



Chrome River User Manual

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EXPENSE REPORT - IMPORT PRE-APPROVAL

Pre-Approvals are required for Out-of-State and International travel per policy 3.28 / Out-of-State Travel. The final approved Pre-Approval must be attached to the Expense Report.

Chrome River provides three options for associating a pre-approval to an expense report:

Import Pre-Approval: – this option is accessed on the expense report header. Selecting this option will import and populate header information and expense line details from the selected pre-approval report. Each expense line on the expense report will require validation.

Add Pre-Approval: – this option is available any time after the expense report header has been created and saved.

Link Pre-Approval: – this option is accessed on the Submit Confirmation screen and is available after the expense report has been created and expense lines have been added to the report. Utilizing this option will not pull in header or expense line information from the pre-approval to the expense report.



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Import Pre-Approval

Click the **Import Pre-Approval** button.

The screenshot shows a web form titled "Expenses For Wu Shock". At the top right are "Cancel" and "Save" buttons. Below the title, there is a section for "Import from Pre-Approval" with a sub-label "Optional". A button labeled "IMPORT PRE-APPROVAL" is highlighted with a yellow arrow. Below this are input fields for "Report Name", "Business Purpose", and a "Report Type" dropdown menu currently set to "-- Select --".

Click the **Select a pre-approval report** drop-down and select the pre-approval you wish to tie this expense report to.

The screenshot shows a dialog box titled "Import Pre-Approval" with a close button (X) in the top right. It contains a dropdown menu labeled "Select a pre-approval report" with a yellow arrow pointing to it. Below the dropdown is a table with the following data:

REPORT NAME	ORIGINAL AMT	REMAINING
C.R. Conference 5/6/19-5/10/19	2,940.00USD	1,157.68USD
ACT Conference 6/17/19-6/21/19	2,500.00USD	2,500.00USD

A yellow arrow points to the first row of the table.



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Chrome River will only allow users to select pre-approvals that are both:

- fully-approved
- not expired, which means there is still a balance remaining on the pre-approval

Pre-approval amounts are reduced by any expense reports that have been submitted or approved, but not expense reports in draft status. When the total amount of all submitted or approved expense reports exceeds the pre-approval amount, the pre-approval becomes expired, and no future expense reports can be submitted against it.



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Once a pre-approval report is selected, a summary of the pre-approval will be displayed. Click the **Import** button.

Import Pre-Approval ✕

C.R. Conference 5/6/19-5/10/19 ▼

Report Summary

From Date 05/06/2019

To Date 05/10/2019

Business Purpose

Expense Summary

	REMAINING (USD)	SPENT (USD)
Airfare	0.00	0.00
Baggage Fee	60.00	0.00
Conference Registration / Training	445.00	0.00
Hotel	1,050.00	0.00
Mileage / Private Vehicle	0.00	0.00
Single Day Travel	56.40	0.00
Other	0.00	0.00
Total	1,611.40	0.00

Allocations

D10252-101510-01620 D10252: RU Controller's Office
101510: Financial Operations
0000_Pre-Approval 2,940.00

Import



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Once you click **Import**, all of the pre-approval's line-item data will be added to the expense report.
Note: Verify that the **Departure Date** and **Return Date** fields populate correctly. If the dates populate incorrectly, update the fields before proceeding.

Expenses For Wu Shock

Report Name	C.R. Conference 5/6/19-5/10/19
Business Purpose	Conference
Report Type	Travel
Departure Date	5/6/2019
Return Date	5/10/2019
Destination	United States / California / Bev ...
Traveler Type	Employee
Travel Type	Out of State
Are you attending a Conference?	Yes

Remember to attach a copy of the Agenda/Schedule at a glance when submitting this report.

Will there be personal time during this trip?

Pre-Approval Expense Summary

Pre-Approval Report Applied

- X C.R. Conference 5/6/19-5/10/19

	REMAINING (USD)	SPENT (USD)
Airfare	0.00	0.00
Baggage Fee	60.00	0.00
Conference Registration / Training	445.00	0.00
Hotel	1,050.00	0.00
Mileage / Private Vehicle	0.00	0.00
Single Day Travel	56.40	0.00
Other	0.00	0.00
Total	1,611.40	0.00

This information populated when the pre-approval was imported.

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Add Pre-Approval

To add a pre-approval after the expense header has been created and saved, return to the expense report header screen. Click the **Add Pre-Approval Report** button in the **Import from Pre-Approval** field.

Report Name	Receipt Demonstration
Business Purpose	Receipt Demonstration
Report Type	Travel
Departure Date	03/12/2019
Return Date	03/15/2019
Destination	United States / Colorado / Pine
Traveler Type	Employee
Travel Type	Out of State
Are you attending a Conference?	No
Will there be personal time during this trip?	<input type="checkbox"/>
Import from Pre-Approval	ADD PRE-APPROVAL REPORT

Comments (0)

Add Comment

Post



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On the **Apply Pre-Approval** screen, click the **Select a pre-approval report** drop-down and select the pre-approval you wish to tie this expense report to.

Check the **Import Line Items from Pre-Approval Report** box if you want all lines from the pre-approval to be imported into the expense report. Unchecking this box will link the pre-approval to the expense report without importing the line items.

Tap the **Apply** button to attach the pre-approval to the expense report.

Apply Pre-Approval

C.R. Conference 5/6/19-5/10/19

Import Line Items from Pre-Approval Report

Report Summary

From Date 05/06/2019

To Date 05/10/2019

Business Purpose

Expense Summary

0000-Pre-Approval

Apply

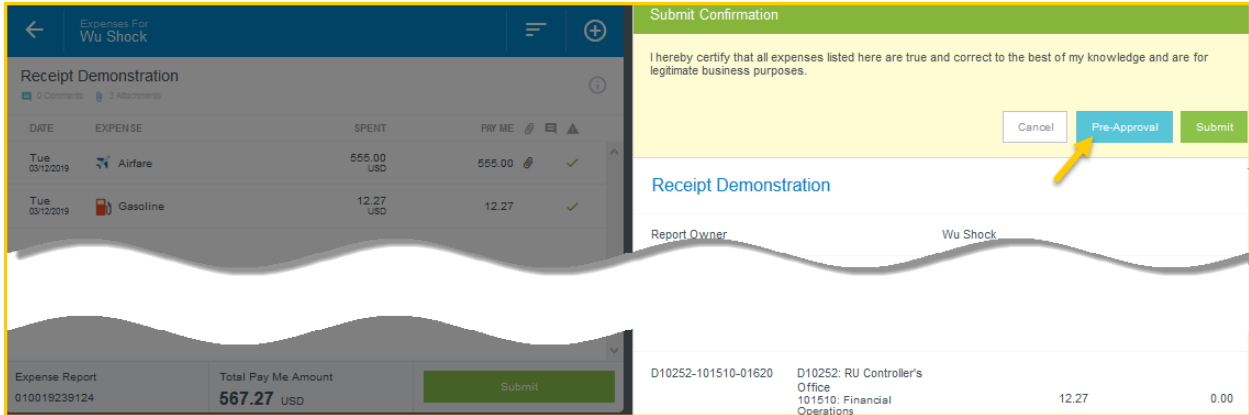
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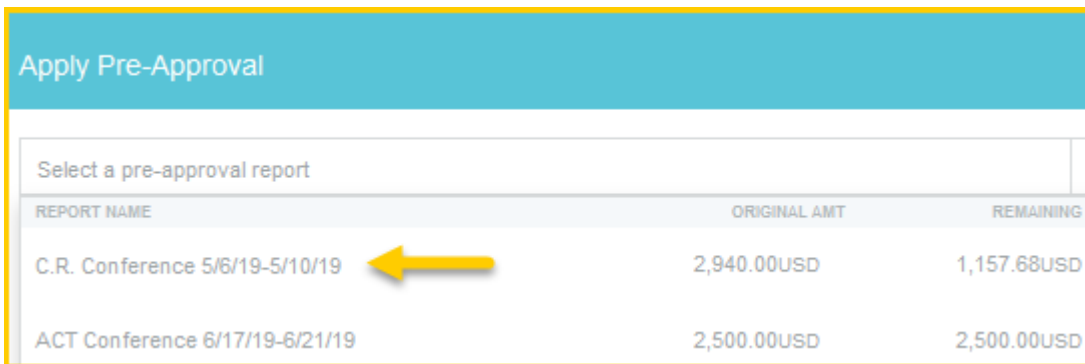
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Link Pre-Approval

Once an expense report has been created and is ready to submit, click on the **Pre-Approval** button on the **Submit Confirmation** page.



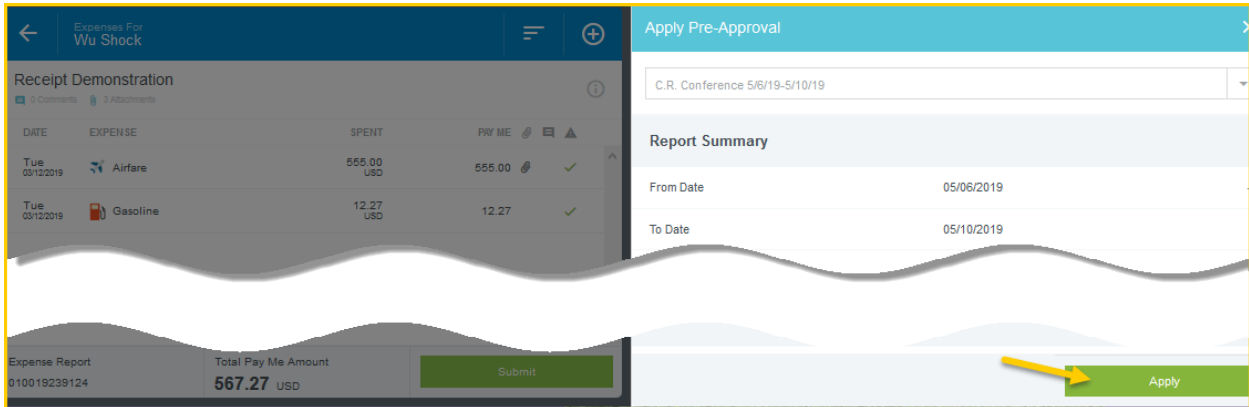
On the Apply Pre-Approval screen, click the **Select a pre-approval report** drop-down and select the pre-approval you wish to tie this expense report to.



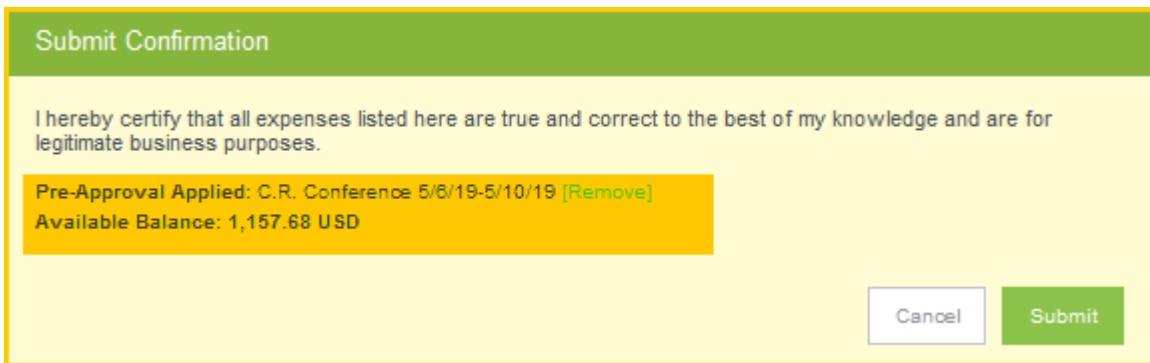
Tap the **Apply** to attach the pre-approval to the expense report.



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The submit confirmation page displays the applied pre-approval's report name and available balance.



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Remove Pre-Approval

To remove an applied pre-approval, click on the **Remove** link next to the pre-approval report name.

The screenshot shows a 'Submit Confirmation' dialog box with a green header. The main text reads: 'I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.' Below this, it states 'Pre-Approval Applied: C.R. Conference 5/6/19-5/10/19 [Remove]' with a yellow arrow pointing to the '[Remove]' link. Underneath, it says 'Available Balance: 1,157.68 USD'. At the bottom right, there are two buttons: 'Cancel' and 'Submit'.

The system provides confirmation that the pre-approval was removed.

The screenshot shows the same 'Submit Confirmation' dialog box. The main text is the same. However, the text now reads 'Pre-Approval removed' with a yellow arrow pointing to it. The buttons at the bottom are 'Cancel', 'Pre-Approval', and 'Submit'.

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View Attached Pre-Approval Report

The details of any pre-approval report linked to an expense report can be viewed by tapping the **PDF** download button next to the name of the Applied Pre-Approval Report on the expense report.

The screenshot displays a user interface for a Receipt Demonstration report. At the top, there are buttons for 'Open', 'PDF', 'Tracking', and 'Recall'. Below these is the title 'Receipt Demonstration' and a list of report details: Report Owner (Wu Shock), Submit Date (06/22/2019), Expense Report ID (010019239124), and Business Purpose (Receipt Demonstration). A decorative wavy line separates this section from the 'Applied Pre-Approval Report' section. This section contains a table with columns for DATE, REPORT NAME, and AMT (USD). The table has one row: 05/22/2019, C.R. Conference 5/6/19-5/10/19, and 2,349.59. A yellow arrow points to a 'PDF' download button next to the report name. Below the table is a 'Remaining Balance' of 590.41.

DATE	REPORT NAME	AMT (USD)
05/22/2019	C.R. Conference 5/6/19-5/10/19	2,349.59

Remaining Balance: 590.41



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The pre-approval pdf will open in a new window.

Pre-Approval Report

C.R. Conference 5/6/19-5/10/19
 Report ID: 0100-0032-8904

REQUESTER	Wu Shock	EXPENSE DATES	05/06/2019 - 05/10/2019
REQUESTER ID	Wushock	SUBMIT DATE	05/22/2019
CREATED BY	[REDACTED]	TO BE PAID IN	USD

Prior Approvers

05/22/2019	[REDACTED]	[REDACTED]	
05/22/2019	[REDACTED]	[REDACTED]	

Expense Summary

EXPENSE TYPE	ESTIMATED AMT (USD)
Airfare	500.00
Baggage Fee	60.00
Conference Registration / Training	1,000.00
Hotel	1,050.00
Single Day Travel	330.00
Subtotal	2,940.00

Allocation Summary

FUNDING		ESTIMATED AMT (USD)
D10252-101510-01620	101510: Financial Operations D10252: RU Controller's Office 0000-Pre-Approval	2,940.00
Subtotal		2,940.00

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Detaching Pre-Approvals

Pre-Approvals will be unlinked from any expense report that has been deleted, allowing users to reattach them to a new report, as necessary.

When an expense report with attached pre-approval is recalled or reset, the pre-approval will remain attached to the report. To detach the report, locate the expense report and click the **Open** button.

The screenshot shows the Chrome River interface for an expense report. At the top, there are buttons for 'Open', 'Delete', 'PDF', and 'Submit'. A yellow arrow points to the 'Open' button. Below the buttons is the 'Receipt Demonstration' section, which includes fields for 'Report Owner' (Wu Shock), 'Expense Report ID' (010019239124), and 'Business Purpose' (Receipt Demonstration). Below this is the 'Financial Summary' table:

	AMOUNT (USD)	APPROVED (USD)
Total Expense Reported	567.27	0.00
Amount Due Employee	567.27	0.00

Below the financial summary is the 'Applied Pre-Approval Report' table:

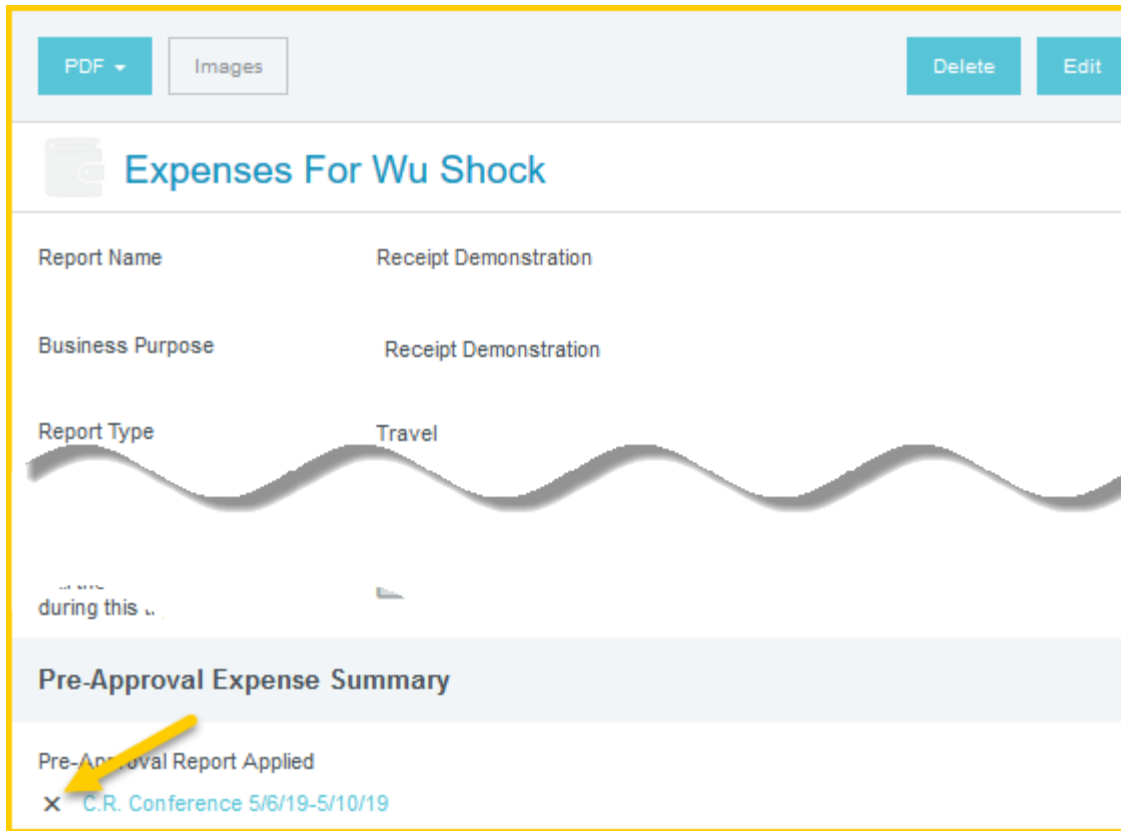
DATE	REPORT NAME	AMT (USD)
05/22/2019	C.R. Conference 5/6/19-5/10/19	1,782.32

A 'PDF' button is located next to the pre-approval report name.

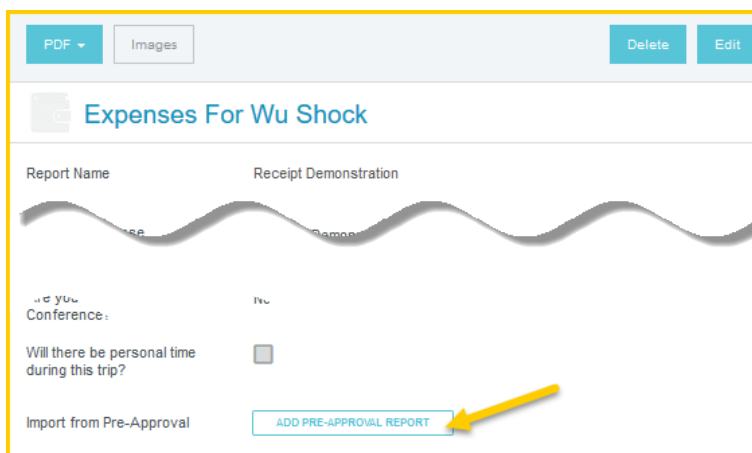
In the pre-approval expense summary section, click on the **X** next to the pre-approval report name.



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The pre-approval is detached from the expense report. The Pre-Approval Expense Summary section is no longer displayed. The **Add Pre-Approval Report** button is now displayed.



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