APPROVALS

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 approvers 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.

From within the application:

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 upper right corner to sort the list by Date, Last Name, Pay Me Amount or Validated status

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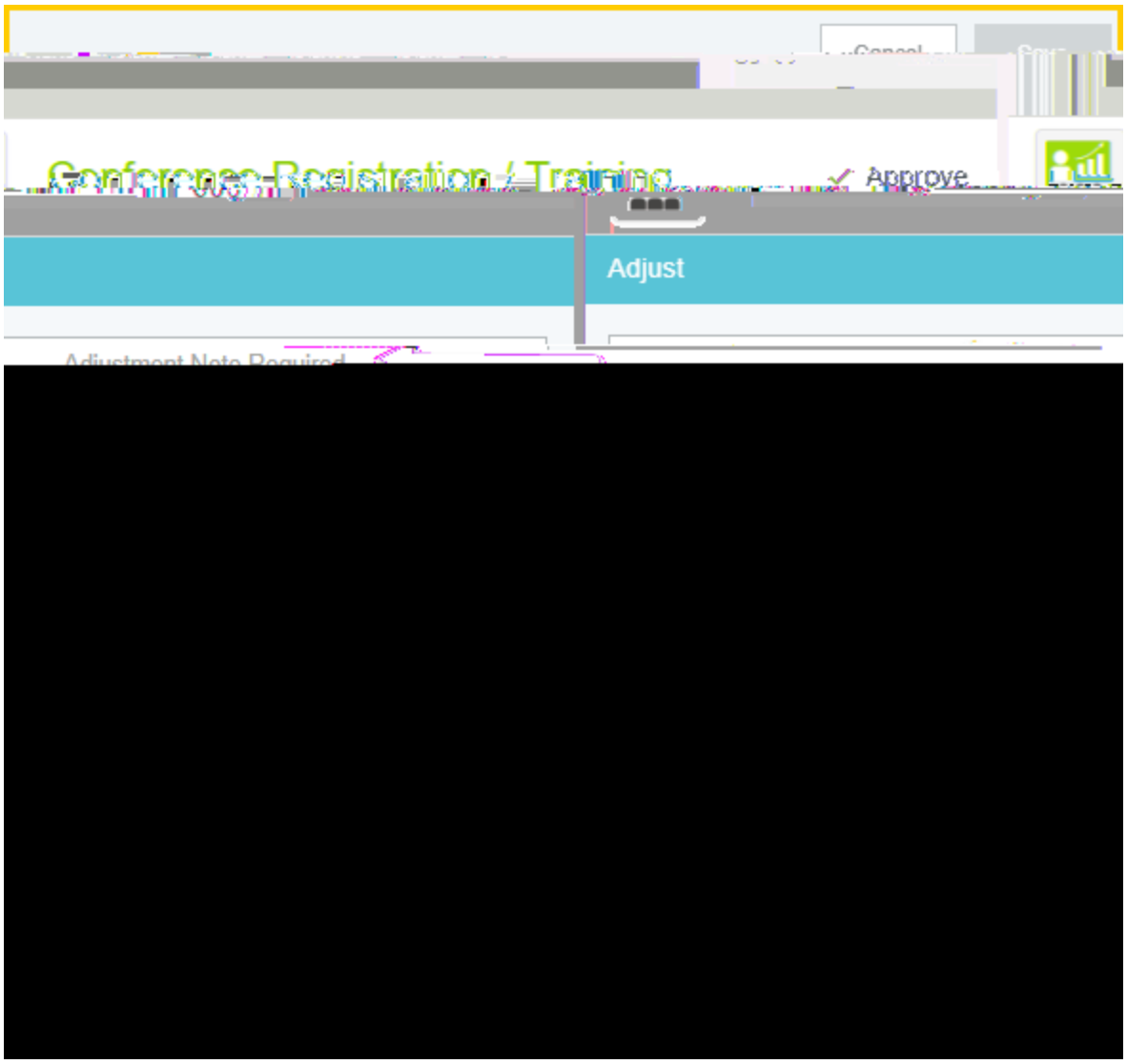
Approve from inside the report

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



ClickSaveonce you have completed your adjustment.

Return individual expense line

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.

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

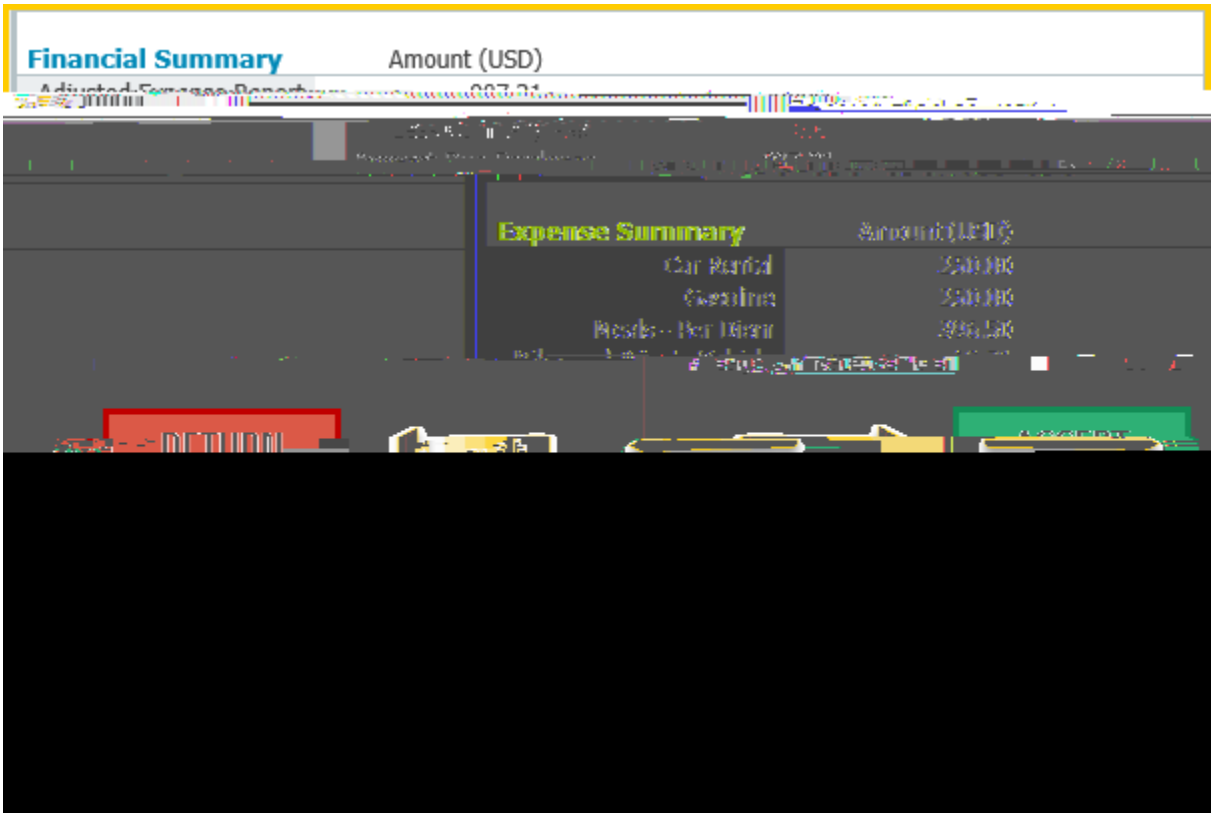
Note: Clicking Return from this screen will return all expense lines to the expense owner.

Approve

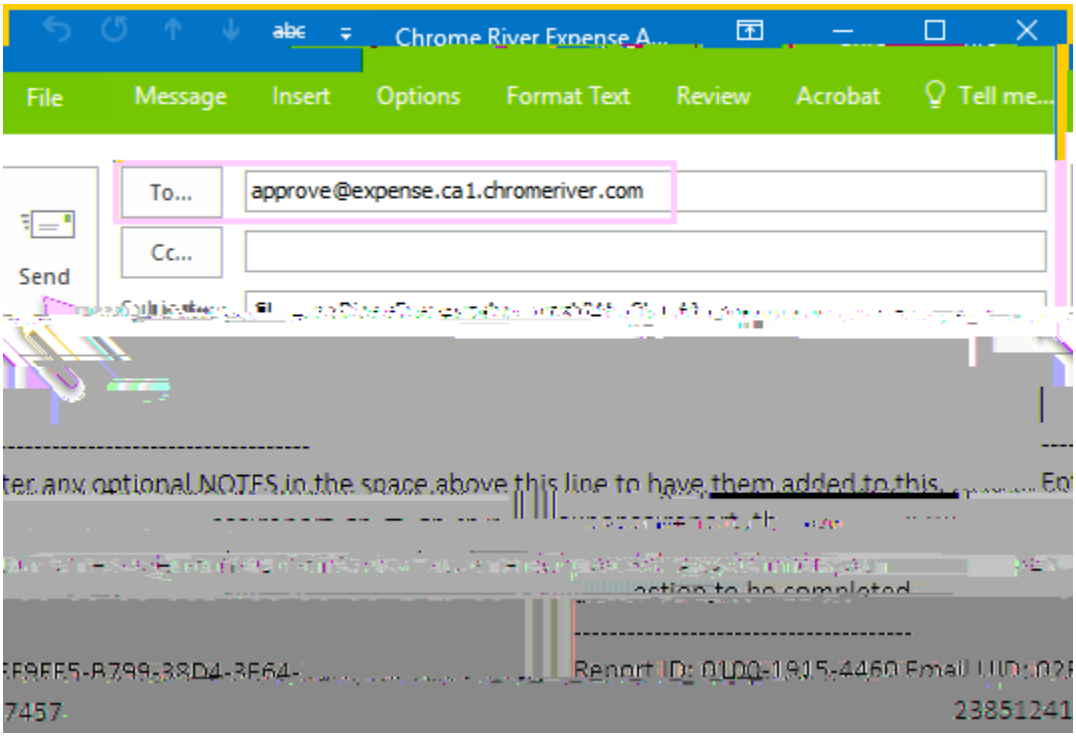
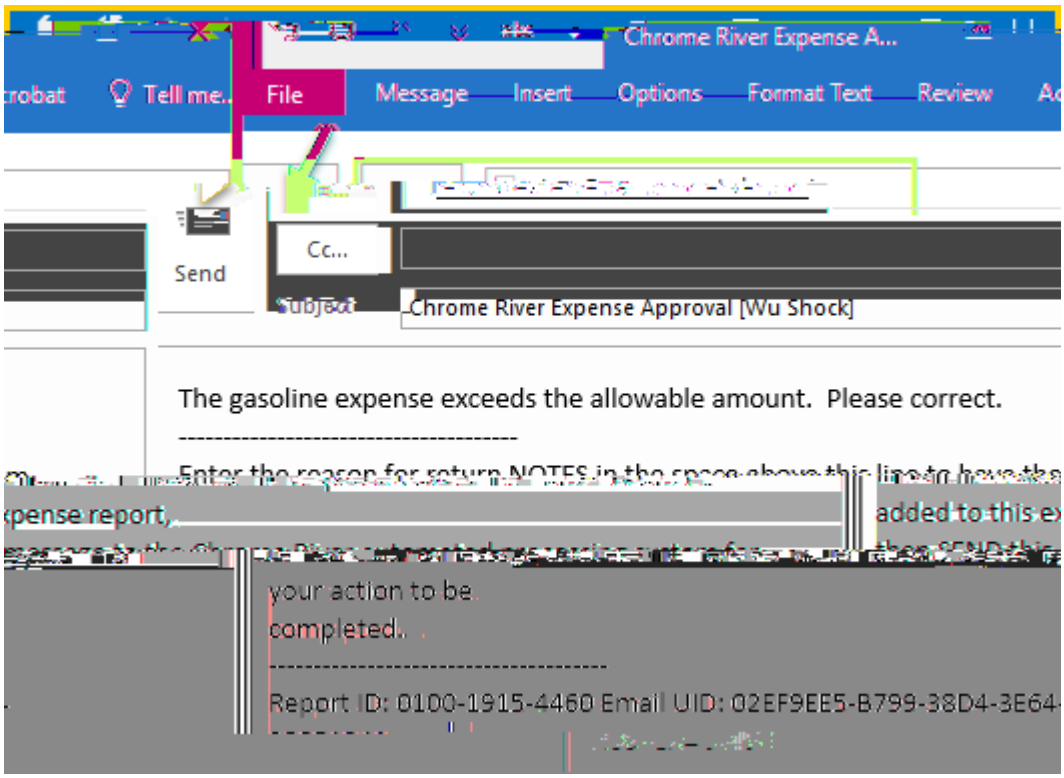
Approve / Return via email

Chrome River will email you the expense report that requires your approval. From the email you may Accept (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 Accept. 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 can add a note/comment to the email but it is not necessary. You must, however, SEND the email in order 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 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 in order for the approval to be confirmed.