

## CHROME RIVER QUICK GUIDE – APPROVING REPORTS

### Approving via Email

Chrome River will email approvers expense reports requiring their approval. Approvers have the ability to **approve all** expenses or **return all** expenses to the expense owner via email. Approving or returning only specific line items within a report must be done in the application through the link at the bottom of the email. (See next section for more details of approving via the application.)

1. The approver will receive an email summary of the report, including details of each expense line and the ability to view receipts. To view all receipts, click the **View Receipts** link at the bottom of the summary.

**CHROME RIVER**  
Report ID: QA00-2022-5022

**ACTION REQUIRED** Chrome River

Expense Report for **WebstUR Spider [Mascot]**  
 Report Name **Reimbursements - December 2019**  
 Submit Date **01/24/2020**  
 Expense Dates **12/02/2019 - 12/03/2019**  
 Total Expenses **115.53 USD**  
 1-Report Type **Non-Travel Reimbursement or Refund (not to a current student)**  
 2-Business Purpose **Reimbursement for miscellaneous office supplies ordered**  
 3-Payee Type **UR Employee**

Account Summary		Amount (USD)
23456	School Spirit	--
		115.53

Expense Details		Amount (USD)
12/02/2019	Office Supplies	--
		87.22
	23456	School Spirit
Business Purpose	Reimbursement for miscellaneous office supplies ordered	
Reason Assigned	Route to Index Budget Owner	

Financial Summary		Amount (USD)
Total Expense Report		115.53
Less Company Paid		0.00
Amount Due Employee		115.53

ACCEPT
RETURN

[View Receipts](#) ←

Report ID: QA00-2022-5022

To take action on these expenses, take either of the following steps:

- Click on the **ACCEPT** or **RETURN** button as appropriate and add any comments to the new email that opens.
- OR **FORWARD** this email to [approve@expense.ca1.chromeriver.com](mailto:approve@expense.ca1.chromeriver.com) or [return@expense.ca1.chromeriver.com](mailto:return@expense.ca1.chromeriver.com) with any comments at the top of the forwarded message.

To view this expense report or access the Chrome River application, [click here](#)

2. Any compliance issues for line items will be noted with a Compliance Warning flag, as well as an explanation of the compliance issue and a response from the expense owner.

12/03/2019	Postage and Shipping	--	28.31	USD
	23456	School Spirit		
Business Purpose	Reimbursement for miscellaneous office supplies ordered			
Reason Assigned	Route to Index Budget Owner			
<b>!! Compliance Warning !!</b>				
Postage and Shipping	Receipt required for this expense			
Response	I think I lost it. Sorry!			

3. After reviewing all items, if you would like to approve the report, press the green **ACCEPT** button at the bottom of the email.

Financial Summary		Amount (USD)
Total Expense Report		115.53
Less Company Paid		0.00
Amount Due Employee		115.53

ACCEPT
RETURN

This will open a new email window, and you will need to click **Send**. After submitting this email, the report will move forward in the approval queue.

Chrome River Expense Approval [WebstUR Spider] - Message (HTML)

To: [approve@expense.ca1.chromeriver.com](mailto:approve@expense.ca1.chromeriver.com)

Subject: Chrome River Expense Approval [WebstUR Spider]

Enter any optional NOTES in the space above this line to have them added to this expense report, then SEND this message to the Chrome River automated processing system for your action to be completed.

Report ID: 0100-1956-0840 Email UID: 33F84F1B-F867-4238-D03A-D60C7D42CC7

If you would like to return the report, press the red **RETURN** button at the bottom of the email. This will open a new email window where you should enter an explanation of why you are returning the report. Hit **Send** and the report will return to the submitter for corrections.

Chrome River Expense Approval [WebstUR Spider] - Message (HTML)

To: [return@expense.ca1.chromeriver.com](mailto:return@expense.ca1.chromeriver.com)

Subject: Chrome River Expense Approval [WebstUR Spider]

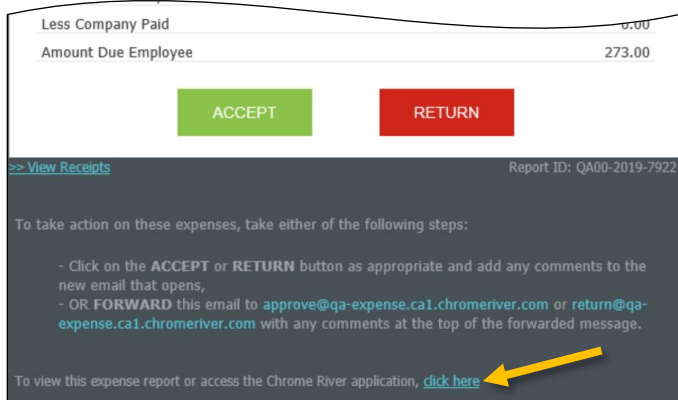
You've already submitted a report for these expenses.

Enter the reason for return NOTES in the space above this line to have them added to this expense report, then SEND this message to the Chrome River automated processing system for your action to be completed.

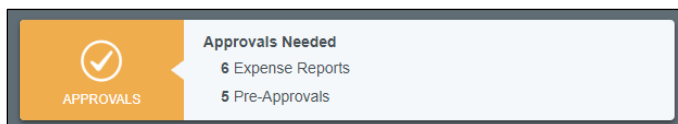
Report ID: 0100-1956-0840 Email UID: 33F84F1B-F867-4238-D03A-D60C7D42CC7

## Approving in Chrome River Application

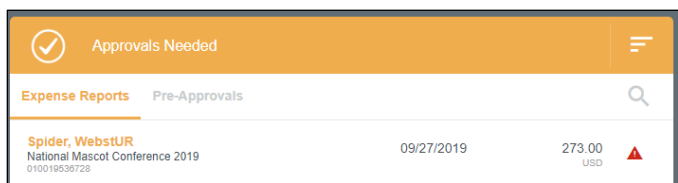
1. Log in to Chrome River or follow the link at the bottom of the approval email.



2. Any reports awaiting approval will be noted in the Approvals box on your Dashboard. Click on **Expense Reports** or **Pre-Approvals** to access the list of reports awaiting approval.



3. From the Approval List, select the report to review. Note that any reports submitted with compliance warnings will be noted with a red triangle icon on the line of the report.

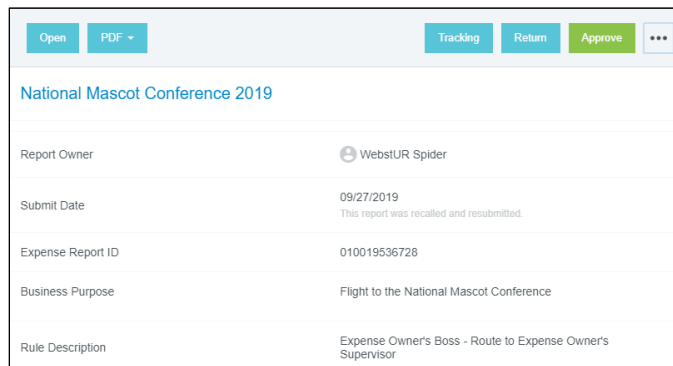


4. Click on the report to review, and the report header will display in the window to the right, including a summary of expenses, funding sources, and all attached receipts.

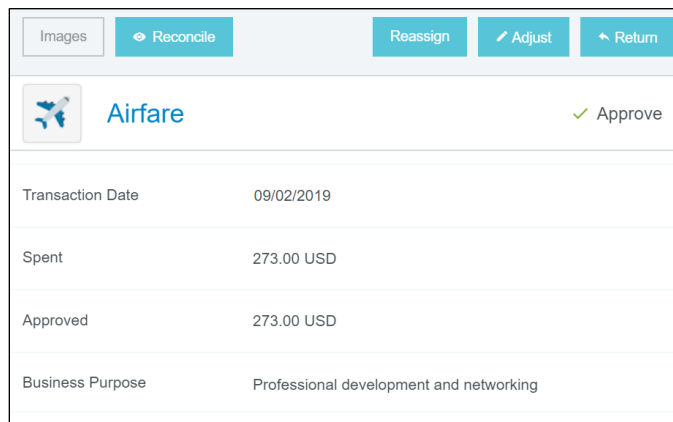
From the report preview, you can perform the following functions via the buttons at the top of the preview:

- **Open** – Opens the full report
- **PDF** – Provides options for printing the report to PDF

- **Tracking** – Provides summary of the tracking of the report items
- **Return** – Returns the report to the submitter
- **Approve** – Approves the full report
- **Reassign** – Clicking on ●●● will display option to reassign the report to another approver. Generally, this functionality should not be used. If you believe you received a report to approve in error, please contact [Accounts Payable](#).



5. We encourage approvers to **Open** the full report to review all individual expenses. To view details of an expense, click on the expense in the summary on the left and the details will display on the right, including any receipts.



Similar to reports, approvers can perform several functions on individual expenses via the buttons at the top of the expense:

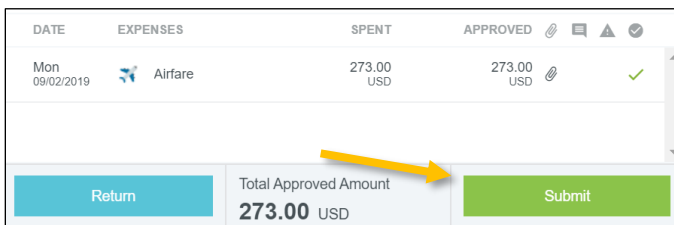
- **Reassign** – While an approver can reassign an expense, this functionality should generally not be used. If you believe you have received a report to approve in error, please contact Accounts Payable
- **Adjust** – Adjust the approved amount (approvers can only adjust this down), business

purpose, Index (Allocation), or add a comment or attachment

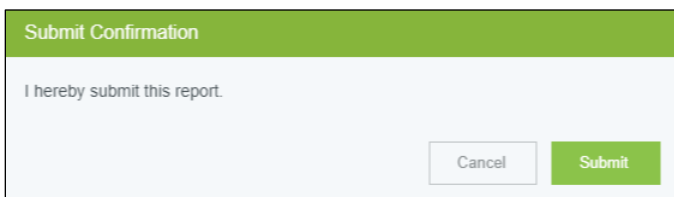
- **Return** – Return an expense to the submitter

Note: The functions above will not occur until the approver hits the **Submit** button on the report, as described below.

6. After you have reviewed the report, made any applicable adjustments, and are ready to move the report forward, click the **Submit** button at the bottom of the expense report summary.



The submit confirmation screen will now appear. Again, click **Submit**.



A submit confirmation will be displayed. All approved expenses will move forward in the approval queue. Any reassigned or returned expenses will route accordingly.