APPROVALS

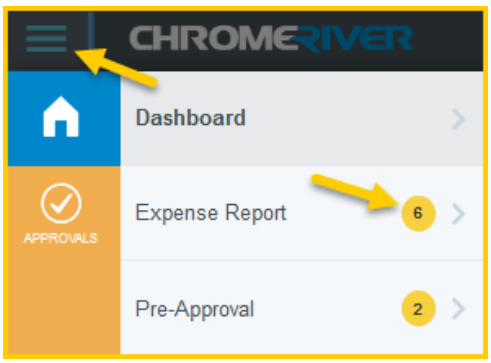
Approvers will receive email notification informing that a pre-approval or expense report has been sent to them for approval. Reports can be approved or returned directly from the email or from within the application. Most details of a report are contained in the email, including receipts; however, the ability for an approver to adjust a report is only available from within the application.

Reports will be routed automatically to additional approvers based on the routing rules set in the system. If an approver in the chain returns a report and the report is resubmitted by the expense owner, it will route back to the approver that returned it; the report will not require approval from previous approvers.

From within the application:

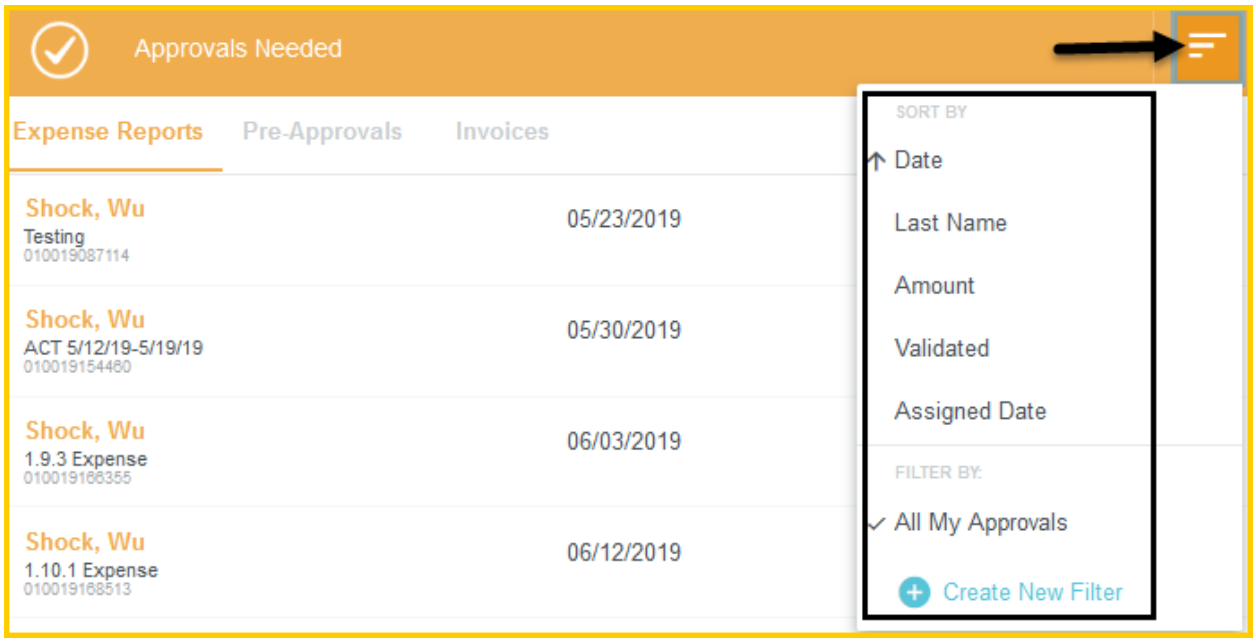
A yellow notification bar at the top of the Dashboard will indicate that you have reports that are awaiting your approval.

You may also access your approvals by clicking the **MENU** button and selecting Approvals. The yellow circle shows the number of approvals waiting for you.



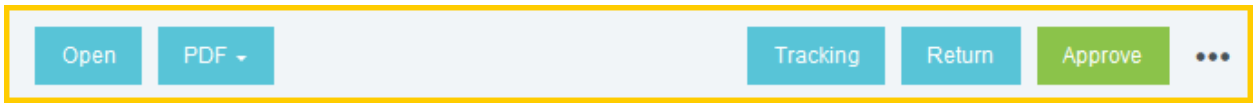
Once in the Approval List, you will be presented with a list of reports awaiting your approval.

- You can use the SORT button in the upper right-hand corner to sort the list by Date, Last Name, Pay Me Amount or Validated status.

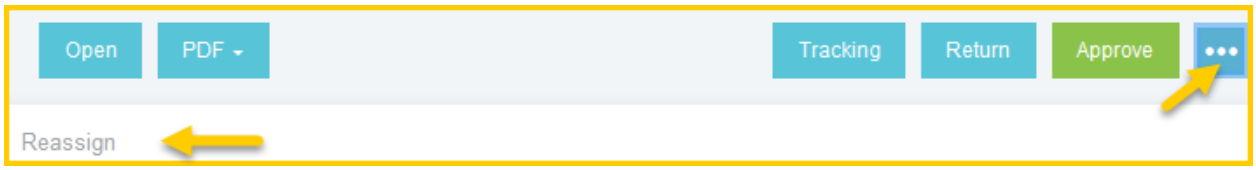


Click once on the report you wish to review. A preview of the report will appear on the right side of the screen. From preview you can perform the following functions:

- Open the report
- Print the report (PDF)
- View the tracking of the report
- Return the report
- Approve the report



Additionally, you can **Reassign** the report to another approver. Note: by reassigning the report, the assignor relinquishes their approval authority for the report



Approve from preview

Viewing report details in the preview screen is limited. WSU recommends approvers to review the full details of expenses, including receipts, prior to approving a report. Using the approve function from preview should be **limited** to expense reports that contain one or two expense items, and don't have expense details that need to be reviewed.

Clicking **Approve** immediately approves the report. Once the approver has confirmed the approval and clicks the second **Approve** button, the entire report will move to the next step in the approval process.

Return from preview

Clicking **Return** immediately rejects all line items on the report. Once the approver has entered the required comment and clicked **Return**, the entire report will be sent back to the expense owner and they will be notified via email.

NOTE: The option to return a report is available via email or from the preview screen. You should first review the report in its entirety by opening the report. If you wish to return the report, you will need to return to the preview screen.

NOTE 2: Returning a report is not available within the report itself. From within the report there is the ability to return a single line item.

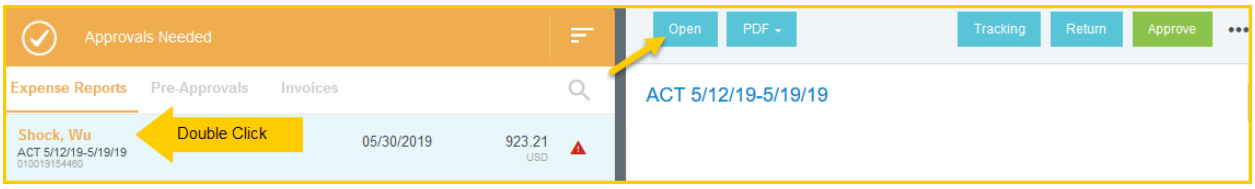
Reassign from preview

Click to search for another approver to send the expense report to for approval and insert the reason in the **Item Notes** field. Click **Reassign** to send the report. The approver that you have reassigned the form to will receive an email notification and the notes within the report will indicate the reason it was reassigned.

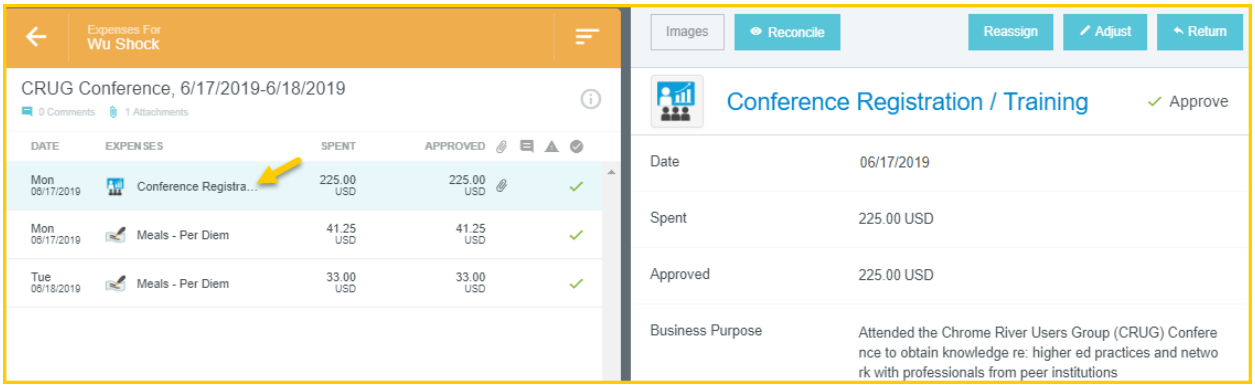
NOTE: The **Reassign** feature is only available from the preview screen. You cannot reassign via email or from within the report.

Approve from inside the report

Double click on a report in the **Approvals Needed** list to open it, or click on the report and then click **Open.**



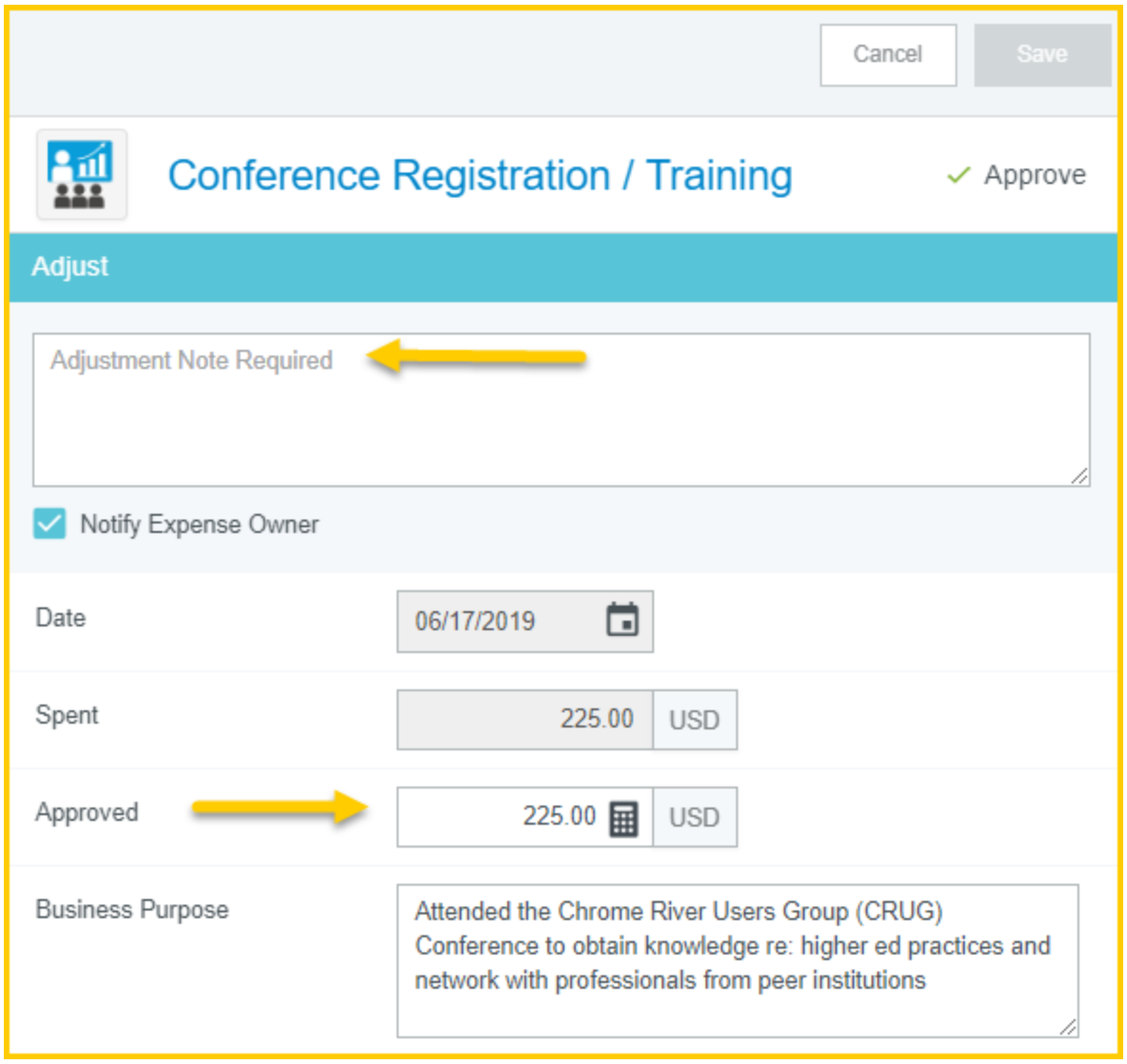
Expenses will be listed on the left side of the screen. To view details of an expense, click once on the expense and the right side of the screen will display the details, including receipts.



Adjust

During the approval process, approvers have the ability to adjust certain items on the expense report. The system requires an Adjustment note to be added. You have ability to control if the expense owner is notified of the adjustment made by selecting or deselecting the **Notify Expense Owner** check box.

- Approved amount – approvers can only adjust the approved amount down
- Business Purpose – approvers can fully edit this field
- Funding – approvers can change the funding listed on the expense line.
- Account – approvers can change the account code listed on the expense line
- Comments – approvers can add comments to the expense line. Comments can never be removed!
- Attachments – approvers can add attachments to the expense line.

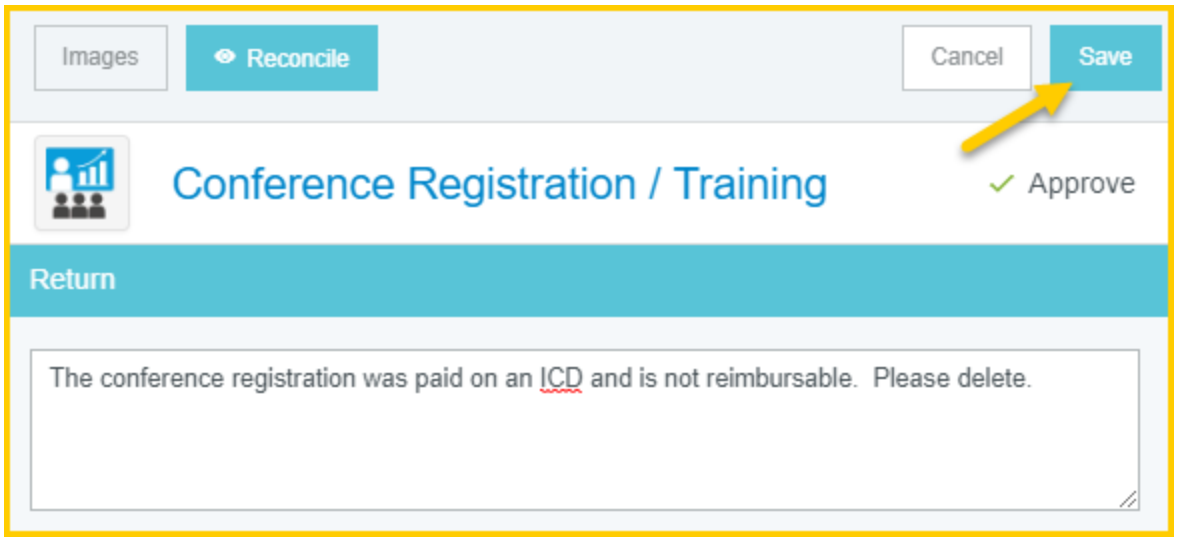


Click **Save** once you have completed your adjustment.

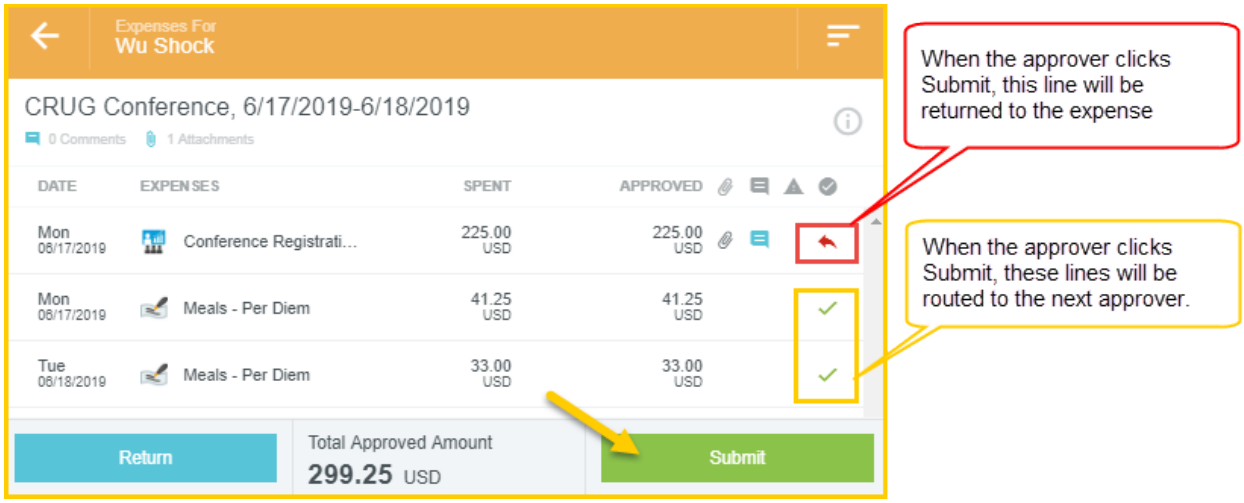
Return individual expense line

Individual expense lines can be returned to the expense owner. Once returned, only certain items can be fixed by the expense owner.

The system requires a Return note anytime you are returning an item.



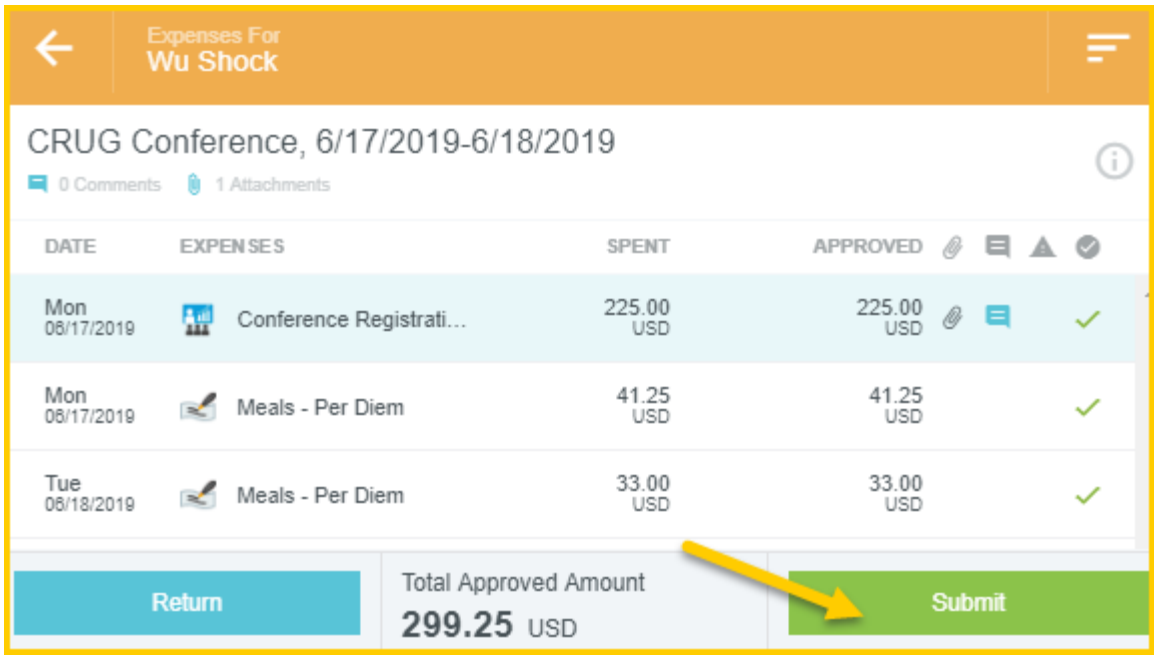
If you mark a line for return, no action will happen until you have tapped the **Return** or **Submit** button at the bottom of the expense line item list.



Note: Clicking **Return** from this screen will return **all** expense lines to the expense owner.

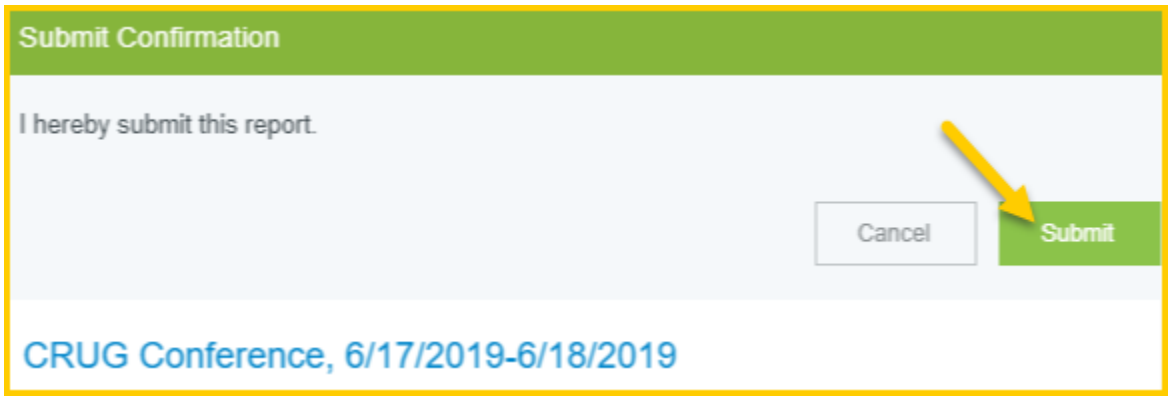
Approve

After you have reviewed the report and are ready to approve, click the **Submit** button at the bottom of the expense list.

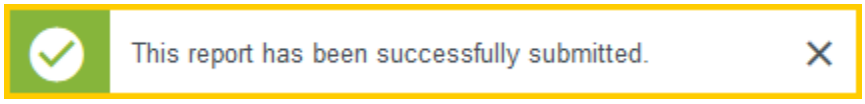


NOTE: The approval function within a report is indicated using the Submit button due to the system needing to recalculate the report in the event there were adjustments made by the approver.

Once the Submit button has been clicked, the Submit Confirmation screen will appear.



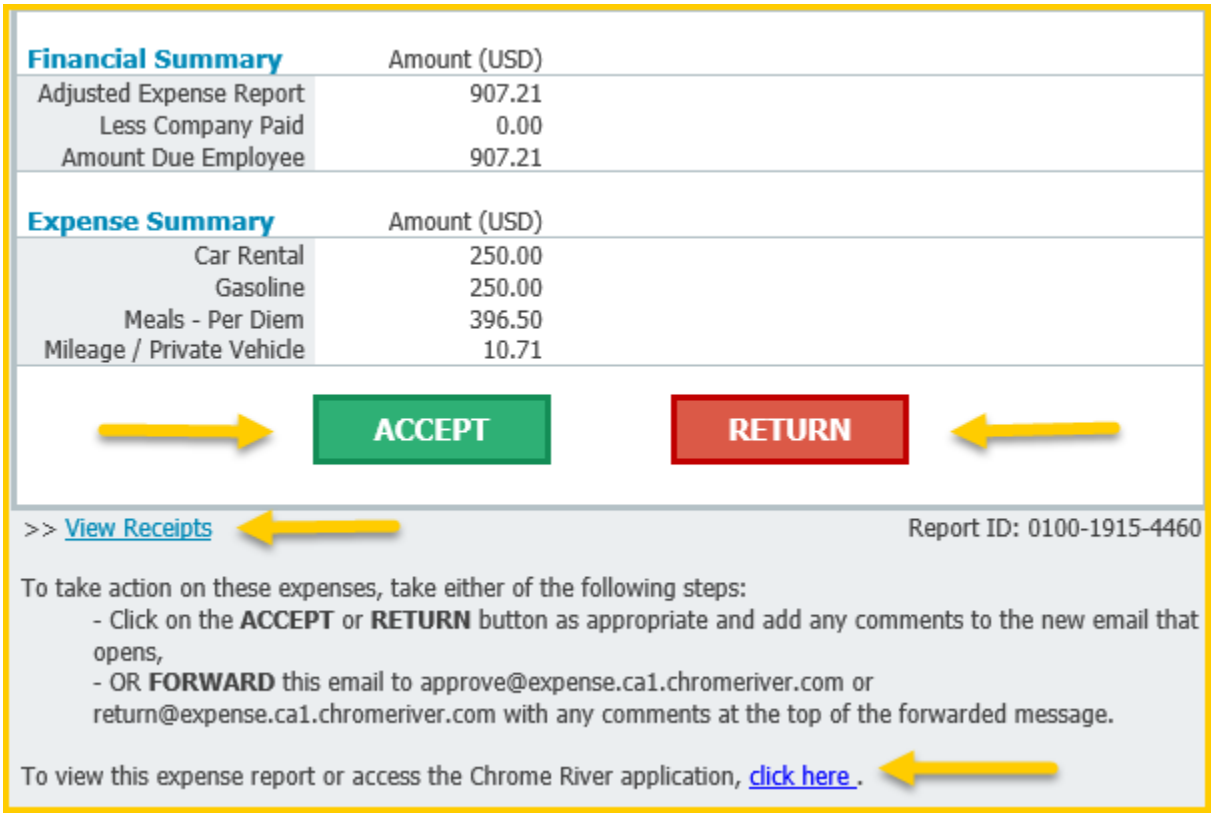
After clicking submit, a submit confirmation will be displayed.



Approve / Return via email

Chrome River will email you the expense report that requires your approval. From the email you may **Accept (Approve)** or **Return** the report.

The body of the email will contain details of the expenses on the report. At the bottom of the email, you will see the expense summary and the Accept/Return buttons. You can also click on the link provided to access the application and approve/return from there. Clicking on the View Receipts link will open a PDF of any receipts attached to the report.



Financial Summary	Amount (USD)
Adjusted Expense Report	907.21
Less Company Paid	0.00
Amount Due Employee	907.21

Expense Summary	Amount (USD)
Car Rental	250.00
Gasoline	250.00
Meals - Per Diem	396.50
Mileage / Private Vehicle	10.71

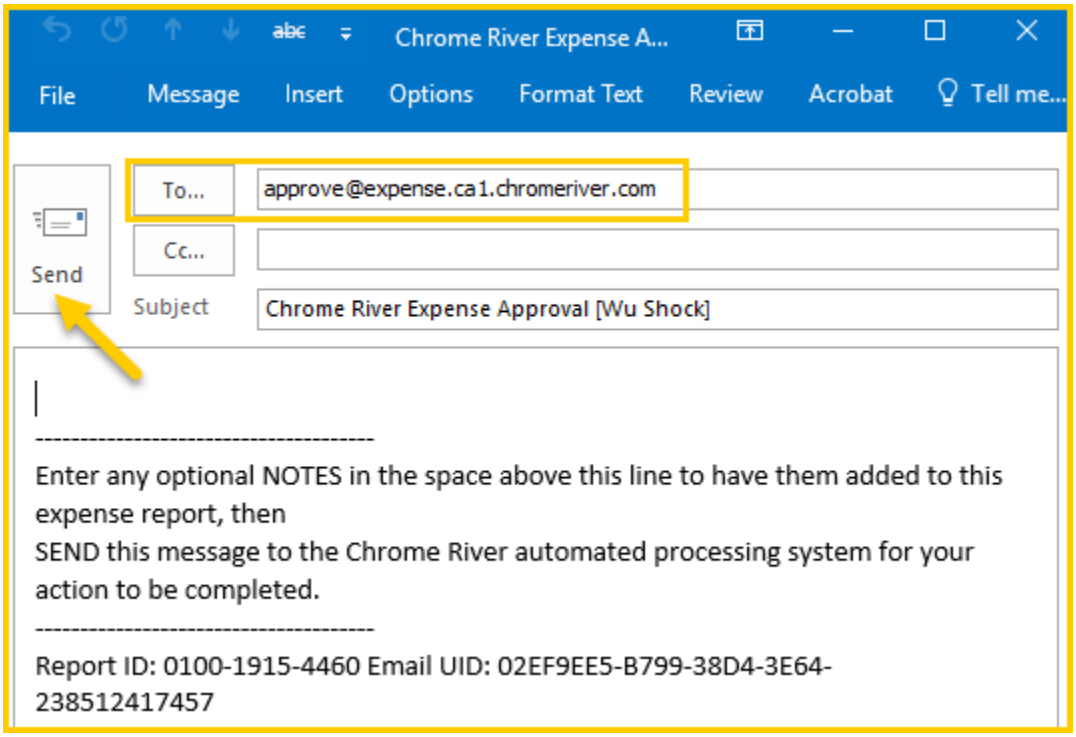
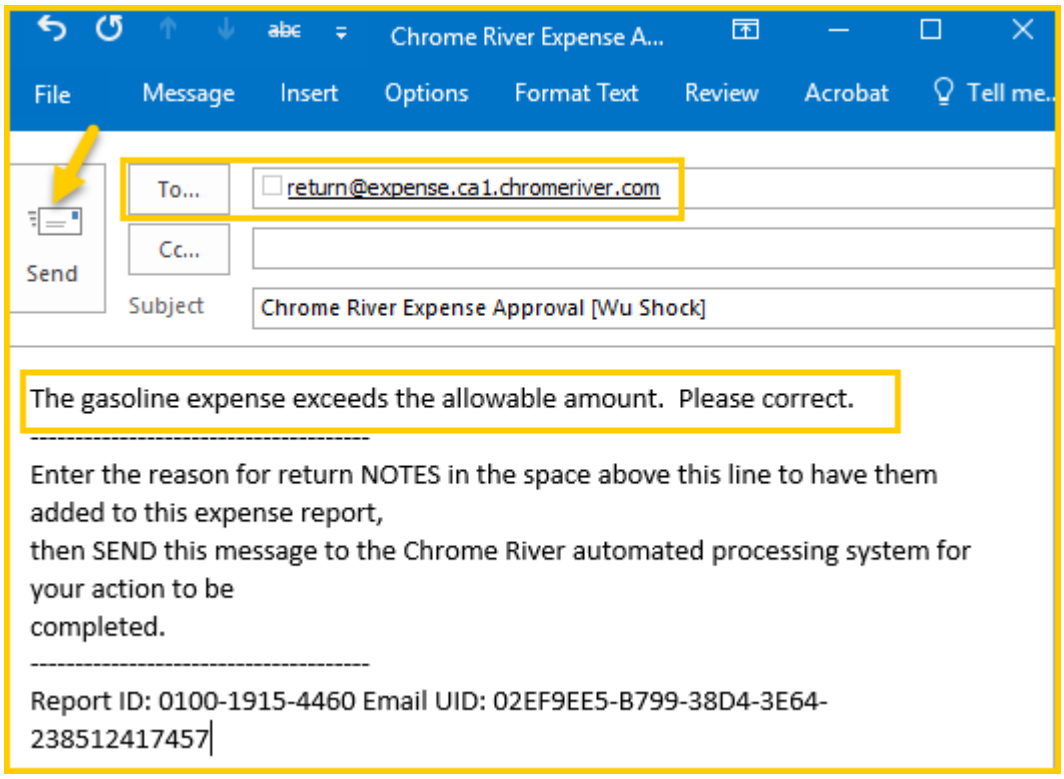
ACCEPT RETURN

>> View Receipts Report ID: 0100-1915-4460

To take action on these expenses, take either of the following steps:
- Click on the **ACCEPT** or **RETURN** button as appropriate and add any comments to the new email that opens,
- OR **FORWARD** this email to approve@expense.ca1.chromeriver.com or return@expense.ca1.chromeriver.com with any comments at the top of the forwarded message.

To view this expense report or access the Chrome River application, click here .

If you choose to approve the report, click **Accept**. You will immediately be presented with an email that will require you to send. The email indicates your approval and will be sent to the Chrome River email address for approvals. You can add a note/comment to the email but it is not necessary. You must, however, **SEND** the email in order for the approval to be confirmed.



If you choose to return the report, click **Return.** You will immediately be presented with an email that will require you to send. The email indicates your return and will be sent to the Chrome River email address for returns. You will need to add a note/comment to the email for the expense owner to know the reason for the return. You must **SEND** the email in order for the approval to be confirmed.