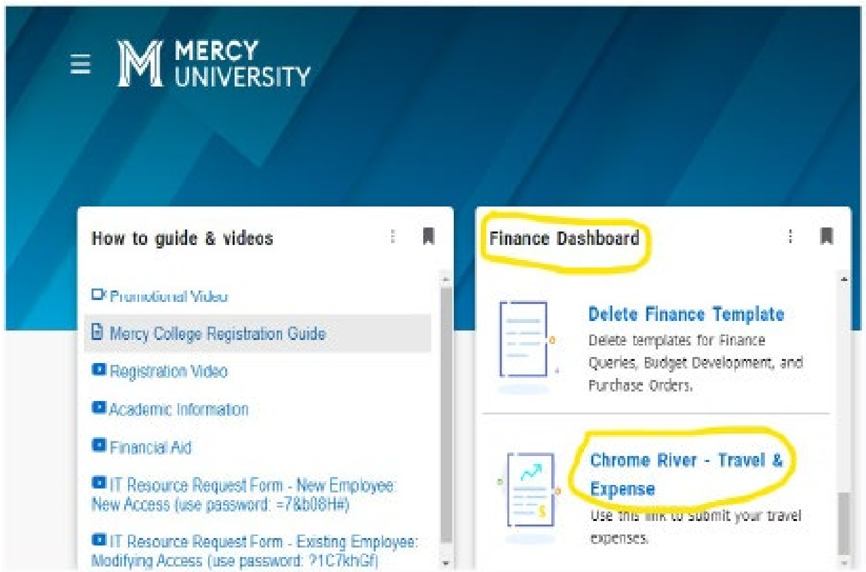
CHROME RIVER TRAINING GUIDE FOR

MERCY UNIVERSITY

This document will show you our report types, how to set up an expense report, and how to reconcile your credit card statement. If you need more help, you can also find links on the Finance dashboard.

GO TO MERCY CONNECT, GO ON THE FINANCE DASHBOARD, AND SCROLL DOWN UNTIL YOU SEE CHROME RIVER – TRAVEL & EXPENSE



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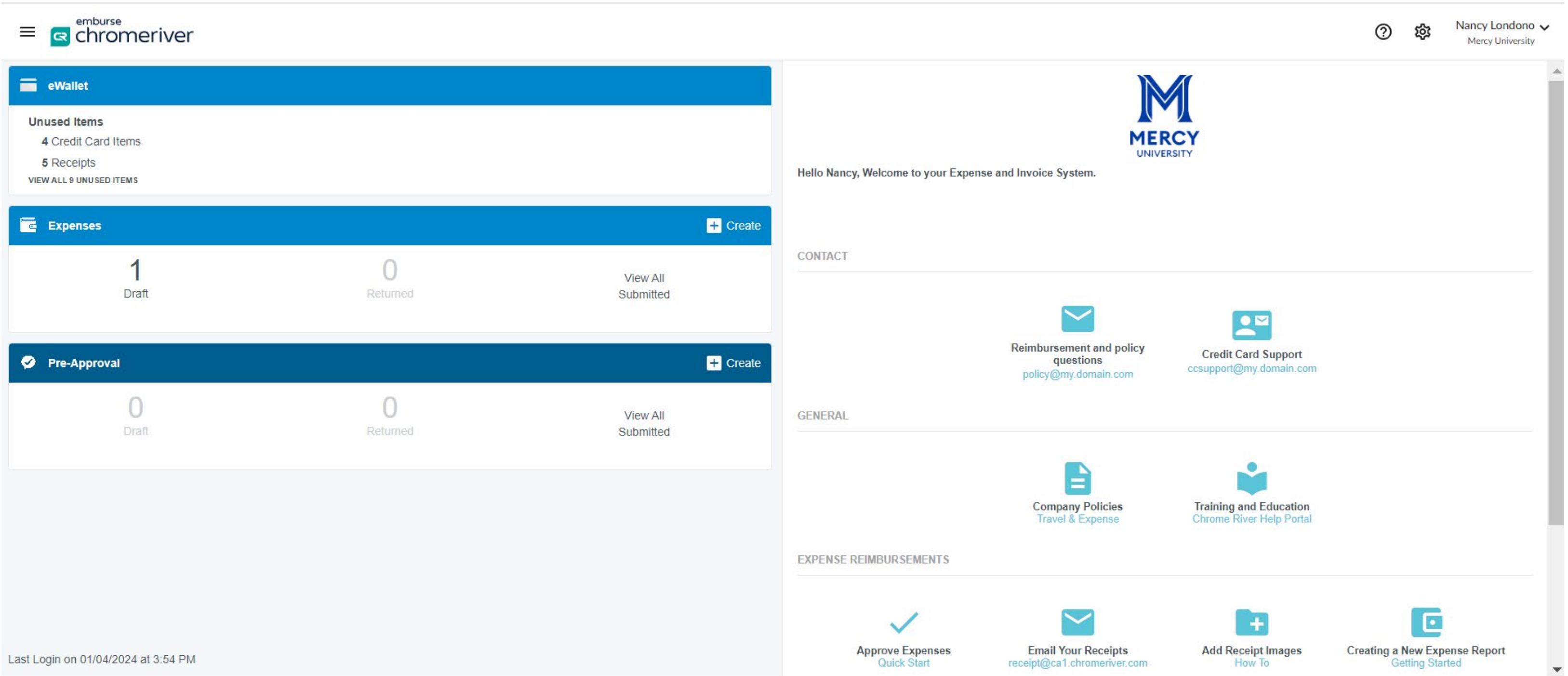


Chrome River is accessed through Quick Links using your Single Sign On credentials.

Before you get started:

**Please make sure your receipts are loaded into Chrome River for easier creation of Expense Reports. You can email a photo of the receipt to receipt@ca1.chromeriver.com, or you can log into the Chrome River app and take a picture of the receipt or load from your photo album. You can find the Chrome River app in the App Store or Play Store. See How to take a photo of a receipt from your phone app.

Receipt Upload Requirements

Follow these requirements when uploading and attaching receipts in Chrome River.

Do not combine receipts from multiple transactions.

Each transaction must have its own separate receipt image or PDF attached to it.

1. **Upload receipts separately**
   Do not scan, photograph, or save receipts for different transactions together in one file.

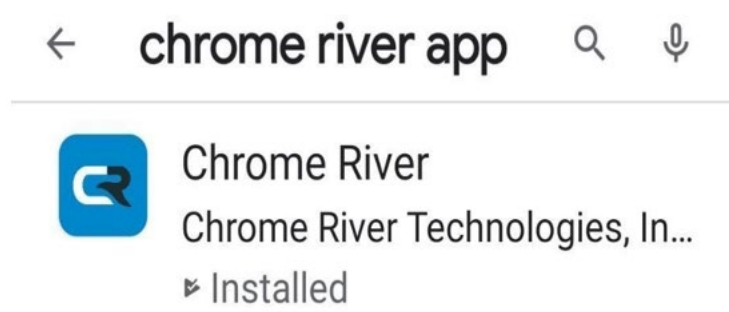
2. **Match each receipt to its transaction**
   Attach the receipt only to the corresponding charge or out-of-pocket expense in Chrome River.

3. **Keep one transaction together**
   If a single receipt has multiple pages, those pages may be combined into one file for that transaction.

4. **Check before submitting**
   Confirm that every receipt is legible, complete, itemized, and attached to the correct expense.

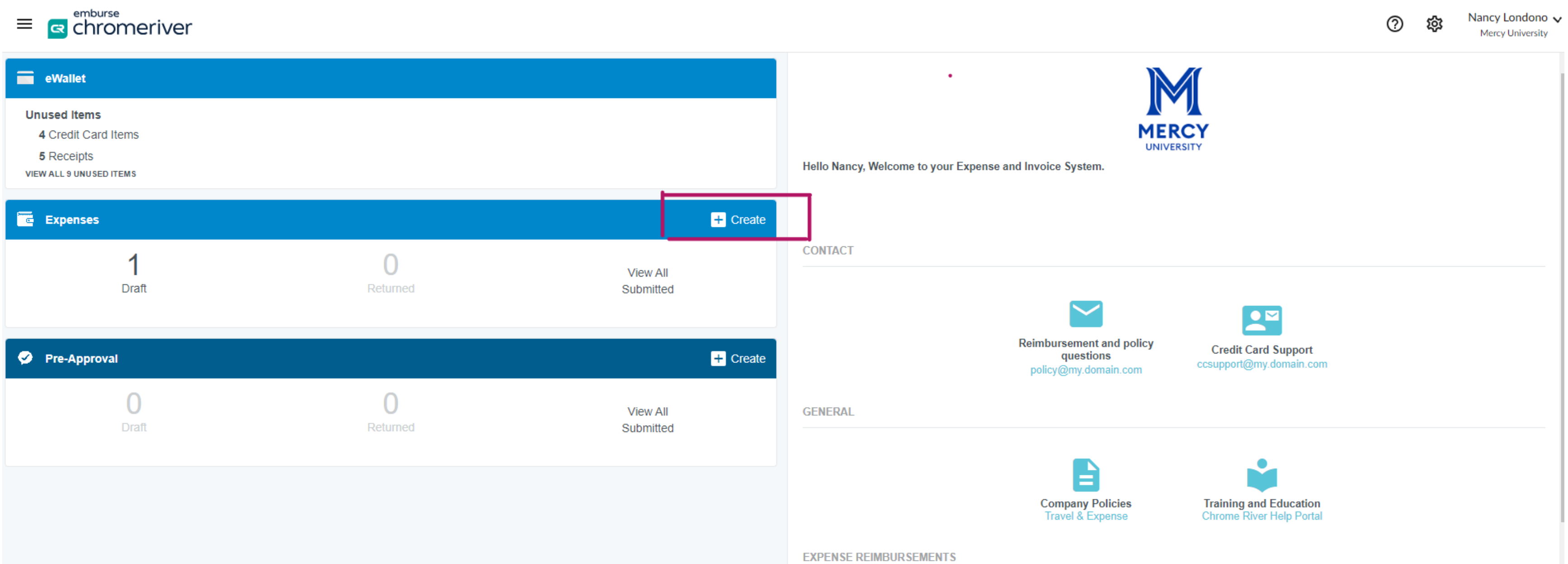
Apple Store

Google Play Store

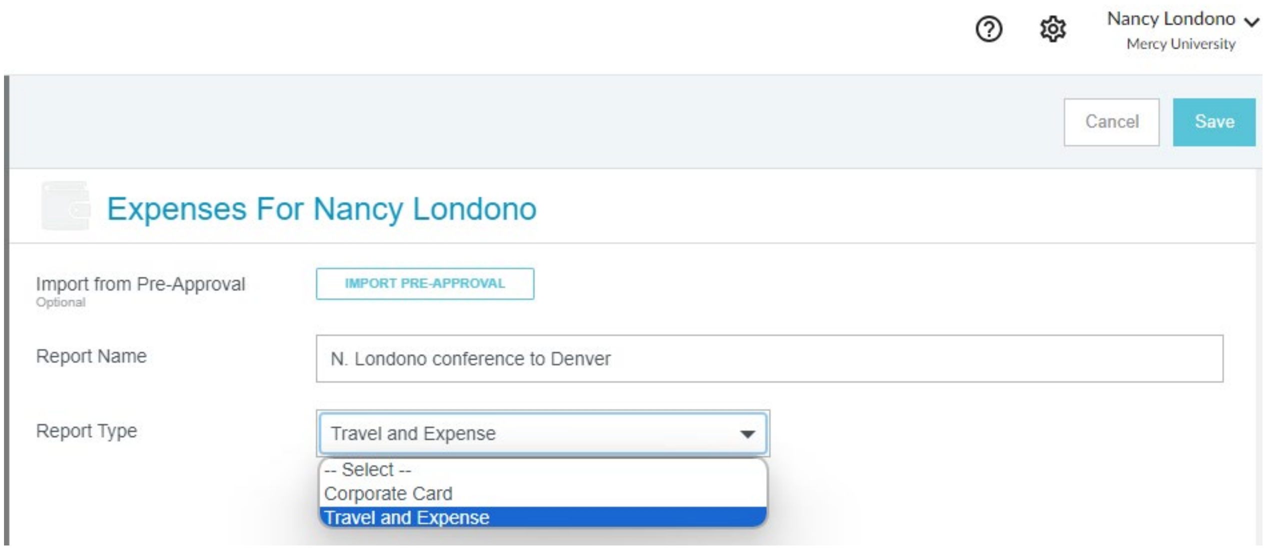


NOTE: The first time you log into the phone app or computer you will be asked to enter a verification number that will be sent to your Mercy University email address.

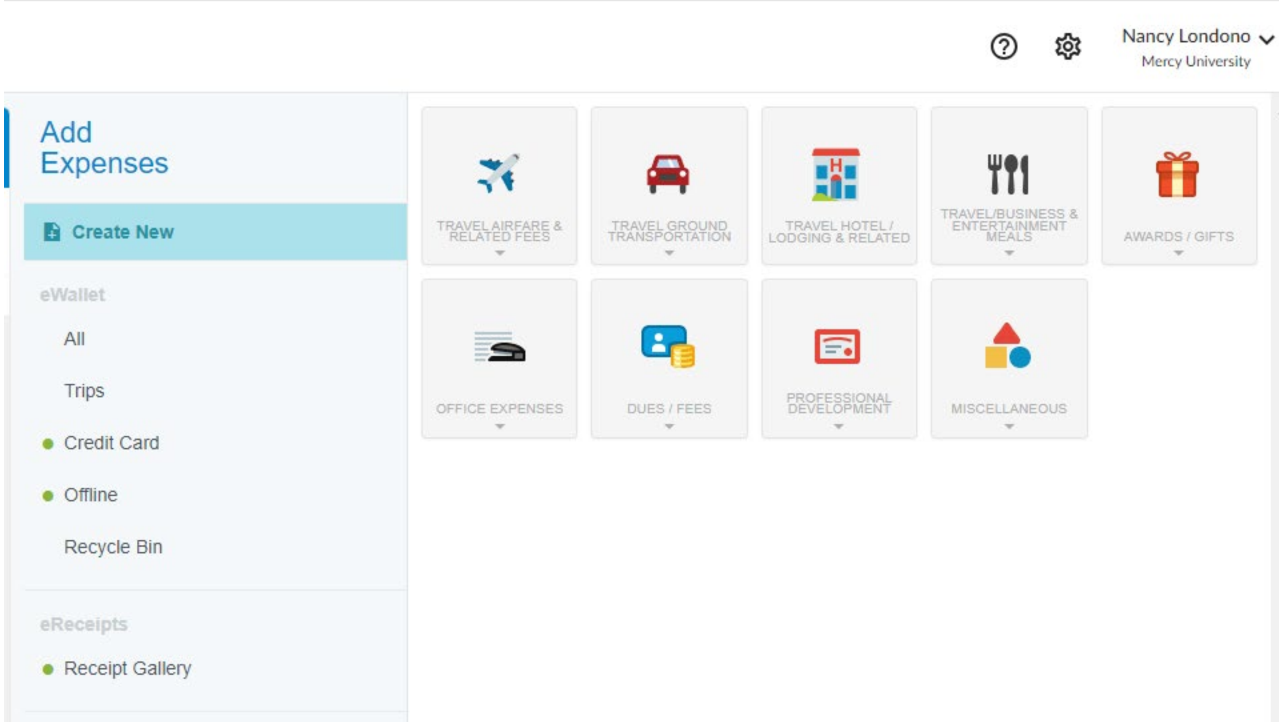
1. To create an Expense Report, you will select **+Create**.



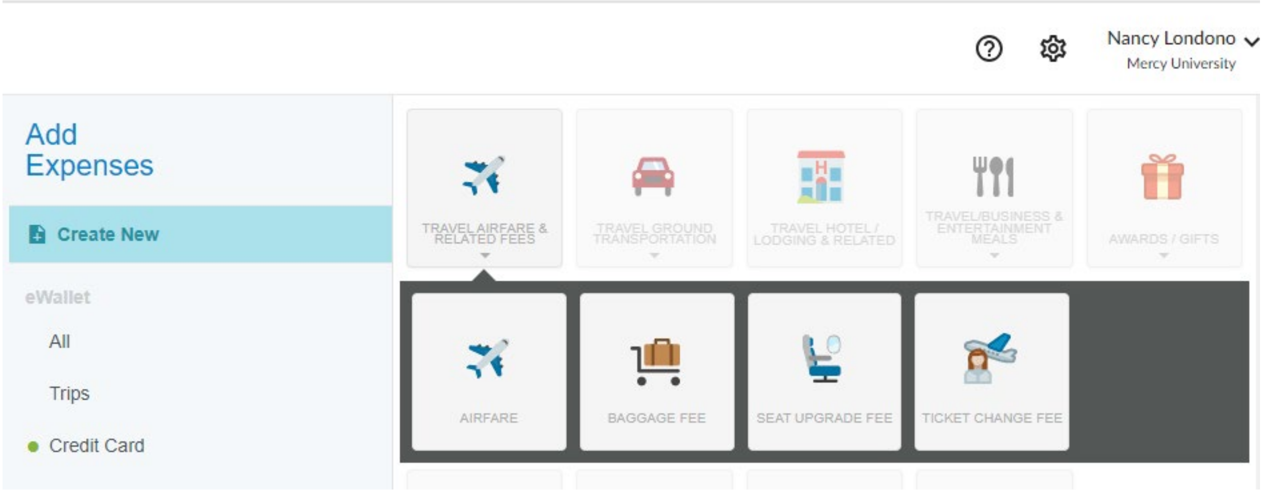
a. The Report Types are:
    i. Corporate Card
    ii. Travel and Expense
b. Make sure to complete all sections of the Expense Report header. **Save**.



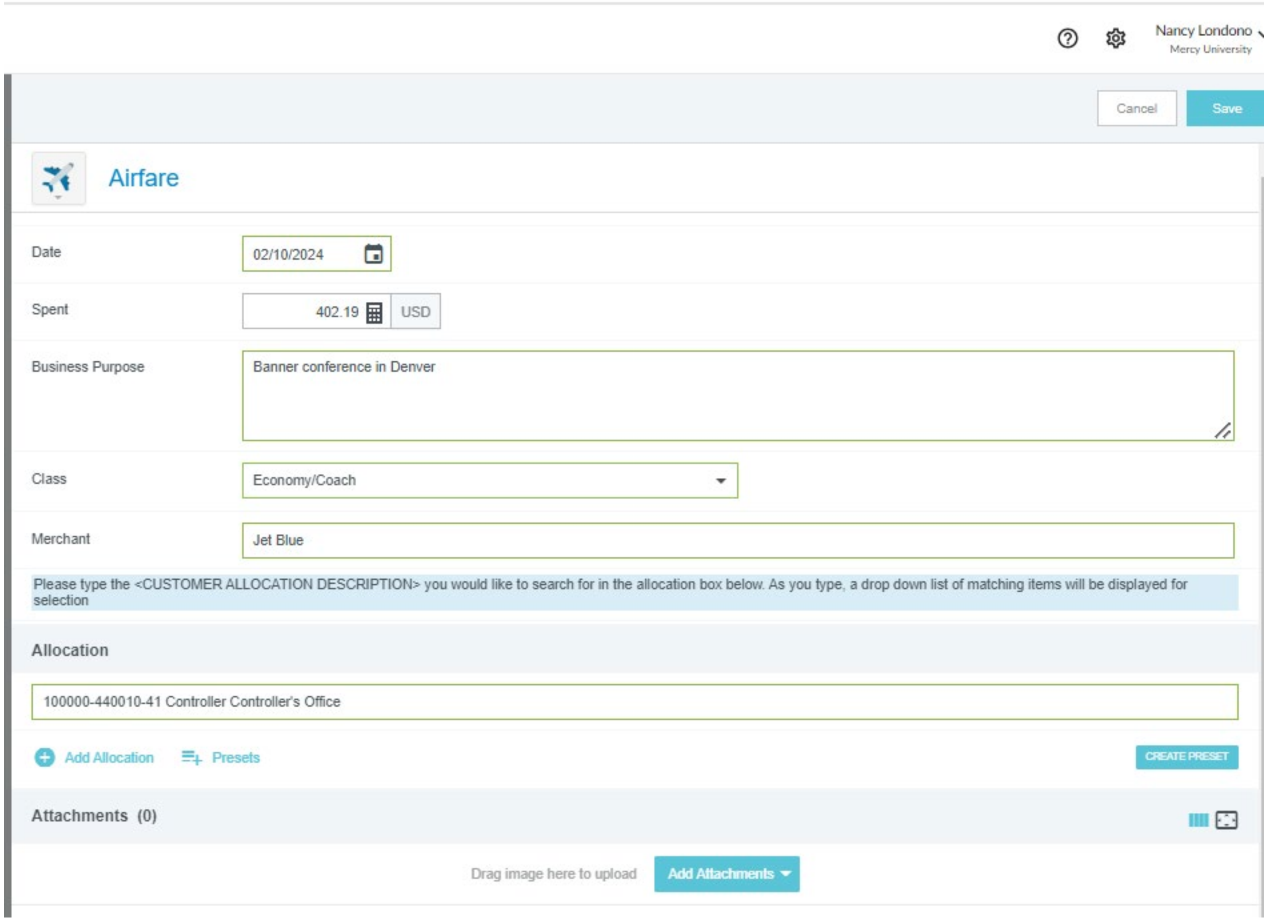
2. Add Expenses to your Expense Report. If the Expense is an out-of-pocket expense, you will use **Create New** and manually add in the amount that is reimbursable.



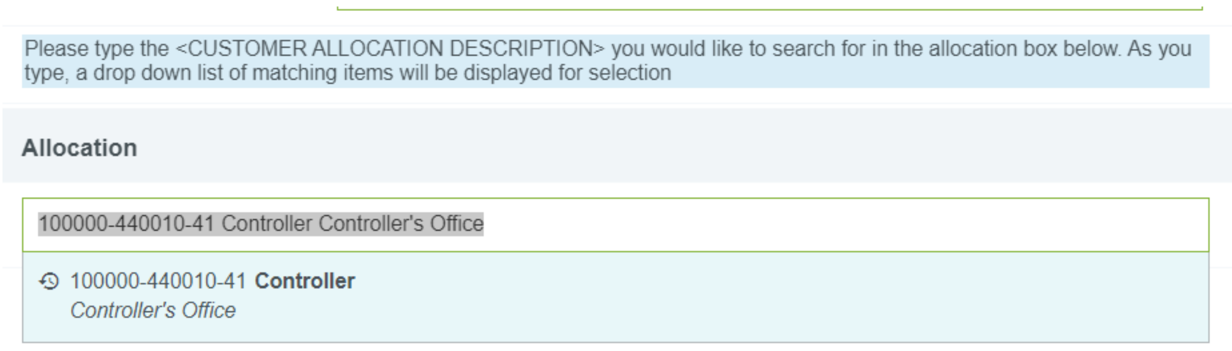
Keep in mind that the tiles with the down arrow have multiple expense types under the primary tile. Travel Airfare& Related Fees is an example below:



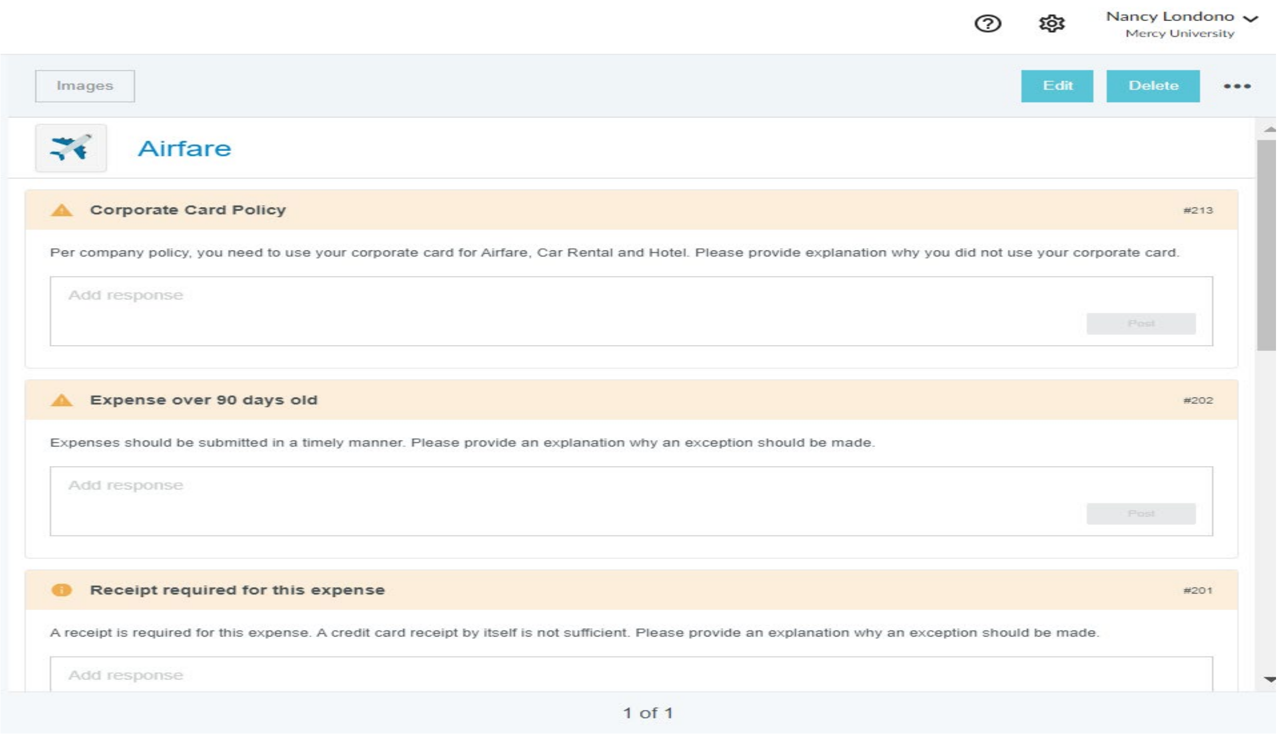
3. For the airfare expense type, you will enter the expense from the airline that are reimbursable to you.



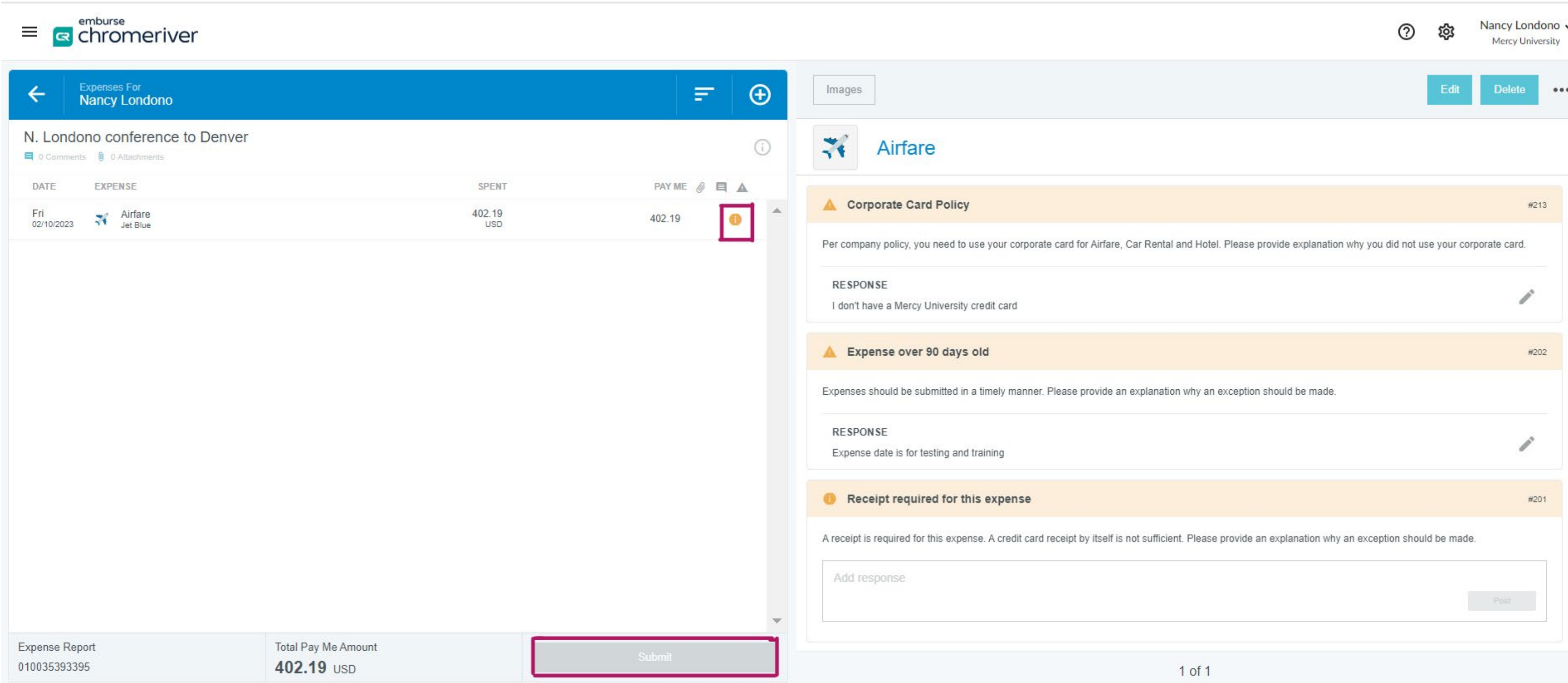
4. Make sure to select an allocation for your Fund/Org. - by tapping on the allocation bar and typing the org code or name. All funds including grant funds have been loaded into the database. For Travel Expenses the tile is mapped to the Account Code. It is possible to split between other Fund/Org's by dollar amount.



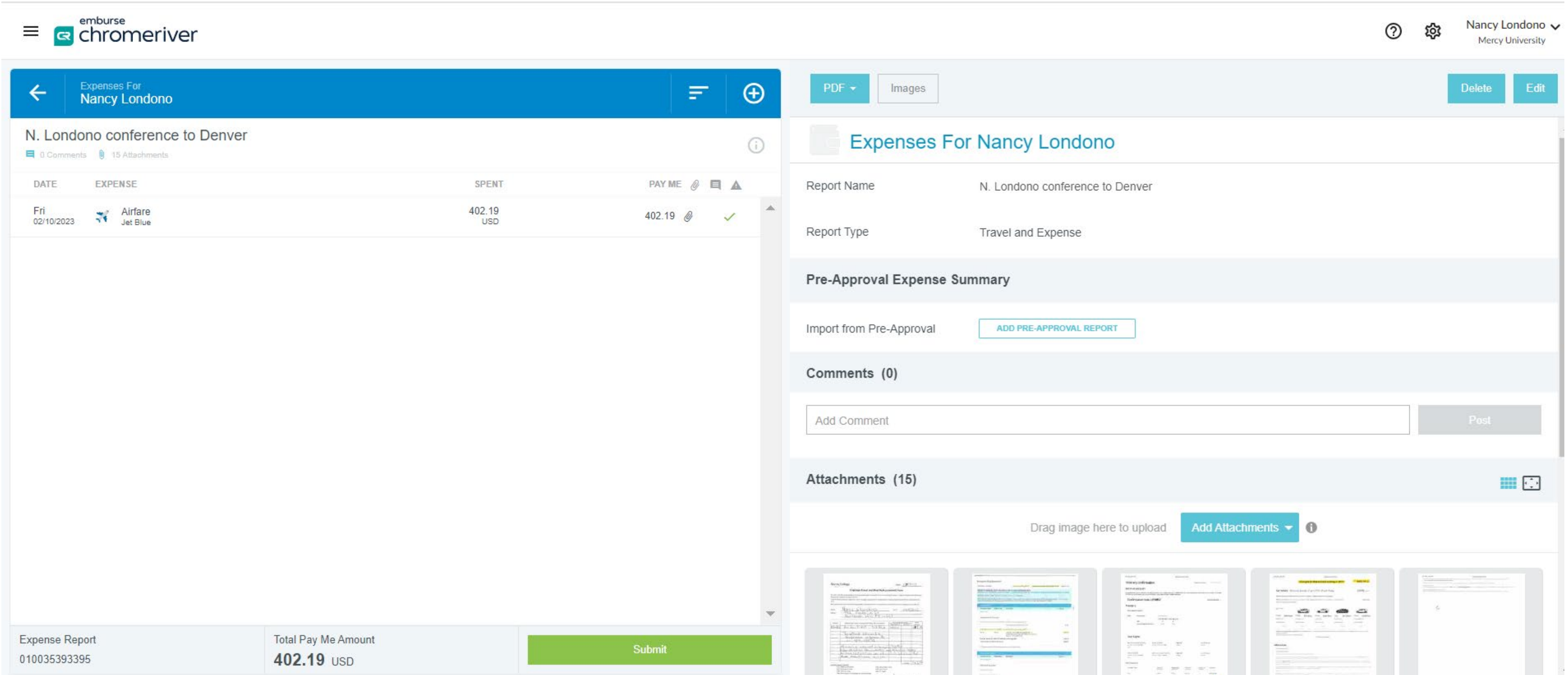
5. When adding expenses, you may encounter a warning message. The message will indicate information that is needed to complete that expense. A response is required in order to continue.



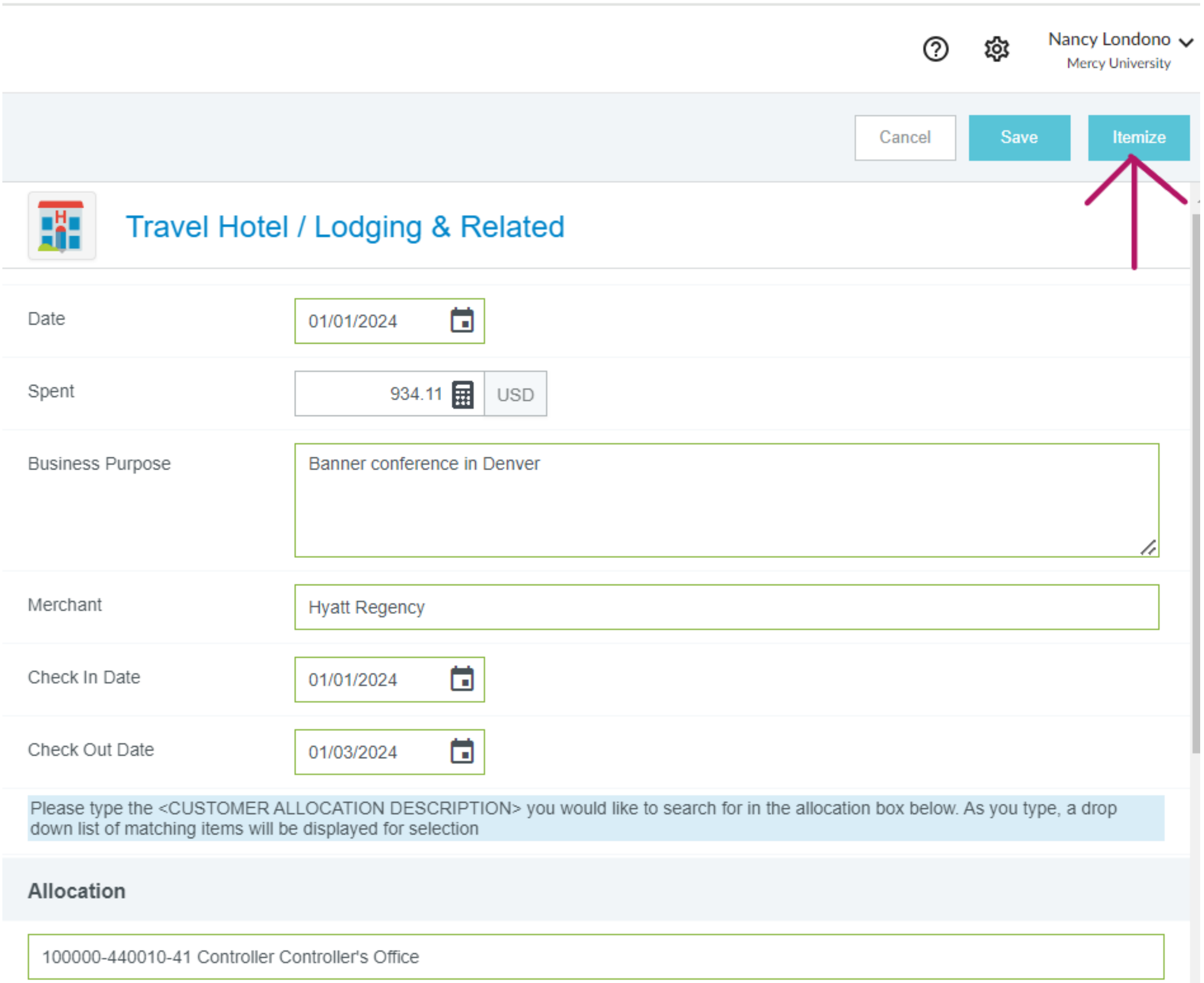
If the response is not entered, you will see the warning symbol on your expense report. The orange circle is an indication that a warning has not had a response. Until the response is saved on the expense, the Submit will remain grey and will not allow you to submit your expense report.



After posting the required information and attaching the receipts the expense report will be ready to be submitted.

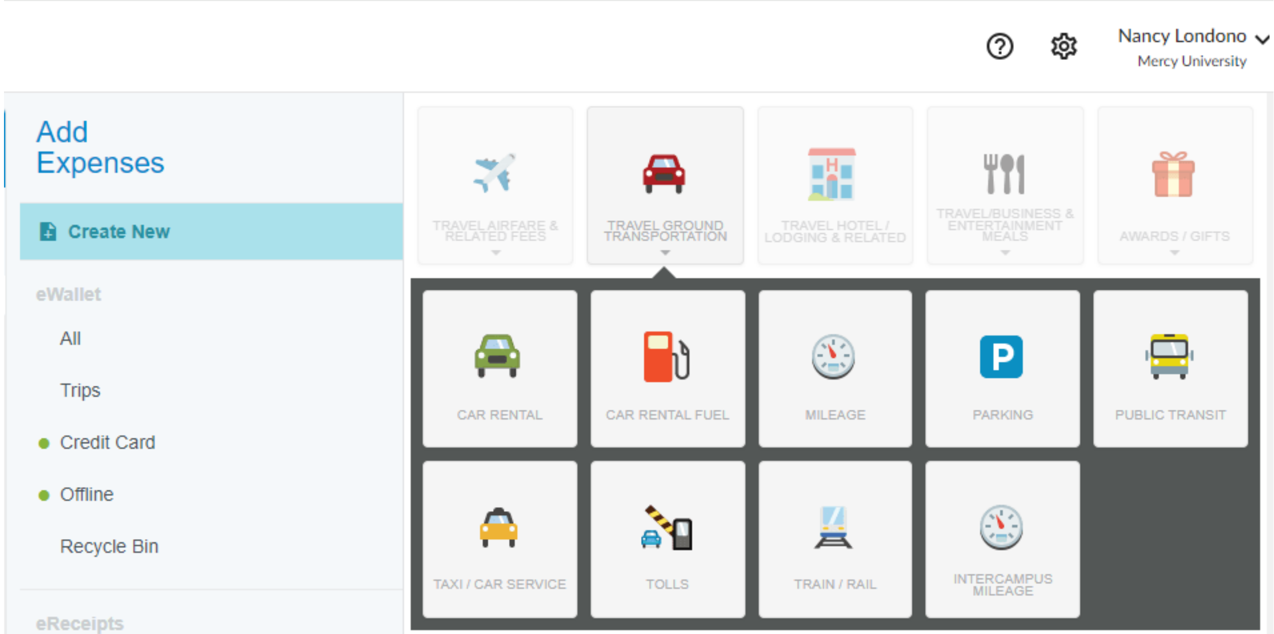


6. For the Hotel expense type, you will enter the expenses from the hotel folio that are reimbursable to you in the Spent section. Enter all the information on the form. After complete, select Itemize.

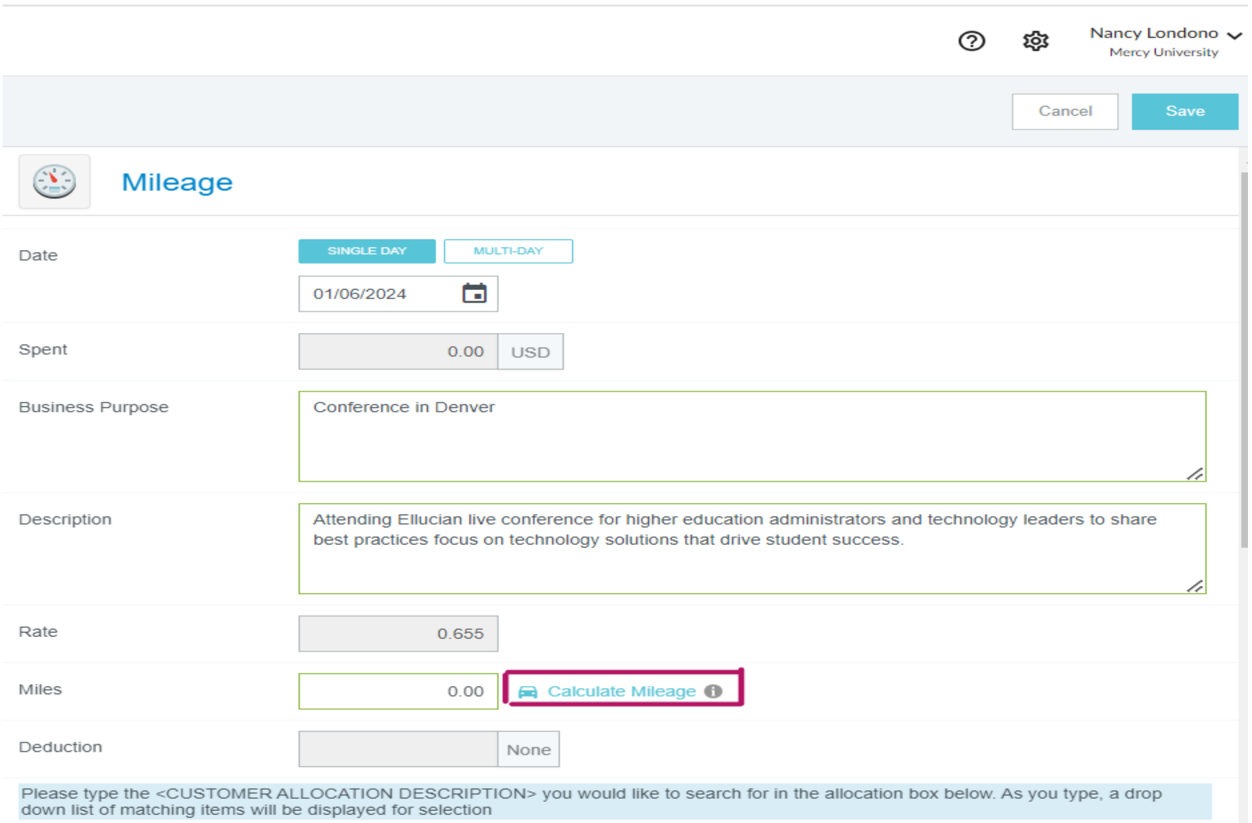


The Itemize section will allow you to select the expense type within your Hotel folio bill.

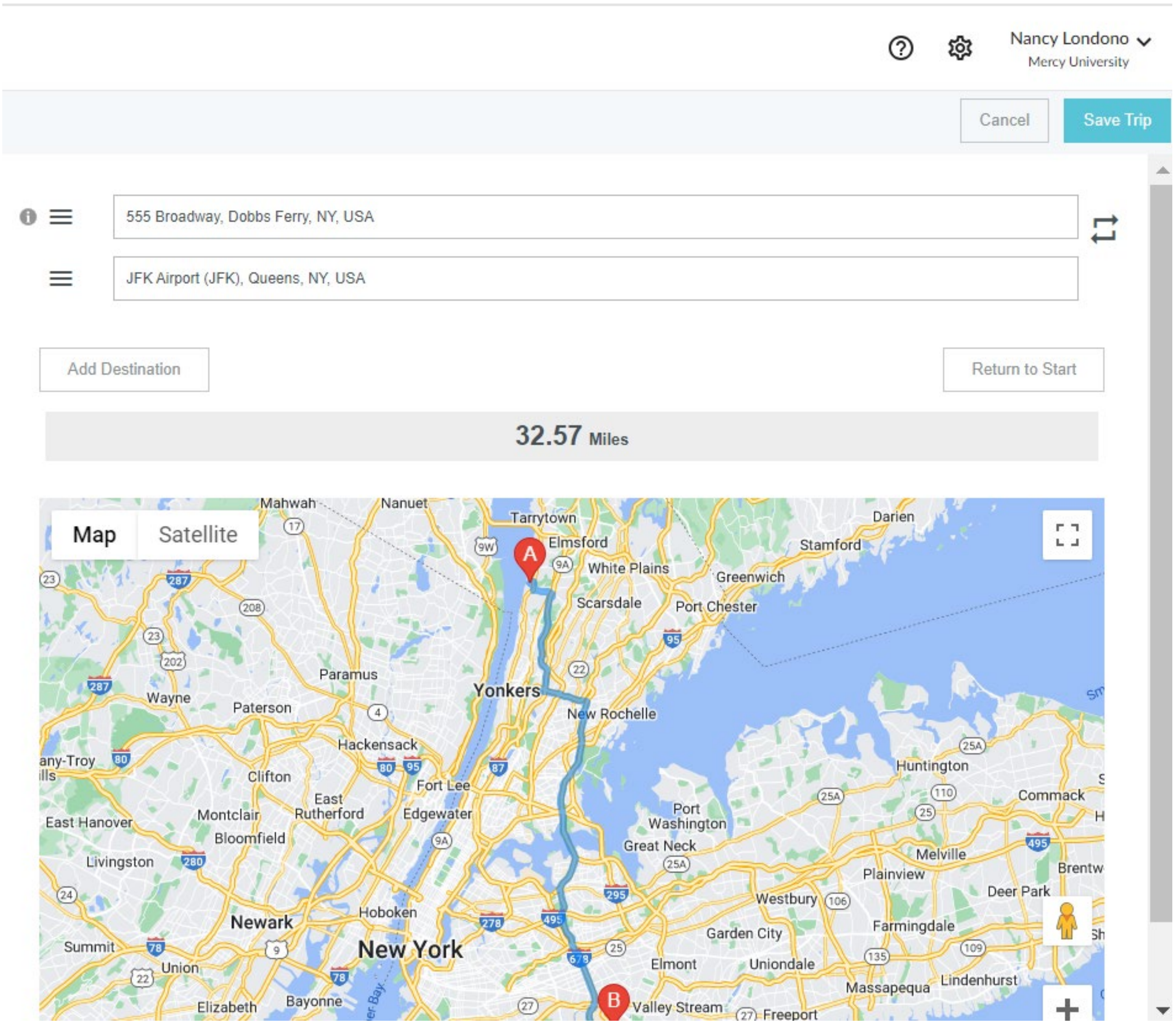
7. Travel Ground Transportation may have additional features or requirements.



a. Mileage: Calculate your mileage by using the Calculate Mileage link shown below.



Enter your beginning location and ending destination. Google maps will calculate the mileage for you. Make sure to enter all destinations for 1 full day. If there Once entered, click Save Trip.



The Mileage amount will be calculated based on your trip entry.

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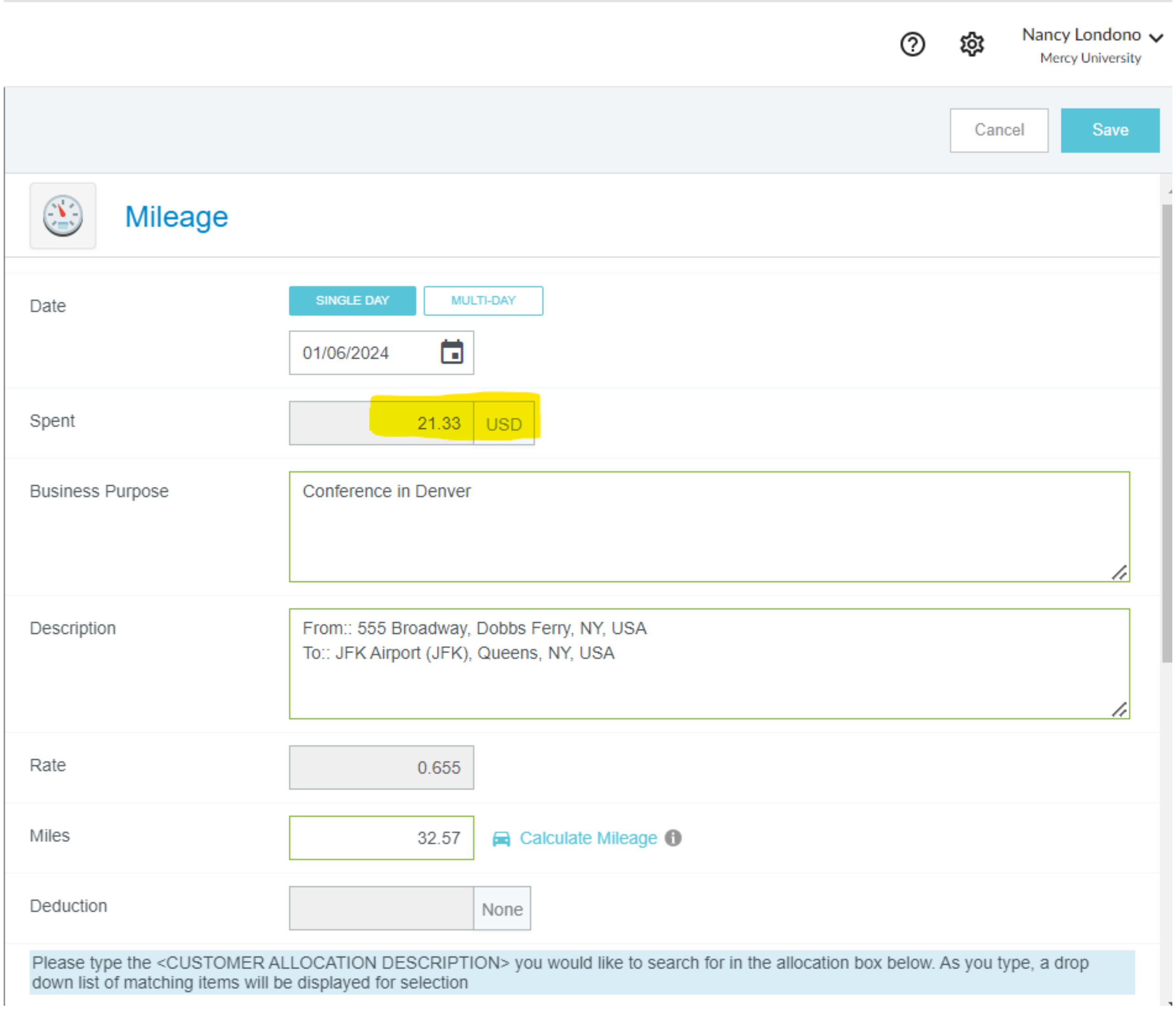

Nancy Londono
Mercy University

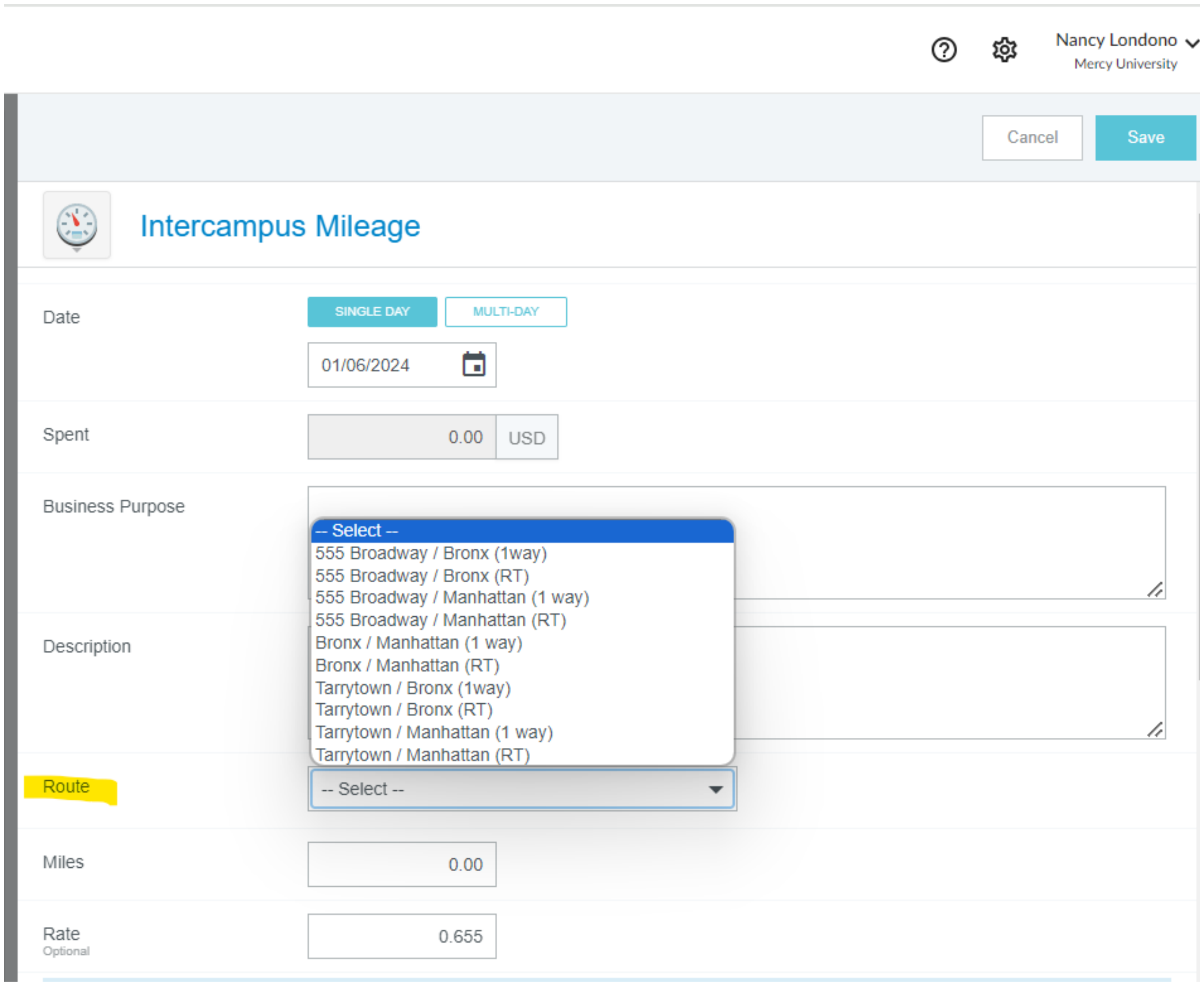
Cancel
Save

Mileage

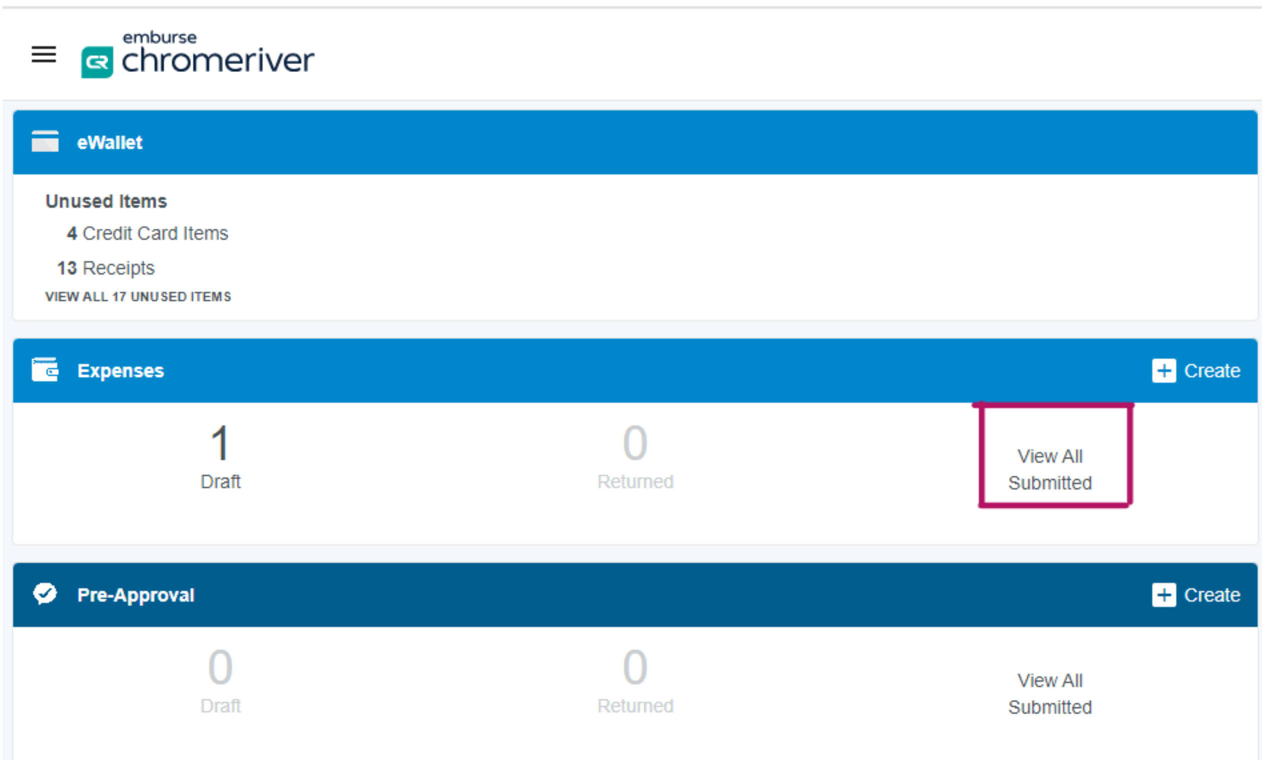
Date	SINGLE DAY / MULTI-DAY 01/06/2024
Spent	21.33 USD
Business Purpose	Conference in Denver
Description	From:: 555 Broadway, Dobbs Ferry, NY, USA To:: JFK Airport (JFK), Queens, NY, USA
Rate	0.655
Miles	32.57 Calculate Mileage
Deduction	None

Please type the <CUSTOMER ALLOCATION DESCRIPTION> 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

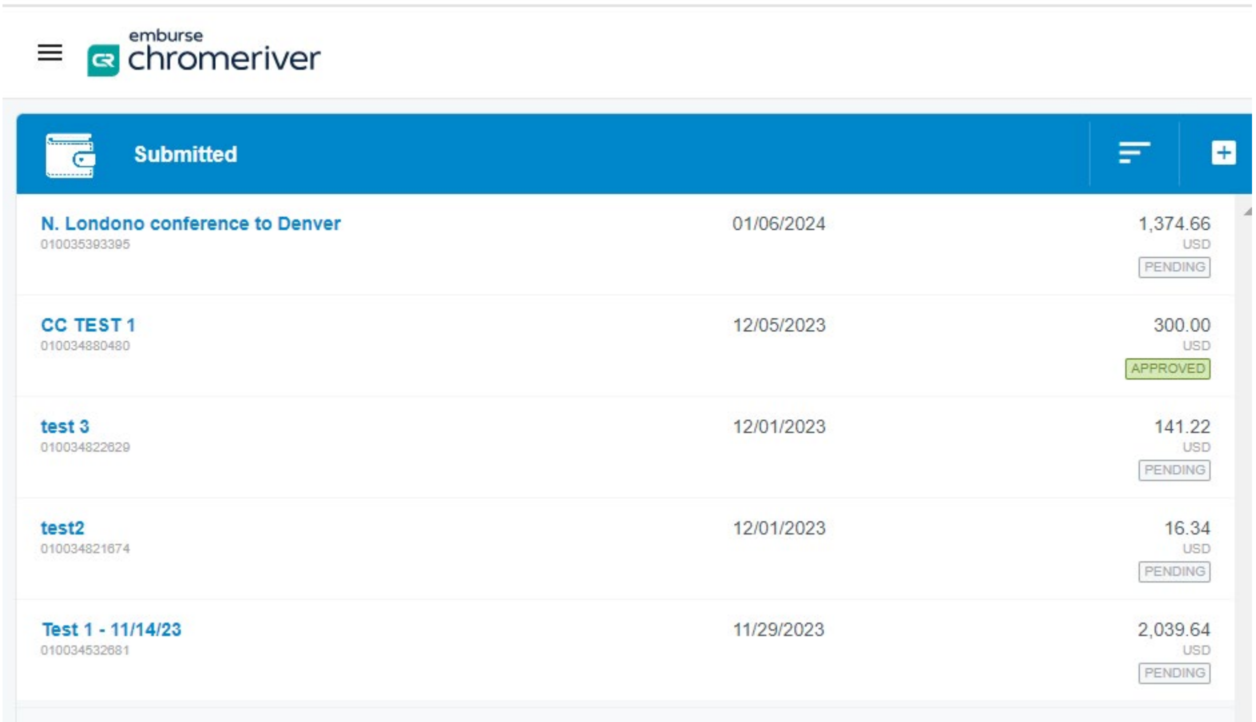
b. Intercampus Mileage: From the Route dropdown menu select the campuses you are visiting for the day (1way or RT – round trip) the mileage will be calculated automatically. No maps are required.



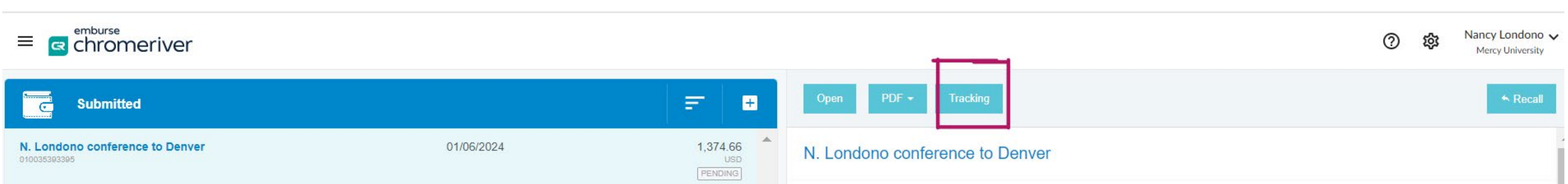
8. To view where your Expense Report is in the Approval process, first go to your Dashboard and select View All Submitted.



You can see all the reports that you have submitted within the last 90 days. From here you can select a report to view the tracking and you can recall if you need to make changes to your report. A PDF version is available if you choose to keep a hard copy on file.



To track where your expense report is in the approval process, select Tracking. The approvals are under Currently Assigned. If you select the button with the routing number, you will see who it is assigned to approve.

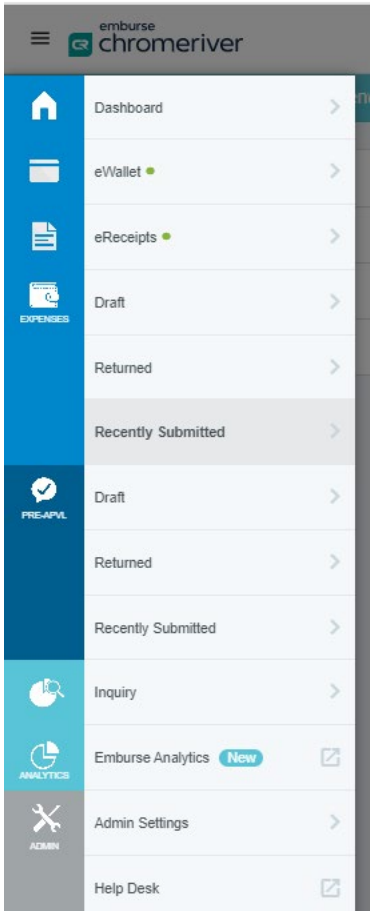


Tracking for N. Londono conference to Denver

EXPENSE TYPE	AMOUNT (USD)	STATUS	CURRENTLY ASSIGNED
Travel Hotel / Lodging & ...	934.11		
Mileage	21.33	Pending Approval	Brett Carroll
Intercampus Mileage	17.03	Pending Approval	Brett Carroll
Airfare	402.19	Pending Approval	Brett Carroll

***The report will go to your supervisor, if the trip is over $3,000 will get routed to the staff officer.*

9. You will be able to run reports for expense reports you submit for yourself, or for someone else as their delegate. The top left menu will have your reports under the Inquiry tab.



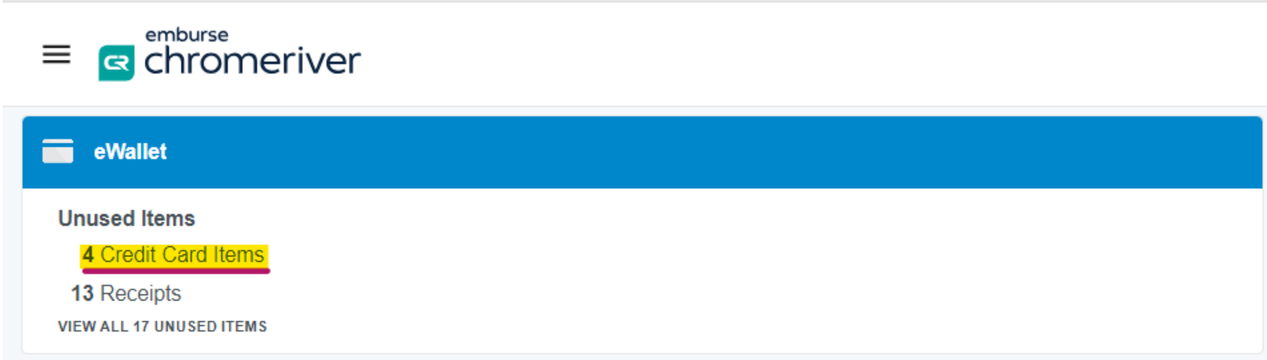
The list of Reports available to you are under Expenses. These reports are items that pertain to you as the expense owner. For your monthly credit card reconciliation, you can run the report My Firm Paid Items. This report will identify your credit card charges and allow you to see which transactions have been applied to a report.

You can add receipts through many methods. Please see Chrome River help page for guidance on all options.

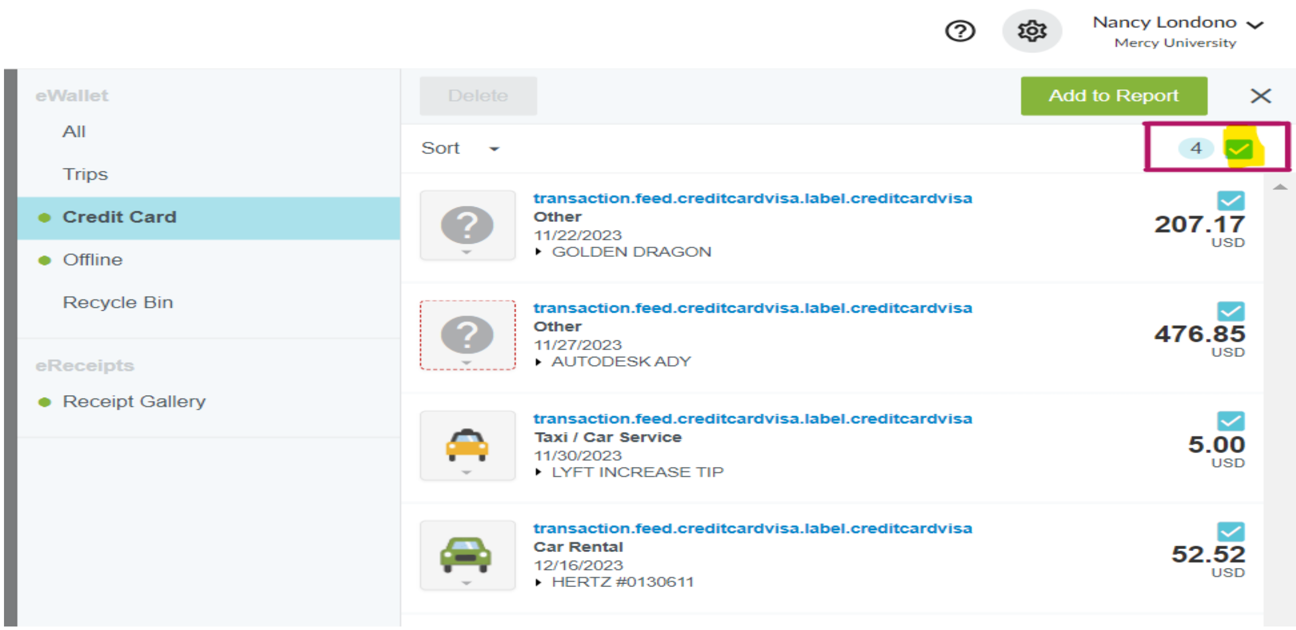
Creating a Credit Card Reconciliation Report

If you have credit card transactions to add to the report, you will find them under Credit Card in your eWallet.

1. In your eWallet open credit card charges.

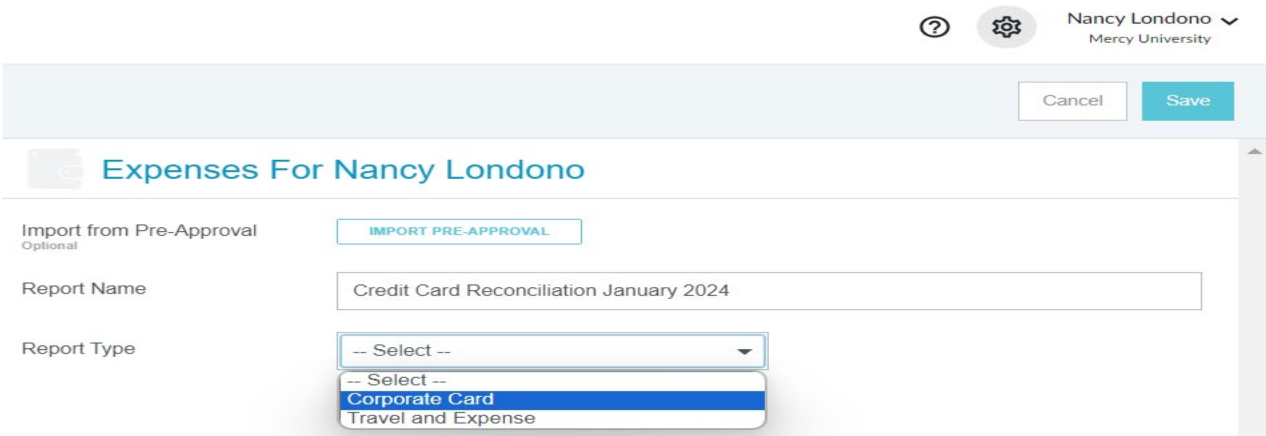


Check the CC expenses you need to reconcile, in this case I am selecting all (in the upper right-hand corner.) and click Add to Report:

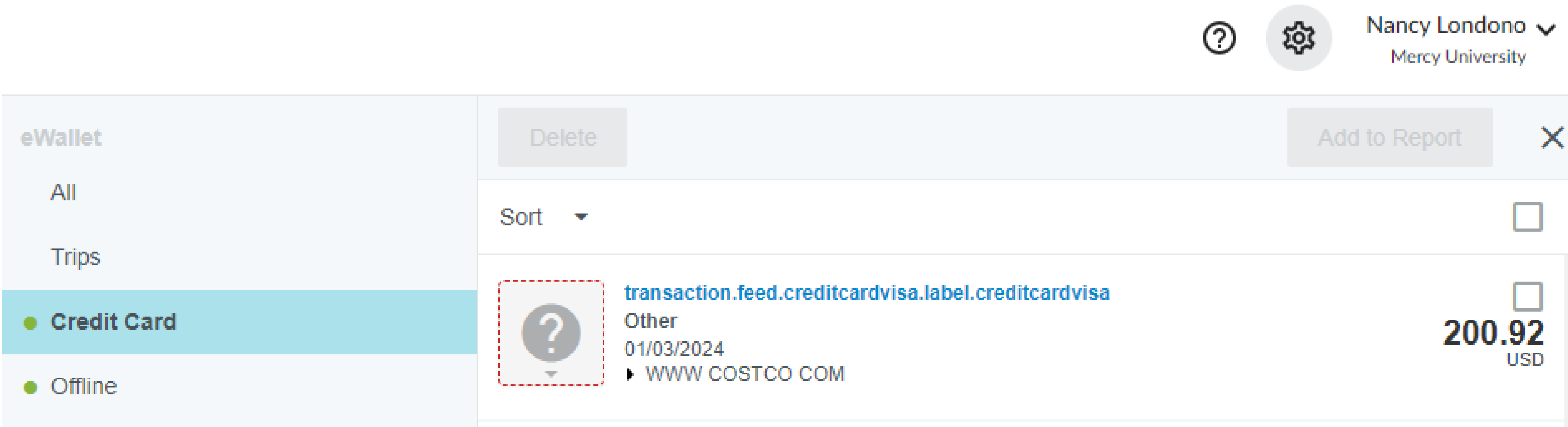


2. To reconcile your credit card transactions that are non-T&E related, Create a Credit Card Reconciliation Report Type. You have two options: One create a new Report or Add to an existing report.

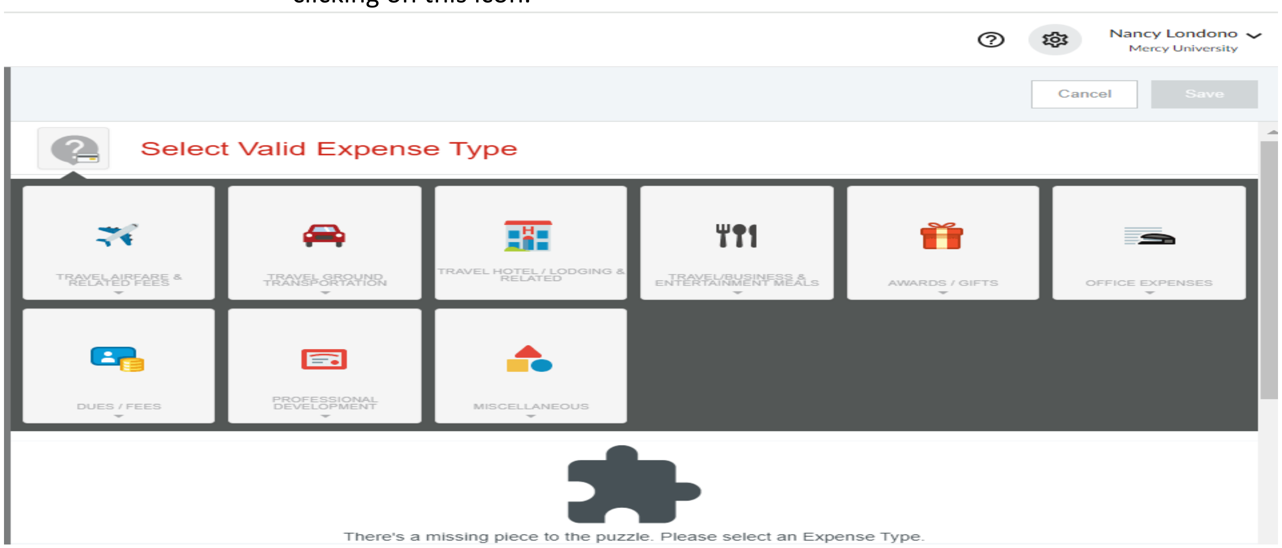
Fill in all the information for the credit card reconcliation and **click save**:



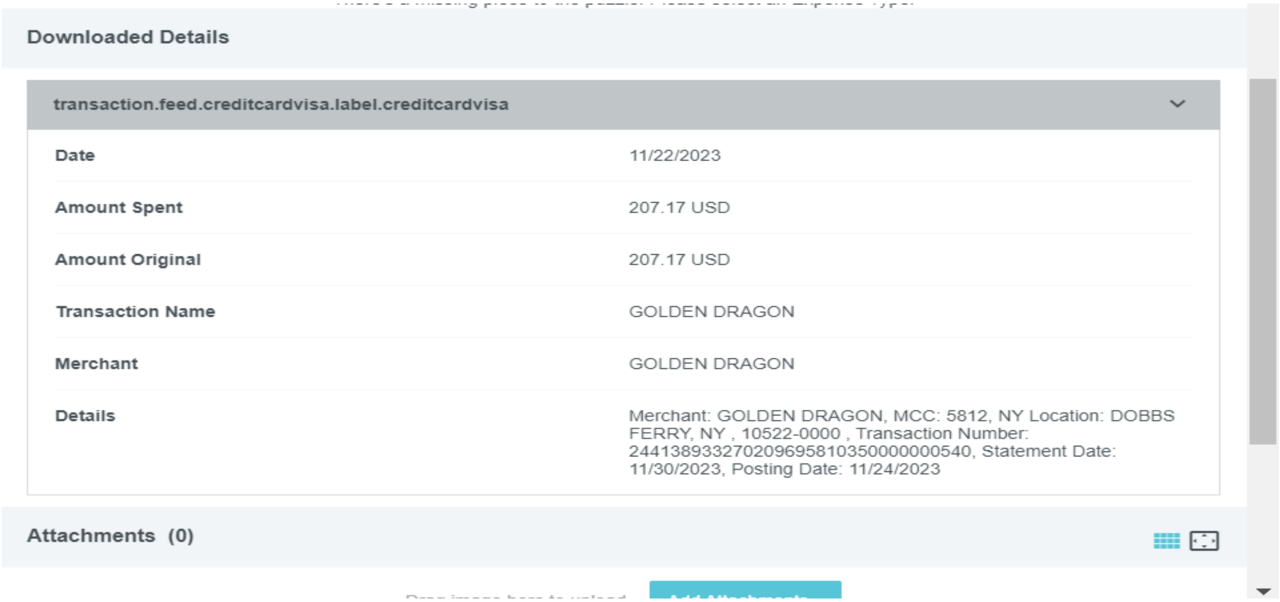
3. For each transaction, do the following:
   a. Select the appropriate Expense Type.
      i. If the icon next to the expense in your eWallet is a question mark, the system will automatically open the transaction and ask you to select the appropriate expense type. All credit card transactions require an attached receipt.



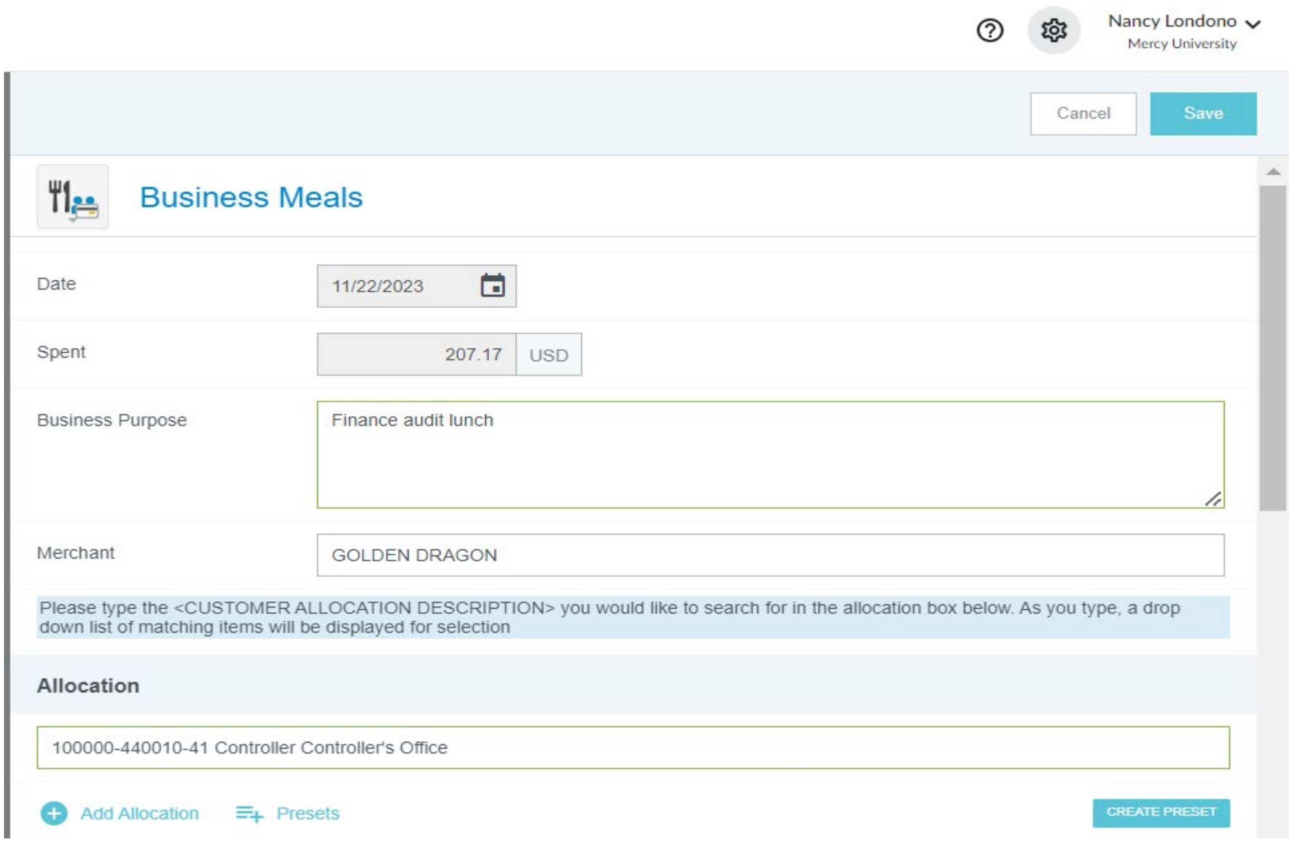
ii. If the icon is not a question mark, that means the system has guessed the Expense Type. If the expense type is incorrect, change the expense type by clicking the icon at the top of the form. You can change the expense type at any time by clicking on this icon.



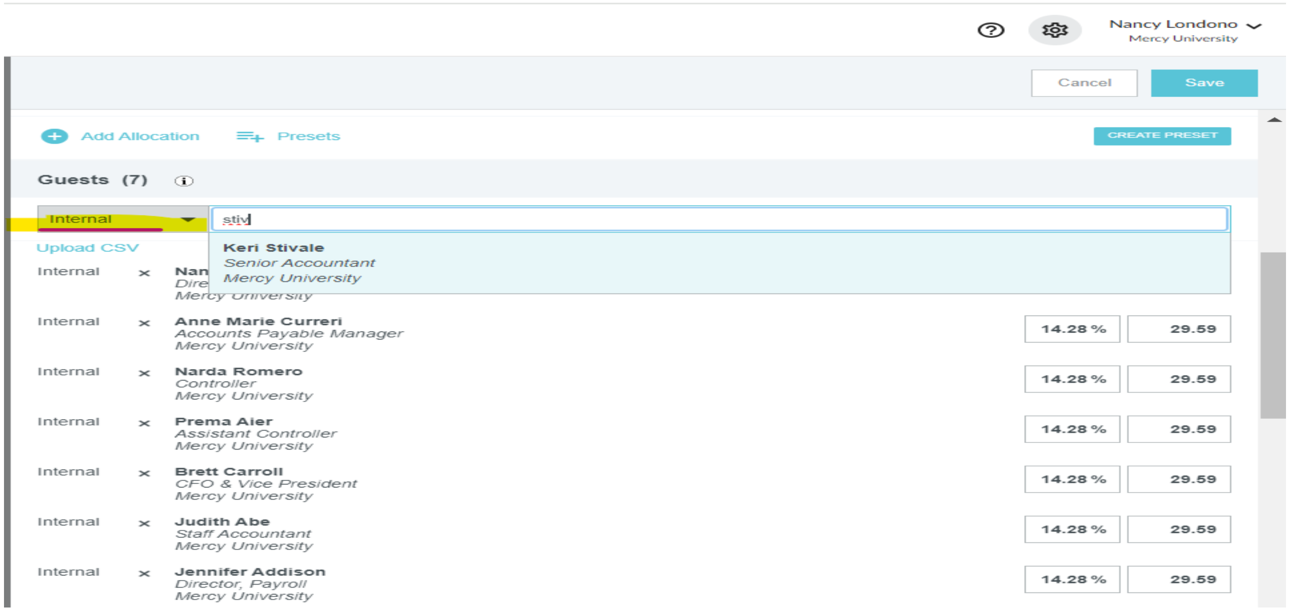
iii. To help select the right expense type, the system will display a copy of the attached receipt (if the receipt was pre-merged) on the left. You can also look at the Downloaded Details which will show you the information received from TD Bank.



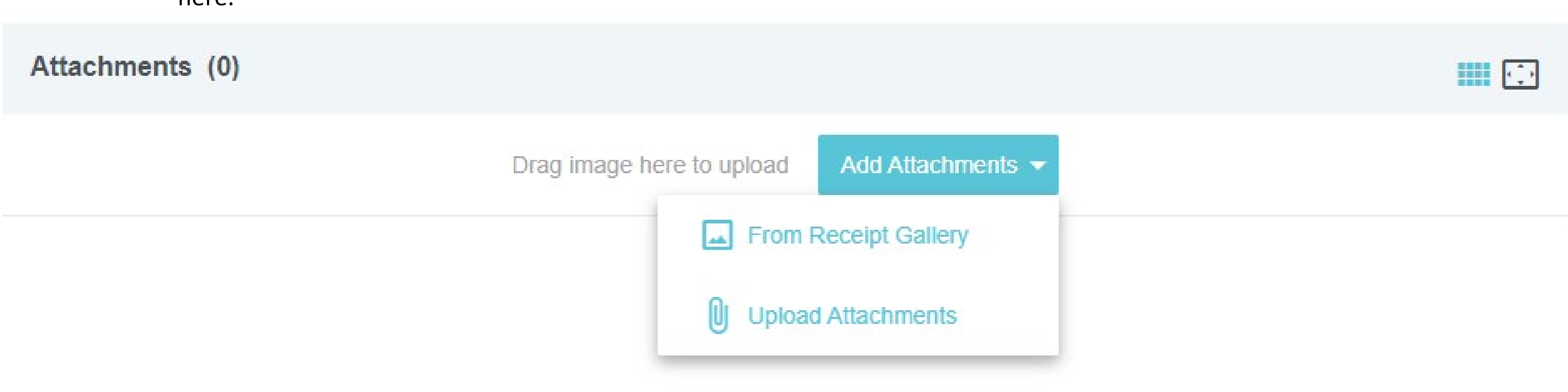
b. Enter a valid Business Purpose.



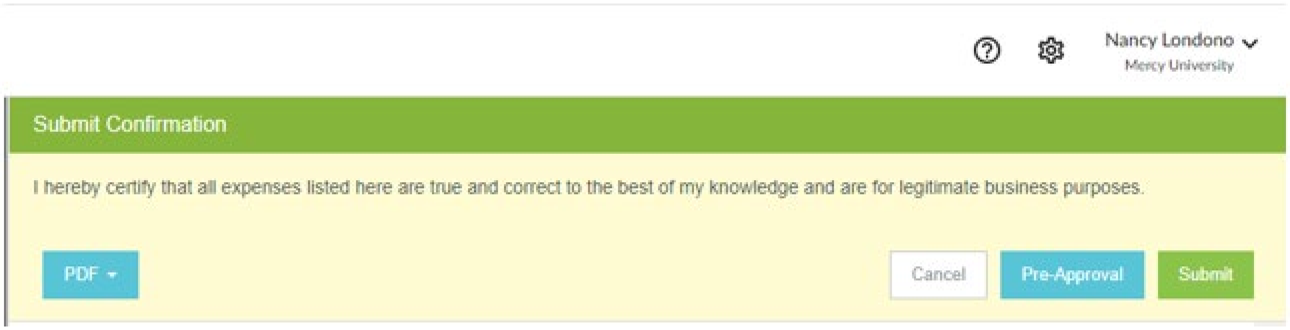
c. Use the Guest Selector to add required attendee details for this item:
   i. Add internal guests are people within your organization.
   ii. Add external guests are people outside your organization.



d. Upload the receipt. You can also add any additional Attachments. If you pre-uploaded your receipt, you will see the receipts here.



e. Once you have completed adding all expenses to your expense report, ensure that all transactions have a green check mark next to them and click the “Submit” button at the bottom.



Other Resources

On the Chromeriver log on page there are links for creating and submitting an expense report as well as approving expense reports.