Chrome River PCard User Guide for Cardholders

Chrome River Procurement Card Overview

Procurement Card (PCard) reconciliations will be electronically processed in Chrome River beginning with the January 4 – February 3, 2021 billing cycle. PCard transaction feeds are imported from Citibank into the Chrome River system and placed in the Cardholder's eWallet.

PCard Expense Reports will have a standard monthly reporting period from the 4th of the month through the 3rd of the following month. Expense Report submission will be required by the 15th of the month or next business day if the 15th falls on a weekend or TTU holiday. The deadlines will differ for fiscal year end reports. **NOTE**: Departments have the option of submitting Chrome River Expense Reports weekly or bimonthly in order to post expenses to the Banner FOP more frequently. This may be beneficial when it is important to allocate funds in the existing fiscal year or grant period.

Chrome River Login (eRaider authenticated):

https://app.ca1.chromeriver.com/login/sso/saml?CompanyID=ttu.edu This login may also be used from your **mobile device**. You may also access the link through Raiderlink under the A&F Work Tools Tab >> Procurement Services.

Delegates (formerly referred to as reconcilers) – A Chrome River User who can create Expense Reports for a Cardholder and access the Cardholder's Settings menu, Home screen, and Inquiry Reports. Delegates will receive copies of any email notifications regarding rejection or adjustment of Expense Reports created for the Expense Owner; however, the Delegate will not be able to approve Pcard Expenses routed to the Expense Owner. Expense Owners assign their own Delegates. Department Card Delegates will be assigned by the TTU PCard Office.

The right side of the Dashboard in Chrome River shows the Expense Owner's name. All TTU/TTUS employees have access to Chrome River. Users can click on their name for a drop down menu to access Settings.

- **Personal Settings** allows you to add additional email addresses the User may utilize for uploading Receipts. The User's ttu.edu email address is already populated as the primary email.
- **Delegate Settings** allows the User to add Delegates to have full access to your Dashboard, create Expense Reports on your behalf, and run Inquiry Reports.

  To **Add a Delegate**, click on Add New Delegates. Begin entering the user's name, R number, or email address. As you type the search results will narrow. Choose the appropriate Delegate.

  To **Remove a Delegate**, select the **X** next to the person's name.

Receipts

Chrome River SNAP App ("SNAP") – Mobile Device access:

SNAP enables Users to quickly and easily capture and upload Receipt images when the Expense occurs. The User can snap a photo of the Receipt using the SNAP app in the User's mobile device and it will upload directly to the Chrome River Receipt Gallery, and the Offline tab of the eWallet for reconciliation in Chrome River. SNAP may also be used to upload images taken with another app on the User's mobile device.

Download the free SNAP from the App Store (iOS) or Google Play Store (Android). Only JPG, PNG, and HEIC/HEIF files can be accepted via SNAP.

Emailing Receipts: Use the Snap and Send feature to quickly load Receipt images to the User's Chrome River eWallet. The User can take a photo of one or more Receipts and email them to receipt@ca1.chromeriver.com The Receipts will then be available within the User's Receipt Gallery. Use the ttu.edu email account that is registered with Chrome River or add additional email addresses via the Preferences menu.

Emailing Receipts to Another User's eWallet: enter the Cardholder's ttu.edu email address in the subject line of the email and mail to receipt@ca1.chromeriver.com. The sender must be a TTU/TTUS employee and have the email address they are sending from stored in Chrome River.

Emailing Receipts to a Department Card's eWallet: enter the Department Card's email address (assigned by the TTU PCard Office) in the subject line of the email and mail to receipt@ca1.chromeriver.com The sender must be a TTU/TTUS employee and use their ttu.edu email address.

A confirmation email is sent to the sender, confirming that the Receipt was received.

RECEIPT RECEIVED Chrome River

Your receipt has been received, processed and is ready to be expensed.

Expense Owner	TTU EHS2 0316 ehs0316@ttu.edu
Amount	84.20 USD
Date	11/30/2020
Expense Type	
Merchant	Market
Description	Kay Wall

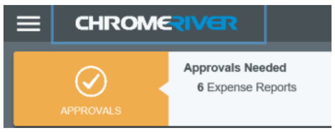
If a receipt image was attached, the data has also been extracted by Chrome River and will make it easier for you to quickly create an expense item. All data can be changed when the expense item is created within the app.

Attach Directly to Line Item: PDF Receipts may be dragged and dropped onto a line item Expense from the Receipt Gallery, Desktop, or uploaded with the Add Attachments option on the line item.

Additional Receipt information is available in Chrome River Help >> Expense >>Receipt Submission Use Cases.

Expense Report Approval in Chrome River System

Cardholders (Users) will be required to approve Expense Reports submitted on their behalf by a Delegate. If the User has pending approvals, they will see a yellow notification bar at the top of the Dashboard.



Click on the Expense Report requiring review. The User will see a preview of the Expense Report that contains FOP allocation and Receipts. The User may Open, download a PDF, view Tracking, Return (will return entire report), or Approve from the preview page.

For detailed information, click on **Open** to view expense line item detail. Click on the transaction to view the details. Opening an Expense report will allow the User to approve or return line items individually. Return or Submit actions for the entire Expense Report are at the bottom of the page showing the list of Expense detail. A return comment is required for returned Expense Reports.

Approvals by Email – must use your ttu.edu email account

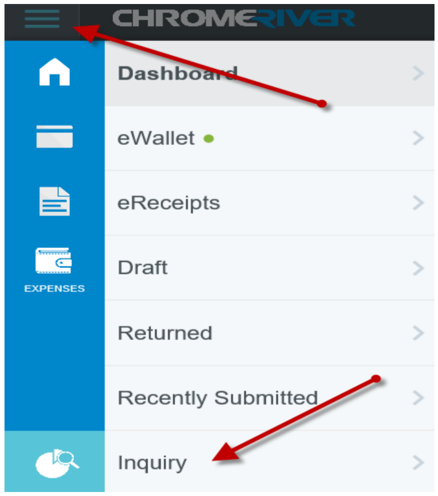
Chrome River will email Expenses that require approval. The subject line will contain the Expense Owner.

From the email, the Approver may approve all Expenses or return all Expenses to the Expense Owner by clicking on the **ACCEPT** or **RETURN** button. To approve or return specific line items, the Approver will need to log into Chrome River. The Approver may click on View Receipts at the bottom of the email. The email will provide the allocated FOP(s) used, total Expense, Expense line item category and amount, and compliance warning information (if applicable).

The Approver may add notes or comments to the Expense Report by entering them above the dotted line in the email that opens up after clicking on ACCEPT or RETURN.

Inquiry (Reports)

Inquiry allows the User and the User's Delegates to run reports on all Cardholder activity by category. To access Inquiry Reports, click the MENU button in the upper left corner of the Dashboard and click Inquiry.



- Click on the Expense link to open up the available reports.
- Action Date – enter date range
- Click on an Expense Report to access Download PDF to view Expense Reports and receipts.

Available Inquiry Reports for PCard

- **My Expense Approval Items** – Expense Reports that are pending the Expense Owner's approval.
- **My Expense Calendar** – List of Expenses shown in a calendar view.
- **My Expense Items** – List of each itemized Expense within a specified date range that shows status.
- **My Expense Reports** – List of Expense Reports within a specified date range that shows status.
- **My Items** – List of PCard transactions that have been applied to an Expense Report and pending transactions.
- **My Paid Expenses** – List of Expense Reports that have been approved with Banner Doc ID.