Chrome River Tips & Best Practice Guide

Accessing Chrome River	As of **November 21st**, all users with a Banner Finance profile will be able to access Chrome River via Humber College Single Sign-On (SSO). The URL for Chrome River is http://myexpenses.humber.ca. This link can be accessed using any device (PC/Mac and Mobile) with an internet connection.
Emailing Receipts to Chrome River	When emailing a receipt image to Chrome River, please send it to receipts@ca1.chromeriver.com. For ease of access, this address can be saved to your email contacts. To ensure Chrome River receives your emailed receipt image, use either your Humber email account or an alternate email address that you have added to your **Personal Settings** in Chrome River. You should receive an email notification from Chrome River indicating that your receipt was received. When emailing a receipt, for best results, select a medium receipt image size or a size that is approximately **500 KB**. **Note:** Some Android devices set the default image size within the settings option of the phone and you will not be prompted to select an image size when emailing. Please visit the Finance website (https://humber.ca/finance/resources) to access the Job Aids on adding an alternate email address and adding receipts to the receipt gallery in Chrome River.
Submitting Receipts to Chrome River • **on Behalf of the Expense Report Owner**	To submit paper receipts on behalf of your expense owner, please do the following: 1. Scan the receipt(s) and email it to yourself 2. Upload the scanned receipts through Chrome River's upload document functionality **Note:** Since the *sending* email must be part of the Chrome River user's profile, delegates are NOT able to email receipt images directly from their email account to another cardholder's receipt gallery. Please visit the Finance website (https://humber.ca/finance/resources) to access the Job Aid on adding receipts to the receipt gallery.
Retaining Receipts	Receipts must be electronically submitted to Chrome River (for each transaction), therefore, cardholders are NOT required to keep nor submit original paper receipts to Financial Services once the receipt has been submitted and verified in Chrome River.

	Once a receipt has been loaded and the quality of the image has been confirmed in Chrome River, the paper receipt can be disposed. You are NOT requirement to keep your original receipts. **IMPORTANT**: Before disposing of a receipt, ensure the image stored in Chrome River is in-focus, legible and contains all transactional information. For audit purposes, the image must be a true representation of the original receipt. Information related to vendor surveys, contests and/or promotions can be excluded from the receipt image.
Lost Receipts • **Affidavit**	The paper-based affidavit will NOT be used with Chrome River. Instead, users must electronically provide an explanation within Chrome River for lost and/or missing receipts.
Credit Card Statements	The paper-based monthly statement is being replaced by Chrome River's electronic expense report functionality. Please visit the Finance website (https://humber.ca/finance/resources) to access the Job Aid on how to submit P-card transactions.
Default FOAPs and Monthly Submissions	Default FOAPs will NOT be used with Chrome River. This means that transactions that have not been allocated to a FOAP will NOT be automatically fed to Banner Finance. Instead, the transactions will remain in Chrome River until they are added to an expense report, submitted and approved. **IMPORTANT:** Credit Card expenses will only be posted to Banner Finance after they are approved in Chrome River. This means unapproved Chrome River transactions will NOT be included in your School/Department budget reports, therefore, to ensure budget holders are provided with timely information, we recommend monthly expense report submissions and approvals.
Creating an Expense Report	Finance is recommending that you follow a month and year format when naming expense reports (i.e. December 2017 Expenses). When completing the transaction details, the **Location** field drives the tax rebates, therefore, it should be used as follows: • **Ontario, Canada** – used when your receipt contains an HST charge • **Other** – used when your receipt DOES NOT contain an HST charge When allocating a credit card expense, the cardholder DOES NOT need to know the account code. Simply select the appropriate expense category tile/image. Each tile/image is mapped to the appropriate expense account.

	Please visit the Finance website (https://humber.ca/finance/resources) to access the Job Aid on how to submit P-card transactions.
Using a Purchase Card for Personal Expenses • **Steps to Reimburse the College**	Personal expenses should NEVER be applied to Humber's purchase card. Nonetheless, mistakes can happen. Cardholders are responsible for reimbursing the college for all personal expenses applied against their corporate purchase card. The steps for reimbursing the college are as follows: 1. Complete the **Miscellaneous Cash Receipt** form (https://www.humber.ca/finance/forms-procedures). • Use the following FOAP for all personal expenses: o **Fund = 1000** o Organization = leave blank o **Account = 1223** o Program = leave blank 2. Take the completed **Miscellaneous Cash Receipt** form to the **Registrar's Office** for payment. Note: The Registrar's Office still accepts in-person College reimbursement transactions. 3. Provide the cashier with your payment. Only Visa, MasterCard and Debit are accepted. 4. Login to Chrome River and perform the following: • Select the associated P-card transaction and complete the required fields. Please remember to: o check the **Personal Charge** checkbox o select the **PERSONAL MATTER** allocation/FOAP o attach proof of payment
Accessing your Purchase Card Information • **Available Balance and Credit Limit**	Chrome River does NOT contain available balance nor credit limit information. To access your purchase card information, please contact BMO Customer Service directly. • Customer Service - 1.800.263.2263 For purchase card emergency services, please contact BMO directly. • Emergency Services (within Canada & U.S.A.) - 1.800.361.3361 • Emergency Services (International) - 514.877.0330
User Profiles in Chrome River • **Security**	Chrome River leverages Banner Finance Security. In other words, all Chrome River users must have a Banner Finance security profile with specific FUND and ORG access.

	Additions and/or changes to Chrome River user access MUST be submitted via the existing Banner Finance eForm process. 1. Go to https://its.humber.ca 2. Under Support Centre select **Submit an eForm!** 3. Complete and submit the **Provision Finance Security** form **Note:** For users with Banner Finance access, the existing FUND(s) and ORG(s) provisioned in Banner also apply to Chrome River. Users who DO NOT have Banner Finance access can be set-up in Chrome River without being provisioned with Banner Finance roles. For these users, having access to Chrome River does NOT equate access to Banner budget information.
User Profiles in Chrome River • **Approvals**	Chrome River leverages Banner Finance Approvals. In other words, users currently set-up as Banner requisition approvers will also have approval access in Chrome River to the designated FUND(s) and ORG(s).
Delegates in Chrome River • **Submitter Delegates** • **Approval Delegates**	There are two types of delegate roles in Chrome River: (1) **Submitter Delegate**: Someone you delegate to prepare your expense report on your behalf. Submitter Delegates take on the persona of the original expense owner, including their FUND and ORG access. **Note:** This still requires your approval before submitting your report for approval. Individuals assigned as a Submitter Delegate will NOT receive an email notification of such assignment. Instead they will see the delegators name underneath theirs when they click on their user name. (2) **Approval Delegate**: Someone you delegate to approve expense reports on your behalf for a specified period of time. For example, during vacation or extended absenteeism. The approval delegate should be someone who is along your reporting lines and is authorized to approve budget transactions for your school/department. Individuals assigned an Approval Delegate role will receive an email notification indicating that they have been granted access to approve expense reports on a delegator's behalf for a specified period of time.
Historical BMO Details Online (DOL) Information	As of November 21, 2017, cardholders do NOT have access to BMO Details Online, therefore, requests for historical DOL credit card reports/information must be submitted to mastercard@humber.ca.