Note: Only WM employees have profiles in Chrome River. A faulty or staff member will need to complete any Pre-Approval and/or Expense Report on behalf of the individual. All guests of the university to include (visiting guests, speakers, job candidates, performers, graduate assistants, and Adjunct Professors) are all considered Non-WM Affiliates.

1. Click the **+Create** button the Navigation Bar of the **Expenses** section.

2. Complete the Expense Report Header with the following:
   - **Report Name** – Provide a unique and descriptive name for the report (It is recommended that the report name, 93#, and the destination or event of the guest).
   - **Report Type** – Select Non-WM Affiliate This will open the Non-WM Affiliate Box for you to select the guests' Name and 93#. If the individual is not listed- See Note at the bottom of Page 2.
   - **Purpose** – Choose from the selected list based upon the purpose of the travel
   - **Travel Type** – Select *Domestic* or *International*
   - **Start and End Dates**– Select
   - **Business Purpose** – Select
   - **Travel to more than one location** –If traveling to multiple locations, please select 'Yes' and input each Country, City, State. There can be up to 3 destinations completed for each Expense Report. If more than 3 are traveled, please add additional destinations in the comment box.
   - **Country, City, State** – Provide the appropriate Country, City, and State for the travel destination. Country State are drop down fields and City is a free form field.

After the report header has been fully completed, click **Save** in the upper right corner to continue.

ADD EXPENSES

3. Click on the ⊕ sign with the circle to open the Add New Expense Window. Selecting **Create new** in the Add Expenses window will display expense tiles to the right. Tiles with the downward facing arrow at the bottom have additional expense tiles listed under them for you to choose for the report. Select an expense to add to the report.
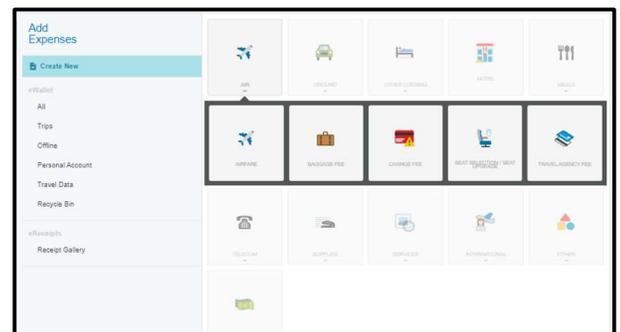
4. Complete the expense tile, including adding a receipt (where required) and selecting the Allocation (Index) where the expense should be charged. Click **Save** in the upper right corner to continue.

5. The expense will be added to your expense report and will be visible on the report summary to the left. The Add Expense window will appear again on the right side of the screen.

6. Continue adding expenses to your report by selecting the appropriate expense tile, completing the expense tile form, and clicking **Save** at the top right.

7. Once you have finished adding all expenses to your expense report, click on the green **Submit** button at the bottom of the report summary.

A submit confirmation will appear at the top right of the screen. Click **Cancel** to return to the report and make any changes. Click **Pre-Approval** to attach a previously submitted Pre-Approval report to your expense report. Click **Submit** to submit the report to the approval flow.

Note:

- If the individual is not in Chrome River, you will need to submit a request through buyW&M Vendor Management Process. https://www.wm.edu/about/administration/senioradmin/operations/initiatives/buywm/departments/vendor-management/index.php. When prompted if the vendor needs to be added to Chrome River, select the radio button option for 'Yes'. Once the request has bee completed, the updates must feed overnight through Chrome River for the Name and 93# to be available in the dropdown box.

- Attach the Non-WM Affiliate's approval email for expenses. Email the PDF of the Expense Report to the Non-WM Affiliate for approval. They can "electronically sign" in a reply email. For example: "I hereby certify that all expenses listed here are true and correct to the best of my knowledge and $xxx is the correct amount".