

HOW TO APPROVE EXPENSE REPORTS FROM CHROME RIVER

Log into the Chrome River application on any web browser by going to the JMU webpage (www.jmu.edu). Choose Faculty/Staff and the IS Applications. Choose Chrome River.

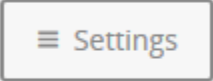

The screenshot shows the James Madison University website's Quick Login Access page. The top navigation bar includes the university name, a search bar, and menu items like ABOUT, ACADEMICS, ADMISSIONS, VISIT, TUITION & FINANCIAL AID, STUDENT LIFE, and ATHLETICS. The main content area is titled 'Quick Login Access' and features a sidebar on the left with categories such as IT HOME, SERVICES, ACADEMIC SUPPORT, ACCOUNTS & ACCESS, ADMINISTRATIVE SYSTEMS, and Human Resources. The 'ACCOUNTS & ACCESS' section is expanded, showing 'Quick Login Access' as the selected option. The main content area displays a grid of application tiles. The 'Finance' tile is highlighted in green, and the 'Chrome River' link within it is circled in red. Other tiles include HR Management, Student Administration, Advance iModules Email, Exchange, e-VA, Canvas, Effort Reporting (ERS), and various administrative systems. At the bottom, there is contact information for Information Technology and social media icons.

Enter your DUO Information


JAMES MADISON UNIVERSITY

Authentication with Duo is required for the requested service.

[> Need Help?](#)



Device:

Android (XXX-XXX-1461) 

[Send Me a Push](#)

[Enter a Passcode](#)

Remember me for 24 hours

Cancel this Request

Enter your EMPLID and password then Click Log in.

JAMES MADISON UNIVERSITY

JMU e-ID

Password

Log in

For help, contact the JMU IT Help Desk. 540-568-3555

TABLE OF CONTENTS

APPROVING REPORTS	PAGE 5
RETURNING REPORTS	PAGE 14
APPROVAL TRACKING REPORTS	PAGE 17
PRINTING REPORTS	PAGE 19

APPROVING EXPENSE REPORTS

This Home Screen will appear after logging in. You see Approvals Needed and the number of the Expenses Reports in your Cue. Click on Expense Reports.

The screenshot shows the CHROMERIVER home screen with a navigation bar at the top. The main content is divided into three horizontal sections: Approvals, Expenses, and Pre-Approval. The Approvals section is highlighted in orange and shows a checkmark icon, the text 'APPROVALS', and a box containing 'Approvals Needed' and '2 Expense Reports'. A red arrow points from a 'Click' button to the '2 Expense Reports' text. To the right of this box is '0 Pre-Approvals'. The Expenses section is blue and shows a wallet icon, the text 'EXPENSES', and three columns: '0 Draft', '0 Returned', and '3 Submitted Last 90 Days'. The Pre-Approval section is dark blue and shows a speech bubble icon, the text 'PRE-APPROVAL', and three columns: '0 Draft', '0 Returned', and '0 Submitted Last 90 days'.

Category	Draft	Returned	Submitted Last 90 Days
Approvals Needed	2 Expense Reports	0 Pre-Approvals	-
Expenses	0 Draft	0 Returned	3 Submitted Last 90 Days
Pre-Approval	0 Draft	0 Returned	0 Submitted Last 90 days

The Approvals Needed window will open showing all reports in your cue for approval.

The screenshot shows a web interface with an orange header bar containing a checkmark icon and the text 'Approvals Needed'. Below the header, there are two tabs: 'Expense Reports' (highlighted in orange) and 'Pre-Approvals'. A table of expense reports is displayed with the following data:

Expense Report	Date	Amount	Status
Knights, Bonnie Chrome River Meeting--Norfolk	03/06/2017	459.34 USD	✓

A red box highlights the 'Knights, Bonnie' entry, with a red arrow pointing to a callout box that says 'Click to open the Expense Report Header.'

Note: It is very important that you know the person and/or the department being charged for this travel. If the report was received in error, DO NOT APPROVE and contact the Accounts Payable Chrome River Administrator at 86231 or email wells2tm@jmu.edu.

Report Header (Right Side of the Screen)

Open PDF Tracking Return Approve

Chrome River Meeting--Norfolk

Report Owner: Bonnie Knight
Submit Date: 03/06/2017
Expense Report ID: 010016678620
Rule Description: 902 allocations route to AReview Purple Team - When MatterUDF2 = 902, matter number does not start with 5 or 8, and Report Type and Purpose are not Non-Travel Individual Reimbursement then route to a Group Role called Purple Team.

Prior Approvers

APPROVER	DATE
Bonnie Knight	03/06/2017
Mark Angel	03/06/2017
	03/06/2017

Financial Summary

	AMOUNT (USD)	APPROVED (USD)
Total Expense Reported	459.34	459.34
Less Cardholder Responsibility	0.00	0.00
Less University Paid Expenses	0.00	0.00
Less University Paid Personal Expense	0.00	0.00
Less Personal Expenses	0.00	0.00
Amount Due Employee	459.34	459.34
Total Expenses For Approval	459.34	459.34

Expense Summary

Take note of the person being paid, any prior approvers and the total dollar expenses for approval. Click Open to review the detail of expenses.

These two pages open.

Expense Report For Bonnie Knight

Chrome River Meeting-Norfolk

0 Comments | 2 Attachments

DATE	EXPENSES	SPENT	APPROVED
Sun 02/26/2017	Meals - Per Diem	38.25 USD	38.25 USD
Tue 02/28/2017	Meals - Per Diem	38.25 USD	38.25 USD
Mon 02/27/2017	Meals - Per Diem	39.00 USD	39.00 USD
Sun 02/26/2017	Mileage	108.84 USD	108.84 USD
Tue 02/28/2017	Hotel	235.00 USD	235.00 USD
Mon 02/27/2017	Hotel Lodging / PerDiem	182.00 USD	182.00 USD
Tue 02/28/2017	Hotel Room Tax / Fees	53.00 USD	53.00 USD

Return | Total Approved Amount: 459.34 USD | Submit

List of Expenses

Expenses For Bonnie Knight

Report Name: Chrome River Meeting-Norfolk

Pay Me In: USD - US Doll...

Report Type: Domestic

Report Purpose: Other

Type of Traveler: Employee

Non-Employee: -- Select --

Travel Start: 02/26/2017

Travel End: 02/28/2017

Business Days: 3

Comments (0)

Add Comment | Post

Attachments (2)

Browse File to Attach

Expense Report Header

(Left Side of the Screen)

(Right Side of the Screen)

The Right Side of the Screen is the Expense Report Header information. This tells a brief description of the travel, the Report Type and Purpose and the travel dates.


Images

Expenses For Bonnie Knight


Report Name	Chrome River Meeting-Norfolk
Pay Me In	USD - US Doll...
Report Type	Domestic
Report Purpose	Other
Type of Traveler	Employee
Non Employee	-- Select --
Travel Start	02/26/2017
Travel End	02/28/2017
Business Days	3

Comments (0)

Add Comment

Attachments (2)  

All attachments required are below.



The combination of the Report Type with the Report Purpose is how the account coding is applied to the expenses.

All attachments required are below.

To see details of each expense and any notes you will need to Click on each individual expense. In this example, we clicked on Meals - Per Diem.

Expenses For
Bonnie Knight

Chrome River Meeting-Norfolk


0 Comments 2 Attachments

DATE	EXPENSES	SPENT	APPROVED
Sun 02/28/2017	Meals - Per Diem	38.25 USD	38.25 USD ✓
Tue 02/28/2017	Meals - Per Diem	38.25 USD	38.25 USD ✓
Mon 02/27/2017	Meals - Per Diem	39.00 USD	39.00 USD ✓
Sun 02/28/2017	Mileage	108.84 USD	108.84 USD ✓
Tue 02/28/2017	Hotel	235.00 USD	235.00 USD
Mon 02/27/2017	Hotel Lodging / PerDiem	182.00 USD	182.00 USD ✓
Tue 02/28/2017	Hotel Room Tax / Fees	53.00 USD	53.00 USD ✓

Left Side of the Screen

The detail to each expense opens on the Right Side of the Screen. Take note of the details of each expense to insure proper approval.

Images Adjust Return

 **Meals - Per Diem**

Date: 02/26/2017

Spent: 38.25 USD

Approved: 38.25 USD

Description:

Location: Norfolk, Virginia (VA), United States

Deductibles

Breakfast

Lunch

Dinner

Travel Day

Additional Deduction


Allocation

100432 - ACCOUNTS PAYABLE

Comments (0)

Add Comment Post

Attachments (0) Grid Icon Close Icon

 Browse File to Attach

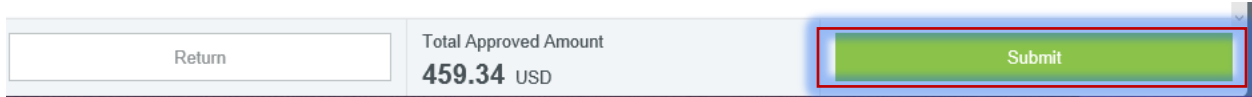
1 of 5 Next >

The Right Side of the Screen changes as you click the different expenses on the Left Side of the Screen allowing you to look at each expense in detail.

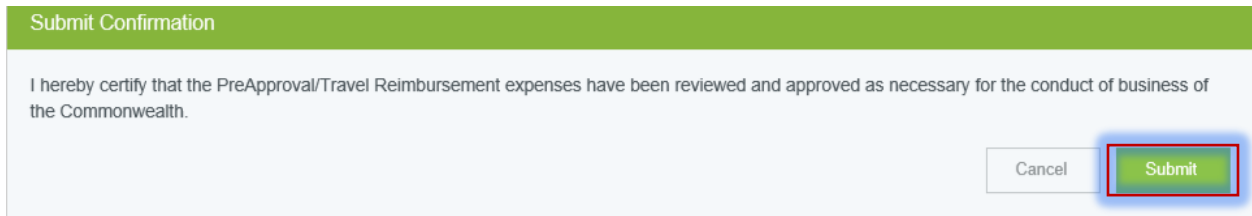
If all the line item expenses have been reviewed, and there are **no** changes, it can be approved two ways.

- 1) To approve the expense report while in the details, simply Click the Submit Button on the bottom of the Left Side of your Screen.

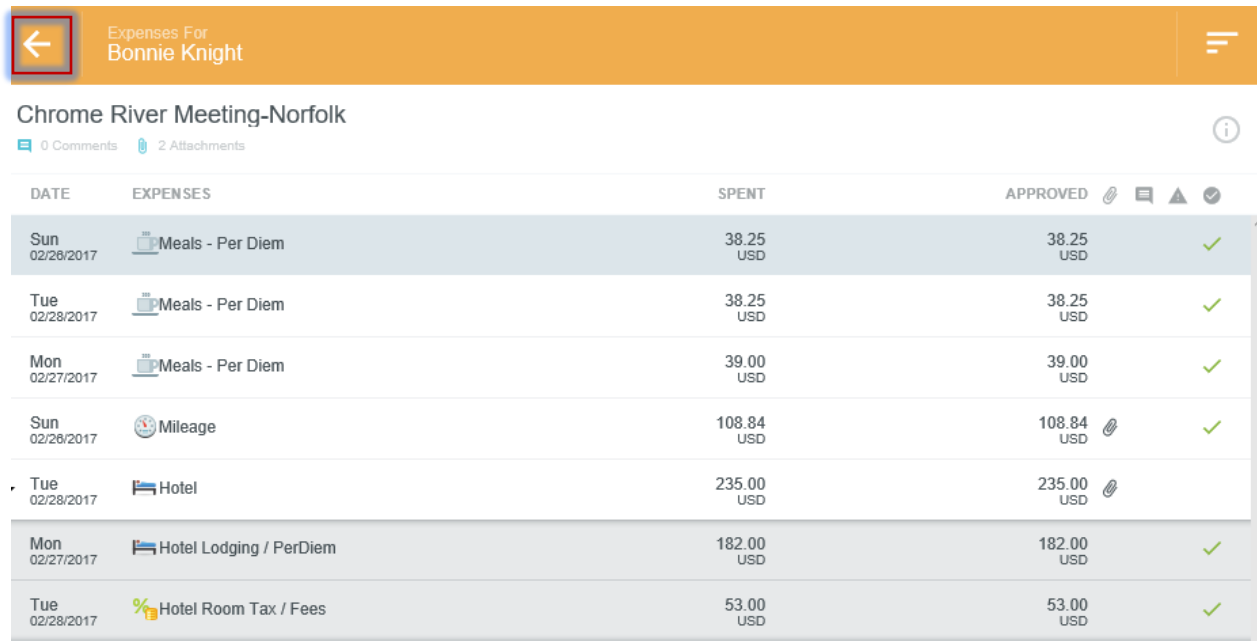
Bottom of the Left Side of the Screen



This statement will show on the Right Side of the Screen. Click Submit.



- 2) You can also Approve an expense report from the Report Header. On the Left Side of the Screen Click the Arrow to take you back to the Report Header.



Report Header

Open PDFTracking Return **Approve**

Chrome River Meeting--Norfolk

Report Owner	Bonnie Knight
Submit Date	03/06/2017
Expense Report ID	010016678620
Rule Description	902 allocations route to APReview Purple Team - When MatterUDF2 = 902, matter number does not start with 5 or 8, and Report Type and Purpose are not Non-Travel Individual Reimbursement then route to a Group Role called Purple Team.

Prior Approvers

APPROVER	DATE
Bonnie Knight	03/06/2017
Mark Angel	03/06/2017
	03/06/2017

Financial Summary

	AMOUNT (USD)	APPROVED (USD)
Total Expense Reported	459.34	459.34
Less Cardholder Responsibility	0.00	0.00
Less University Paid Expenses	0.00	0.00
Less University Paid Personal Expense	0.00	0.00
Less Personal Expenses	0.00	0.00
Amount Due Employee	459.34	459.34
Total Expenses For Approval	459.34	459.34

Expense Summary

Right Side of the Screen

This statement will show on the Right Side of the Screen. Click Submit.

Submit Confirmation

I hereby certify that the PreApproval/Travel Reimbursement expenses have been reviewed and approved as necessary for the conduct of business of the Commonwealth.

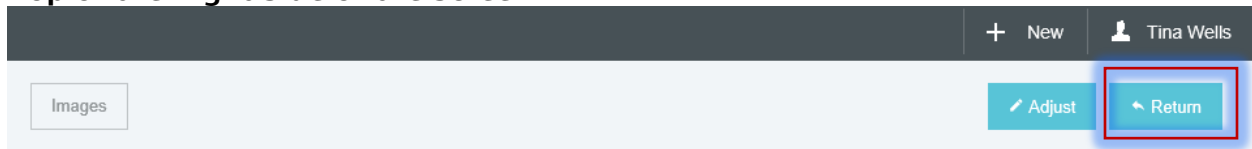
Cancel **Submit**

RETURNING EXPENSE REPORTS

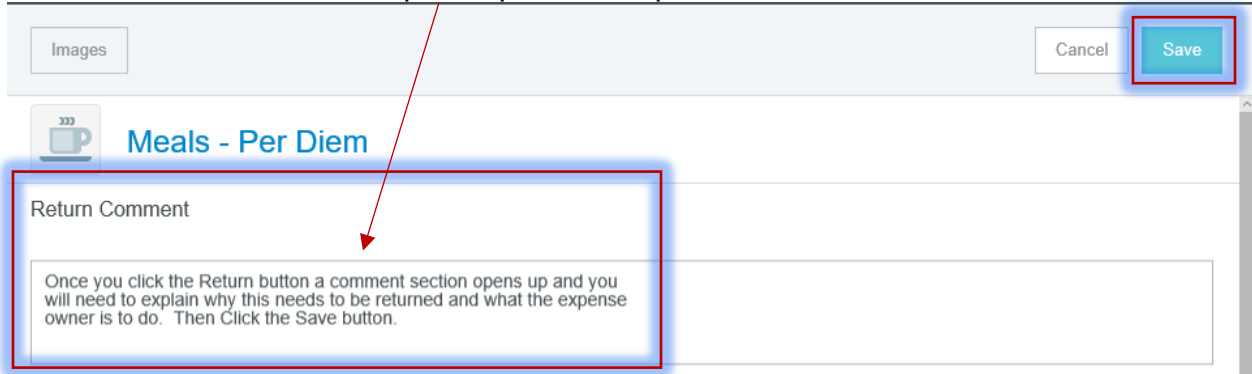
If the expense report does not meet your approval, it can be returned to the expense owner two ways.

- 1) To return a **line item** in the report that does not meet your approval make sure you have opened the expense line you want to return. In this example, we are returning the expense line item Meals - Per Diem. Click the Return button at the top of the Right Side of your Screen.

Top of the Right Side of the Screen



The Return Comment box opens up for an explanation of the return. Click Save.



NOTE: Notice on the Left Side of the Screen a red arrow indicates the expense being returned.



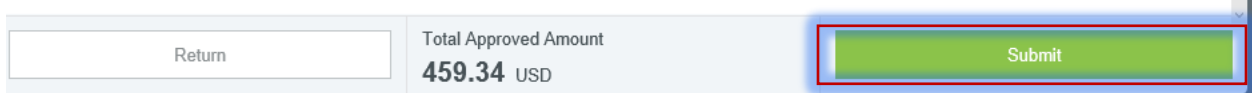
The expense detail page (Right Side of the Screen) will now display an Approve button.



DO NOT click the Approve button unless you want to **UNDO** the returned item.

Once the rest of the report meets your approval, Click the Submit button at the bottom of the Left Side of the Screen.

Bottom of the Left Side of the Screen



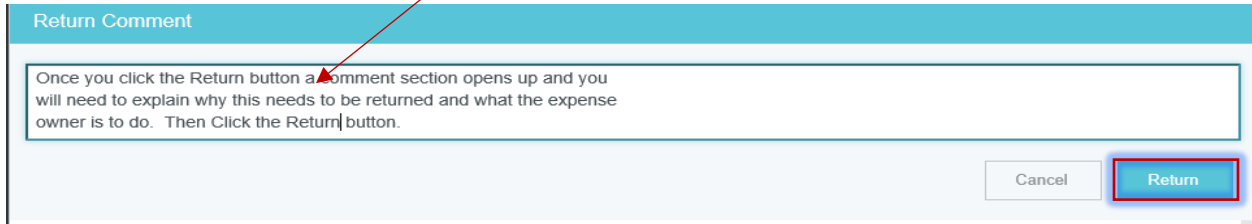
NOTE: This will submit all the approved line items in the expense report on to the next approver and return any line items back to the expense owner.

- 2) To return an entire expense report Click the Return button at the bottom of the Left Side of your Screen.

Bottom of the left side of the screen



The Return Comment box opens up. Type in the reason for returning the report and Click Return.



When the Return button is clicked, the entire expense report will be returned to the expense owner.

OR

You can also return an entire expense report from the Report Header. On the Left Side of the Screen Click the Arrow to take you back to the Report Header.

A screenshot of the report header for 'Bonnie Knight'. The header is orange and contains a white arrow button on the left, the text 'Expenses For Bonnie Knight', and a hamburger menu icon on the right. Below the header is the report title 'Chrome River Meeting-Norfolk' and a sub-header '0 Comments 2 Attachments'. The main content is a table of expenses.

DATE	EXPENSES	SPENT	APPROVED	
Sun 02/28/2017	Meals - Per Diem	38.25 USD	38.25 USD	✓
Tue 02/28/2017	Meals - Per Diem	38.25 USD	38.25 USD	✓
Mon 02/27/2017	Meals - Per Diem	39.00 USD	39.00 USD	✓
Sun 02/28/2017	Mileage	108.84 USD	108.84 USD	✓
Tue 02/28/2017	Hotel	235.00 USD	235.00 USD	
Mon 02/27/2017	Hotel Lodging / PerDiem	182.00 USD	182.00 USD	✓
Tue 02/28/2017	Hotel Room Tax / Fees	53.00 USD	53.00 USD	✓

Report Header

Open PDFTrackingReturnApprove

Chrome River Meeting--Norfolk

Report Owner	Bonnie Knight
Submit Date	03/06/2017
Expense Report ID	010016678620
Rule Description	902 allocations route to APReview Purple Team - When MatterUDF2 = 902, matter number does not start with 5 or 8, and Report Type and Purpose are not Non-Travel Individual Reimbursement then route to a Group Role called Purple Team.

Prior Approvers

APPROVER	DATE
Bonnie Knight	03/06/2017
Mark Angel	03/06/2017
	03/06/2017

Financial Summary

	AMOUNT (USD)	APPROVED (USD)
Total Expense Reported	459.34	459.34
Less Cardholder Responsibility	0.00	0.00
Less University Paid Expenses	0.00	0.00
Less University Paid Personal Expense	0.00	0.00
Less Personal Expenses	0.00	0.00
Amount Due Employee	459.34	459.34
Total Expenses For Approval	459.34	459.34

Expense Summary

Right Side of the Screen

The Return Comment box opens up. Type in the reason for returning the report and Click Return.

Return Comment

Once you click the Return button a comment section opens up and you will need to explain why this needs to be returned and what the expense owner is to do. Then Click the Return button.

CancelReturn

APPROVAL TRACKING EXPENSE REPORTS

If you would like to see the approval flow of the expense report Click Tracking at the Report Header page.

Report Header

Open
PDF ▾

Tracking
Return
Approve

Chrome River Meeting--Norfolk

Report Owner	Bonnie Knight
Submit Date	03/06/2017
Expense Report ID	010016678620
Rule Description	902 allocations route to APReview Purple Team - When MatterUDF2 = 902, matter number does not start with 5 or 8, and Report Type and Purpose are not Non-Travel Individual Reimbursement then route to a Group Role called Purple Team.

Prior Approvers

APPROVER	DATE
Bonnie Knight	03/06/2017
Mark Angel	03/06/2017
	03/06/2017






Financial Summary

	AMOUNT (USD)	APPROVED (USD)
Total Expense Reported	459.34	459.34
Less Cardholder Responsibility	0.00	0.00
Less University Paid Expenses	0.00	0.00
Less University Paid Personal Expense	0.00	0.00
Less Personal Expenses	0.00	0.00
Amount Due Employee	459.34	459.34
Total Expenses For Approval	459.34	459.34


Expense Summary

Right Side of the Screen

The Tracking Detail page opens. Click on the Expense Type you want to track.


Tracking for Chrome River Meeting-Norfolk			
EXPENSE TYPE	AMOUNT (USD)	STATUS	CURRENTLY ASSIGNED
 Meals - Per Diem	39.00	Pending Approval	Tina Wells
▶  Hotel	235.00		
 Mileage	108.84	Pending Approval	Tina Wells
 Meals - Per Diem	38.25	Pending Approval	Tina Wells
 Meals - Per Diem	38.25	Pending Approval	Tina Wells

This page opens. Clicking on the circles provides history of the approval flow. A green check indicates an approval. When done, Click the X.


Meals - Per Diem

Spent Converted	38.25 USD
Amount Spent	38.25 USD
Routing Status	Pending Approval

Routing Steps



Step Number	6
Assigned To	Mark Angel
Approver	Mark Angel
Assigned Date	03/06/2017 11:37 AM
Step Status	Approved
Completed Date	03/06/2017 11:38 AM
Completed By	Mercury
Routing Rule	102200 - Routing to Allocation Approver

This indicates a return by an approver.

PRINTING AN EXPENSE REPORT

To see online in report form or to print an expense report, Click the PDF button at the Report Header page.

Open
PDF ▾

Tracking
Return
Approve

Chrome River Meeting--Norfolk

Report Owner	Bonnie Knight
Submit Date	03/06/2017
Expense Report ID	010016678620
Rule Description	902 allocations route to APReview Purple Team - When MatterUDF2 = 902, matter number does not start with 5 or 8, and Report Type and Purpose are not Non-Travel Individual Reimbursement then route to a Group Role called Purple Team.

Prior Approvers

APPROVER	DATE
Bonnie Knight	03/06/2017
Mark Angel	03/06/2017
	03/06/2017

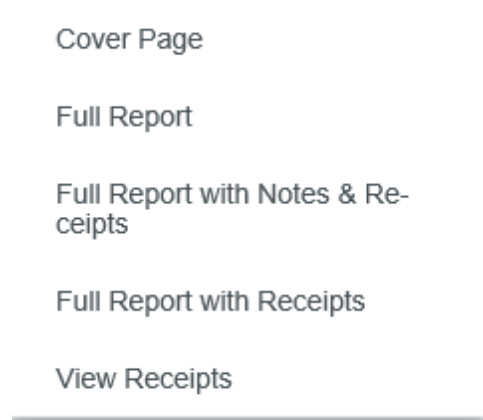
Financial Summary

	AMOUNT (USD)	APPROVED (USD)
Total Expense Reported	459.34	459.34
Less Cardholder Responsibility	0.00	0.00
Less University Paid Expenses	0.00	0.00
Less University Paid Personal Expense	0.00	0.00
Less Personal Expenses	0.00	0.00
Amount Due Employee	459.34	459.34
Total Expenses For Approval	459.34	459.34

Expense Summary

Right Side of the Screen

The following Report Options open. Select a report option. This will open the PDF for you to review online or print.



NOTE: Once the pdf report is closed, the Report Header page will appear on the Right Side of the Screen. If there are NO issues, you can approve the expense report here by Clicking Approve. If there ARE issues, you can return the expense report to the expense owner from here by Clicking Return.

Report Header

Open	PDF ▾	Tracking	Return	Approve
------	-------	----------	--------	---------

Chrome River Meeting--Norfolk

Report Owner	Bonnie Knight
Submit Date	03/06/2017
Expense Report ID	010016678620
Rule Description	902 allocations route to APReview Purple Team - When MatterUDF2 = 902, matter number does not start with 5 or 8, and Report Type and Purpose are not Non-Travel Individual Reimbursement then route to a Group Role called Purple Team.

Prior Approvers

APPROVER	DATE
Bonnie Knight	03/06/2017
Mark Angel	03/06/2017
	03/06/2017

Financial Summary

	AMOUNT (USD)	APPROVED (USD)
Total Expense Reported	459.34	459.34
Less Cardholder Responsibility	0.00	0.00
Less University Paid Expenses	0.00	0.00
Less University Paid Personal Expense	0.00	0.00
Less Personal Expenses	0.00	0.00
Amount Due Employee	459.34	459.34
Total Expenses For Approval	459.34	459.34

Expense Summary

Right Side of the Screen