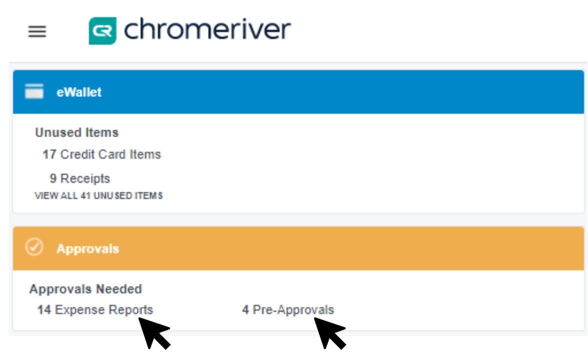
Approval Basics

- Approvers will receive email notification informing that a pre-approval or expense report has been sent to them for approval.
- Reports can be approved or returned directly from the email or from within the application. Most details of a report are contained in the email, including receipts; however, the ability for an approver to adjust a report is only available from within the application.
- Reports will be routed automatically to additional reviewers based on the routing rules set in the system.
- If an approver in the chain returns a report and the report is resubmitted by the expense owner, it will route back to the approver that returned it; the report will not require approval from previous approvers.

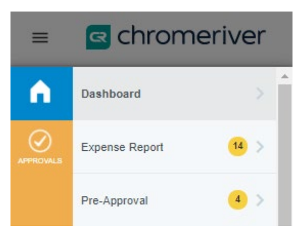
Approvals from within the Chrome River application

A yellow notification bar near the top of the Dashboard will indicate that you have reports that are awaiting your approval.

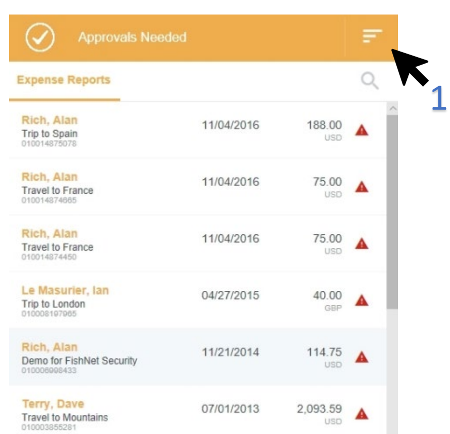
1. Click the link to see the Approval List.



You may also access your approvals by clicking the **3-bar menu** button and selecting Approvals/Expense Report or Approvals/Pre-Approval, as applicable. The yellow circle shows the number of approvals waiting for you.



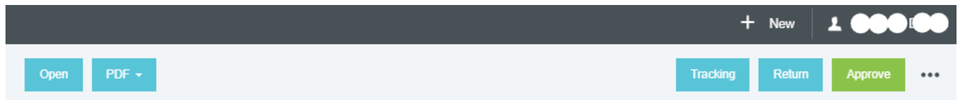
Once in the Approval List, you will be presented with a list of reports awaiting your approval.
You can use the **Sort** button in the top right-hand corner (1) to sort the list by Date, Last Name, Amount, or Status.



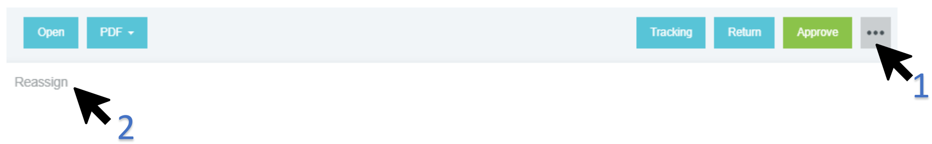
2. Click once on the report you wish to review.
   A preview of the report will appear on the right side of the screen.

From preview you can perform the following functions:

- Open the report
- View/Print the report as .pdf
- View the tracking of the report
- Return the report
- Approve the report



Additionally, you can Reassign the report to another approver.
Note: by reassigning the report, the assignor relinquishes their approval authority for the report.



Preview Screen Actions

Approve Report

- Viewing report details in the preview screen is limited. MSU advises 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.

Return Report

- Clicking **Return** immediately rejects all line items on the report. Once the approver has entered the required comment and clicks **Return**, the entire report will be sent back to the expense owner and they will be notified via email.

NOTE: The option to return a report is available via email or from the preview screen. You should first review the report in its entirety by opening the report. If you wish to return the entire report, you will need to return to the preview screen.
NOTE 2: Returning a report is not available within the report itself. From within the report there is the ability to return a single line item.

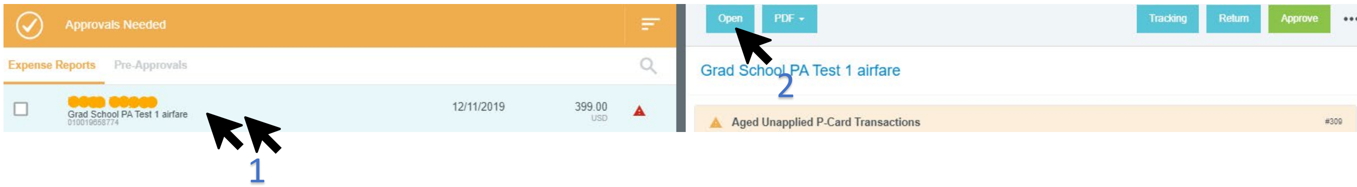
Reassign Report

- Click to search for another approver to send the expense report to for approval and insert the reason in the **Item Notes** field.
- Click **Reassign** to send the report. The approver to which you have reassigned the form will receive an email notification and the notes within the report will indicate the reason it was reassigned.

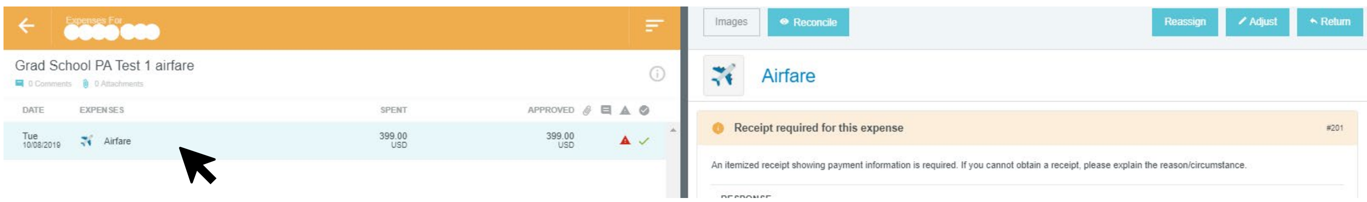
NOTE: The Reassign feature is only available within the application. You cannot reassign via email.

Actions within the report

Double-click on a report in the **Approvals Needed** list to open it (1) or click on the report and then click **Open** (2).



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.

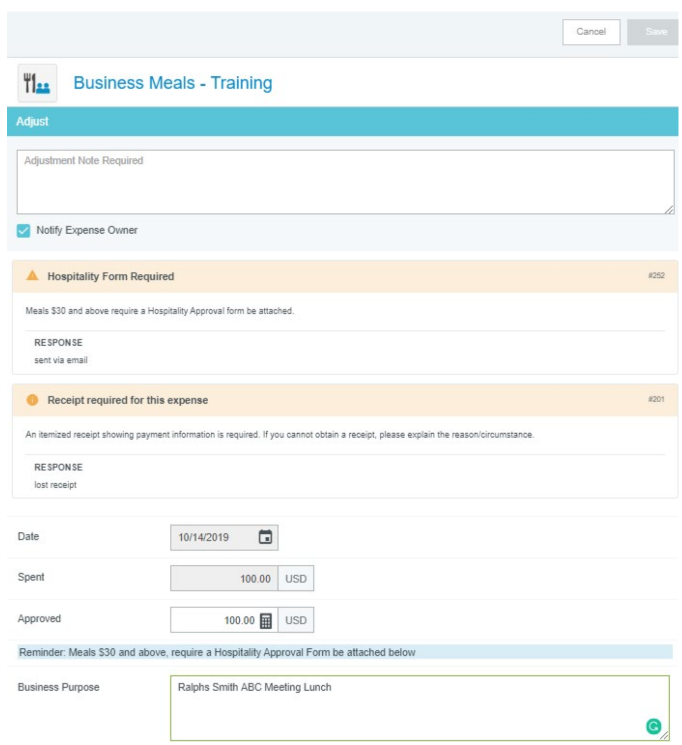


Adjust the report

During the approval process, approvers can adjust certain items on the expense report. The system requires an Adjustment note to be added. Approvers have the ability to control if the expense owner is notified of the adjustment made by selecting or deselecting the **Notify Expense Owner** check box.

- Approved amount – approvers can only adjust the approved amount down
- Business Purpose – approvers can fully edit this field
- Allocation – approvers can change the funding index
- Comments – approvers can add comments to the expense line; comments can never be removed
- Attachments – approvers can add attachments

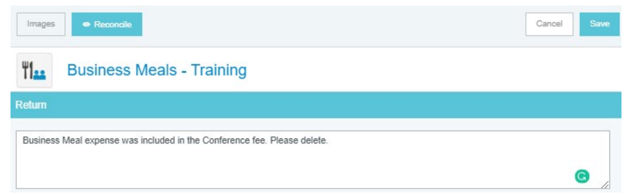
Click **Save** once you have completed the adjustment



Return individual expense line item

Individual expense lines can be returned to the expense owner. Once returned, only certain items can be fixed by the expense owner.
The system requires a Return note anytime you are returning an item.

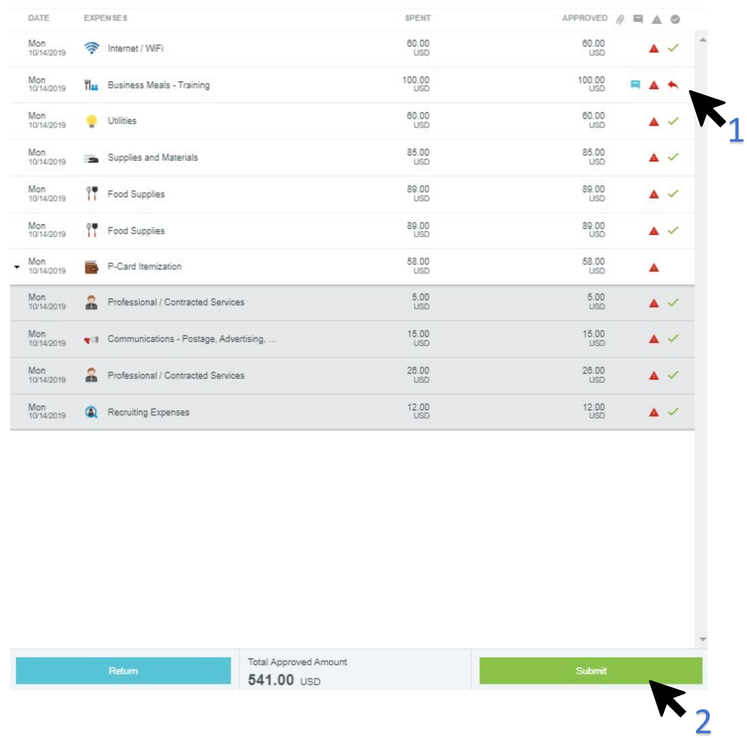
Click **Save**, and the line item will be marked for return on the left side of the screen (1)



If you mark a line for return, no action will happen until you have tapped the **Return** or **Submit** button at the bottom of the expense line item list.

When the approver clicks **Submit**, the line items marked for return will return to expense owner, and the lines marked approved will be routed to next approver.

Note: Clicking **Return** from this screen will return **all** expense lines to the expense owner.



Approve report

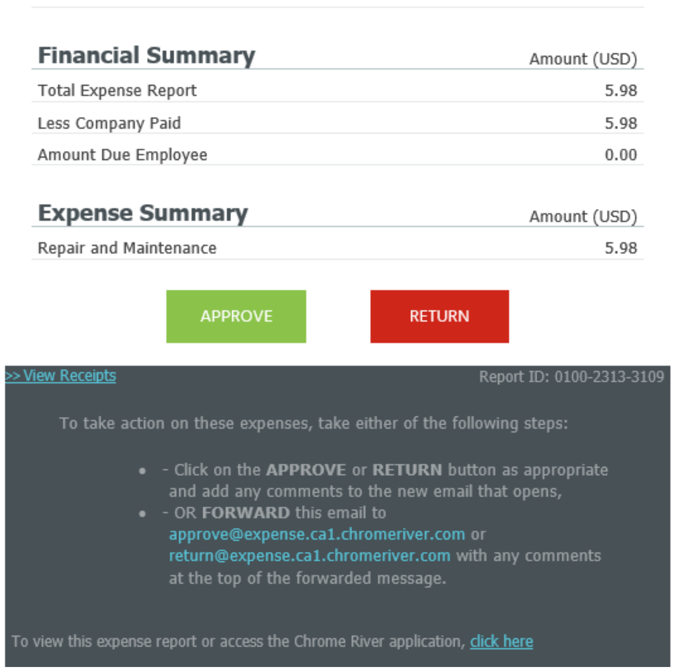
After you have reviewed the report and are ready to approve, click the **Submit** button at the bottom of the expense list (2).
NOTE: The approval function within a report is indicated using the Submit button due to the system needing to recalculate the report in the event there were adjustments made by the approver.

Once the Submit button has been clicked, the Submit Confirmation screen will appear.

Approve / Return via Email

Chrome River will email you the expense report that requires your approval. From the email you may **Approve** or **Return** the report.

The body of the email will contain details of the expenses on the report. At the bottom of the email, you will see the expense summary and the Accept/Return buttons. You can also click on the link provided to access the application and approve/return from there. Clicking on the "View Receipts" link will open a PDF of any receipts attached to the report.



If you choose to approve the report, click **Approve**. You will immediately be presented with an email that will require you to send. The email indicates your approval and will be sent to the Chrome River email address for approvals. You may add a note/comment to the email but it is not necessary. **You must, however, SEND the email for the approval to be confirmed.**

If you choose to return the report, click **Return.** You will immediately be presented with an email that will require you to send. The email indicates your return and will be sent to the Chrome River email address for returns. You will need to add a note/comment to the email for the expense owner to know the reason for the return. **You must SEND the email for the approval to be confirmed.**