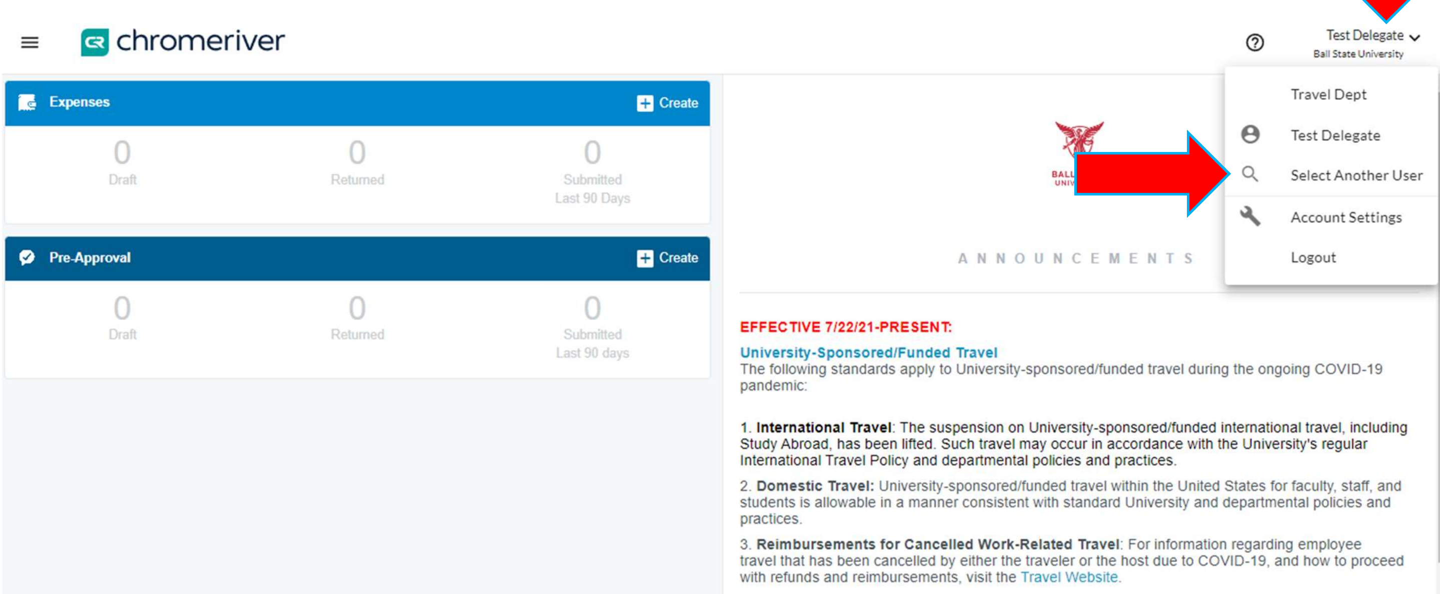
BALL STATE UNIVERSITY

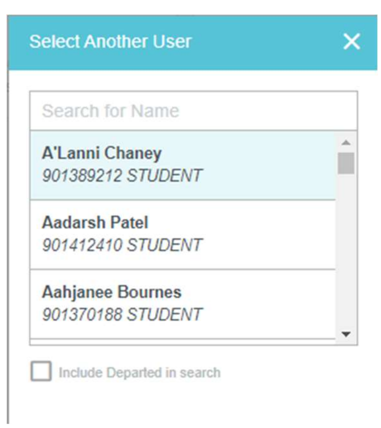
Five Steps to Create and Submit Chrome River Pre-Approvals

STEP 1: Select Your Traveler

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

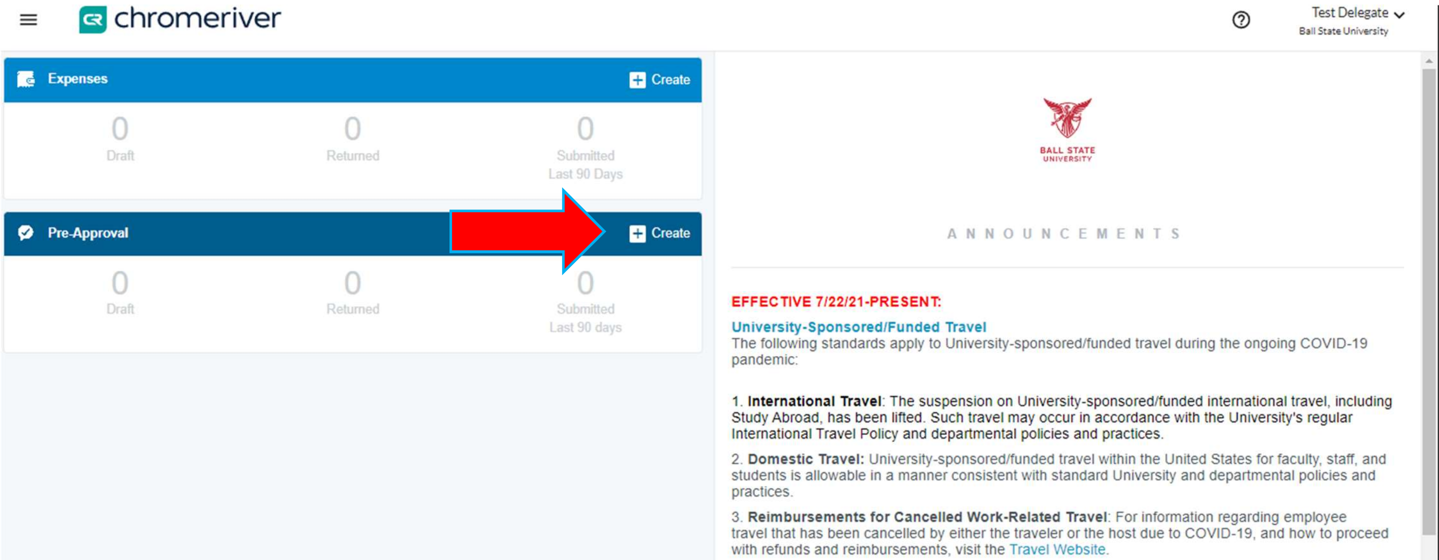


You can then search for your traveler by either the name, Ball State ID#, or Title (note students appear as STUDENT):

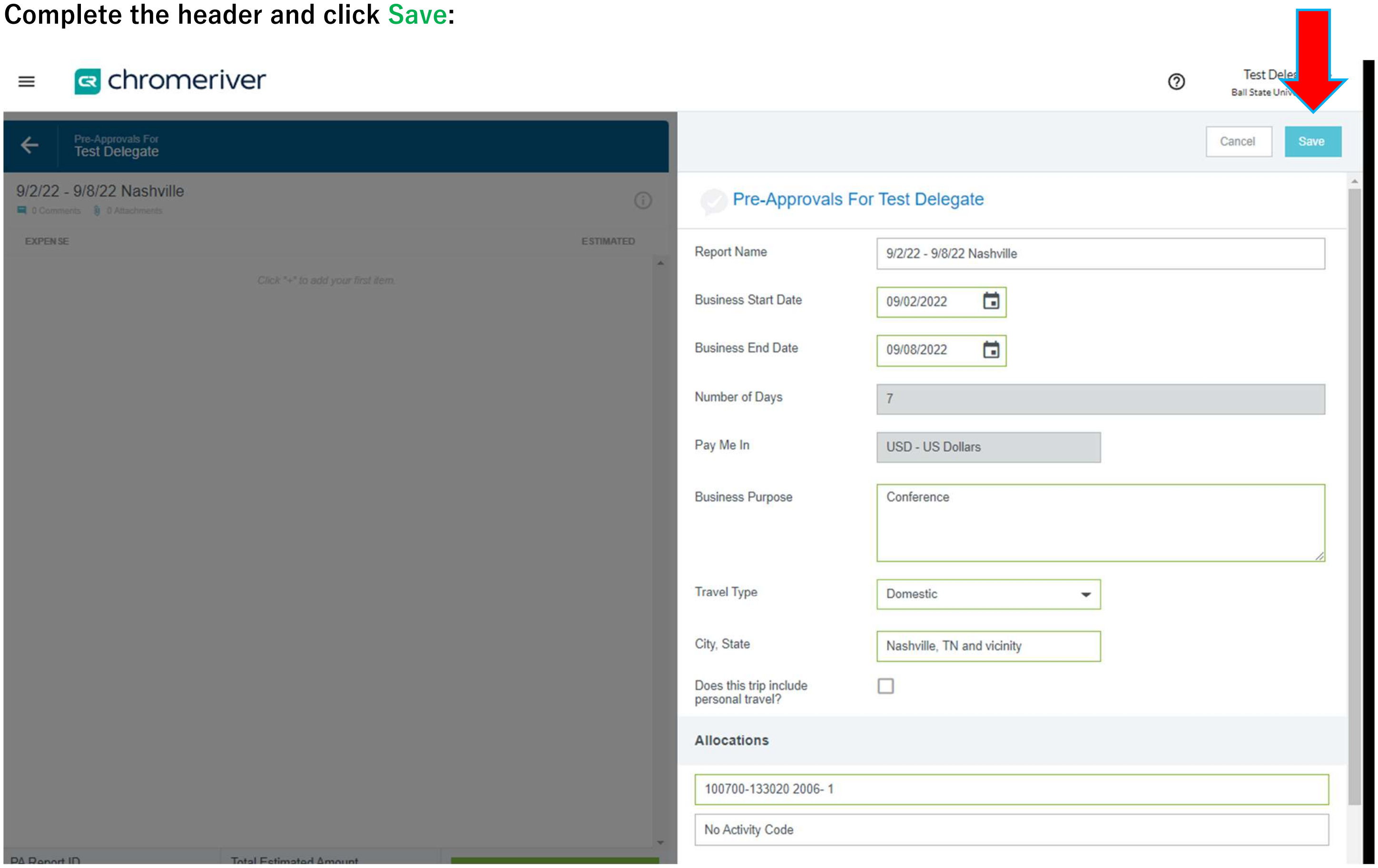


STEP 2: Complete the Header

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



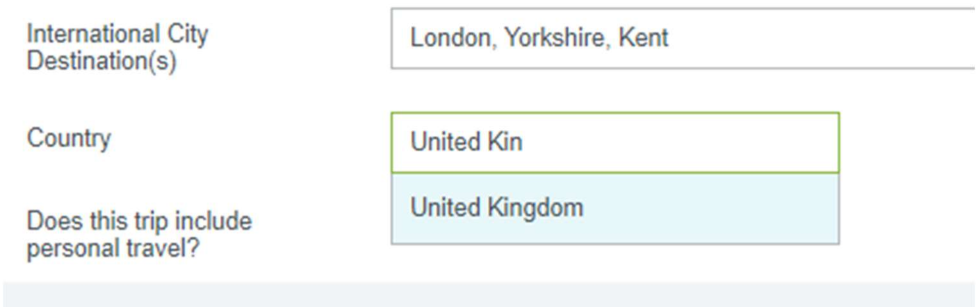
Complete the header and click Save:



- 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.

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



* If the trip includes personal travel, select the Does this trip include personal travel? checkbox and enter the dates of personal travel.
* Choose an intial 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)

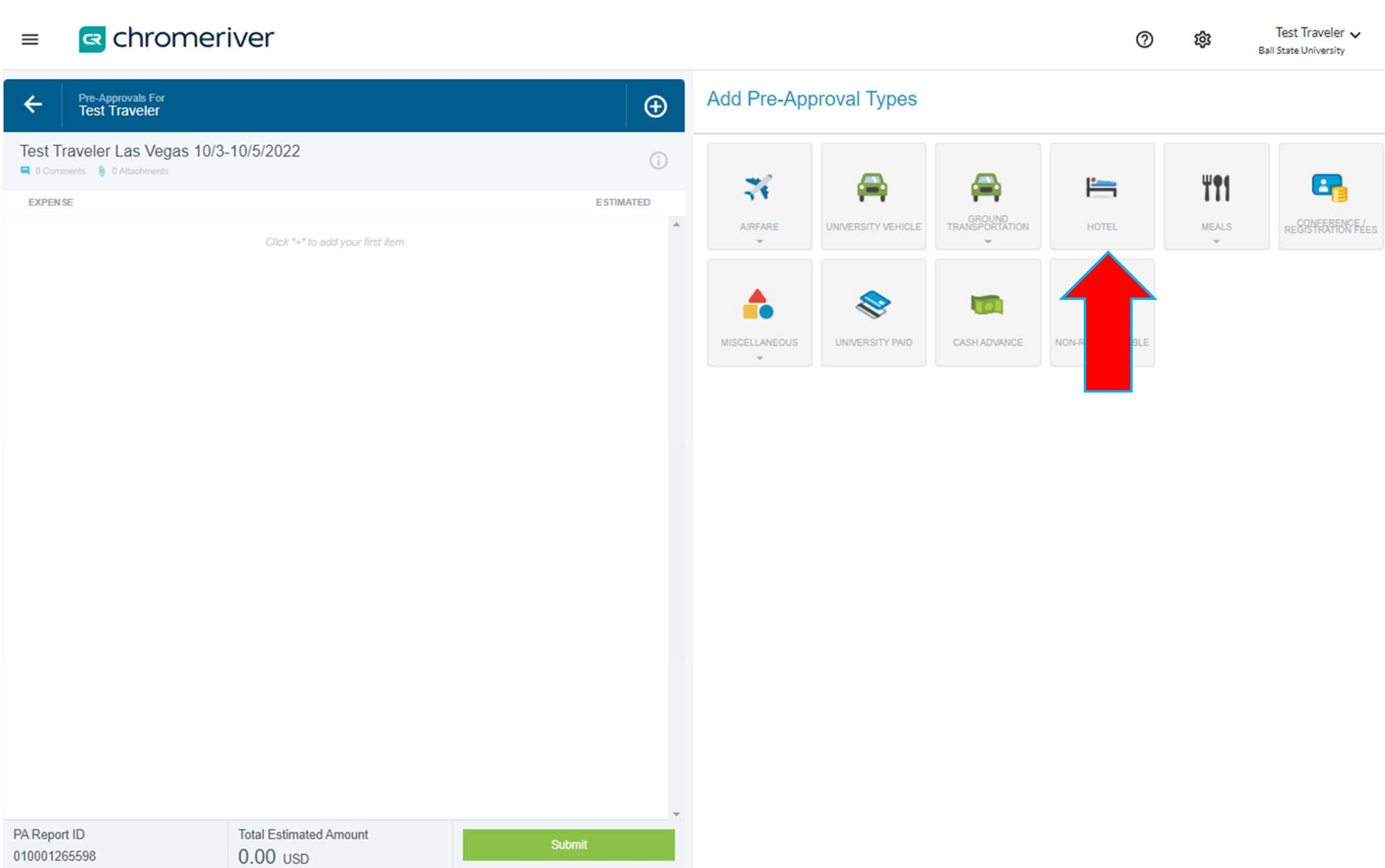
- For conference registrations, choose the University Travel Card payment method (if a departmental purchasing card is not available or other payment method is not available or feasible).
- Use the University Paid expense type if you are requesting the Travel Department to pay for other items, like group 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.

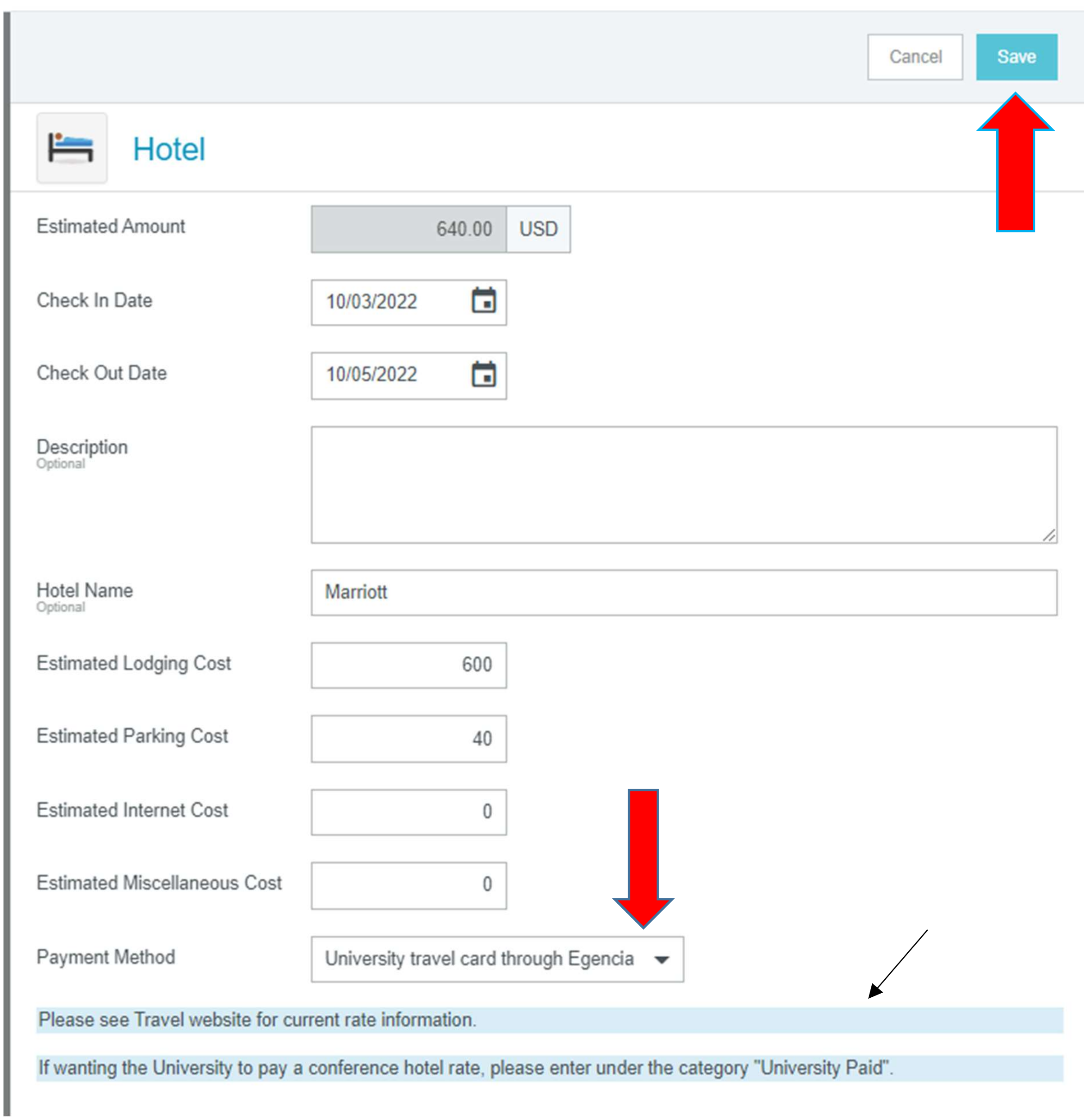
- Use the Non-Reimbursable expense type only to record expenses funded from external sources or expenses for which funding is not currently available. The Non-Reimbursable type should not be used if requesting that the Travel Department pay for airfare, hotel, or rail. - see above for those situations.

Notes regarding form fields:

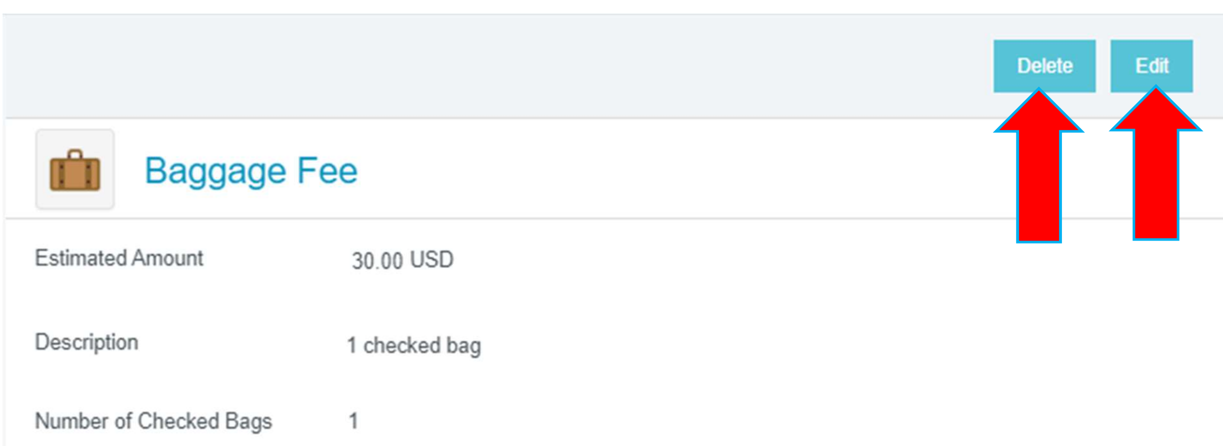
- Date fields should match or be within the date fields on the header
- Certain form fields will include a payment method – if wanting to use Egencia for air, hotel, or rail, or if wanting the University to pay for a conference registration directly, ensure the appropriate University Travel Card payment 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:





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



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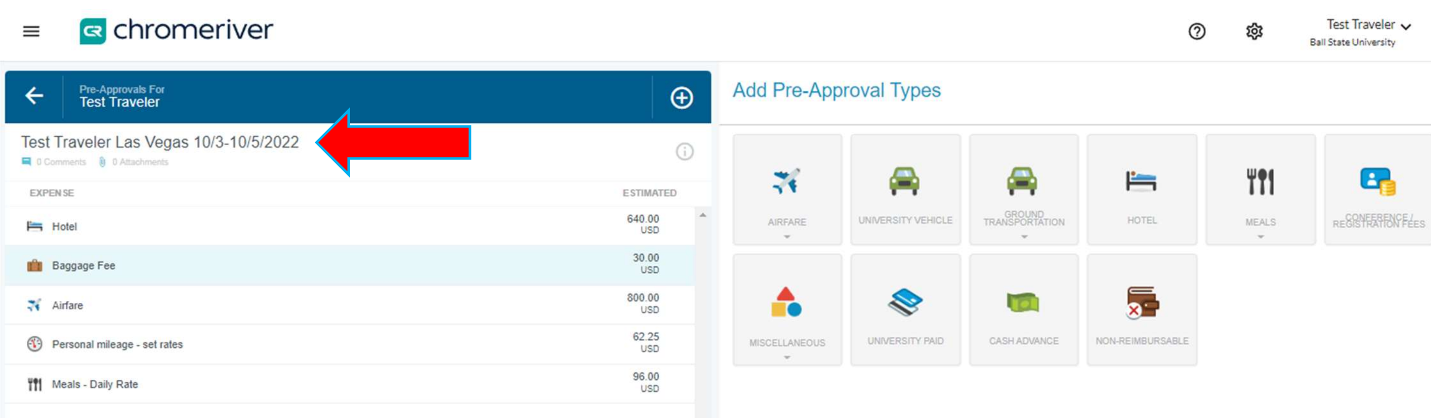
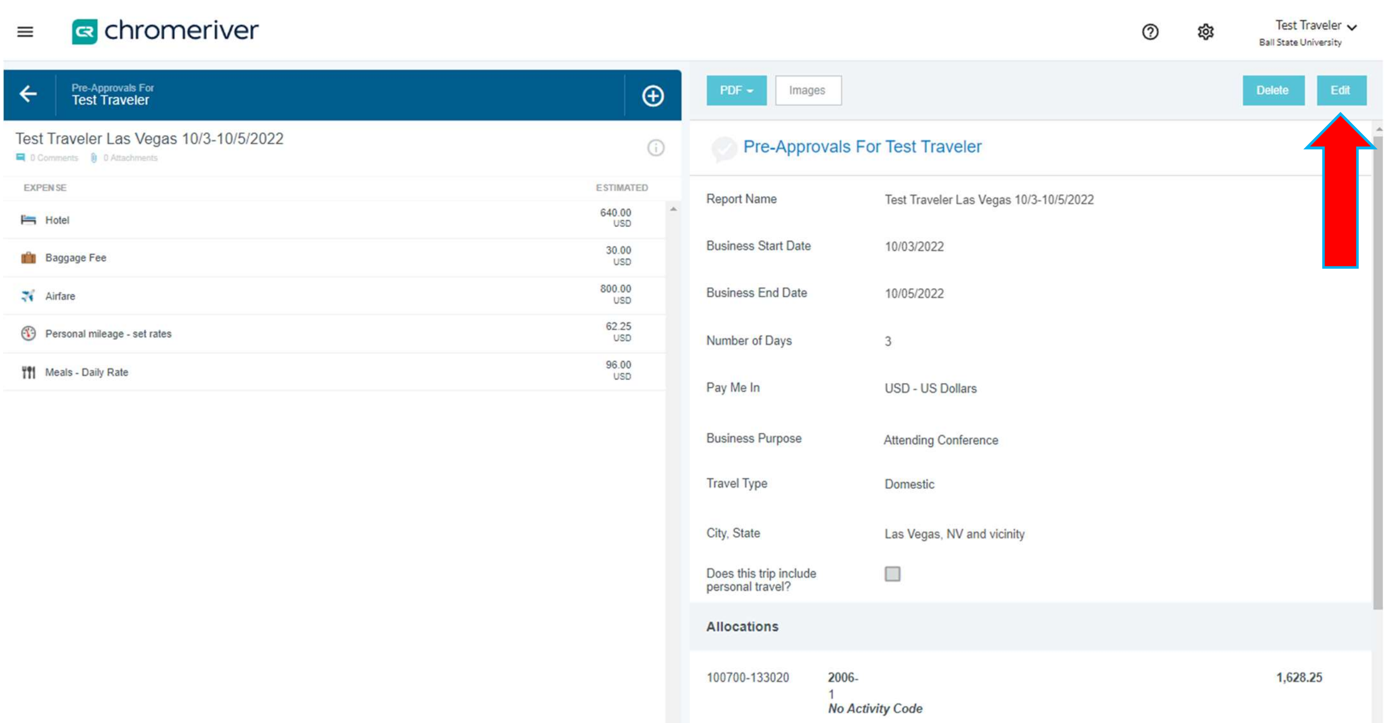
STEP 4: Update Allocation & Add Attachments/Comments

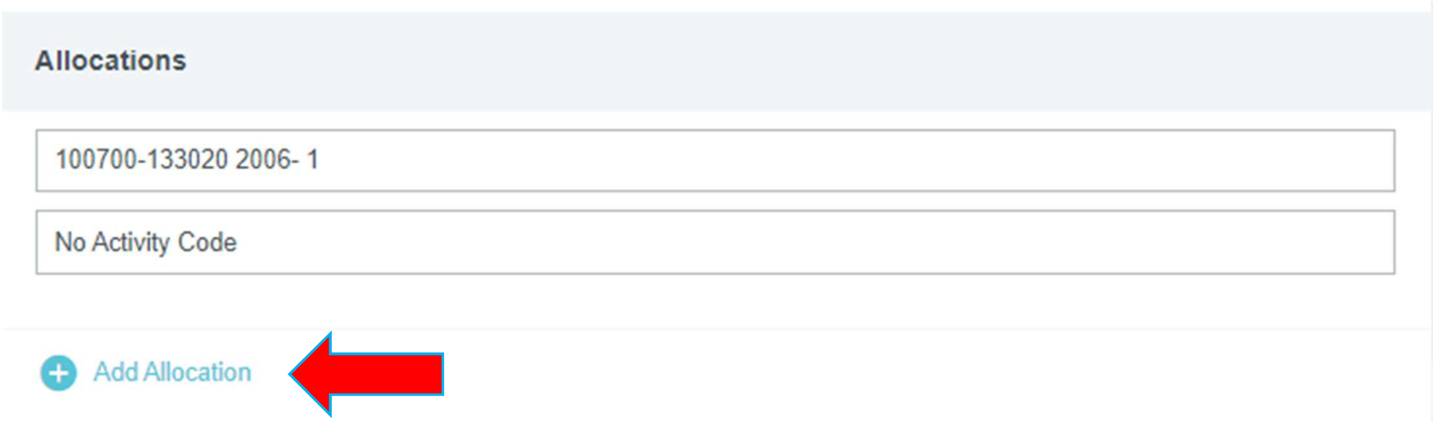
After all expenses have been added, click the Report Description to display the header information again:



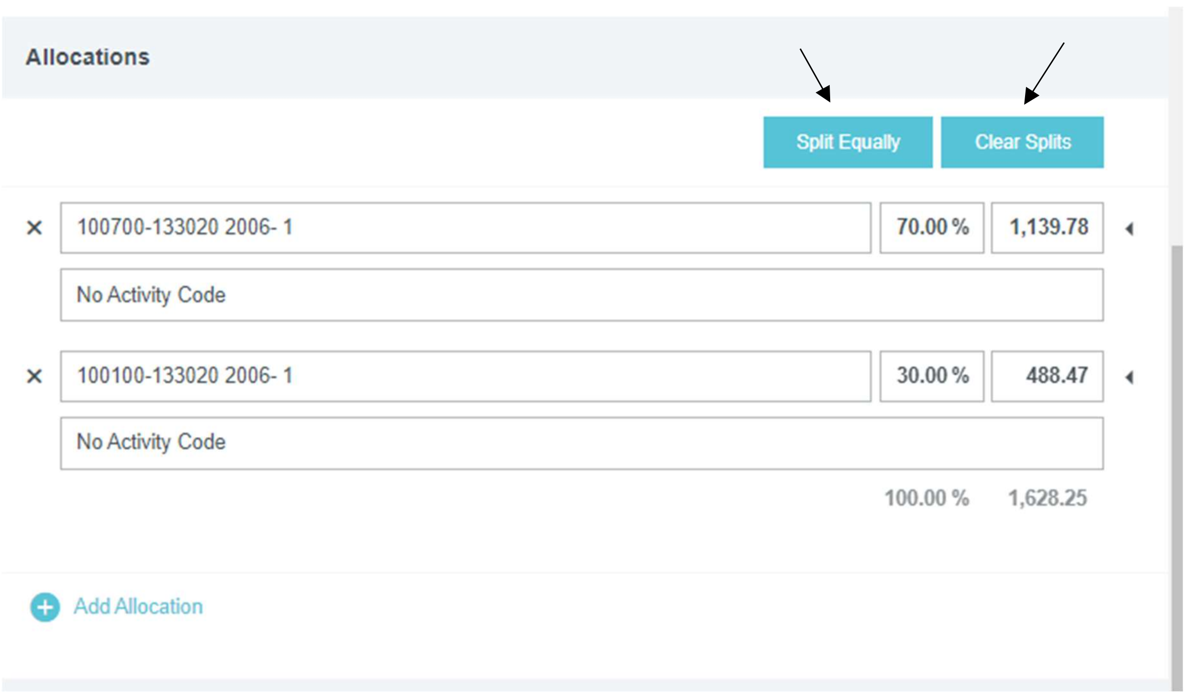
Click Edit:



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



You can split the allocations by percentage or dollar amount.



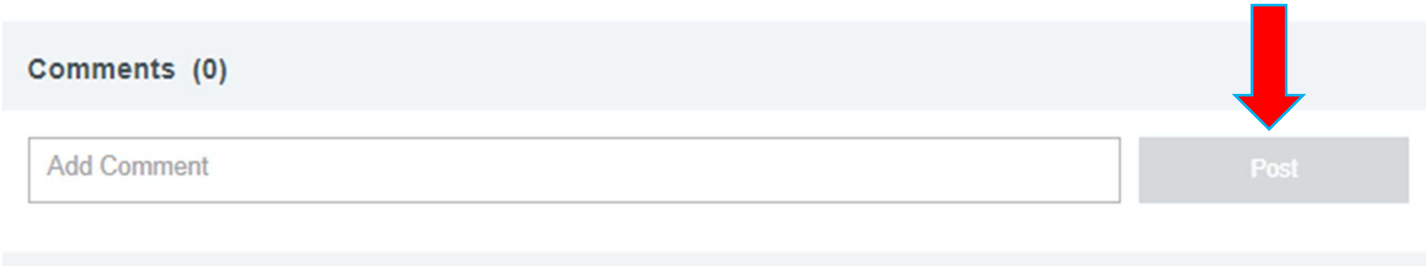
Enter the appropriate FOAPALs and amounts and click Save.

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.

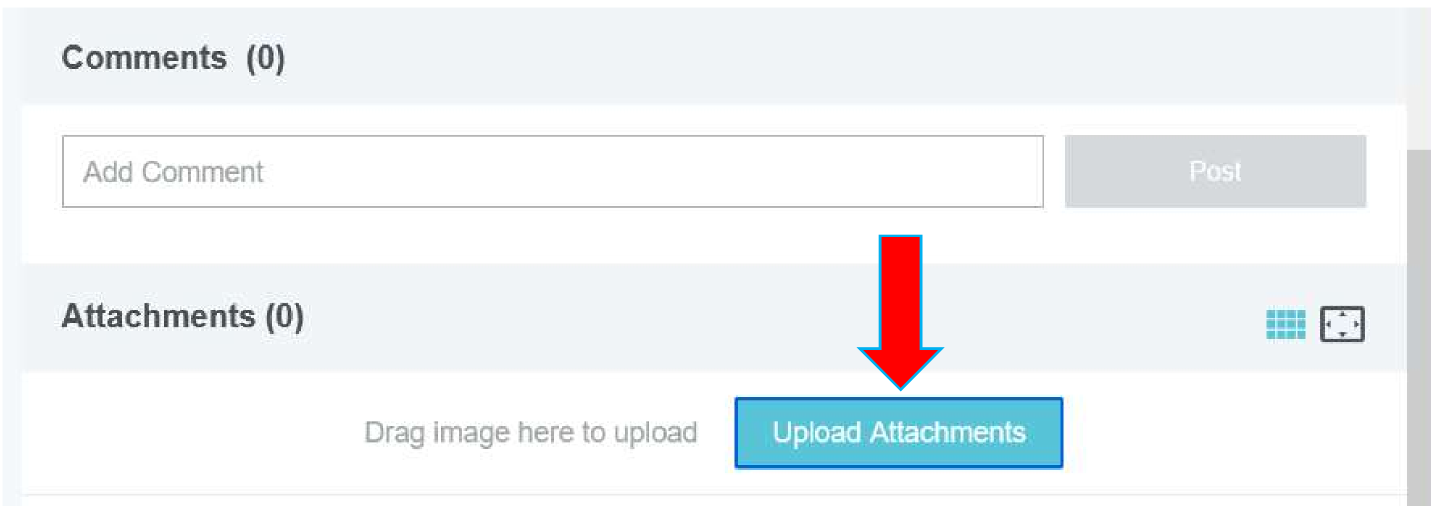
COMMENTS:

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.



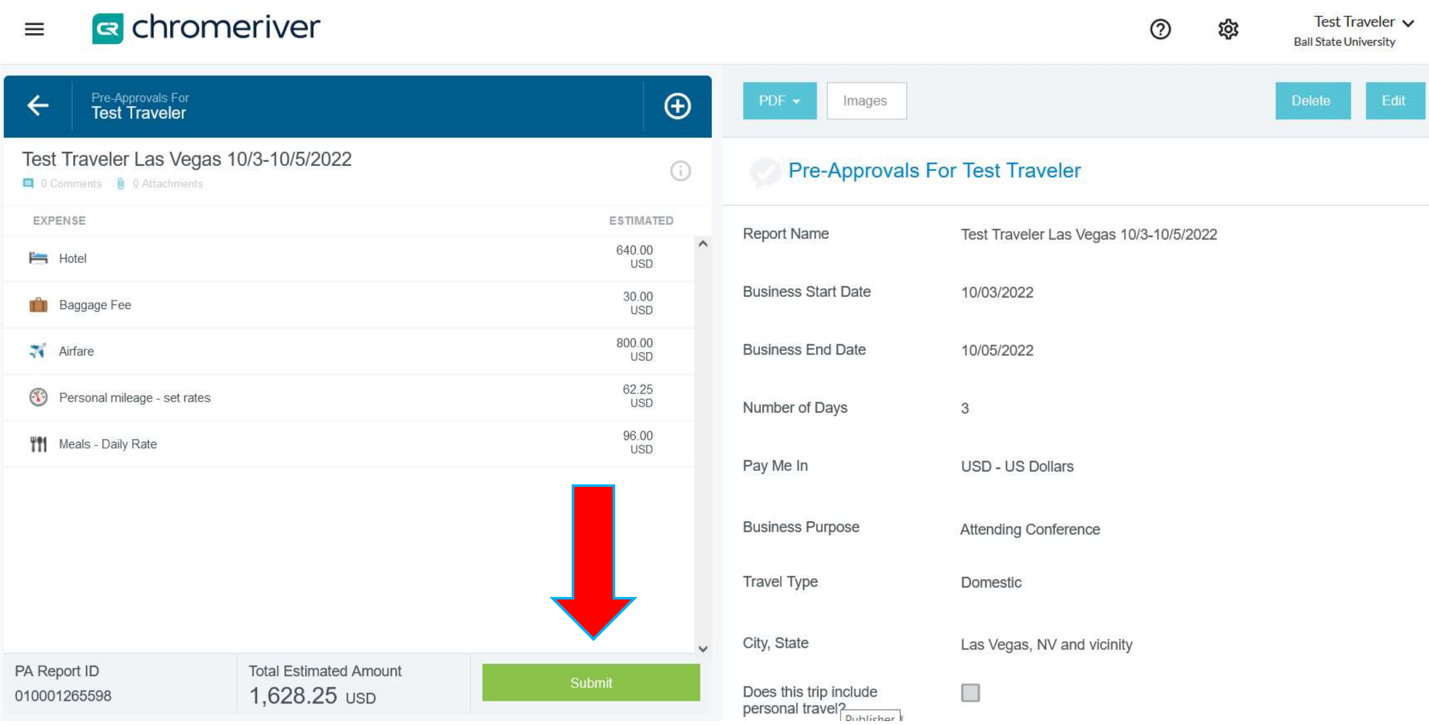
ATTACHMENTS:

To upload, click Upload Attachments and select your documents.

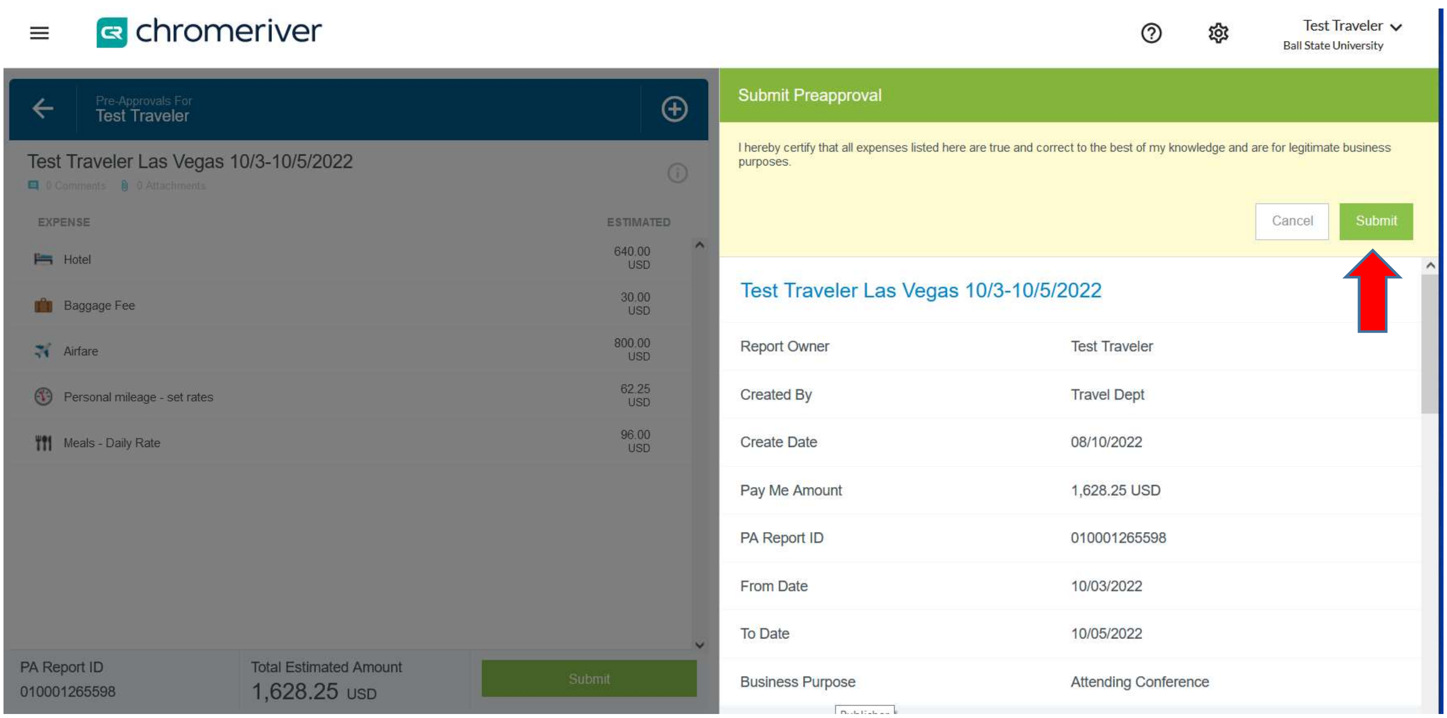


STEP 5: Submit

Click Submit:

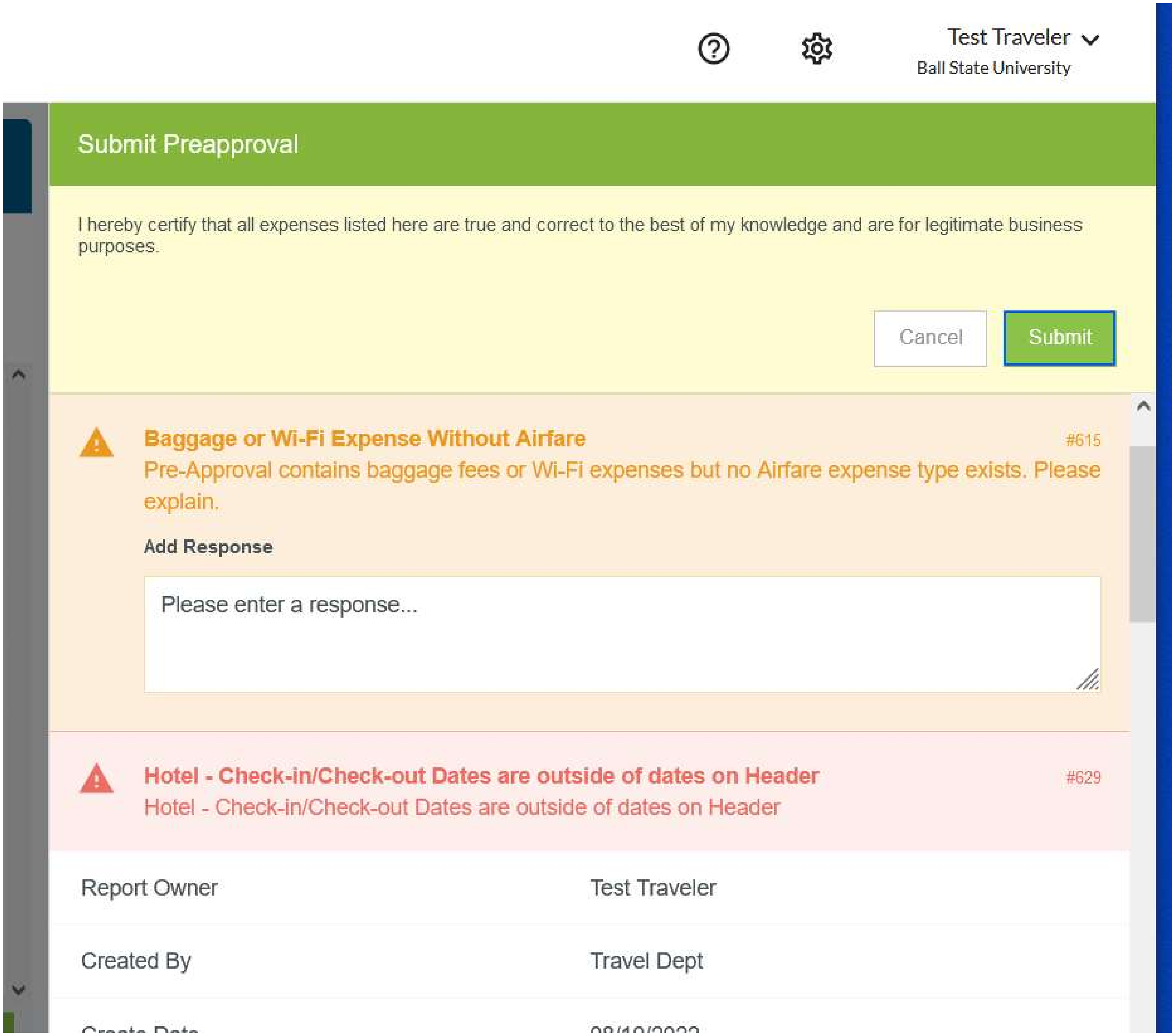


You can then perform a final review of all information on the right-hand side before clicking Submit again:



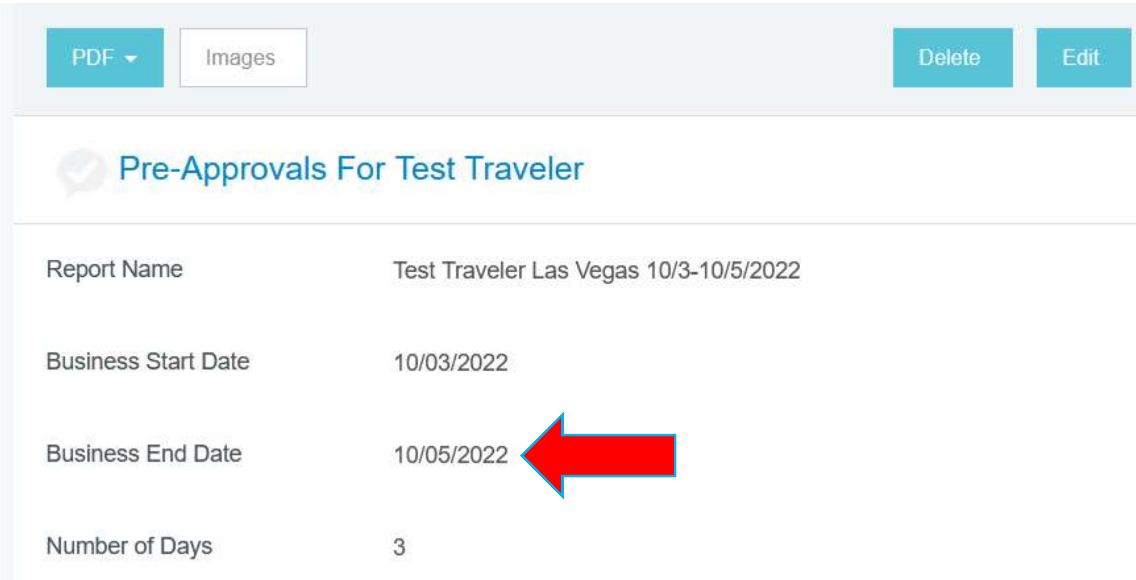
At that point, you may see a compliance warning, violation, or both:

- 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.

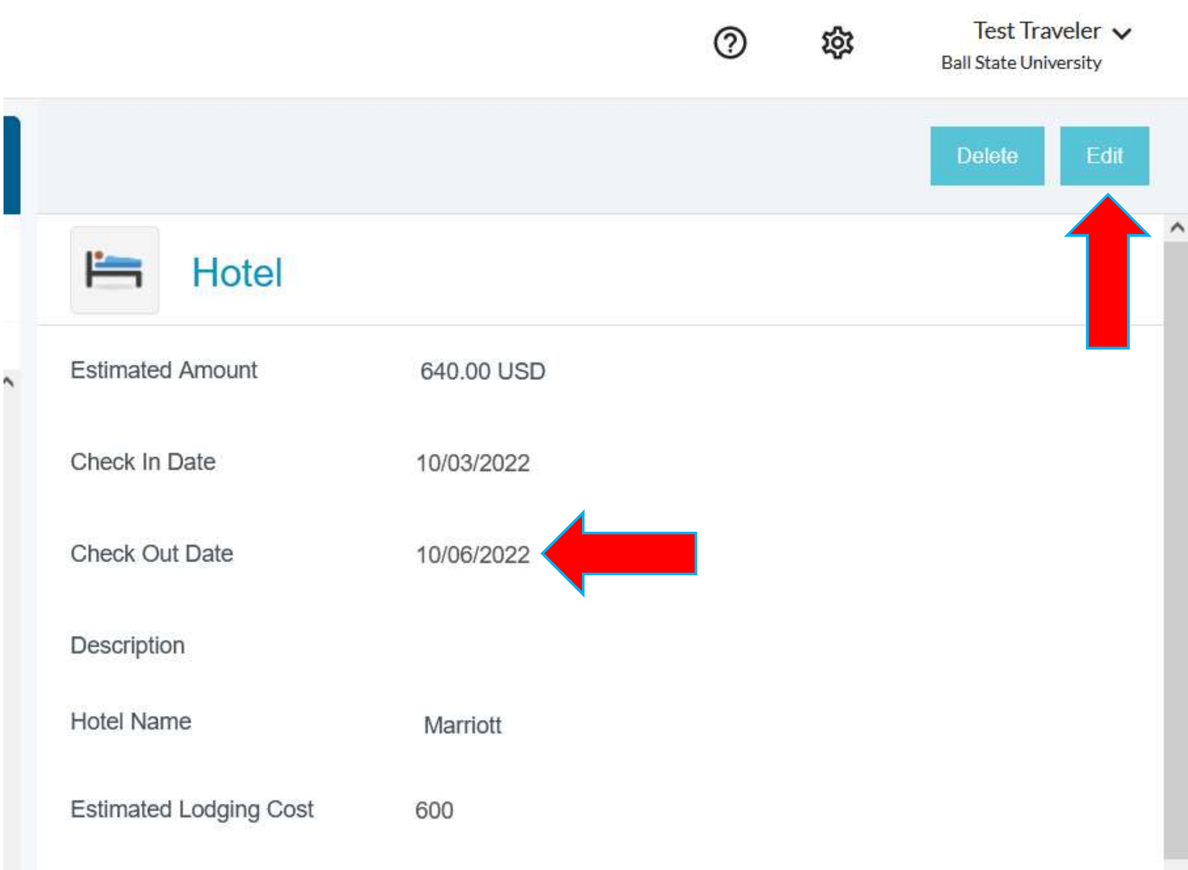


To correct the expense, click Cancel. For the violation above, we can click on the Report Description to see what values were entered at the header. Then we can click the expense type itself, click Edit, make the appropriate adjustments, and click Save:

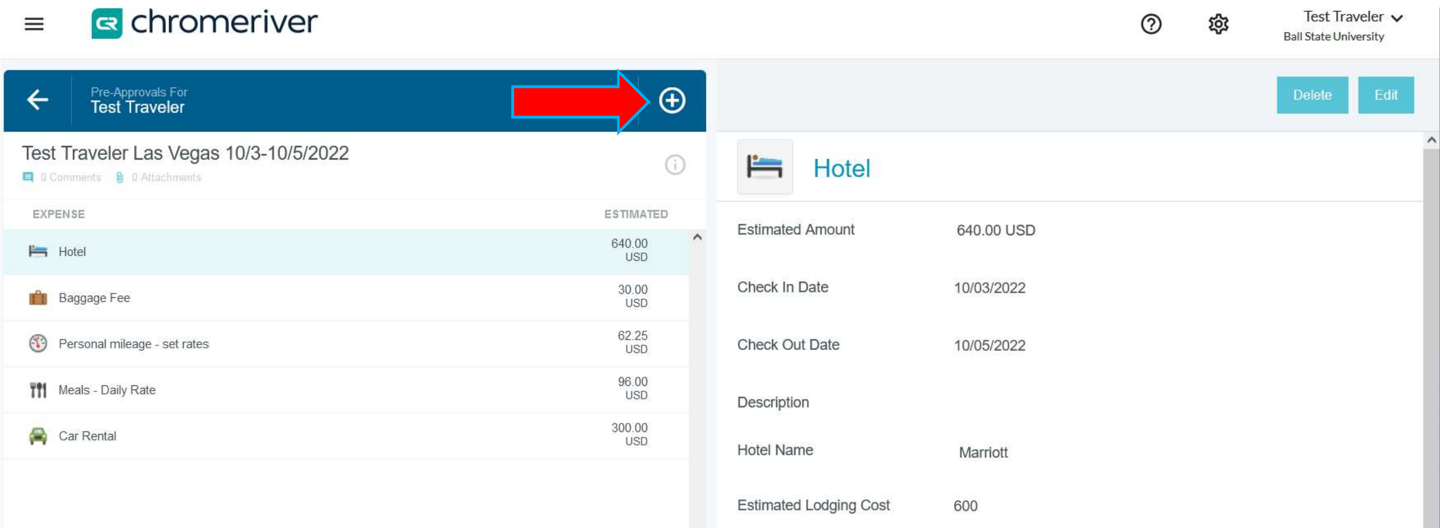
HEADER:



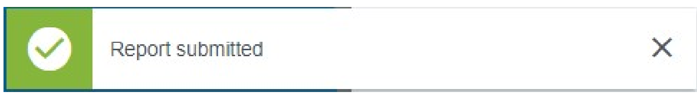
EXPENSE:



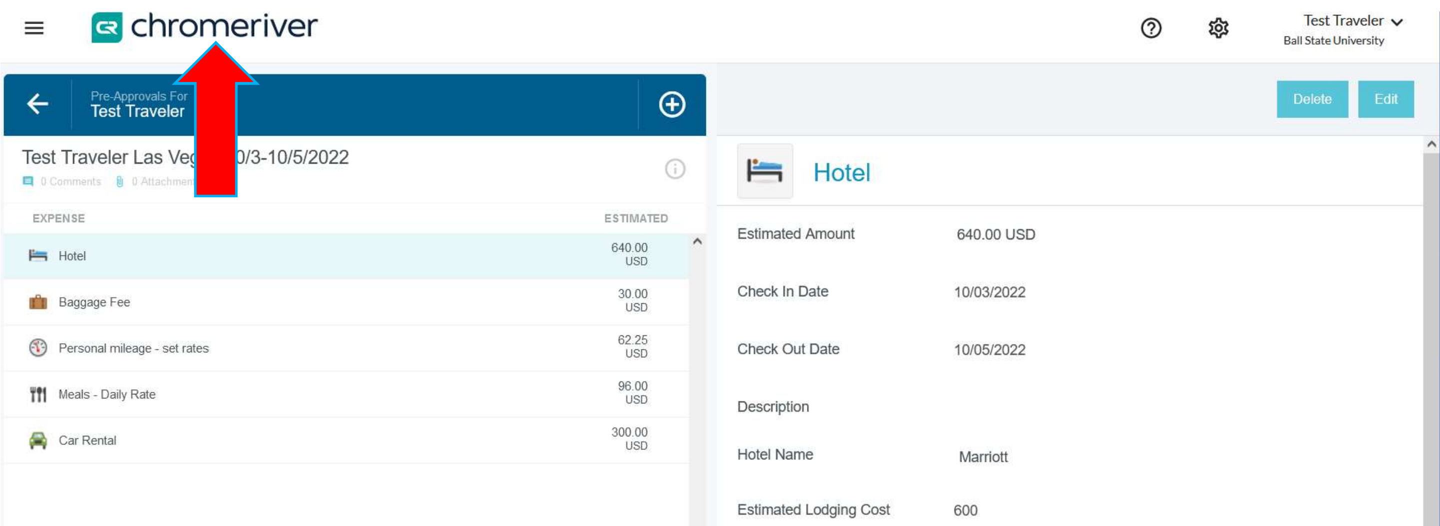
For the warning, we can add the airline expense we forgot to add by clicking the symbol below:



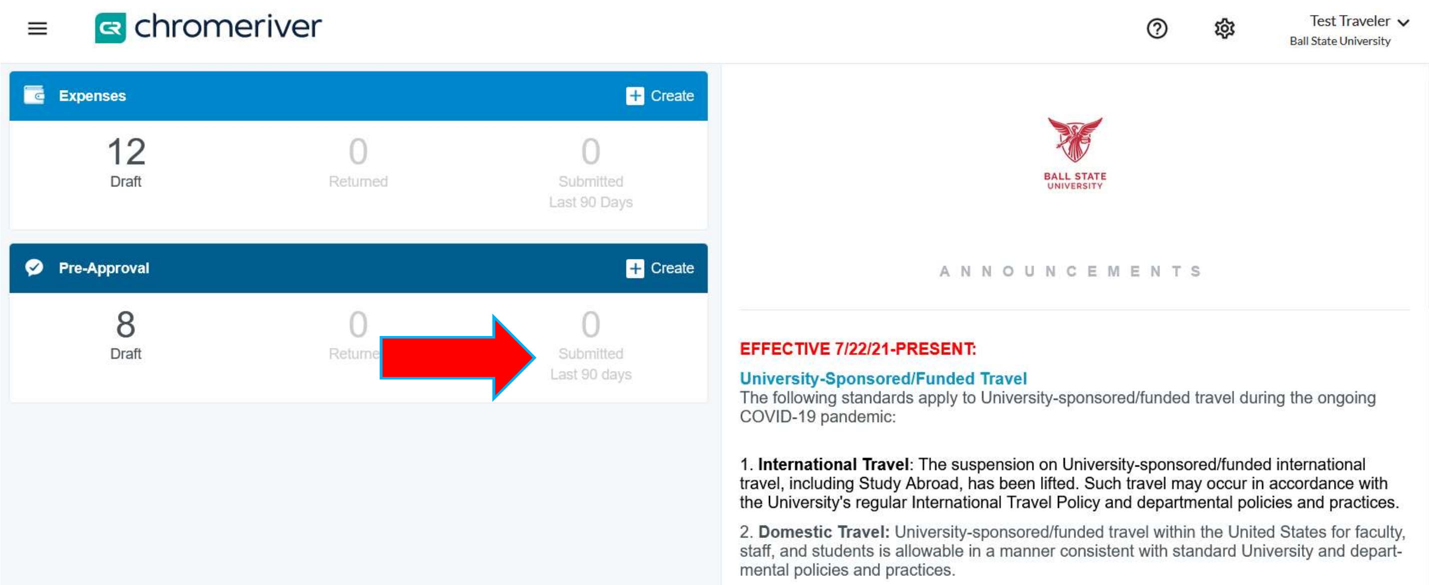
The expense can then be added as any other expense. Be sure to verify your allocations before attempting to Submit again. The screen below will appear if the report was submitted successfully:



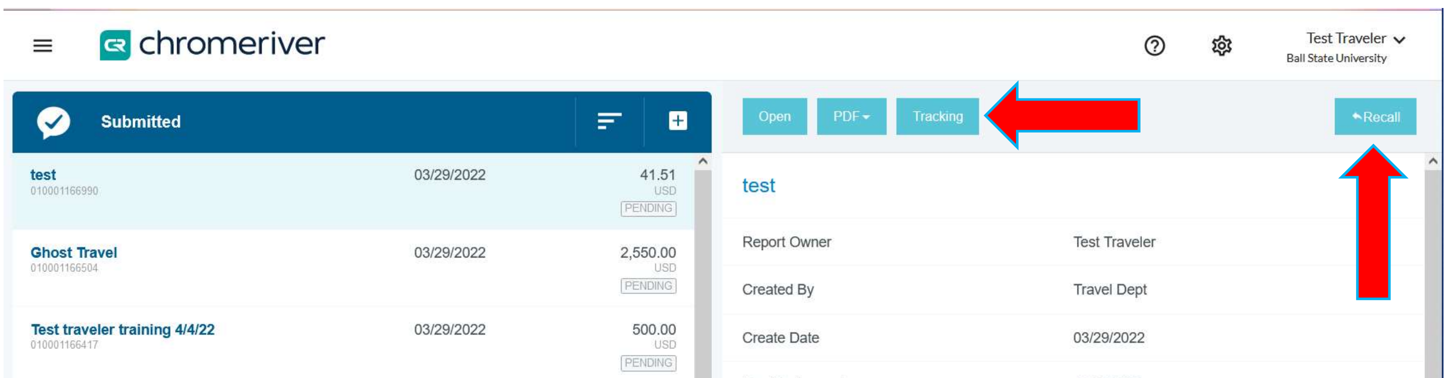
To track or recall a submitted document, click the ChromeRiver logo to be taken back to the home screen:



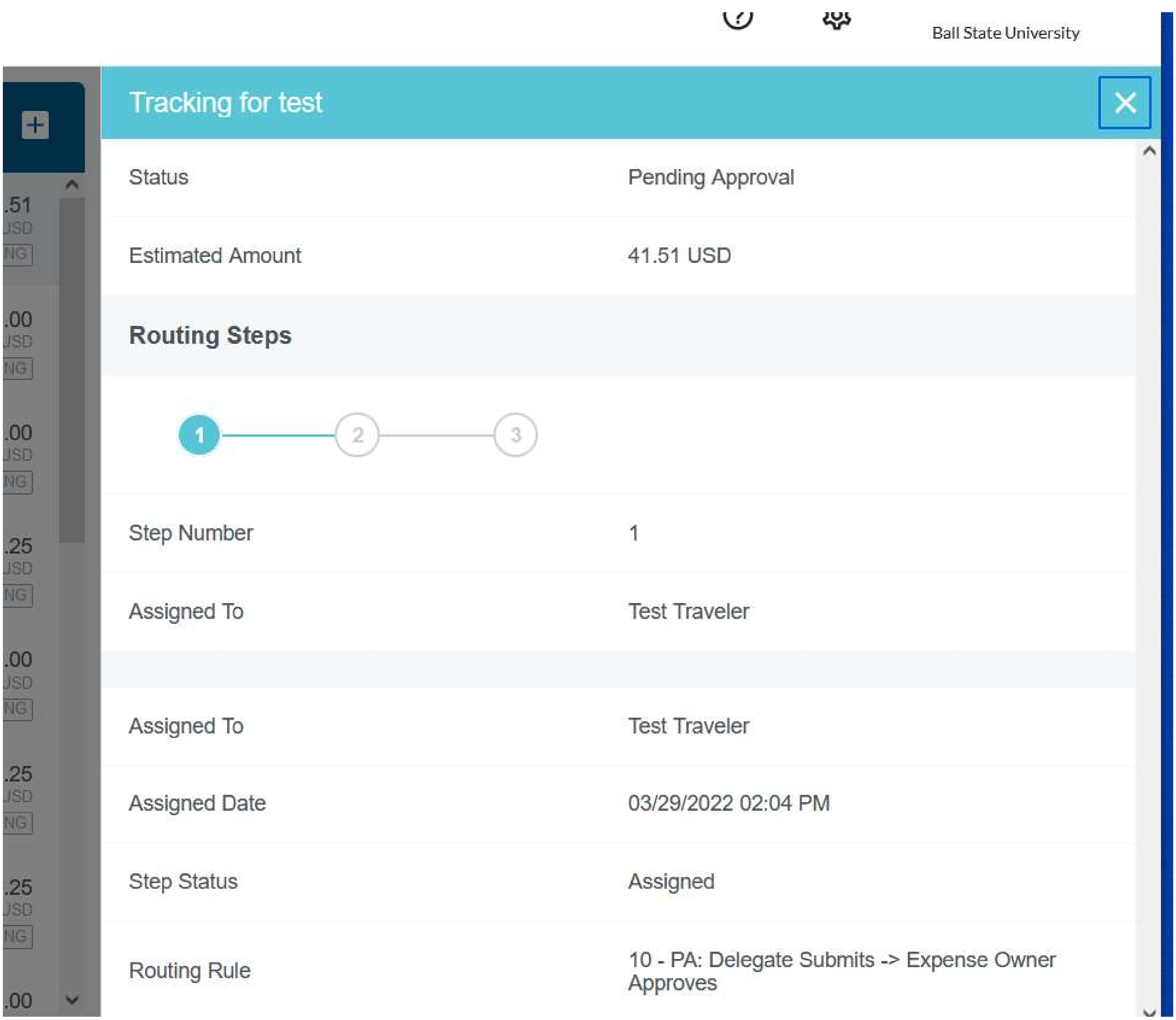
Click Submitted in the Pre-Approval section:



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.



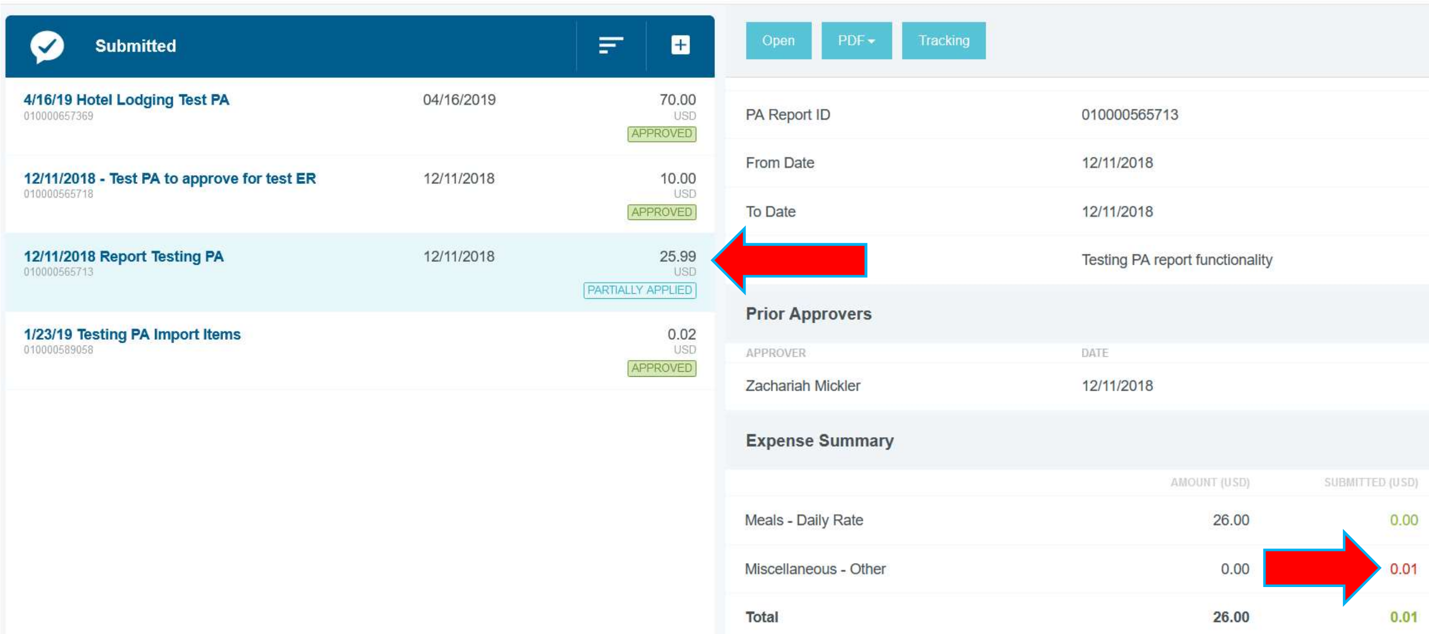
For tracking, click on the report to see where the report will be routed for approval. You can click the numbers in the document workflow to see all current and future steps. Note that for pre-approvals, only three steps are listed at a time.



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.



Workflow:

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