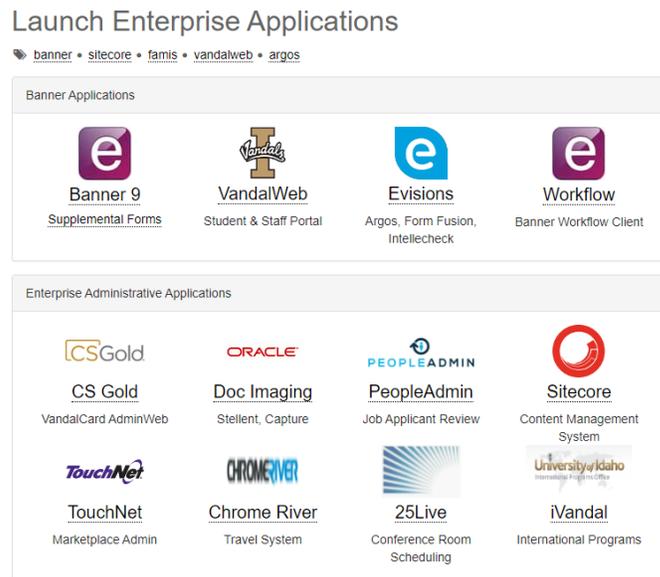


Pre-Approval Report

University policy requires travelers to seek formal authorization prior to travel using or spending university funds, Chrome River allows users to submit pre-approval reports. Users will also be required to submit a pre-approval report for any cash advance requests.

1. Log into Chrome River using the icon on the Launch Enterprise Applications webpage:
<https://support.uidaho.edu/TDClient/40/Portal/Requests/ServiceDet?ID=707>



Launch Enterprise Applications

banner • sitecore • famis • vandalweb • argos

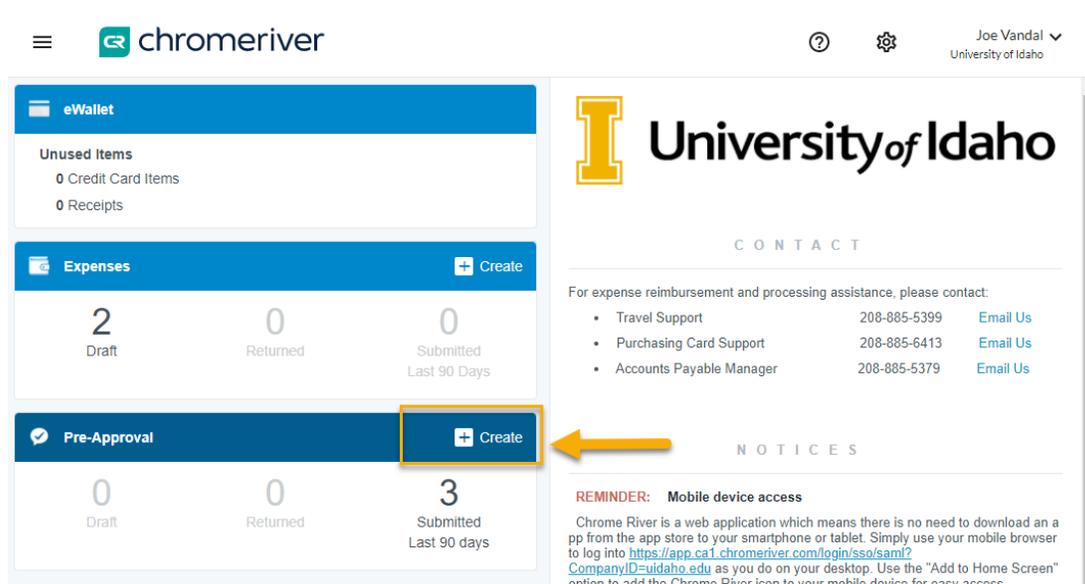
Banner Applications

- Banner 9**
Supplemental Forms
- VandalWeb**
Student & Staff Portal
- Evisions**
Argos, Form Fusion, Intellectcheck
- Workflow**
Banner Workflow Client

Enterprise Administrative Applications

- CS Gold**
VandalCard AdminWeb
- Doc Imaging**
Stellent, Capture
- PeopleAdmin**
Job Applicant Review
- Sitecore**
Content Management System
- TouchNet**
Marketplace Admin
- Chrome River**
Travel System
- 25Live**
Conference Room Scheduling
- iVandal**
International Programs

2. To create a pre-approval report, click **+ New** on the Navigation Bar and **New Pre-Approval Report**.



chromeriver Joe Vandal University of Idaho

eWallet

Unused Items

- 0 Credit Card Items
- 0 Receipts

Expenses + Create

2 Draft	0 Returned	0 Submitted Last 90 Days
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Pre-Approval + Create

0 Draft	0 Returned	3 Submitted Last 90 days
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CONTACT

For expense reimbursement and processing assistance, please contact:

- Travel Support 208-885-5399 [Email Us](#)
- Purchasing Card Support 208-885-6413 [Email Us](#)
- Accounts Payable Manager 208-885-5379 [Email Us](#)

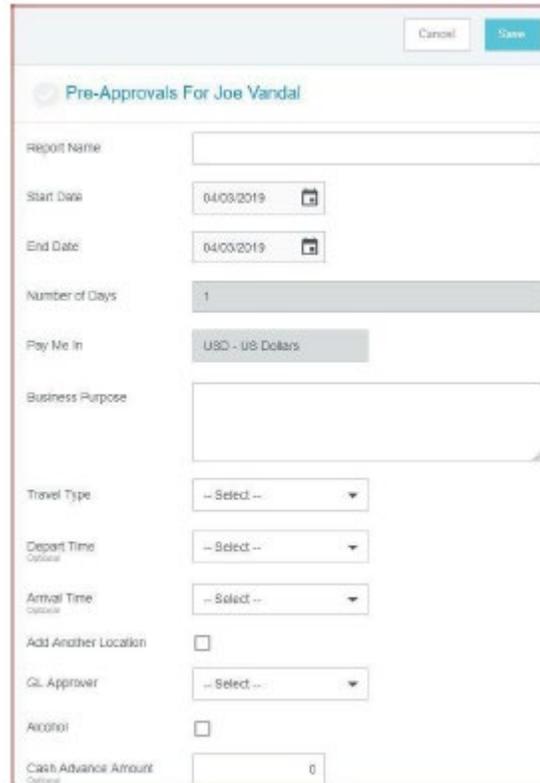
NOTICES

REMINDER: Mobile device access

Chrome River is a web application which means there is no need to download an app from the app store to your smartphone or tablet. Simply use your mobile browser to log into <https://app.ca1.chromeriver.com/login/sso/saml?CompanyID=uidaho.edu> as you do on your desktop. Use the "Add to Home Screen" option to add the Chrome River icon to your mobile device for easy access.

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

3. This will bring you to the pre-approval report header. All fields are required, except where labeled as optional.



Description of the fields are below:

- **Report Name** – Enter a descriptive, unique report name
- **Start Date** – Click the calendar icon to select the start date of your trip. If this is a non-travel pre-approval, enter the expected date of the transaction
- **End Date** - Click the calendar icon to select the end date of your trip. If this is a non-travel pre-approval, enter the expected date of the transaction
- **Number of Days** – This will calculate automatically based on the start and end date entered
- **Pay Me In** - This is automatically pre-determined.
- **Business Purpose** – Provide a detailed explanation of the business purpose of this request, including who, what, where, and why, as appropriate
- **Description** – Enter any necessary additional information here. This field is optional
- **Pre-Approval Type** – Select In State, Out of State, or International
- **Enter Departure and Arrival Time**

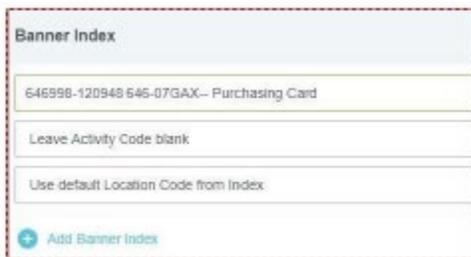
- **Trip Destination** – If the Pre-Approval Type of Domestic or International is selected, enter the trip destination (City, State for Domestic or Country for International – begin typing to filter and find the appropriate destination). This field does not appear for non-travel pre-approvals
- **GL Approver** - Select the individual from the dropdown who is responsible for verifying index information.
- **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.

- **Cash Advance** – If requesting a cash advance, select Cash Advance Requested. Note that per the Travel Policy, travel advances must be requested and approved through a pre-approval report and are only allowed in limited circumstances, typically when a credit card cannot be used as an appropriate or effective means of payment. Also, note that any cash advances granted via a pre-approval will need to be cleared via a submitted expense report. See the Cash Advance and Cash Advance Return sections under Expense Reports to learn more.
- **Cash Advance Amount** – If you selected Yes for Cash Advance, you will be asked to enter the amount being requested.

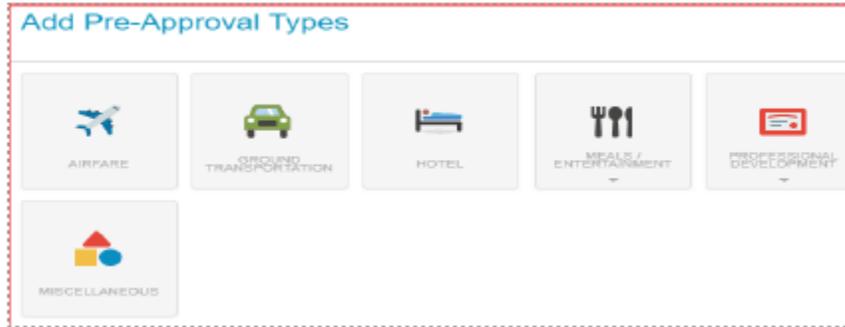
NOTE: If using a purchasing card, an advance can only be requested for mileage and/or meal per diem up to 90% of the expenses, unless the travel is group travel such as Student Groups or Team Travel.

- **Index** – Select the Index(s) where the spending will be charged. To add more than one index, click + **Add Banner Index**.
 1. For those Indexes that do not include Activity Codes select: LEAVE – it will leave the Activity Code Blank. If you select USE DEFAULT - is will fill in the default assigned within the index or select the activity code from the drop-down menu.
 2. For those Indexes that include a Location Code select: from the drop-down menu. For those who do not use the location codes select: LEAVE it will leave the Location Code Blank

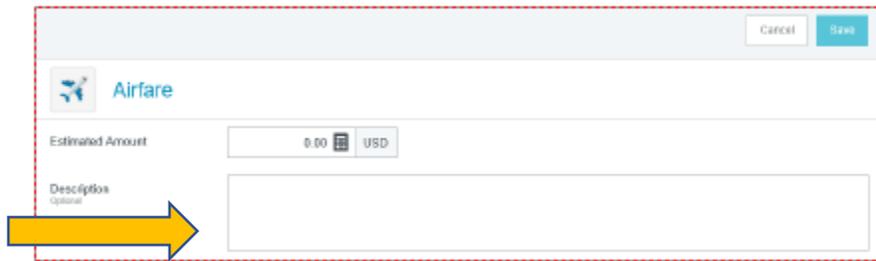


Once complete, click **Save** in the top right corner, and the Add Expenses window will now appear

4. Add Expenses - The expense tile mosaic will now display, allowing you to add expenses to your pre-approval report. To add an expense, simply click on the expense tile and complete the form that displays. Note that any tiles with a downward facing arrow at the bottom middle are “parent” tiles that have additional expense tiles organized under them. (Example: Per Diem and Travel Meals are located under Meals.) The parent tile cannot be added to a report but any tiles under it can.

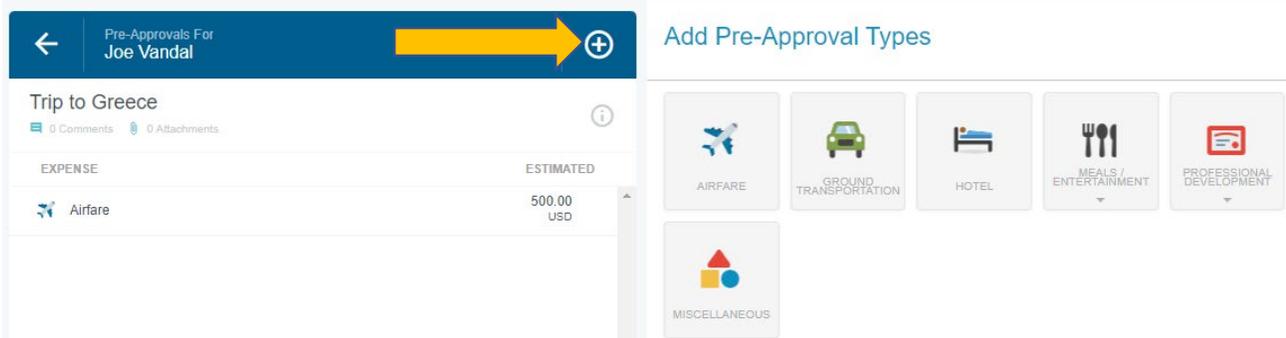


- Click on the icon and enter the Estimated Amount and a brief Description with any information/comments that would be helpful for all authorized approvers.



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

- Continue to add all expenditures by clicking the + Button on the left screen



Note: When creating Pre-Approvals for Group Student, Athletic, and Field Trip, you may lump the entire trip expenditures together in the Estimated Amount. Expenses will need to be itemized for reimbursement post-trip.

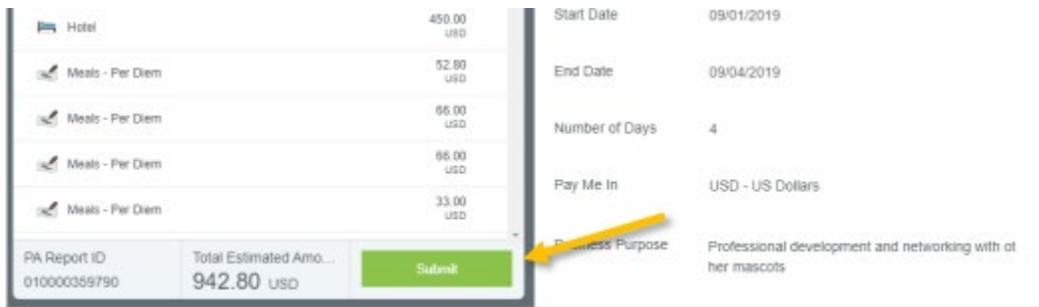
- Mileage. Estimate the total round-trip mileage and multiply it by the current Federal Rate. Enter the dollar amount and list the calculation breakdown in the Description. If the Estimate Mileage Rate is less than the Federal Rate, use the Calculator to estimate the mileage.
- Per Diem. These will automatically be calculated based on the Destination and # of travel days based on the Travel policy.
 - A Per Diem and Per Diem Wizard icon is available based on the type of travel.
 - The Per Diem Wizard icon allows you to enter and adjust meals for multiple days simultaneously.
- For meals, enter the following:
 - Start/End Date(s).
 - Times, in military.

CHROME RIVER USER GUIDE

3. Days. Start/End Date(s) will automatically determine this.
 4. Description. Add any information/comments that would be helpful for all authorized approvers.
What meals will be provided?
 5. Location. As you type, a list will prefill. Use the mouse to scroll down and left click to select the Location.
- Click Add Entries at the bottom.
 - 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.

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

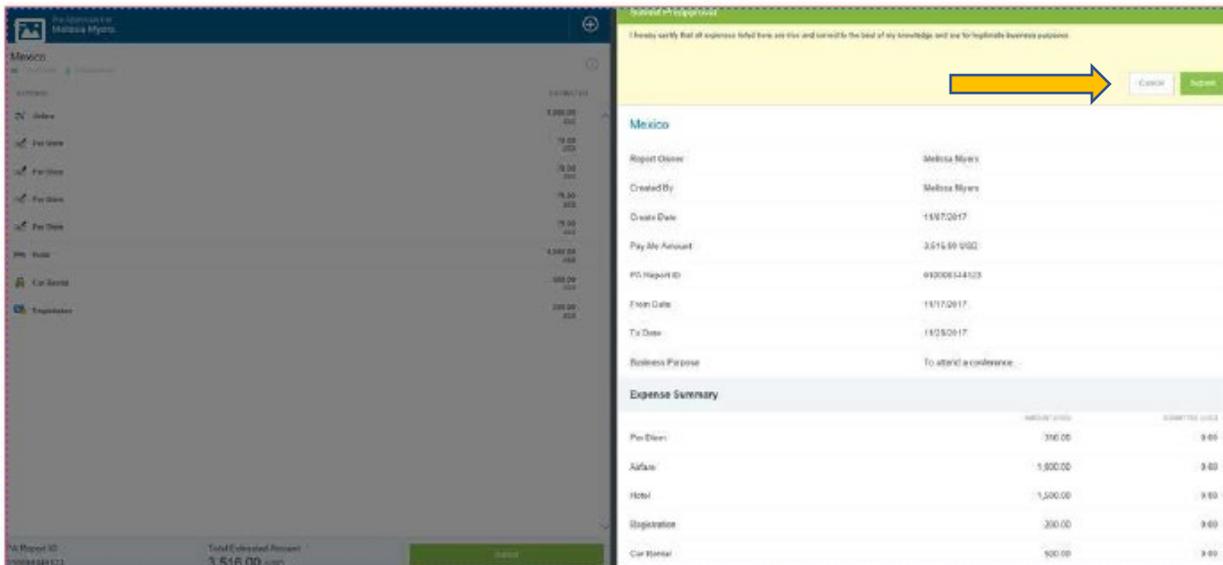
7. When all information and estimated expenditures have been added, click **Submit** at the bottom



Item	Amount	Start Date	End Date	Number of Days	Pay Me In	Business Purpose
Hotel	450.00 USD	09/01/2019	09/04/2019	4	USD - US Dollars	Professional development and networking with other mascots
Meals - Per Diem	52.80 USD					
Meals - Per Diem	66.00 USD					
Meals - Per Diem	66.00 USD					
Meals - Per Diem	33.00 USD					

PA Report ID: 010000359790 | Total Estimated Amount: 942.80 USD | **Submit**

8. 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.
9. 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.
10. Click **Submit** in the upper right corner.



Mexico

Report Owner: Melissa Myers
Created By: Melissa Myers
Created Date: 11/17/2017
Pay Me Amount: 3,516.00 USD
PA Report ID: 092006144123
Event Date: 11/17/2017
Tax Date: 11/28/2017
Business Purpose: To attend a conference...

Expense Summary	AMOUNT (USD)	QUANTITY (DAYS)
Per Diem	396.00	9.00
Airfare	5,800.00	9.00
Hotel	1,300.00	9.00
Registration	300.00	9.00
Car Rental	500.00	9.00

PA Report ID: 00998341022 | Total Estimated Amount: 3,516.00 USD | **Submit**

11. 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.



If a reply is required, tap **Enter Response** in the message bar and enter a reply. **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. If an error occurs, the Submit button will be deactivated and you will be required to make any necessary changes before continuing.

