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:

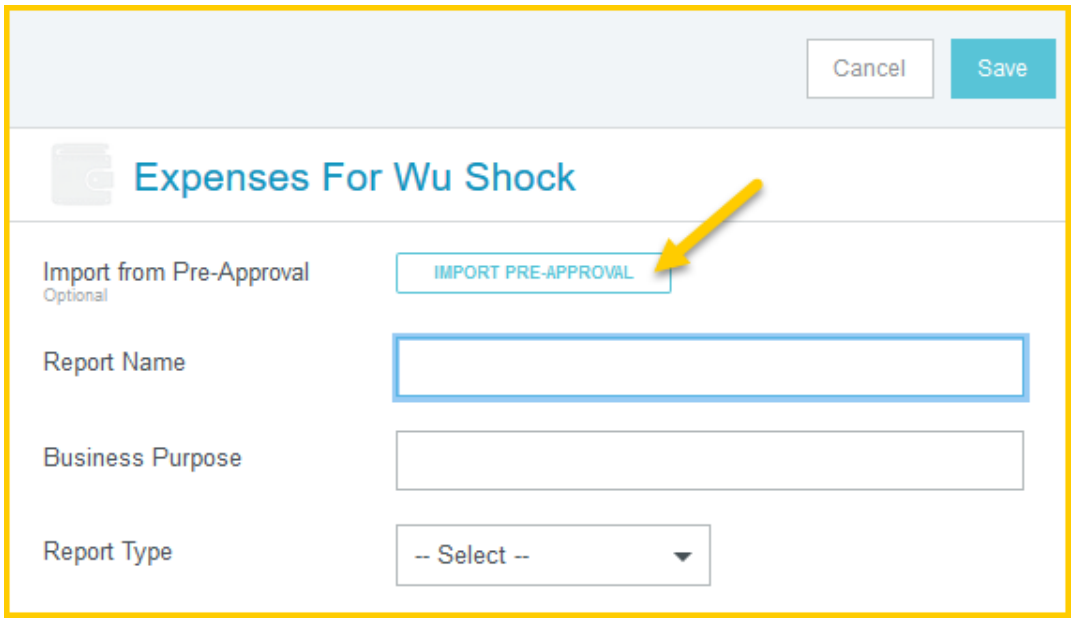
Import Pre-Approval: – this option is accessed on the expense report header. Selecting this option will import and populate header information and expense line details from the selected pre-approval report. Each expense line on the expense report will require validation.

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

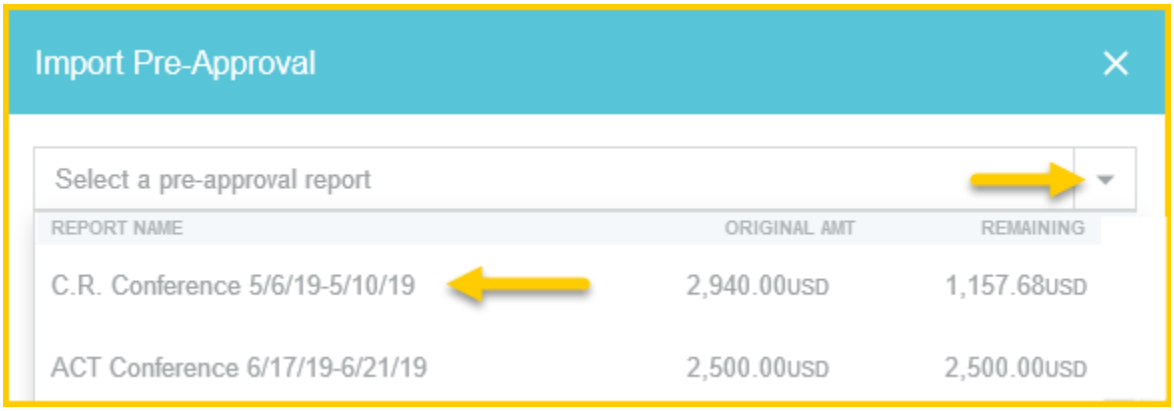
Link Pre-Approval: – this option is accessed on the Submit Confirmation screen and is available after the expense report has been created and expense lines have been added to the report. Utilizing this option will not pull in header or expense line information from the pre-approval to the expense report.

Import Pre-Approval

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



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

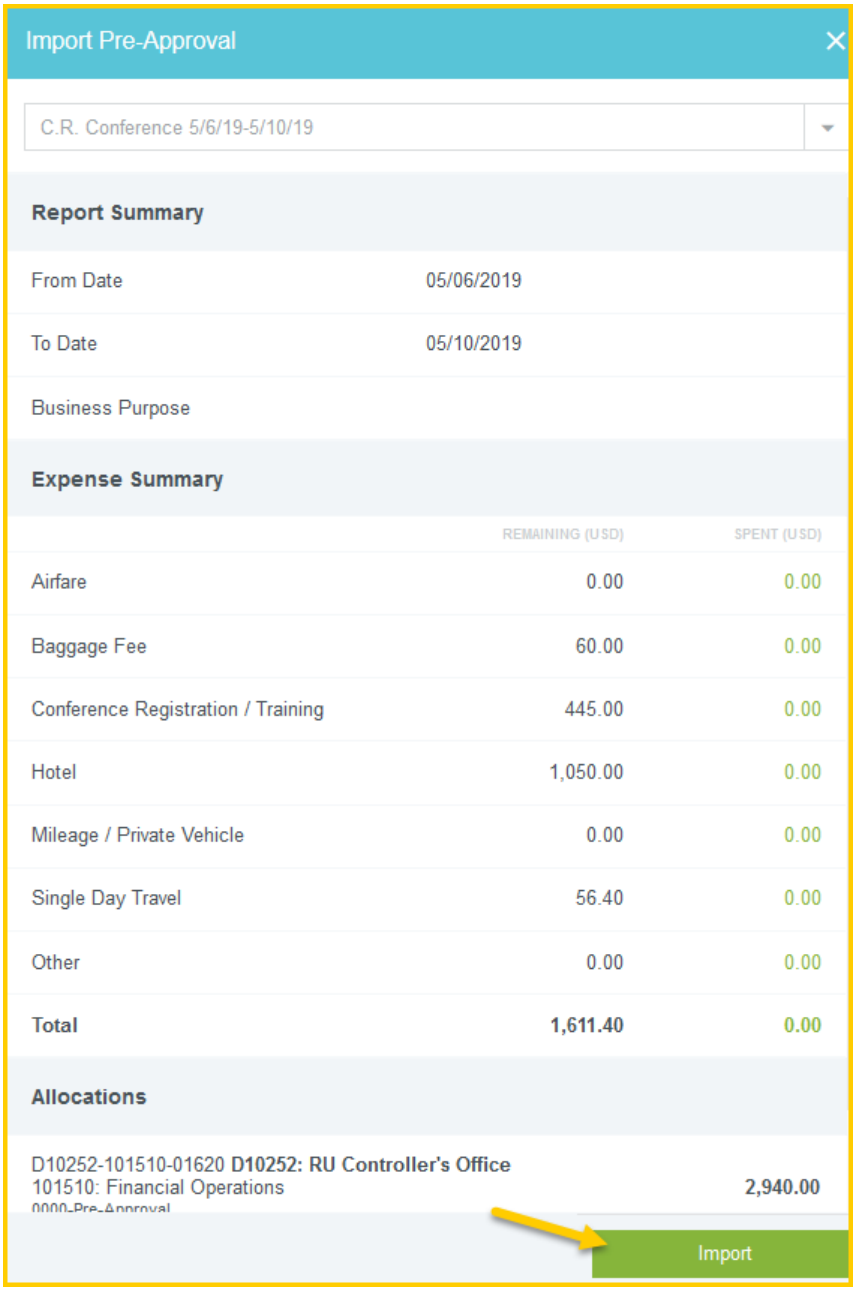


Chrome River will only allow users to select pre-approvals that are both:

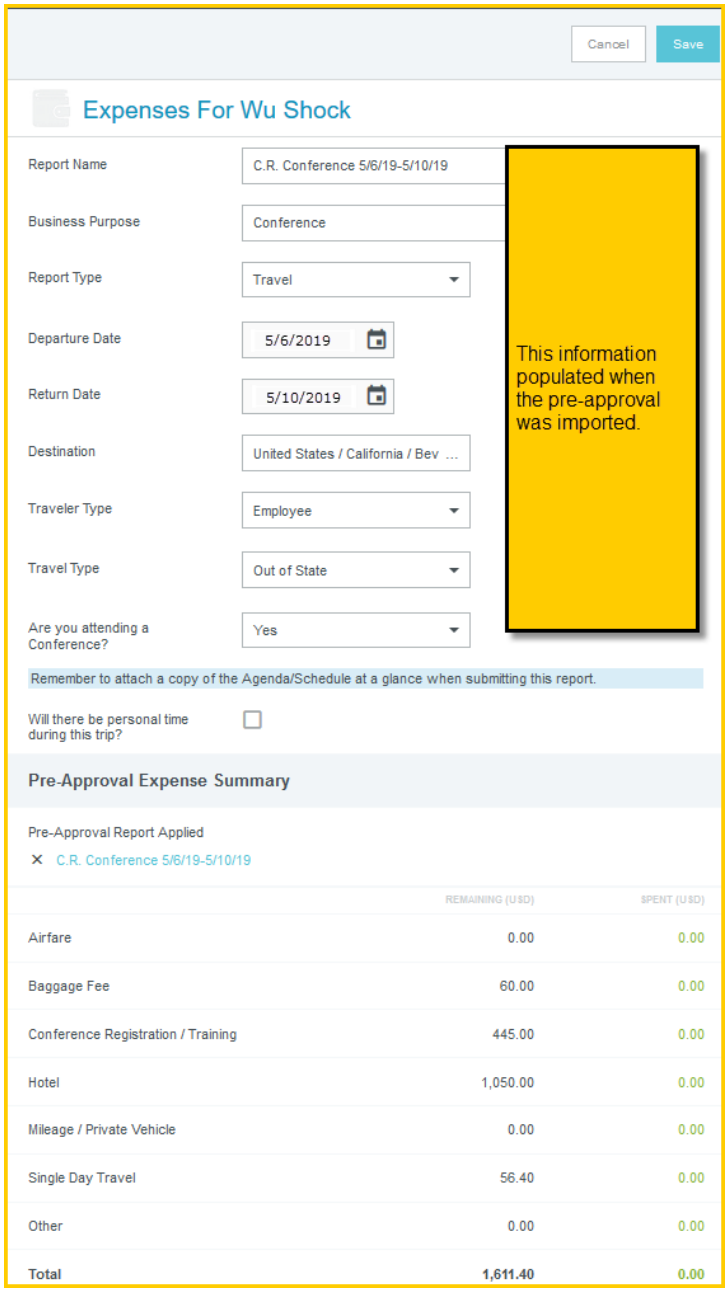
- fully-approved
- not expired, which means there is still a balance remaining on the pre-approval

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.

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



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.



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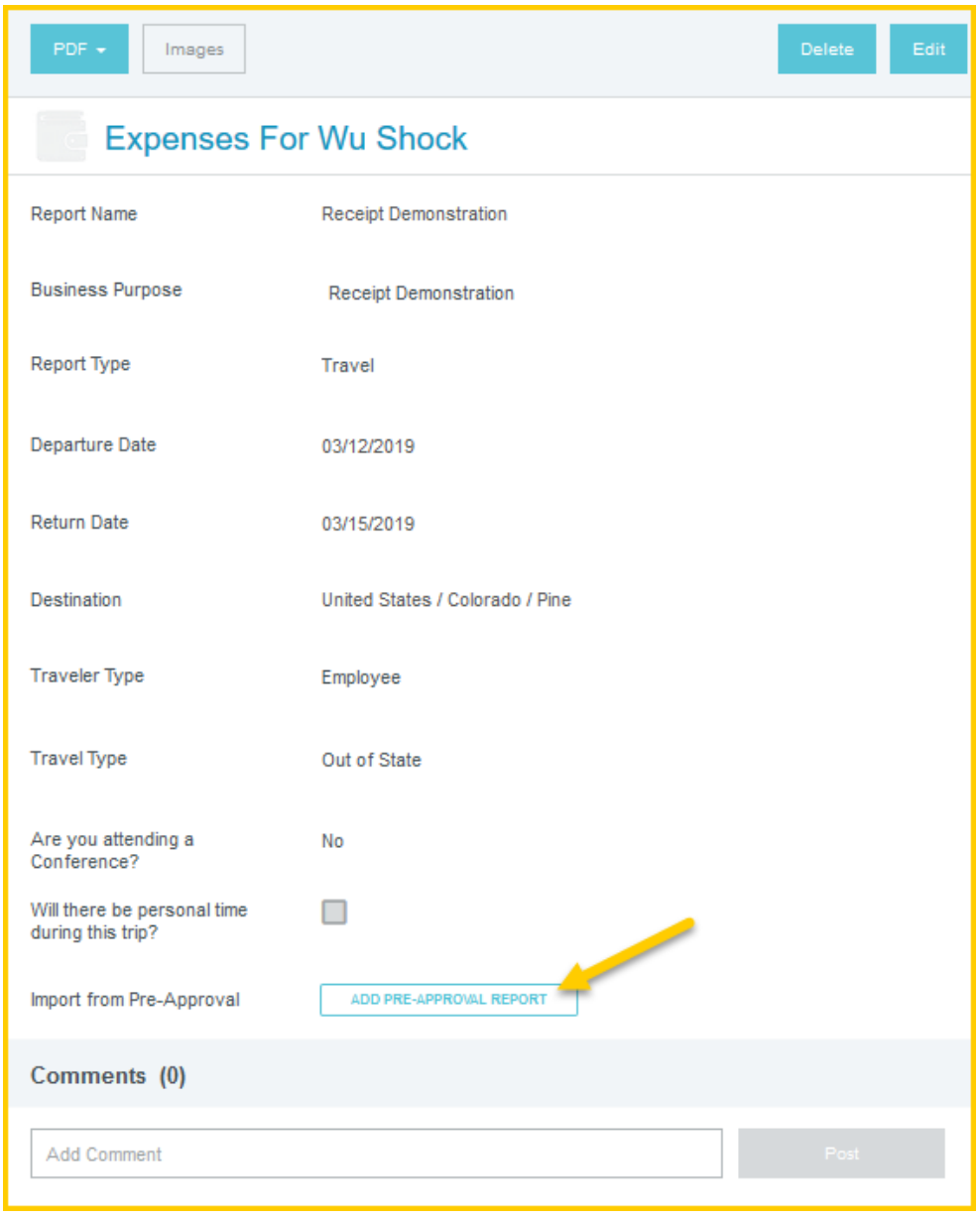
Add Pre-Approval

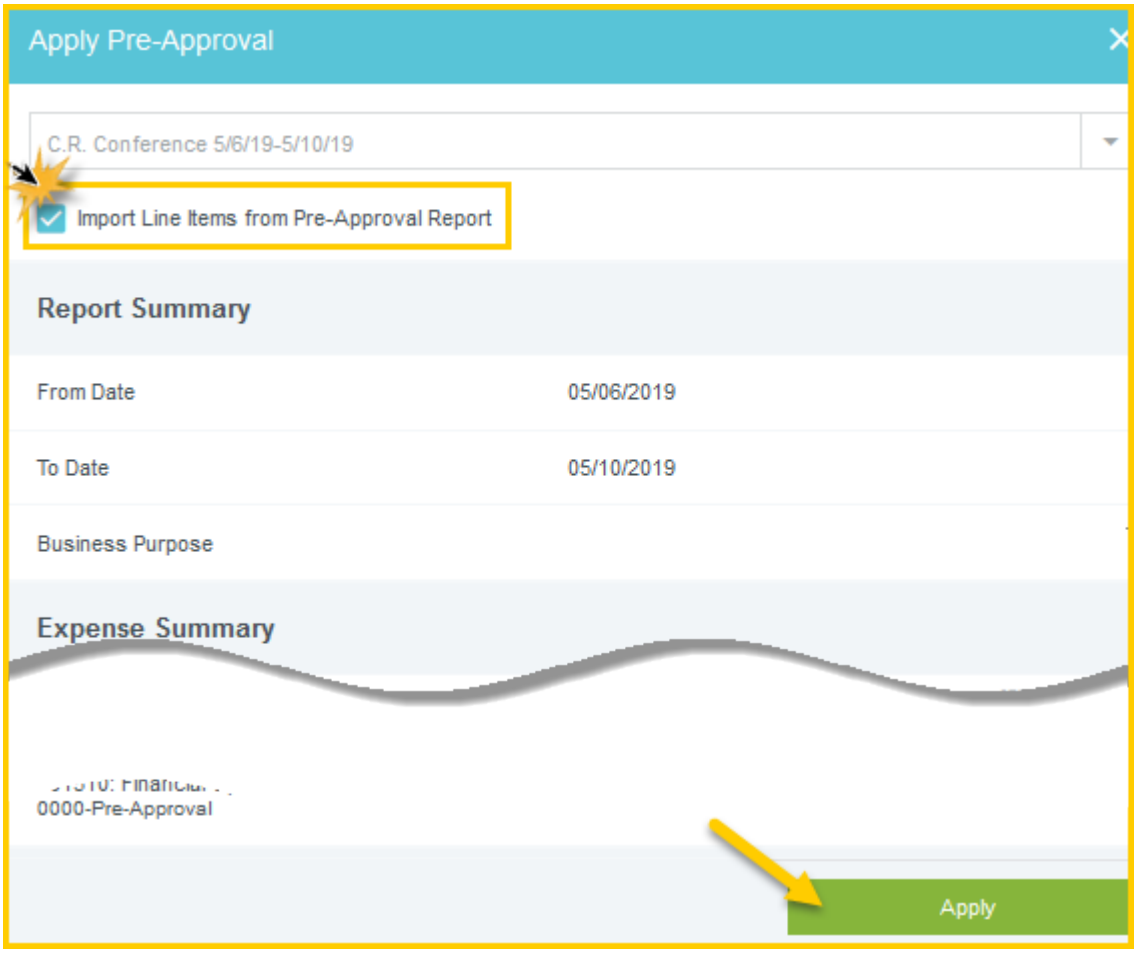
To add a pre-approval after the expense header has been created and saved, return to the expense report header screen. Click the **Add Pre-Approval Report** button in the **Import from Pre-Approval** field.



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.



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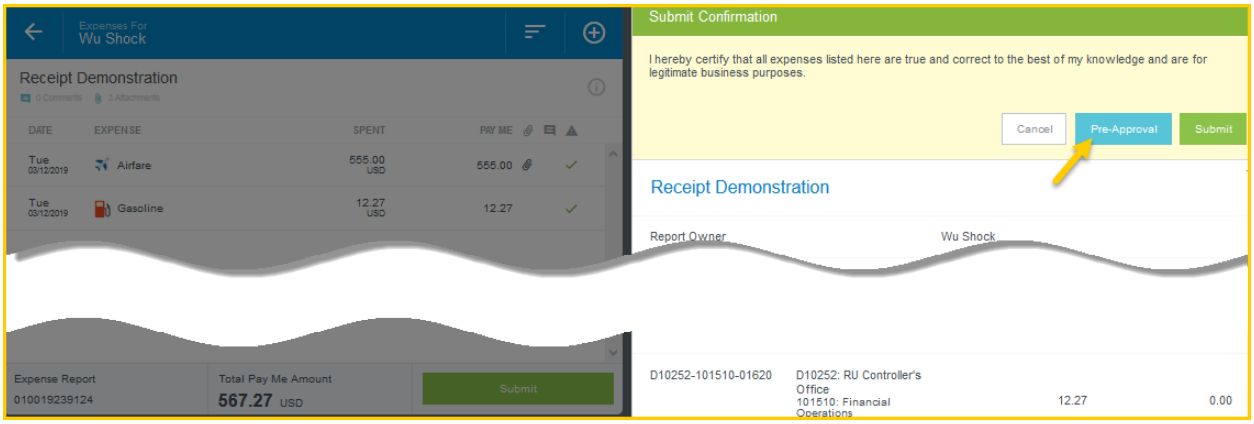
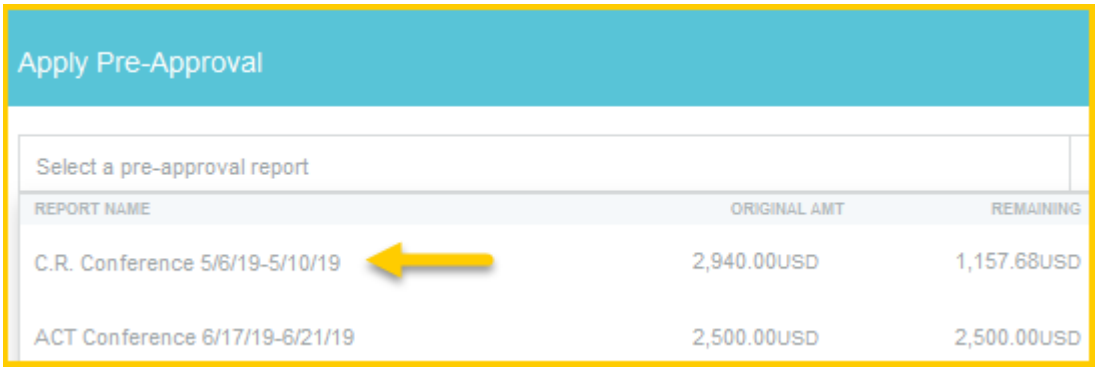
Link Pre-Approval

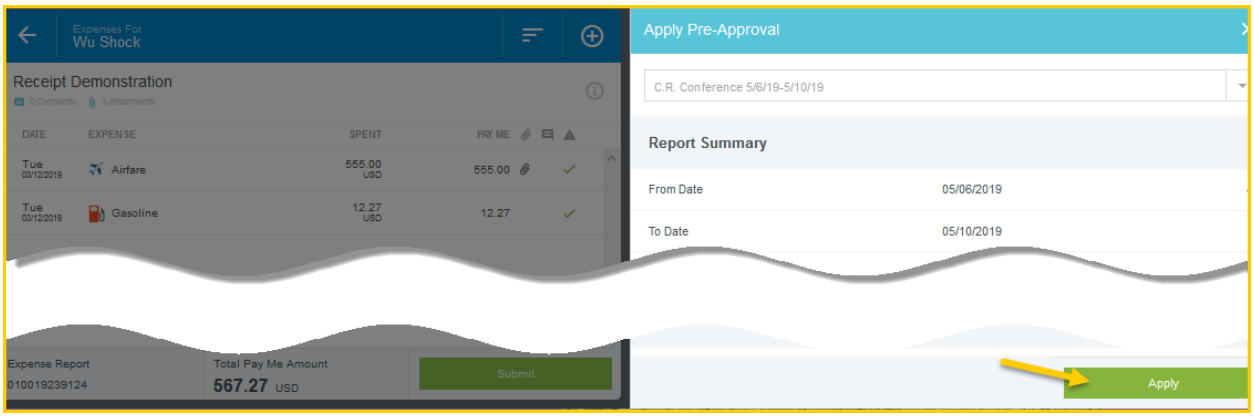
Once an expense report has been created and is ready to submit, click on the **Pre-Approval** button on the **Submit Confirmation** page.



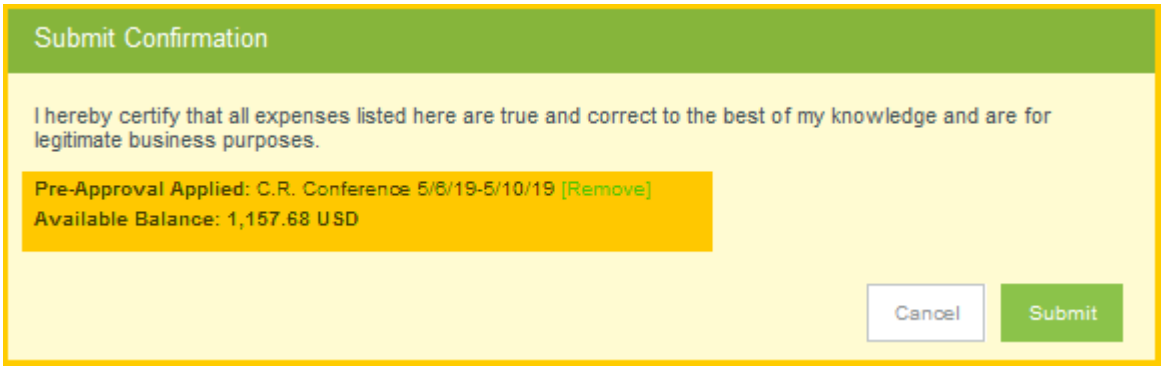
On the Apply Pre-Approval screen, click the **Select a pre-approval report** drop-down and select the pre-approval you wish to tie this expense report to.



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



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



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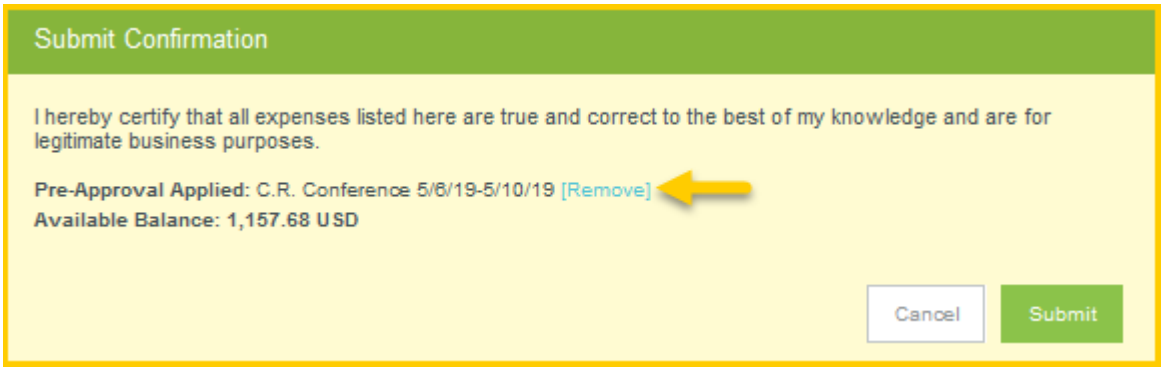
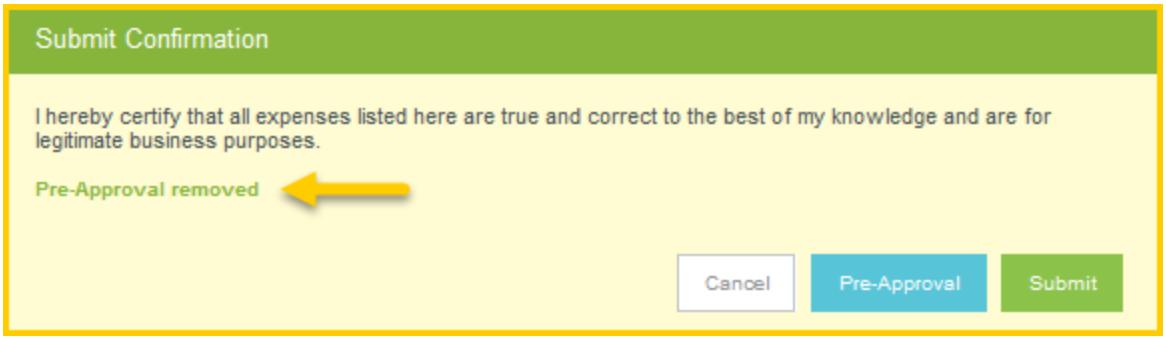
Remove Pre-Approval

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



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



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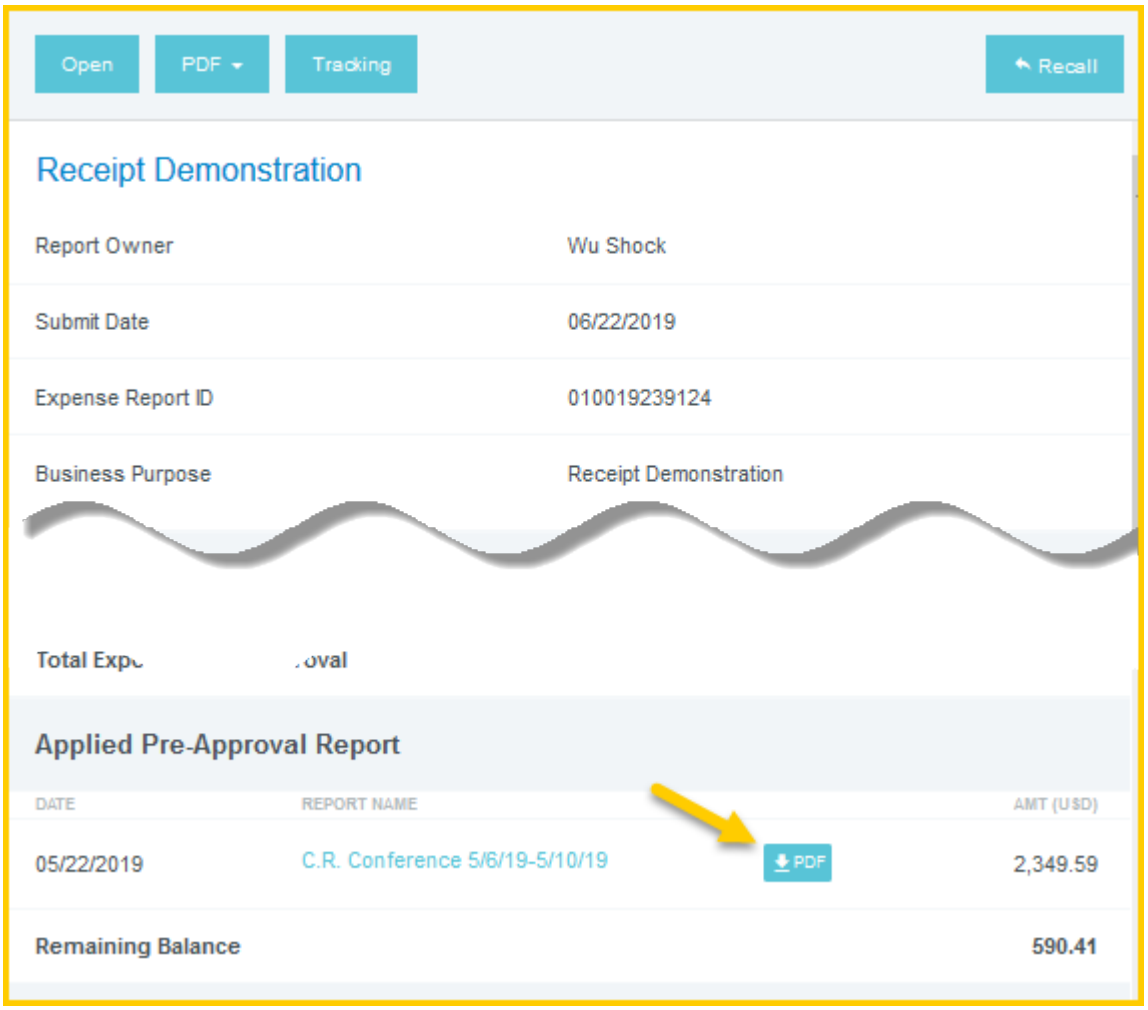
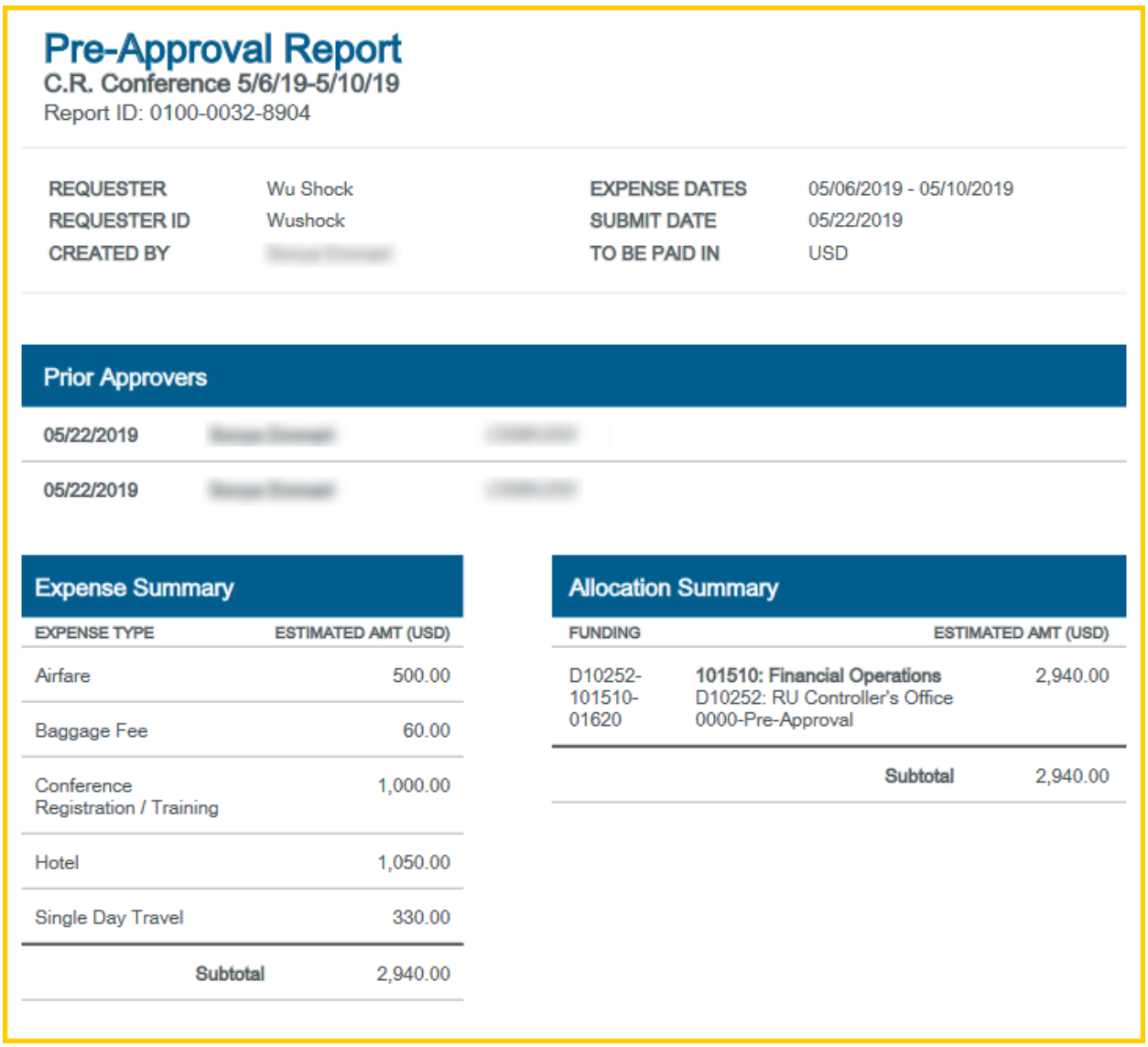
View Attached Pre-Approval Report

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 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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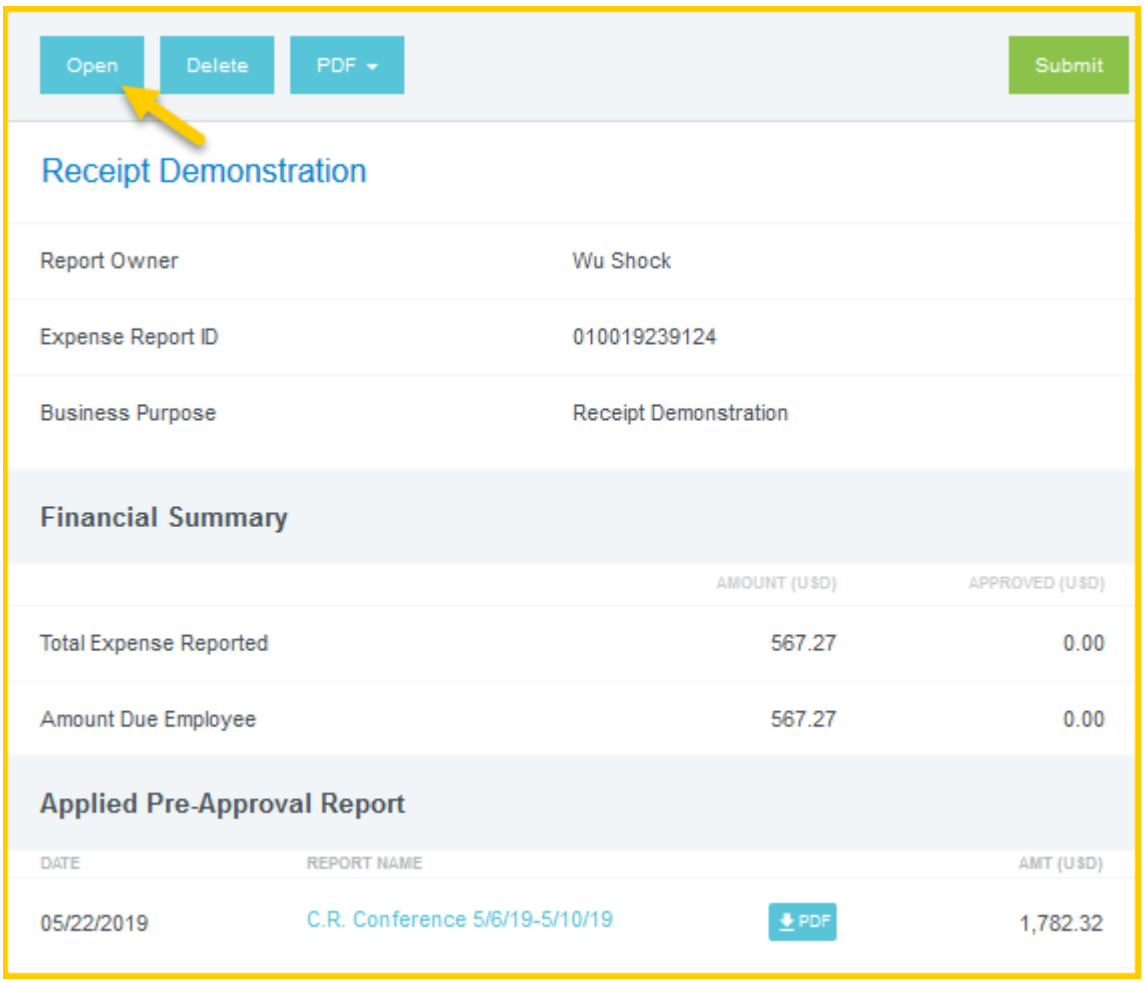
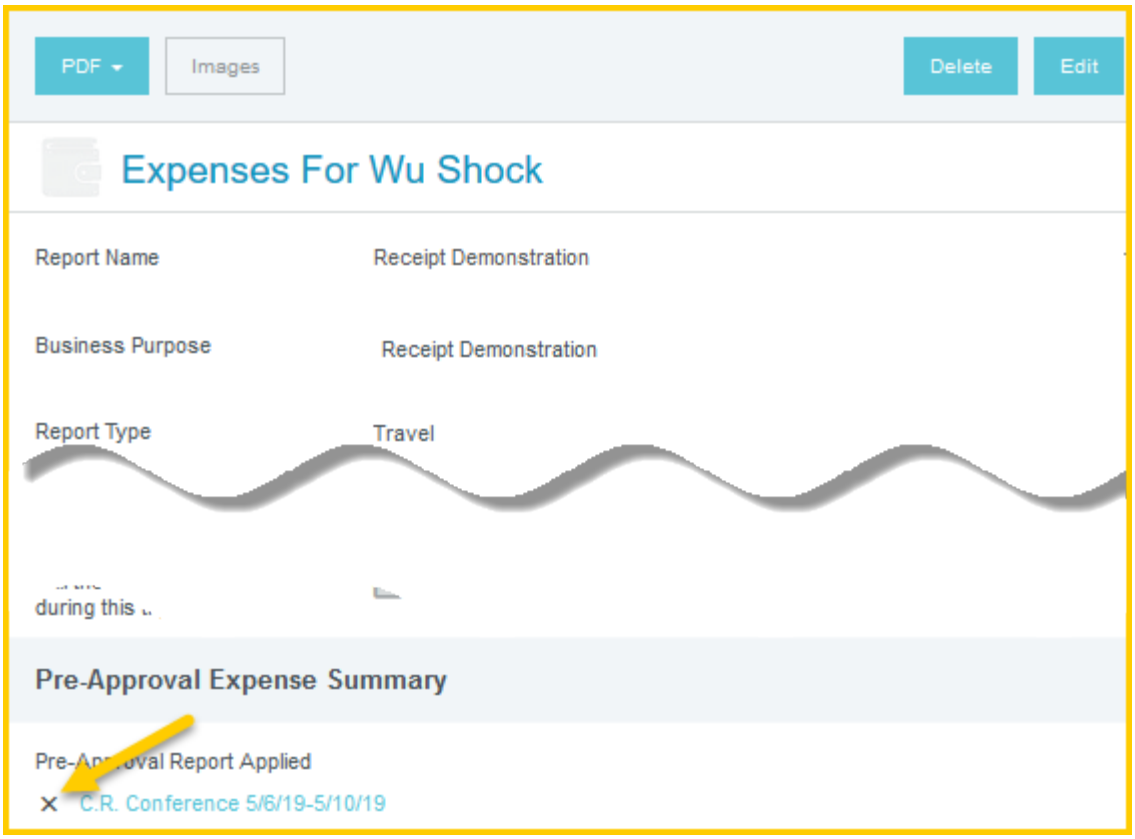
Detaching Pre-Approvals

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

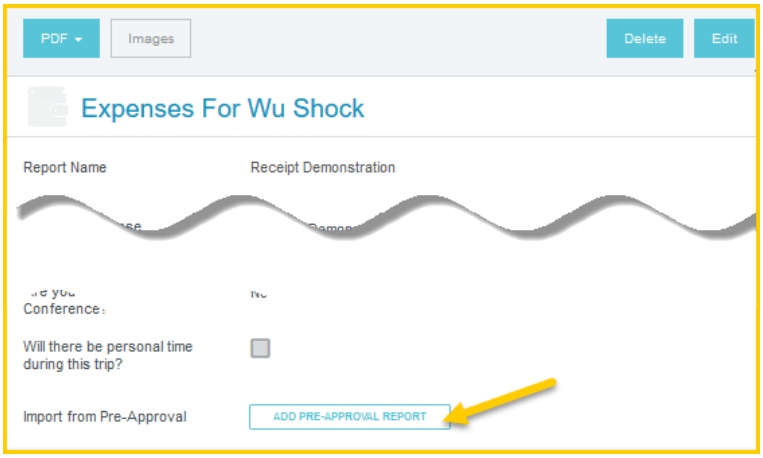
When an expense report with attached pre-approval is recalled or reset, the pre-approval will remain attached to the report. To detach the report, locate the expense report and click the **Open** button.



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



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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