

APPROVING P-CARD EXPENSE REPORTS FROM WITHIN THE CHROME RIVER TOOL

PCard Expense Reports will show up in the Approvals swim lane. This swim lane is also used for Travel Expense Reports and PreApprovals, so this is why it is important to properly name your reports so that the individual performing approvals can see what it is they have for approval.

The screenshot shows the Chrome River dashboard with the following components:

- Approvals Swim Lane:**
 - APPROVALS:** 1 Expense Reports, 0 Pre-Approvals
 - EXPENSES:** 1 Draft, 0 Returned, 0 Submitted (Last 90 days)
 - PRE-APPROVAL:** 0 Draft, 0 Returned, 1 Submitted (Last 90 days)
- P-Card Information Page:**
 - Introduction:** As part of the university's efforts to go green, we are very excited to introduce the new Sam Houston State University Travel and PCard reconciliation system, Chrome River!
 - Chrome River benefits include:**
 - Electronic submittal of Travel Requisition (pre-approval process)
 - Electronic submittal of Travel and P-card expense reports
 - Receipts may be scanned to the tool or a picture uploaded from your mobile device (submitted and approved electronically).
 - Secure online paperless environment
 - Approve travel and expense reports from anywhere using your laptop, tablet, or mobile device
 - Monitor the status of the reimbursement process from your computer
 - CONTACT INFORMATION:**

Travel & Expense	Maribeth Bates	X41960	mx0005@shsu.edu
Travel & Expense	Roz Kieschnick	X43314	rk0005@shsu.edu
PCard		X41991	steupcard@shsu.edu
 - LINKS AND FORMS:**
 - Travel Policy
 - PCard Policy
 - PCard Forms
 - REMINDERS AND HELP:**
 - Emailing receipts to your Chrome River account:
 - You have an option to email any receipt to receipt@chrome.river.com. Please make sure to send the email from the email account that is registered online so the system can recognize and store the receipt in your account. The receipt will then be available within your Receipt Gallery.
 - Links to full HELP tutorials through Chrome River:
 - Quick Start: Creating a New Expense Report
 - Quick Start: Expense & Invoice Approvals

If you click on the number of Expense Reports pending approval you will see a screen like the one below listing all of the pending approvals for your action.

The screenshot shows the Chrome River dashboard with the following components:

- Approvals Swim Lane:**
 - APPROVALS:** 1 Expense Reports, 0 Pre-Approvals
- Expense Reports List:**

Expense Reports	Pre-Approvals		
Tidwell, William PCard Procurement May 2018 <small>05/14/2018</small>	05/14/2018	\$14.60 <small>USD</small>	

Select the report you wish to approve and click on it to review in more detail. Choose the Open tab to open the entire report for detail viewing.

The screenshot shows the Chrome River interface with the 'Approvals Needed' section on the left. The main content area displays the 'PCard Procurement May 2018' report. At the top right, there are buttons for 'Open', 'PDF', 'Tracking', 'Return', and 'Approve'. The report details include:

- Report Owner: William Tidwell
- Submit Date: 05/14/2018
- Expense Report ID: QA0024705654
- Rule Description: Delegate Submits ->Expense Owner Approves - All Expense Reports must be approved by the Expense Owner.

The 'Financial Summary' table is as follows:

	AMOUNT DUE	APPROVED DUES
Total Expense Reported	914.60	914.60
Less Cardholder Responsibility	0.00	0.00
Less Company Paid Expenses	914.60	914.60
Less Company Paid Personal Expenses	0.00	0.00
Less Personal Expenses	0.00	0.00
Amount Due Employee	0.00	0.00
Total Expenses For Approval	914.60	914.60

The 'Expense Summary' table is as follows:

	AMOUNT DUE	APPROVED DUES
Registration / Conference / Seminars - Employee	450.00	450.00
Catering	464.60	464.60

If you choose to Return the report, the system will ask for a comment that will let the originator know why it was returned for non-approval or corrections.

This screenshot shows the same 'PCard Procurement May 2018' report, but with a 'Return Comment' dialog box open. The dialog box contains the text 'Return comment is required' and has 'Cancel' and 'Return' buttons. The background report details are identical to the previous screenshot.

If you choose to Approve the report you will select the Approve Button on the top right.

This screenshot shows the 'PCard Procurement May 2018' report with the 'Approve' button highlighted in green. The report details and financial summaries are identical to the previous screenshots.

If you do choose Approve, the system will ask you to confirm by clicking Approve on the statement “I hereby approve this report”, so remember it’s a two-step process.

Approval Confirmation

I hereby approve this report.

APPROVING P-CARD EXPENSE REPORTS VIA EMAIL

NOTE: THIS SECTION IS FROM THE CHROME RIVER TRAVEL FAQ. THE PROCESS FOR APPROVAL BY EMAIL IS THE SAME FOR BOTH THE P-CARD AND TRAVEL CARD.

Email from: Expense-noreply@chromefile.com to take action on request (**Pre-Approval and Expense Reports**). Employee (traveler) is the first step in the approval process and **MUST** approve all reports.

Reply Reply All Forward IM

Fri 11/10/2017 9:46 AM
expense-noreply@chromefile.com
Chrome River Pre-Approval Request [P Allen]

To Kieschnick, Rozlynn

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

ACTION REQUIRED
Chrome River

Pre-Approval Request For	Paul Allen
Report Name	Test PA routing
Pre-Approval ID	0100-0034-5701
Submit Date	11/10/2017
Expense Dates	11/08/2017 - 11/10/2017
Total Expenses Approved	605.00 USD

Business Purpose
test

Account Summary	Amount (USD)
140100 100% 232000 Dept of Economics and Intl Business 40 - Academic Support	Designated Tuition 000000 - Default Activity 605.00

Expense Summary	Amount (USD)
Lodging	350.00
Meals	100.00
Mileage	130.00
Parking	25.00

Pre-Approval ID: 0100-0034-5701

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.

An additional email from Chrome River with action requested will pop-up once action selected. User will need to select the send button for action to apply to report. Comment is not required in the email. Simply select SEND.

Chrome River Pre-Approval Request [Paul Allen] - Message (HTML)

File Message Insert Options Format Text Review ADOBE PDF Tell me what you want to do...

Cut Copy Format Painter

Calibri 11 A A

Address Book Check Names Attach File Attach Item Signature

Follow Up High Importance Low Importance Office Add-ins

Clipboard Basic Text Names Include Tags Add-ins

From rxk006@shsu.edu

To approve@chromefile.com

Cc Bcc

Subject Chrome River Pre-Approval Request [Paul Allen]

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

Pre-Approval ID: 0100-0034-5701

A final notification email is sent to the traveler and submitter when all approvals are complete.

Reply Reply All Forward IM



Fri 11/10/2017 10:43 AM

expense-noreply@chromefile.com

Chrome River Pre-Approval Request Approved

To Kieschnick, Rozlynn

NO ACTION REQUIRED		Chrome River
The following Pre-Approval Request has been approved.		
Pre-Approval Request for	Paul Allen	
Report Name	Test PA routing	
Pre-Approval ID	0100-0034-5701	
Submit Date	11/10/2017	
Expense Dates	11/08/2017 - 11/10/2017	
Total Expenses	605.00 USD	
Notes		
11/10/2017	Rozlynn Kieschnick	approve
11/10/2017	Rozlynn Kieschnick	Approve