Chrome River Approvals

[Approving From E-Mail]

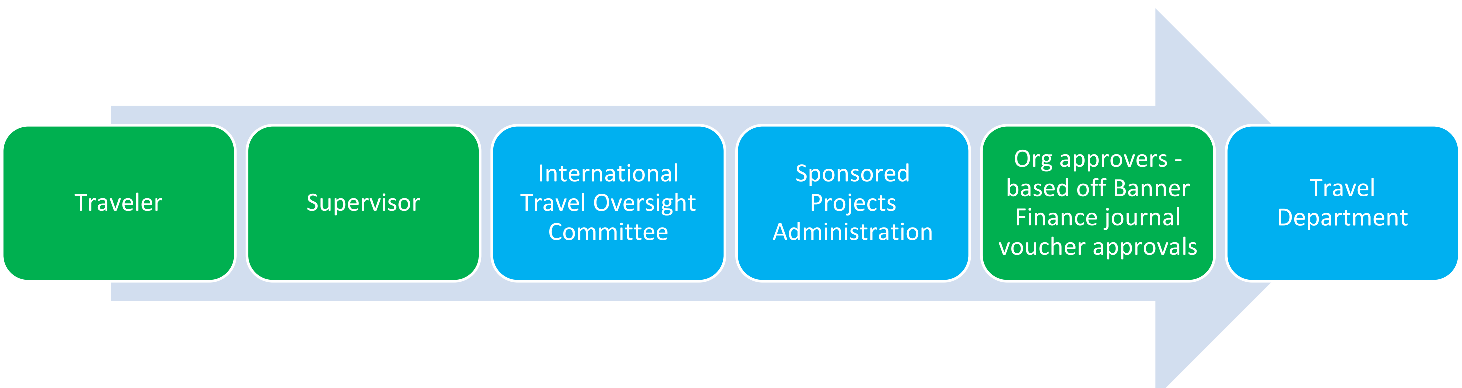
[Approving in Chrome River]

[Setting Substitute Approvers (Approval Delegates/Proxies)]

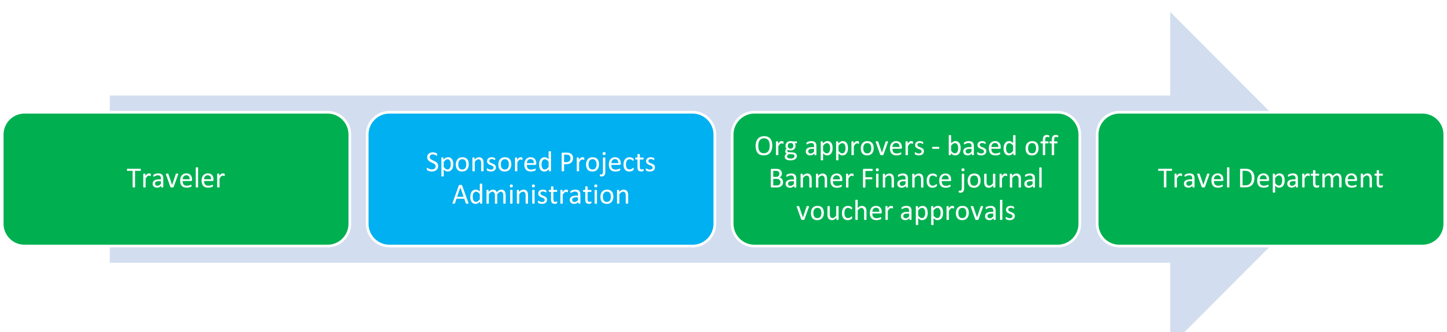
[What is Pending My Approval?]

[What Have I Already Approved?]

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)
240099-172160	100.00%	2001-ADCLRV	1	662.25

Expense Summary	Amount (USD)
Airfare	300.00
Hotel	300.00
Personal Mileage - Set Rates	62.25

ACCEPT RETURN

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	Overnight trip without lodging
Response	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 255320-800020	1 2006-	62.25 USD
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 255320-800020	1 2006-	485.00 USD
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 !!

Airfare	Airfare, Hotel, or Rail - Item Not Purchased Through Egencia - Please Explain.
Response	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

ACCEPT **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@chromefile.com or return@chromefile.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.

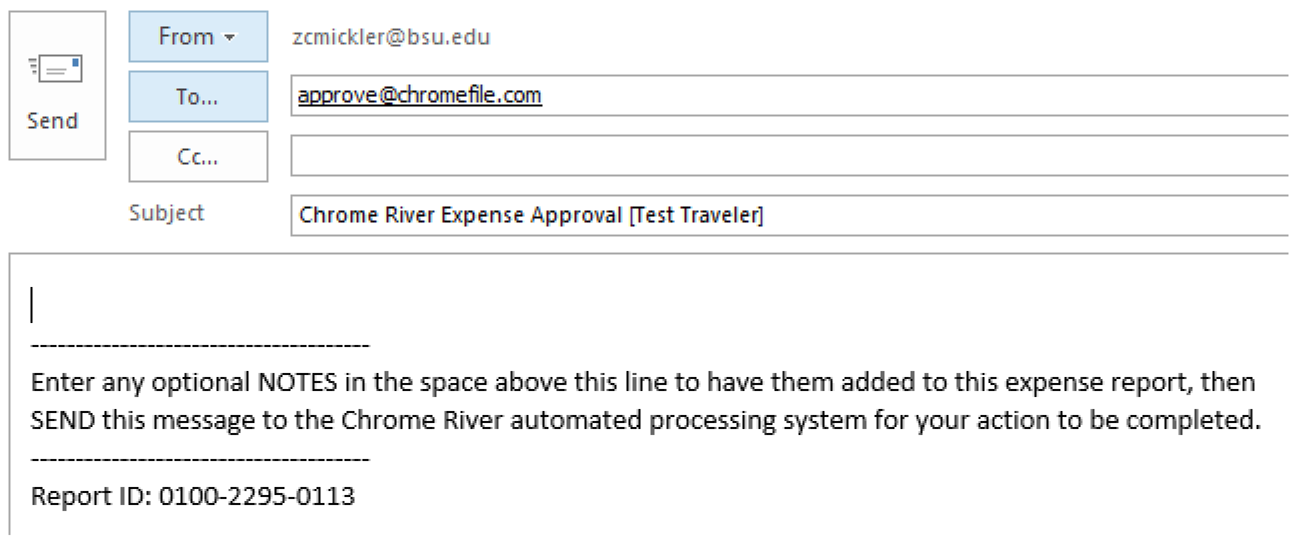
Note that Compliance Warning means that there was a potential Travel Policy violation, but the submitter entered an explanation. The e-mail includes both the warning and the Response.

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

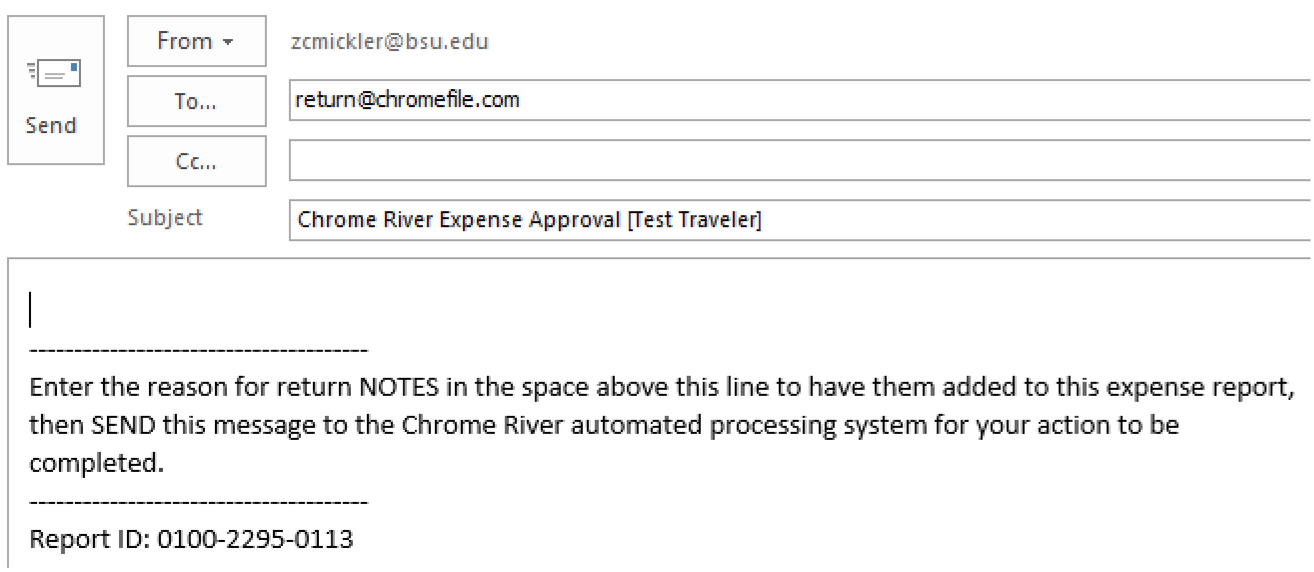
Click View Receipts (for expense reports) to see what receipts were attached to the report, and click the link at the bottom of the e-mail to view the request in Chrome River.

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:

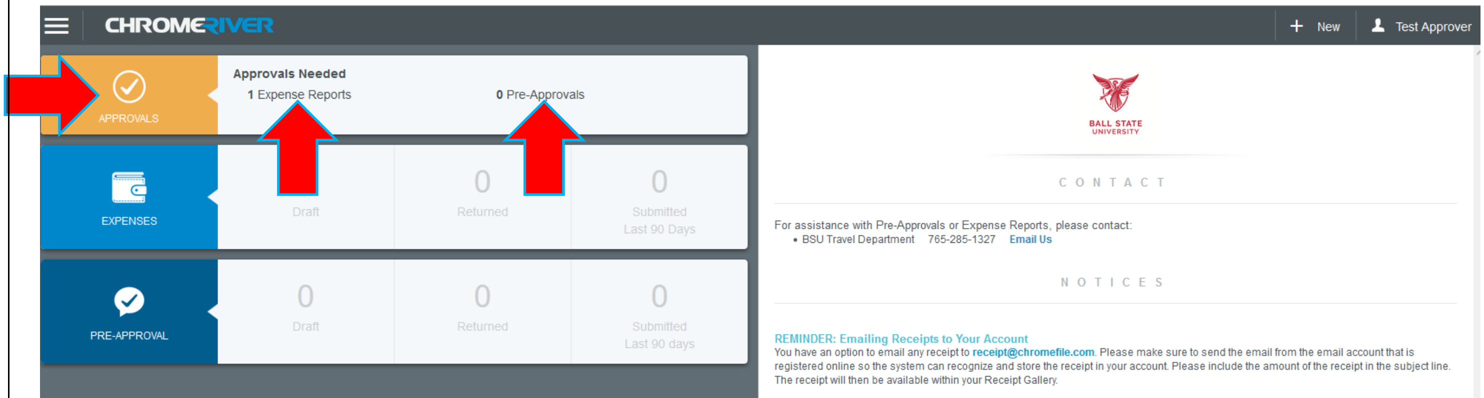


RETURN:

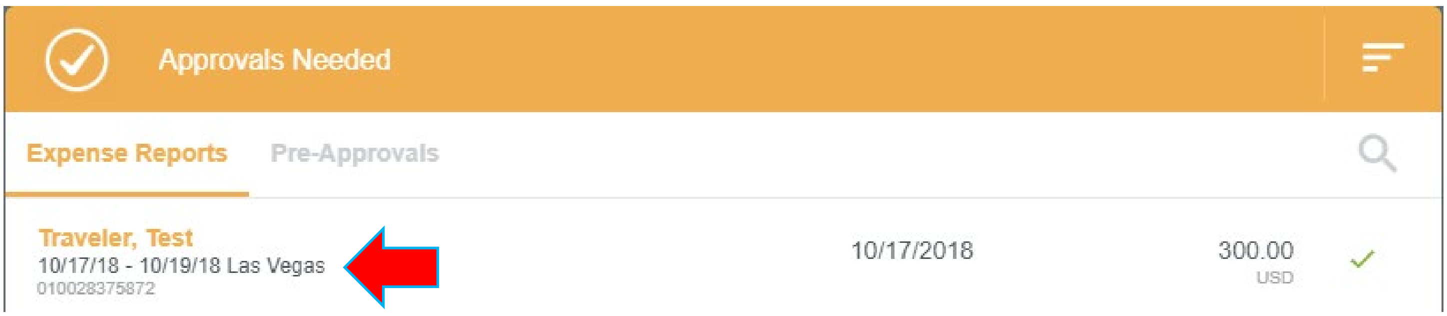


Approving in Chrome River

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

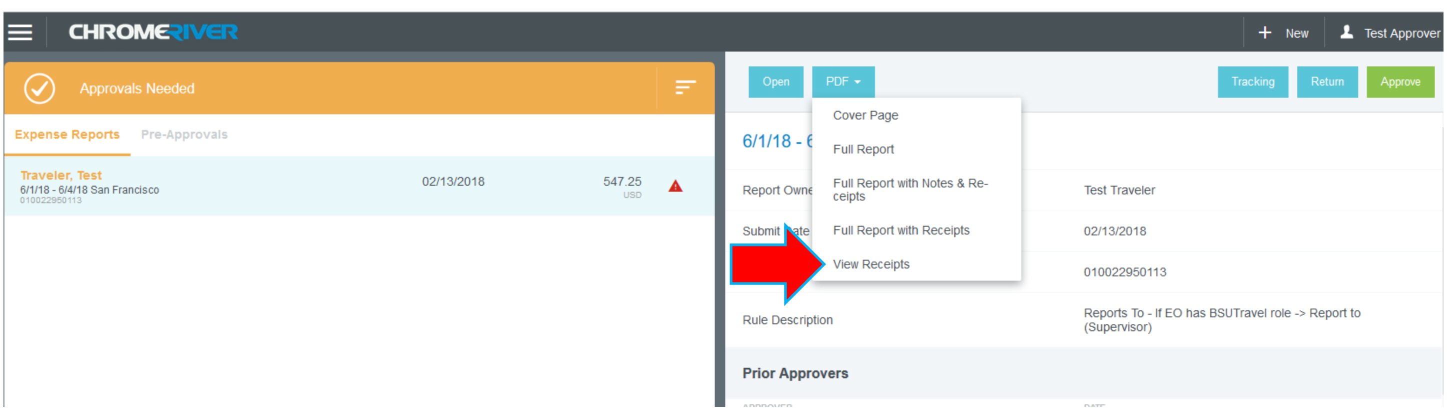


In the case above, the user has one expense report to approve but no pre-approvals to approve. To see a list of documents pending your approval, click either the Expense Reports or Pre-Approvals hyperlinks in the Approvals ribbon (see above).

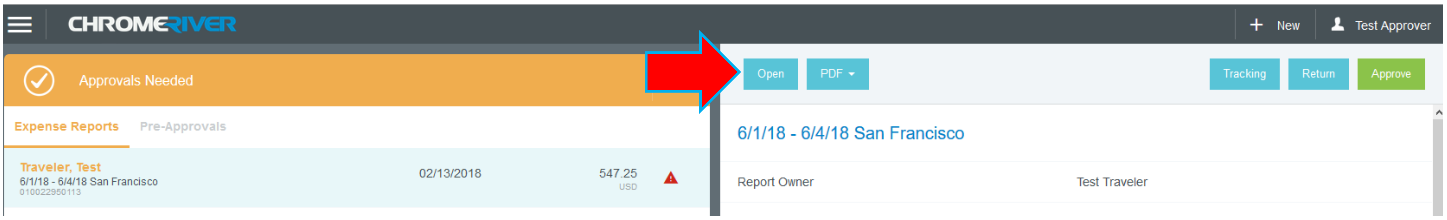


Click the document you wish to review. Click PDF and then View Receipts. A .pdf should then be available to download which contains all receipts attached to the document.

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).

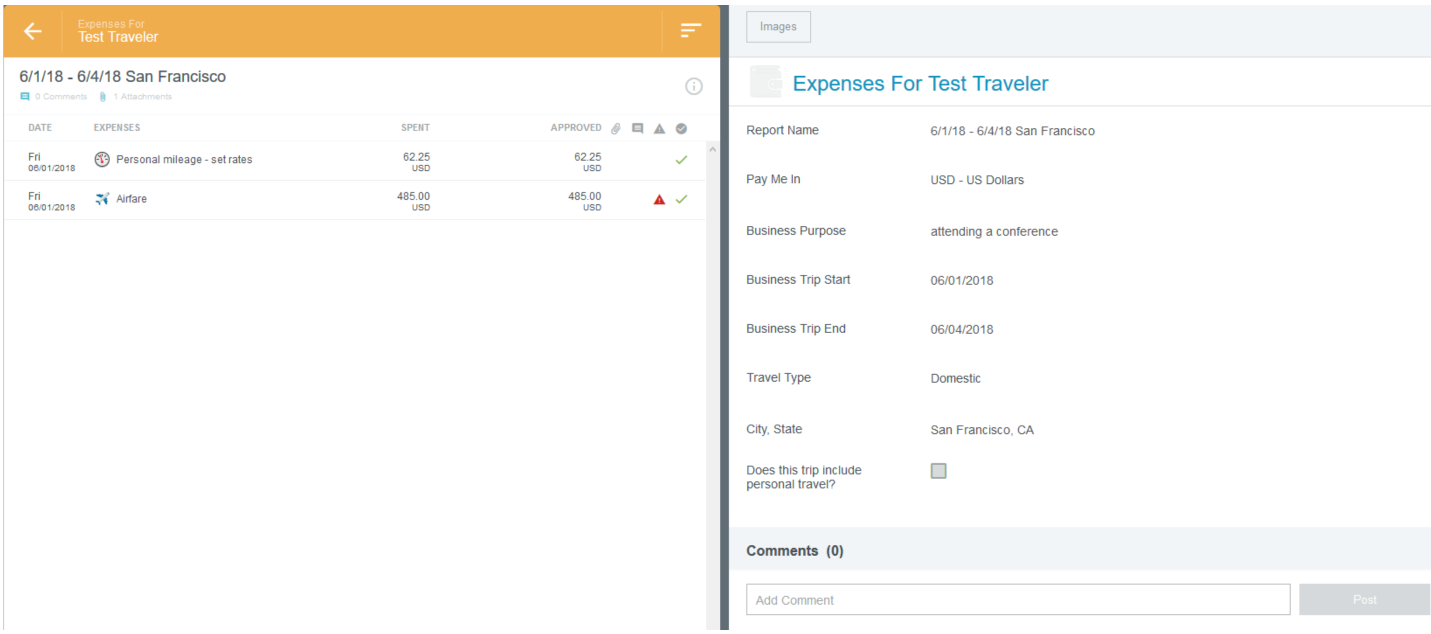


Next, click Open.

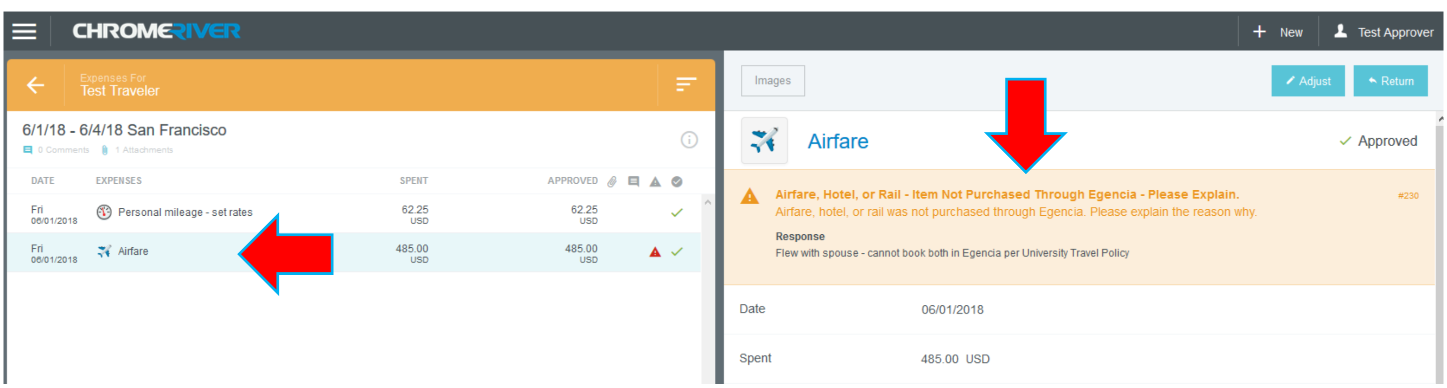


In this case, the report is displaying the icon, which means there was a compliance warning. This means that there was a potential Travel Policy violation, but the document submitter entered an explanation.

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.

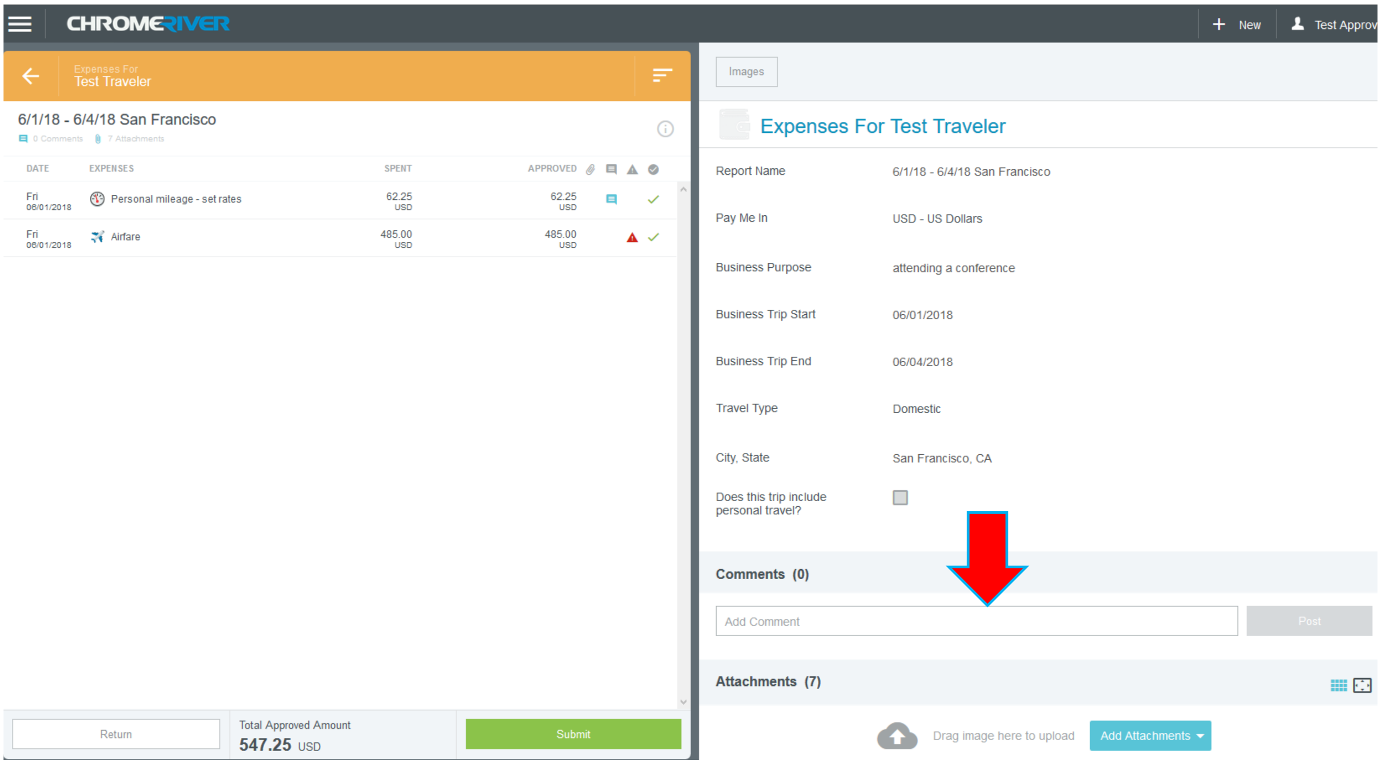


Click on the expense items on the left to see what was entered for those items. Click the expense item which has the icon to see the Travel Policy warning(s) and explanation(s).



<u>Do not click Return if wishing to return an expense for correction</u>; 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.

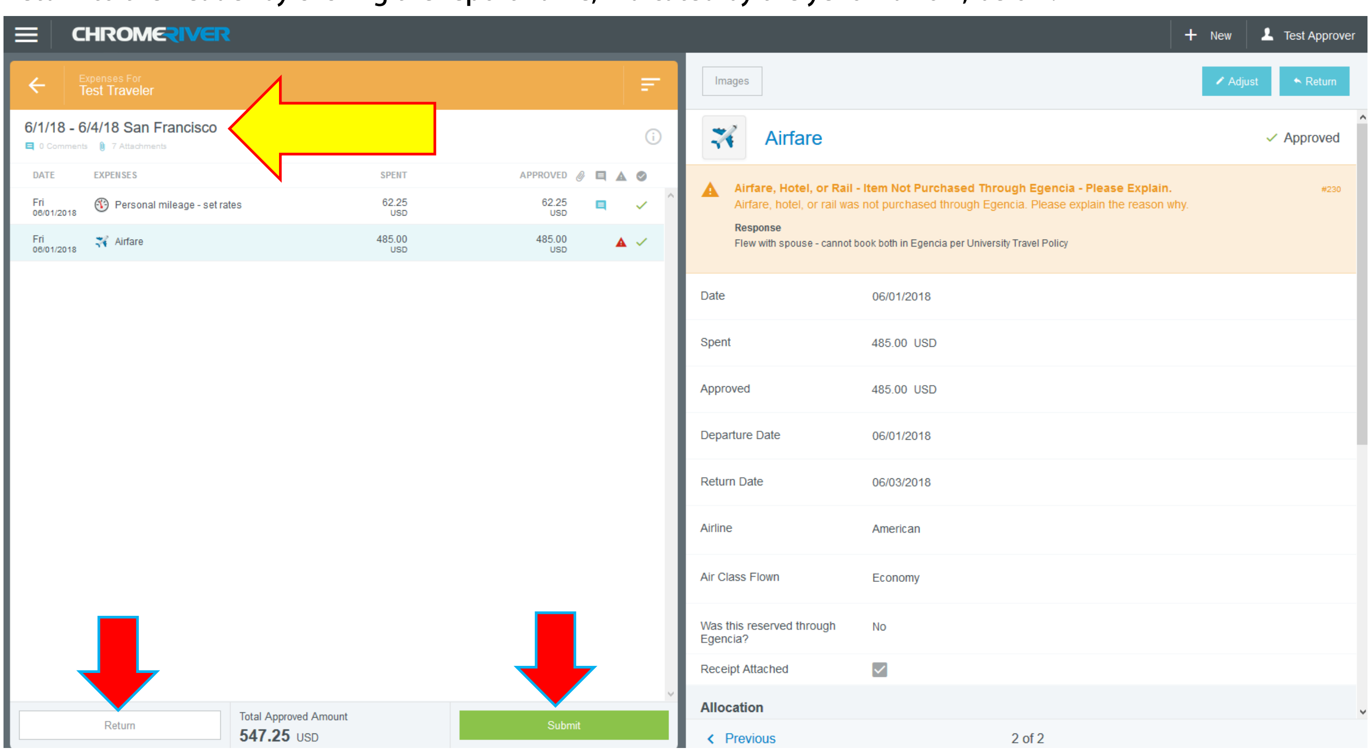
Comments can be added at the report level or at the line level. To enter comments at the header, click the report name on the left pane, indicated above. Once you see header information on the right, enter a comment in the field indicated below:



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.

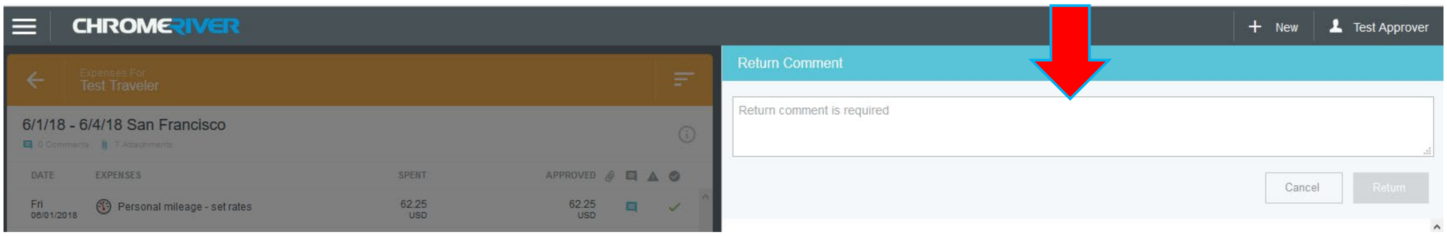
When you have finished reviewing:

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



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

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

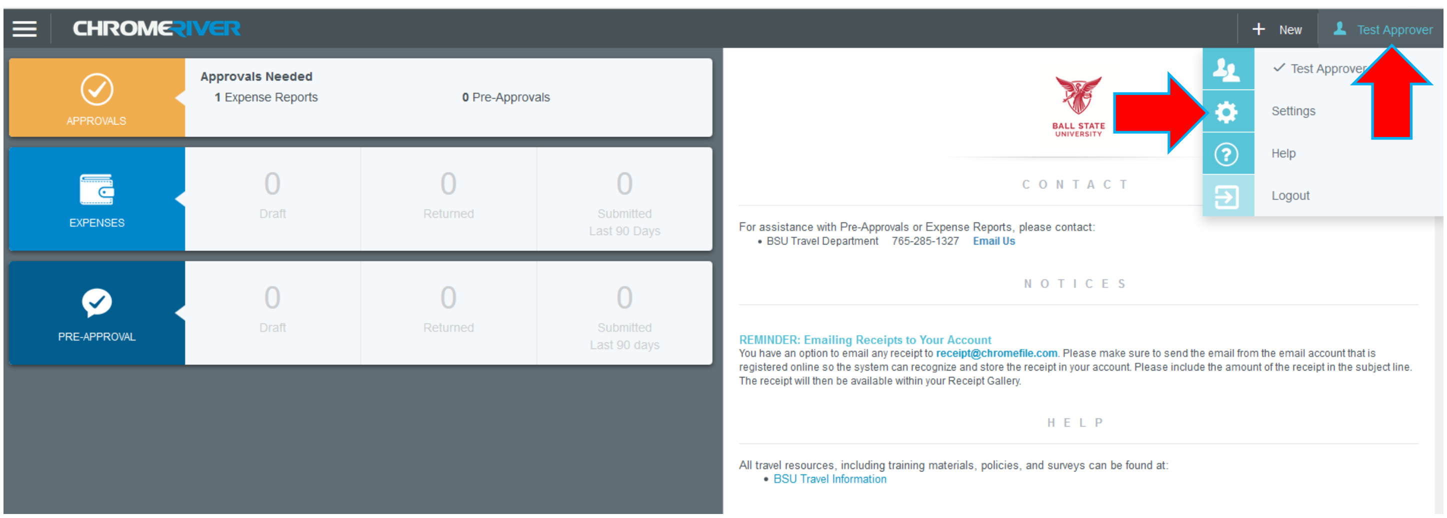


Setting Substitute Approvers (Approval Delegates/Proxies)

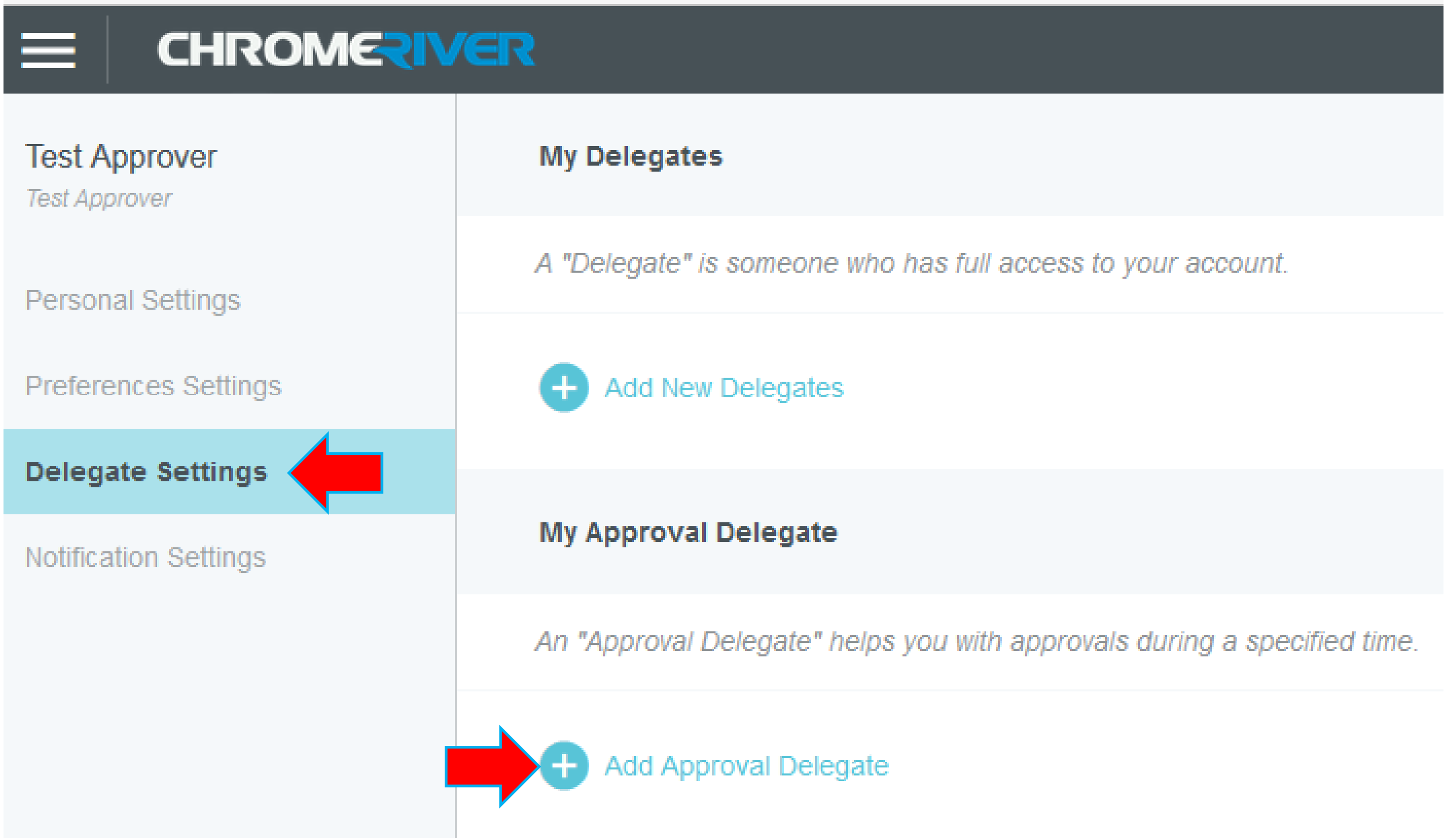
An approver can establish approval delegates/proxies for a specific period. Note that traveler approval is always required, so travelers will not be able to have an approval delegate approve their travel for them. Approval delegates can be used for all other workflow steps, however.

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.

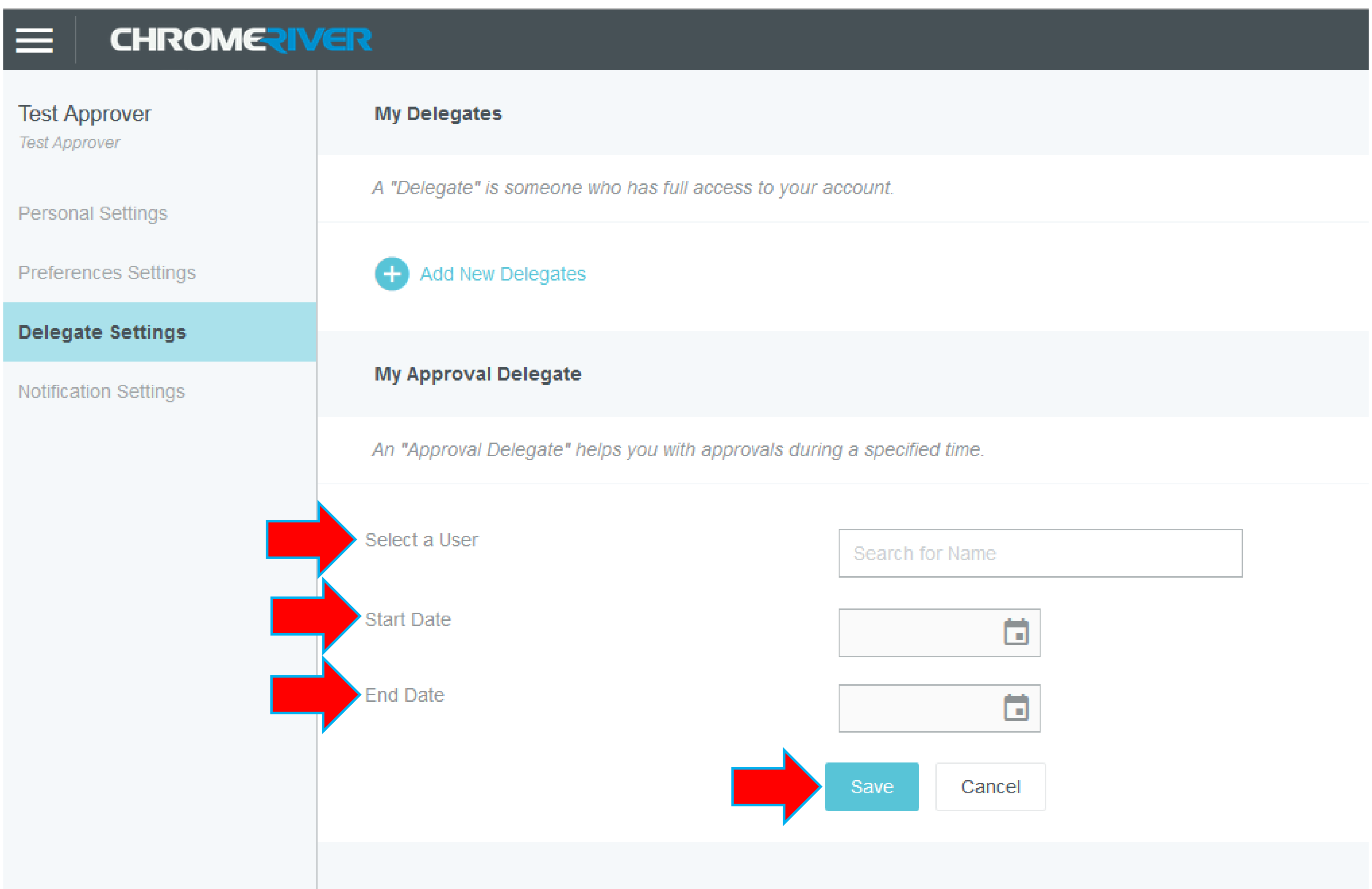
Click your name in the corner of the page and then click Settings.



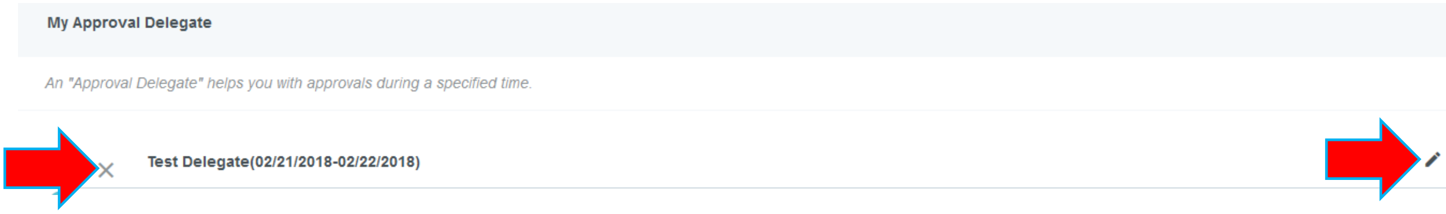
Click Delegate Settings and then Add Approval Delegate:



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



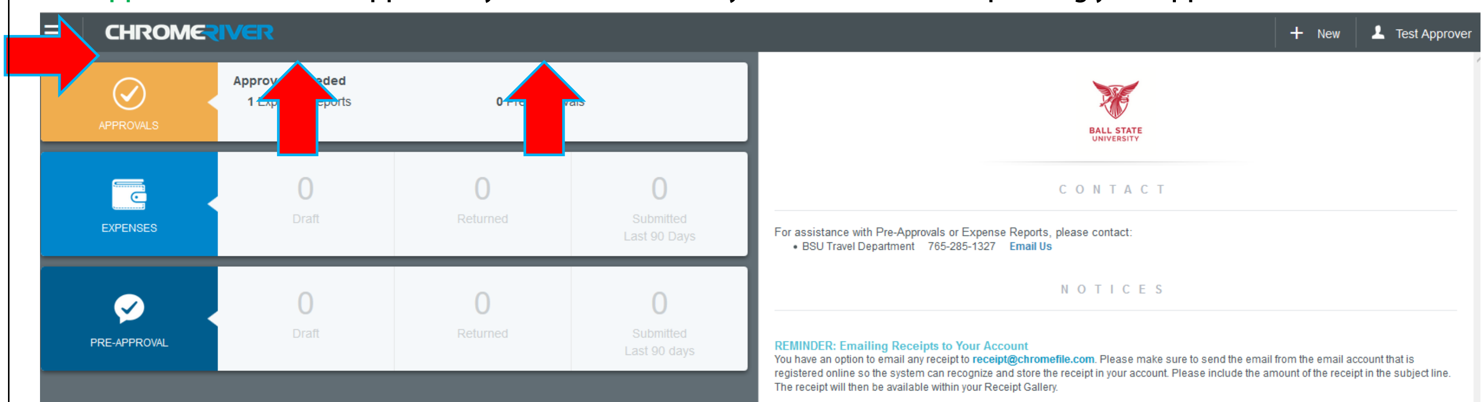
To delete the schedule, click X. To edit the schedule, click the icon:



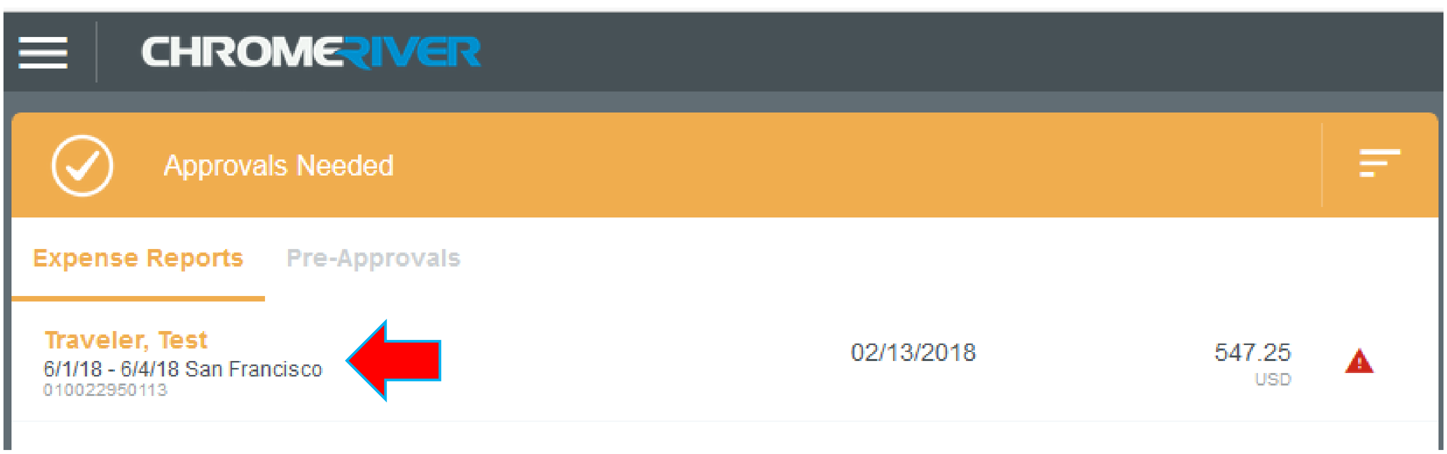
What is Pending My Approval?

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:

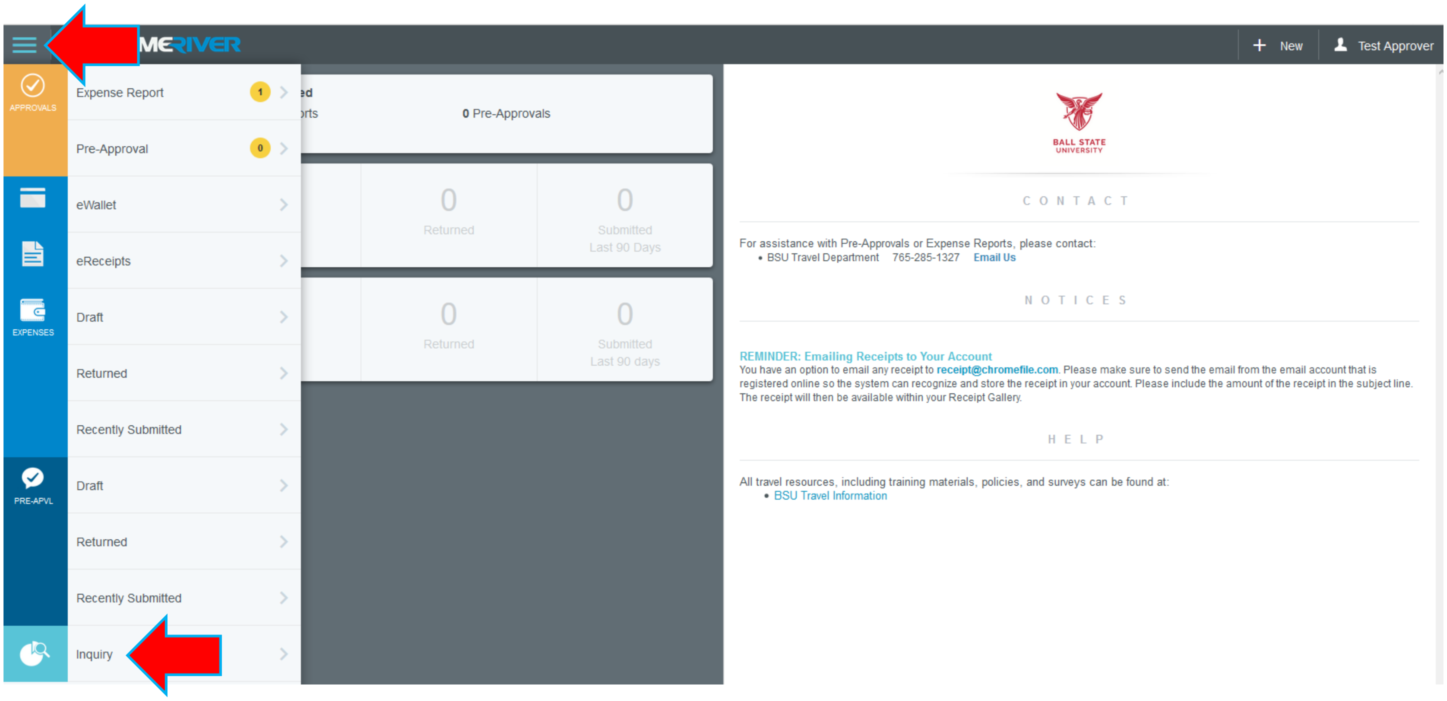


In the case above, the user has one expense report to approve but no pre-approvals to approve. To see a list of documents pending your approval, click either the Expense Reports or Pre-Approvals hyperlinks in the Approvals ribbon (see above).

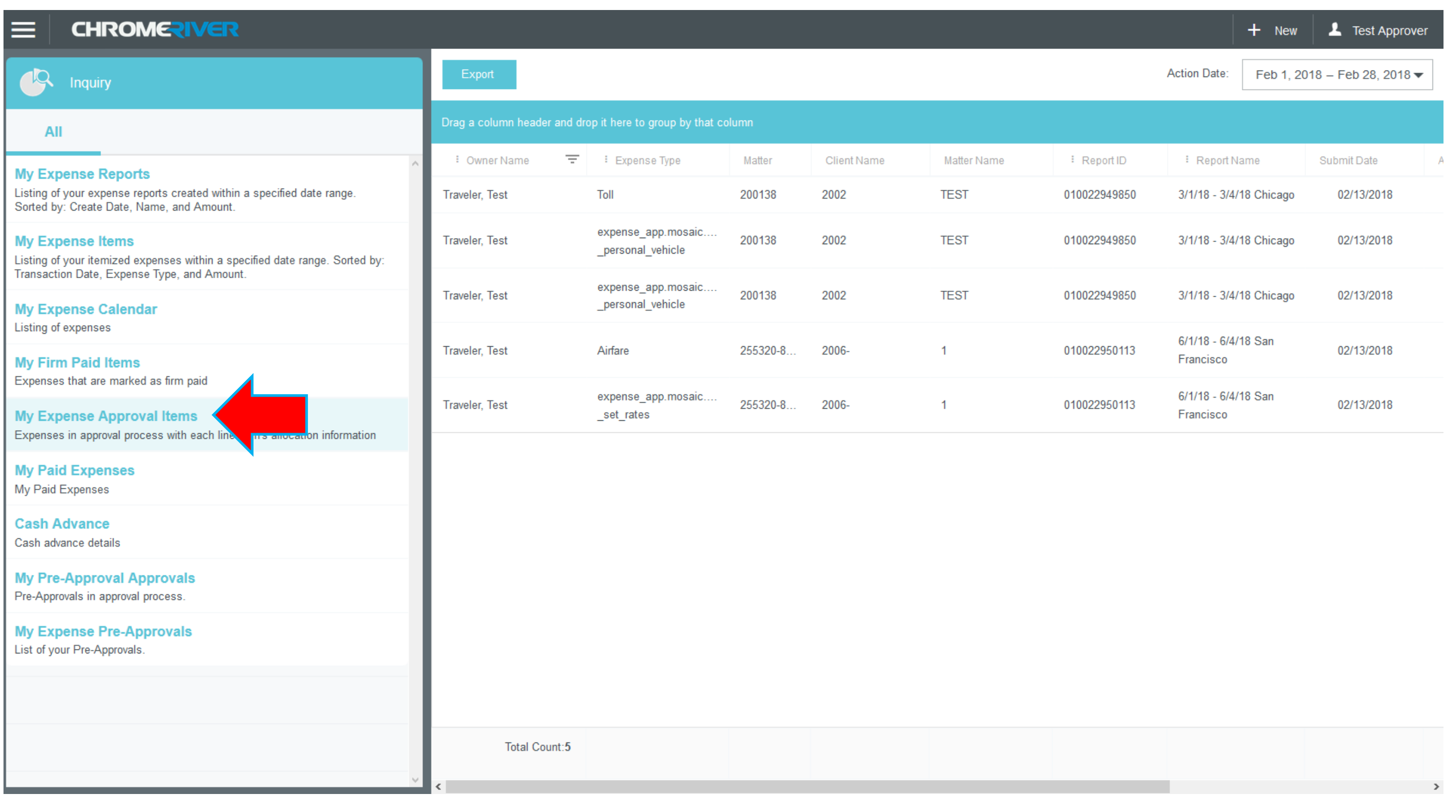


What Have I Already Approved?

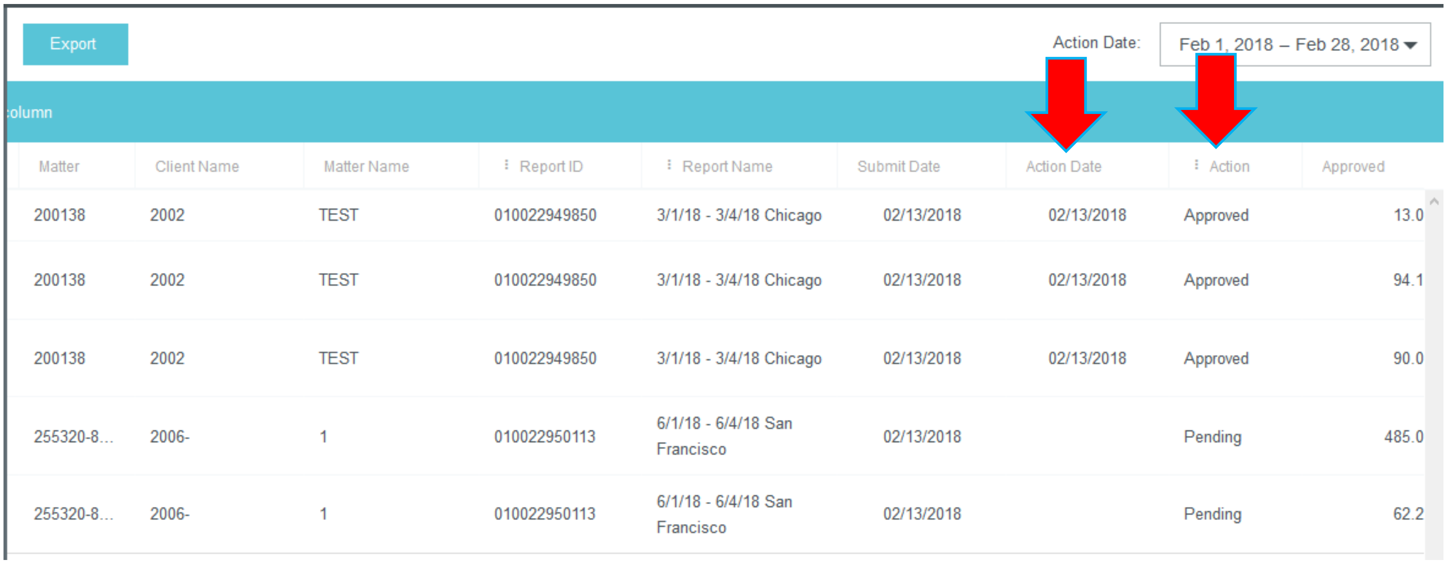
Click the icon in the upper left corner of the page and then choose Inquiry.



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



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

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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