

MRU TRAVEL & EXPENSE - CHROME RIVER

*Create a
Pre-travel
Authorization*

Help is always available!



Susan Taylor – 8923 staylor@mtroyal.ca
Wanda Quon – 8935 wquon@mtroyal.ca
Debra Scott – 5674 dscott@mtroyal.ca
Payables and Expense Management

To sign in to Chrome River:

Chrome River – Single Sign On now available

Once you have signed on to your computer and opened your google mail:

Click on the Google Apps symbol (top right hand side of your screen)



Scroll down until you see the Chrome River icon:



**Click – and you're in
Chrome River!**

Chrome River screen layout – Welcome (or home) Page

Chrome River - Google Chrome

Chrome River Technologies, Inc. [US] | <https://app.chromeriver.com/index>

Apps ★ Bookmarks MyMRU LOTUS NOTES WEB Secure Remote Access Bookmarks

CHROMERIVER + New Debra Scott

APPROVALS

Approvals Needed
2 Expense Reports 0 Pre-Approvals

EXPENSES

24	2	17
Draft	Returned	Submitted Last 90 Days

PRE-APPROVAL

10	0	6
Draft	Returned	Submitted Last 90 days

CONTACT

For assistance with Expense reimbursement and Pre-Travel requests, please contact:

Accounts Payable Support accountspayable@mtroyal.ca
Credit Card Support Susan Taylor (8923) A-M; Wanda Quon (8935) N-Z
Accounts Payable Manager Debra Scott (5674)

NOTICES

REMINDER: Emailing Receipts to Your Account
You have an option to email any receipt to receipt@chromefile.com. Please make sure to send the email from the email account that is registered online so the system can recognize and store the receipt in your account. The receipt will then be available within your Receipt Gallery.

MRU Travel Policy Details

Please refer to MyMRU for a full list of policies, forms and additional travel and/or PCard details.

- [MRU Travel & Expense](#)
- [PCard Resource Centre](#)
- [Travel & Expense Policy 820-01](#)
- [Off Campus Safety Policy](#)
- [All Policies](#)

HELP

Full HELP is available throughout the application in the Chrome River Help Center.

- [CR Help Center](#)
- [Getting Started](#)
- [Quick Start Video](#)
- [Create an Expense Report](#)
- [Create Pre-Approval](#)

Chrome River_Qu...mp4 ^ Show all x



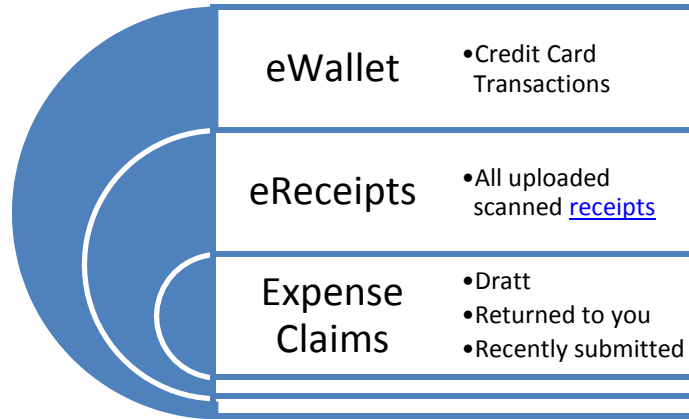
Click to bring up your system menu – allowing you to see approvals in your queue, your e-wallet, e-receipts & draft, returned or recently submitted PTA's or

Clicking on the Chrome River Icon will always bring you back to the Welcome page.

Clicking on NEW will give you the menu to choose to start a new PTA or expense claim.

Clicking on the user name will bring up the user menu, allowing you to change profile settings, access the help menu and log out button.

System Menu:



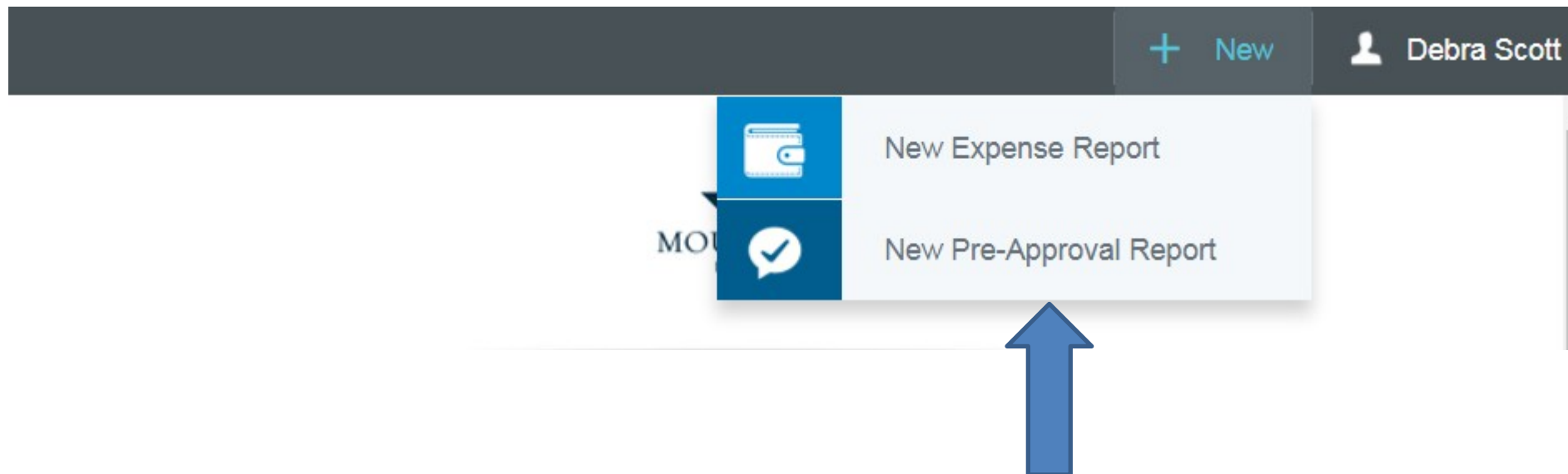
A screenshot of the CHROMERIVER system menu. The header is dark grey with the logo "CHROMERIVER" in white and blue. The menu items are listed on the right, each with an icon on the left and a right-pointing arrow. The items are:

- eWallet** (wallet icon) with a green dot
- eReceipts** (receipt icon) with a green dot
- EXPENSES** (expense icon) with a blue background: Draft, Returned, Recently Submitted
- PRE-APVL** (checkmark icon) with a dark blue background: Draft, Returned, Recently Submitted
- Inquiry** (magnifying glass icon) with a light blue background

Create Pre-travel Authorization

Pre-travel authorization is required for all MRU travel. Once your PTA is approved, the funds to be used for your travel will be encumbered (charged as an outstanding commitment) against the FOAP(s) you used to create your PTA. It is important to be as accurate as possible when you estimate your expected expenses.

From the Dashboard, tap the **+NEW** button in the upper right hand corner and select **NEW PRE-APPROVAL REPORT** from the drop down menu.



Cancel

Save

Complete the HEADER page:

Pre-Approvals For Debra Scott

Report Name

Conference name or city

Business Start Date

08/27/2017



Business End Date

08/27/2017



If your trip includes personal days, only enter the business dates here.

Number of Days

1

Greyed areas are non-

Pay Me In

CAD - Canada Dollars

Business Purpose

Enter the business purposed for the trip – why you are taking the trip.

Region

-- Select --

Select the Region and Country you will visit.

Country

-- Select --

City

Enter the City.

Itinerary are the legs of your trip and is used for risk assessment.

Itinerary

Calgary-Toronto-Calgary

Use the drop down boxes to select Risk Level and Travel Purpose.

Risk Level

-- Select --

Please update the highlighted items.

High & Medium Risk selection require Form One to to uploaded with the PTA prior to submission

Travel Purpose

-- Select --

Is travel related to Research Activity?

Click the box if the travel relates to a research activity.

Are funds managed by Research Services

Click the box if you are using a Research Services ORG

Please refer to the welcome page for links to related policies.

Reviewed Policies?

It is mandatory to be familiar with MRU travel policy.

Did you get your quote through Uniglobe for Air / Hotel / Car?

This is optional.

Enter contact information for someone who is not travelling with you.

Emergency Phone Number

Emergency Name

Depart MRU: MM/DD/YYYY

08/27/2017



Return MRU: MM/DD/YYYY

08/27/2017



Enter dates for the full time you expect to be away from Calgary – personal and business days inclusive.

FOAP

FOAP

| Search for Allocation

🕒 100001-2050 **Office of Research Services**
General Operating

All Fund/ORG combinations are in the system. You can enter the full number or any part of the number. You can type part of the name of the department to give you a reduced number of choices. Choose the correct FUND/ORG combination for the first box.

Once you have chosen the FUND/ORG two more boxes will appear. The second box is the ACCOUNT and the third box is the PROGRAM. All available choices are loaded in the system. Click into the box to choose or enter the ACCOUNT and PROGRAM.

FOAP

100001-3730 Supply Chain Services General Operating

-- Select --

-- Select --

Be patient with the search functionality!

FOAP

100001-3730 Supply Chain Services General Operating

78110-Conference - Attended

11001-Credit Instruction

If you are using multiple FOAP's for your trip – click

+ Add Allocation

FOAP

Each time you click +ADD ALLOCATION, a new set of three boxes will appear. You cannot change the percentages, but you can change the dollar amount per FOAP. It is best to adjust these once you have entered your estimated expenses.

Split Equally

Clear Splits

×

100001-3730 Supply Chain Services General Operating

50.00 %

0.00

◀

78110-Conference - Attended

11001-Credit Instruction

×

100001-2051 Institute for Community Prosperity General Operating

50.00 %

0.00

◀

78110-Conference - Attended

11001-Credit Instruction

100.00 %

0.00

Once you have completed the header, click **SAVE**



Cancel

Save

Depart MRU: MM/DD/YYYY

08/27/2017



Return MRU: MM/DD/YYYY

08/27/2017



FOAP

Split Equally

Clear Splits

×	100001-3730 Supply Chain Services General Operating	50.00 %	0.00	◀
	78110-Conference - Attended			
	11001-Credit Instruction			
×	100001-2051 Institute for Community Prosperity General Operating	50.00 %	0.00	◀
	78110-Conference - Attended			
	11001-Credit Instruction			
		100.00 %	0.00	

+ Add Allocation

Add estimated expenses

You can create one or multiple line items for the same expense type, such as two airfare line items or five taxi line items. Or you can combine your five taxi trips into one line item – just add some detail in the description line!

The + Button will take you back to the

ATED

AIRFARE	CAR RENTAL	MILEAGE	PARKING	TAXI	PUBLIC TRANSIT
BUS LINE / TRAIN	HOTEL - LODGING	PER DIEM	AGREED AMOUNT PERDIEM	REGISTRATION / TUITION	OTHER EXPENSES
PERSONAL / EXTERNAL FUNDED					

Tapping on an expense type tile takes to the Add Expense for that type. Enter the required information and tap SAVE.

Cancel

Save



Airfare

All estimates must be in Canadian dollars. Currency conversions must be done prior to entering estimates in the PTA.

Estimated Amount

0.00  CAD

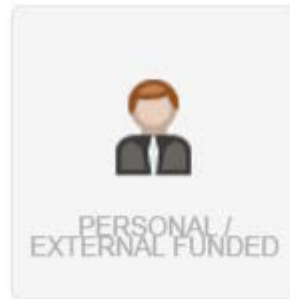
Description

This field can be used to explain multiple line items for one expense types such as two airfares. Or can be used to list additional legs of a trip.

Good to know...

Personally or Externally funded amounts:

- Can be entered using the tile:



Use this tile to enter amounts that will cover the cost of all or part of your expenses for the trip. These could be externally funded amounts or amounts that you are covering personally including MRFA PD amounts.



Personal / External Funded

Estimated Amount

-900.00  CAD

This is the only tile that **MUST** be entered as a negative.

Description

MRFA PD - 400.00

XYZ Assoc -500.00

Explain the funding.

Save and Submit

Once you have completed entry of all estimated expenses and saved, click the SUBMIT button on the lower left centre.

PA Report ID 010000292581	Total Estimated Amount 411.36 CAD	<input type="button" value="Submit"/>
------------------------------	--------------------------------------	---------------------------------------

Submit Preapproval

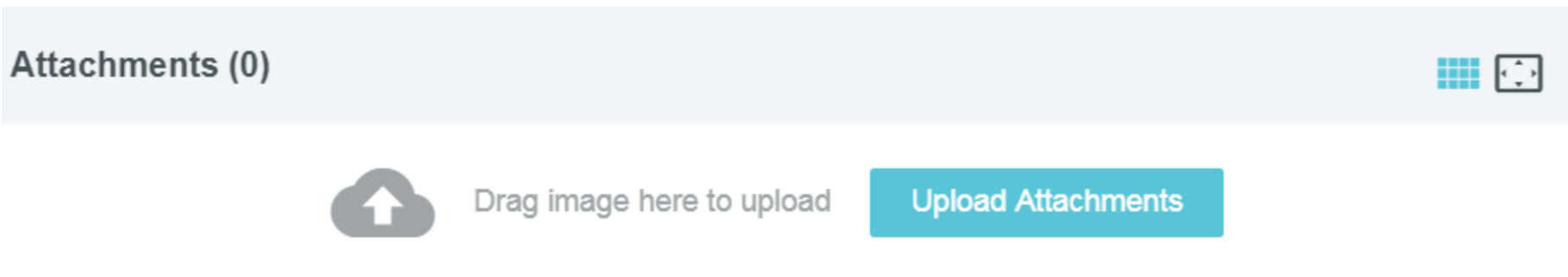
I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.

Read the disclaimer and click submit.

Attaching images

You can attach images to a PTA while you are creating it or while it is in draft stage after it has been created. Images may be uploaded directly through the app or accessed in the Receipt Gallery (See Training – Attaching Receipts).

To attach images to your PTA, tap anywhere in the header of the report to bring up the header preview. At the bottom of the header, you will see:



Clicking UPLOAD ATTACHMENTS will allow you to select a document or picture saved on your computer.

What is the status of my PTA?

You can see where your PTA is in the approval queue by:

1. Click on your “Recently Submitted” PTA’s from the system menu
2. Click on the PTA you wish to enquire about
3. The header of the PTA will come up with these selections across the top:

Open

PDF

Tracking

← Recall

Click "Tracking"

This will show you the status and who the PTA has been assigned to for the next level of approval.

Tracking for Ellucian Vancouver		✕
Status	Pending Approval	
Estimated Amount	411.36 CAD	
Routing Steps		
1		
Step Number	1	
Assigned To	Adele Smith	
Assigned To	Adele Smith	
Assigned Date	08/27/2017 02:58 PM	
Step Status	Assigned	

You can recall a PTA as long as it has not been approved.

An approver can return a PTA to you for changes or comments prior to approval.

Help is always available!



Susan Taylor – 8923 staylor@mtroyal.ca
Wanda Quon – 8935 wquon@mtroyal.ca
Debra Scott – 5674 dscott@mtroyal.ca
Payables and Expense Management