

Chrome River Non-Employee Vendor Lookup

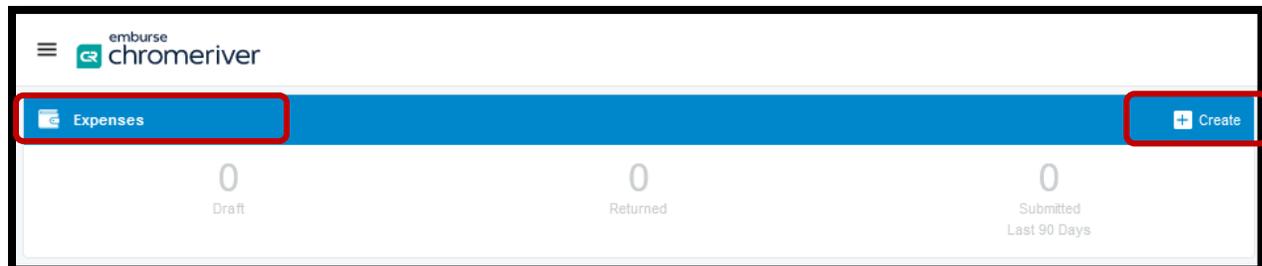
These procedures show an end-user how to look in the Finance System or the Chrome River System to see if a Non-Employee Vendor (student or outside party) is already setup in Chrome River for an expense report to be entered on their behalf.

If you have any questions on this process, please contact Sandy Evick at 8/2941 or evicksj@jmu.edu

Chrome River System Lookup

Any full-time or part-time JMU employee (with the exception of Student Employees and Affiliate employees) can login to the Chrome River System to determine if a Non-Employee Vendor is already enrolled.

- Login to <https://app.chromeriver.com/login/sso/saml?CompanyID=jmu.edu> using your eID and password to access the system.
- Create a dummy expense report header to determine if your Vendor is enrolled by clicking on '+ Create'



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- Select 'Outside Party' or 'Student' as the Type of Traveler and then open up the dropdown box in the Non-Employee field. This is a running list of all Chrome River Non-Employee Vendors, sorted alphabetically and it includes their PeopleSoft Finance Vendor ID. Note that the same list populates for both outside parties and students, as it is a combined list of both Vendor types.
- If the Vendor you need to enter an expense report for is not in this list, you will need to complete a Non-Employee Vendor Enrollment form on their behalf
- If the Vendor you need to enter an expense report for is on this list, you are all set to proceed with creating an expense report on their behalf.

Expenses For Brittany Sherman

Report Name	<input type="text"/>
Pay Me In	USD - US Dollars
Report Type	-- Select --
Report Purpose	-- Select --
Type of Traveler	-- Select --
Non Employee	-- Select --
Travel Start	<input type="text"/>
Travel End	<input type="text"/>
Business Days	0

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Finance System Lookup

If you have PeopleSoft Finance System access, you can do a quick review of the Vendor in question to determine if they are already in the Chrome River System. If they are already in the system, and no update is required to their address (relevant for outside parties only) then you will not need to fill out a Non-Employee Vendor Enrollment Form.

Step 1 – Access the Supplier (Vendor) Information Page

- Login to Finance using your eID/Password and navigate to the Supplier Information page.

Main Menu -> Suppliers -> Supplier Information -> Add/Update -> Add/Update Supplier

Supplier Information
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ **Search Criteria**

SetID =

Supplier ID begins with

Persistence =

Short Supplier Name begins with

Our Customer Number begins with

Supplier Name begins with

Include History Correct History Case Sensitive

[Basic Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

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Step 2 – Search for your Supplier (Vendor)

- Make sure that JMDSN is entered as the value in the field 'SetID'.
- To search by a Supplier ID (PS #), enter that ID number in the empty box to the right of the field 'Supplier ID' and click search. A Supplier ID is 10 digits long, so you will need to use leading zeros.
- To search by a Supplier's name, go to the field 'Name 1' and change the dropdown selection from 'begins with' to 'contains'. Enter the Supplier's full name, or portion of the name in the empty box to the right of the dropdown menu and click search. This is the most common way to search, and can be used when you are not sure if a Supplier is in the system or not.

Supplier Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ **Search Criteria**

SetID =

Supplier ID begins with

Persistence =

Short Supplier Name begins with

Our Customer Number begins with

Supplier Name begins with

Include History
 Correct History
 Case Sensitive

[Basic Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

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Step 3 – Review Search Results for Supplier (Vendor)

- If the Vendor you have searched for is not in the system, then you will need to complete a Non-Employee Vendor Enrollment form on their behalf. This form will serve the purpose of getting the Vendor setup in both the Finance System, and in Chrome River.

Supplier Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

Search Criteria

SetID =

Supplier ID begins with

Persistence =

Short Supplier Name begins with

Our Customer Number begins with

Supplier Name begins with

Include History
 Correct History
 Case Sensitive

Search Results

View All 1-5 of 5

SetID	Persistence	Our Customer Number
JMDSN	Regular	(blank)

[Find an Existing Value](#) | [Add a New Value](#)

- If the Vendor you have searched for is in the system, click on any of the fields displayed for their row to enter the Vendor record and determine if they are in Chrome River.

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- The combination of **Status = Approved** and **Non-Employee Traveler = Yes** indicates that this Vendor is already in Chrome River.
- If either one of those values are something different, your Vendor is not in Chrome River and a Non-Employee Vendor Enrollment Form needs to be completed on their behalf.

The screenshot displays a vendor lookup interface with the following details:

Field	Value
SetID	JD
Supplier ID	[Redacted]
Supplier Short Name	[Redacted]
Supplier Name	[Redacted]
Order	[Redacted]
W9 Date	[Redacted]
Status	Approved
Persistence	One Time
Classification	Outside Party
Non-Employee Traveler	Yes
Open for Ordering	Yes
Withholding	No
VAT	No
Last Modified By	EVICKSJ
Last modified date	01/04/2022 3:02PM
Created By	EVICKSJ
Created Date/time	01/04/2022 3:02PM
Last Activity Date	01/04/2022

Buttons: Save, Return to Search, Notify, Add, Update/Display, Include History, Correct History

Navigation: Summary | Identifying Information | Address | Contacts | Location