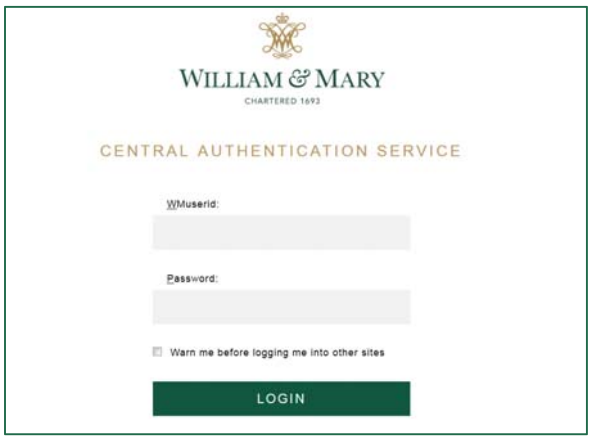
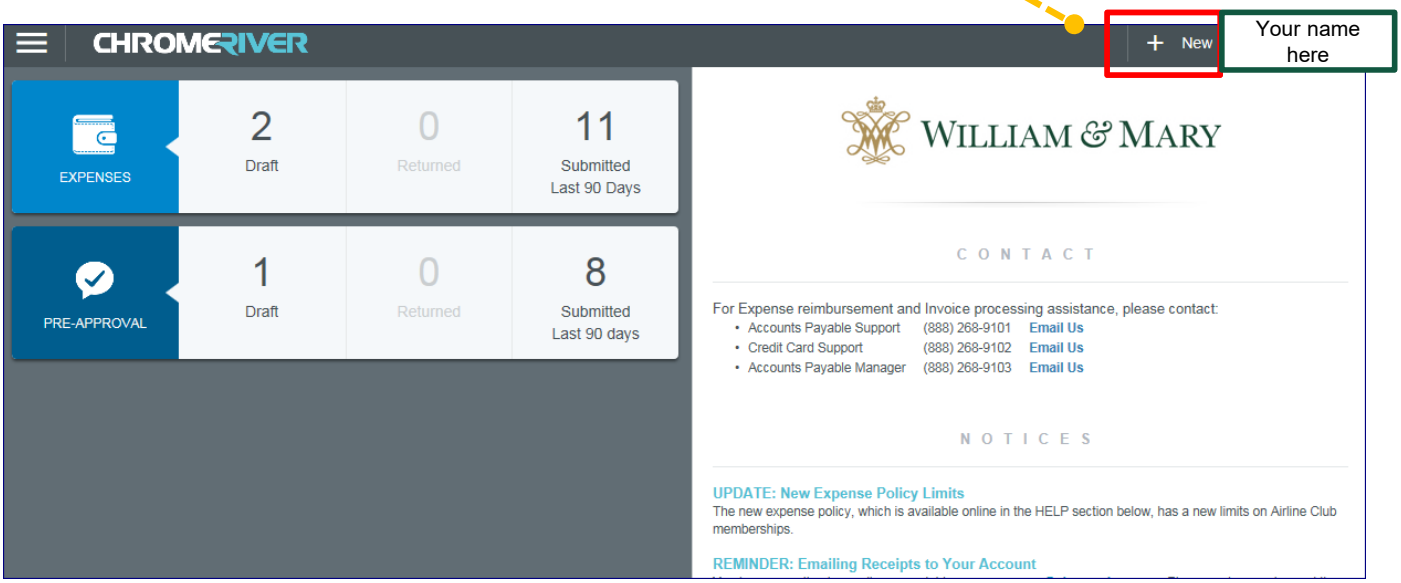
Pre-Approval Basics

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

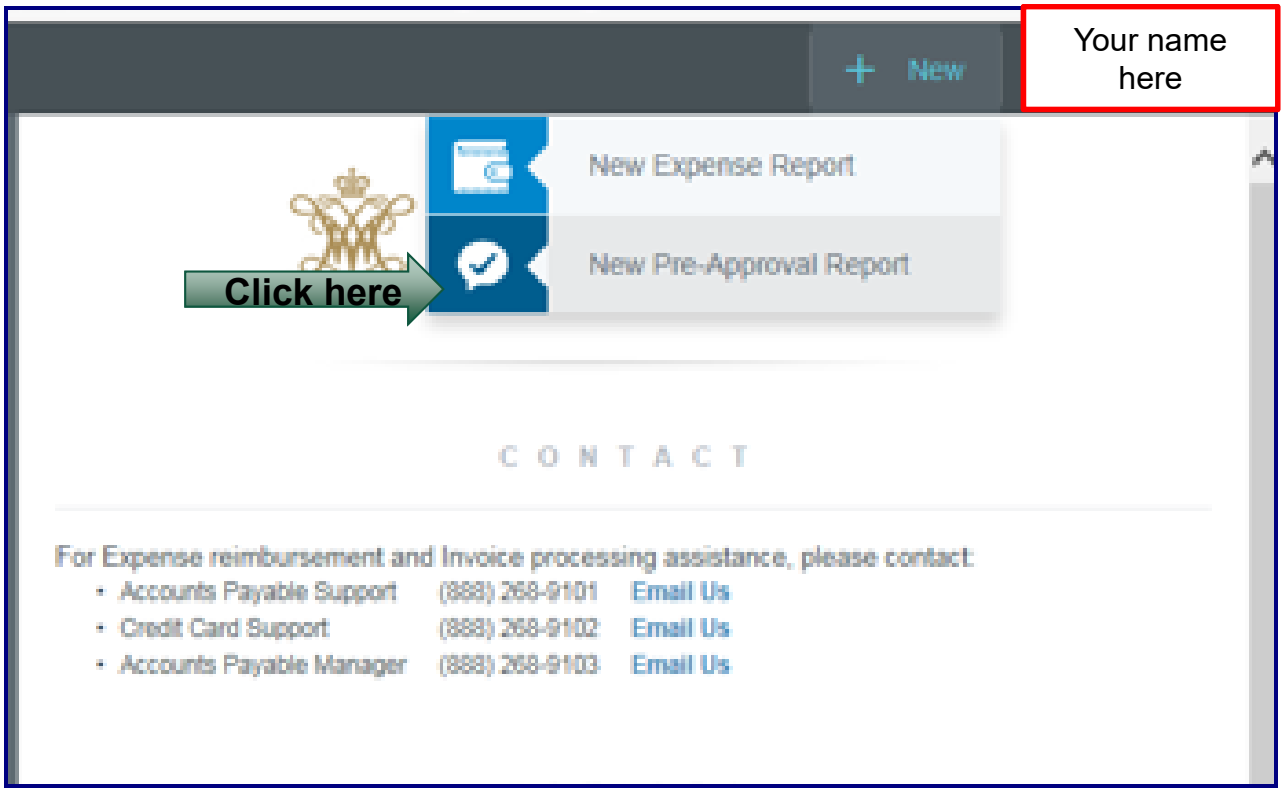


3. On the Dashboard page, click on the +New Icon



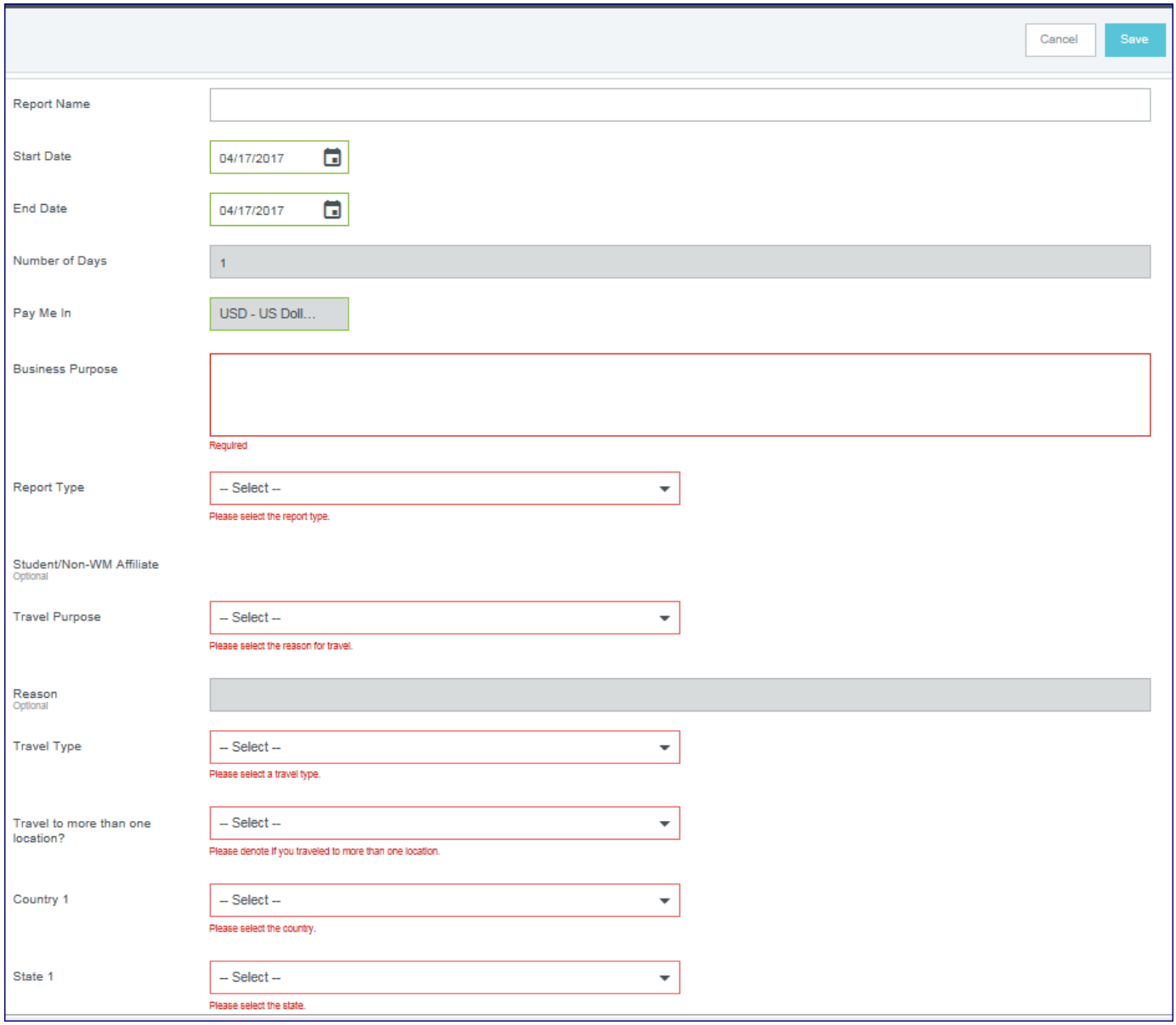
Completing the Pre-Approval Header

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



Pre-Approval Header

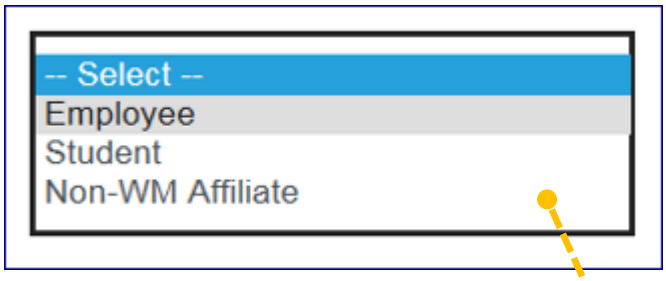
5. Complete all fields. Notice the Start and End Dates default to today's date. Remember to update the dates for the actual dates of travel.



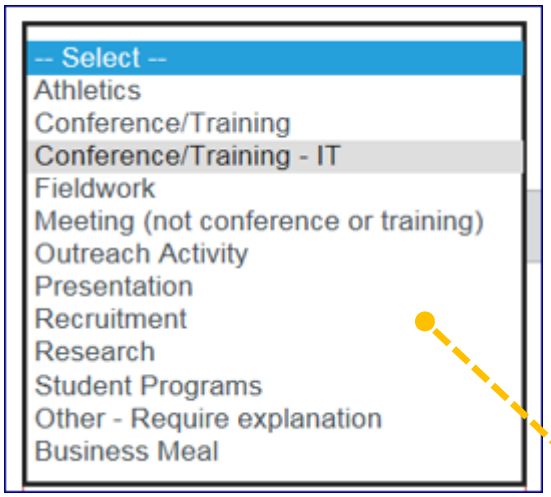
Header Drop Down Menus

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.

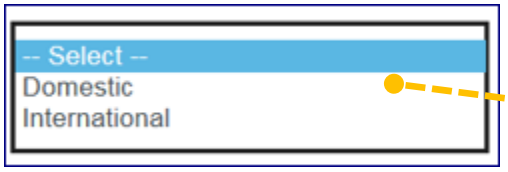
Report Type



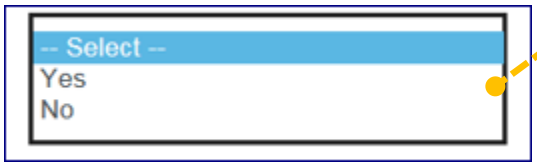
Travel Purpose



Travel Type



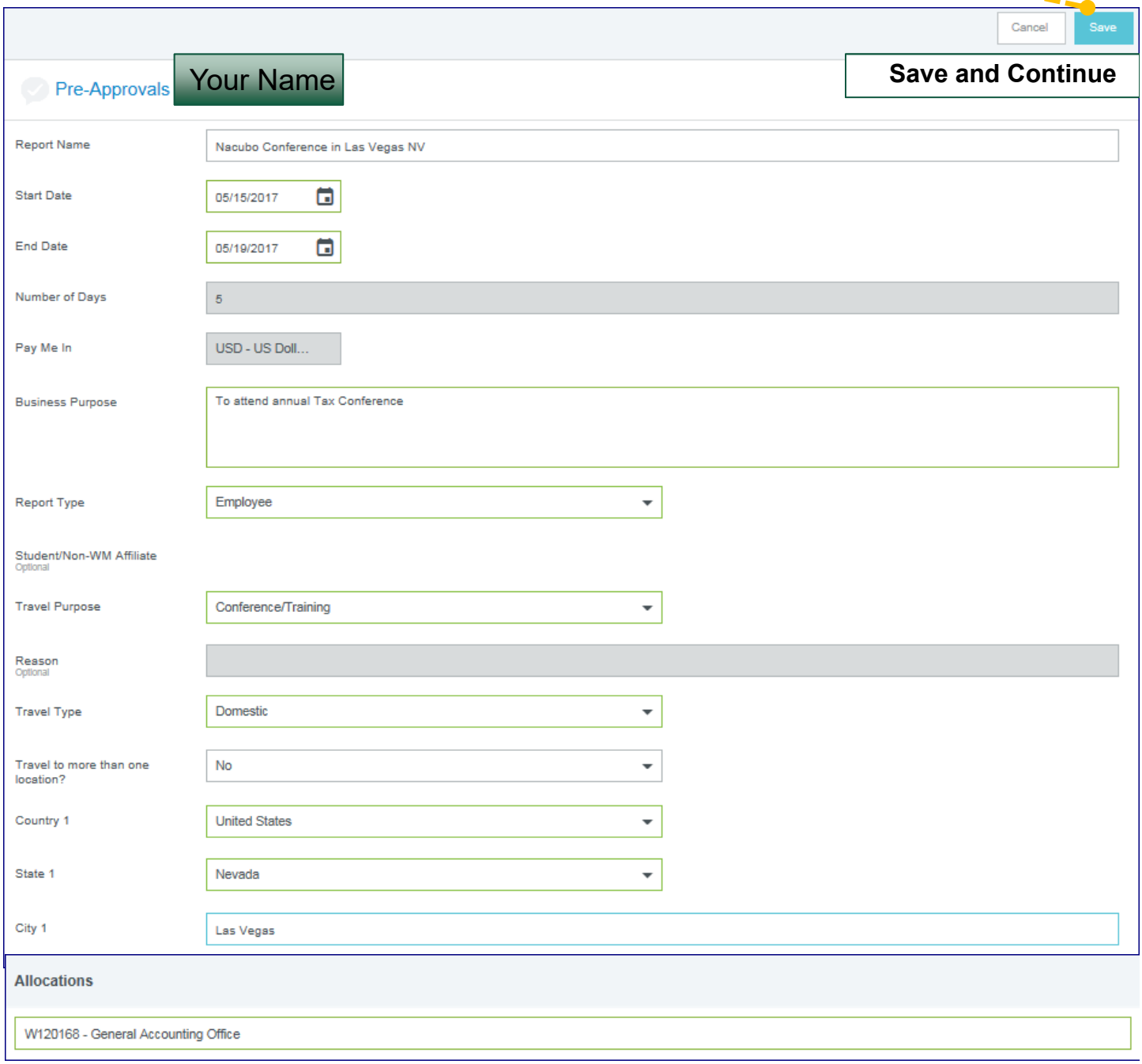
Travel to more than one location



Select the correct choice for your travel

Review of Completed Pre-Approval Header

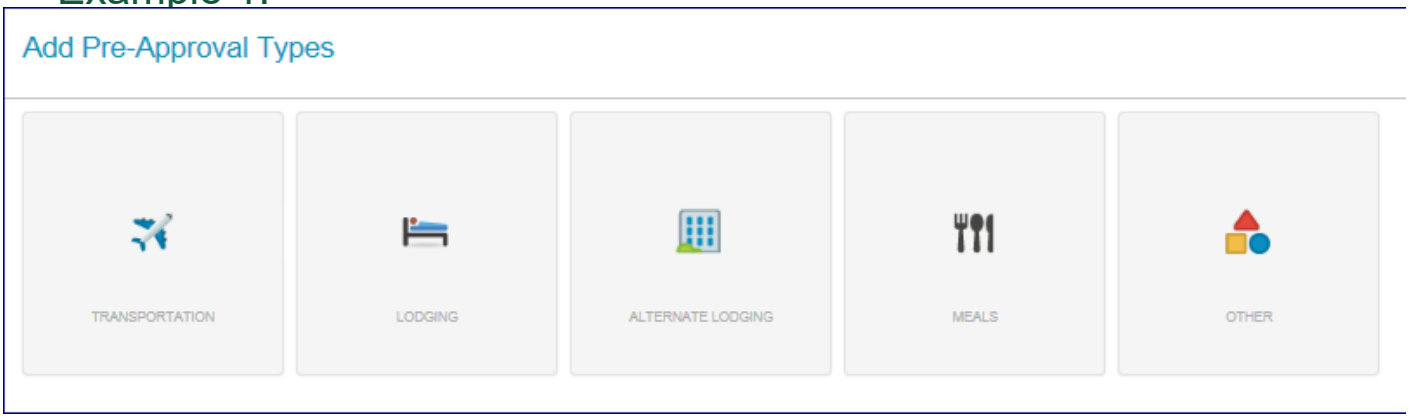
7. Once all fields are completed you must click save

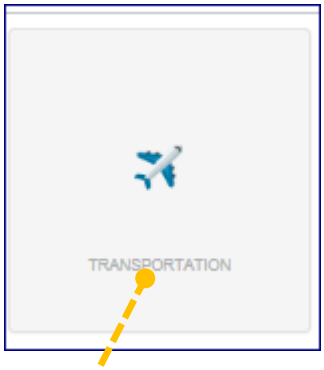


Add Pre-Approvals Expenditures

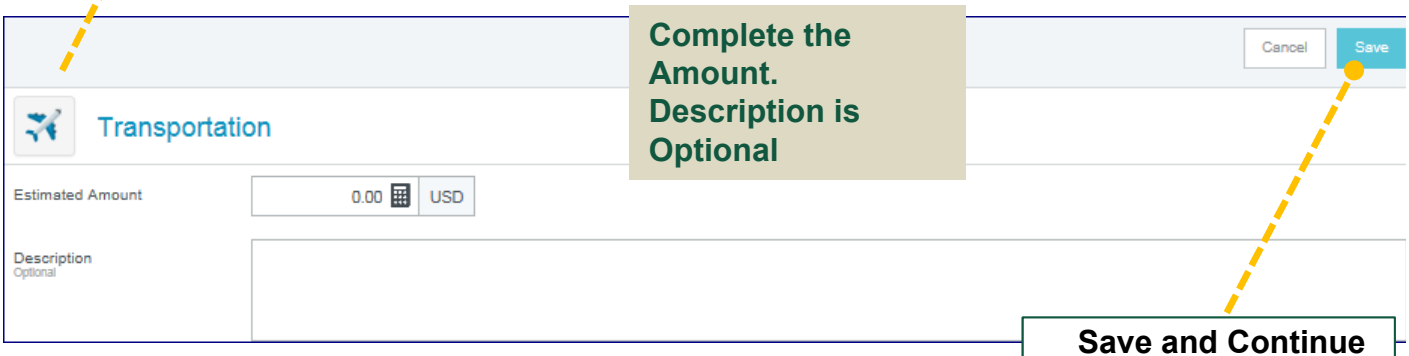
8. In this next section you will add the Estimated Expenses of Travel. Click on each icon below to enter the amount for each expense.

Example 1:





Click Here

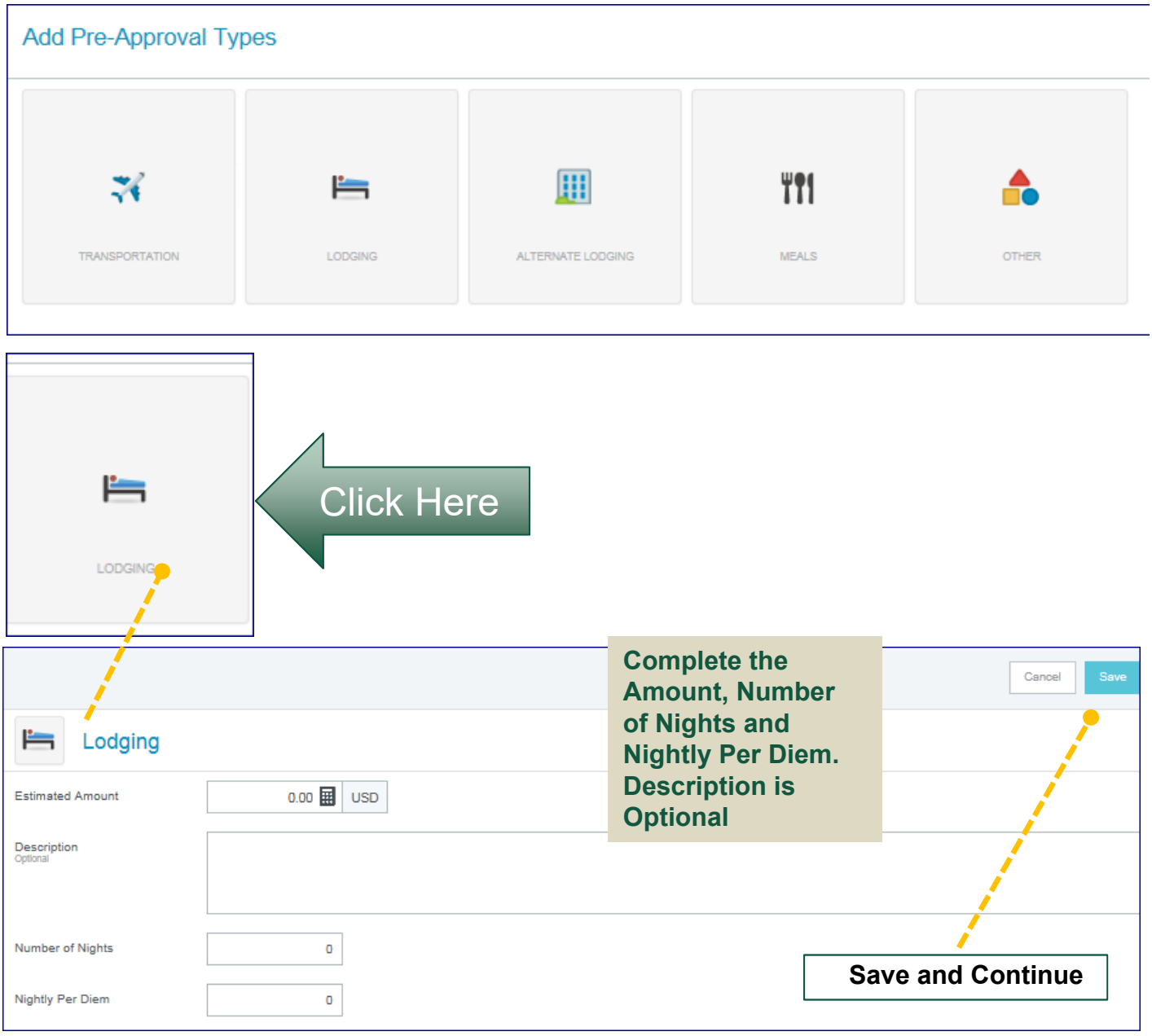


Complete the Amount. Description is Optional

Save and Continue

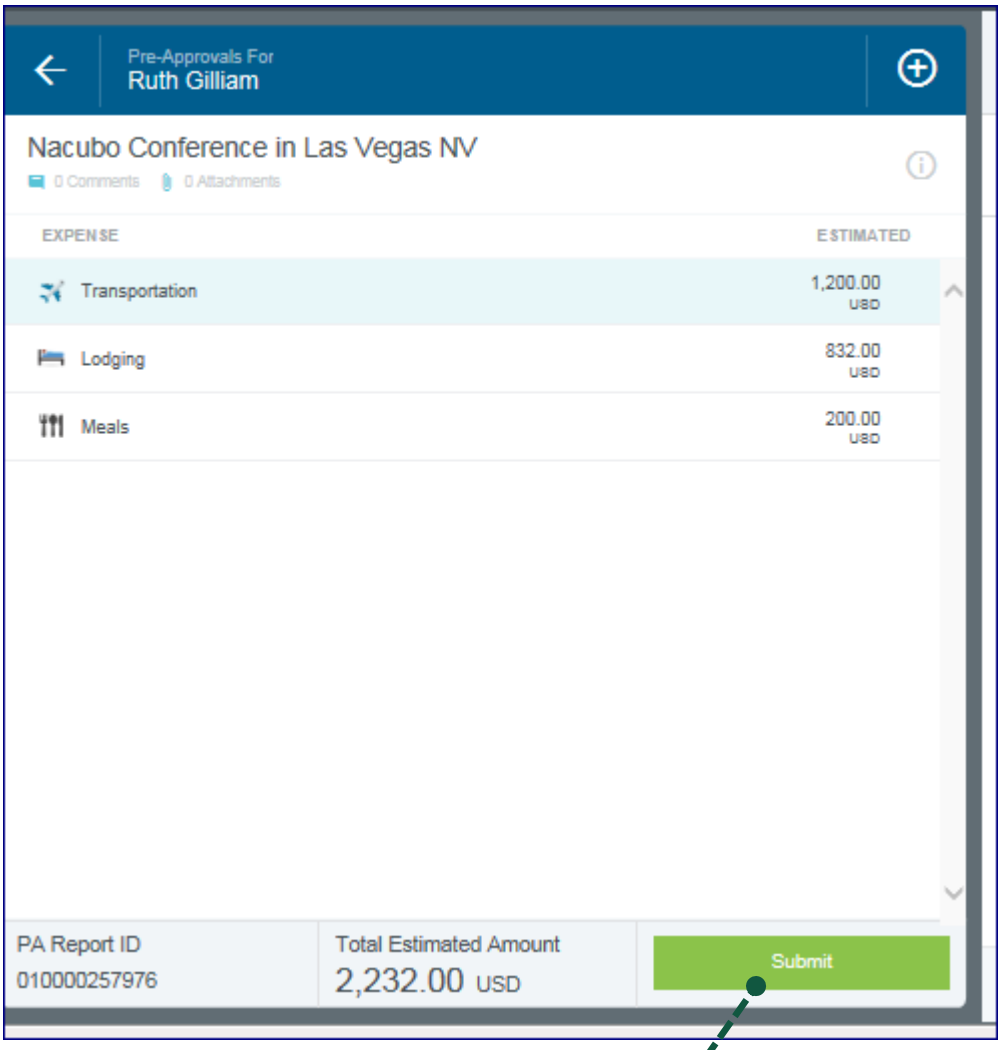
Add Pre-Approvals Expenditures

Example 2:



Submit Confirmation

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

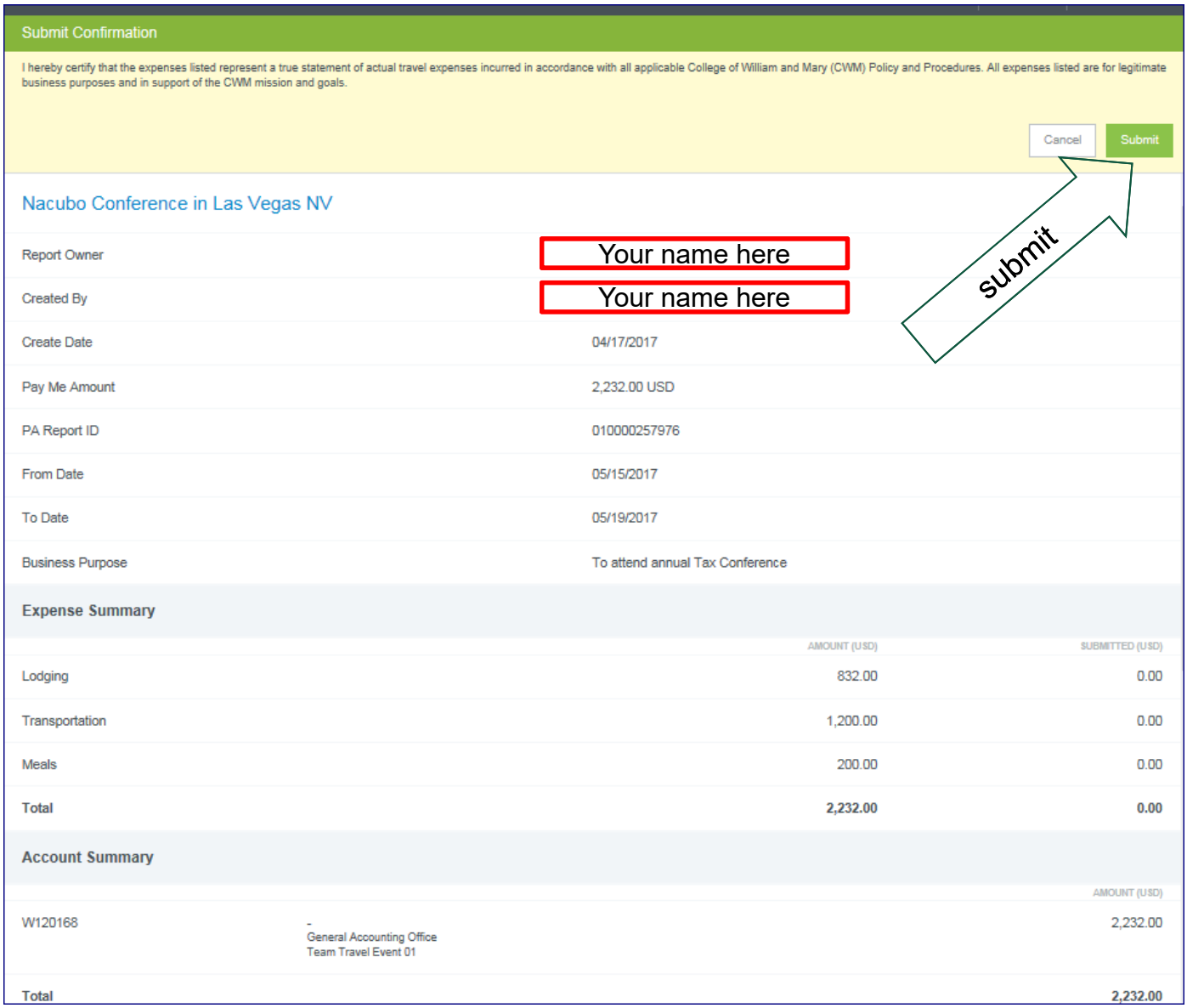


Once you have completed your Pre-Approval Expenses – Click Submit

Employee Certification

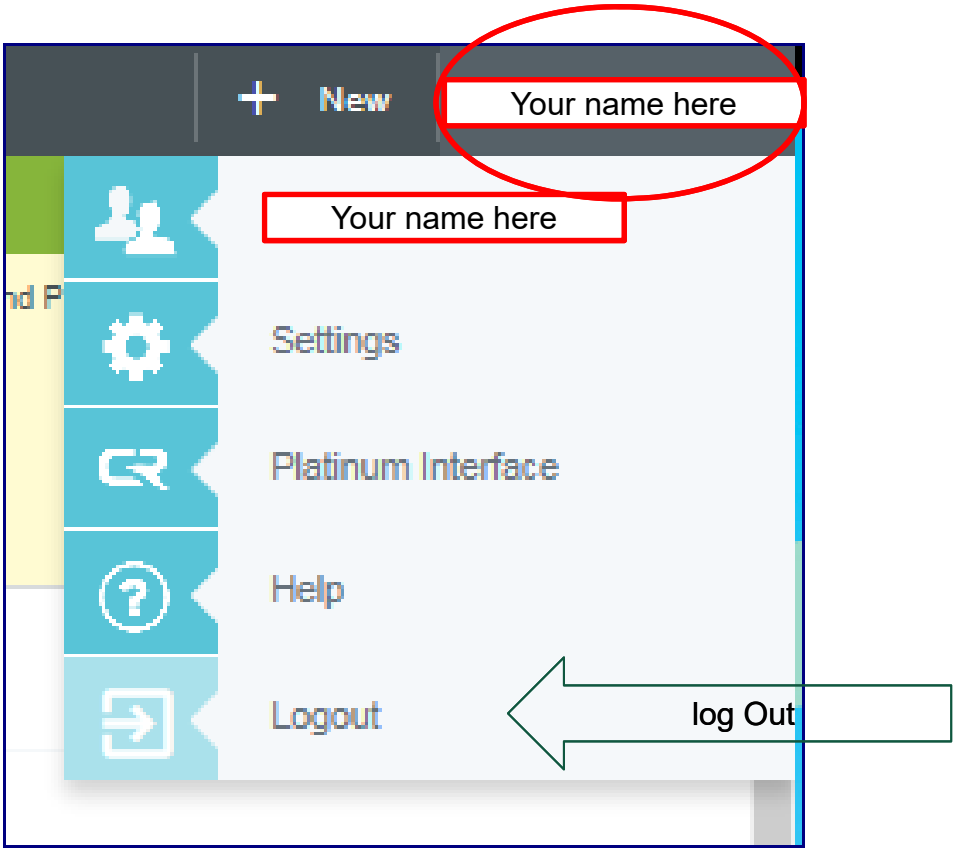
10. Please read employee certification and click Submit. This is your last action.

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



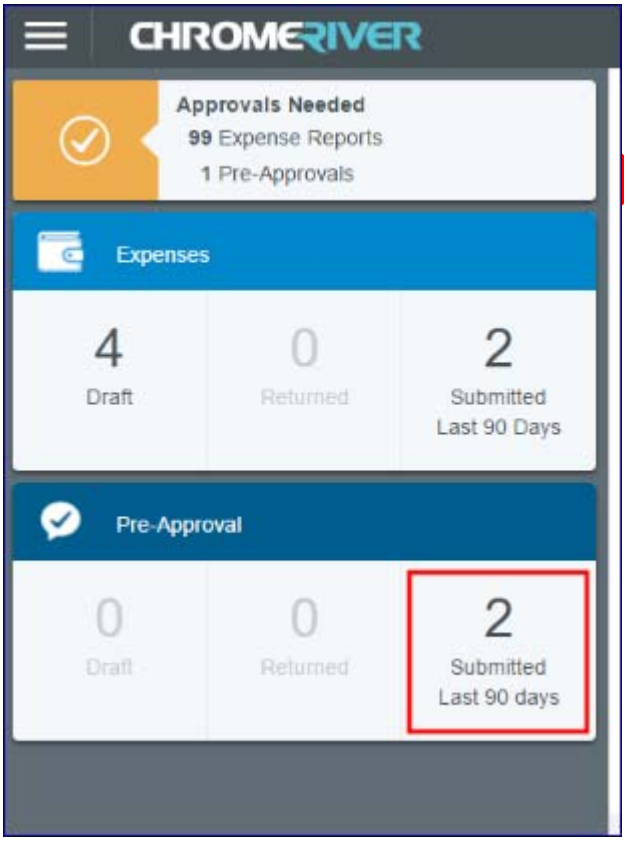
Logout of Chrome River

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**.

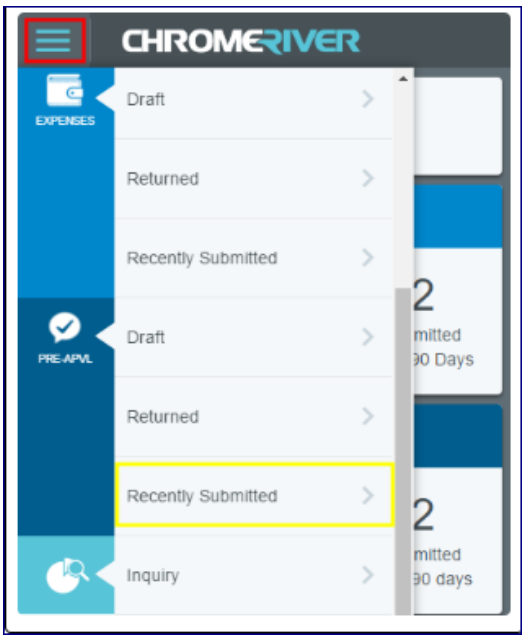


Track Pre-Approval

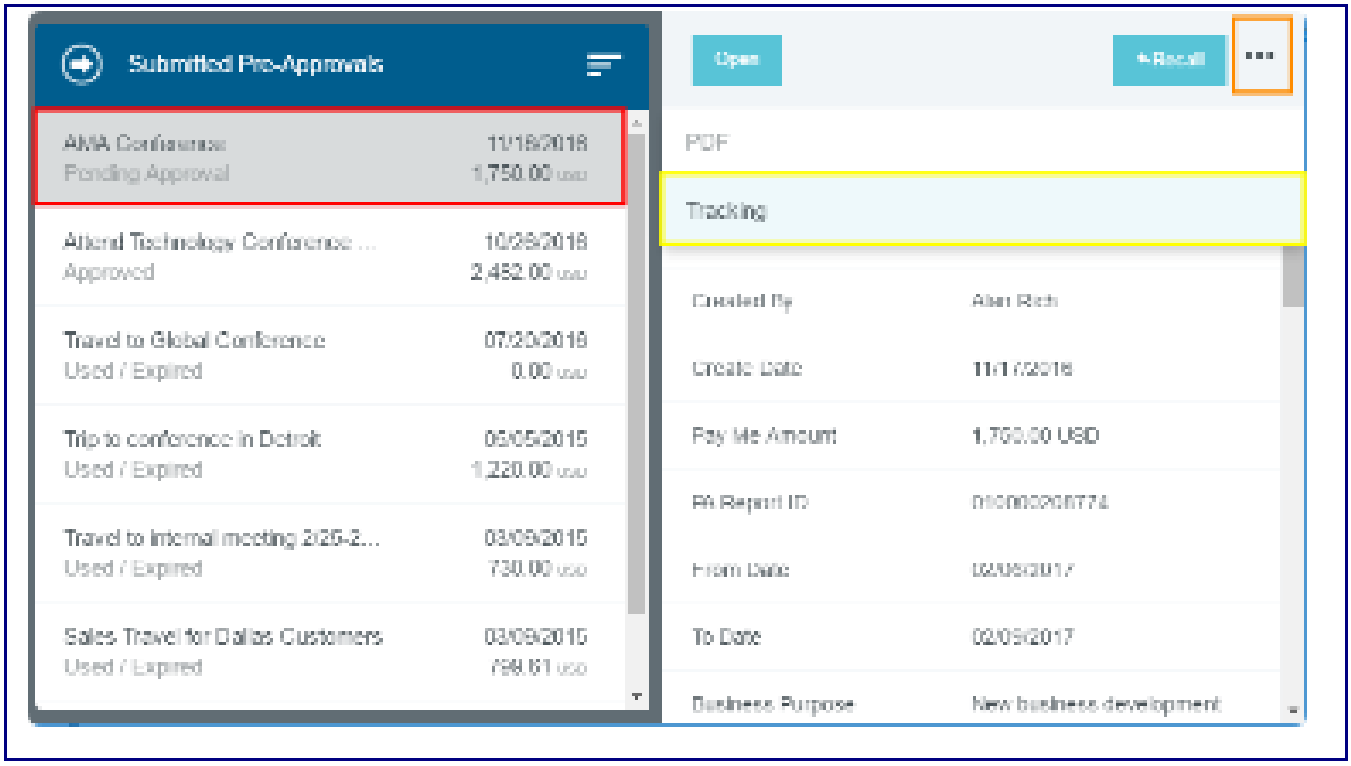
1. To track your submitted pre-approval request, tap on **SUBMITTED LAST 90 DAYS** in the Pre-Approval Section of the Dashboard.



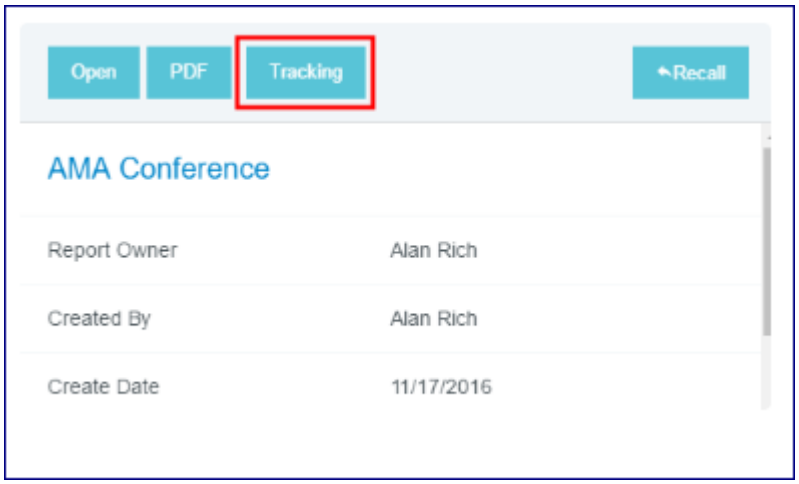
2. To access your submitted pre-approvals from anywhere else in the interface, tap the MENU button and then tap **RECENTLY SUBMITTED** in the Pre-Approval section of the drop-down menu.



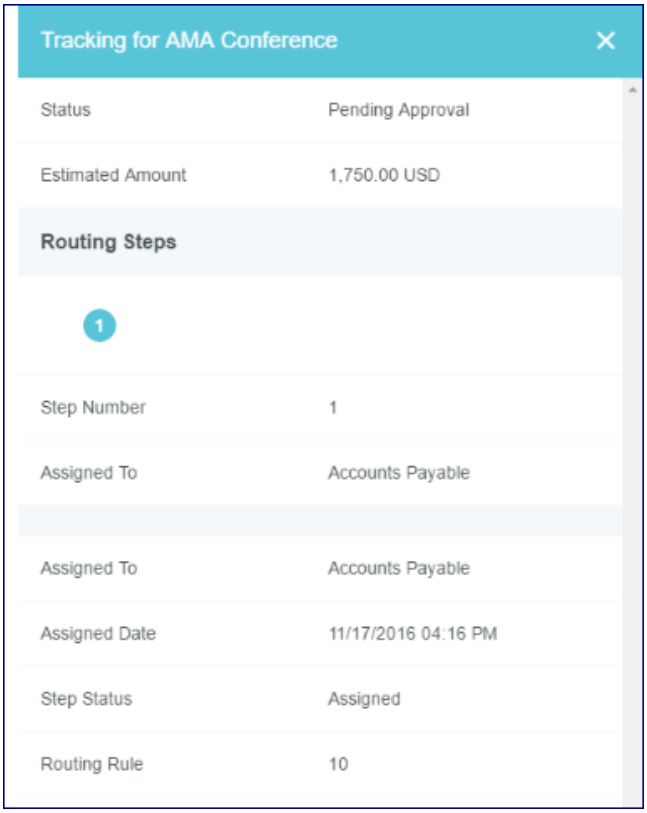
3. Find the pre-approval in the list and tap it to display the preview. Then tap the three-dots icon and select TRACKING in the drop-down list.



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



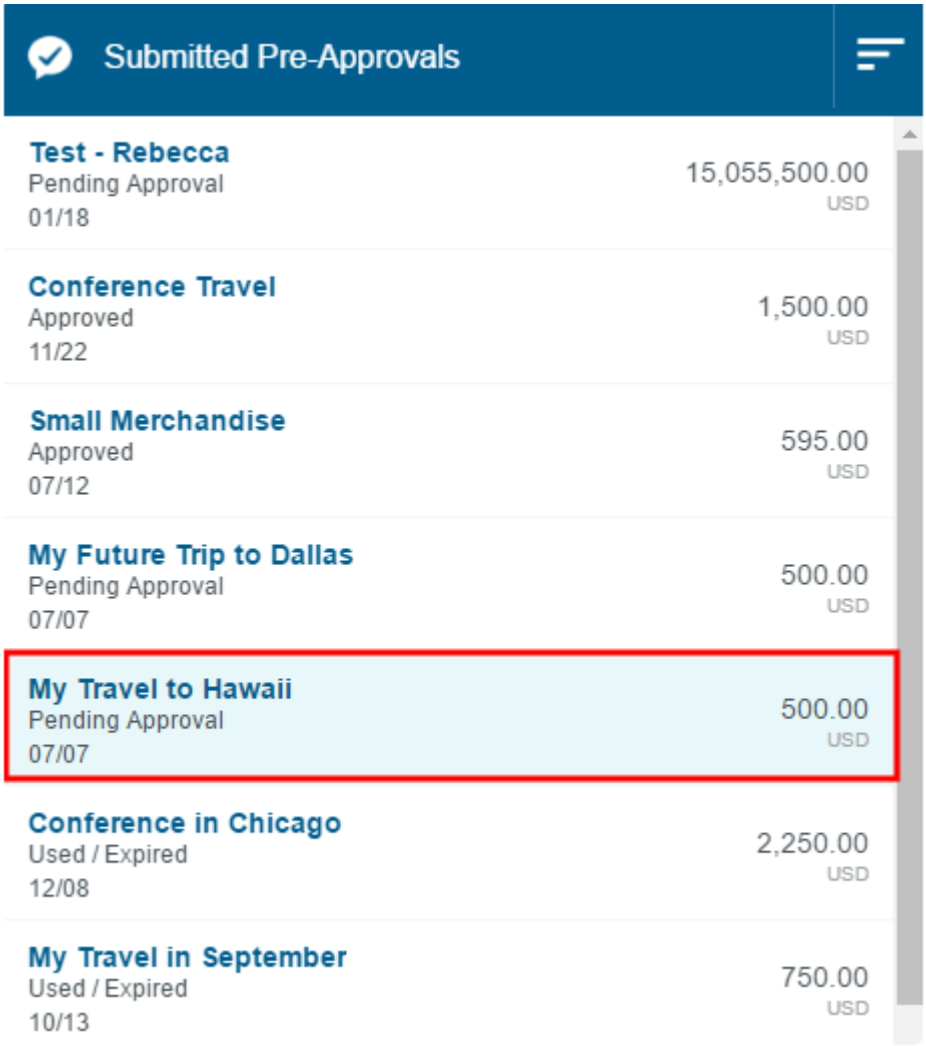
5. You may track the pre-approval request's progress on the Tracking screen, including who it has been assigned to, the applicable routing rules, and status at each step. If multiple routing step numbers are displayed, you may tap each one to see all the details for that step. Tap the X in the upper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



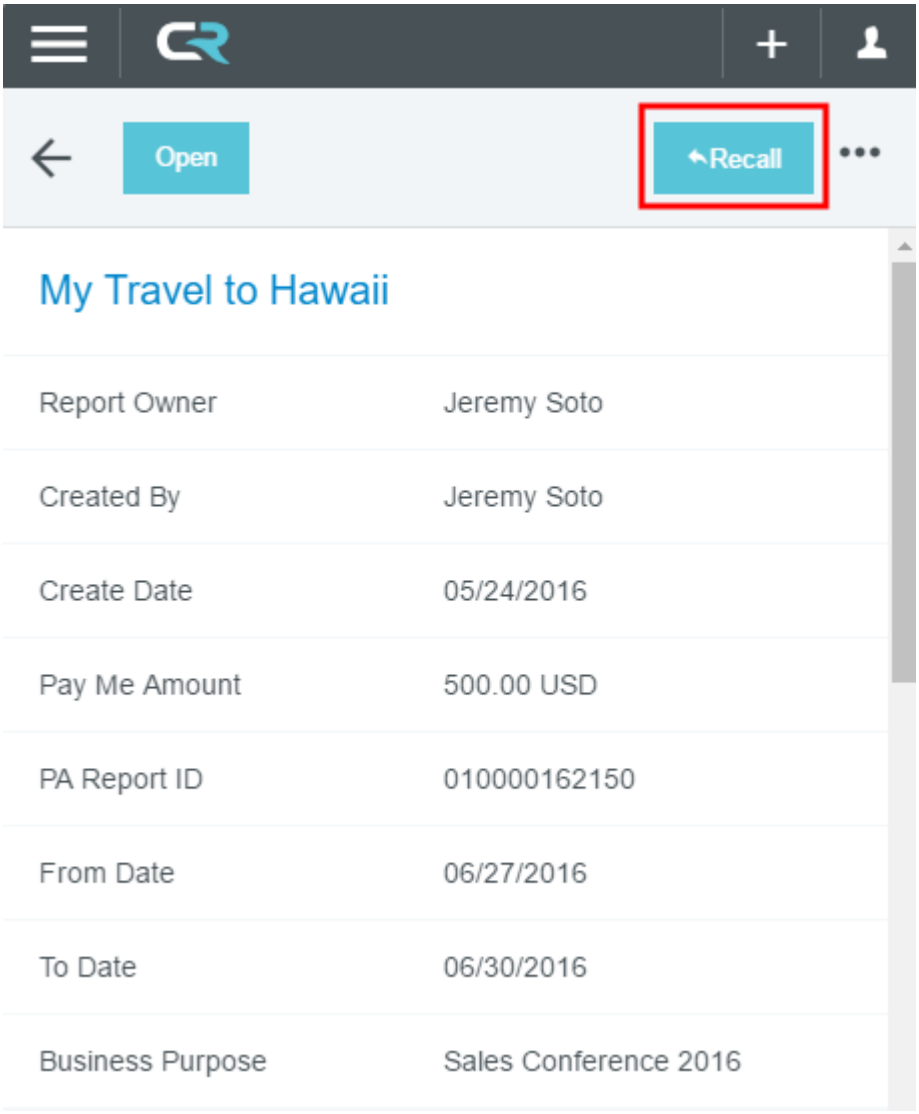
Recall Pre-Approval

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.



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

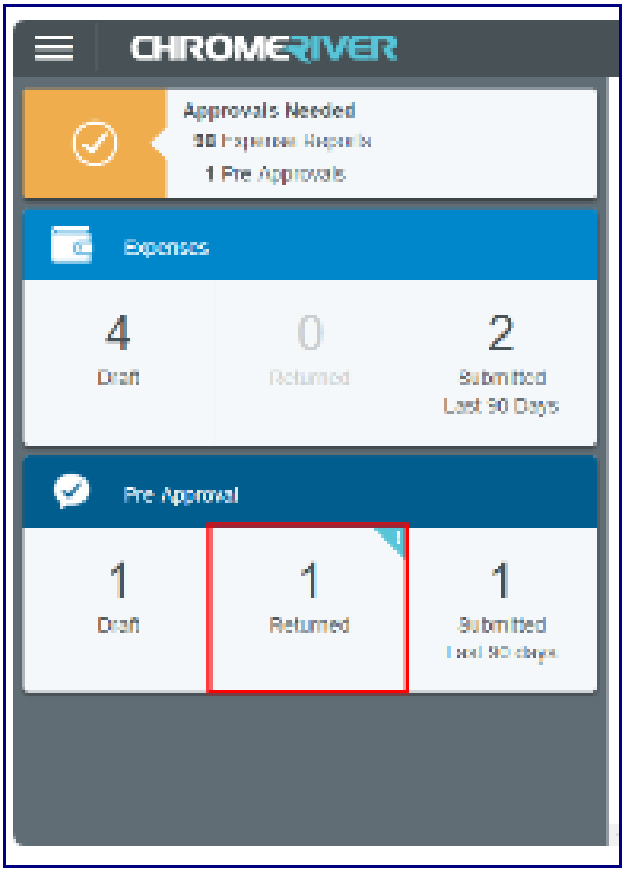


3. On the confirmation screen, tap YES. The pre-approval will become a draft and be moved to your Draft Pre-Approvals list but retain any notes that were entered during the incomplete approval process.

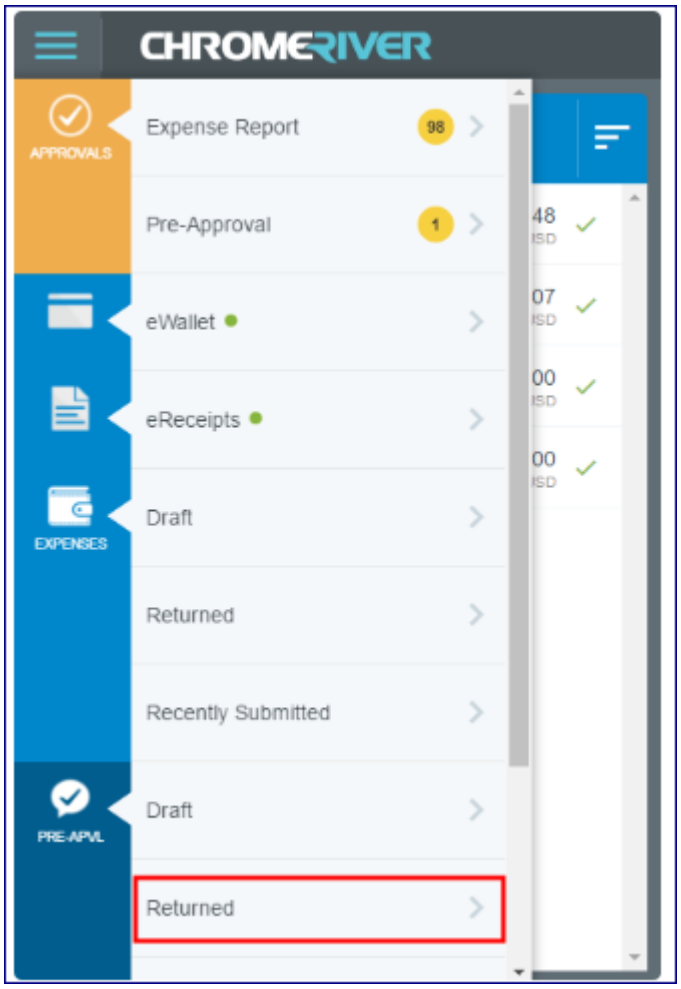
Returned Pre-Approval

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



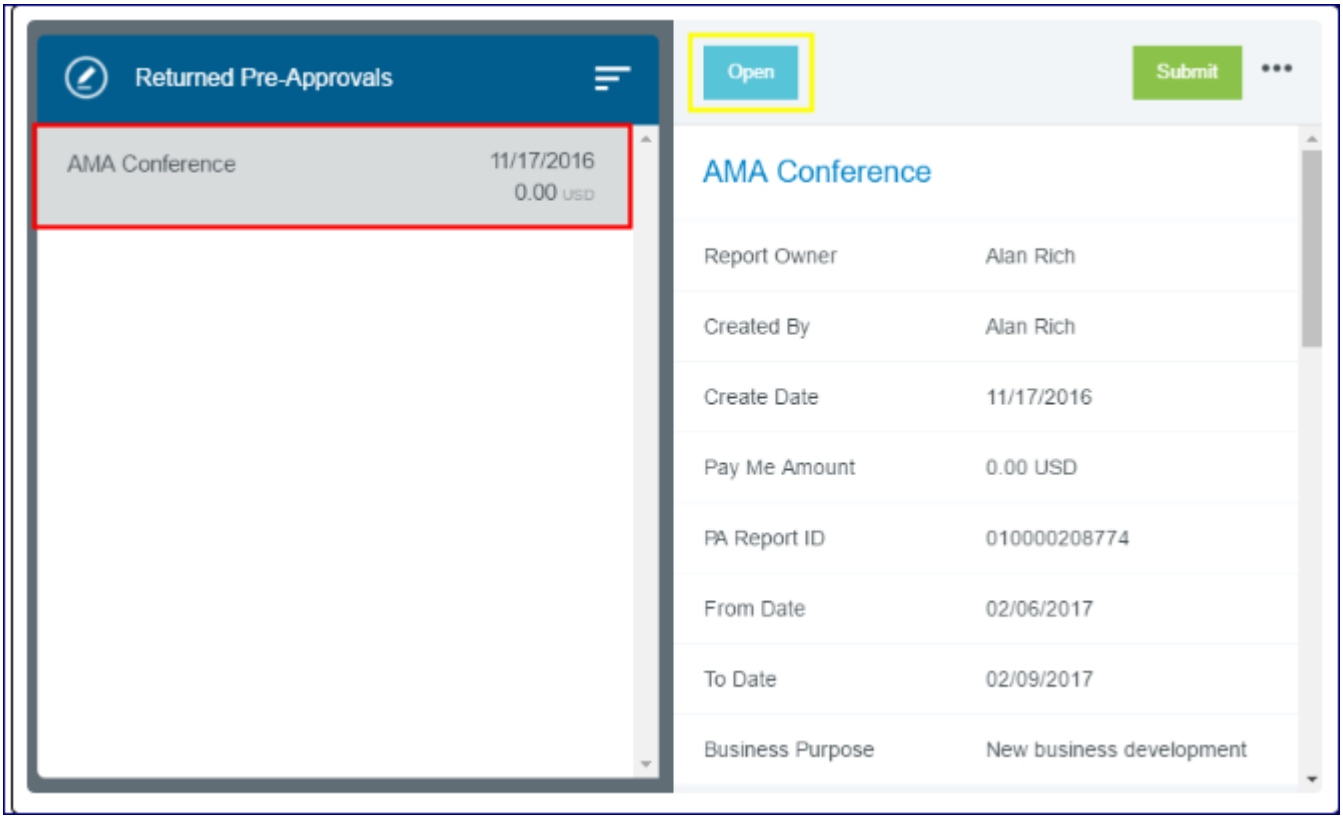
2. To access your returned pre-approvals from anywhere else in the interface, tap the **MENU** button and then tap **RETURNED** in the Pre-Approval section of the drop-down menu.



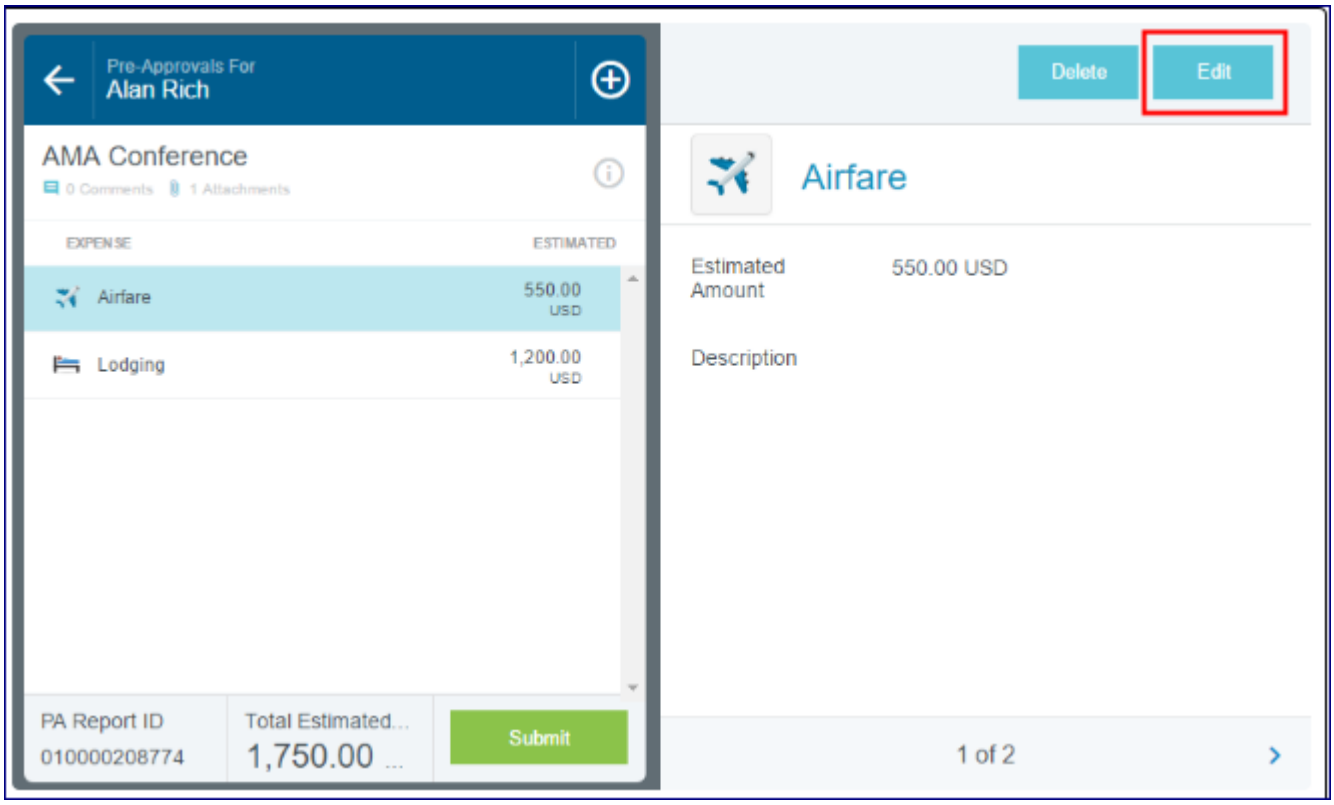
Editing Returned Pre-Approval

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

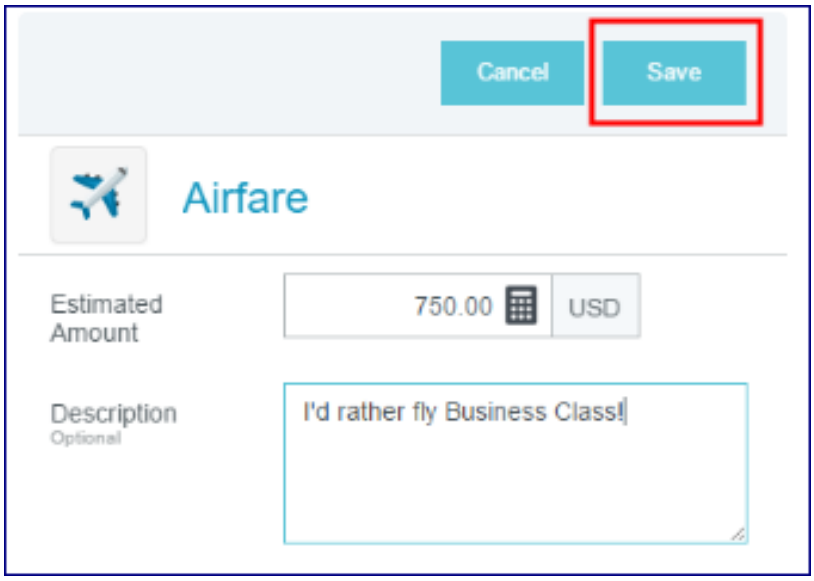
Or just double-tap on the pre-approval in the list to open it.



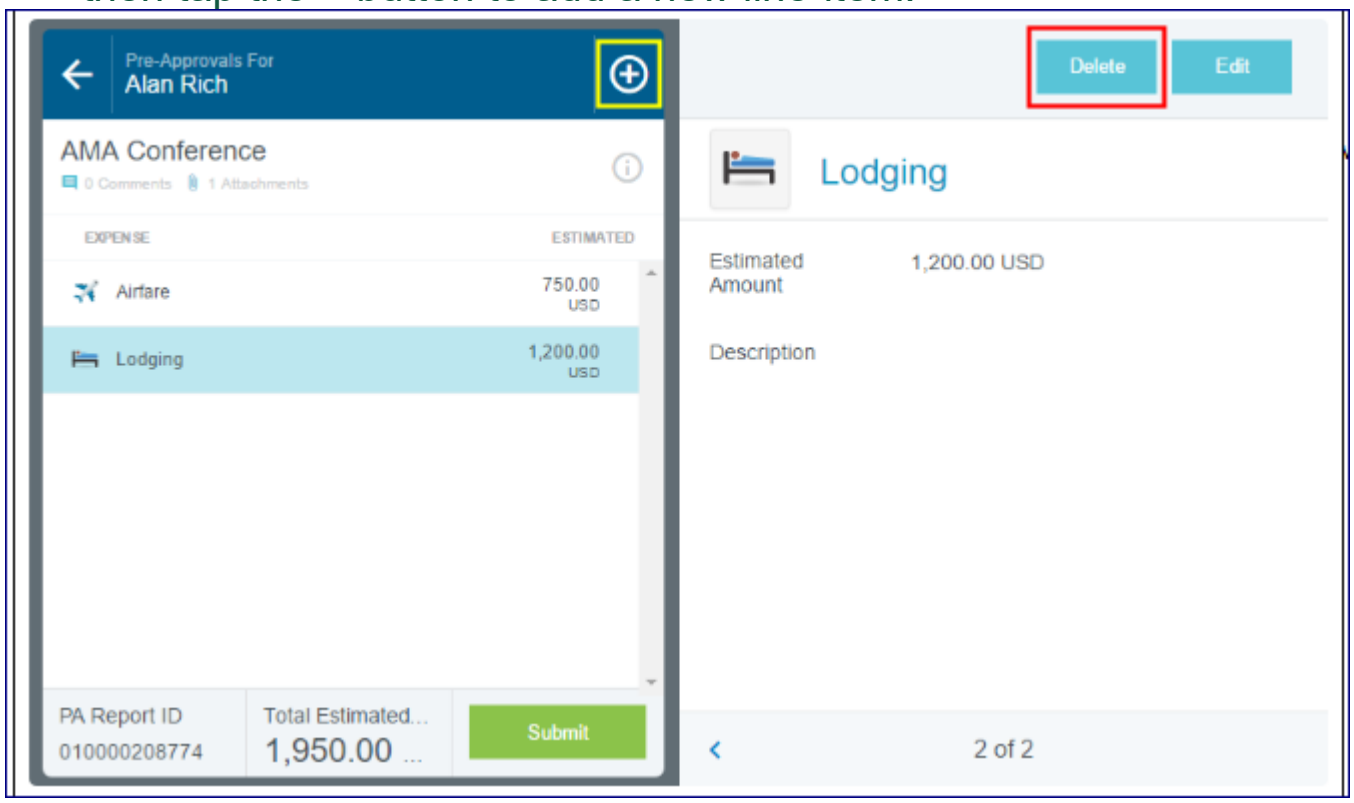
2. Select the line item you wish to adjust and tap **EDIT.**



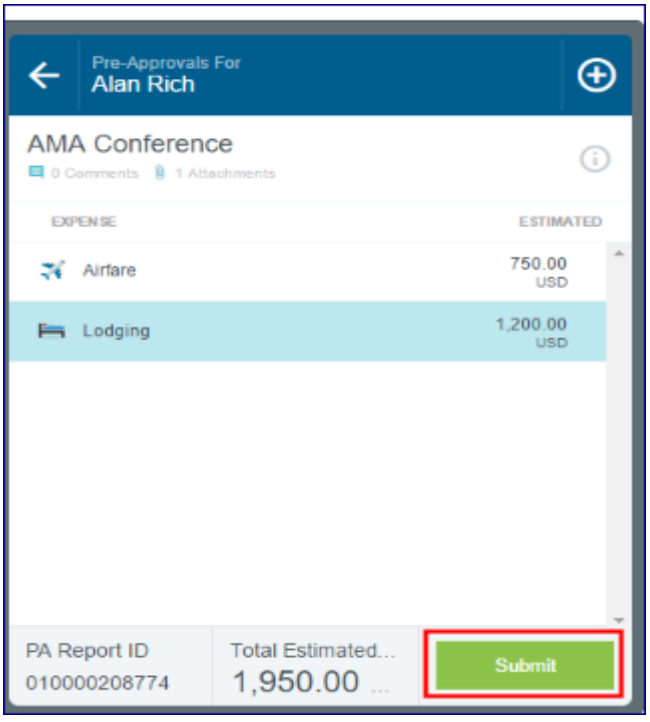
3. Change the amount, enter a Description, if desired, and tap **SAVE**.



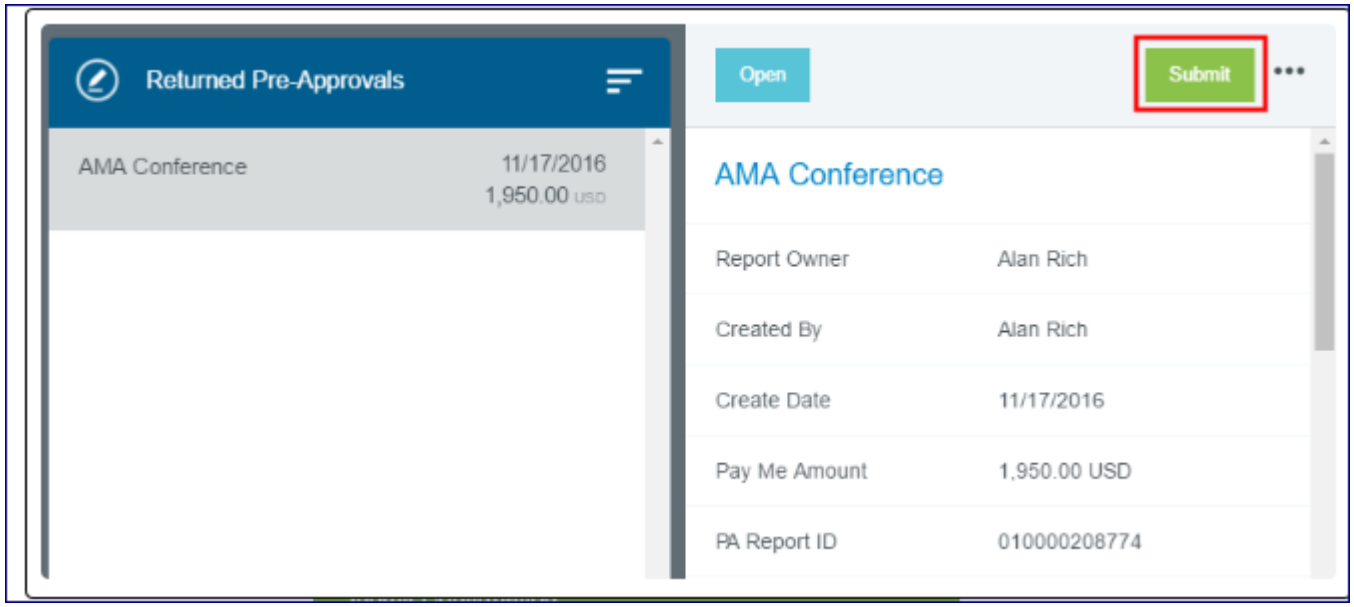
4. To delete the line item and create a new one, tap **DELETE**, then tap the + button to add a new line-item.



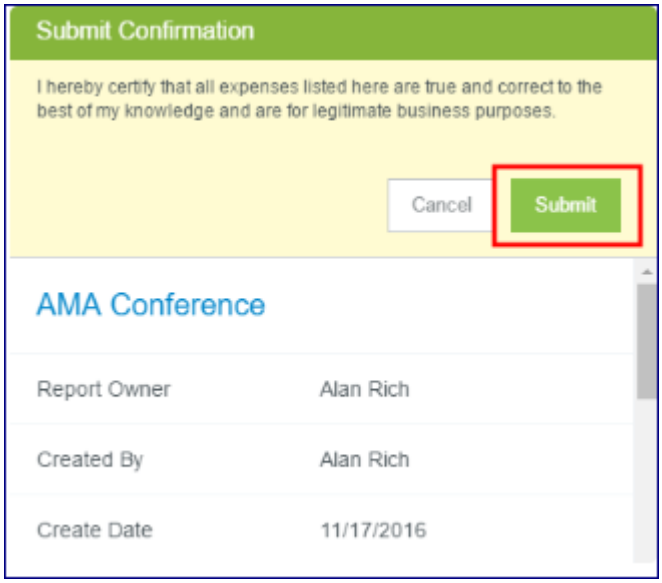
5. When you are ready to resubmit the pre-approval request, tap the green **SUBMI**T button from within the returned request.



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.

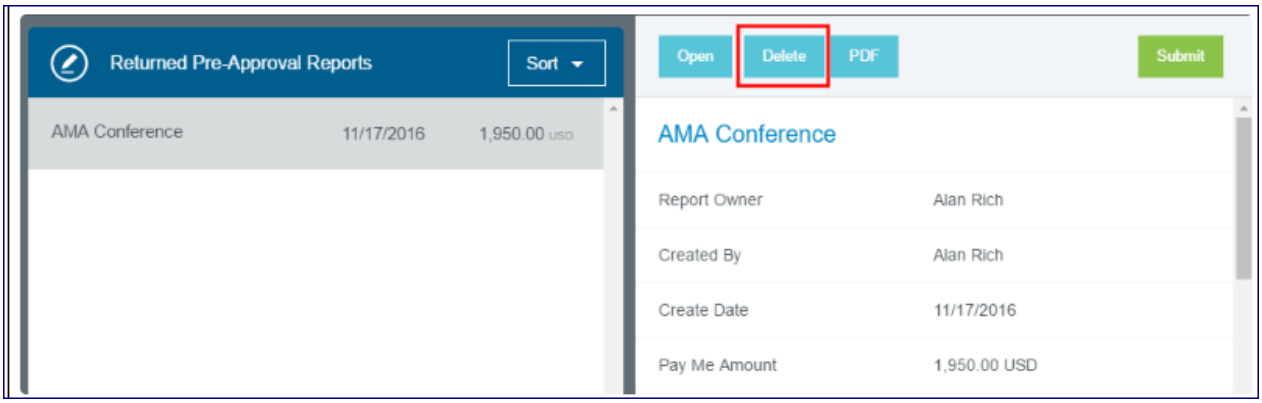


6. On the Submit Confirmation screen, tap **SUBMIT**.

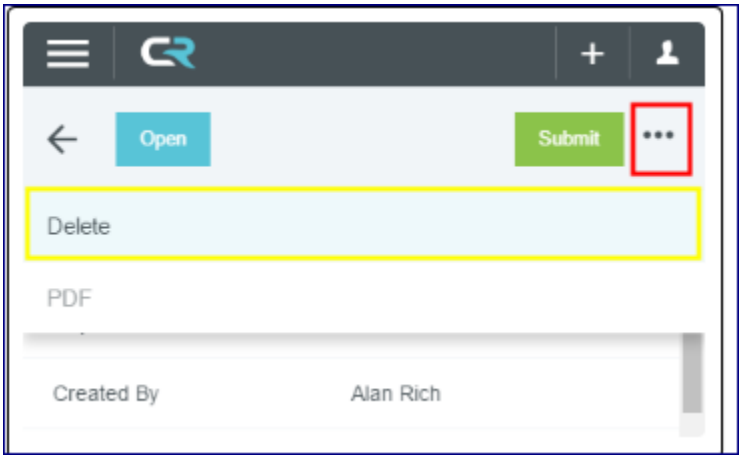


Deleting Returned Pre-Approval

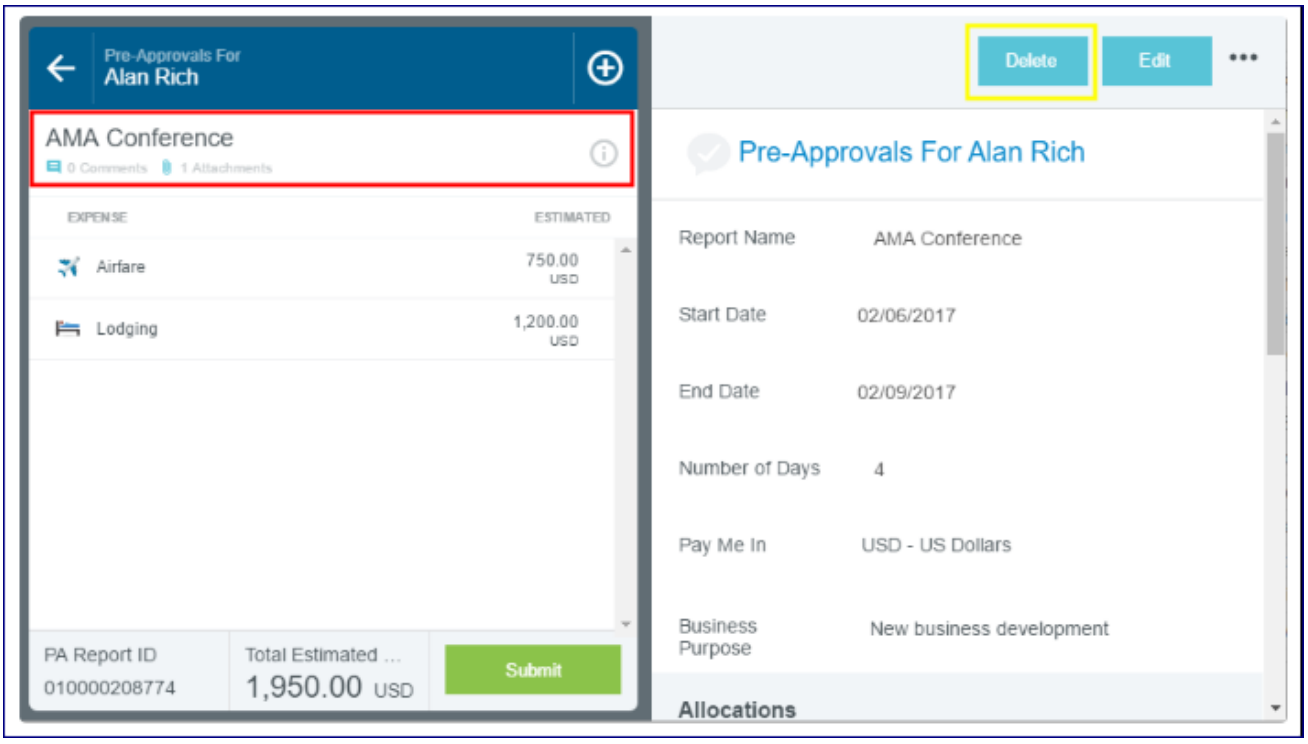
1. To delete your entire pre-approval request and start over, tap it in the Returned Pre-Approval Reports list to open the preview, and then tap **DELETE**.



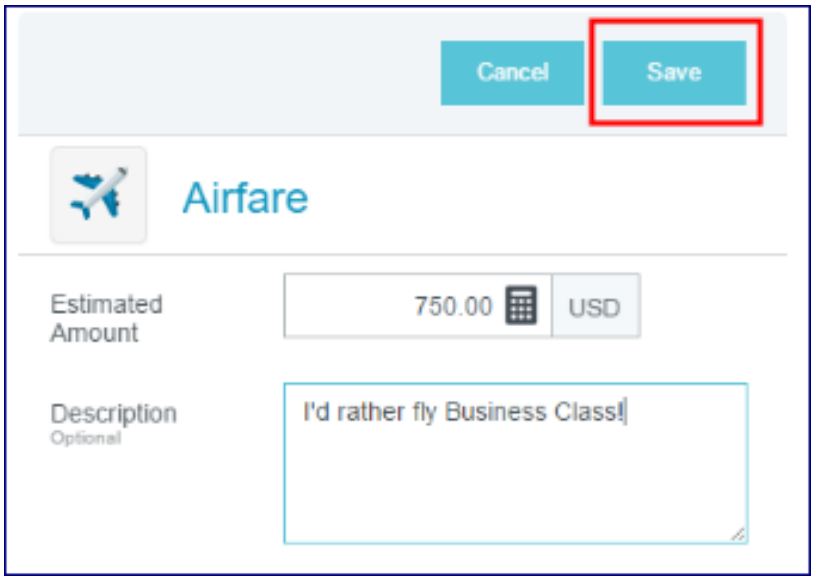
2. On narrow-screen devices, **DELETE** will be found under the three-dots drop-down menu.



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

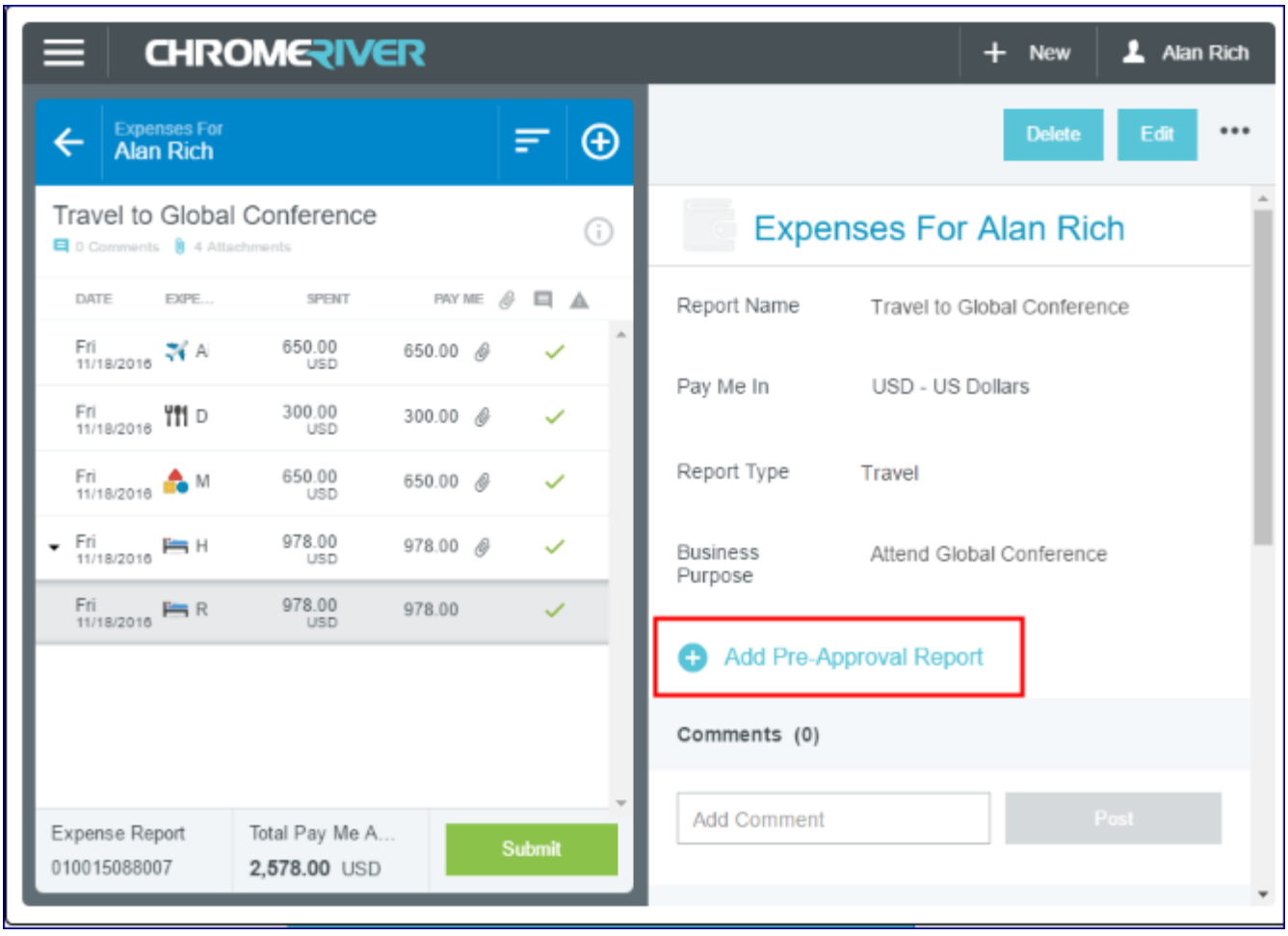


4. You will be asked to confirm the deletion. Tap **DELETE**.

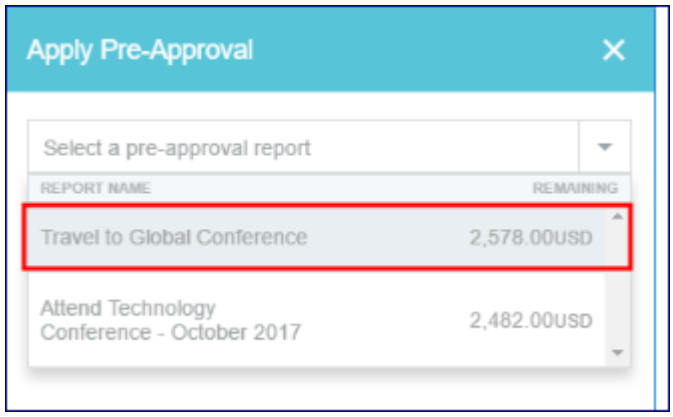


Attach Pre-Approval

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.**



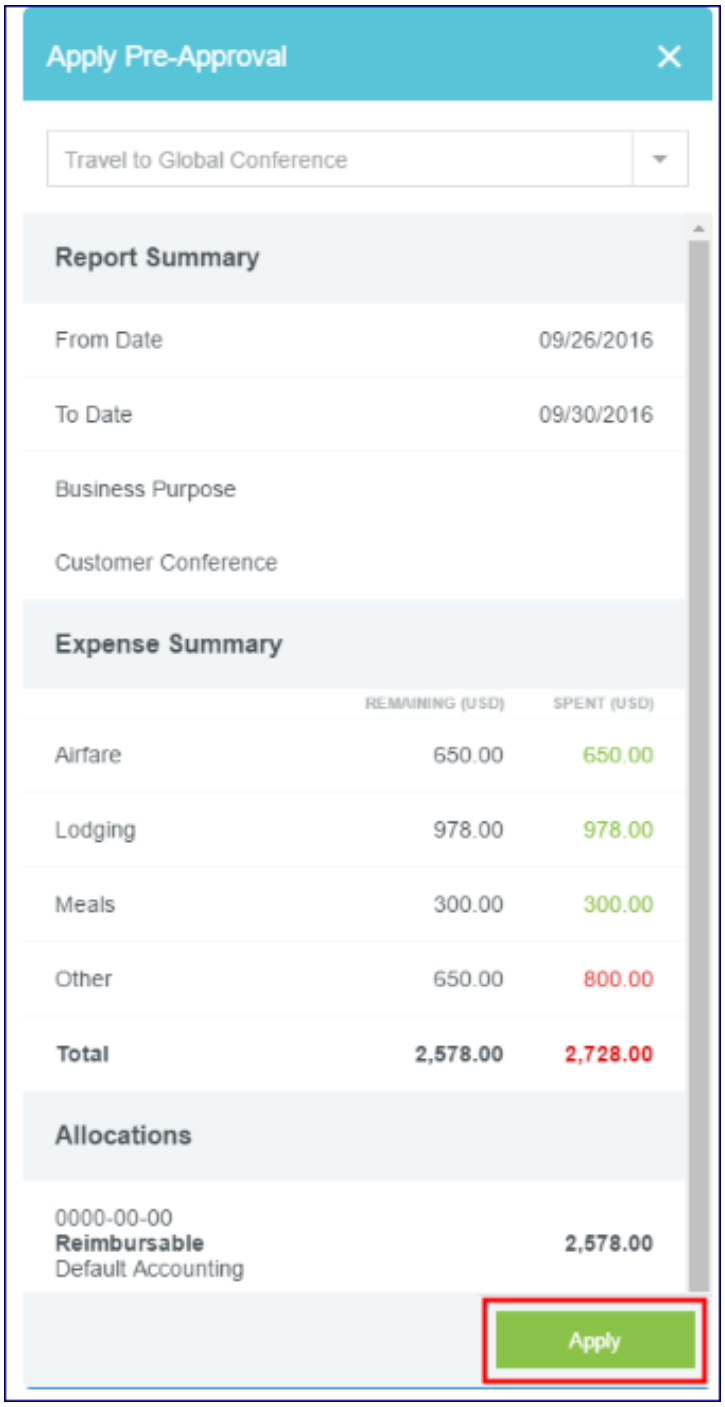
2. On the Apply Pre-Approval screen, tap the **Select a Pre-Approval Report** drop-down and then tap on the corresponding pre-approval request.



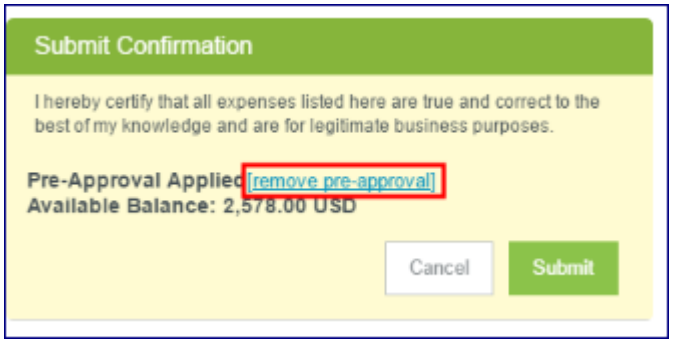
3. Be sure that all expenses related to the pre-approval are on the expense report. A pre-approval may only be used once.

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.

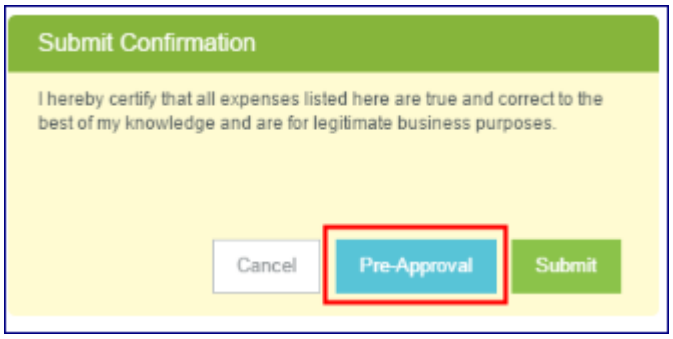
Tap **APPLY** to attach the request to your expense report.



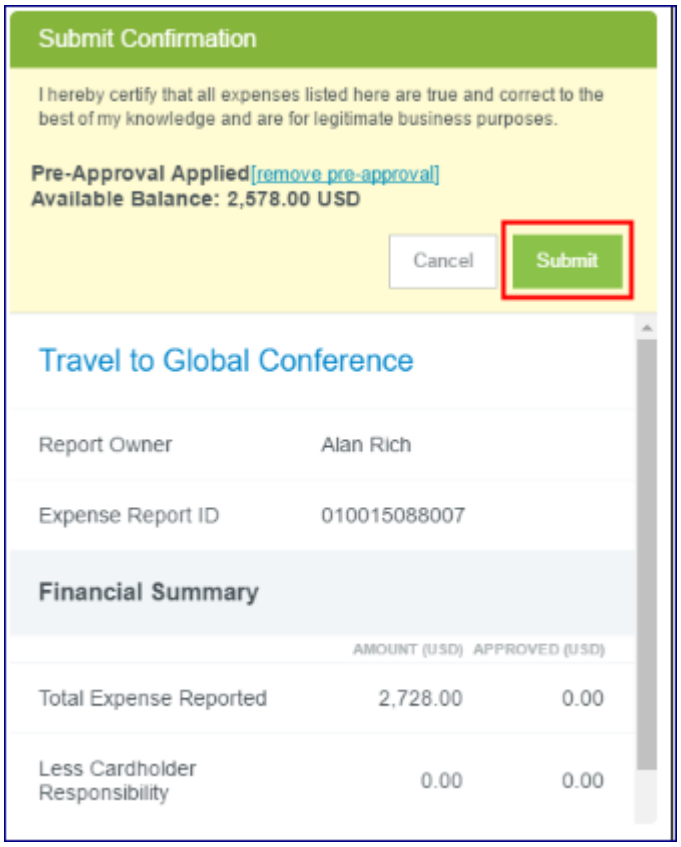
4. You will be asked to confirm that the expenses are correct. The Submit Confirmation screen also displays the pre-approval request's available balance and gives you the option to tap **REMOVE PRE-APPROVAL** if you no longer wish to attach it.



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**.

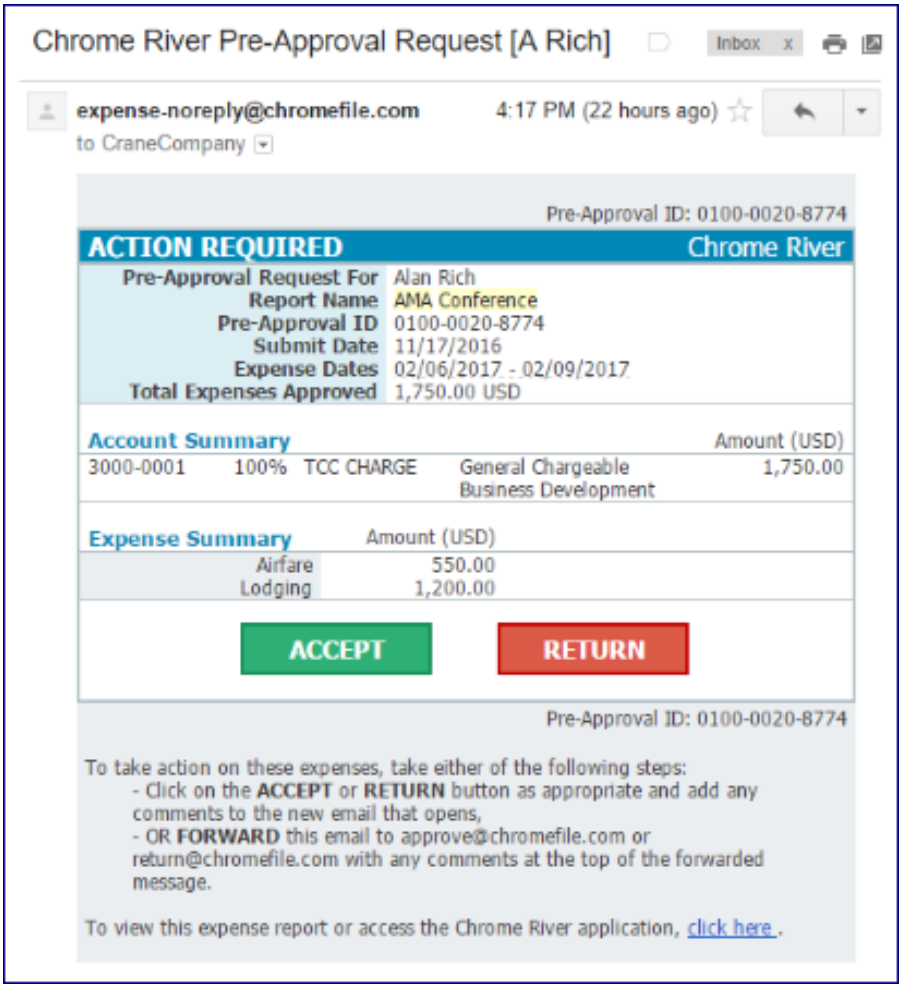


Detaching Pre-Approvals

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

ACTION REQUIRED 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

Account Summary

				Amount (USD)
3000-0001	100%	TCC CHARGE	General Chargeable Business Development	1,750.00

Expense Summary

	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 or 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.