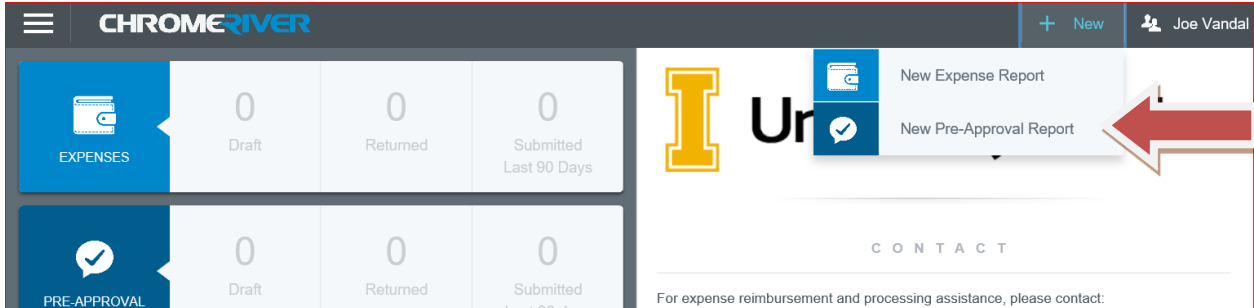


1. Access Chrome River by going to <https://support.uidaho.edu/TDClient/Requests/ServiceDet?ID=707> and selecting Chrome River under Enterprise Administrative Applications.
2. Log into Chrome River.
3. From the Dashboard, in the upper right corner, click the + NEW button.
4. From the drop down menu, select New Pre-Approval Report.



NOTE: Pre-Approvals are estimates of the total expenditures for the trip that are used to obtain trip approval from all required approvers.

5. Enter the following:
 - a. Report Name. Identify the trip requesting approval.
 - b. Please begin the title with the letters "TR PA".
 - c. Start and End Date(s).
 - d. Number of Days. This will automatically be determined by Start/End Date(s).
 - e. Pay Me In. This is automatically pre-determined.
 - f. Business Purpose. The business-related reason for the expenditures. How does it relate to your job duties? How does it benefit the department and University?
 - g. From the drop down menu, select the type of travel.
 - i. In State
 - ii. Out of State
 - iii. International
 - iv. Non Travel Expense
 - h. Enter Departure and Arrival Time
 - i. Departure City/State Destination City/State. A selection box is provided to include a second location.
 - j. GL Approver - Select Erika Crossland.
 - k. Check the Alcohol box only if you will be providing a promotional or business meal. Please be aware that Alcohol is not an allowable expense for the Purchasing Card. The cardholder will be responsible for the alcohol expense to be reimbursed.
 - l. Cash Advance Amount. Refer to the Cash Advance Travel Policy and Procedure.

The screenshot shows the 'Pre-Approvals For Joe Vandal' form. It includes fields for: Report Name (text input), Start Date (04/03/2019), End Date (04/03/2019), Number of Days (1), Pay Me In (USD - US Dollars), Business Purpose (text area), Travel Type (dropdown menu), Depart Time (Optional, dropdown menu), Arrival Time (Optional, dropdown menu), Add Another Location (checkbox), GL Approver (dropdown menu), Alcohol (checkbox), and Cash Advance Amount (Optional, 0). There are 'Cancel' and 'Save' buttons at the top right.

NOTE: If using a purchasing card, an advance can only be requested for mileage and/or meal per diem up to 90% of the expenses, unless the travel is group travel such as Student Groups or Team Travel.

- l. Banner Index. As you type, a list will prefill. Use the mouse to scroll down and left click to select the index.
- m. From the drop down menu, select the correct Activity Code.

Banner Index

646998-120948 646-07GAX-- Purchasing Card

Leave Activity Code blank

Use default Location Code from Index

+ Add Banner Index

- i. For those **Indexes that do not include Activity Codes** select: LEAVE – it will leave the Activity Code Blank.
- ii. For those **Indexes that do not include a Location Code:** select: Leave – it will leave the Location Code Blank.
- iii. For those **Indexes that include a Location Code** select: Use default Location Code from Index – it will default the location within the Index.

6. Click Save in the upper right corner.
7. Choose from the major category list of Pre-Approval icons provided and add expenditures. Other expenses can be reimbursed post-trip.

Add Pre-Approval Types

AIRFARE

GROUND TRANSPORTATION

HOTEL

MEALS / ENTERTAINMENT

PROFESSIONAL DEVELOPMENT

MISCELLANEOUS

8. Click on the icon, and enter the Estimated Amount and a brief Description with any information/comments that would be helpful for all authorized approvers and Travel Office.

Cancel Save

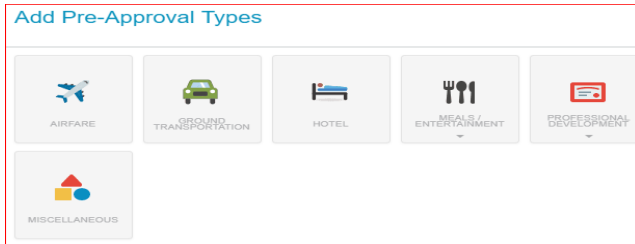
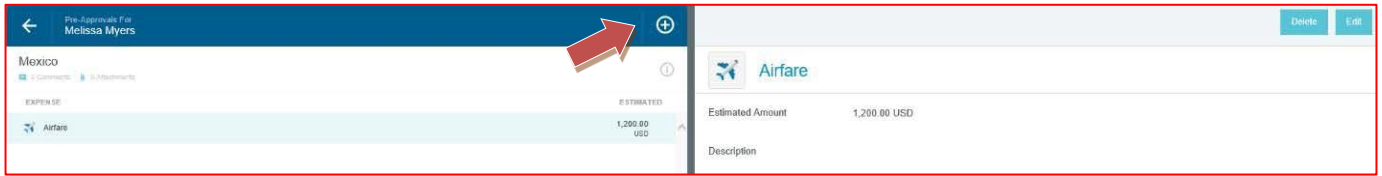
Airfare

Estimated Amount 0.00 USD

Description Optional

9. Click **Save** in the upper right corner.

10. Continue to add all expenditures by clicking the + **Button** on the left screen.

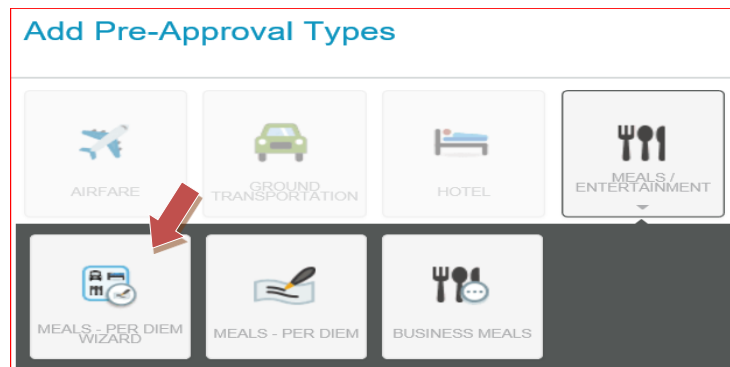


11. When creating Pre-Approvals for Group Student, Athletic, and Field Trip, you may lump the entire trip expenditures together in the Estimated Amount.

NOTE: Expenses will need to be itemized for reimbursement post-trip.

- a. Mileage. Estimate the total round-trip mileage and multiply it by the current Federal Rate. Enter the dollar amount, and list the calculation breakdown in the Description.

If the Estimate Mileage Rate is less than the Federal Rate, use the Calculator to estimate the mileage.

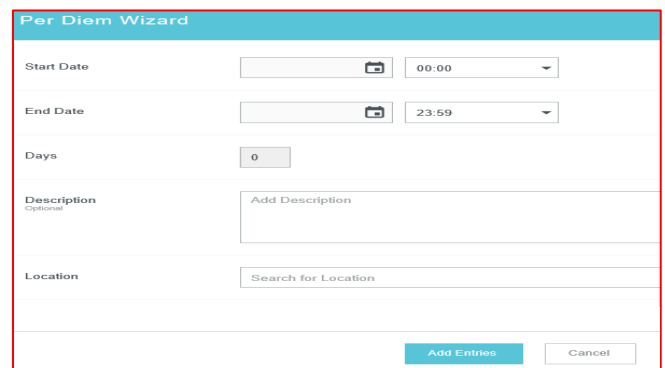


- b. Per Diem. These will automatically be calculated based on the Destination and # of travel days based on the Travel policy

- i. A Per Diem and Per Diem Wizard icon is available based on the type of travel.
- ii. The Per Diem Wizard icon allows you to enter and adjust meals for multiple days simultaneously.

- c. For meals, enter the following:

- i. Start/End Date(s).
- ii. Times, in military.
- iii. Days. Start/End Date(s) will automatically determine this.
- iv. Description. Add any information/comments that would be helpful for all authorized approvers. What meals will be provided?
- v. Location. As you type, a list will prefill. Use the mouse to scroll down and left click to select the Location.



- d. Click **Add Entries** at the bottom.

- e. A list of all the meals will appear on the right side. Click on the day(s) and check which meals you do not need and the per diem will be reduced based on your selection.

The screenshot shows a form for adding pre-approval entries. On the left, there are fields for Start Date (01/31/2019), End Date (02/01/2019), Days (2), Description (Optional), and Location (Boise-Ada County, Idaho (ID), United Sta). On the right, a table lists entries:

DATE	LOCATION	AMOUNT
× Thu, 01/31/2019	Boise, Idaho (ID), United States	55.00 USD >
× Fri, 02/01/2019	Boise, Idaho (ID), United States	55.00 USD >

Buttons at the bottom include 'Add Entries', 'Cancel', 'Clear All', and 'Add to Report'.

- f. When finished, click **Add to Report**.

12. When all information and estimated expenditures have been added, click **Submit** at the bottom.

The screenshot shows the 'Pre-Approvals For Linda Keeneey' summary screen. On the left, an 'EXPENSE' table is shown:

EXPENSE	ESTIMATED
Meals - Per Diem	50.00 USD
Meals - Per Diem	66.00 USD

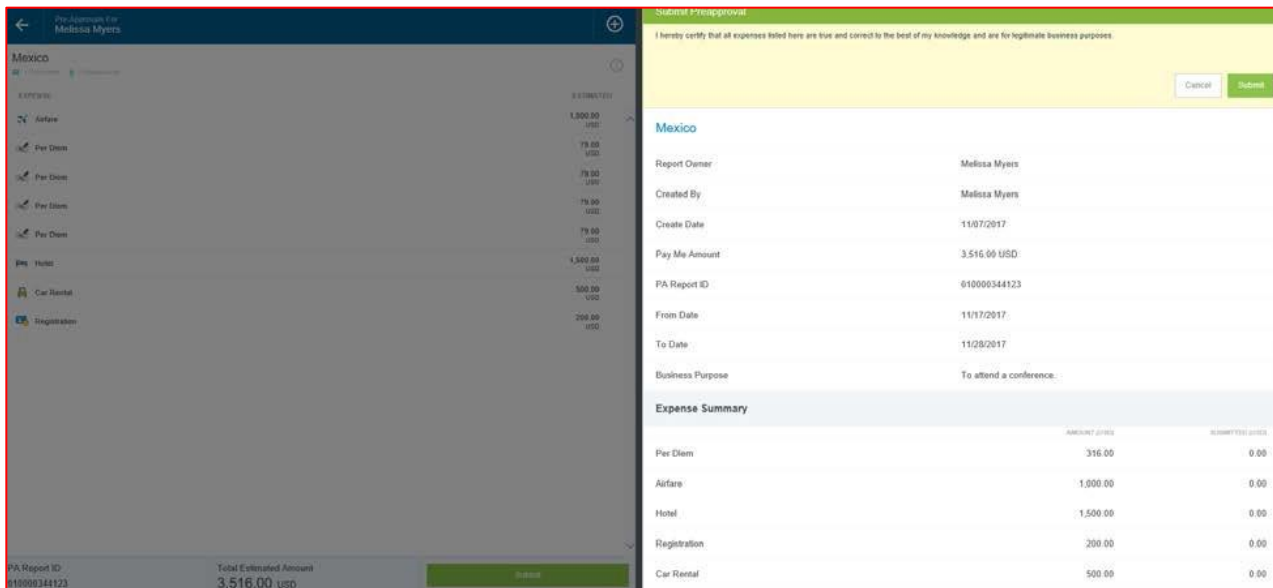
At the bottom, it shows 'PA Report ID: 010000304408', 'Total Estimated Amount: 116.00 USD', and a 'Submit' button. On the right, a section titled 'Add Pre-Approval Types' includes icons for AIRFARE, GROUND TRANSPORTATION, HOTEL, MEALS / ENTERTAINMENT, PROFESSIONAL DEVELOPMENT, and MISCELLANEOUS.

13. An overview of the trip and information will appear on the right side. Scroll down and review the information for accuracy, enter comments, and/or upload attachments.

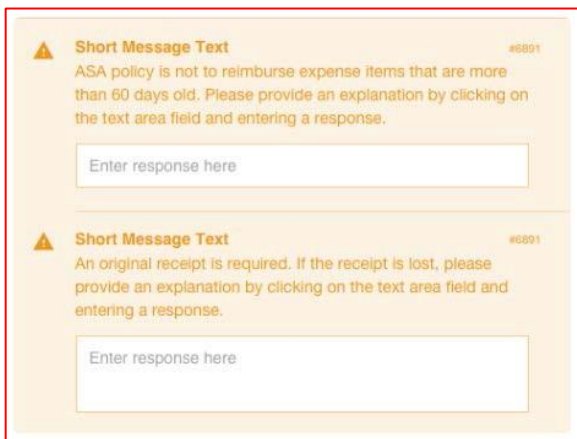
NOTE: Attachments are not required for a Pre-Approval, only for the Expense Report, unless an advance is needed more than 60 days before the departure date. For assistance, please contact the Accounts Payable Office.

14. To upload attachments, you can drag and drop or Browse File to Attach. Only JPG, PDF, PNG, and TIFF files of up to 5MB can be accepted.

15. Click **Submit** in the upper right corner.



16. If there are any issues, with the report, warnings and violations will be given and will need to be corrected before submitting for approval.



a. Warnings indicate that additional information is required before submitting the report for approval. Respond by either modifying the data or replying to the warning.

i. If a reply is required, tap **Enter Response** in the message bar and enter a reply.

ii. Enter **Save** to update and close warning message.

b. Violations indicate that the expense cannot be submitted for approval based on the Travel policies and will need to be corrected before submitting for approval.

i. If an error occurs, the Submit button will be deactivated and you will be required to make any necessary changes before continuing.

