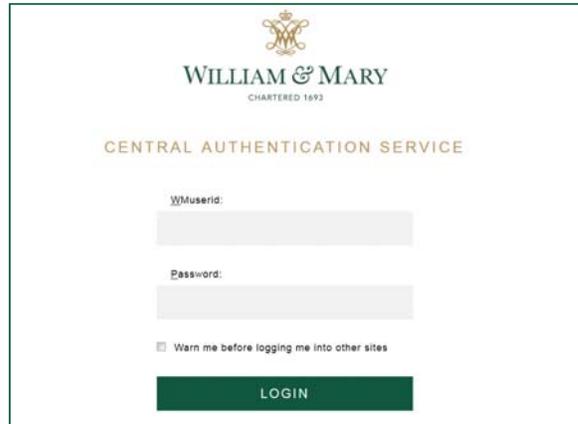


# Pre-Approval Basics

1. Go to [W&M] Chrome River website: **chromeriver.wm.edu**
2. Log in using your W&M network credentials



WILLIAM & MARY  
CHARTERED 1693

CENTRAL AUTHENTICATION SERVICE

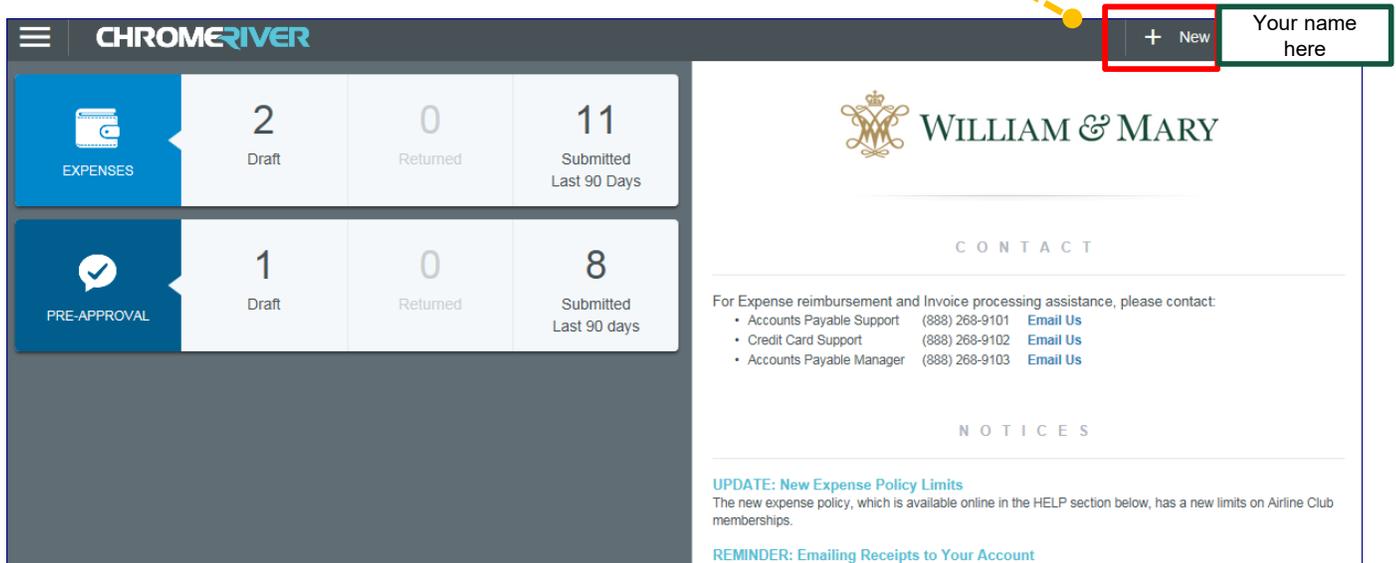
WUserid:

Password:

Warn me before logging me into other sites

LOGIN

3. On the Dashboard page, click on the +New Icon



CHROMERIVER

+ New Your name here

EXPENSES	2 Draft	0 Returned	11 Submitted Last 90 Days
PRE-APPROVAL	1 Draft	0 Returned	8 Submitted Last 90 days

WILLIAM & MARY

CONTACT

For Expense reimbursement and Invoice processing assistance, please contact:

- Accounts Payable Support (888) 268-9101 [Email Us](#)
- Credit Card Support (888) 268-9102 [Email Us](#)
- Accounts Payable Manager (888) 268-9103 [Email Us](#)

NOTICES

**UPDATE: New Expense Policy Limits**  
The new expense policy, which is available online in the HELP section below, has a new limits on Airline Club memberships.

**REMINDER: Emailing Receipts to Your Account**

# Completing the Pre-Approval Header

4. Click on the New Pre-Approval Report link.

The screenshot shows a software interface with a dark header bar. On the right side of the header, there is a red-bordered box containing the text "Your name here". Below the header, a "New" menu is open, displaying two options: "New Expense Report" and "New Pre-Approval Report". A green arrow points to the "New Pre-Approval Report" option with the text "Click here". Below the menu, the word "CONTACT" is centered. Underneath, there is a section titled "For Expense reimbursement and Invoice processing assistance, please contact:" followed by a list of support contacts:

- Accounts Payable Support (888) 268-9101 [Email Us](#)
- Credit Card Support (888) 268-9102 [Email Us](#)
- Accounts Payable Manager (888) 268-9103 [Email Us](#)

# Pre-Approval Header

5. Complete all fields. Notice the Start and End Dates default to today's date. Remember to update the dates for the actual dates of travel.

Report Name	<input style="width: 80%;" type="text"/>
Start Date	<input style="width: 80%;" type="text" value="04/17/2017"/> <input type="button" value="📅"/>
End Date	<input style="width: 80%;" type="text" value="04/17/2017"/> <input type="button" value="📅"/>
Number of Days	<input style="width: 80%;" type="text" value="1"/>
Pay Me In	<input style="width: 80%;" type="text" value="USD - US Doll..."/>
Business Purpose	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> <p style="font-size: 8px; color: #c00000;">Required</p>
Report Type	<div style="border: 1px solid #ccc; padding: 2px;"><span style="float: left;">-- Select --</span><span style="float: right;">▼</span></div> <p style="font-size: 8px; color: #c00000;">Please select the report type.</p>
Student/Non-WM Affiliate <small>Optional</small>	
Travel Purpose	<div style="border: 1px solid #ccc; padding: 2px;"><span style="float: left;">-- Select --</span><span style="float: right;">▼</span></div> <p style="font-size: 8px; color: #c00000;">Please select the reason for travel.</p>
Reason <small>Optional</small>	<input style="width: 80%;" type="text"/>
Travel Type	<div style="border: 1px solid #ccc; padding: 2px;"><span style="float: left;">-- Select --</span><span style="float: right;">▼</span></div> <p style="font-size: 8px; color: #c00000;">Please select a travel type.</p>
Travel to more than one location?	<div style="border: 1px solid #ccc; padding: 2px;"><span style="float: left;">-- Select --</span><span style="float: right;">▼</span></div> <p style="font-size: 8px; color: #c00000;">Please denote if you traveled to more than one location.</p>
Country 1	<div style="border: 1px solid #ccc; padding: 2px;"><span style="float: left;">-- Select --</span><span style="float: right;">▼</span></div> <p style="font-size: 8px; color: #c00000;">Please select the country.</p>
State 1	<div style="border: 1px solid #ccc; padding: 2px;"><span style="float: left;">-- Select --</span><span style="float: right;">▼</span></div> <p style="font-size: 8px; color: #c00000;">Please select the state.</p>

# Header Drop Down Menus

6. Some fields in the Pre-Approval Header are free form others you have to choose from a drop down menu. Choose the choice that best match your travel situation. Let's review the choices for each field.

The diagram illustrates four drop-down menus for travel-related fields. Each menu is shown with its options, and a callout box points to the menus with the text "Select the correct choice for your travel".

- Report Type**
  - Select --
  - Employee
  - Student
  - Non-WM Affiliate
- Travel Purpose**
  - Select --
  - Athletics
  - Conference/Training
  - Conference/Training - IT
  - Fieldwork
  - Meeting (not conference or training)
  - Outreach Activity
  - Presentation
  - Recruitment
  - Research
  - Student Programs
  - Other - Require explanation
  - Business Meal
- Travel Type**
  - Select --
  - Domestic
  - International
- Travel to more than one location**
  - Select --
  - Yes
  - No

Select the correct choice for your travel

# Review of Completed Pre-Approval Header

7. Once all fields are completed you must click save

Cancel Save

Pre-Approvals Your Name Save and Continue

Report Name Nacubo Conference in Las Vegas NV

Start Date 05/15/2017

End Date 05/19/2017

Number of Days 5

Pay Me In USD - US Doll...

Business Purpose To attend annual Tax Conference

Report Type Employee

Student/Non-WM Affiliate Optional

Travel Purpose Conference/Training

Reason Optional

Travel Type Domestic

Travel to more than one location? No

Country 1 United States

State 1 Nevada

City 1 Las Vegas

Allocations

W120168 - General Accounting Office

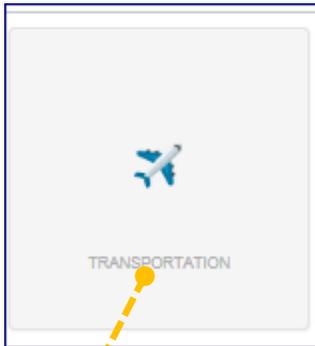
# Add Pre-Approvals Expenditures

8. In this next section you will add the Estimated Expenses of Travel. Click on each icon below to enter the amount for each expense.

Example 1:

Add Pre-Approval Types

 TRANSPORTATION	 LODGING	 ALTERNATE LODGING	 MEALS	 OTHER
---	--	--	--	--



Complete the Amount. Description is Optional

 Transportation		Cancel	Save
Estimated Amount	<input type="text" value="0.00"/> <input type="button" value="USD"/>		
Description <small>Optional</small>	<input type="text"/>		

Save and Continue

# Add Pre-Approvals Expenditures

Example 2:

Add Pre-Approval Types

 TRANSPORTATION	 LODGING	 ALTERNATE LODGING	 MEALS	 OTHER
---	--	--	--	--

  
LODGING

**Complete the Amount, Number of Nights and Nightly Per Diem. Description is Optional**

 Lodging		Cancel Save
Estimated Amount	<input type="text" value="0.00"/> <input type="text" value="USD"/>	
Description Optional	<input type="text"/>	
Number of Nights	<input type="text" value="0"/>	
Nightly Per Diem	<input type="text" value="0"/>	

**Save and Continue**

# Submit Confirmation

9. Complete in the same matter as any other expenses you need to disclose in the Pre-Approval.

EXPENSE	ESTIMATED
Transportation	1,200.00 USD
Lodging	832.00 USD
Meals	200.00 USD

PA Report ID 010000257976	Total Estimated Amount 2,232.00 USD	Submit
------------------------------	--	--------

Once you have completed your Pre-Approval Expenses  
– Click Submit

# Employee Certification

10. Please read employee certification and click Submit. This is your last action.

The Pre-Approval will now go through the Routing Process.

**Submit Confirmation**

I hereby certify that the expenses listed represent a true statement of actual travel expenses incurred in accordance with all applicable College of William and Mary (CWM) Policy and Procedures. All expenses listed are for legitimate business purposes and in support of the CWM mission and goals.

**Nacubo Conference in Las Vegas NV**

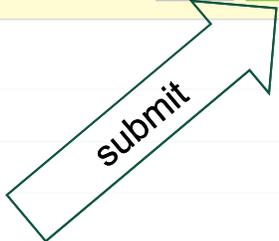
Report Owner	<input type="text" value="Your name here"/>
Created By	<input type="text" value="Your name here"/>
Create Date	04/17/2017
Pay Me Amount	2,232.00 USD
PA Report ID	010000257976
From Date	05/15/2017
To Date	05/19/2017
Business Purpose	To attend annual Tax Conference

**Expense Summary**

	AMOUNT (USD)	SUBMITTED (USD)
Lodging	832.00	0.00
Transportation	1,200.00	0.00
Meals	200.00	0.00
<b>Total</b>	<b>2,232.00</b>	<b>0.00</b>

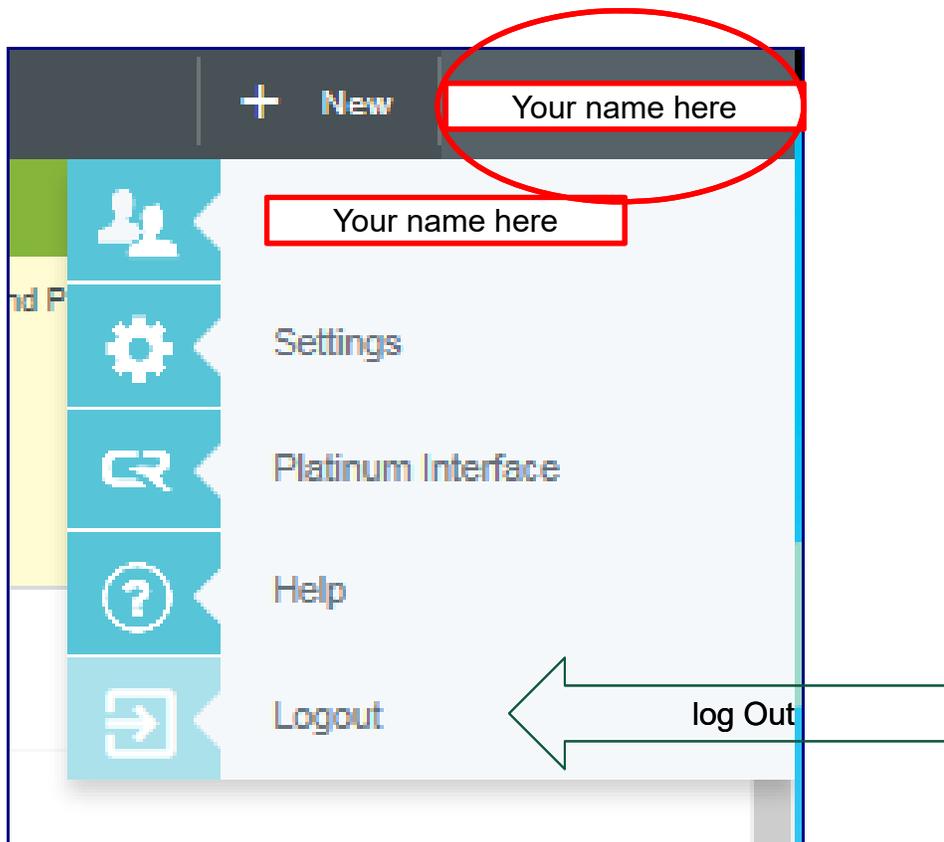
**Account Summary**

	AMOUNT (USD)
W120168 - General Accounting Office Team Travel Event 01	2,232.00
<b>Total</b>	<b>2,232.00</b>



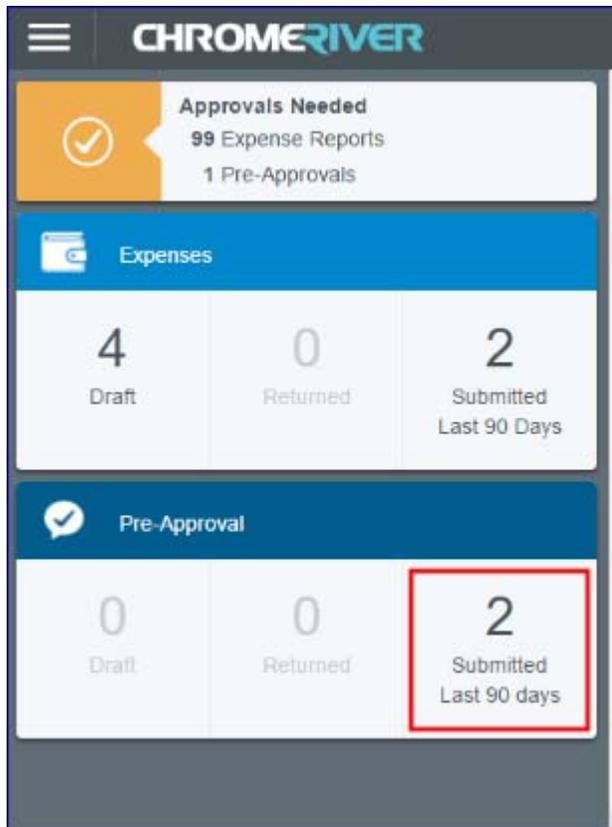
# Logout of Chrome River

11. Locate your name in the upper right hand corner of the screen. Click on it to find the Log Out link. **Click on Log Out.**

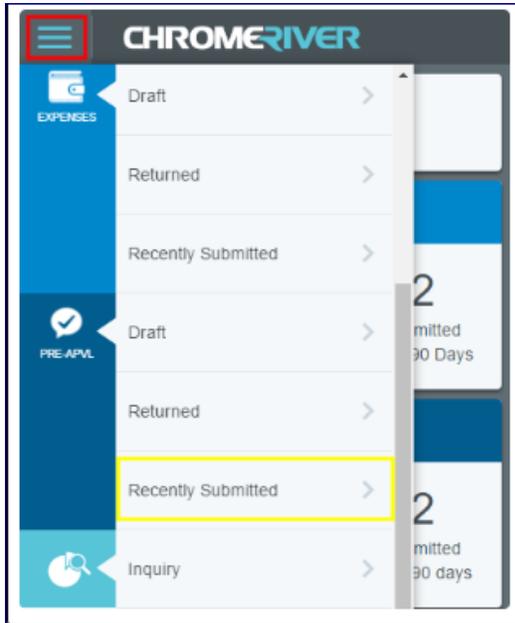


# Track Pre-Approval

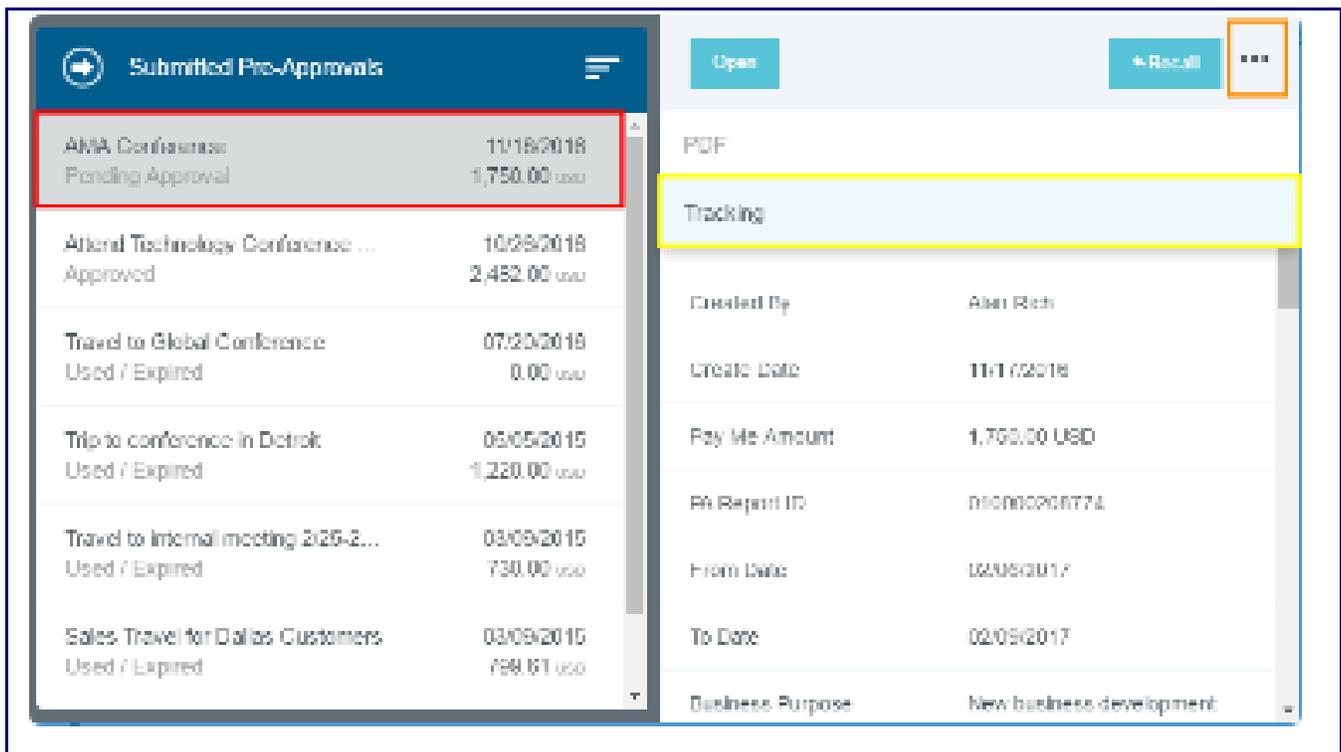
1. To track your submitted pre-approval request, tap on **SUBMITTED LAST 90 DAYS** in the Pre-Approval Section of the Dashboard.



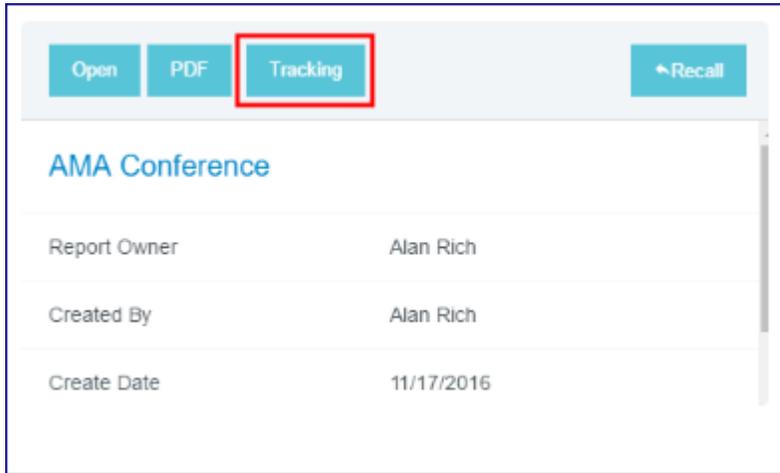
2. To access your submitted pre-approvals from anywhere else in the interface, tap the MENU button and then tap **RECENTLY SUBMITTED** in the Pre-Approval section of the drop-down menu.



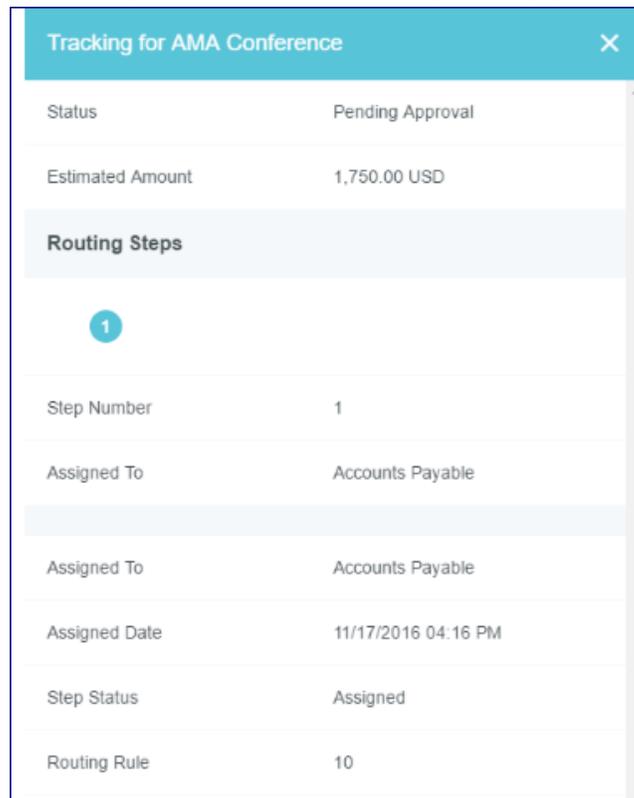
3. Find the pre-approval in the list and tap it to display the preview. Then tap the three-dots icon and select **TRACKING** in the drop-down list.



4. On wide-screen devices, there will be a TRACKING button instead of the three dots.



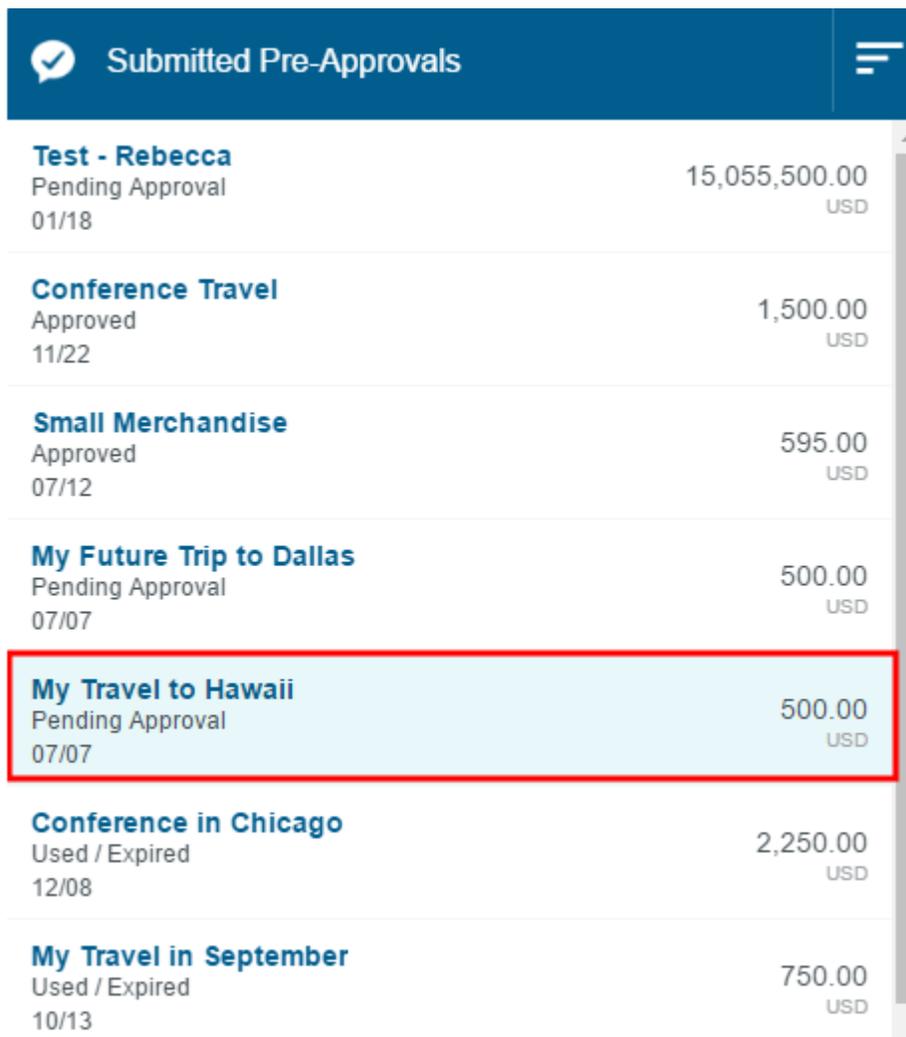
5. You may track the pre-approval request's progress on the Tracking screen, including who it has been assigned to, the applicable routing rules, and status at each step. If multiple routing step numbers are displayed, you may tap each one to see all the details for that step. Tap the X in the upper right-hand corner to return to the preview for that pre-approval.



# Recall Pre-Approval

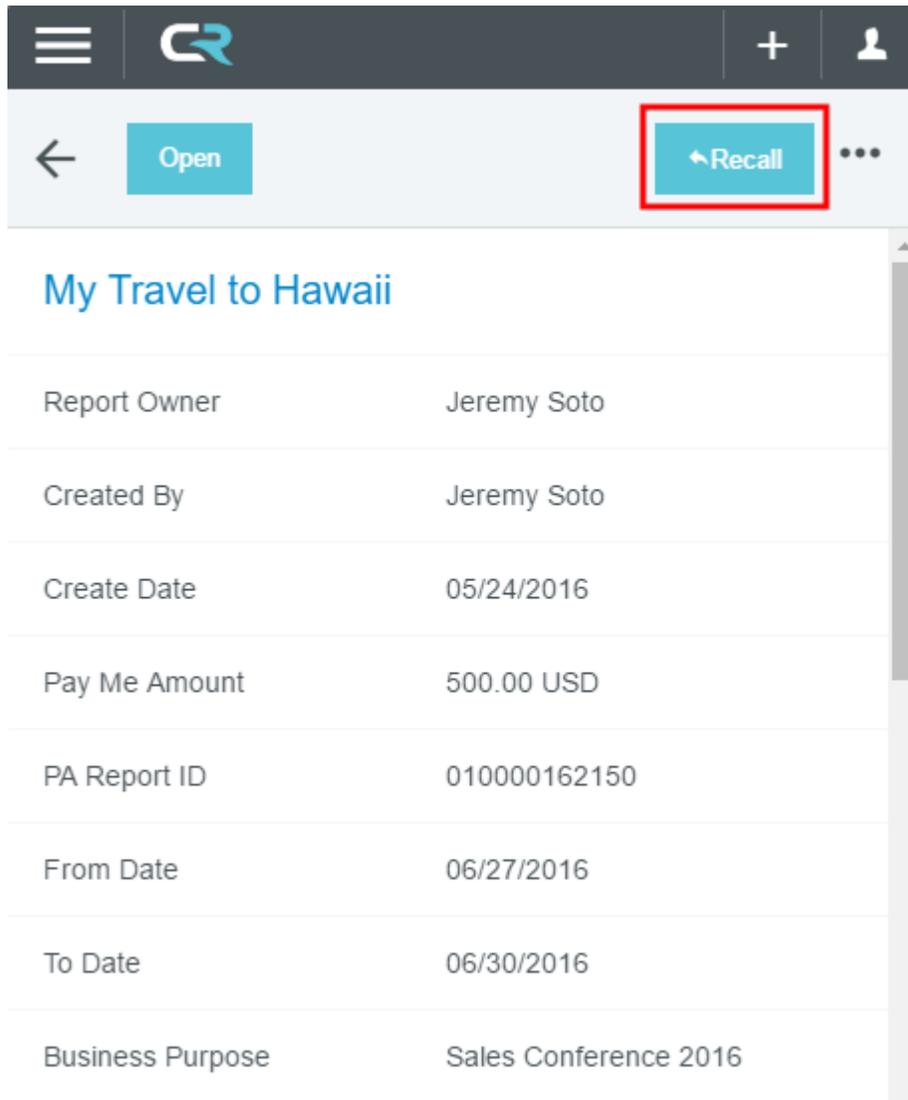
You may recall a submitted pre-approval as long as no line items have been fully approved. The RECALL button will not function for the pre-approvals with Expired, Applied, Partially Applied or Approved status.

1. Select a Pre-approval request with a “Pending Approval” status.

A screenshot of a mobile application interface showing a list of submitted pre-approvals. The header is a dark blue bar with a white checkmark icon and the text "Submitted Pre-Approvals". A hamburger menu icon is on the right. The list contains eight items, each with a title, status, date, and amount in USD. The item "My Travel to Hawaii" is highlighted with a red border. A vertical scrollbar is on the right side of the list.

Title	Status	Date	Amount (USD)
Test - Rebecca	Pending Approval	01/18	15,055,500.00
Conference Travel	Approved	11/22	1,500.00
Small Merchandise	Approved	07/12	595.00
My Future Trip to Dallas	Pending Approval	07/07	500.00
My Travel to Hawaii	Pending Approval	07/07	500.00
Conference in Chicago	Used / Expired	12/08	2,250.00
My Travel in September	Used / Expired	10/13	750.00

2. On the Preview screen, tap RECALL. This button is only accessible in the Preview, not if you open the pre-approval.



3. On the confirmation screen, tap YES. The pre-approval will become a draft and be moved to your Draft Pre-Approvals list but retain any notes that were entered during the incomplete approval process.



Recall This Report? ×

This report will be moved to the draft list.

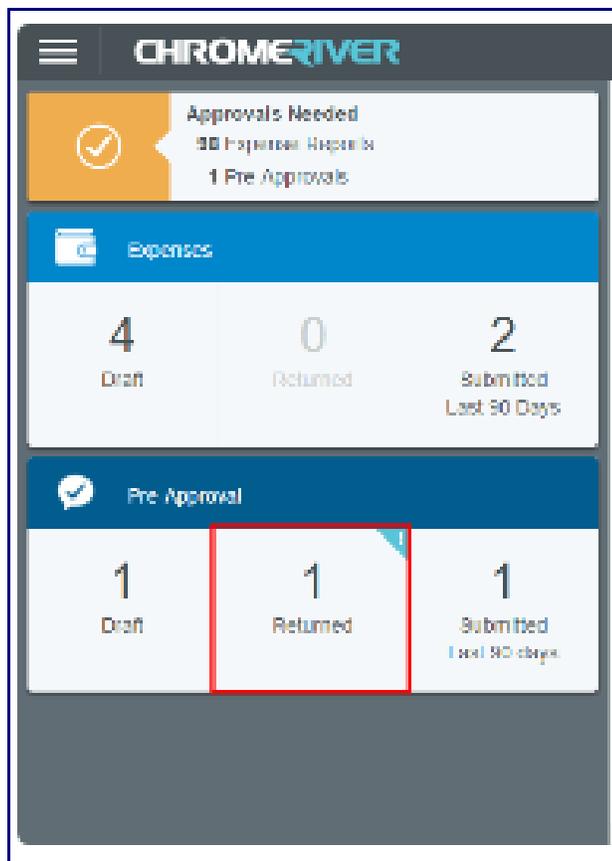
Yes

No

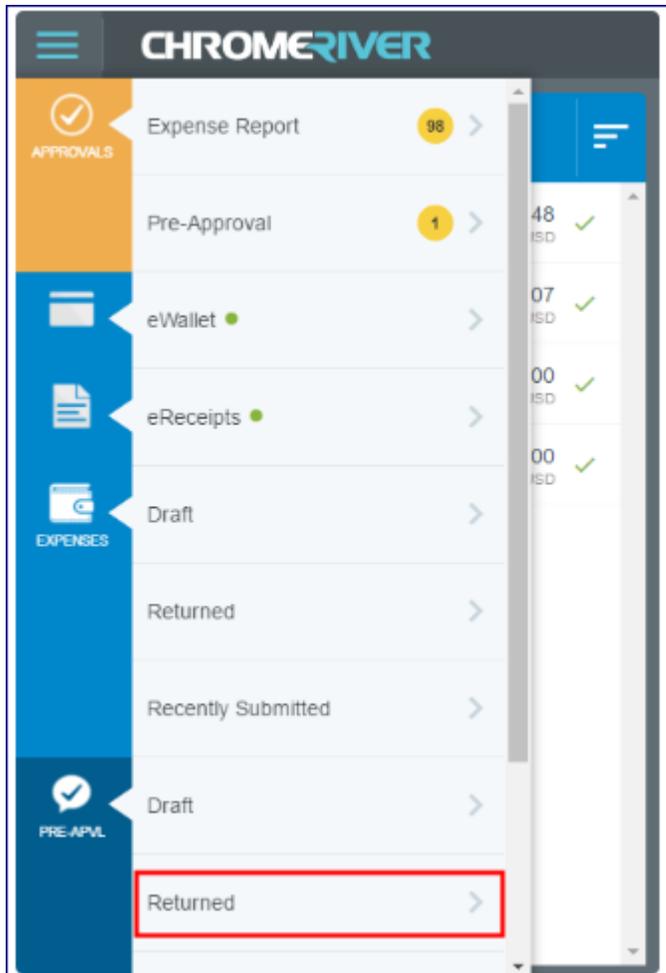
# Returned Pre-Approval

When an approver has returned a pre-approval request to the requester during the approval process, it will appear in the Returned Pre-Approvals list.

1. Tap on **RETURNED** in the Pre-Approval section of the Dashboard



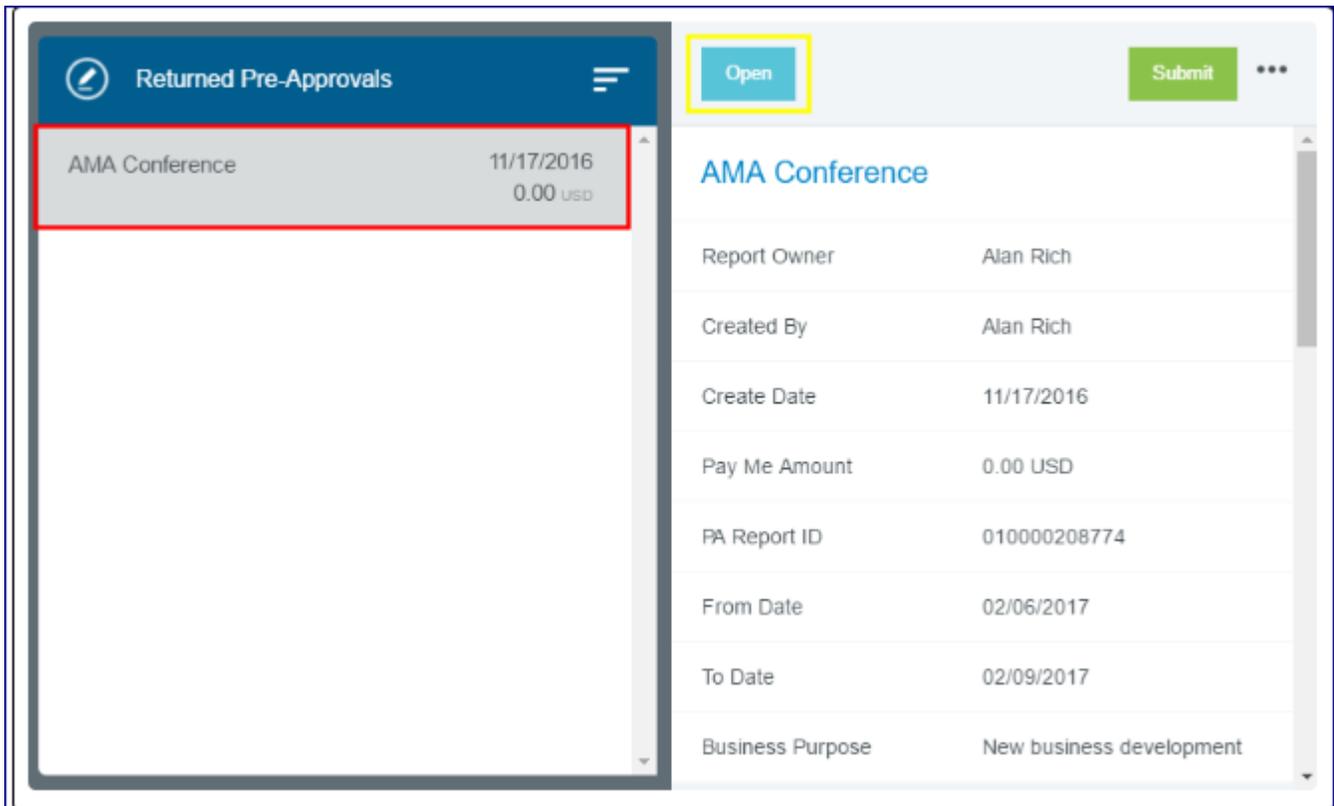
2. To access your returned pre-approvals from anywhere else in the interface, tap the **MENU** button and then tap **RETURNED** in the Pre-Approval section of the drop-down menu.



# Editing Returned Pre-Approval

1. Tap on the returned pre-approval you wish to view and a preview will slide in from the right. Tap **OPEN**.

Or just double-tap on the pre-approval in the list to open it.



2. Select the line item you wish to adjust and tap **EDIT**.

The screenshot shows a mobile application interface for managing expenses. On the left, a list of expenses for 'AMA Conference' is shown. The 'Airfare' item is highlighted in blue. On the right, the details for the 'Airfare' item are displayed, including the 'Estimated Amount' of 550.00 USD and a 'Description' field. At the top right, there are 'Delete' and 'Edit' buttons, with the 'Edit' button highlighted by a red box. At the bottom left, there is a 'Submit' button and a summary of the total estimated amount of 1,750.00 USD.

EXPENSE	ESTIMATED
Airfare	550.00 USD
Lodging	1,200.00 USD

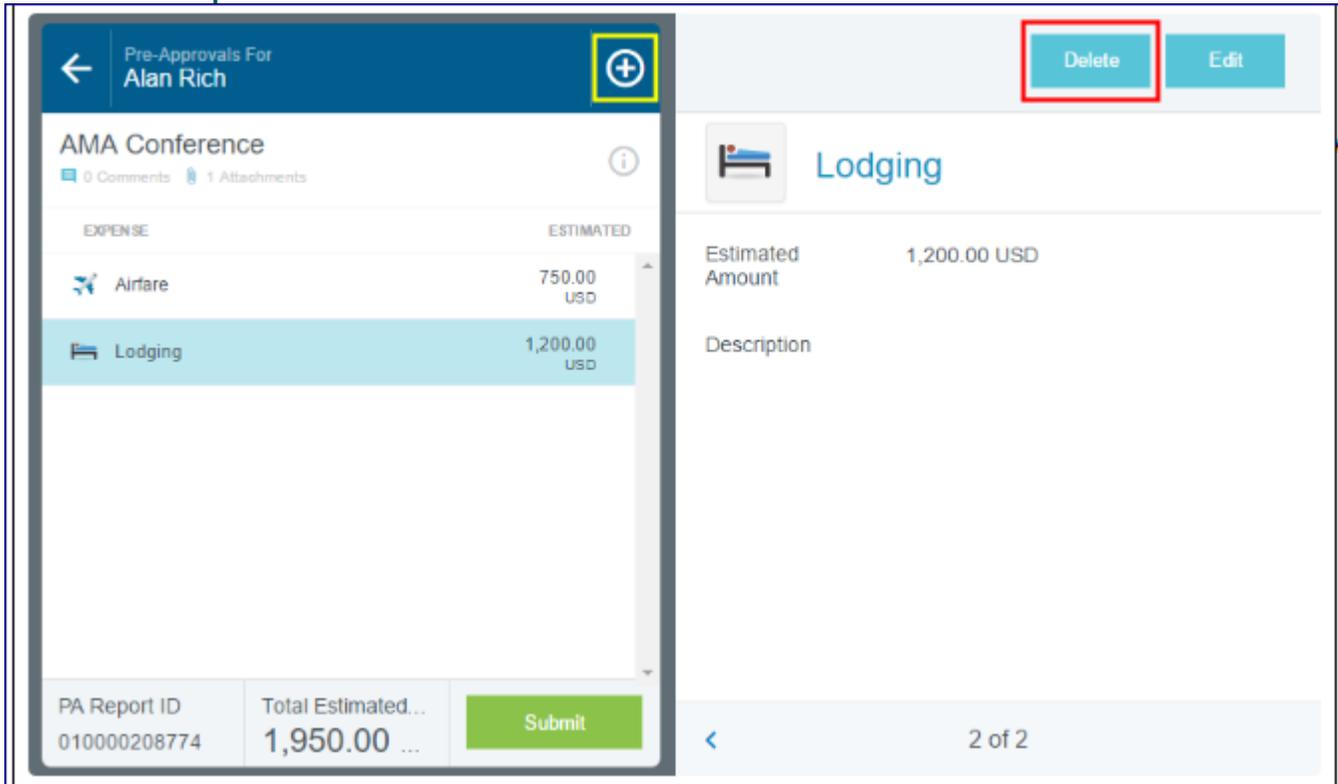
PA Report ID: 010000208774  
Total Estimated...: 1,750.00 ...

3. Change the amount, enter a Description, if desired, and tap **SAVE**.

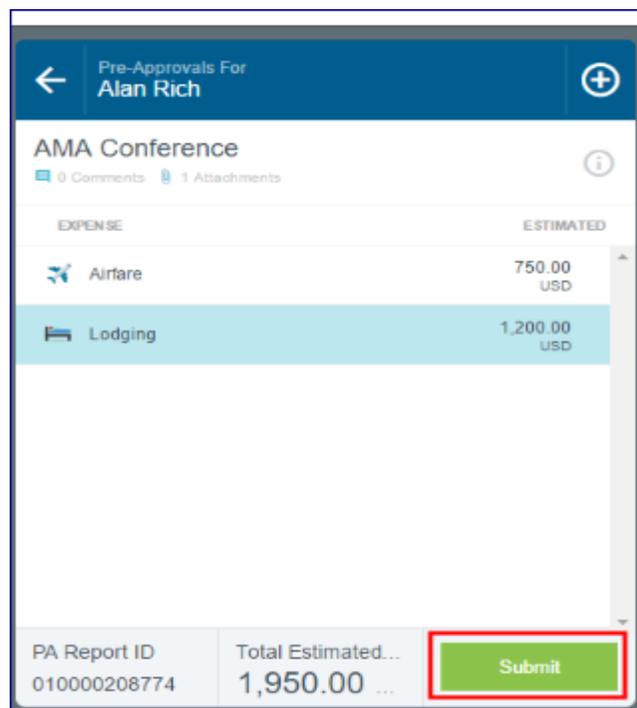
The screenshot shows the 'Airfare' item in edit mode. The 'Estimated Amount' field is set to 750.00 USD, and the 'Description' field contains the text 'I'd rather fly Business Class!'. At the top right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.

Estimated Amount: 750.00 USD  
Description: I'd rather fly Business Class!

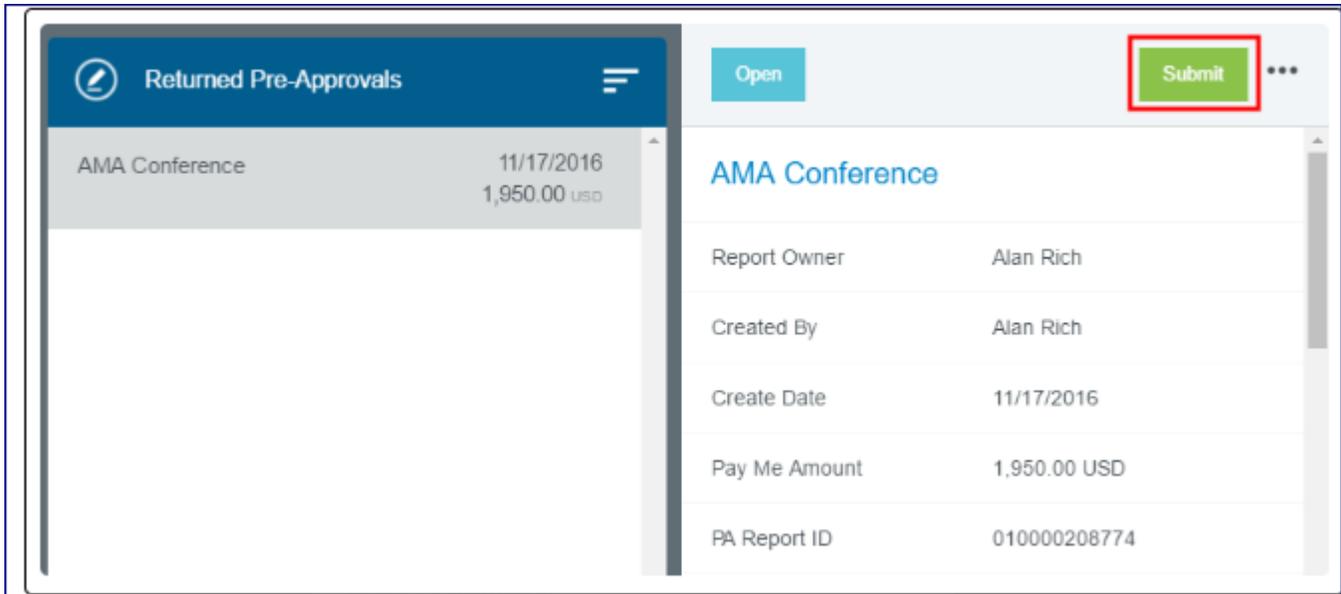
4. To delete the line item and create a new one, tap **DELETE**, then tap the + button to add a new line-item.



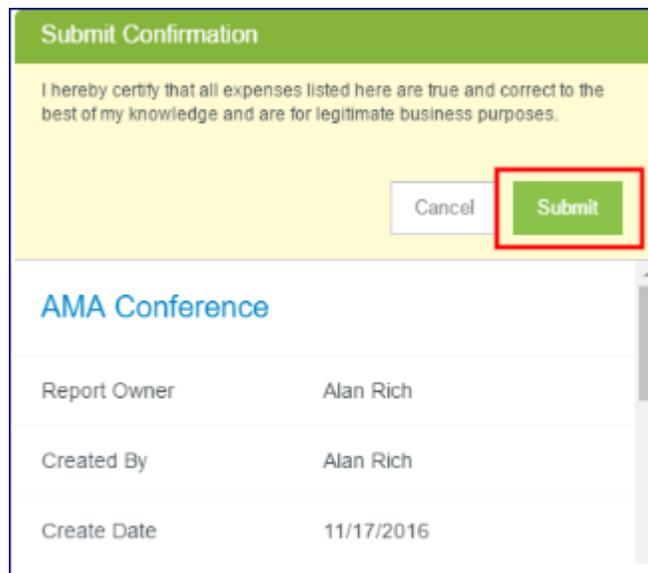
5. When you are ready to resubmit the pre-approval request, tap the green **SUBMIT** button from within the returned request.



Alternatively, you may re-submit the request from the Returned Pre-Approval lists. Tap the request to open its preview, then tap the green **SUBMIT** button in the upper right-hand corner.

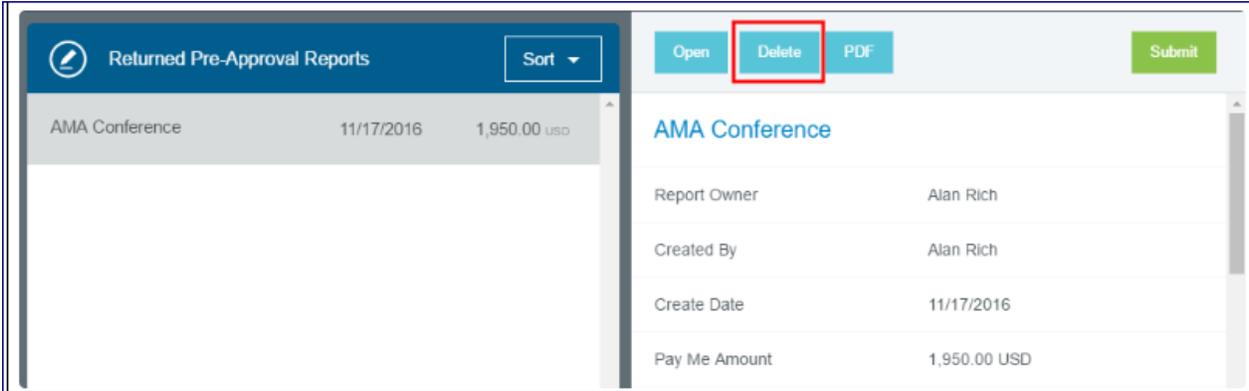


6. On the Submit Confirmation screen, tap **SUBMIT**.

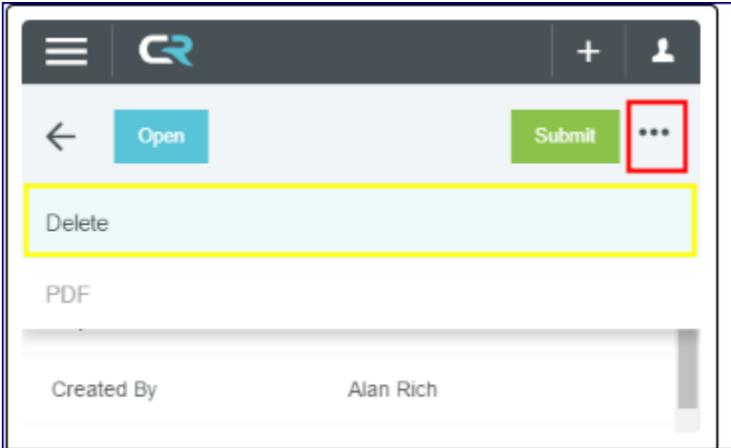


# Deleting Returned Pre-Approval

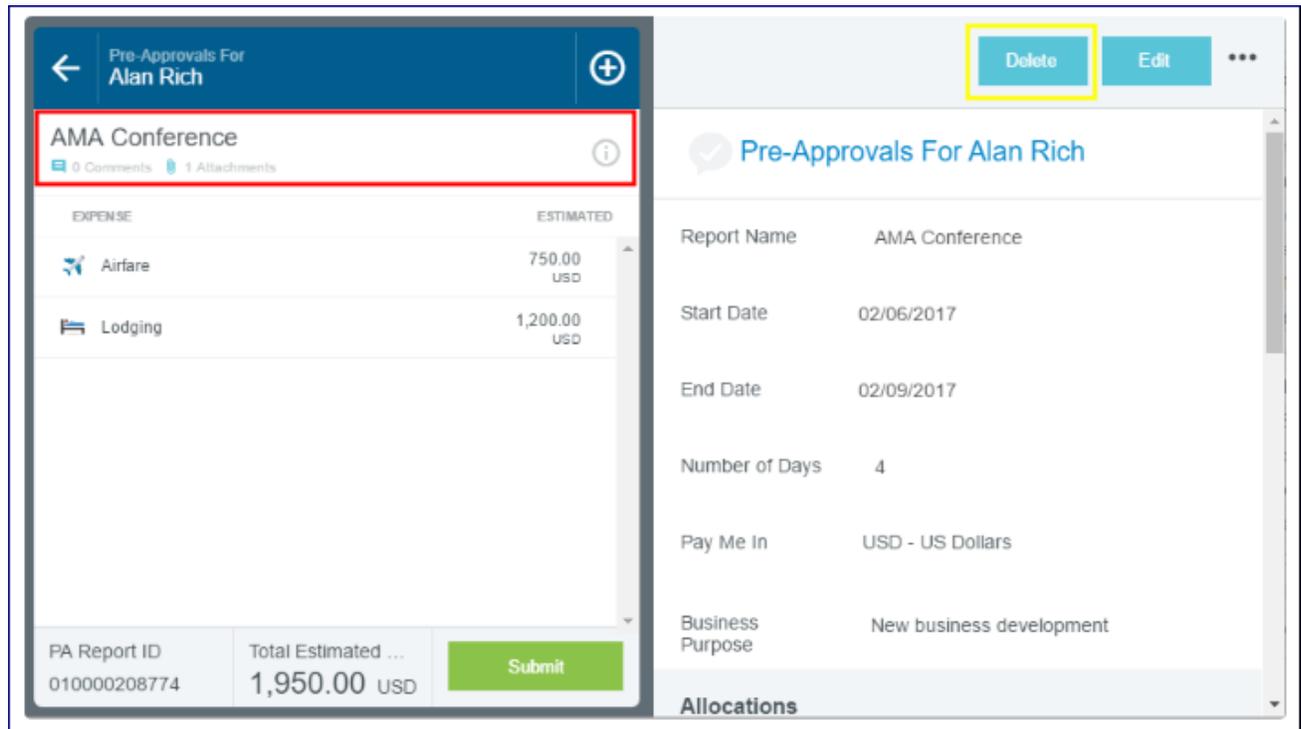
1. To delete your entire pre-approval request and start over, tap it in the Returned Pre-Approval Reports list to open the preview, and then tap **DELETE**.



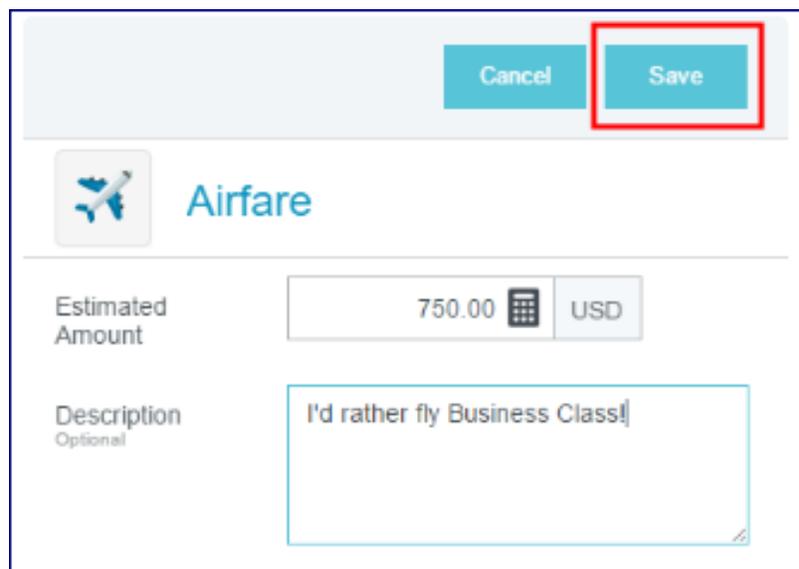
2. On narrow-screen devices, **DELETE** will be found under the three-dots drop-down menu.



3. Alternatively, you may double-tap to open the request, tap the header to open the preview, then tap **DELETE** in the preview



4. You will be asked to confirm the deletion. Tap **DELETE**.



# Attach Pre-Approval

1. Create an expense report including the actual expense amounts related to the pre-approval. When the draft expense report is ready to be submitted, tap on the header to bring up the preview, if necessary, then tap **ADD PRE-APPROVAL REPORT**.

The screenshot displays the ChromeRiver mobile application interface. The top navigation bar includes a menu icon, the 'CHROMERIVER' logo, and a '+ New' button next to the user name 'Alan Rich'. The main content area is split into two panels. The left panel shows the 'Expenses For Alan Rich' report titled 'Travel to Global Conference', which includes a table of expenses and a summary section. The right panel shows the report details, including 'Report Name', 'Pay Me In', 'Report Type', and 'Business Purpose'. A red box highlights the '+ Add Pre-Approval Report' button in the right panel.

DATE	EXPE...	SPENT	PAY ME		
Fri 11/18/2018	A	650.00 USD	650.00		✓
Fri 11/18/2018	D	300.00 USD	300.00		✓
Fri 11/18/2018	M	650.00 USD	650.00		✓
Fri 11/18/2018	H	978.00 USD	978.00		✓
Fri 11/18/2018	R	978.00 USD	978.00		✓

Expense Report: 010015088007  
Total Pay Me A...: 2,578.00 USD  
Submit

Report Name: Travel to Global Conference  
Pay Me In: USD - US Dollars  
Report Type: Travel  
Business Purpose: Attend Global Conference

+ Add Pre-Approval Report

Comments (0)  
Add Comment Post

2. On the Apply Pre-Approval screen, tap the **Select a Pre-Approval Report** drop-down and then tap on the corresponding pre-approval request.

The screenshot shows a mobile application interface titled "Apply Pre-Approval". At the top, there is a teal header with the title and a close button (X). Below the header is a search or selection field labeled "Select a pre-approval report" with a downward arrow. Underneath is a list of pre-approval reports. The first item, "Travel to Global Conference", is highlighted with a red border and has a remaining amount of "2,578.00USD". The second item, "Attend Technology Conference - October 2017", has a remaining amount of "2,482.00USD". The list has a scrollable appearance with upward and downward arrows on the right side.

REPORT NAME	REMAINING
Travel to Global Conference	2,578.00USD
Attend Technology Conference - October 2017	2,482.00USD

3. Be sure that all expenses related to the pre-approval are on the expense report. A pre-approval may only be used once.

The Expense Summary shows the remaining amounts available for each type of expense. The Spent amount is displayed in green if these fall within the original approved amount. The Spent amount is displayed in red if it exceeds the original approved amount.

Tap **APPLY** to attach the request to your expense report.

The screenshot shows a mobile application interface for applying a pre-approval. At the top, there is a teal header with the text 'Apply Pre-Approval' and a close button (X). Below the header is a dropdown menu with the text 'Travel to Global Conference'. The main content is divided into sections: 'Report Summary' and 'Expense Summary'. The 'Report Summary' section includes 'From Date' (09/26/2016) and 'To Date' (09/30/2016). The 'Expense Summary' section is a table with columns for 'REMAINING (USD)' and 'SPENT (USD)'. The 'SPENT' column values are color-coded: green for amounts within the limit and red for amounts exceeding the limit. Below the table is an 'Allocations' section with a single entry: '0000-00-00 Reimbursable Default Accounting' with a value of 2,578.00. At the bottom right, there is a green 'Apply' button highlighted with a red border.

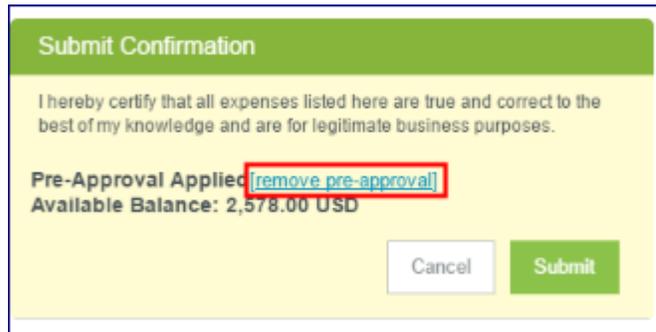
	REMAINING (USD)	SPENT (USD)
Airfare	650.00	650.00
Lodging	978.00	978.00
Meals	300.00	300.00
Other	650.00	800.00
<b>Total</b>	<b>2,578.00</b>	<b>2,728.00</b>

Allocations

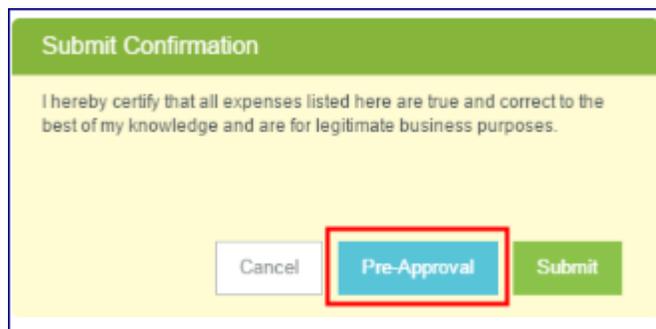
0000-00-00 Reimbursable Default Accounting	2,578.00
--	----------

Apply

4. You will be asked to confirm that the expenses are correct. The Submit Confirmation screen also displays the pre-approval request's available balance and gives you the option to tap **REMOVE PRE-APPROVAL** if you no longer wish to attach it.



If you opt to remove the pre-approval request before you submit your expense report, you will have the option to attach a different pre-approval by tapping the **PRE-APPROVAL** button on the Submit Confirmation screen.



5. When the correct pre-approval request has been attached, tap **SUBMIT**.

**Submit Confirmation**

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

Pre-Approval Applied [\[remove pre-approval\]](#)  
Available Balance: 2,578.00 USD

Cancel **Submit**

**Travel to Global Conference**

Report Owner Alan Rich

Expense Report ID 010015088007

**Financial Summary**

	AMOUNT (USD)	APPROVED (USD)
Total Expense Reported	2,728.00	0.00
Less Cardholder Responsibility	0.00	0.00

## Detaching Pre-Approvals

Pre-approvals will be unlinked from any expense report that has been recalled or reset in the approval routing process, as well as any deleted expense report. Disassociating pre-approvals from these types of expense reports allows users to reattach them to new reports, as necessary.

# Approve By Email

Chrome River will email you the pre-approval request that needs your approval. You can approve the expenses or return them to the requester with questions or comments simply by forwarding the email. The instructions are included in the email.

Chrome River Pre-Approval Request [A Rich] Inbox x

**expense-noreply@chromefile.com** 4:17 PM (22 hours ago) ☆  
to CraneCompany ▾

Pre-Approval ID: 0100-0020-8774

<b>ACTION REQUIRED</b>		Chrome River
Pre-Approval Request For	Alan Rich	
Report Name	AMA Conference	
Pre-Approval ID	0100-0020-8774	
Submit Date	11/17/2016	
Expense Dates	02/06/2017 - 02/09/2017	
Total Expenses Approved	1,750.00 USD	

<b>Account Summary</b>				Amount (USD)
3000-0001	100%	TCC CHARGE	General Chargeable Business Development	1,750.00

<b>Expense Summary</b>		Amount (USD)
Airfare		550.00
Lodging		1,200.00

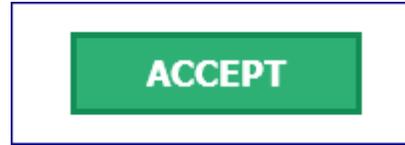
**ACCEPT** **RETURN**

Pre-Approval ID: 0100-0020-8774

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@chromefile.com](mailto:approve@chromefile.com) or [return@chromefile.com](mailto:return@chromefile.com) with any comments at the top of the forwarded message.

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

1. To approve a Pre-Approval, Tap on the **ACCEPT** button. An email window will open up. Simply send the email.



2. To return the Pre-Approval, Tap on the **RETURN** button. An email window will open up. Add any details you want to share with the Expense Owner as to why the Pre-Approval is being returned. Simply send the email.

