

How to Approve/Return a Report

Approve via Email - Chrome River will email you pre-approvals and expense reports that require your approval (see example below):

ACTION REQUIRED				Chrome River
Pre-Approval Request For	Mary Hughes			
Report Name	Ellucian			
Pre-Approval ID	0100-0041-8096			
Submit Date	03/28/2018			
Expense Dates	03/30/2018 - 04/07/2018			
Total Expenses Approved	3,000.00 USD			
Prior Approver	Mary Hughes			
Business Purpose				
conference				
Account Summary				Amount (USD)
430006	100%	Disbursements	430006	3,000.00
		110005 University	60 Institutional Support	
		Operating Unrestricted		
Expense Summary		Amount (USD)		
	Airfare			250.00
	Airfare			500.00
	Hotel - Lodging			2,250.00
		ACCEPT		RETURN

Pre-Approval ID: 0100-0041-8096

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.

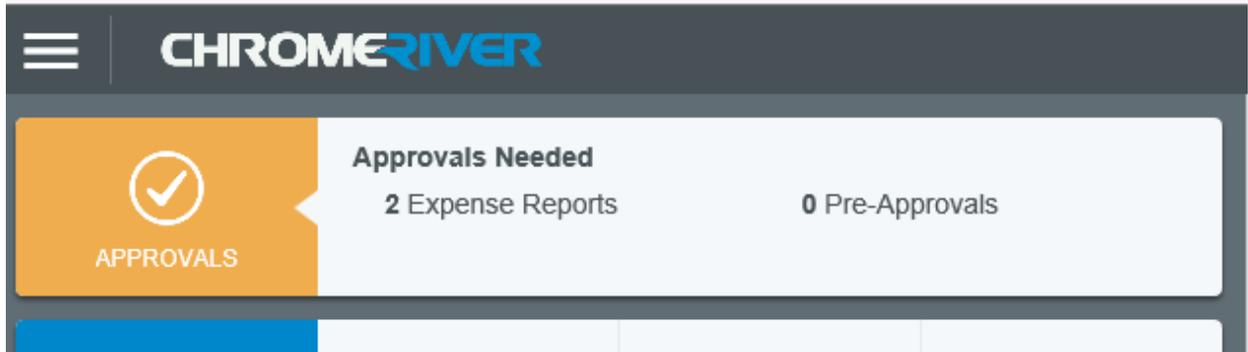
- Click **ACCEPT** or forward the email to approve@chromefile.com. This will approve all line items on the report.
- Click on **RETURN** or forward the email to return@chromefile.com. This will reject all line items on the report.

To add questions or comments, type them in the body of the email, above the forwarded text, then click **SEND**.

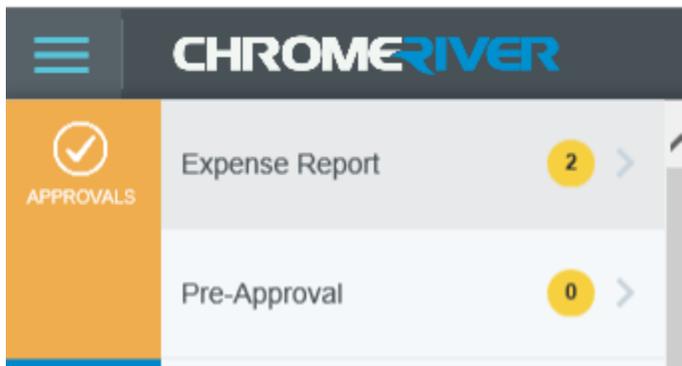
Note: If you would like to notify anyone else in addition to the traveler and Proxy, forward the email to approve or return and cc the person to be notified.

Approve/Return in Chrome River

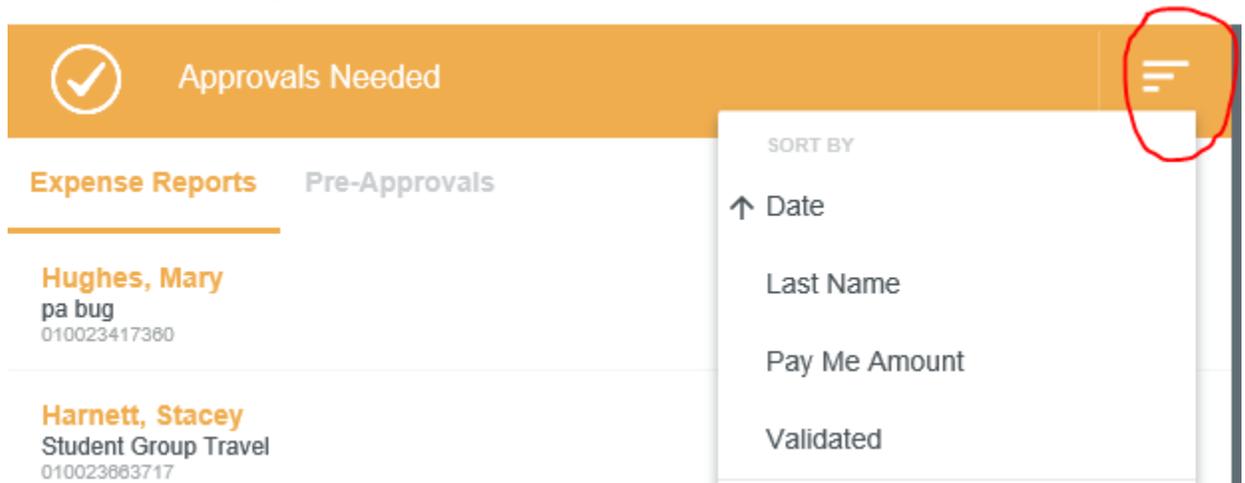
- 1) You can also see your approvals by logging into Chrome River. Since you are a part of the approval process, you will see a yellow notification bar at the top of the dashboard.



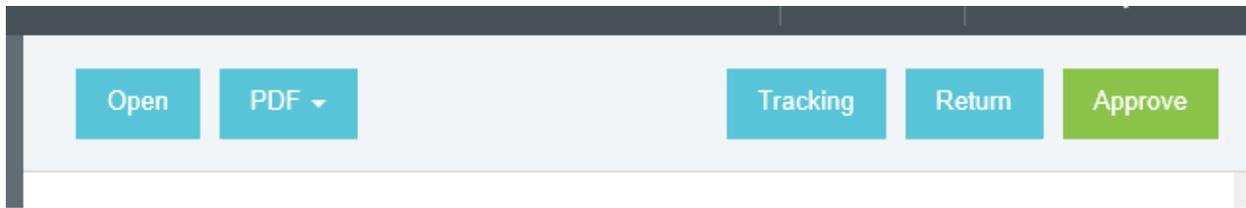
You can also access your approvals by clicking on the **MENU** button in the upper left corner. The yellow circle shows the number of approvals waiting for you.



- 2) Click on Pre-Approvals or Expense Reports to access your reports. You can click on the **SORT** button on the right-hand corner to Sort your list.



- 3) Click on the specific report you would like to view. The preview will appear on the right. From the preview, you have the ability to do the following:



- **APPROVE:** Clicking on approve will immediately approve all line items on the report. Once the approver has confirmed the approval and clicked on the second approve button, the entire report will move the next step of the approval process. The expense owner will also receive email notification that the report has been approved.
- **RETURN:** Clicking on return will reject all lines items on the report. Once the approver has entered the required note and clicked on return, the report will be sent back to the expense owner.
- **OPEN:** Open the report to approve or return individual line items. Unless they have compliance warnings, line items are marked as approved by default. You will see a green check mark on the line item in the list, as well as an “Approve” check mark in the line item preview. If the line item has been returned or reassigned, you will see it noted in the same places.
- **TRACKING:** See the report’s complete path through the approval routing process.
- **PDF:** Click to view various versions of the report’s PDF report.

4) If you open an **Expense Report**, you have the ability to adjust the following:

- Approved Amount
- Business Purpose
- Allocation

You will be required to add an adjustment note, and the check box next to *Notify Expense Owner* will automatically be checked.

Note: Adjustments cannot be made on Pre-Approvals by the Approver; they can only be made on Expense Reports.

Images Adjust Return

 **Personal Vehicle Mileage** ✓ Approve

Date	03/07/2018
Spent	76.12 USD
Approved	76.12 USD

 **Personal Vehicle Mileage** ✓ Approve

Adjust

Adjustment Note Required

Notify Expense Owner

Date	03/07/2018	
Spent	76.12	USD
Approved	76.12	 USD

- 5) You may click on individual line items to mark them as adjusted or returned, but **none of your actions will take effect** until you have clicked on the **RETURN** or **SUBMIT** button at the bottom of the line item list.

NOTE: If you return a report, it will be sent back to the traveler's Chrome River dashboard and both the traveler and Proxy will be notified. Submitting a report will send it to AP for final review and disbursement.