



Five Steps to Create and Submit Chrome River Pre-Approvals

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STEP 1: Select Your Traveler

Click your name in the corner of the page and choose **Select another user**:

The screenshot shows the Chrome River interface. On the left, there are two main sections: 'Expenses' and 'Pre-Approval', each with a 'Create' button and a table showing counts for Draft, Returned, and Submitted items. On the right, there is a user menu in the top right corner. A red arrow points to the user menu, and another red arrow points to the 'Select Another User' option. Below the menu, there is an 'ANNOUNCEMENTS' section with a red header 'EFFECTIVE 7/22/21-PRESENT:' and three bullet points regarding travel policies.

You can then search for your traveler by either the name, Ball State ID#, or Title (note students appear as **STUDENT**):

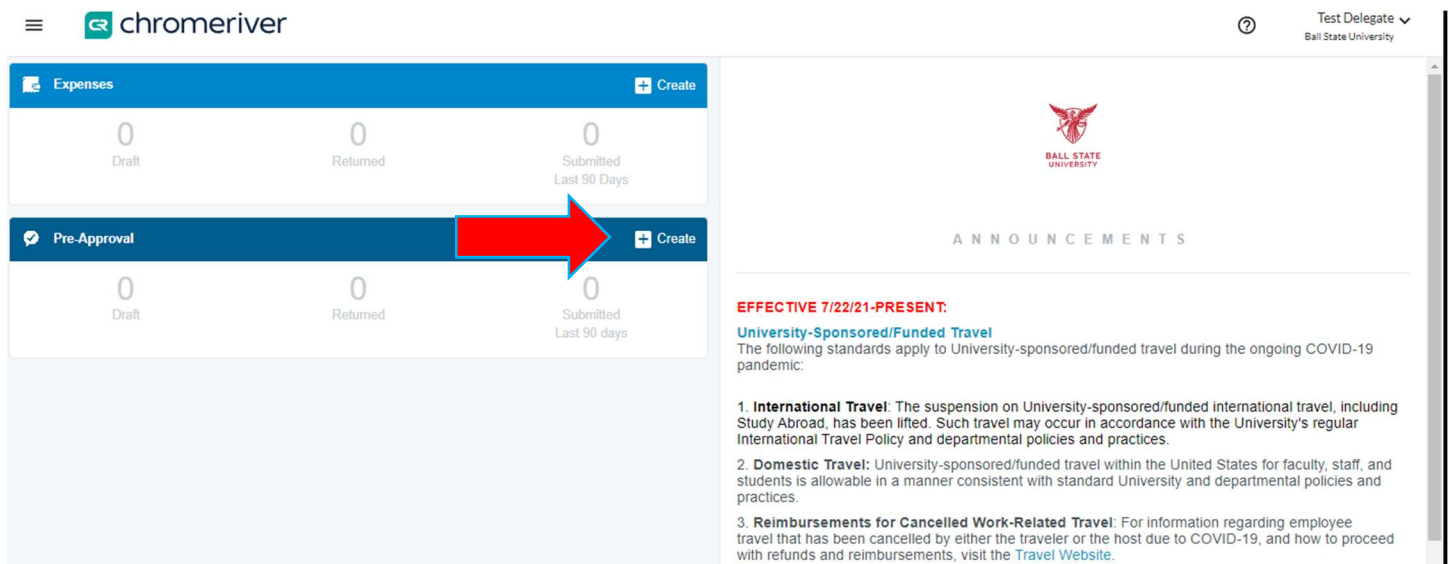
The screenshot shows a 'Select Another User' search dialog. It has a search bar labeled 'Search for Name' and a list of results. The results are:

- A'Lanni Chaney
901389212 STUDENT
- Aadarsh Patel
901412410 STUDENT
- Aahjane Bourmes
901370188 STUDENT

At the bottom, there is a checkbox labeled 'Include Departed in search' which is currently unchecked.

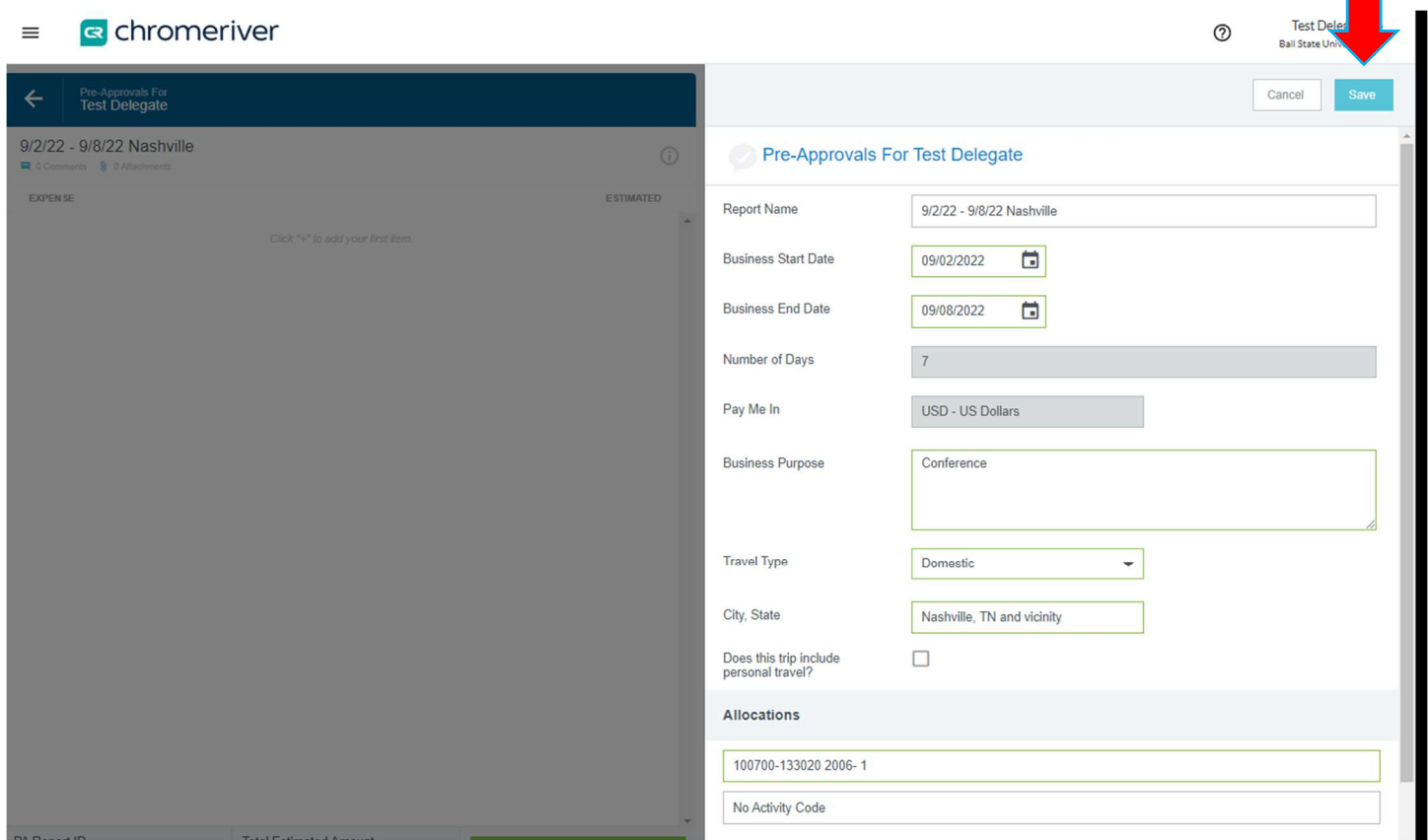
STEP 2: Complete the Header

Click **+ Create** in the right corner of the Pre-Approval section:



The screenshot shows the Chromeriver interface. On the left, there are two sections: 'Expenses' and 'Pre-Approval'. Both sections show counts for 'Draft', 'Returned', and 'Submitted Last 90 Days'. The 'Pre-Approval' section has a red arrow pointing to the '+ Create' button. On the right, there is a 'Test Delegate' dropdown menu and a 'Ball State University' logo. Below the logo, there is an 'ANNOUNCEMENTS' section with a heading 'EFFECTIVE 7/22/21-PRESENT: University-Sponsored/Funded Travel'. The text below the heading states: 'The following standards apply to University-sponsored/funded travel during the ongoing COVID-19 pandemic:'. There are three numbered items: 1. **International Travel:** The suspension on University-sponsored/funded international travel, including Study Abroad, has been lifted. Such travel may occur in accordance with the University's regular International Travel Policy and departmental policies and practices. 2. **Domestic Travel:** University-sponsored/funded travel within the United States for faculty, staff, and students is allowable in a manner consistent with standard University and departmental policies and practices. 3. **Reimbursements for Cancelled Work-Related Travel:** For information regarding employee travel that has been cancelled by either the traveler or the host due to COVID-19, and how to proceed with refunds and reimbursements, visit the [Travel Website](#).

Complete the header and click **Save**:



The screenshot shows the Chromeriver interface with the 'Pre-Approvals For Test Delegate' form. The form is titled 'Pre-Approvals For Test Delegate' and has a 'Cancel' button and a 'Save' button. The form fields are: Report Name (9/2/22 - 9/8/22 Nashville), Business Start Date (09/02/2022), Business End Date (09/08/2022), Number of Days (7), Pay Me In (USD - US Dollars), Business Purpose (Conference), Travel Type (Domestic), City, State (Nashville, TN and vicinity), Does this trip include personal travel? (checkbox), Allocations (100700-133020 2006- 1), and No Activity Code. The form is also titled 'Pre-Approvals For Test Delegate' and has a 'Cancel' button and a 'Save' button. The form is also titled 'Pre-Approvals For Test Delegate' and has a 'Cancel' button and a 'Save' button.

- **Report Name** should be the dates of travel and the location
- **Business Purpose** can be something like **Attending a conference** or **Recruiting**
- **Travel Type** is the actual destination of travel:

- if **Domestic**, the **City, State** combination is preloaded – start typing to find your city: Be sure to choose the correct state. You may notice ‘and vicinity’, this will account for neighboring cities around the destination.

City, State	Nashv
Does this trip include personal travel?	Nashville, AR and vicinity
Allocations	Nashville, GA and vicinity
	Nashville, IL and vicinity

- if **International**, enter the city manually and choose the **Country** from the preloaded list:

International City Destination(s)	London, Yorkshire, Kent
Country	United Kin
Does this trip include personal travel?	United Kingdom

-
- If the trip includes personal travel, select the **Does this trip include personal travel?** checkbox and enter the dates of personal travel.
- Choose an initial FOAPAL allocation:
 - The format for the first line is (Fund-Org Program Chart of Accounts); you can begin typing to find your allocation. Only valid FOAPAL combinations will appear in this line to select.
 - After entering the first line, a second line will appear. The second line is strictly for activity codes. If you will not be using an activity code, select **No Activity Code** from the list.

If the request will have multiple FOAPAL allocations, you will correct that prior to submission.

STEP 3: Add Expenses

Click and complete the applicable expense types and click **Save**. Please review all information on the form.

Notes concerning certain expenses:

- Use **Personal Mileage – Set Rates** for trips to Indianapolis (city center and Airport) and Dayton Airport. Use **Mileage – Personal Vehicle** for all other mileage.
- If a conference or registration fee is being paid for with a departmental purchasing card, do not add the expense to the Pre-Approval. Only use the **Conference/Registration Fees** expense type if the Travel Department should pay for the expense.
- If you would like the University to pay for your travel expenses directly:
 - Choose the **University travel card through Egencia** option for airfare, hotel, or rail; if approved, the Travel Department card can be used to book the above items, in Egencia, up to the limits set on the

Pre-Approval. (if there is a special conference rate for please see below for **University Paid** expense type)

- For conference registrations, choose the **University Travel Card** payment method (if a departmental purchasing card is not available or other payment method is not available or feasible).
- Use the **University Paid** expense type if you are requesting the Travel Department to pay for other items, like group admission on a field study tour. Also, to be included under **University paid**: conference rate hotels (these cannot be reserved through Egencia), travel management company invoices for group flights/lodging.
- Use the **Non-Reimbursable** expense type only to record expenses funded from external sources or expenses for which funding is not currently available. The **Non-Reimbursable** type should not be used if requesting that the Travel Department pay for airfare, hotel, or rail. - see above for those situations.

Notes regarding form fields:

- Date fields should match or be within the date fields on the header
- Certain form fields will include a payment method – if wanting to use Egencia for air, hotel, or rail, or if wanting the University to pay for a conference registration directly, ensure the appropriate **University Travel Card** payment option is selected
- Some expense types will have some instructions or reminders to be reviewed prior to completion; these sentences are highlighted in blue and are informational only (see Hotel expense entry screen, below)

Examples below for the trip above:


The screenshot shows the Chromeriver Pre-Approval Form for Test Traveler Las Vegas 10/3-10/5/2022. The form is titled "Pre-Approval For Test Traveler" and includes a header with the Chromeriver logo and user information (Test Traveler, Ball State University). The main content area is divided into two sections: "EXPENSE" and "ESTIMATED". The "EXPENSE" section contains a list of expense types, each with a corresponding icon and a dropdown arrow. The "ESTIMATED" section is currently empty, with a prompt to "Click '+' to add your first item". A red arrow points to the "NON-REIMBURSABLE" option in the "EXPENSE" list. The bottom of the form displays the PA Report ID 010001265598, a Total Estimated Amount of 0.00 USD, and a Submit button.

EXPENSE	ESTIMATED
Click "+" to add your first item.	

PA Report ID: 010001265598

Total Estimated Amount: 0.00 USD

Submit



Hotel

Cancel

Save

Estimated Amount

640.00 USD

Check In Date

10/03/2022

Check Out Date

10/05/2022

Description

Optional

Hotel Name

Optional

Marriott

Estimated Lodging Cost

600

Estimated Parking Cost

40

Estimated Internet Cost

0

Estimated Miscellaneous Cost

0


Payment Method

University travel card through Egencia

Please see Travel website for current rate information.

If wanting the University to pay a conference hotel rate, please enter under the category "University Paid".

To edit or delete an expense type, click the expense type from the left-hand side of the page and click **Delete** or **Edit**:



Baggage Fee

Delete

Edit

Estimated Amount

30.00 USD

Description

1 checked bag

Number of Checked Bags

1

STEP 4: Update Allocation & Add Attachments/Comments

After all expenses have been added, click the Report Description to display the header information again:

The screenshot shows the Chromeriver interface. At the top, there's a navigation bar with the Chromeriver logo and a user profile 'Test Traveler' from Ball State University. Below the navigation bar, there's a header for 'Pre-Approvals For Test Traveler'. A red arrow points to the report title 'Test Traveler Las Vegas 10/3-10/5/2022'. To the right of the report title, there's a button 'Add Pre-Approval Types'. Below the report title, there's a table of expenses:

EXPENSE	ESTIMATED
Hotel	640.00 USD
Baggage Fee	30.00 USD
Airfare	800.00 USD
Personal mileage - set rates	62.25 USD
Meals - Daily Rate	96.00 USD

To the right of the expense table, there's a grid of icons representing different types of expenses: AIRFARE, UNIVERSITY VEHICLE, GROUND TRANSPORTATION, HOTEL, MEALS, CONFERENCE / REGISTRATION FEES, MISCELLANEOUS, UNIVERSITY PAID, CASH ADVANCE, and NON-REIMBURSABLE.

Click **Edit**:

The screenshot shows the Chromeriver interface. At the top, there's a navigation bar with the Chromeriver logo and a user profile 'Test Traveler' from Ball State University. Below the navigation bar, there's a header for 'Pre-Approvals For Test Traveler'. A red arrow points to the 'Edit' button. Below the 'Edit' button, there's a form for 'Pre-Approvals For Test Traveler' with the following fields:

- Report Name: Test Traveler Las Vegas 10/3-10/5/2022
- Business Start Date: 10/03/2022
- Business End Date: 10/05/2022
- Number of Days: 3
- Pay Me In: USD - US Dollars
- Business Purpose: Attending Conference
- Travel Type: Domestic
- City, State: Las Vegas, NV and vicinity
- Does this trip include personal travel?: ☐

Below the form, there's a section for 'Allocations' with the following data:


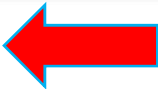
Allocation Code	Amount
100700-133020	1,628.25

To enter multiple FOAPALs for this request, click **Add Allocation**. Continue to click **Add Allocation** until the number of splits is listed:

Allocations



100700-133020 2006- 1


No Activity Code

 Add Allocation 

You can split the allocations by percentage or dollar amount.


Allocations


 100700-133020 2006- 1

70.00 %

1,139.78




No Activity Code

 100100-133020 2006- 1


30.00 %

488.47



No Activity Code

100.00 % 1,628.25

 Add Allocation

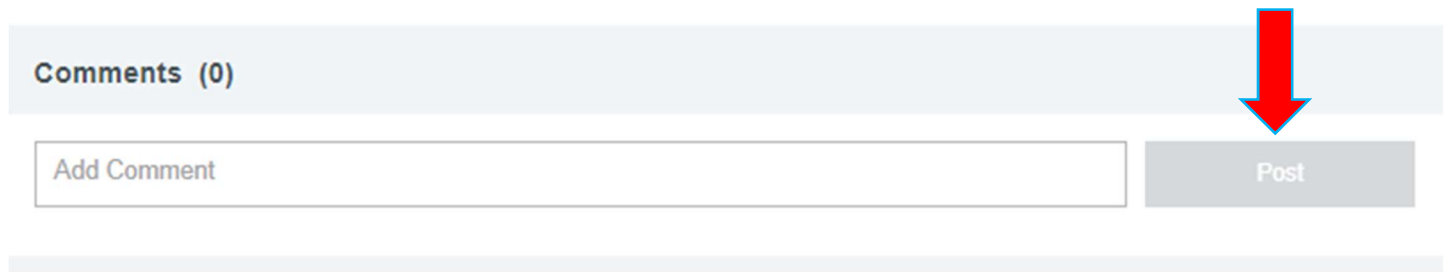
Enter the appropriate FOAPALs and amounts and click **Save**.

You can add comments or attachments by clicking on any expense type and then clicking **Edit**. Please note:

- Chrome River can only attach documents of the following types: PDF, PNG, and JPEG. Other documents, like MS Office documents, would need to be converted to one of the above types prior to upload.
- You do not need to upload receipts on every expense type – you can take a file of receipts and attach it to any expense type on the report to satisfy the receipts requirement.

COMMENTS:

To add comments, click in the [Add Comment](#) field, enter your comment, and click [Post](#). Note that Chrome River does not allow comments to be directed towards specific parties, but the comments are visible to anyone accessing the report and would appear on approval e-mails. Travel is not notified when comments are added to a report.



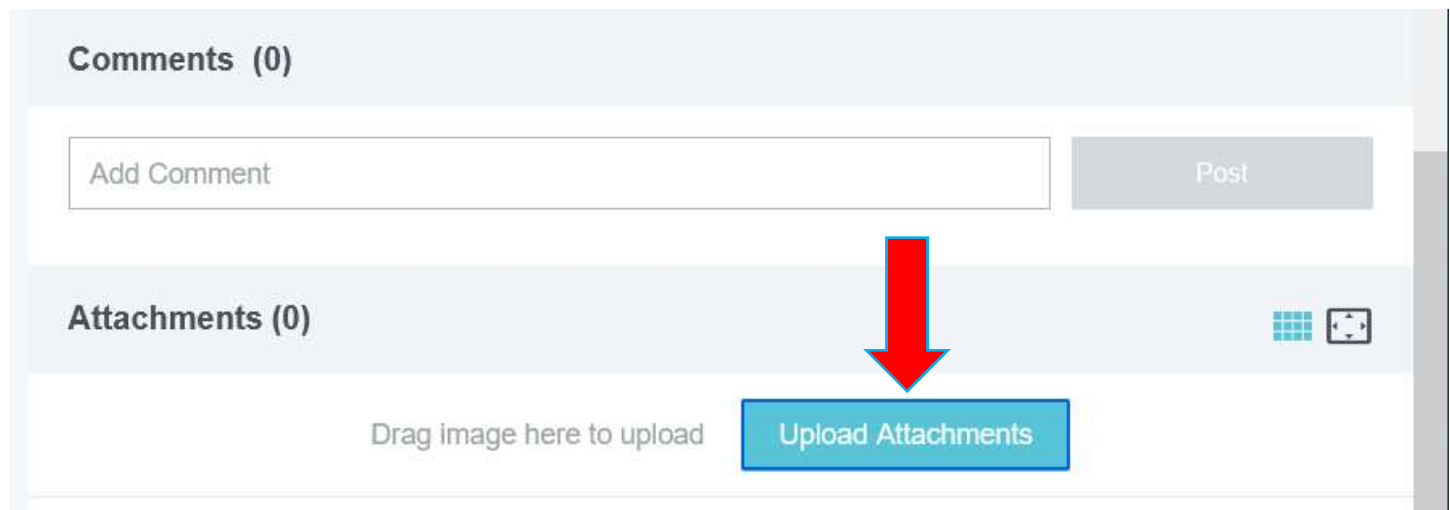
Comments (0)

Add Comment

Post

ATTACHMENTS:

To upload, click [Upload Attachments](#) and select your documents.



Comments (0)

Add Comment

Post

Attachments (0)

Drag image here to upload

Upload Attachments

STEP 5: Submit

Click **Submit**:

Test Traveler
Ball State University

Pre-Approvals For Test Traveler

Test Traveler Las Vegas 10/3-10/5/2022

EXPENSE

ESTIMATED

Hotel	640.00 USD
Baggage Fee	30.00 USD
Airfare	800.00 USD
Personal mileage - set rates	62.25 USD
Meals - Daily Rate	96.00 USD

PA Report ID
010001265598

Total Estimated Amount
1,628.25 USD

Submit

PDF

Images

Delete

Edit

Pre-Approvals For Test Traveler

Report Name

Test Traveler Las Vegas 10/3-10/5/2022

Business Start Date

10/03/2022

Business End Date

10/05/2022

Number of Days

3

Pay Me In

USD - US Dollars

Business Purpose

Attending Conference

Travel Type

Domestic

City, State

Las Vegas, NV and vicinity

Does this trip include personal travel?

☐

You can then perform a final review of all information on the right-hand side before clicking **Submit** again:

Test Traveler
Ball State University

Pre-Approvals For Test Traveler

Test Traveler Las Vegas 10/3-10/5/2022

EXPENSE

ESTIMATED

Hotel	640.00 USD
Baggage Fee	30.00 USD
Airfare	800.00 USD
Personal mileage - set rates	62.25 USD
Meals - Daily Rate	96.00 USD

PA Report ID
010001265598

Total Estimated Amount
1,628.25 USD

Submit

Submit Preapproval

I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.

Cancel

Submit

Test Traveler Las Vegas 10/3-10/5/2022

Report Owner

Test Traveler

Created By

Travel Dept

Create Date

08/10/2022

Pay Me Amount

1,628.25 USD

PA Report ID

010001265598

From Date

10/03/2022

To Date

10/05/2022

Business Purpose

Attending Conference

At that point, you may see a compliance warning, violation, or both:

- **Warnings** are in orange font; you must either correct the expense or enter information validating the expense to proceed with submission.
- **Violations** are in red font; you must correct the expense before you can proceed.



Test Traveler 
Ball State University

Submit Preapproval

I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.

Cancel

Submit



Baggage or Wi-Fi Expense Without Airfare

#615

Pre-Approval contains baggage fees or Wi-Fi expenses but no Airfare expense type exists. Please explain.

Add Response

Please enter a response...



Hotel - Check-in/Check-out Dates are outside of dates on Header

#629

Hotel - Check-in/Check-out Dates are outside of dates on Header

Report Owner

Test Traveler

Created By

Travel Dept

Create Date

08/10/2020

To correct the expense, click **Cancel**. For the violation above, we can click on the Report Description to see what values were entered at the header. Then we can click the expense type itself, click **Edit**, make the appropriate adjustments, and click **Save**:


HEADER:

PDF ▾

Images

Delete

Edit

 **Pre-Approvals For Test Traveler**

Report Name	Test Traveler Las Vegas 10/3-10/5/2022
Business Start Date	10/03/2022
Business End Date	10/05/2022
Number of Days	3

EXPENSE:


?

⚙


Test Traveler ▾
Ball State University

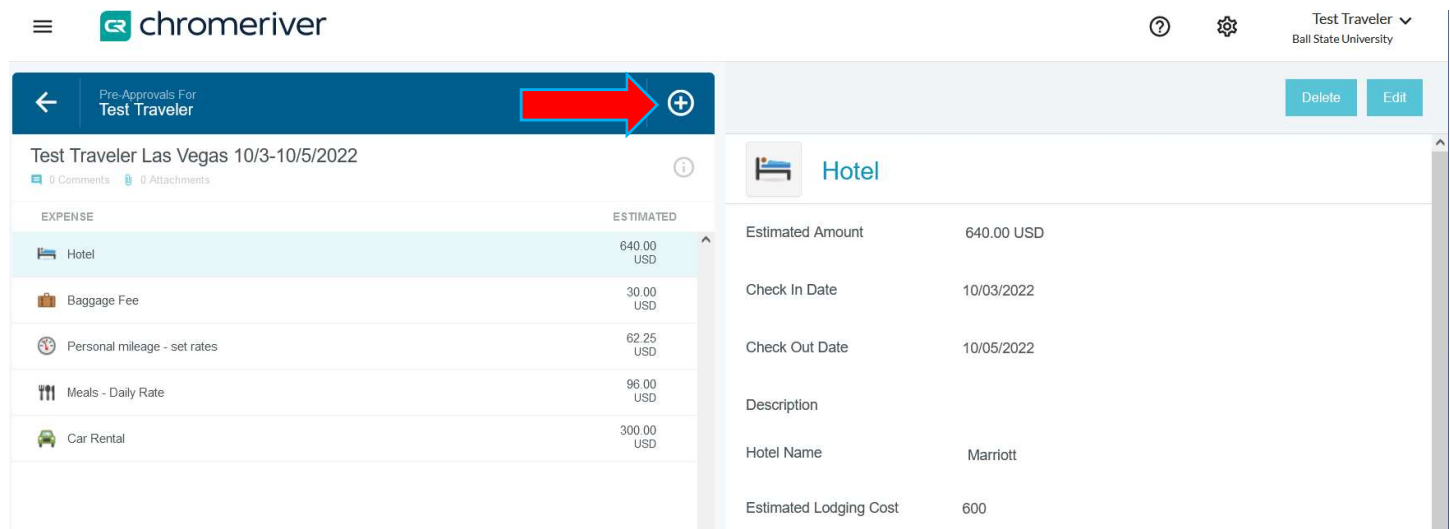
Delete

Edit

 **Hotel**

Estimated Amount	640.00 USD
Check In Date	10/03/2022
Check Out Date	10/06/2022
Description	
Hotel Name	Marriott
Estimated Lodging Cost	600

For the warning, we can add the airline expense we forgot to add by clicking the  symbol below:



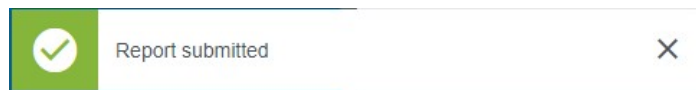
The screenshot shows the Chromeriver interface. At the top, there is a navigation bar with a hamburger menu, the Chromeriver logo, and user information (Test Traveler, Ball State University). Below the navigation bar, there is a header for the report: "Test Traveler Las Vegas 10/3-10/5/2022". A red arrow points to a plus icon in the top right of the header. The main content area is divided into two sections. The left section is a table of expenses, and the right section is a details panel for the selected "Hotel" expense.

EXPENSE	ESTIMATED
Hotel	640.00 USD
Baggage Fee	30.00 USD
Personal mileage - set rates	62.25 USD
Meals - Daily Rate	96.00 USD
Car Rental	300.00 USD

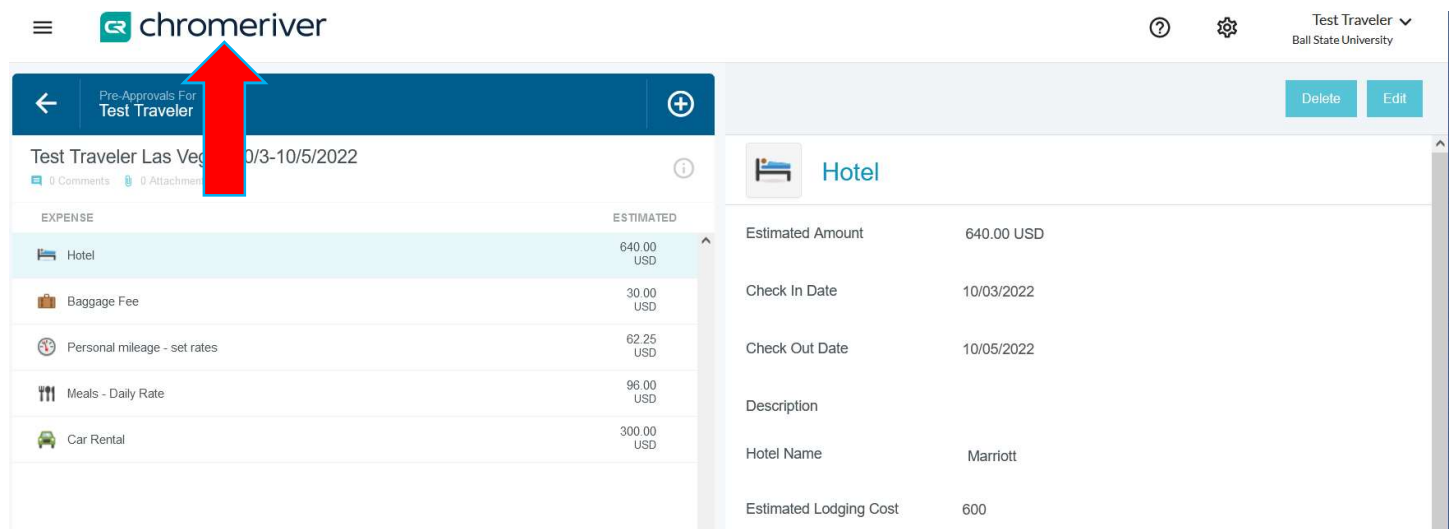
The details panel for the "Hotel" expense shows the following information:

- Estimated Amount: 640.00 USD
- Check In Date: 10/03/2022
- Check Out Date: 10/05/2022
- Description:
- Hotel Name: Marriott
- Estimated Lodging Cost: 600

The expense can then be added as any other expense. Be sure to verify your allocations before attempting to [Submit](#) again. The screen below will appear if the report was submitted successfully:



To track or recall a submitted document, click the [ChromeRiver](#) logo to be taken back to the home screen:



The screenshot shows the Chromeriver interface. At the top, there is a navigation bar with a hamburger menu, the Chromeriver logo, and user information (Test Traveler, Ball State University). Below the navigation bar, there is a header for the report: "Test Traveler Las Vegas 10/3-10/5/2022". A red arrow points to the Chromeriver logo in the top navigation bar. The main content area is divided into two sections. The left section is a table of expenses, and the right section is a details panel for the selected "Hotel" expense.

EXPENSE	ESTIMATED
Hotel	640.00 USD
Baggage Fee	30.00 USD
Personal mileage - set rates	62.25 USD
Meals - Daily Rate	96.00 USD
Car Rental	300.00 USD

The details panel for the "Hotel" expense shows the following information:

- Estimated Amount: 640.00 USD
- Check In Date: 10/03/2022
- Check Out Date: 10/05/2022
- Description:
- Hotel Name: Marriott
- Estimated Lodging Cost: 600

Click **Submitted** in the Pre-Approval section:

The screenshot shows the chromeriver interface. On the left, the 'Pre-Approval' section has a 'Submitted' status with a count of 0, highlighted by a red arrow. The right sidebar displays the Ball State University logo and a section titled 'ANNOUNCEMENTS' with the heading 'EFFECTIVE 7/22/21-PRESENT: University-Sponsored/Funded Travel'. Below this, it states: 'The following standards apply to University-sponsored/funded travel during the ongoing COVID-19 pandemic: 1. **International Travel:** The suspension on University-sponsored/funded international travel, including Study Abroad, has been lifted. Such travel may occur in accordance with the University's regular International Travel Policy and departmental policies and practices. 2. **Domestic Travel:** University-sponsored/funded travel within the United States for faculty, staff, and students is allowable in a manner consistent with standard University and departmental policies and practices.'

From there, click the appropriate report on the left. Click **Tracking** to see whose approval the report is pending, or click **Recall** to remove the document from workflow approvals.

The screenshot shows the chromeriver interface. On the left, the 'Submitted' section lists three reports: 'test' (010001166990, 03/29/2022, 41.51 USD, PENDING), 'Ghost Travel' (010001166504, 03/29/2022, 2,550.00 USD, PENDING), and 'Test traveler training 4/4/22' (010001166417, 03/29/2022, 500.00 USD, PENDING). On the right, the 'Tracking' button is highlighted with a red arrow. The right sidebar shows the Ball State University logo and a section titled 'ANNOUNCEMENTS'.

For tracking, click on the report to see where the report will be routed for approval. You can click the numbers in the document workflow to see all current and future steps. Note that for pre-approvals, only three steps are listed at a time.



+

.51 USD NG

.00 USD NG

.00 USD NG

.25 USD NG

.00 USD NG

.25 USD NG

.25 USD NG

.00

Tracking for test

X

Status Pending Approval

Estimated Amount 41.51 USD

Routing Steps

1

2

3

Step Number 1

Assigned To Test Traveler

Assigned To Test Traveler

Assigned Date 03/29/2022 02:04 PM

Step Status Assigned

Routing Rule 10 - PA: Delegate Submits -> Expense Owner Approves

Pre-Approval Amounts & Routing/Workflow Information

Pre-approval amounts are reduced by any expense reports that have been submitted or approved, but not expense reports in draft status. When the total amount of all submitted or approved expense reports exceeds the pre-approval amount, the pre-approval becomes **used/expired**, and no future expense reports can be submitted against it. This is why the amount displayed for a given pre-approval may be less than what the original amount was submitted for – the amount which appears when reviewing pre-approvals is the remaining balance of that pre-approval.

Click the pre-approval and then scroll down on the right pane to see what the original amount was and what has been applied against it.

Submitted

+

4/16/19 Hotel Lodging Test PA

04/16/2019

70.00 USD

APPROVED

12/11/2018 - Test PA to approve for test ER

12/11/2018

10.00 USD

APPROVED

12/11/2018 Report Testing PA

12/11/2018

25.99 USD

PARTIALLY APPLIED

1/23/19 Testing PA Import Items

0.02 USD

APPROVED

Open

PDF

Tracking

PA Report ID

010000565713

From Date

12/11/2018

To Date

12/11/2018

Testing PA report functionality

Prior Approvers

APPROVER

DATE

Zachariah Mickler

12/11/2018

Expense Summary

	AMOUNT (USD)	SUBMITTED (USD)
Meals - Daily Rate	26.00	0.00
Miscellaneous - Other	0.00	0.01
Total	26.00	0.01

Workflow:

The routing for pre-approval reports is (always approves, approves if applicable):

