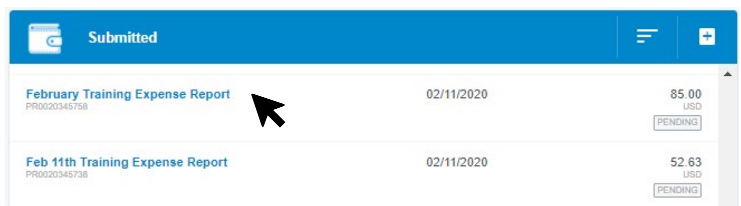
Recall the Report

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

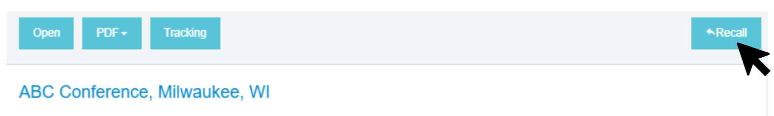
1. From the Dashboard, under the Expenses notification bar, click the box indicating the number of expense reports **Submitted in Last 90 Days**.



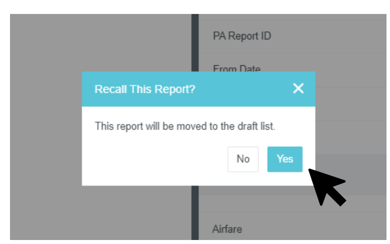
2. Single-Click on the desired report from the list that appears on left side of screen.



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.