INTRODUCTION

Approving Expense Reports and Pre-Approvals covers how to access, approve, and return Pre-Approvals. In addition, it also covers how to adjust and return line items on an Expense Report. We recommend this training for Approvers and Administrators.

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BEST PRACTICES

- Training Camp Registration Link: www.chromeriver.com/training/registration
- Prerequisites: Attend the Creating and Submitting Expense Reports training.
- Additional Training: Approvers and Administrators may attend Configuring Company Settings.

APPROVING EXPENSE REPORTS AND PRE-APPROVALS

You will receive an email notification when an Expense Report or Pre-Approval is sent to you for review.

1. APPROVAL RIBBON

The Approval Ribbon is on the top left of the Chrome River home page and shows the number of Expense Reports and Pre-Approvals that need your attention.

Expense Reports/Pre-Approvals - Click on the number of Expense Reports or Pre-Approvals needing your attention. For each report, you will see the:

- Expense Owner
- Report Name
- Report ID
- Date Submitted
- Amount
- Currency Code

SEARCHING FOR REPORTS

Located above the list of reports, the Magnifying Glass is used to search for a specific report.

- Search by the Report ID or Expense Owner.
  - If you choose to search by Report ID, you will need the full 12-digit number.
- Search for reports using the Sort button. The three lined icon in the top middle of the page. You can search by:
  - Date
  - Last Name
  - Amount
  - Assigned Date, etc.
CUSTOM SEARCH FILTERS
- Click +Create New Filter at the bottom of the Sort list.
- Enter Filter Name.
- Add Filter Type.
- Click Save.

2. REVIEWING EXPENSE REPORTS VIA THE PREVIEW Pane
Click once on the report to open its preview pane on the ride side of screen.
- Submit Compliance warnings will appear at the top. If the report has any line item Compliance Warnings, you will need to open the individual line items.
- User Profile Card – The person icon next to the Report Owner’s name shows their title, email address, currency and who they report to.
- See More – Displays any roles this person performs.

Below the Report Owner you will see:
- Submit Date – Date the report was submitted.
- Expense Report ID - A 12 digit unique id.
- Business Purpose – Purpose of the trip.
- Rule Description – Reason for why you received this approval.
- Financial Summary – Breaks down the total expense by personal charges or organizational-paid expenses.
- Expense Summary - Shows all the line items on the report.
- Account Summary - Shows the allocations selected for each expense.
- Comments - Allows you to add a comment that will apply to the entire report.

3. APPROVING EXPENSE REPORTS
- Click on the Approve button at the top.
- The system will ask you to approve one more time. The report will now go to the next approval step.

4. RETURNING EXPENSE REPORTS
- Click on the Return button at the top.
  - A return comment is required.
  - If you click Return from the preview pane, you will be returning all the line items on that report to the expense owner.

☑️ The return comments section is a great opportunity to educate users on their organization’s policies and procedures.
5. REVIEWING EXPENSE REPORTS BEYOND THE PREVIEW PANE

Double click on the report in the Approval Ribbon or click the Open button in the Preview Pane to review individual line items.

- **PDF button** - Displays the PDF report for these expenses with varying levels of detail.
- **Tracking Button** - Shows where in the approval process the report is.
- **Ellipses** - Depending on how large your browser window is, the Reassign button may appear after the Approve button or it may be hidden behind in the ellipses.
- **Reassign** - Lets you move the report to another person’s approval queue.
  - Once you have moved the approval, a best practice is to enter any notes about why you have reassigned the approval to them.

6. ADJUSTING LINE ITEMS ON EXPENSE REPORTS

- Open the Expense Report.
- Click on the line you are adjusting. You need to enter a note explaining what you adjusted and check the Notify Expense Owner Checkbox.
- When you click **Adjust**, there are three things you can change:
  - **Approved Amount** (can only adjust down)
  - **Business Purpose**
  - **Allocation**
    - If needed, you can also attach an image.
- Click **Save**.

7. RETURNING LINE ITEMS ON EXPENSE REPORTS

- Open the Expense Report
- Click on the line you are returning.
- Click **Return**. You are required to enter a comment explaining why you are returning this line item.
- Click **Save**.

*Please Note*: When you click **Save**, the item is only marked as returned. The item returned only when the green **Submit** button is clicked.

8. REVIEWING PRE-APPROVALS

The process is just like approving expense reports, though you cannot approve or return individual line items, only the entire pre-approval request.

- Click once on the **Pre-Approval** to open its preview pane on the ride side of screen.
Approving Expense Reports

- Click Open. On the left is the list of potential line items the expense owner expects to have. On the right are all the details of the pre-approval request.
  - Comments Box - If you want to add a comment, you can put one in the Comments box.
  - Attachments section - At the bottom of the page, the expense owner may have attached other types of supporting documentation on the pre-approval header.
- Click Approve.
  - If there is anything questionable about the request, you will need to click the Return button to send the entire Pre-Approval back to the expense owner. Explain any issues in the required Return Comment box, then click Return again to send back the pre-approval request.

9. APPROVING EXPENSE REPORTS AND PRE-APPROVALS VIA EMAIL

One of the convenient features of Chrome River is the ability to approve or return expenses and pre-approvals directly from the notification email you receive when you are assigned an approval—you do not even have to open the application. In the notification email, you can:

- Click the Accept/Return buttons.
- Enter Comments - These will show up under the Comments section on the Expense Report.
- Click on the View Receipts link to view the receipts.

The approval emails for pre-approvals look similar and have the same Accept / Return buttons with comments functionality. There is no View Receipts link on the pre-approval email.

OTHER RESOURCES

- Live Customers – Can submit a case to the Help Desk.
- Implementation Customers – Follow-up with their Chrome River Project Manager or see the Chrome River Training Camp website.

NEXT STEPS

After completing this training, here are some additional steps you can take:

- Download the Chrome River application (See Chrome River under the MOBIL.E section in the Help Center).
- Use the Help Center to find answers to any questions you come up with.
**QUESTIONS**

Write your questions down here for our *Support Team* or your *Customer Success Manager*.

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