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Approving Expense Reports

Selecting Expense Report to Approve Inside Chrome River

If you are part of the approval process and have items awaiting your approval, you will see an orange notification bar for **Approvals Needed** at the top of the Dashboard.
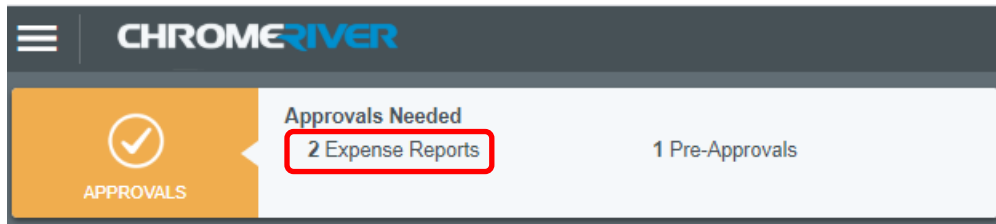
Tap on **Expense Reports**. The **Approvals Needed** list displays all the expense reports awaiting your approval.
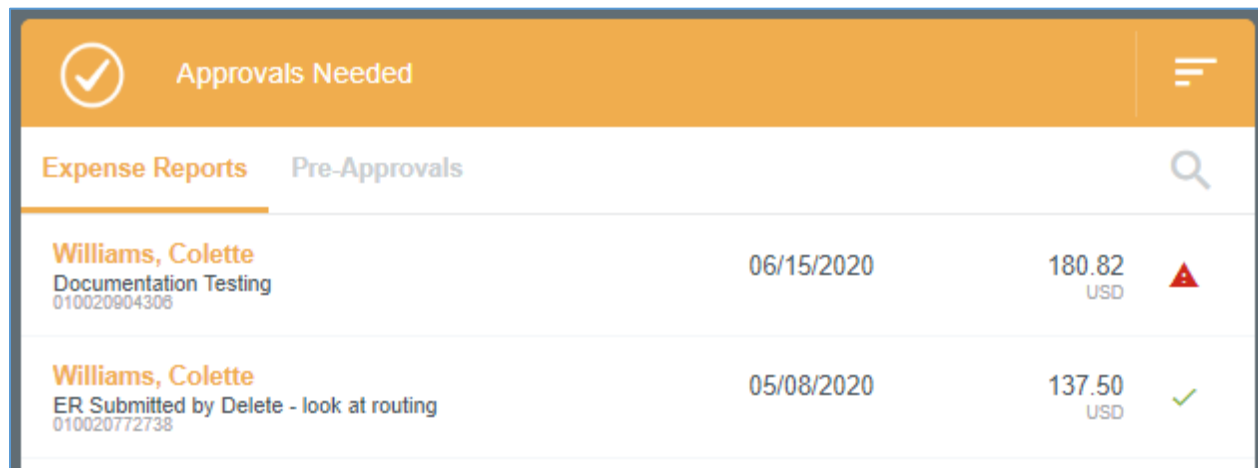
Tap on the expense you wish to view, and a preview will open on the right.

In the report preview, you can view the report details, Financial Summary, Expense Summary, Account Summary, Applied Pre-Approval Reports and Comments.

If the expense you are approving has a linked pre-approval, you may view the details by tapping the PDF download button next to the name of the Applied Pre-Approval Report. This allows you to easily compare the original pre-approval to its associated expense report.

Open	PDF ▾			Tracking	Return	Approve	•••

Financial Summary

	AMOUNT (USD)	APPROVED (USD)
Total Expense Reported	180.82	180.82
Amount Due Employee	180.82	180.82
Total Expenses For Approval	180.82	180.82

Applied Pre-Approval Report

DATE	REPORT NAME		AMT (USD)
06/15/2020	Documentation Test 1	⬇ PDF	180.82
Remaining Balance			413.53

Expense Summary

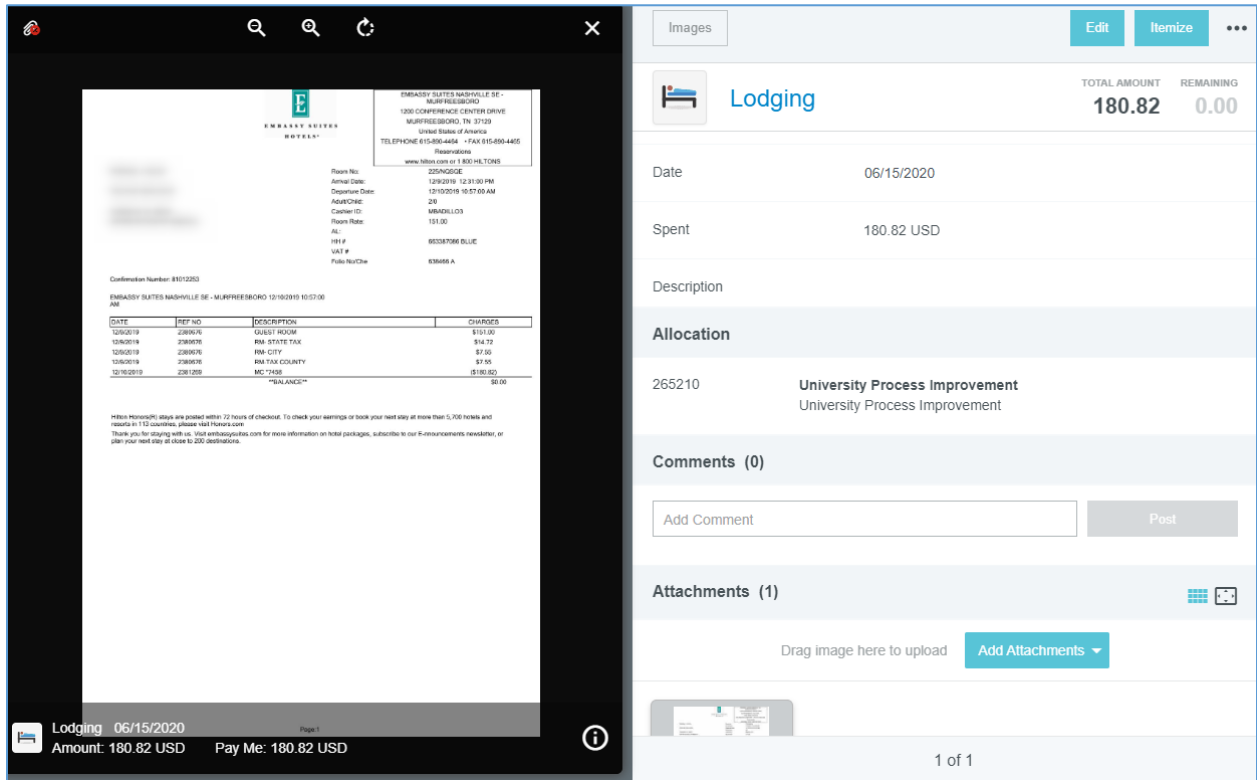|	AMOUNT (USD)	APPROVED (USD)
Room	151.00	151.00
Taxes & Fees	29.82	29.82
Total	180.82	180.82

Approve from inside the expense report

Double click on a report in the Approvals Needed list to open it or click on the report and then click **Open**.

Expenses will be listed on the left side of the screen. To view details of an expense, click once on the expense and the right side of the screen will display the details, including receipts.

Click on each expense line item to view the details.

On the expense entry item, click on **Images** to see the Receipt image and expense information side-by-side on the same screen.

For lodging expenses, click on the parent expense entry line to view the itemized entry lines.

After you have reviewed the report and are ready to approve, click the **Submit** button at the bottom of the expense list.
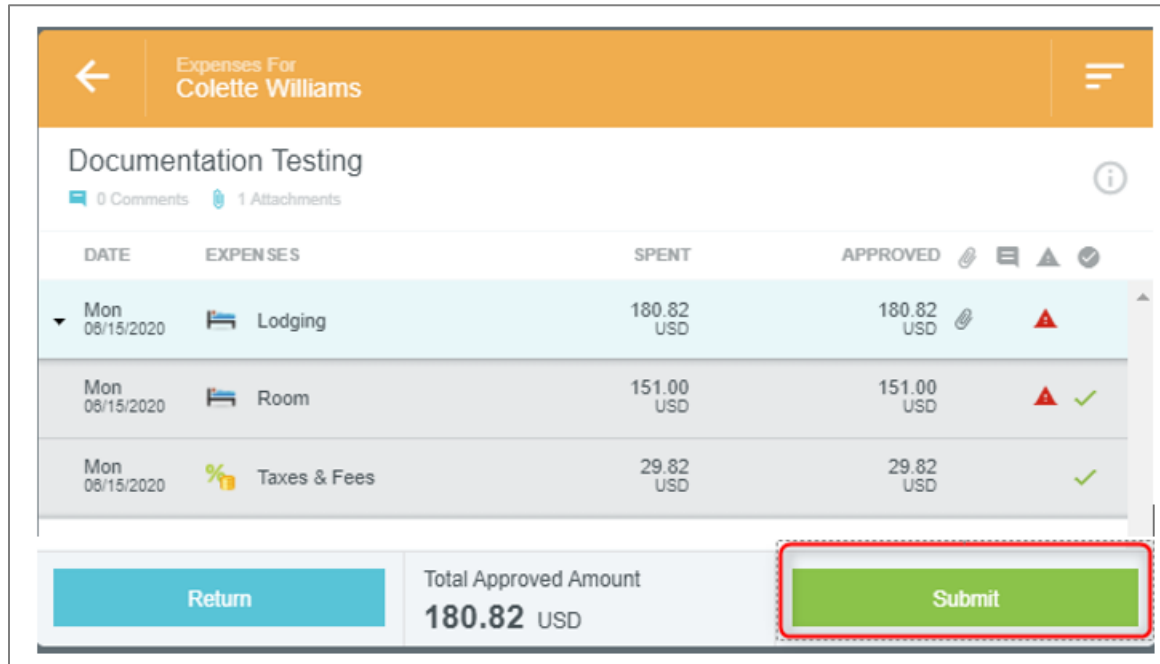
After clicking **Submit**, a submit confirmation will be displayed.

On the Submit Confirmation window, click **Submit** to move the expense report to the next approval routing step.
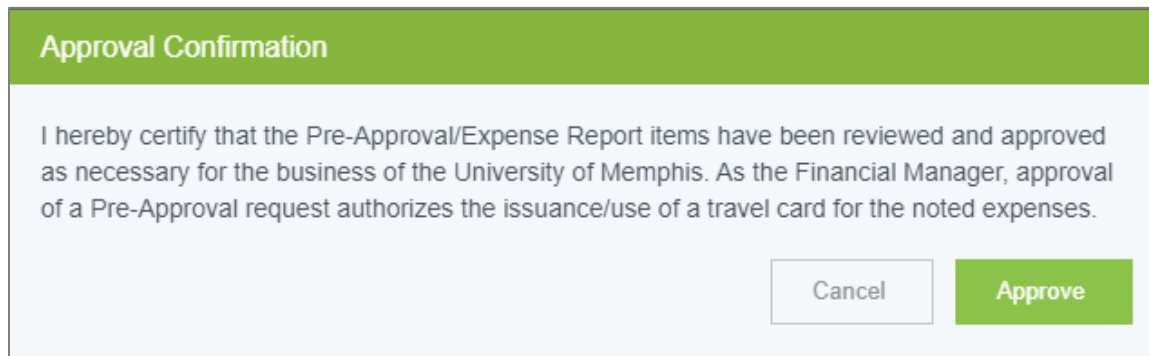
NOTE: The approval function within a report is indicated using the Submit button due to the system needing to recalculate the report in the event there were adjustments made by the approver. Once the Submit button has been clicked, the Submit Confirmation screen will appear.

If there is a discrepancy, request the expense owner to perform a **Recall** action.

Approving an Expense Report by Email

Chrome River will email approvers expense reports requiring their approval. Approvers have the ability to approve all expenses on the report for payment or return all expenses on the report to the expense owner with questions or comments from within the email. Approving or returning specific line items within an expense report requires the approver to log in to the Chrome River application, which can be done through the link at the bottom of the email.

The email approver receive includes most of the details of the report, including the ability to view receipts associated with each expense. At the bottom of the email, approvers can view an expense summary and will see **APPROVE** or **RETURN** buttons.

ACTION REQUIRED		Chrome River

Expense Report for	**Shruti Bapat [Business Process Analyst]**
Report Name	**test for Colette**
Submit Date	**07/29/2022**
Expense Dates	**07/29/2022 – 07/29/2022**
Total Expenses	**100.00 USD**

Account Summary		Amount (USD)
265210 University Process Improvement	University Process Improvement	100.00

Pre-Approval Summary	Estimated (USD)	Submitted
Miscellaneous / Other	100.00	100.00
Totals	100.00	100.00

Expense Details

07/29/2022	Miscellaneous / Other	University Process Improvement	100.00 USD
	265210	University Process Improvement	
Business Purpose			Test
Description			test test test test
Reason Assigned			Review for Approval
Receipts			View

Financial Summary	Amount (USD)
Total Expense Report	100.00
Less Company Paid	0.00
Amount Due Employee	100.00
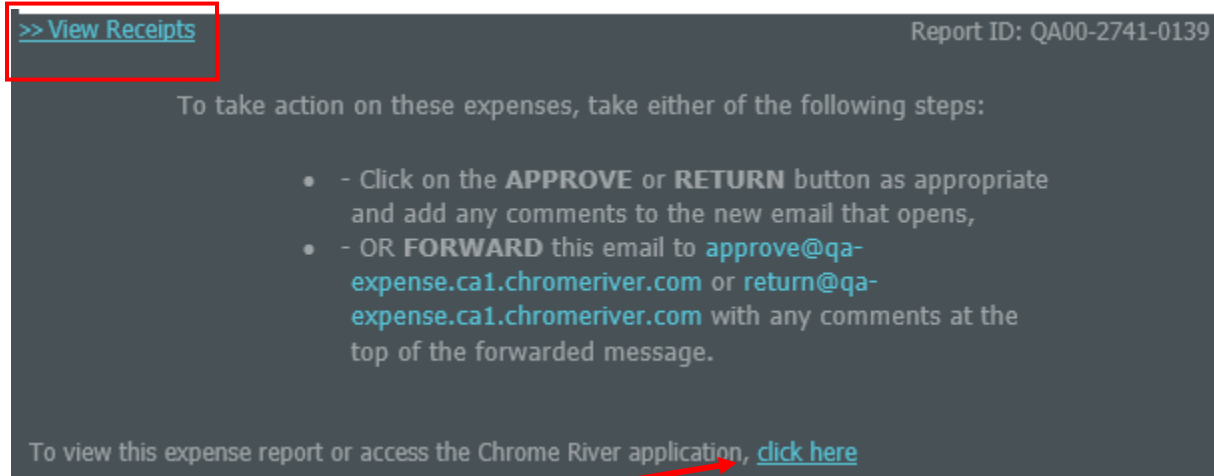
Expense Summary	Amount (USD)
Miscellaneous / Other	100.00

APPROVE   RETURN

Note that at the bottom of the report you can click the **VIEW RECEIPTS** link to view a PDF of all receipts attached to the report. (Expense Reports only).

Tap the **View** link in the Expense Details section at the bottom of the email to be taken directly to the report in the Chrome River app.

To approve a report by email, click the **APPROVE** button. This will bring up a new email window that you will need to **SEND**. (If when clicking the **APPROVE** button, an email window does not automatically open, you can forward the email to approve@ca1.chromeriver.com). This email must be sent from your MEMPHIS email address. If you have any comments you would like to include on the report, you can type them into the body of the email before sending, and they will be added to the report. (This is optional). Once you hit send, the system will be notified of your approval, and the report will move forward in the approval queue.

Return for Correction

To return the report, click the **RETURN** button. This will also bring up a new email window that you will need to **SEND**. You can enter an explanation for why you are returning the report that will be provided t the report submitter. Once you hit send, the system will return the report to the submitter for corrections. If an approver returns a report, the resubmitted report will route back to the same approver and will not require additional approval from previous approvers, if applicable.

Approve from Expense Report Preview within the Chrome River application

UofM **recommends** approvers to review the full details of expenses, including receipts, prior to approving a report. Using the approve function from preview should be limited to expense reports that contain one or two expense items, and don't have expense details that need to be reviewed.

Clicking Approve **immediately approves** the report. Once the approver has confirmed the approval and clicks the second Approve button, the entire report will move to the next step in the approval process.