



Chrome River Approvals

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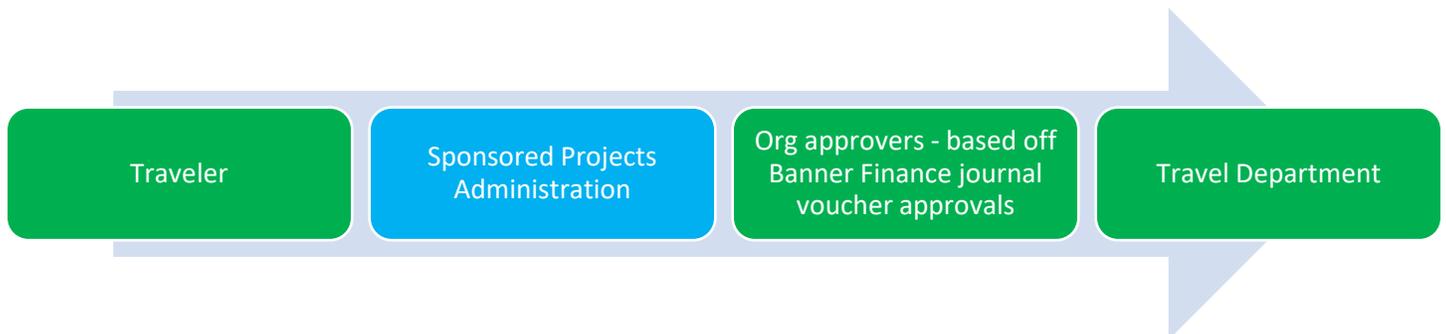
[What is Pending My Approval?](#)

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The routing for pre-approvals is (always approves, approves if applicable):



The routing for expense reports is (always approves, approves if applicable):



Sponsored Projects Administration approvers are invoked only if a grant FOAPAL.

Approving From E-Mail

When a Chrome River expense report or pre-approval is pending your approval, you will receive an e-mail from expense-noreply@chromefile.com. The e-mail will appear as below, and the subject line will indicate either **Expense Approval** (expense reports) or **Pre-Approval Request** (pre-approvals):

Pre-Approval:

Pre-Approval ID: 0100-0053-3944		
ACTION REQUIRED		
Chrome River		
Pre-Approval Request For	Test Traveler	
Report Name	10/17/18 - 10/19/18 Las Vegas	
Pre-Approval ID	0100-0053-3944	
Submit Date	10/17/2018	
Expense Dates	10/17/2018 - 10/19/2018	
Total Expenses Approved	662.25 USD	
Business Purpose		
attending a conference		
Account Summary		
		Amount (USD)
240099-100 2001-	1	662.25
172160 .00		
%		
ADCLR		
Expense Summary		
		Amount (USD)
Airfare		300.00
Hotel		300.00
Personal Mileage - Set Rates		62.25
<div style="display: flex; justify-content: space-around; margin-top: 10px;"><div style="background-color: #008000; color: white; padding: 5px 20px; border-radius: 5px;">ACCEPT</div><div style="background-color: #C00000; color: white; padding: 5px 20px; border-radius: 5px;">RETURN</div></div>		
Pre-Approval ID: 0100-0053-3944		
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@chromefile.com or return@chromefile.com with any comments at the top of the forwarded message.		

Expense Report:

Report ID: 0100-2295-0113

ACTION REQUIRED		Chrome River	
Expense Report for	Test Traveler		
Created by	BSU Travel		
Report Name	6/1/18 - 6/4/18 San Francisco		
Submit Date	02/13/2018		
Expense Dates	06/01/2018 - 06/01/2018		
Total Expenses	547.25 USD		
Prior Approvers	Test Traveler [02/13/2018 GMT]		
!! Compliance Warning !!			
Compliance Response	Overnight trip without lodging lodging paid for with conference registration		
Account Summary		Amount (USD)	
255320-800020	2006-	1	547.25
Pre-Approval Summary		Estimated (USD)	Submitted Description
	Airfare	325.00	485.00
	Hotel	725.00	0.00
	Totals	1,050.00	485.00
Expense Details			
06/01/2018	Personal Mileage - Set Rates	1	62.25 USD
	255320-800020	2006-	
	lbl_udf_PersonalMileage	Indianapolis (Airport) - 150	
	Rate	0.415	
	Cost Code	CC1	
	Reason Assigned	If EO has BSUTravel role -> Report to (Supervisor)	
06/01/2018	Airfare	1	485.00 USD
	255320-800020	2006-	
	Return Date	06/03/2018	
	lbl_udf_EgenciaPaymentMethod	No	
	Airline	AA	
	Departure Date	06/01/2018	
	lbl_udf_ClassofFare	Economy	
	Cost Code	738090	
	Reason Assigned	If EO has BSUTravel role -> Report to (Supervisor)	
!! Compliance Warning !!			
Compliance Response	Airfare: Airfare, Hotel, or Rail - Item Not Purchased Through Egencia - Please Explain. Flew with spouse - cannot book both in Egencia per University Travel Policy		
Financial Summary		Amount (USD)	
Total Expense Report	547.25		
Less Company Paid	0.00		
Amount Due Employee	547.25		
		<input type="button" value="ACCEPT"/>	<input type="button" value="RETURN"/>
>> View Receipts		Report ID: 0100-2295-0113	

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@chrome.com or return@chrome.com with any comments at the top of the forwarded message.

To view this expense report or access the Chrome River application, [click here](#).

The e-mail groups the totals by FOAPAL under **Account Summary**, and by expense type under **Expense Details**.

Note that **Compliance Warning** means that there was a potential Travel Policy violation, but the submitter entered an explanation. The e-mail includes both the warning and the **Response**.

The **Amount Due Employee** (for expense reports) is the amount the employee will be reimbursed if the document is fully approved.

Click **View Receipts** (for expense reports) to see what receipts were attached to the report, and click the **link** at the bottom of the e-mail to view the request in Chrome River.

When you are ready to take action, click either **Accept** or **Return**. Your default e-mail client should open a new e-mail to either approve@chromefile.com or return@chromefile.com (for windows PCs, you can change your default e-mail client by going to Default Applications). You have the option to enter any comments in the e-mail, and these comments will be visible in Chrome River:

APPROVAL:

 Send	From ▾	zcmickler@bsu.edu
	To...	<u>approve@chromefile.com</u>
	Cc...	
	Subject	Chrome River Expense Approval [Test Traveler]

Enter any optional NOTES in the space above this line to have them added to this expense report, then SEND this message to the Chrome River automated processing system for your action to be completed.

Report ID: 0100-2295-0113

RETURN:

 Send	From ▾	zcmickler@bsu.edu
	To...	return@chromefile.com
	Cc...	
	Subject	Chrome River Expense Approval [Test Traveler]

Enter the reason for return NOTES in the space above this line to have them added to this expense report, then SEND this message to the Chrome River automated processing system for your action to be completed.

Report ID: 0100-2295-0113

Approving in Chrome River

The **Approvals** ribbon will appear on your home screen if you have documents pending your approval:

The screenshot shows the Chrome River home screen. At the top, there is a navigation bar with the Chrome River logo and a user profile for 'Test Approver'. Below this is the 'Approvals Needed' ribbon, which is highlighted in orange. It contains three main sections: 'APPROVALS' (with a checkmark icon and '1 Expense Reports'), 'EXPENSES' (with a receipt icon), and 'PRE-APPROVAL' (with a checkmark icon). Each section has a sub-section for 'Draft', 'Returned', and 'Submitted Last 90 Days'. Red arrows point to the '1 Expense Reports' and '0 Pre-Approvals' counts. To the right of the ribbon is a sidebar with the Ball State University logo, a 'CONTACT' section, and a 'NOTICES' section. A 'REMINDER: Emailing Receipts to Your Account' notice is also visible.

In the case above, the user has one expense report to approve but no pre-approvals to approve. To see a list of documents pending your approval, click either the **Expense Reports** or **Pre-Approvals** hyperlinks in the **Approvals** ribbon (see above).

The screenshot shows the 'Approvals Needed' page in Chrome River. The 'Expense Reports' tab is selected. The page displays a list of expense reports. One report is highlighted: 'Traveler, Test' for the period '10/17/18 - 10/19/18 Las Vegas' with a value of '300.00 USD'. A red arrow points to the report. The page also includes a search icon and a menu icon.

Click the document you wish to review. Click **PDF** and then **View Receipts**. A .pdf should then be available to download which contains all receipts attached to the document.

If you have several reports pending your approval, but you know of only one which you need to approve, you can click the  icon (see above) to be able to sort the documents. You may also click the  icon to search for specific reports (search available for expense reports only at this time).

The screenshot shows the 'Approvals Needed' page in Chrome River. The 'Open' menu is open, showing options: 'Cover Page', 'Full Report', 'Full Report with Notes & Receipts', 'Full Report with Receipts', and 'View Receipts'. A red arrow points to the 'View Receipts' option. The background shows the same list of expense reports as the previous screenshot.

Next, click **Open**.

In this case, the report is displaying the  icon, which means there was a compliance warning. This means that there was a potential Travel Policy violation, but the document submitter entered an explanation.

After clicking **Open**, you will see the report header at the right and the expense items on the left. The header contains the business purpose, dates, and destination of travel.

DATE	EXPENSES	SPENT	APPROVED
Fri 06/01/2018	Personal mileage - set rates	62.25 USD	62.25 USD ✓
Fri 06/01/2018	Airfare	485.00 USD	485.00 USD ⚠️ ✓

Click on the expense items on the left to see what was entered for those items. Click the expense item which has the  icon to see the Travel Policy warning(s) and explanation(s).

Do not click **Return** if wishing to return an expense for correction; you will need to return at the report level and not the expense level, detailed below. Chrome River will only submit expenses for payment if all expenses have been approved, so the entire report, and not individual expenses, would need to be returned. The delegate can then update or remove the offending expense and re-submit.

Comments can be added at the report level or at the line level. To enter comments at the header, click the report name on the left pane, indicated above. Once you see header information on the right, enter a comment in the field indicated below:

The screenshot shows the Chrome River interface. On the left, a report header for "Expenses For Test Traveler" is displayed, including a table of expenses and a total approved amount of 547.25 USD. A yellow arrow points to the report name "6/1/18 - 6/4/18 San Francisco". On the right, the detailed view of the report is shown, including a "Comments (0)" section with a red arrow pointing to the "Add Comment" field.

DATE	EXPENSES	SPENT	APPROVED
Fri 06/01/2018	Personal mileage - set rates	62.25 USD	62.25 USD
Fri 06/01/2018	Airfare	485.00 USD	485.00 USD

Total Approved Amount: 547.25 USD

For comments at the line level, click the appropriate expense on the left pane and insert your comment for that expense on the right pane.

When you have finished reviewing:

1. Return to the header by clicking the report name, indicated by the yellow arrow, below:

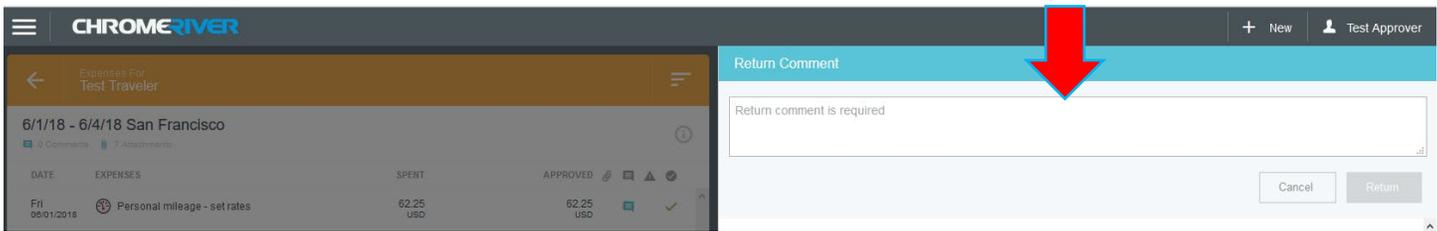
The screenshot shows the Chrome River interface. On the left, a report header for "Expenses For Test Traveler" is displayed, including a table of expenses and a total approved amount of 547.25 USD. A yellow arrow points to the report name "6/1/18 - 6/4/18 San Francisco". On the right, the detailed view of the report is shown, including a "Response" section for the "Airfare" expense. A red arrow points to the "Return" button at the bottom left, and another red arrow points to the "Submit" button at the bottom right.

DATE	EXPENSES	SPENT	APPROVED
Fri 06/01/2018	Personal mileage - set rates	62.25 USD	62.25 USD
Fri 06/01/2018	Airfare	485.00 USD	485.00 USD

Total Approved Amount: 547.25 USD

2. You can then either **Return** for correction or **Submit** your approval.

If returning, you are required to enter a comment prior to returning:

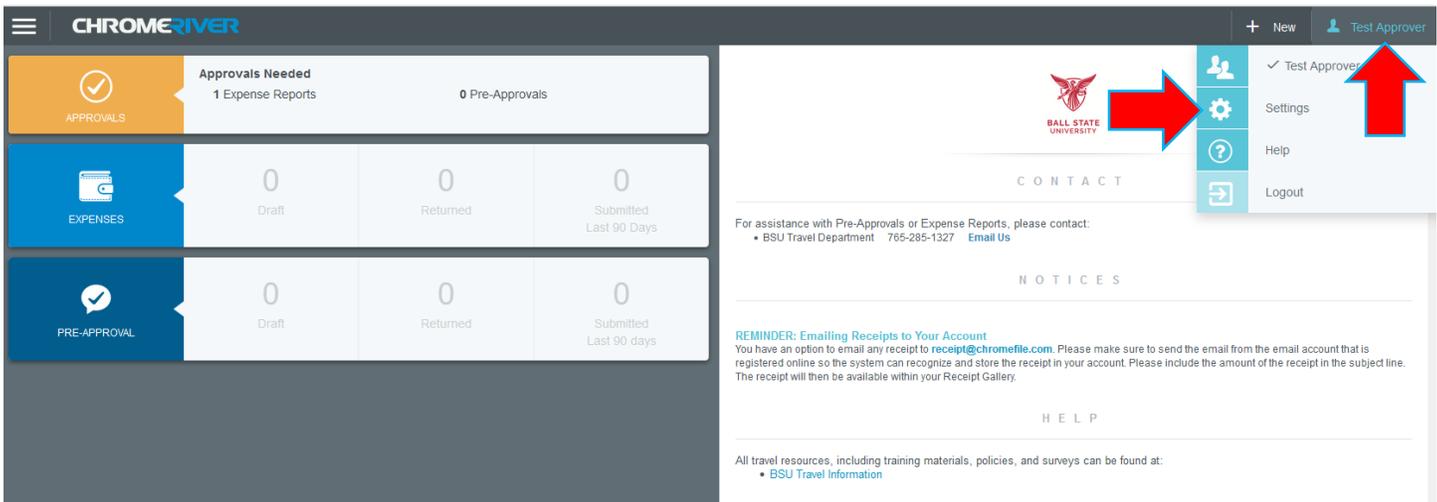


Setting Substitute Approvers (Approval Delegates/Proxies)

An approver can establish approval delegates/proxies for a specific period. Note that traveler approval is always required, so travelers will not be able to have an approval delegate approve their travel for them. Approval delegates can be used for all other workflow steps, however.

If setting an approval delegate, the approval delegate will receive approval e-mails in your absence, and only that person will be able to approve your documents for the time period you specify, below.

Click your name in the corner of the page and then click **Settings**.



Click **Delegate Settings** and then **Add Approval Delegate**:

The screenshot shows the CHROME RIVER user interface. On the left is a navigation menu with the following items: Test Approver (Test Approver), Personal Settings, Preferences Settings, Delegate Settings (highlighted in light blue with a red arrow pointing to it from the right), and Notification Settings. The main content area is titled "My Delegates" and contains the text "A 'Delegate' is someone who has full access to your account." Below this is a button with a plus sign and the text "Add New Delegates". The section below is titled "My Approval Delegate" and contains the text "An 'Approval Delegate' helps you with approvals during a specified time." At the bottom of this section is a button with a plus sign and the text "Add Approval Delegate", which has a red arrow pointing to it from the left.

Select your substitute approver, the date range that person will be approving, and click **Save**:

The screenshot shows the CHROME RIVER user interface with the "Add Approval Delegate" form. The navigation menu on the left is the same as in the previous screenshot, with "Delegate Settings" highlighted. The main content area is titled "My Approval Delegate" and contains the text "An 'Approval Delegate' helps you with approvals during a specified time." Below this text is a form with the following fields: "Select a User" with a search box labeled "Search for Name"; "Start Date" with a date picker; "End Date" with a date picker; and "Save" and "Cancel" buttons. Red arrows point to the "Select a User", "Start Date", "End Date", and "Save" buttons.

To delete the schedule, click **X**. To edit the schedule, click the  icon:

My Approval Delegate

An "Approval Delegate" helps you with approvals during a specified time.

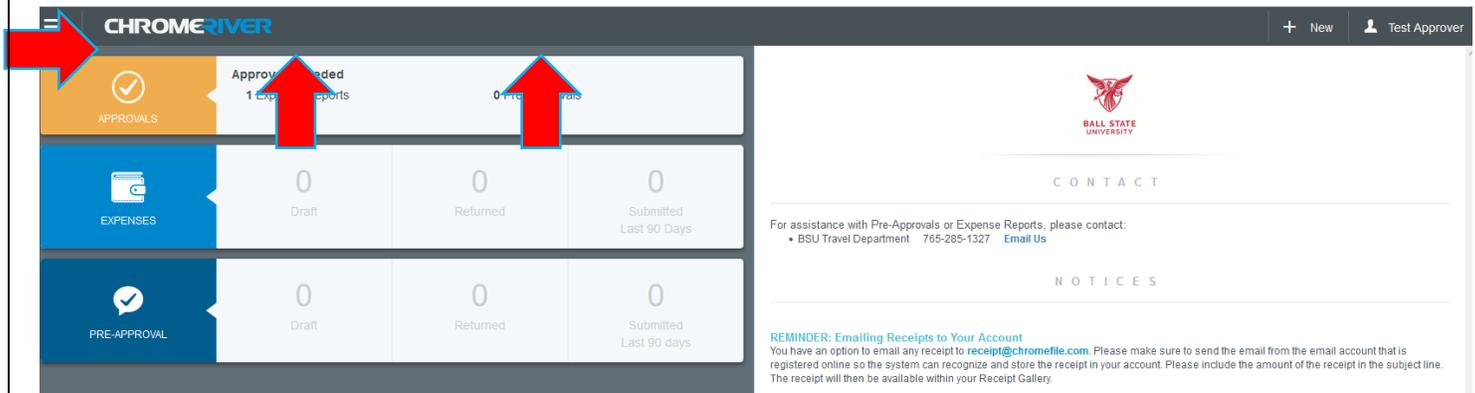
 **X** Test Delegate(02/21/2018-02/22/2018)



What is Pending My Approval?

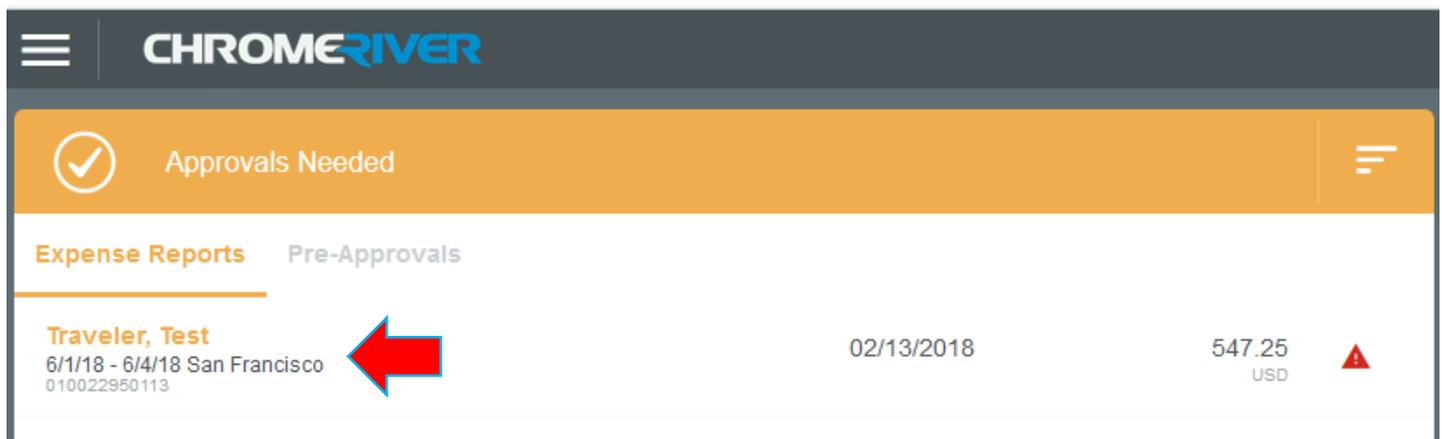
Aside from the initial approval e-mail request you receive when something is now pending your approval, you will receive approval reminder e-mails each Sunday detailing the pre-approvals or expense reports that still require action on your part.

If wishing to see what is still pending from the Chrome River module itself, sign-in to the application from my.bsu.edu. The **Approvals** ribbon will appear on your home screen if you have documents pending your approval:



The screenshot shows the Chrome River interface. The top navigation bar includes the Chrome River logo, a '+ New' button, and a user profile 'Test Approver'. The main content area is divided into three sections: APPROVALS, EXPENSES, and PRE-APPROVAL. The APPROVALS section shows 'Approved 1 Expense Reports' and '0 Pre-Approvals'. The EXPENSES section shows '0 Draft', '0 Returned', and '0 Submitted Last 90 Days'. The PRE-APPROVAL section shows '0 Draft', '0 Returned', and '0 Submitted Last 90 Days'. A red arrow points to the 'APPROVALS' ribbon, and another red arrow points to the 'Approved 1 Expense Reports' link.

In the case above, the user has one expense report to approve but no pre-approvals to approve. To see a list of documents pending your approval, click either the **Expense Reports** or **Pre-Approvals** hyperlinks in the **Approvals** ribbon (see above).



The screenshot shows the Chrome River interface with the 'Approvals Needed' ribbon selected. Below the ribbon, there are two tabs: 'Expense Reports' and 'Pre-Approvals'. The 'Expense Reports' tab is active, showing a list of pending reports. The first entry is for 'Traveler, Test' with dates '6/1/18 - 6/4/18 San Francisco' and ID '010022950113'. The report is dated '02/13/2018' and has a value of '547.25 USD'. A red arrow points to the 'Traveler, Test' entry.

What Have I Already Approved?

Click the icon in the upper left corner of the page and then choose **Inquiry**.

The screenshot shows the Chrome River interface. On the left, there is a navigation menu with categories: APPROVALS, EXPENSES, and PRE-APVAL. Under APPROVALS, there are options for Expense Report (1), Pre-Approval (0), eWallet, eReceipts, Draft, Returned, and Recently Submitted. Under EXPENSES, there are options for Draft, Returned, and Recently Submitted. Under PRE-APVAL, there are options for Draft, Returned, and Recently Submitted. The Inquiry option is highlighted with a red arrow. The main content area shows a dashboard with statistics for Pre-Approvals (Returned: 0, Submitted Last 90 Days: 0) and Expenses (Returned: 0, Submitted Last 90 Days: 0). The right side of the page features the Ball State University logo, contact information, notices, and help resources.

Choose either **My Expense Approval Items** for expense reports or **My Pre-Approval Approvals** for pre-approvals.

The screenshot shows the Chrome River Inquiry page. On the left, there is a navigation menu with options: All, My Expense Reports, My Expense Items, My Expense Calendar, My Firm Paid Items, My Expense Approval Items (highlighted with a red arrow), My Paid Expenses, Cash Advance, My Pre-Approval Approvals, and My Expense Pre-Approvals. The main content area shows a table of expense reports with columns: Owner Name, Expense Type, Matter, Client Name, Matter Name, Report ID, Report Name, and Submit Date. The table contains 5 rows of data. The bottom of the page shows a Total Count of 5.

Owner Name	Expense Type	Matter	Client Name	Matter Name	Report ID	Report Name	Submit Date
Traveler, Test	Toll	200138	2002	TEST	010022949850	3/1/18 - 3/4/18 Chicago	02/13/2018
Traveler, Test	expense_app.mosaic.... _personal_vehicle	200138	2002	TEST	010022949850	3/1/18 - 3/4/18 Chicago	02/13/2018
Traveler, Test	expense_app.mosaic.... _personal_vehicle	200138	2002	TEST	010022949850	3/1/18 - 3/4/18 Chicago	02/13/2018
Traveler, Test	Airfare	255320-8...	2006-	1	010022950113	6/1/18 - 6/4/18 San Francisco	02/13/2018
Traveler, Test	expense_app.mosaic.... _set_rates	255320-8...	2006-	1	010022950113	6/1/18 - 6/4/18 San Francisco	02/13/2018

Choose your action date in the upper right corner, and scroll to the right to see the **Action** (approved, pending, etc.) and the **Action Date**. You can also export your results for further filtering.

Export

Action Date: Feb 1, 2018 – Feb 28, 2018

Matter	Client Name	Matter Name	Report ID	Report Name	Submit Date	Action Date	Action	Approved
200138	2002	TEST	010022949850	3/1/18 - 3/4/18 Chicago	02/13/2018	02/13/2018	Approved	13.0
200138	2002	TEST	010022949850	3/1/18 - 3/4/18 Chicago	02/13/2018	02/13/2018	Approved	94.1
200138	2002	TEST	010022949850	3/1/18 - 3/4/18 Chicago	02/13/2018	02/13/2018	Approved	90.0
255320-8...	2006-	1	010022950113	6/1/18 - 6/4/18 San Francisco	02/13/2018		Pending	485.0
255320-8...	2006-	1	010022950113	6/1/18 - 6/4/18 San Francisco	02/13/2018		Pending	62.2