

PROJECT RECHARGE



Three systems, recharged

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WHAT IS PROJECT RECHARGE?

Update, replace, & consolidate

Kuali Financial System

- Updated to the latest version

Travel and Expense System

- Replacing TEM with a new system based on Chrome River

Procure to Pay (P2P) System

- Consolidating various purchasing functions into a single marketplace Procure to Pay (P2P) system



CHROME RIVER NEWS

P-Card impact – Separation of duties

- ✓ New policy
- ✓ Policy Compliance Review Changes
- ✓ Receipts Required for All P-Card Transactions
- ✓ Streamlined Object Codes
- ✓ Separation of Duties



CHROME RIVER NEWS

- Meeting card
 - ✓ Will follow P-card policy



CHROME RIVER NEWS

- No TA therefore no encumbrances
 - ✓ Only the Expense Reimbursement (formerly the TR)
 - ✓ Important to set up the trip in advance of departure in order for the receipts to flow directly to your trip and start your expense report.



CHROME RIVER NEWS

➤ Setting up Trip in Advance

- ✓ Snap and Send
- ✓ Forward and Forget



CHROME RIVER NEWS

- CR will not follow KFS routing
 - ✓ Delegation will be different.

Chrome River	TEM
Delegate	Profile Arranger
Super Delegate	Org Arranger
Approval Delegate	Account Delegate



P-CARDS IN CHROME RIVER

New P-Card Policy

- Who can have a card
- Cardholder responsibilities
- Allowable use
- Sanctions for misuse



P-CARDS IN CHROME RIVER

Policy Compliance Review Changes

- AP will no longer conduct a monthly, statement policy audit review.
- Audits will be strategic.
- Fiscal staff will audit expense reports to confirm policy compliance and to resolve non-compliant transactions.
- P-Card staff is available to help.



P-CARDS IN CHROME RIVER

Receipts Required for All P-Card Transactions

- ALL P-Card transactions require an itemized receipt regardless of total
- Receipts > \$75 rule applies ONLY to Travel expenses



P-CARDS IN CHROME RIVER

Streamlined Object Codes

- Improve coding accuracy and efficiency
- We're trying to smooth out the selections
- Status updates will follow



P-CARDS IN CHROME RIVER

Separation of Duties

- Departments will share Chrome River Expense Report tasks to reduce fraud and error
- As a best practice, the initiator, reconciler and approver will be three, different university employees
- Fiscal Officer must not approve transactions she/he has initiated or reconciled

CHROME RIVER SNEAK PEEK

The screenshot displays the Chrome River mobile application interface for Indiana University. The top navigation bar includes the Chrome River logo, a menu icon, and user information: '+ New' and 'Indiana University'. The main content area is titled 'Expenses For Indiana University' and shows a specific expense entry for 'Trip to Conference'. Below the title, there are options for '0 Comments' and '0 Attachments'. A table with columns 'DATE', 'EXPE...', 'SPENT', and 'PAY ME' is visible, with a message 'Click "+" to add your first item.' Below the table, there are buttons for 'Expense Report' (with ID 010019792698), 'Total Pay Me Amount' (0.00 USD), and a green 'Submit' button. On the right side, there is a sidebar menu with options: 'Add Expenses', 'Create New', 'E-Wallet' (with sub-options: All, Offline, Recycle Bin), 'E-Receipts', and 'Receipt Gallery'. The main area on the right features a grid of expense category icons: AIR TRAVEL, GROUND TRANSPORTATION, HOTEL, AIRFARE, BAGGAGE FEE, UPGRADE/CHANGE FEE, AGENT FEE, MEALS, and TRAVEL OTHER.

CHROME RIVER + New Indiana University

Expenses For Indiana University

Trip to Conference

0 Comments 0 Attachments

DATE	EXPE...	SPENT	PAY ME
Click "+" to add your first item.			

Expense Report 010019792698 Total Pay Me Amount 0.00 USD **Submit**

Add Expenses

Create New

E-Wallet

- All
- Offline
- Recycle Bin

E-Receipts

Receipt Gallery

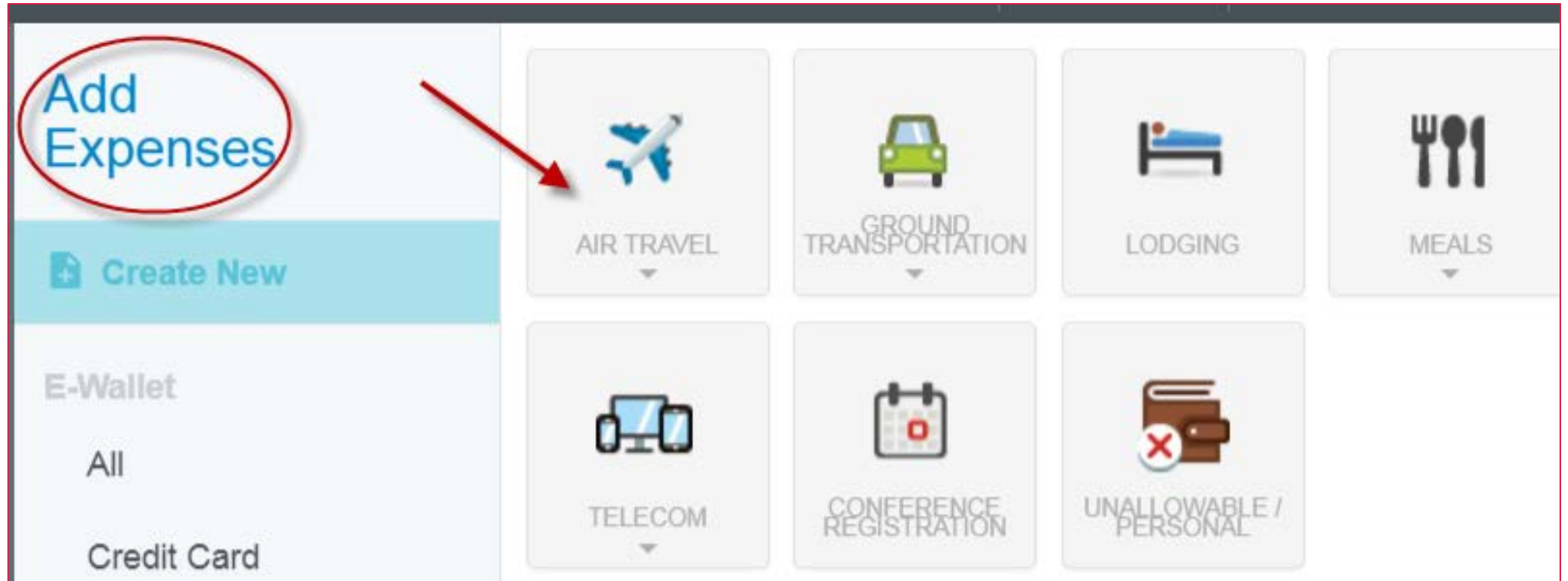
AIR TRAVEL GROUND TRANSPORTATION HOTEL

AIRFARE BAGGAGE FEE UPGRADE/CHANGE FEE

AGENT FEE

MEALS TRAVEL OTHER

ADD EXPENSES (TILES)



The screenshot displays a user interface for adding expenses. On the left, a vertical sidebar contains the text 'Add Expenses' (circled in red), 'Create New', and 'E-Wallet' with sub-options 'All' and 'Credit Card'. A red arrow points from the 'Add Expenses' text to the 'AIR TRAVEL' tile. The main area features seven tiles: 'AIR TRAVEL' (airplane icon), 'GROUND TRANSPORTATION' (car icon), 'LODGING' (bed icon), 'MEALS' (utensils icon), 'TELECOM' (laptop and phone icon), 'CONFERENCE REGISTRATION' (calendar icon), and 'UNALLOWABLE / PERSONAL' (wallet with red X icon).

Add Expenses

Create New

E-Wallet

All

Credit Card

AIR TRAVEL

GROUND TRANSPORTATION

LODGING

MEALS

TELECOM

CONFERENCE REGISTRATION

UNALLOWABLE / PERSONAL

ADD EXPENSES (DRAWERS)





ADD EXPENSES DETAIL (FORM)

Airfare	
Date	10/25/2017
Spent	0.00 USD
Depart Date	
Return Date	
Airline	-- Select --
Class of Fare	-- Select --
Agency	-- Select --
Departure Airport	-- Select --
Airfare Amount	0



SNAP AND SEND

ARCO #6209
950 NORTH 85TH ST
SEATTLE, WA 98103

Invoice # 902745
Date 06/12/09
Time 01:03PM
Auth # 261588
Sequence# 291

DEBIT Acct #
XXXXXXXXXXXX1100

PIC # 04

Pump	Gallons	Price
07	20.290	\$2.659

Product	Amount
Unlead 87	\$53.95

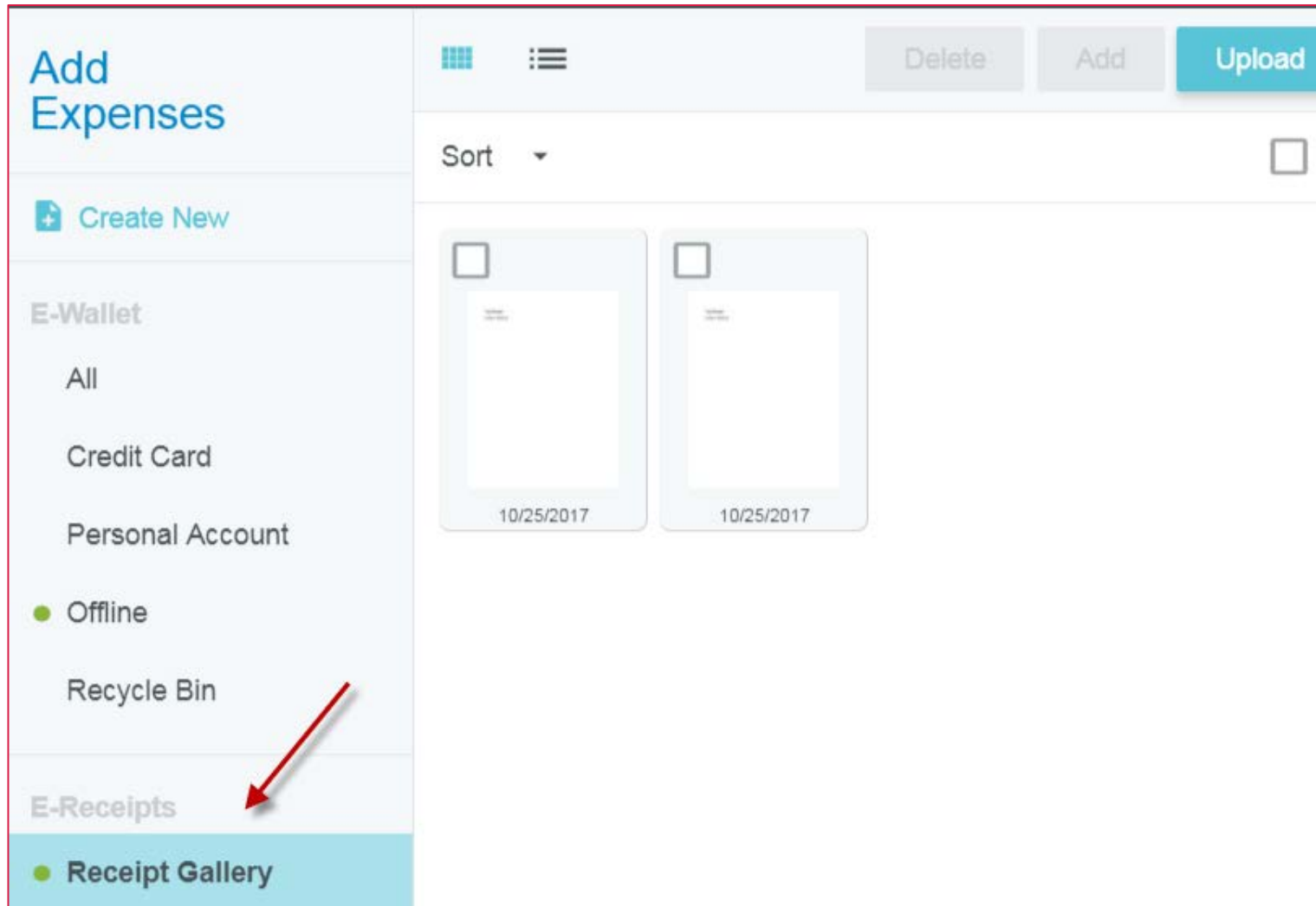
Trans Fee	\$0.45
Total Sale	\$54.40

PAYMENT FROM PRIMARY
ACCOUNT

Thank you for
Using ARCO
Please Come Back
Again!!
FUEL SALE




RECEIPT GALLERY



The screenshot displays a mobile application interface for managing expenses. On the left, a sidebar menu is visible with the following items: "Add Expenses", "Create New", "E-Wallet" (with sub-items "All", "Credit Card", "Personal Account", "Offline", and "Recycle Bin"), "E-Receipts", and "Receipt Gallery" (which is highlighted in blue and has a red arrow pointing to it). The main content area at the top right features a header with a grid icon, a list icon, and buttons for "Delete", "Add", and "Upload". Below the header, there is a "Sort" dropdown menu and a checkbox. The main area displays two receipt cards, each with a date of "10/25/2017".

CURRENCY CONVERTER



Car Rental

Date

Spent

FX

Pic






Re

Ag

RUB - Russia Rubles

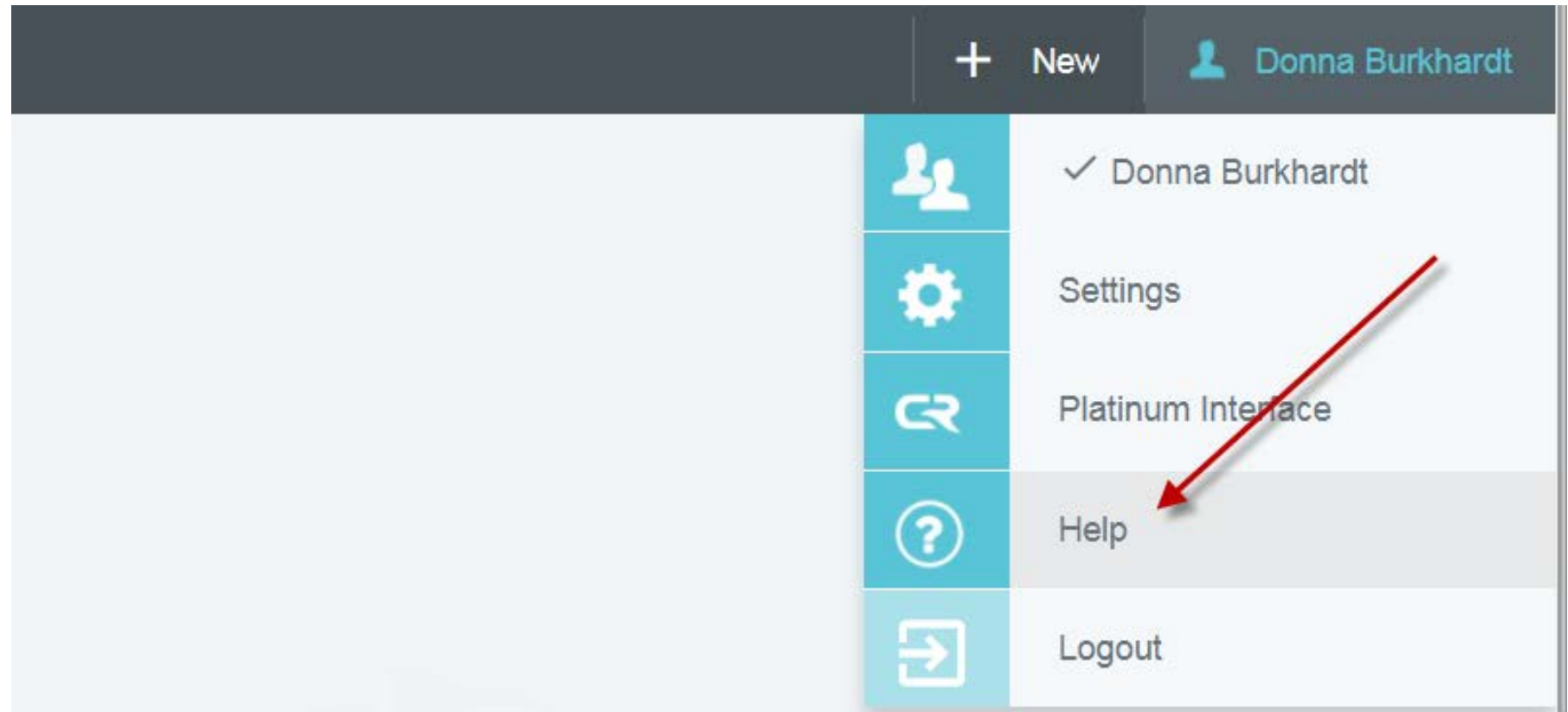
PAB - Panama Balboas	
PEN - Peru Nuevos Soles	
PGK - Papua New Guinea Kina	
PHP - Philippines Pesos	
PKR - Pakistan Rupees	
PLN - Poland Zloty	
PYG - Paraguay Guarani	
QAR - Qatar Riyals	
RMB - China (old)	
RON - Romania New Leu	
RSD - Serbia Dinars	
RUB - Russia Rubles	
RWF - Rwanda Francs	

CURRENCY CONVERTER

	Car Rental
Date	<input type="text" value="10/25/2017"/> 
Spent	<input type="text" value="2,123.00"/>  <input type="text" value="RUB"/>
FX Rate	<input type="text" value="0.0173497233"/> <input type="text" value="36.83"/> USD
Pickup Date	<input type="text"/> 
Return Date	<input type="text"/> 



TRAINING RESOURCES IN CHROME RIVER



The image shows a screenshot of the Chrome River user interface. At the top right, there is a dark grey header bar containing a plus sign icon, the text "New", and a user profile icon with the name "Donna Burkhardt". Below this header, a vertical menu is displayed on the right side of the screen. The menu items are: "Donna Burkhardt" (with a checkmark and a person icon), "Settings" (with a gear icon), "Platinum Interface" (with a circular arrow icon), "Help" (with a question mark icon), and "Logout" (with a square arrow icon). A red arrow points from the top right towards the "Help" menu item, which is highlighted with a grey background.

Icon	Text
✓ Person	Donna Burkhardt
Gear	Settings
Refresh	Platinum Interface
Question Mark	Help
Logout	Logout

TRAINING RESOURCES IN CHROME RIVER



The screenshot displays the Chrome River Help Center interface. At the top, the "CHROMERIVER" logo is visible in a black header. Below the header, the main content area has a blue background with the text "Welcome to the Chrome River Help Center" in large white font. Underneath, it says "Information, Tutorials, FAQs and More" in a smaller white font. A search bar with the placeholder text "Search" and a magnifying glass icon is positioned in the center. At the bottom, there are three circular icons with corresponding labels: "Getting Started" (with a CR logo), "Create A Report" (with a wallet icon and a plus sign), and "Email Receipts" (with an envelope icon). The browser's address bar and status bar are visible at the very bottom, showing a 69% zoom level.



Quick-Start Video

Get up and running with Chrome River MERCURY in just a few minutes as you learn how to navigate, how to start a new report, and where to find your expenses, receipts and transactions.

The screenshot shows the Chrome River MERCURY dashboard. The top navigation bar includes a hamburger menu, the 'CHROMERIVER' logo, a '+ New' button, and a user profile for 'Alan Rich'. The main dashboard area is divided into two sections: 'APPROVALS' and 'EXPENSES'. The 'APPROVALS' section shows 'Approvals Needed' with '12 Expense Reports'. The 'EXPENSES' section shows a summary with '4 Draft', '1 Returned', and '3 Submitted Last 90 Days' items. A video player overlay is positioned on the right side of the dashboard, displaying the 'THE CRANE COMPANY' logo and contact information. The video player controls at the bottom show a progress bar at 0:00 / 4:33, a volume icon, a full screen icon, and a download icon.

APPROVALS
Approvals Needed
12 Expense Reports

EXPENSES
4 Draft
1 Returned
3 Submitted Last 90 Days

THE CRANE COMPANY

C O N T A C T

For Expense reimbursement and Invoice processing assistance, please contact:

- > Accounts Payable Support (888) 268-9101 [Email Us](#)
- > Credit Card Support (888) 268-9102 [Email Us](#)
- > Accounts Payable Manager (888) 268-9103 [Email Us](#)

N O T I C E S

UPDATE: New Expense Policy Limits
The new expense policy, which is available online in the HELP section below, has a new limits on Airline Club memberships.

REMINDER: Emailing Receipts to Your Account
You have an option to email any receipt to expensmemo@chromeriver.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.

0:00 / 4:33

[Back to Top](#)



STAY INFORMED OF NEW DEVELOPMENTS

Updates on Project Recharge will continue as it progresses

- Targeted updates to specific audiences
- Updates from us: Meetings and infoshares
- More information, timeline, and continuous updates: uits.iu.edu/projectrecharge
- Direct questions on this project: recharge@iu.edu