

CHROMER RIVER APPROVER MANUAL

CONTENTS

Introduction.....	1
Roles and Responsibilities	1
Approvals in Chrome River	2
Approval via Email.....	2
Approval in Chrome River Application	5
Adjust an Expense.....	6
Return an Expense	7
Approve a Report.....	7
Add an Approval Delegate.....	8

INTRODUCTION

Chrome River is the university's online application for travel expenses reimbursements. Chrome River provides a fully electronic solution for expense reports allowing university employees to manage Pre-Approvals, track Expense Reports, and submit reimbursements in the most cost-effective, timely and efficient manner possible.

Reports are submitted electronically and automatically routed to the appropriate approvers (by email) and then to the Travel Office for final review. Users can track where the report is in the process at that time. The system streamlines the work of approvers by flagging many potential compliance issues and delivering reports, along with receipts, business purposes, and any explanations provided by the submitter via email.

ROLES AND RESPONSIBILITIES

Approvers are responsible for ensuring that the university's resources are being spent for a business purpose, and all spending is appropriate, necessary, and reasonable.

Approving an expense implies the following:

- There is an appropriate business purpose for the expense
- It conforms with university policy
- The expense is reasonable
- The expense has appropriate documentation (receipts, justifications)

Approval routings are automatically assigned in the system based on university policies. Users in Chrome River have defined roles and responsibilities. The roles are assigned in the system and operate how information is shared and routed for approval and reimbursement.

Approver Roles in Chrome River:

CHROMER RIVER APPROVER MANUAL

- **Supervisor Approver Role:** Supervisor approvers ensure that travel requests support the William & Mary mission. Pre-Approvals are first routed to the supervisor once submitted in the system. A supervisor may approve the Expense Report only if the budget approver is the traveler. The supervisor role is the expense owner's timesheet approver listed in HR Banner.
- **Primary or Budget Approver Role:** Budget approvers ensure that funds are available for the travel request. They examine expenses to make sure they are in compliance with William & Mary policy and ensures required documentation is attached. Budget approvers will approve the Pre-Approval and the Expense report when in the routing process. They are designated on the list of authorized allocation (Index) approvers and are identified by the Business Officers for the role.
- **International Approver Role:** The International approver is required for all travel conducted to a foreign country destination and is routed on the Pre-Approval request. The international approver approves lodging exceptions when a non-conference hotel room rate exceeds between 150% -200% of the standard per diem rate. They approve business meal exceptions when the meal rate exceeds between 150%-200%. This role is assigned by the Dean, VP, and/or Director.
- **OSP (Office of Sponsored Programs) Approver Role:** The OSP approver is required for all travel funded by a grant. The approval is routed on the Pre-Approval request and the role is designated to all grant administrators.

APPROVALS IN CHROME RIVER

Chrome River will automatically route the reports to the appropriate approvers based on system rules and role assignments. Approvers will receive an email notification informing them when they have a Pre-Approval or Expense Report in their queue for approval and have options for approving the report.

APPROVAL VIA EMAIL

Chrome River will email approvers Pre-Approvals and Expense Reports requiring their approval. Approvers have the ability to approve **all expenses** on a report for reimbursement or **return all** expenses on the report to the expense owner with additional questions or comments from within the email. Approving or returning only specific line items within a report requires the approver to log in to the Chrome River application, which can be done through the link at the bottom of the email.

The email approvers receive includes most of the details of the report, including the ability to view receipts associated with each expense. At the bottom of the email, approvers can view an expense summary and will also see the **ACCEPT** and **RETURN** buttons.

Note: At the bottom of the report, you can click VIEW RECEIPTS link to view a PDF of all receipts attached to the report.

CHROMER RIVER APPROVER MANUAL

CHROMERIVER Report ID: Q100-5647-7417

ACTION REQUIRED Chrome River

Expense Report for **LaDonna M Brown [930912044]**
Report Name **National World Conference 2022- San Diego, CA**
Submit Date **01/25/2023**
Expense Dates **01/09/2023 - 01/09/2023**
Total Expenses **21.00 USD**

!! Compliance Warning !!
Compliance Missing Pre-Approval
Response The Pre-Approval is manually attached to the report. Thanks.

Account Summary Amount (USD)
W121310 STATE Travel Office 21.00

Expense Details

01/09/2023	Parking / Tolls	Travel Office	21.00 USD
	W121310	STATE	
Business Purpose	RIC Airport Parking in the Economy Lot		
Expense Type	ET010		
Vehicle	Personal		
Cost Code	712270		
Reason Assigned	If Primary Approver isn't Expense Owner and not Cash Advance, route to Primary Approver for Approval		

Financial Summary Amount (USD)
Total Expense Report 21.00
Less Company Paid 0.00
Amount Due Employee 21.00

APPROVE **RETURN**

To take action on these expenses, take either of the following steps:

- Click on the **APPROVE** or **RETURN** button as appropriate and add any comments to the new email that opens,
- OR **FORWARD** this email to: approve@chrome-river.com or return@chrome-river.com with any comments at the top of the forwarded message.

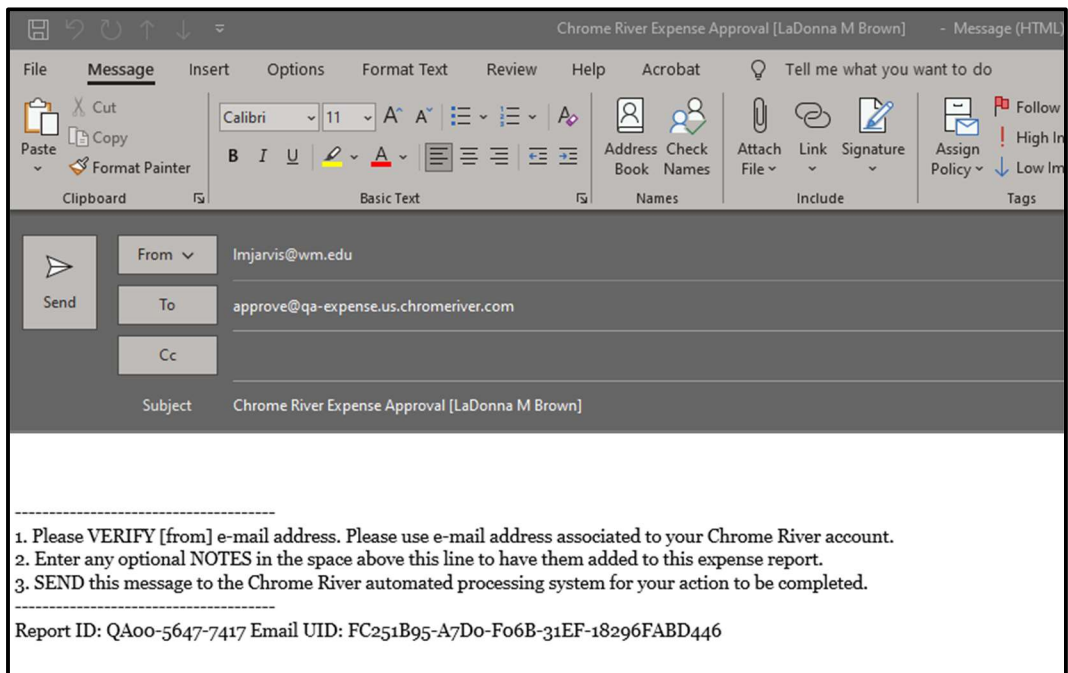
To view this expense report or access the Chrome River application, [click here](#)

Any compliance issues for line items will be noted with a Compliance Warning Flag, as well as an explanation for the compliance issue and a response from the expense owner.

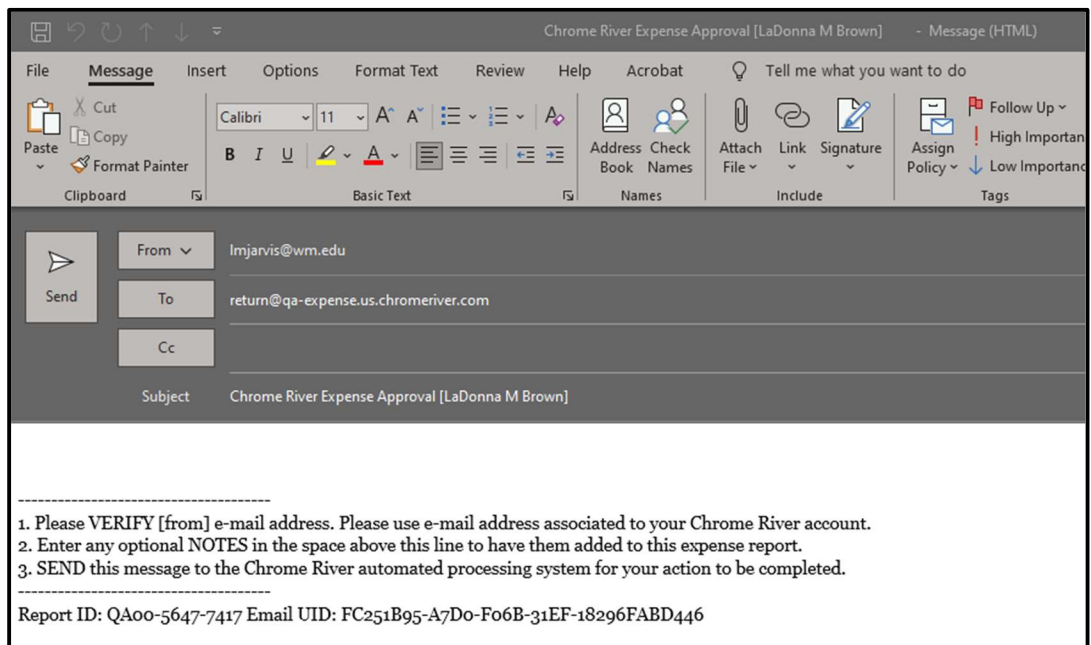
!! Compliance Warning !!
Compliance Missing Pre-Approval
Response The Pre-Approval is manually attached to the report. Thanks.

To approve a report by email, click on the **ACCEPT** button. This will bring up a new email window that you will need to **SEND**. If you have any comments you would like to include on the report, you can type them into the body of the email before sending, and they will be added to the report. Once you hit send, the system will be notified of your approval, and the report will move forward in the approval queue.

CHROMER RIVER APPROVER MANUAL



To return the report, click on the **RETURN** button. This will also bring up a new email window that you will need to **SEND**. You can enter an explanation for why you are returning the report that will be provided to the report submitter. Once you hit the send, the system will return the report back to the expense owner for corrections. If an approver returns a report, the resubmitted report will route back to the same approver and will not require additional approval from previous approvers, if applicable.



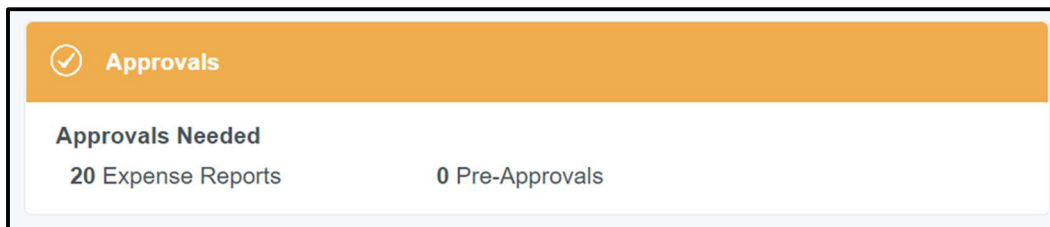
CHROMER RIVER APPROVER MANUAL

While approvers can return a report from within the email, they cannot adjust a report from within the email. Instead, they must adjust from within the Chrome River Application, which is accessible from the link at the bottom of the email.

Note: If you attempt to approve via email an expense that has since been changed, you will receive an Expense Report Approval Failure Notification email alerting you to reattempt your approval via the most recent approval email for that report.

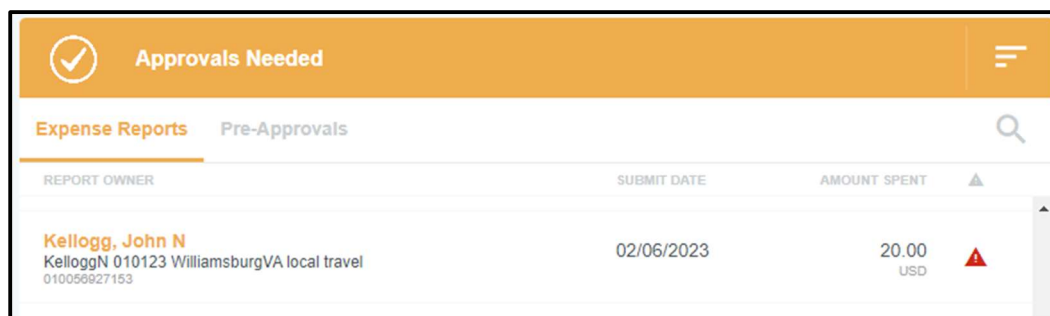
APPROVAL IN CHROME RIVER APPLICATION

After logging into Chrome River, any approvers with reports pending approval will show up in the orange box in their Dashboard. This box will display a count of the number of expense and/or pre-approval reports awaiting approval. Click on either **Expense Reports** or **Pre-Approvals** to access the respective list of reports.



Within the Approval List, you will see any reports awaiting your approval. If you would like to sort these reports differently, you can do so by clicking the menu button in the top right corner of the approval panel. If you have both Expense Reports and Pre-Approvals awaiting approval, you can toggle between the two by clicking the titles at the top. If you have many reports awaiting approval and would like to search for a specific one, you can do so by clicking magnifying glass icon and searching by Expense Owner or Report ID.

Note: Any reports submitted within compliance warnings will be noted with a red triangle symbol on the line of the report.



Click on any report in the approval list, and the report header will display in the window on the right side of the screen. This will include a summary of the expenses, funding sources, and all receipts attached to the report.

CHROMER RIVER APPROVER MANUAL

Open PDF Tracking Return Approve

KelloggN 010123 WilliamsburgVA local travel

Missing Lodging Information #313

Lodging information is required to verify per diem. Please enter lodging information. (Complete address, including zip code is required.)

RESPONSE
751 Ukrop Way Williamsburg VA 23185

Report Owner	John N Kellogg
Submit Date	02/06/2023 This report was recalled and resubmitted.
Expense Report ID	010056927153
Rule Description	All Reports go to AP Review - All Reports go to AP Review

ADJUST AN EXPENSE

The following are items that an approver can adjust on an expense:

- **Approved amount**—approvers can only adjust the approved amount down
- **Business Purpose**
- **Allocation (Index)**
- **Comments**—approvers can add additional comments, but they cannot remove comments
- **Attachments**—approvers can add additional attachments.

After making an adjustment, an adjustment note is required by the approver. They also have the option to notify the expense owner of the adjustment. If the report submitter would like to receive an email detailing the adjustment, select the **Notify Expense Owner** checkbox. If not, uncheck this box. Click **Save** to finalize the adjustment.

CHROMER RIVER APPROVER MANUAL

Cancel Save

Parking / Tolls ✓ Approve

Adjust

Actual amount of parking is \$20. Adjusting accordingly.

Notify Expense Owner

Date 01/09/2023

Amount 21.00 USD

Approved 20.00 USD

Business Purpose RIC Airport Parking in the Economy Lot

RETURN AN EXPENSE

Individual expenses can be returned to the expense owner. After click **Return** on the selected expense, the approver is required to enter an explanation of why the expense is being returned. After doing so, click **Save**.

Images Cancel Save

Parking / Tolls ✓ Approve

Return

Return Note Required

Date	01/09/2023
Amount	21.00 USD
Approved	21.00 USD
Business Purpose	RIC Airport Parking in the Economy Lot
Type	Parking
Vehicle	Personal
Agency Card	<input type="checkbox"/>

APPROVE A REPORT

After you have reviewed the report and are ready to approve, click the **Approve** button at the top of the expense report summary. Once the Approve button has been selected, the submit confirmation screen will appear. Click **Approve**.

CHROMER RIVER APPROVER MANUAL

Report Owner	LaDonna M Brown
Submit Date	01/25/2023 <small>This report was recalled and resubmitted.</small>
Expense Report ID	QA0056477417
Business Purpose	RIC Airport Parking in the Economy Lot
Rule Description	All Reports go to AP Review - All Reports go to AP Review

ADD AN APPROVAL DELEGATE

As discussed in the Role and Responsibilities section, approvers can assign another user as an approval delegate to temporarily approve expenses on their behalf. Approval delegation may only occur on a temporary basis (e.g., while an approver is on vacation). Any long-term delegation of approval must be discussed and must have prior approval and can only be assigned at a maximum one year, based on each new Fiscal Year.

To add an approval delegate, click on your name in the upper right corner and click **Settings**. Under Delegate Settings, click+ **Add Approval Delegate**.

Chrome River College of William & Mary
Creator

Personal Settings
Preferences Settings
Delegate Settings
Notification Settings
Privacy Policy
About Chrome River

My Delegates

A "Delegate" is someone who has full access to your account.

✕ LaDonna M Brown

+ Add New Delegates

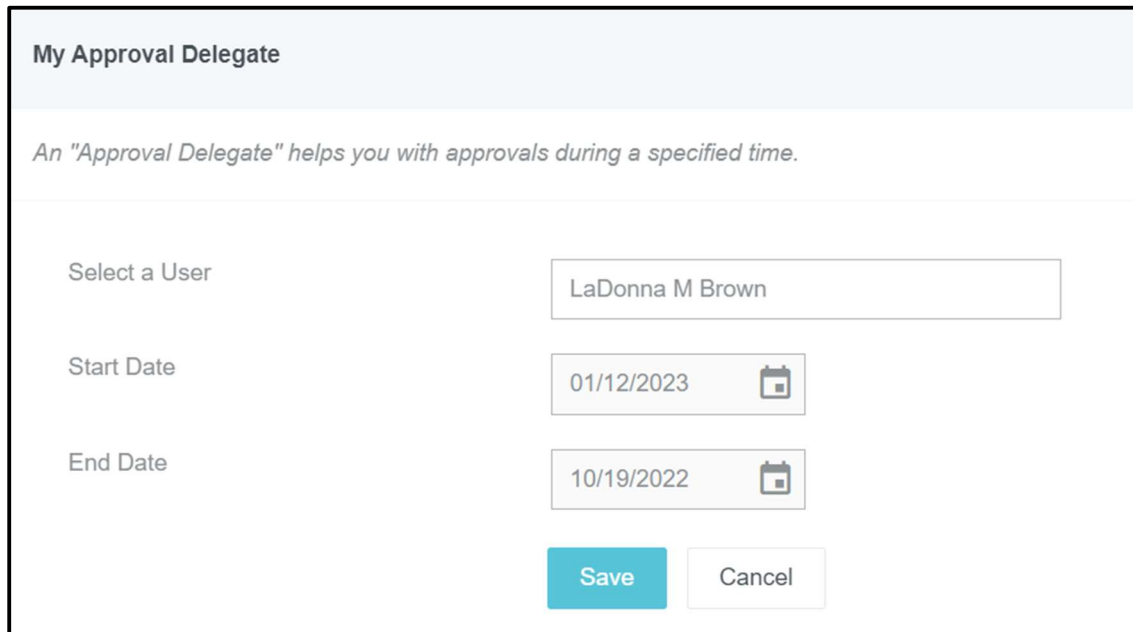
My Approval Delegate

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

+ Add Approval Delegate

CHROMER RIVER APPROVER MANUAL


Begin typing the employee's name and it will appear in the dropdown menu. Enter a **Start Date** and **End Date** for approval delegation access and click **Save**. The system will send an email to the approval delegate letting them know the approval delegation assignment and the applicable dates. You may only have one approval delegate assigned at the time.




My Approval Delegate

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

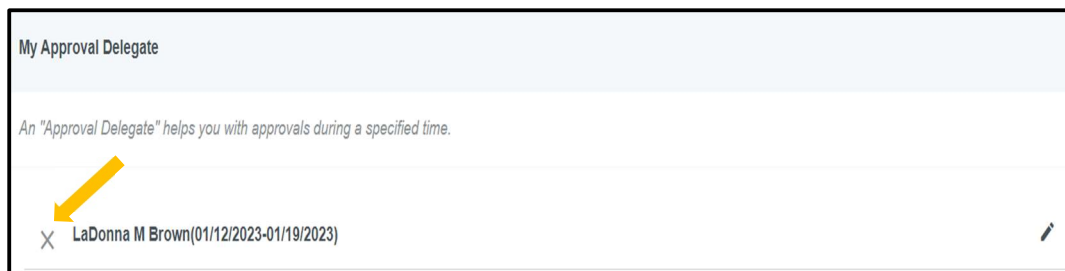
Select a User

Start Date 

End Date 


At the end of the period specified, the system will automatically deauthorize the approval delegate and return to the default approval routing. However, all reports that were routed and approved during that time will remain in the approval delegate's queue.

You may remove approval delegate access at any point by simply click the **X** next to the delegate's name.



My Approval Delegate

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

 LaDonna M Brown(01/12/2023-01/19/2023) 