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Login page and Dashboard

In order to access Chrome River, go to RamPort → Employee → Travel → Chrome River

Once logged in, you will be presented with the Chrome River home dashboard.

1 – Access dashboard, eWallet, receipt gallery, inquiry
2 – Return to the home dashboard
3 – Create a new Pre-Approval and Expense Report
4 – Access delegate settings, alternate email, logout
5 – Expense Report items
6 – Pre-Approval Items
7 – ASU information, reminders, and help
Create a Pre-Approval Report for Travel

Click “New” and select “New Pre-Approval Report” from the drop-down menu

Complete the Pre-Approval header – Trip Name, Start / End date, and Business Purpose

- Trip Name Standard– [Last Name - City, ST Departure Date]
  i. Example: Smith - Orlando, FL 06/16/19

TAR – Departure Date

TAR – Return Date

If your trip includes personal time, note it in this section

If you are traveling to multiple destinations, include each destination

Pre-Approvals For Bella Ewe

<table>
<thead>
<tr>
<th>Trip Name</th>
<th>Ewe - Orlando, FL 06/16/19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Start Date</td>
<td>06/16/2019</td>
</tr>
<tr>
<td>Business End Date</td>
<td>06/19/2019</td>
</tr>
<tr>
<td>Business Purpose</td>
<td>The 2019 NASPA Conference will provide those committed to student success from across the institution with dynamic keynotes, thought-provoking workshops, and networking opportunities.</td>
</tr>
</tbody>
</table>

TAR – Purpose/Reason for trip Benefit to ASU
Continue completing the Pre-Approval header.

**Travel Type**

- In State
- Out of State
- Out of State - Mexico and Canada
- Foreign Travel

*State of Texas considers Mexico and Canada as “Out of State” instead of Foreign Travel*

**Trip Type**

- Academic
- Athletics
- International
- Athletic Recruitment
- Student/Group Travel
- University Business

*Contact your Office Coordinator if you are not sure, as this is critical for the approval process*

**How many people will be attending this event?**

- Individual Travel
- Two or more travelers

*If you select “Two or more travelers” you will be prompted to complete a justification section which must include the names of **ALL** travelers. If you have a long list of travelers, you can list them on a Word document and attach to the Pre-Approval Report, after the first Save. Also, note in the justification section that you have attached the list.*

**Destination**

- Orlando, FL
- Orlando, FL - 32801
- Orlando, FL - 32802
- Orlando, FL - 32803

*Destination must be the zip code of the event, conference, meeting, etc.*

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**TAR – Multiple Traveler Justification**

**How many people will be attending this event?**

- Two or more travelers

**Provide justification for two or more**

- Roscoe Ram and I will be conducting a presentation

*For multiple destinations, select the furthest destination of the trip*
Designate the funds allocated for the trip by entering the funding account number (i.e., Fund/Org, FOAPAL) or the name of the account to select the correct fund. Check with your financial manager or office coordinator to ensure you select the correct account(s).

If the trip is funded from multiple sources, click “Add Allocation” to add additional accounts.

Specify the percentages from each funding source and ensure they total 100%.
Click “Save” at the top of the form when you have completed all of the Pre-Approval header items.

A PA Report ID is created for the Pre-Approval Report and displayed at the bottom left-hand part of the dashboard. You can use this number when contacting the ASU Travel Office with questions.

Once saved, the “Add Pre-Approval Types” mosaic page will appear on the right-hand side for you to enter travel cost estimates based on the expenses you expect to incur.

If a Pre-Approval Type tile has an arrow that signifies there are sub-categories for that expense type.

If at any time you navigate out of the “Add Pre-Approval Types” mosaic page, you can access the page by clicking the plus symbol on the left-hand side of the Pre-Approval dashboard.
Rental Vehicle

Ground Transportation → Rental Vehicle

For each expense, click “Save” and the travel estimate will appear on the left hand side of your pre-approval report screen.

Lodging

Click “Calculate” to retrieve the current GSA amount for lodging at your destination

http://gsa.gov
Enter the business “Start Date” and business “End Date”

<table>
<thead>
<tr>
<th>Calculate Allowable Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Start Date</strong></td>
</tr>
<tr>
<td><strong>End Date</strong></td>
</tr>
<tr>
<td><strong>Location</strong></td>
</tr>
<tr>
<td><strong>Rooms</strong></td>
</tr>
<tr>
<td><strong>Nights</strong></td>
</tr>
<tr>
<td><strong>Average Daily Room Rate</strong></td>
</tr>
<tr>
<td><strong>Base Total</strong></td>
</tr>
<tr>
<td><strong>Allowable Total</strong></td>
</tr>
</tbody>
</table>

Allowable Total: GSA amount without taxes and other fees.

Enter the “Allowable Total” in the “Lodging” text box and the “Hotel Taxes” will be estimated.

Perfectly okay if you just let out a shout of glee!

Go to http://ce.naco.org to locate the correct county

Tax is automatically calculated and you can adjust as necessary
If there is a justification for paying more than the GSA amount, complete the “Lodging Overage” section and the “Additional Comments” section.

**Mileage**

Mileage is automagically calculated through the Google Maps tool

**Ground Transportation → Mileage**
Complete the other travel tiles as applicable.

**NOTE:** Airfare and Airline Service Charge requires a separate Pre-Approval using “Pre-Pay on BTA (Business Travel Account)” see page 12 for instructions

Baggage fees must be entered on the main trip Pre-Approval.

**TAR – Incidentals** are now documented within specific tiles:

- *Gas* – Ground Transportation → Fuel
- *Parking* – Ground Transportation → Parking
- *Bag Fees* – Airfare → Baggage Fees

**TAR – Other Transp.** items (Taxi, Shuttle, Rail, Tolls) are now documented within the “Ground Transportation” tile

Say Hi to the Governor for me!
Notice the PA Report ID in the lower left hand part of the dashboard. You will use this ID when referencing an issue with the ASU Travel Office.

Don’t worry! The PA Report ID will be recorded and appear in other areas of the Chrome River Environment.

If you need to create a second Pre-Approval for airfare, you can copy and paste the PA Report ID into the Business Purpose of the second Pre-Approval.

We will wait right here for you to do that!
Airfare

Airfare and Airline Service Charge requires a separate Pre-Approval using “Pre-Pay on BTA (Business Travel Account)” Baggage fees must be entered on the main trip Pre-Approval.

Once you create a new Pre-Approval Report, complete the header with the same information as the first PA, except in the “Business Purpose” section, refer to the PA Report ID from the first PA.

Click “Save” and choose the Airfare → Airfare tile.

Enter the estimated amount and Paid by is “Pre Pay on BTA (Business Travel Account). Click “Save”
To enter the $30 service fee for Horizons Travel, select the **Airfare → Airline Service Charge** tile

Enter $30 and Paid by is “Pre Pay on BTA (Business Travel Account). Click “Save”

Confirm the information and click “Submit”

This will trigger a warning message to appear, since Chrome River noticed you have multiple days of travel scheduled without a hotel line item in this PA. Enter the first PA info and submit again.

---

*Overnight travel without lodging*

Please explain why there are multiple days of travel without a hotel line item

**Add Response**

This is for airfare with a BTA for PA 010000611529

---

The number in the message can help resolve an issue when contacting the Travel Office
Accessing a Draft Pre-Approval Report

Prior to submitting for approval, you can save your work at anytime and the Pre-Approval Report will be available for editing in the “Draft” section of the Pre-Approval dashboard.

Click the trip name to access the Pre-Approval header section. Notice the PA Report ID is also listed below the name of the trip.

Click “Open”

Click “Edit”

Notice the “Attachments” section at the bottom of the header. If you need to provide a long list of travelers, this is where you can upload a Word document, Excel spreadsheet, etc.
**View a Pre-Approval Report in PDF**

For a printable version of your Pre-Approval Report, open a Pre-Approval and click “PDF”

NOTE: If you do not see a particular button, you may need to maximize your window. Also, check the ... area to view more options for that dashboard screen.

**Submitting a Pre-Approval Report**

After entering all travel expense estimates, click “Submit”.

Review the Pre-Approval Certification statement and click “Submit”.

If an error message appears, correct the error and re-submit until no error messages appear.
The submitted Pre-Approval will appear in the left hand side of the dashboard.

The Pre-Approval will be sent through your designated approval workflow.

You will receive an email notification when the Pre-Approval has been approved or rejected.

If rejected, you will need to go back into Chrome River and make the necessary corrections and submit again.

Great job! Time to pack!

You have my permission to lean back, put your horns up, and scream “GO RAMS!”
Recall a Pre-Approval Report

If you submitted a Pre-Approval Report and need to recall it to make some corrections, you can do so as long as the Pre-Approval has not been accessed by your approver.

Click “Submitted Last 90 days” to access list of pre-approval reports

Click the pre-approval report to open it

Click “Recall”

Click “Yes”.

The Pre-Approval Report will now be listed in the “Draft” section
Track a Pre-Approval Report

Click “Submitted Last 90 days” to access list of pre-approval reports

Click the pre-approval report to open it

Click “Tracking”

NOTE: If you do not see a particular button, you may need to maximize your window. Also, check the [...] area to view more options for that dashboard screen.
In the tracking window, you can see the Routing Steps and who is assigned to approve.

<table>
<thead>
<tr>
<th>Status</th>
<th>Pending Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated Amount</td>
<td>811.62 USD</td>
</tr>
</tbody>
</table>

### Routing Steps

<table>
<thead>
<tr>
<th>Step Number</th>
<th>Assigned To</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Dominic Ram</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assigned To</th>
<th>Assigned Date</th>
<th>Step Status</th>
<th>Routing Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dominic Ram</td>
<td>04/02/2019 02:33 PM</td>
<td>Assigned</td>
<td>15 - If Reports To exists, route to Owner's Supervisor/Department Head. If Reports To is blank - FMFM</td>
</tr>
</tbody>
</table>

**NOTE:** Approvers for each step are identified in Banner. If you notice a discrepancy, please contact the Travel Office immediately.

Clap two times if you like this feature!
Create an Expense Report for Travel

Click “New” and select “New Expense Report” from the drop-down menu.

Click “Import Pre-Approval”.

Select the Pre-Approval report from the drop-down menu to open the report information.

Confirm it is the correct report and click “Import”.

Enter the “Business Start Time” and “Business End Time”. This information determines how you are reimbursed for first and last days of business trip

(“12 AM – 8 AM” to be reimbursed for breakfast, “7 PM – 12 AM” to be reimbursed for dinner).

Make any other changes on the header due to reflect the actual trip taken.

What a great conference! Ready for the new class!
Ensure each field is completed and click “Save” to proceed to the next section to enter your expenses.

Go through each expense until you see green checks on all the line items.

Notice the Expense Report ID is different than the PA Report ID.

Click on an expense category to submit receipts and confirm amount to be reimbursed. As you progress through each category, you will be presented with information to help you complete the expense report. Click the “Edit” button to open the expense category.

To add a receipt, click and drag the receipt image into the browser window or use the “Add Attachments – Upload Attachments” button to upload the receipt into the system.
Scan and Send Receipts

If you utilized the Scan and Send feature (take a pic and email your receipt to receipt@chromefile.com) you can access your receipt from the “Add Attachments – From Receipt Gallery” button.

After emailing the receipt, you will receive an email notification when the receipt has been received.

You will still need to keep your original receipts for three years plus the fiscal year.
Delegates

Chrome River offers two types of delegation to allow users to create and approve expense reports for each other at ASU.

- **Delegate:**
  - Create pre-approval and expense reports for another user and access his or her Settings menu, Home screen, and Inquiry reports. You will receive any e-mail notifications regarding rejection or adjustment of reports created for the user.
  - You will not be able to approve expenses that are routed to the user.

- **Approval Delegate:**
  - **Temporarily** approve expenses and pre-approvals for another user, via e-mail. You will not be able to access the user’s Approval screen. Not everyone will qualify to be an approval delegate.
  - Refer to the “FY 19 Succession Plan” to look up who can be an approval delegate.

Click your name in the top right-hand side of the dashboard to reveal a menu and select “Settings”

Another menu will appear on the left-hand side of the dashboard. Click “Delegate Settings”

A delegate can also upload receipts to your account.
Click the appropriate “+ Add New Delegates” depending on the type of Delegate you wish to assign.

Type in the name of the person to find them in the drop-down and select.

The delegate’s name will appear in the list. To remove a delegate, click the “X” beside their name.

To add a Approval Delegate, click “+ Add Approval Delegate”

Type in the name of the person to select them from the drop-down list.

Remember the Approval Delegate is for a specific period of time and should be on a temporary basis.
Enter the start and end date for the approver.

**NOTE:** You can only have one approval delegate for a designated time period.

![My Approval Delegate](image)

Click “Save” and the approval delegate will appear in the list.

![My Approval Delegate](image)

The delegate will receive the following email from expense-noreply@chromefile.com:

![Email](image)

Thanks for your time and do not hesitate to contact the Travel Office with any questions!

325-942-2725