

South Texas College

Chrome River Travel

Training Manual – **Pre-Approval**

Business Office

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Pre-Approval - Trips

(Authorizations to travel for Trips)

Every STC approved trip requires a Travel Authorization to be on file with the Travel office. Please refer to Travel Guidelines for deadlines and best practices on submission of travel.

NOTE: \$0 dollar trips (no expenses will be incurred) require paper documents to be filed with the Travel Office.

NOTE: Registration only expenses, which include online webinars or conferences, (no other expenses such as mileage/per diem) require a purchase requisition through the purchase order system with Purchasing.

ChromeRiver uses Report Types which will distinguish who is traveling and will guide the approval routing of your report.

Report Types can be:

- A. Employee Travel
- B. Non-Student Club Travel
- C. Student Club Travel
- D. Student Employee Grant Travel

Travel Types further identify what kind of travel the trip is for. Travel types can be:

- In District Mileage (DO NOT select for trips)
- In State
- International
- Out of State

For ChromeRiver, allocations refer to the Banner Fund-Organization-Program that will fund the trip. Employees have access to all FOAPs and it's very important to make sure the correct allocation is selected. In the Search for Allocation box, you can start typing an organization name or actual numbers and the system will start to display funding that matches what is being entered. Once this is selected the pre-approval can be saved and once submitted, routing will be based on the report type, travel type and FOAP entered. When approving a pre-approval, it is also crucial that the financial manager catch and return pre-approvals that should not be funded from their FOAP. Responsibility on entering and approving the correct FOAP is on the traveler and financial manager.

Create a Pre-Approval - Trips

Previously: Travel Authorization (Trips)

Log into Chrome River via Jagnet. Pre-approvals allow you to obtain permission to travel on behalf of the college and to allow pre-authorization for an expense before it is incurred.

The screenshot shows the Chrome River dashboard for Patricia Jackson. On the left, there are two main sections: 'EXPENSES' and 'PRE-APPROVAL'. Each section has a grid of statistics: Draft, Returned, and Submitted (Last 90 Days). The 'EXPENSES' section shows 0 Draft, 0 Returned, and 3 Submitted. The 'PRE-APPROVAL' section shows 0 Draft, 0 Returned, and 5 Submitted. On the right, there is a 'CONTACT' section for South Texas College with a list of support contacts: Accounts Payable Support, Credit Card Support, and Accounts Payable Manager, each with a phone number and an 'Email Us' link. Below the contact list is a 'NOTICES' section with two reminders: one about Per Diem Rules regarding meal entitlements, and another about Mobile device access, explaining that Chrome River is a web application and providing instructions for mobile access. A feature highlight section describes the 'Emailing receipts to your account' feature.

Click the +New button then click New Pre-Approval Report from the drop-down list.

This screenshot shows the same Chrome River dashboard as the previous one, but with the '+ New' button in the top right corner clicked. A dropdown menu is open, showing two options: 'New Expense Report' and 'New Pre-Approval Report'. The 'New Pre-Approval Report' option is highlighted with a blue arrow pointing to it from the right. The rest of the dashboard content, including the statistics and contact information, remains the same as in the previous screenshot.

The system will take you to this screen. Start entering your pre-approval information. Requirements are below the screen shot.

The screenshot shows the Chrome River interface for creating a pre-approval report. The left sidebar shows a summary of the report with a 'Submit' button. The main form area contains the following fields:

- Report Name: [Text Input]
- Start Date: [Calendar Picker]
- End Date: [Calendar Picker]
- Number of Days: [Input: 0]
- Pay Me In: [Dropdown: USD - US Dollars]
- Business Purpose: [Text Area]
- Travel Justification: [Text Input]
- Cash Advance Amount: [Input: 125.68]

**If your department requires Dean approval
Select Yes here.**

This section of the form includes the following dropdown menus:

- Report Type: -- Select --
- Travel Type: -- Select --
- Is personal time included in this trip?: -- Select --
- Dean approval required for this trip?: -- Select --

The 'Dean approval required for this trip?' dropdown is highlighted with a blue arrow from the text above.

Enter the Report Name (first letter of traveler's first name (underscore) full last name (underscore) City (space) State (underscore) start travel date (example: J_Smith_Austin TX_031020).

Enter the start date = **use the departure date on the Travel Agency airfare quote or if driving, the date you are leaving the valley or campus.**

Enter the end date = **use the arrival date on the Travel Agency airfare quote or if driving, the date you arrive to the valley or campus.**

The Number of Days will populate on its own because it is determined by the start and end dates. The Pay Me In should always be in USD-US Dollars.

The Business Purpose section will be the 3 justification questions with answers. *****Note: This field has a violation (hard stop) which requires you to enter more than 25 characters before you can proceed.**

The questions are as follows:

- a. What is the purpose of the travel?
- b. Why is the travel necessary?
- c. How does the travel benefit STC?

*****Please note that the questions are also underneath the Business Purpose box.**

The Travel Justification is optional because you already provided the questions in the business purpose box.

Enter the Cash Advance Amount which is the 80% per diem. The 80% calculation of the per diem will need to be calculated by the end user. *****Note: The system is automatically set up to calculate the per diem using the current GSA rates using the city and state you have entered. The cash advance will show up on your e-wallet once the pre-approval is fully approved.**

In this example I am using a cash advance of \$125.68.

Select the Report Type from the drop-down list.

The options are as follows:

- a.) Employee Travel = Any travel that is being paid for by a fund that does not start with 2, 3, or 8.
- b.) Non-Student Club Travel = Any travel that is being paid with a fund code that begins with a 3.
- c.) Student Club Travel = Any travel that is being paid with a fund code that begins with an 8.
- d.) Student Employee Grant Travel= Any travel that is being paid with a fund code that begins with a 2.

Select the Travel Type

- a.) In District Mileage
- b.) In State
- c.) International
- d.) Out of State

Answer the question "Is personal time included in this trip?" Yes or No

Answer the question "Is Dean approval required for this trip?" Yes or No.

*****Note: If your division does not report to a dean always select no. If you do select a dean you must select the correct one because the system will take any dean on the drop-down menu regardless of whether they belong to your department or not.**

Traveler ID will be populated on its own and it will be the A# of the traveler.

Now enter the allocation/FOAPL you will be using to pay for the travel.

*****Note: Click within the box and enter the organization code. When the FOAPL comes up click on it so that it will populate into the box. This system will allow multiple allocations but you will need to split it between the FOAPL's.**

This first section of required information is to complete the Report Header for pre-approvals. The next steps will be to enter the pre-approval authorization expenses. *****Note: You do not attach anything at this stage.** The end result should look like this screen shot. Once you are sure everything is correct click Save.

EXPENSE	ESTIMATED
Conference / Seminar	500.00 USD
Hotel	300.62 USD
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Professional Membership Dues	125.00 USD
Meals - Per Diem	61.00 USD
Car Rental	110.00 USD

PA Report ID: 010000431869 | Total Estimated Amount: 1,767.42 USD

Report Name: P_Jackson_Austin TX_061420

Start Date: 06/14/2020

End Date: 06/17/2020

Number of Days: 4

Pay Me In: USD - US Dollars

Business Purpose: 1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV

Report Type: Employee Travel

Travel Type: In State

Is personal time included in this trip?: No

Is Dean approval required for this trip?: No

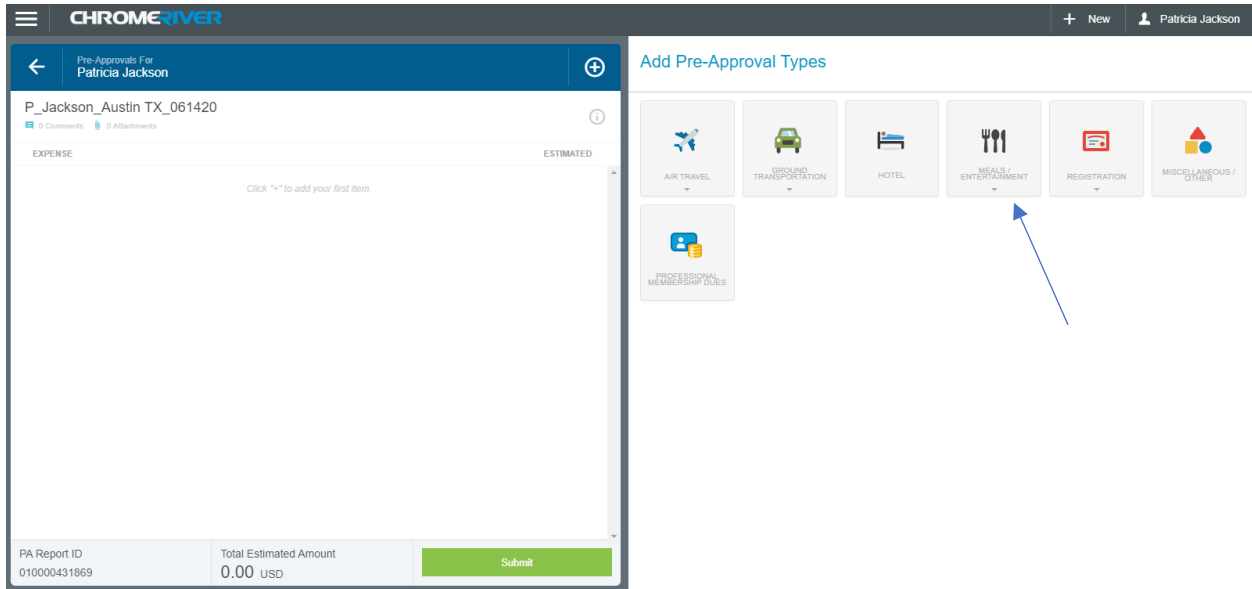
TravelerID: A00136468

Allocation: 110000-410013-6300 General Funds Business Office, Bus & Fiscal Management

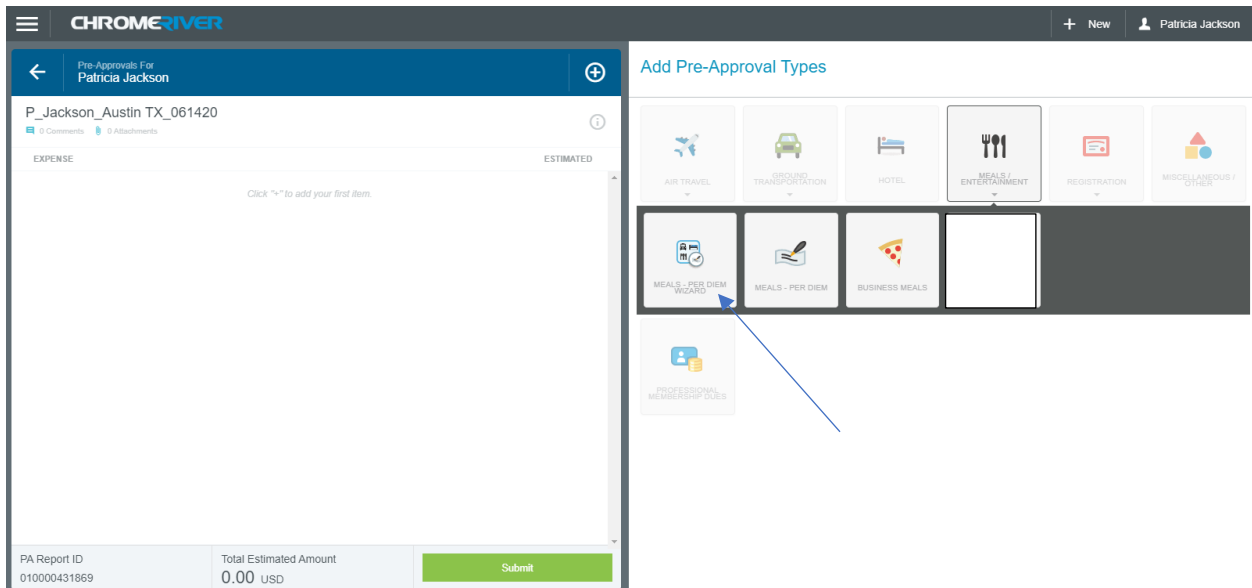
Notice the + sign Add Allocation field. Here is where you can enter multiple FOAPL's if two departments are paying for a traveler's travel expenses. The system allows split of expenses by percentage or amount is manually entered if needed.

Pre-Approval expense – Per Diem

The system will automatically take you to this screen once you save the report. Here is where you are going to enter the pre-approval authorization expenses (pre-trip). *****Note: Do not hit the green submit button until you have entered all the pre-approval expenses.** Click on Meals and Entertainment which is for per diem.



The system will populate a second set of mosaics. Select the Meals – Per Diem Wizard.



The system will take you to this screen.

CHROME RIVER

+ New Patricia Jackson

Per Diem Wizard

Start Date: [Date Picker] 00:00

End Date: [Date Picker] 23:59

Days: 0

Description (Optional): Add Description

Location: Search for Location

Paid by STC: -- Select --

Add Entries Cancel Add to Report

The time is in military time so make sure to select the proper time.

Enter the start date = ***the departure date and time on the Travel Agency airfare quote or if driving, the date and time you are leaving the valley or campus.***

Enter the end date = ***the arrival date and time on the Travel Agency airfare quote or if driving, the time of arrival to the valley or campus.***

The days will automatically populate using the start and end date.

The description should have the A# of the traveler and the traveler name

The location is the city and state of the destination you are traveling to. Once you start entering the city it will populate a drop-down list. Make sure to select the correct city and state. On Paid by STC select Yes. If you are sure the city and state are correct click "Add Entries"

CHROME RIVER

+ New Patricia Jackson

Per Diem Wizard

Start Date: 06/14/2020 09:30

End Date: 06/17/2020 20:00

Days: 4

Description (Optional): A00136468 Patricia A. Jackson

Location: Austin-Travis County, Texas (TX), United States

Paid by STC: Yes

Add Entries Cancel Add to Report

The system will then take you to this screen and if everything is correct click Add to Report

DATE	LOCATION	AMOUNT
Sun, 06/14/2020	Austin, Texas (TX), United States	48.80 USD
Mon, 06/15/2020	Austin, Texas (TX), United States	61.00 USD
Tue, 06/16/2020	Austin, Texas (TX), United States	61.00 USD
Wed, 06/17/2020	Austin, Texas (TX), United States	61.00 USD

If you click on any day of the per diem it will show you what meal is **not** providing for that day with a check mark. In the example below on the first day 06/14/20 breakfast is checked off because the traveler left at 9:30 a.m. so no breakfast money will be allocated.

Deductibles

- Breakfast
- Lunch
- Dinner
- Additional Deduction

If you click the Next button it will show you each day of the per diem without leaving this screen.

The system will display your entries on the left-hand side of your screen. Here you will add up each per diem entry and double check that you calculated the 80% cash advance amount correctly. In this example the 100% per diem amount is \$231.80. 80% of that is \$185.44. I entered 80% per diem on my “header page” as \$125.68. How do I correct it?

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD

PA Report ID: 010000431869 | Total Estimated Amount: 231.80 USD | Submit

I am going to click on the report header name.

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD

PA Report ID: 010000431869 | Total Estimated Amount: 231.80 USD | Submit

Click Open

The screenshot shows the Chrome River interface. At the top, there is a navigation bar with the Chrome River logo, a '+ New' button, and the user name 'Patricia Jackson'. Below this is a 'Draft Pre-Approvals' section. A list of drafts is shown, with one entry for 'P_Jackson_Austin TX_061420' dated '06/18/2020' and an amount of '231.80 USD'. To the right of this list are buttons for 'Open', 'Delete', and 'PDF'. A blue arrow points to the 'Open' button. Below the list, the details for the selected draft are shown, including 'Report Owner', 'Created By', 'Create Date', 'Pay Me Amount', 'PA Report ID', 'From Date', 'To Date', and 'Business Purpose'. An 'Expense Summary' table is also visible at the bottom right.

	AMOUNT (USD)	SUBMITTED (USD)
Meals - Per Diem	231.80	0.00

Now click Edit and this will open up your header page.

The screenshot shows the Chrome River interface with the 'Pre-Approvals For Patricia Jackson' header page. The top navigation bar is the same. Below it, there is a 'Pre-Approvals For Patricia Jackson' section. A list of pre-approvals is shown, with one entry for 'P_Jackson_Austin TX_061420'. To the right of this list are buttons for 'PDF', 'Images', 'Delete', and 'Edit'. A blue arrow points to the 'Edit' button. Below the list, the details for the selected pre-approval are shown, including 'Report Name', 'Start Date', 'End Date', 'Number of Days', 'Pay Me In', 'Business Purpose', 'Travel Justification', 'Cash Advance Amount', and 'Report Type'. A 'Submit' button is visible at the bottom right.

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD

PA Report ID 010000431869	Total Estimated Amount 231.80 USD	Submit
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Scroll down to the cash advance amount and change it to \$185.44

The screenshot shows the Chrome River Pre-Approvals interface for Patricia Jackson. On the left, a list of expenses is shown with a total estimated amount of 231.80 USD. On the right, the form details are as follows:

Field	Value
Report Name	P_Jackson_Austin TX_061420
Start Date	06/14/2020
End Date	06/17/2020
Number of Days	4
Pay Me In	USD - US Dollars
Business Purpose	1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.
Travel Justification	Optional
Cash Advance Amount	185.44

A blue arrow points from the 'Cash Advance Amount' field to the 'Save' button in the top right corner.

Click Save

This screenshot is identical to the one above, showing the same form details. A blue arrow now points directly to the 'Save' button in the top right corner of the form.

The cash advance is now correct and you can continue to enter other expenses by clicking on the + sign.

CHROME RIVER + New Patricia Jackson

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD

PA Report ID: 010000431869 | Total Estimated Amount: 231.80 USD | **Submit**

Pre-Approvals For Patricia Jackson

Report Name: P_Jackson_Austin TX_061420

Start Date: 06/14/2020

End Date: 06/17/2020

Number of Days: 4

Pay Me In: USD - US Dollars

Business Purpose: 1. What is the purpose of the travel? To learn of any changes in the Title IV program s. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.

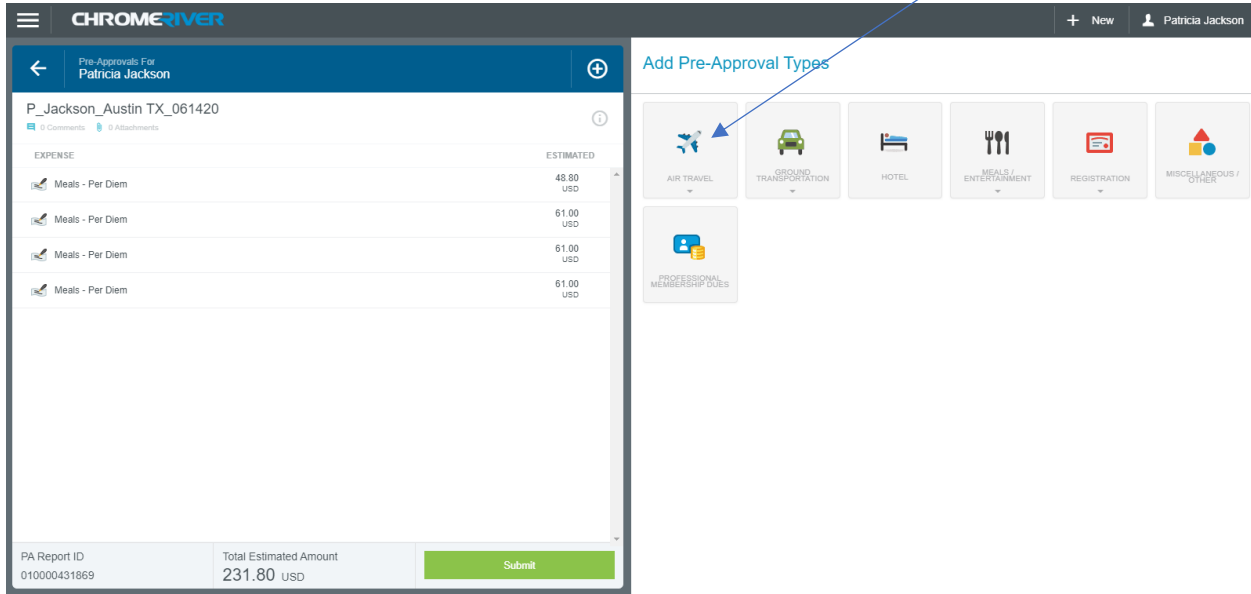
Travel Justification:

Cash Advance Amount: 185.44

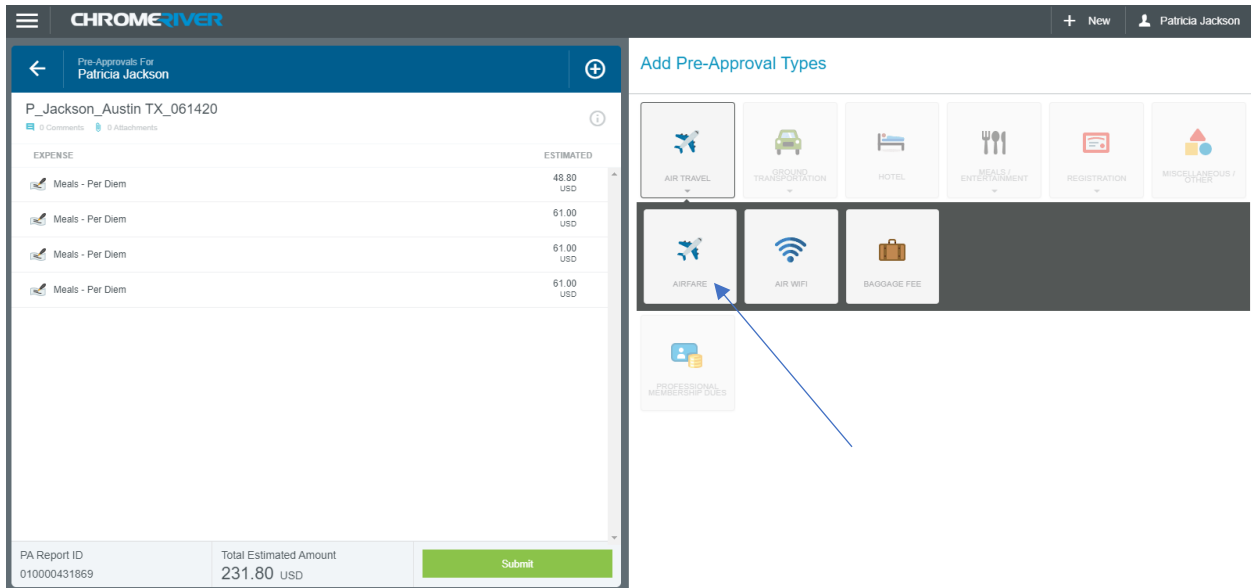
Report Type: Employee Travel

Pre-Approval estimate – Airfare

You are now back at the expense's dashboard. Select the Airfare tile.

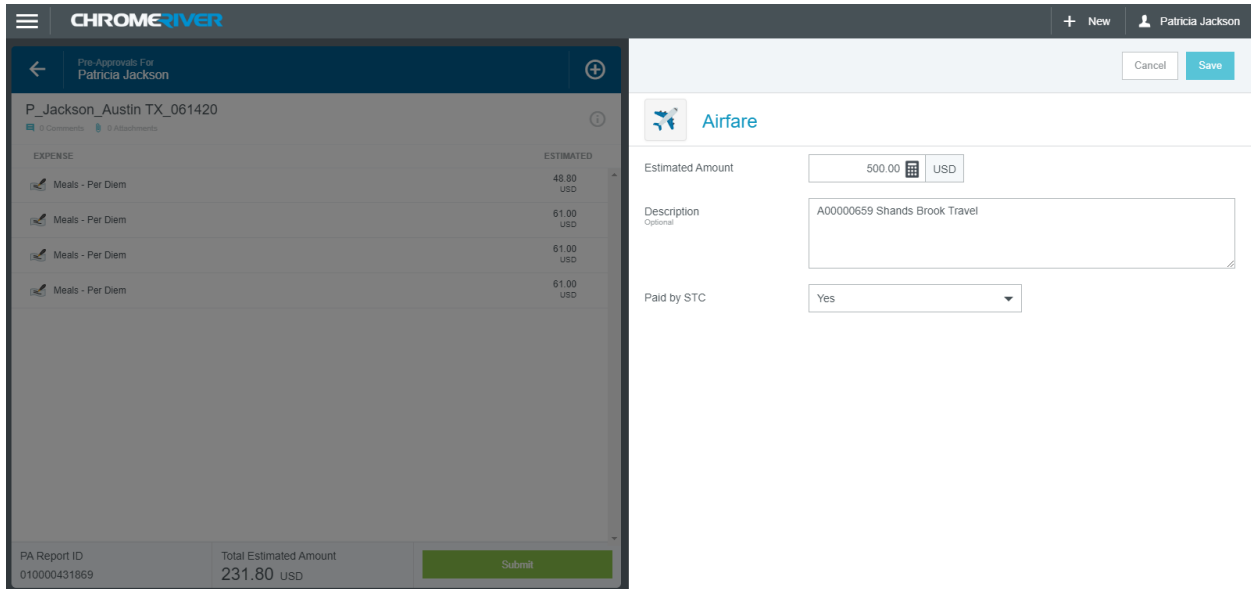


This will populate a secondary set of mosaics. The only one you should ever select is Airfare. The air wi-fi and baggage fees will be used on the expense report if necessary (post trip). Click Airfare.



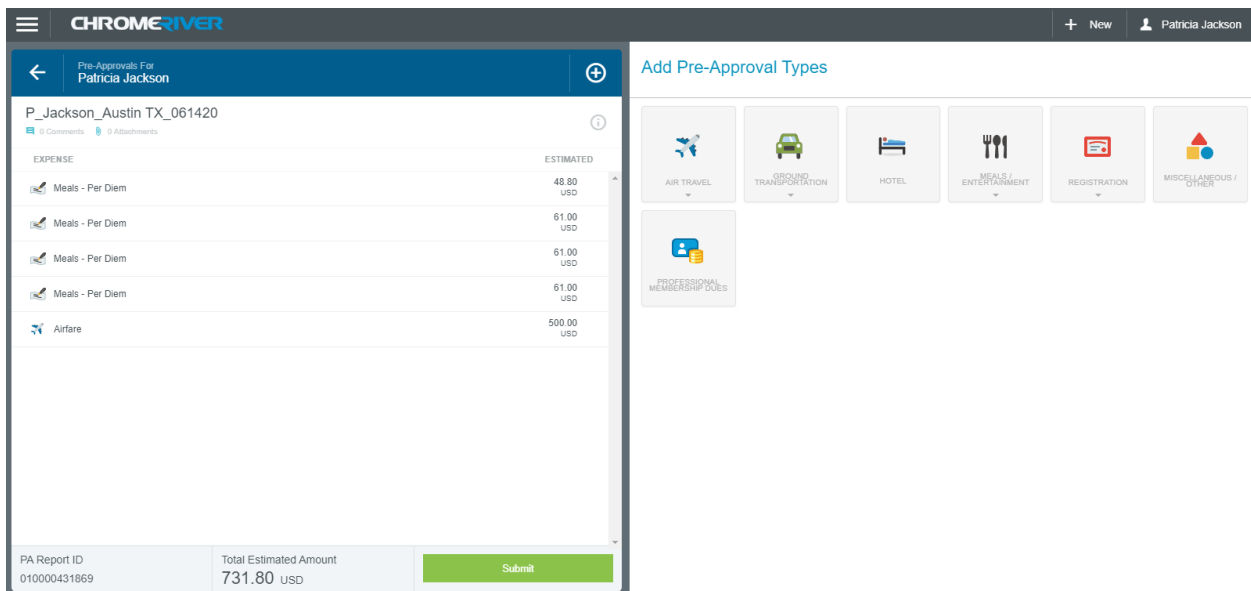
The system will bring you to the expenses screen. Here you will enter the estimated amount of the airfare from the Travel Agency airfare quote. The description should be the vendors A# and vendor

name then select paid by STC Yes or No. ****Note: If you select no because the traveler has paid for his/her own airfare it will not be paid to them until after the trip on the expense report.**



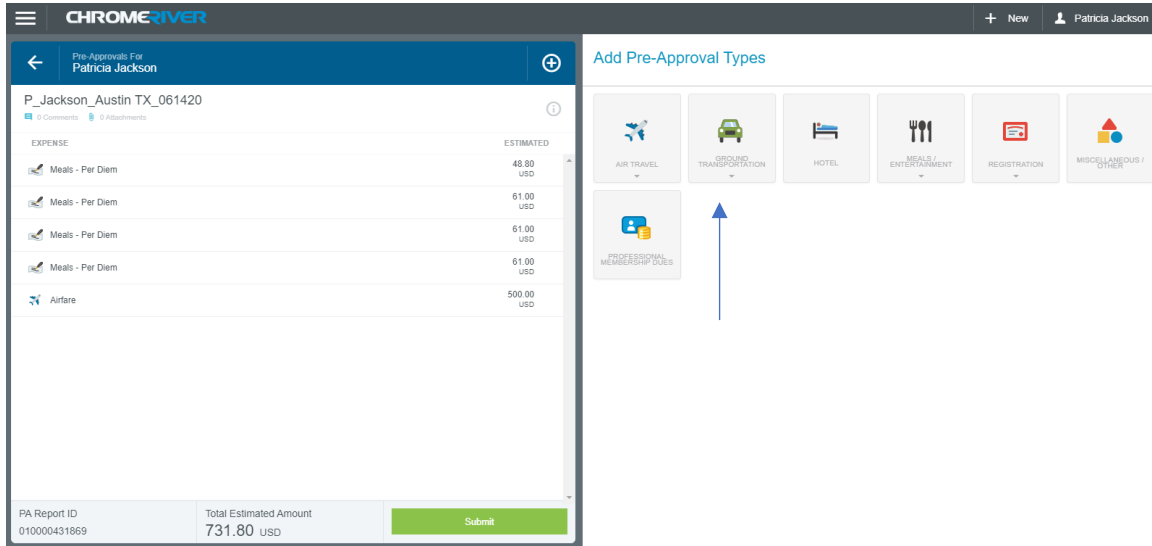
If everything looks correct go ahead and click Save. *****Note: You can see on the screen that there is no option to attach a document. You will attach the documents after you enter all the expenses.**

The system will take you back to the expenses dashboard. You will notice that once you save it displays the expense on the left-hand side of your screen.

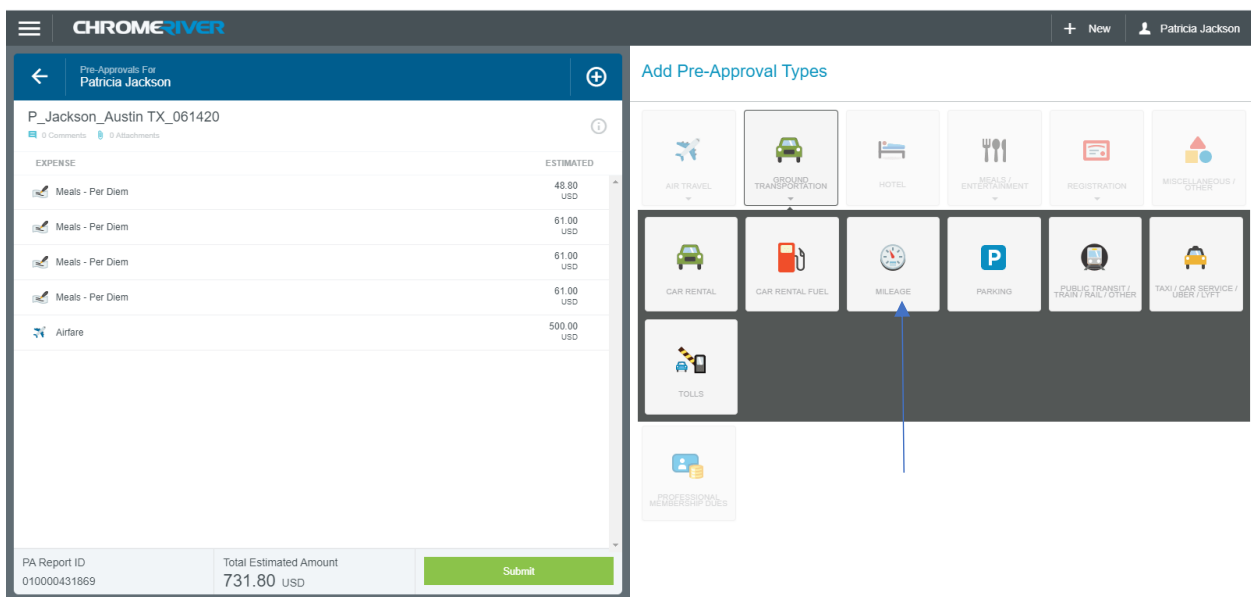


Pre-Approval Expense – Mileage for trip

If the traveler chooses to drive instead of fly you will select Ground Transportation. **DO NOT leave airfare quote line in Chrome River expense report if only price example** – it will generate a purchase order and the Purchasing department will send it to the Travel Agency for a flight ticket to be issued. *****Note: an airfare quote will need to be uploaded as comparison on prices. If the airfare quote is less than the mileage calculated by the system the traveler will be paid the airfare quote because that is what would have been more beneficial to the college.**

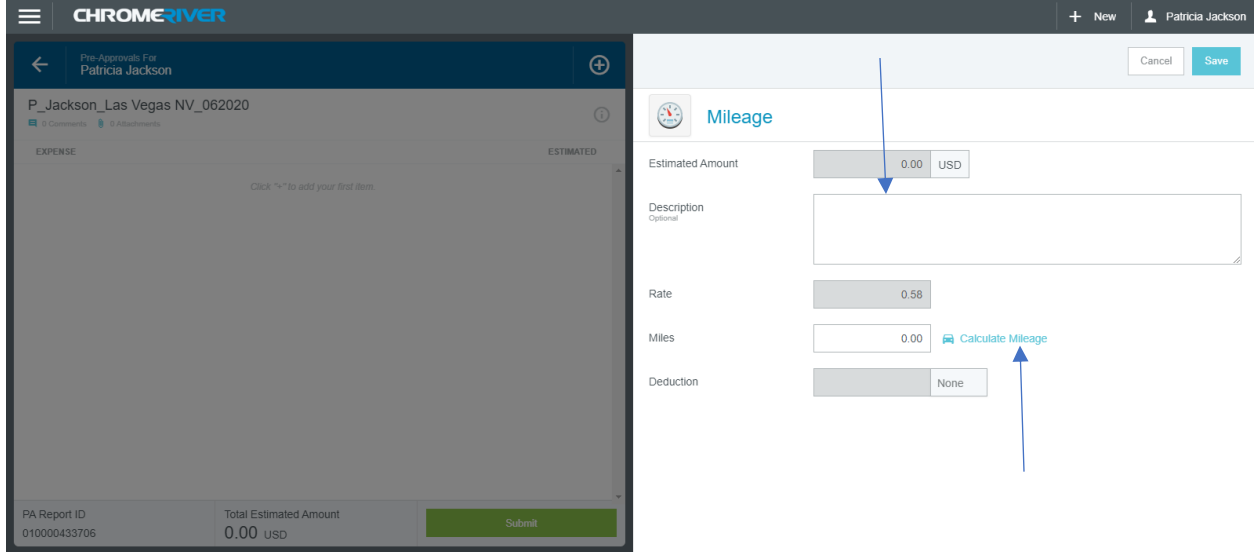


Select the mileage tile

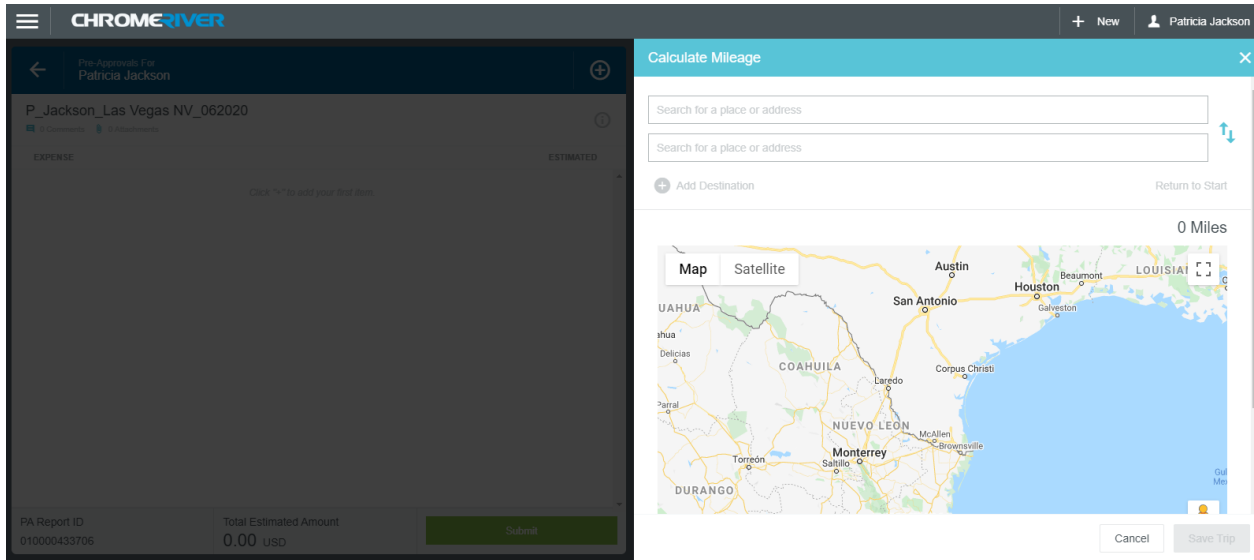


The system will bring you to this screen.

Click calculate miles

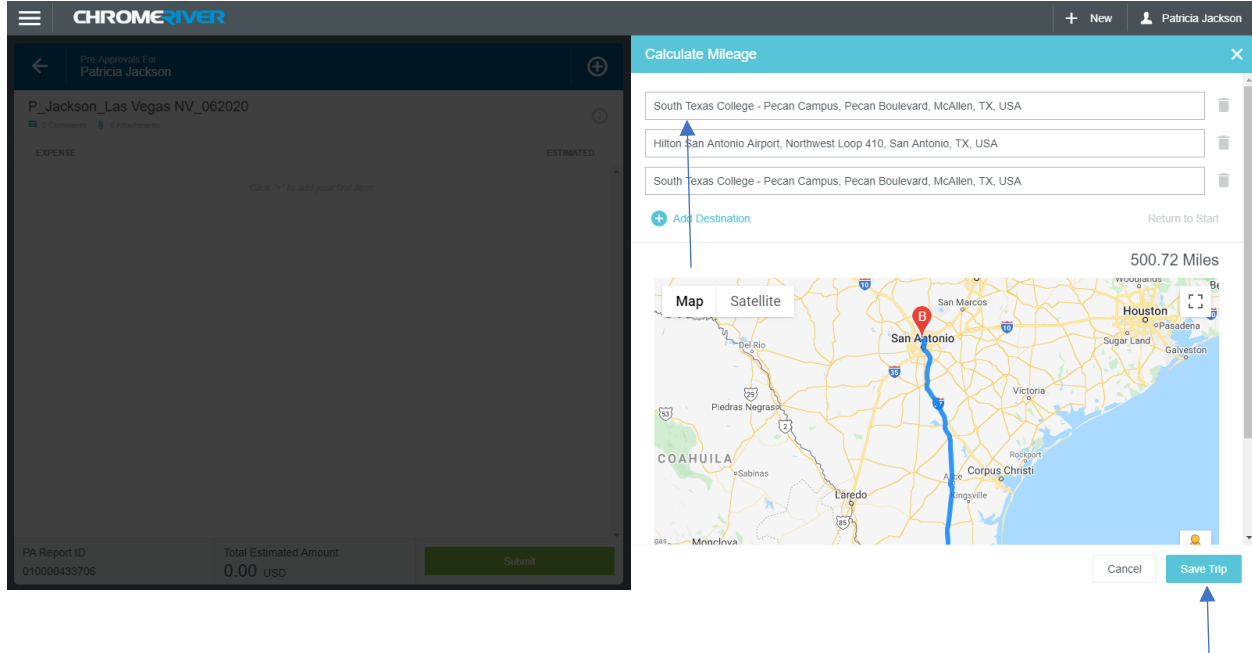


The system will take you to the the google maps option to enter the departure address and the arrival address

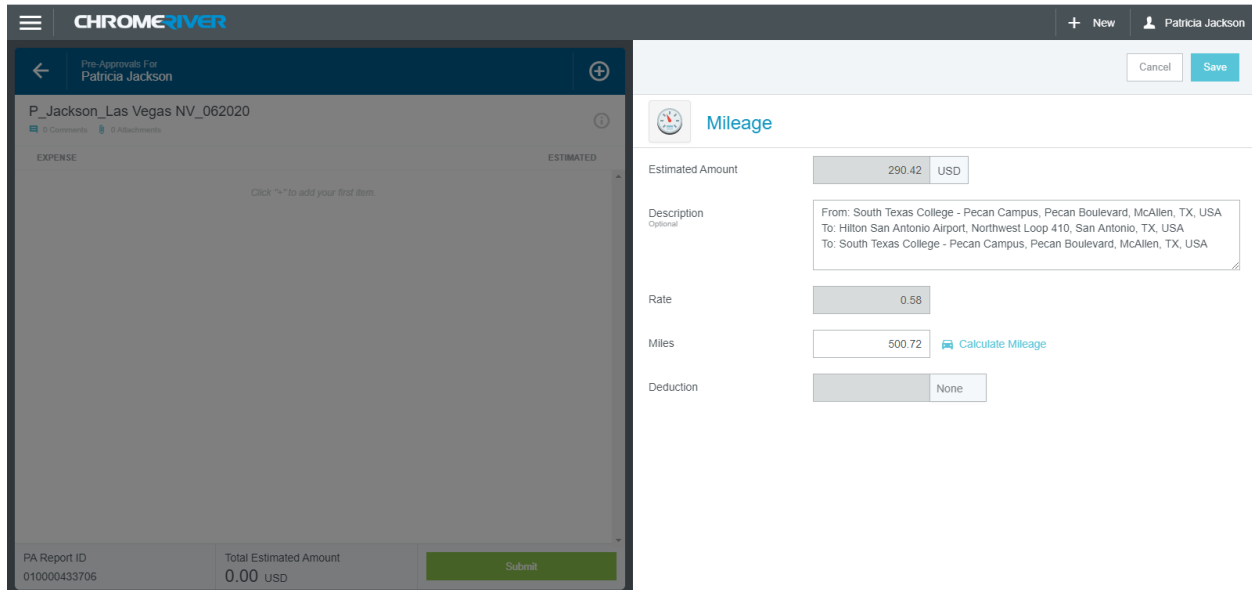


A Round trip calculation is required: In this example I am going to use leaving the Pecan Campus and arriving at my hotel.

Then I am going to click add a destination or return to start to create a roundtrip estimate to return to Pecan Campus. If the return is to a different location then click a destination and click “save trip”.



The system will take me back to the expenses screen where the calculations have been made for me and the description has been pre-filled with the trip details.



Click Save

The screenshot shows the CHROME RIVER software interface. At the top, there is a navigation bar with the CHROME RIVER logo on the left and '+ New' and 'Patricia Jackson' on the right. Below the navigation bar, there is a header for 'P_Jackson_Las Vegas NV_062020' with a back arrow on the left and a plus sign on the right. The main content area is split into two columns. The left column is titled 'EXPENSE' and 'ESTIMATED' and contains a large grey area with the text 'Click "+" to add your first item'. The right column is titled 'Mileage' and contains several input fields: 'Estimated Amount' (290.42 USD), 'Description' (Optional) with a text box containing 'From: South Texas College - Pecan Campus, Pecan Boulevard, McAllen, TX, USA', 'To: Hilton San Antonio Airport, Northwest Loop 410, San Antonio, TX, USA', and 'To: South Texas College - Pecan Campus, Pecan Boulevard, McAllen, TX, USA', 'Rate' (0.58), 'Miles' (500.72) with a 'Calculate Mileage' button, and 'Deduction' (None). At the bottom of the left column, there is a 'PA Report ID' (010000433705) and a 'Total Estimated Amount' (0.00 USD) with a green 'Submit' button. A blue arrow points to the 'Save' button in the top right corner of the interface.

This action will now display the expense on the left-hand side of your screen with your other expenses.

Pre-Approval estimate – Ground Transportation – Car Rental

Select another expense. Let's try Ground Transportation (this includes car rental, fuel, mileage, parking,

CHROME RIVER

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD

PA Report ID: 010000431869 | Total Estimated Amount: 731.80 USD | Submit

Add Pre-Approval Types

- AIR TRAVEL
- GROUND TRANSPORTATION
- HOTEL
- MEALS / ENTERTAINMENT
- REGISTRATION
- MISCELLANEOUS / OTHER
- PROFESSIONAL MEMBERSHIP DUES

The system will display a second set of mosaics. *****Note: The only ones that you can use on the pre-approval is car rental and mileage.** All others will be used on the expense report if necessary.

Select the car rental mosaic.

CHROME RIVER

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD

PA Report ID: 010000431869 | Total Estimated Amount: 731.80 USD | Submit

Add Pre-Approval Types

- AIR TRAVEL
- GROUND TRANSPORTATION
- HOTEL
- MEALS / ENTERTAINMENT
- REGISTRATION
- MISCELLANEOUS / OTHER
- CAR RENTAL
- CAR RENTAL FUEL
- MILEAGE
- PARKING
- PUBLIC TRANSIT / TRAIN / RAIL / OTHER
- TAXI / CAR SERVICE / UBER / LYFT
- TOLLS
- PROFESSIONAL MEMBERSHIP DUES

The system will take you to this screen. The estimated amount will be the amount on the car rental quote/reservation. The description will be the A# and the vendor's name. Paid by STC select Yes or No
*****Note: If you select Yes to be paid by STC it will require a requisition number. The system will not let you continue unless that required field has a number.**

If you are sure everything is correct click Save

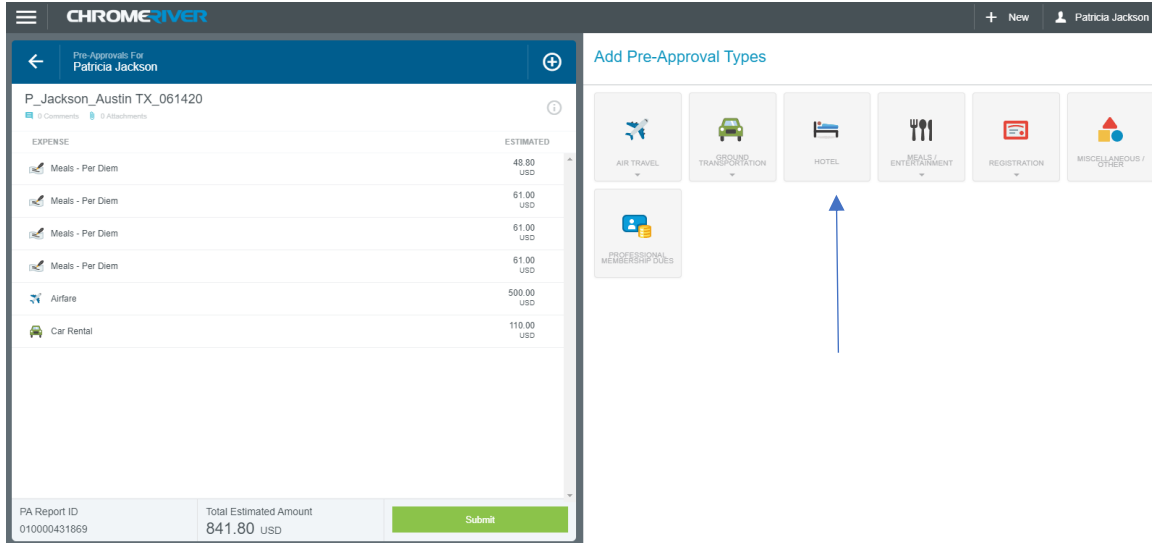
The screenshot displays the CHROME RIVER system interface. On the left, a sidebar shows a list of expenses for Patricia Jackson, including Meals - Per Diem and Airfare. The main area is titled 'Car Rental' and contains the following fields:

- Estimated Amount: 110.00 USD
- Description: A00464964 Enterprise Car Rental
- Paid by STC: Yes
- Please provide REQ/PO number for car rental: R0033181

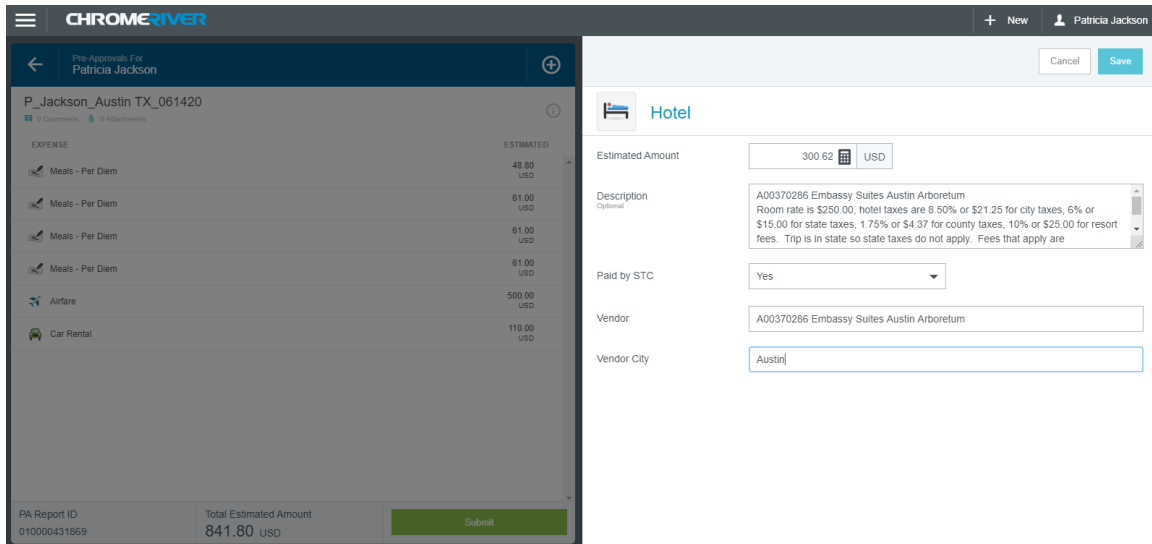
At the bottom left, a summary bar shows the PA Report ID (010000431869) and the Total Estimated Amount (731.80 USD). A green 'Submit' button is located at the bottom right of this bar. A blue arrow points to the 'Save' button in the top right corner of the form area.

Pre-Approval Expense – Hotel/Lodging

The system will take you back to the expenses screen where you can add another expense. The expenses continue to be added to the left of your screen. Click on the Hotel tile.



The estimated amount will come from the hotel reservation. The description will be the vendors A# and vendor name, hotel tax percentages and amounts, and if the hotel provides breakfast. *****Note: You must call the hotel and ask them about all the taxes they charge on the room and if they have any additional fees like resort fees, county taxes, or tourism fee. You will need to ask them for the breakdown of each amount charged and percentage of each tax amount. This should equal the total amount on the reservation. Do not forget to request the W-9 once you have them on the line.** Paid by STC select Yes or No. If you select yes Vendor and Vendor City will appear. Vendor – **Provide A# if it is a vendor in Banner with the name of the hotel. If a new vendor then put New Vendor and the name of the hotel.** Vendor City is the city the traveler is staying in. If you are sure everything is correct, click Save



The system will take you back to the expenses screen.

CHROME RIVER + New Patricia Jackson

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD

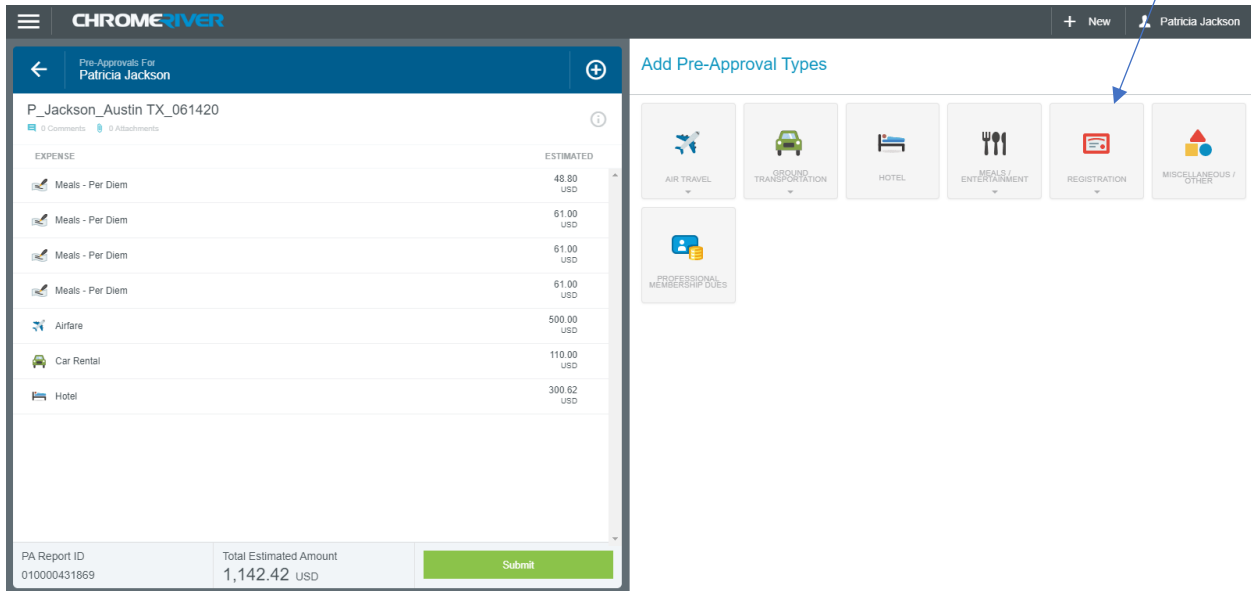
PA Report ID: 010000431869 | Total Estimated Amount: 1,142.42 USD | **Submit**

Add Pre-Approval Types

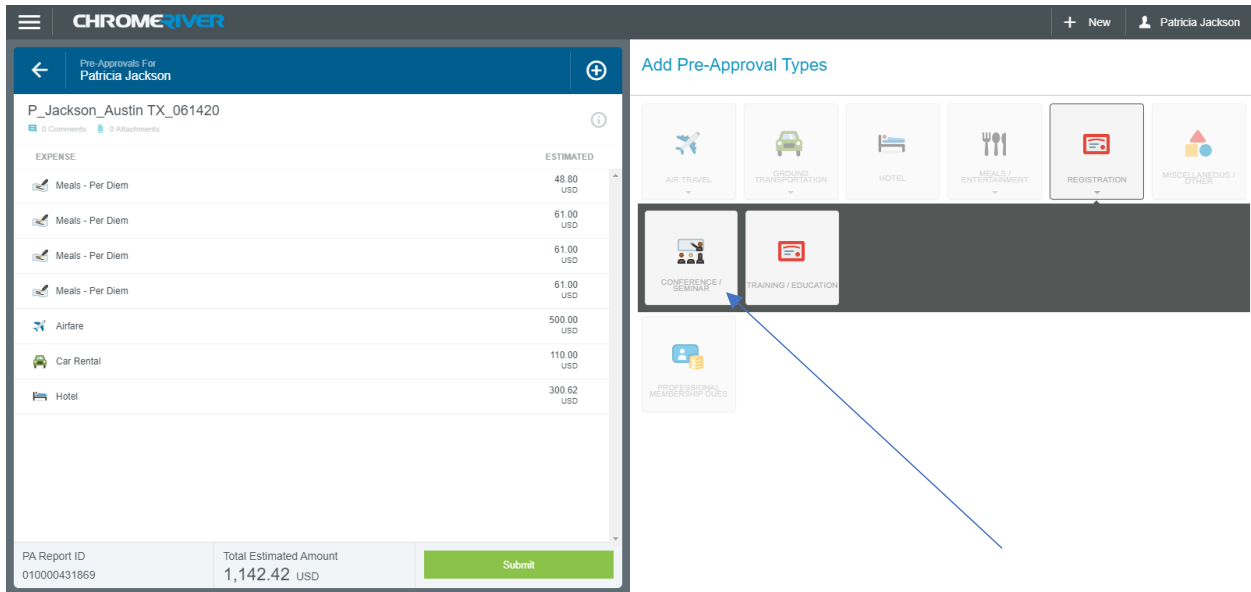
- AIR TRAVEL
- GROUND TRANSPORTATION
- HOTEL
- MEALS / ENTERTAINMENT
- REGISTRATION
- MISCELLANEOUS / OTHER
- PROFESSIONAL MEMBERSHIP DUES

Pre-Approval Expense – Registration

Click the Registration button.



The system will populate a second set of mosaics which include either Conference/Seminar or Training/Education. Make sure to pick the appropriate one.



In this example I am selecting Conference/Seminar.

*****Note: Training/Education pertain to training necessary for your job or job functions.**

Estimated amount will be the cost of the seminar. The description will be the vendors A# and vendor name plus any notes that may be needed. IE: is there an early bird registration deadline or a late fee if not paid by a certain date. Paid by STC select Yes or No. If the registration fee is over \$1,500.00 an approved STC Promissory Note needs to be uploaded.

*****Note: If an employee is taking a Webinar or attending an STC held event a pre-approval authorization is not required. If a registration fee must be paid it needs to go through a requisition and not the Chrome River system.**

CHROME RIVER + New Patricia Jackson

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD

PA Report ID: 010000431869 Total Estimated Amount: 1,142.42 USD **Submit**

Conference / Seminar

Estimated Amount: 500.00 USD

Description: A00461448 Educause Inc
Early Bird registration is due on 05/25/2020 if not registration fee will go up.

Paid by STC: No

Cancel Save

At this point if you click Yes STC will pay, you will get more questions to answer.
 Is employee already registered? Answer Yes or No.
 Does employee need to login to make payment? Answer Yes or No.
 Please provide any contact information to allow us to process the payment (email, phone, etc.) Provide as much information as you can.
 Please provide any additional info needed for registration.
 Please provide registration deadline = The date the registration fee needs to be paid.
 The end product should look like this screen. If you are sure everything is correct click the save button.

CHROME RIVER + New Patricia Jackson

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD

PA Report ID: 010000431869 Total Estimated Amount: 1,142.42 USD **Submit**

Conference / Seminar

Estimated Amount: 500.00 USD

Description: A00461448 Educause Inc
Early Bird registration is due on 05/25/2020 if not registration fee will go up.

Paid by STC: Yes

Is employee already registered? Yes

Does employee need to login to make payment? No

Please provide any contact information to allow us to process the payment (email, phone, etc.): susan.watkins@educause.org 512-387-2089

Please provide any additional info needed for registration: Pease make payment to Educause Inc. They do not take credit cards

Please provide deadline for registration: 05/20/2020

Cancel Save

Pre-Approval Expense – Membership

This will take you back to the expenses screen. Best practices would be to process Membership prior to conference through a Purchase Order. However, if conference attendance requires membership or if membership will decrease registration amount you may include the membership through Chrome River with Financial Manager approval.

NOTE: Purchase order is still required – please ensure that the online purchase requisition is processed prior to Chrome River entry, paperwork is submitted to both Purchasing and AP, and that the Institutional Membership form is completed. If anything is delayed, Registration and Membership payment might not be able to be completed timely.

Click the Professional Membership Dues.

The screenshot shows the Chrome River interface for a Pre-Approval report. On the left, a table lists expenses with their estimated amounts. On the right, a panel titled 'Add Pre-Approval Types' contains several icons representing different expense categories. The 'PROFESSIONAL MEMBERSHIP DUES' icon is highlighted with a blue arrow.

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD
Conference / Seminar	500.00 USD

PA Report ID: 010000431869 | Total Estimated Amount: 1,642.42 USD | Submit

The system will bring you to this next screen:

The screenshot shows the Chrome River interface for the 'Professional Membership Dues' form. The form includes fields for 'Estimated Amount' (0.00 USD), 'Description' (Optional), and 'Paid by STC' (a dropdown menu). The background shows the same expense list as the previous screenshot.

Professional Membership Dues

Estimated Amount: 0.00 USD

Description (Optional):

Paid by STC: -- Select --

PA Report ID: 010000431869 | Total Estimated Amount: 1,642.42 USD | Submit

Enter the membership fees from the membership form. On the Description you will enter the A# for the vendor and the name of the vendor. *****Notes: If we are paying a membership fee you need to upload an approved STC institutional membership form. Also include the online requisition number – Purchasing will require to process PO.**

If the information is correct press Save.

The screenshot displays the CHROME RIVER system interface. The top navigation bar includes the CHROME RIVER logo, a '+ New' button, and the user name 'Patricia Jackson'. The main content area is divided into two panels. The left panel, titled 'Pre-Approval For Patricia Jackson', shows a list of expenses for 'P_Jackson_Austin TX_061420'. The right panel, titled 'Professional Membership Dues', contains the following fields:

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD
Conference / Seminar	500.00 USD

At the bottom of the left panel, the PA Report ID is 010000431869 and the Total Estimated Amount is 1,642.42 USD. A green 'Submit' button is located at the bottom right of the left panel. The right panel has a 'Save' button highlighted with a blue arrow.

Uploading Attachments

After you have entered all expenses that need approval for the trip, you should be back at the main screen for the document. Now attachments may be uploaded. The system will bring you back to the expenses screen. Click on the Report Name

CHROME RIVER + New Patricia Jackson

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE ESTIMATED

Meals - Per Diem	48.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD
Conference / Seminar	500.00 USD
Professional Membership Dues	125.00 USD

PA Report ID: 010000431869 Total Estimated Amount: 1,767.42 USD **Submit**

Add Pre-Approval Types

- AIR TRAVEL
- GROUND TRANSPORTATION
- HOTEL
- MEALS / ENTERTAINMENT
- REGISTRATION
- MISCELLANEOUS / OTHER
- PROFESSIONAL MEMBERSHIP DUES

Click Open

CHROME RIVER + New Patricia Jackson

Submitted Pre-Approvals

P_Jackson_Austin TX_061420	06/18/2020	1,767.42 USD	APPROVED
P_Jackson_Austin TX_061420	06/18/2020	1,767.42 USD	USED / EXPIRED
P_Jackson_Austin TX_062320	06/15/2020	1,767.42 USD	APPROVED
TEST_P_Jackson_Sedona AZ_061520-061820	05/29/2020	560.28 USD	PENDING
P_Jackson_Mileage Enc_090119-083120	05/21/2020	1,582.24 USD	PARTIALLY APPLIED
teststttestsetsateateateatwet	05/20/2020	183.00 USD	PENDING
TEST_Packson_Indistrictmileage_040120-043020	05/13/2020	0.00 USD	USED / EXPIRED
TEST_P_Jackson_nonstudentmileage_050120-051020	05/13/2020	0.00 USD	USED / EXPIRED
Testing cash advance on mileage	03/05/2020	183.24	

P_Jackson_Austin TX_061420

Report Owner: Patricia Jackson

Created By: Patricia Jackson

Create Date: 06/18/2020

Pay Me Amount: 1,767.42 USD

PA Report ID: 010000431869

From Date: 06/14/2020

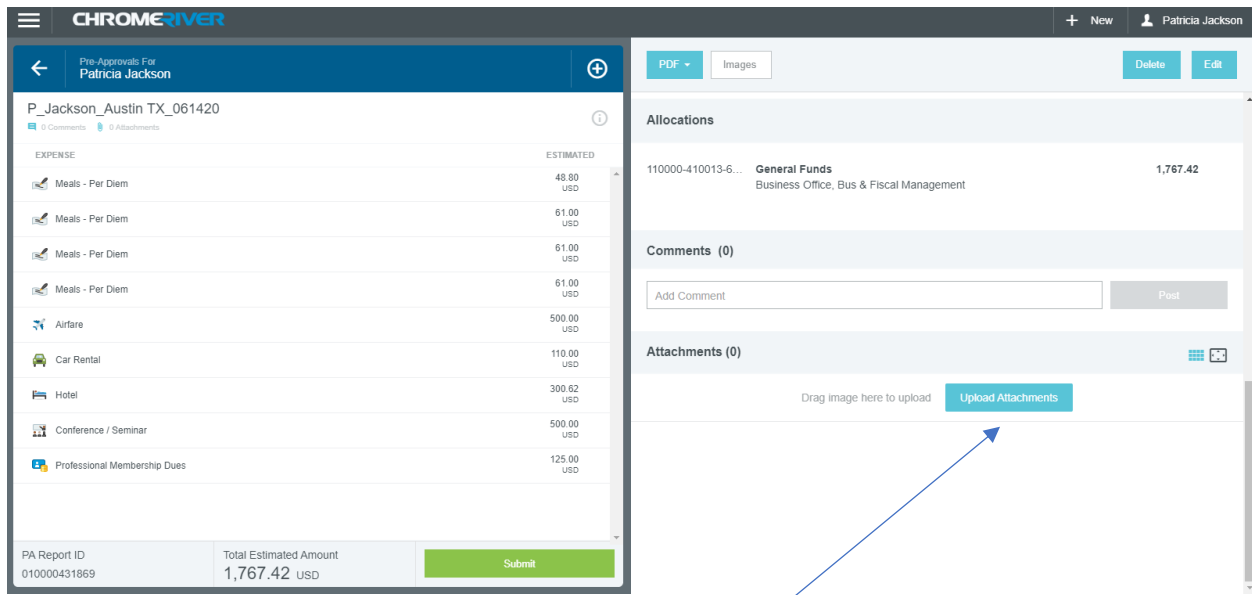
To Date: 06/17/2020

Business Purpose: 1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.

Prior Approvers

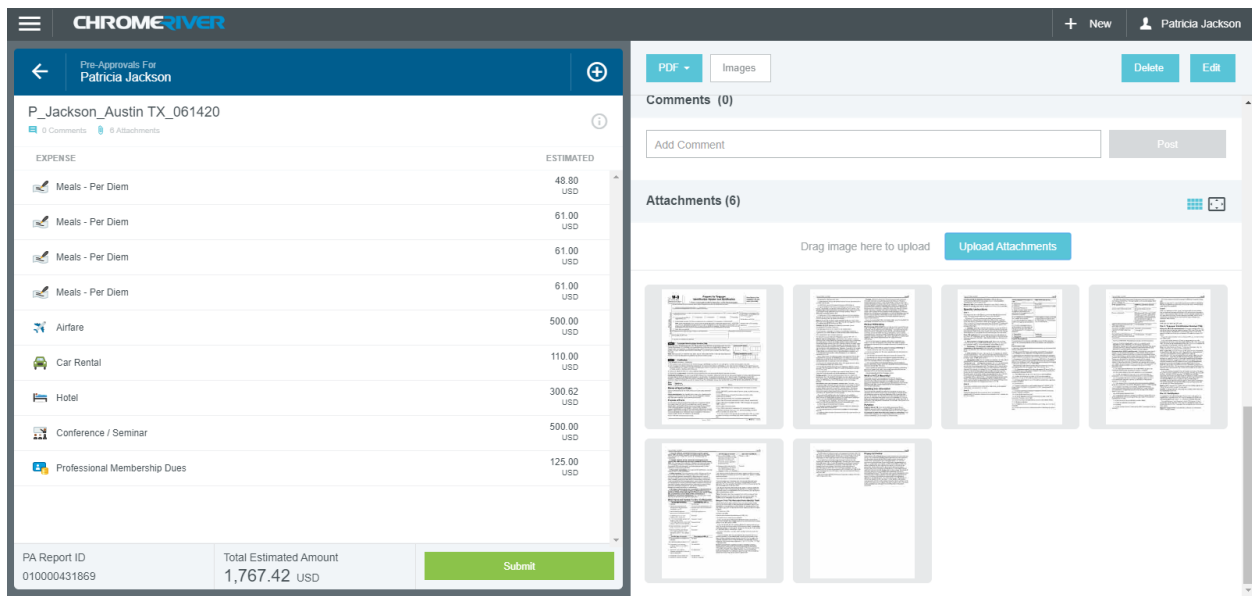
APPROVER	DATE
Giovanni Colin	06/18/2020

If I scroll all the way to the bottom of the screen you will see the upload attachments button



Click the upload attachments and go to the location where you have all the documents for this trip. ***This includes but is not limited to: The most current IRS Version of the W-9 form for any vendors that do not have one on file in Banner or is a new vendor, signed tax exempt form if in state travel, airfare quote, registration form, membership form, institutional membership form, car rental reservation, hotel reservation with amounts of stay, etc. ***Note: Do not upload car insurances or driver's licenses. Those will still go the traveloffice@southtexascollege.edu email.***

The screen will look as follows:



Before saving make sure to review what you have uploaded by clicking on an image. We want one upload with all the documents. If everything is correct click Save.

CHROME RIVER + New Patricia Jackson

Pre-Approval For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE	ESTIMATED
Meals - Per Diem	48.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD
Conference / Seminar	500.00 USD
Professional Membership Dues	125.00 USD

PA Report ID: 010000431869 | Total Estimated Amount: 1,767.42 USD | Submit

Comments (0) | Cancel | Save

Attachments (6) | Drag image here to upload | Upload Attachments

Pre-approval – Mileage

(Authorizations to travel for In District Mileage)

Every STC approved mileage request requires a Mileage encumbrance request to be on file with the Travel office. Please refer to Travel Guidelines for deadlines and best practices on submission of in district mileage.

Please remember that only authorized South Texas College employees can travel on behalf of the College, all STC employees traveling on college related business must have a valid driver license and vehicle insurance. It is the Financial Manager’s responsibility to verify employees are eligible to travel.

Note: *Attachments for Pre-Approvals-Mileage encumbrances are welcome, but not mandatory. They are **required** on the Expense Report (previously Travel Voucher-TR doc).*

See the pages above marked “Uploading Attachments” if you wish to upload attachments to your Pre-Approval – Mileage request.

Report Types can be:

- A. Employee Travel
- B. Non-Student Club Travel (Fund 3)
- C. Student Club Travel (Fund 8) – DO NOT select for mileage
- D. Student Employee Grant Travel (Fund 2)

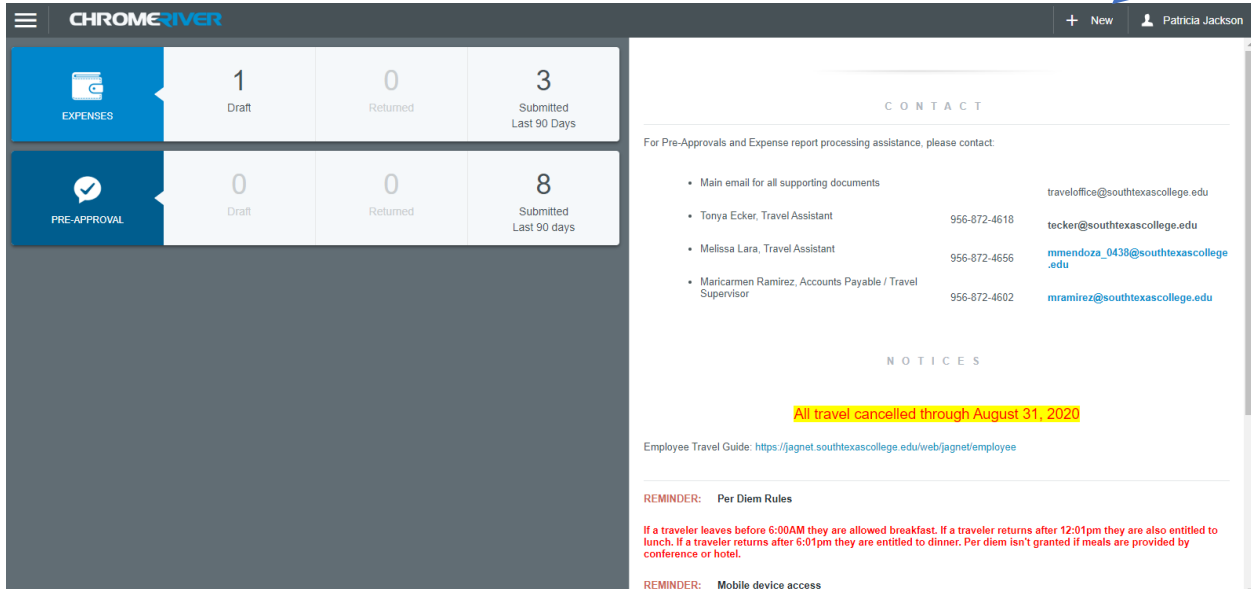
Travel Types further identify what kind of travel the trip is for. Travel types for In District Mileage can ONLY be:

- In District Mileage

Create a Pre-Approval - Mileage

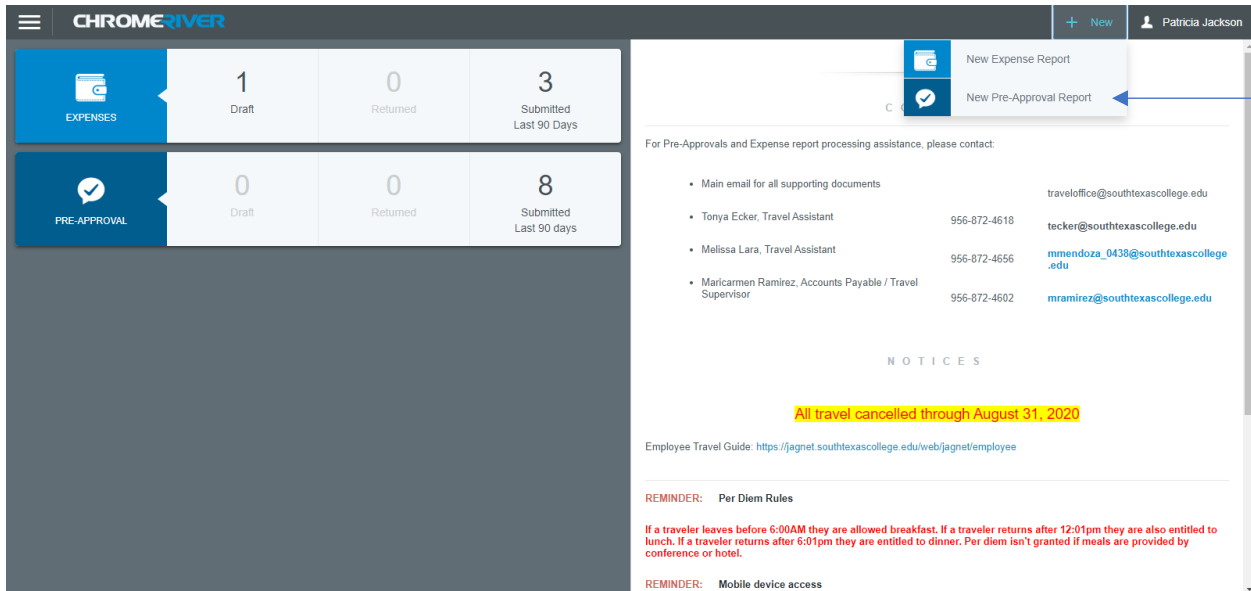
Previously: Travel Authorization (In District Mileage)

Log into Chrome River via Jagnet. Click the +New button.



The screenshot shows the Chrome River dashboard. On the left, there are two main sections: 'EXPENSES' and 'PRE-APPROVAL'. The 'EXPENSES' section has a 'Draft' count of 1 and 'Submitted Last 90 Days' of 3. The 'PRE-APPROVAL' section has a 'Draft' count of 0 and 'Submitted Last 90 Days' of 8. On the right, there is a 'CONTACT' section with a list of contacts and a 'NOTICES' section with a yellow highlighted notice: 'All travel cancelled through August 31, 2020'. A blue arrow points to the '+ New' button in the top right corner of the dashboard.

A drop-down menu will appear and you will click the New Pre-Approval Report option.



The screenshot shows the Chrome River dashboard with the '+ New' button dropdown menu open. The menu has two options: 'New Expense Report' and 'New Pre-Approval Report'. A blue arrow points to the 'New Pre-Approval Report' option. The rest of the dashboard content is the same as in the previous screenshot.

The system will take you to this screen. This is to enter your report name header.

The screenshot shows the Chrome River interface for creating a pre-approval report. The left sidebar shows a navigation menu with 'Pre-Approvals For Patricia Jackson' selected. The main content area displays the form with the following fields: Report Name (text input), Start Date (calendar icon), End Date (calendar icon), Number of Days (text input with value 0), Pay Me In (dropdown menu showing USD - US Dollars), Business Purpose (text area), Travel Justification (Optional) (text input), and Cash Advance Amount (Optional) (text input with value 0). A 'Submit' button is located at the bottom right of the form. A note at the bottom of the Business Purpose field reads: 'Please include the following elements in the Business Purpose field above, a) What is the purpose of the travel?, b) Why is the travel necessary and c) How does the travel benefit STC?'

You will enter the report name as follows:

Enter the Report Name (first letter of traveler's first name (underscore) full last name (underscore) In District Mileage(underscore) the dates of the entire fiscal year (example: *J_Smith_In District Mileage_090119-083120*). *****Note: The business purpose has to be more than 25 characters or you will get a warning.**

Enter the start date = the first day of the fiscal year

Enter the end date = the last day of the fiscal year

The Number of Days will populate on its own because it is determined by the start and end dates. The Pay Me In should always be in USD-US Dollars.

The Business Purpose will be the description of why you are claiming in district mileage *****Note: This field has a violation (hard stop) which requires you to enter more than 25 characters or you cannot proceed.** (IE: Homebase is Pecan but I am teaching at Mid Valley on Tuesdays and Thursdays (See attached teaching schedule)

The Travel Justification is optional because you already have that in the business purpose box.

Cash Advance Amount will always be 0 because we do not give cash advances on in district mileage.

Select the Report Type from the drop-down list.

The options are as follows:

- a.) Employee Travel = Any travel that is being paid for by a fund that does not start with **2, 3, or 8**.
- b.) Non-Student Club Travel = Any travel that is being paid with a fund code that begins with a **3**.
- c.) Student Club Travel = Any travel that is being paid with a fund code that begins with an **8**.
- d.) Student Employee Grant Travel= Any travel that is being paid with a fund code that begins with a **2**.

Select the Travel Type
a.) In District Mileage

Answer the question “Is personal time included in this trip?” Yes or No

Answer the question “Is Dean approval required for this trip?” Yes or No.

*****Note: If your division does not report to a dean always select no.** (For this example, I am going to answer yes to the Dean approval question.)

Traveler ID will be populated on its own and it will be the A# of the traveler.

Now enter the allocation/FOAPL you will be using to pay for the travel.

*****Note: This option has a drop-down menu of all organizations. If you click within the box it will display them. You can also enter an organization code and it will populate the proper allocation/FOAPL. You will have to click on the allocation so that it moves up to the box. This system will allow for multiple allocations but you will need to split it between the FOAPL’s.**

All these steps are only to enter the “report header” for the pre-approval. The next steps will be to enter the pre-approval expenses. *****Note: You do not attach anything at this stage.** We are just creating the report header.

Your report header information should look as follows:

The screenshot displays the 'Pre-Approvals For Patricia Jackson' form in the CHROME RIVER system. The form is divided into two main sections. The left section, titled 'Pre-Approvals For Patricia Jackson', shows a table for 'EXPENSE' and 'ESTIMATED' amounts, with a total estimated amount of 0.00 USD. The right section, titled 'Pre-Approvals For Patricia Jackson', contains the following fields: Report Name (P_Jackson_In District Mileage_090119-083120), Start Date (09/01/2019), End Date (08/31/2020), Number of Days (366), Pay Me In (USD - US Dollars), Business Purpose (Homebase is Pecan but I am teaching at MidValley on Tuesdays and Thursdays), Travel Justification (Optional), and Cash Advance Amount (Optional, 0). A blue arrow points to the 'Save' button in the top right corner.

As you can see below – as you scroll down you will see more information to input, including “Dean approval”. **NOTE:** *The only Division that requires Dean approval is Academic Affairs, their deans are the only ones uploaded at this time.* In this example I have chosen “Yes” for the Dean approval. Also notice that I used an NAH organization in order to show you the Dean approval function. Click Save.

The screenshot shows a web form for reporting travel. It includes several dropdown menus and text input fields. A blue arrow points to the 'Is Dean approval required for this trip?' dropdown, which is set to 'Yes'. Another blue arrow points to the '+ Add Allocation' button. Below the form, a horizontal line is drawn.

Report Type	Employee Travel
Travel Type	In District Mileage
Is personal time included in this trip?	No
Is Dean approval required for this trip?	Yes
TravelerID	A00136468

Please type the FOAP Number/Name you would like to search for in the allocation box below. As you type, a drop down list of matching items will be displayed for selection

Allocations

110000-224005-1070 General Funds Associate Degree Nursing, Health Occup-Associate Degree Nurs

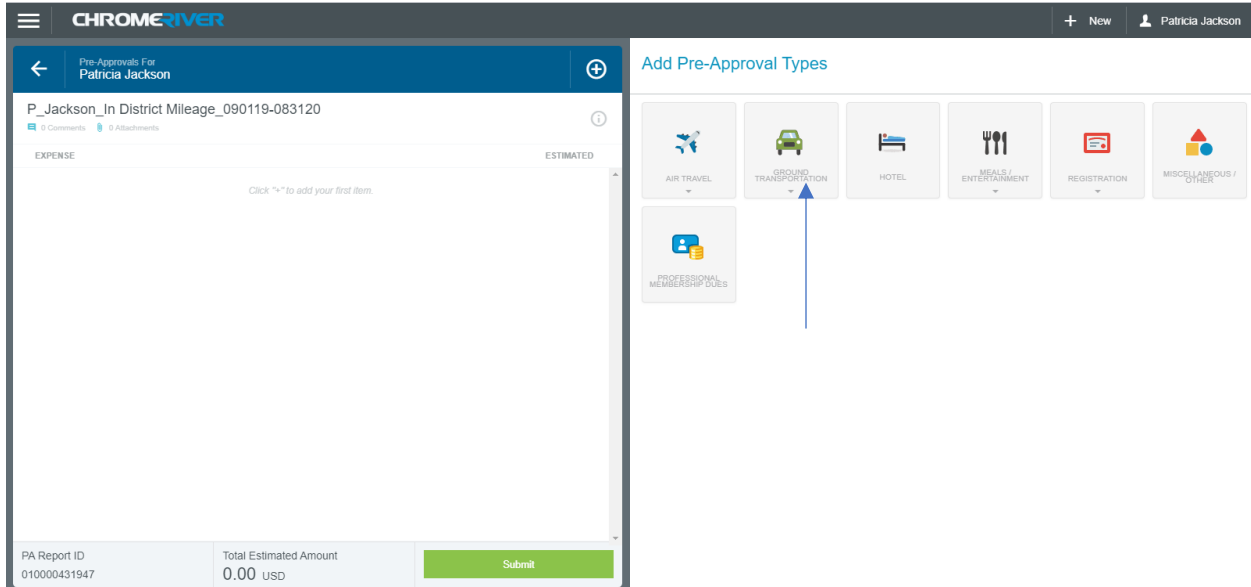
+ Add Allocation

Notice the + sign Add Allocation field. Here is where you can enter multiple FOAP’s if two departments are paying for a traveler’s mileage expenses. The system will split all expenses by the percentages that you enter for the split.

Entering Estimated Mileage

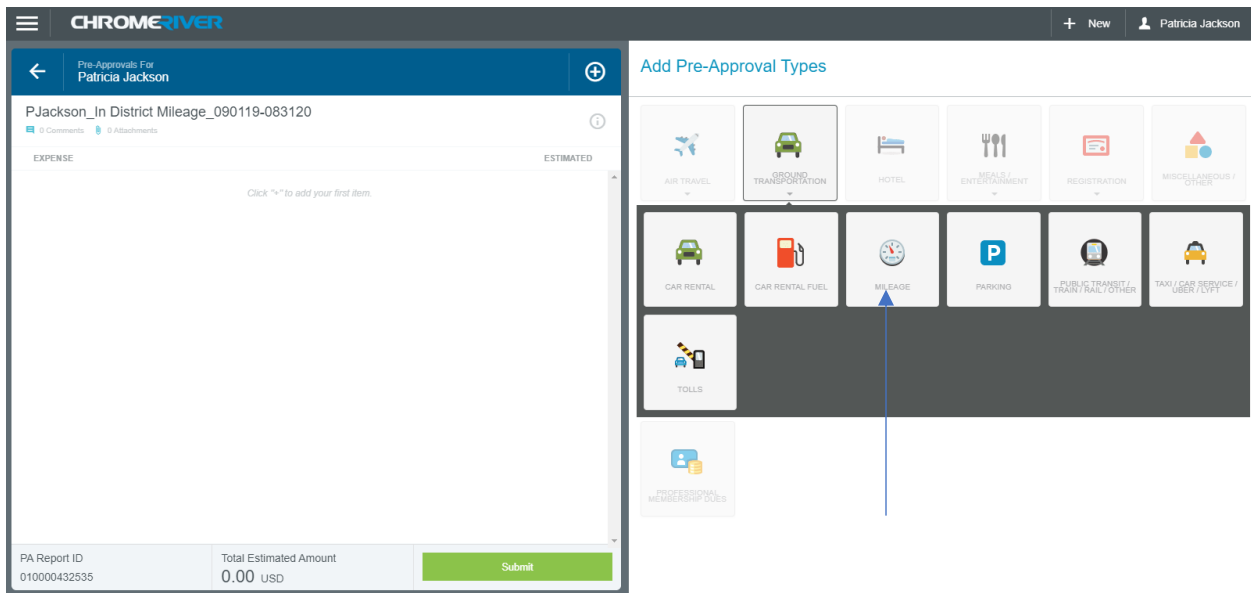
Once you save the system will take you to this screen:

Click Ground Transportation



The system will bring you to this screen:

Select Mileage.



For testing purposes, we will use an example for staff who submit mileage requests at the beginning of the fiscal year. Here you will enter the estimated number of miles the traveler will travel to and from Pecan to Mid-Valley. Please follow travel guidelines for submitting mileage encumbrance requests (at beginning of fiscal year, or at beginning of each semester).

The screenshot shows the Chrome River interface for a Mileage request. The left pane displays the report details for Patricia Jackson, including the PA Report ID 010000432535 and a total estimated amount of 0.00 USD. The right pane, titled 'Mileage', contains the following fields:

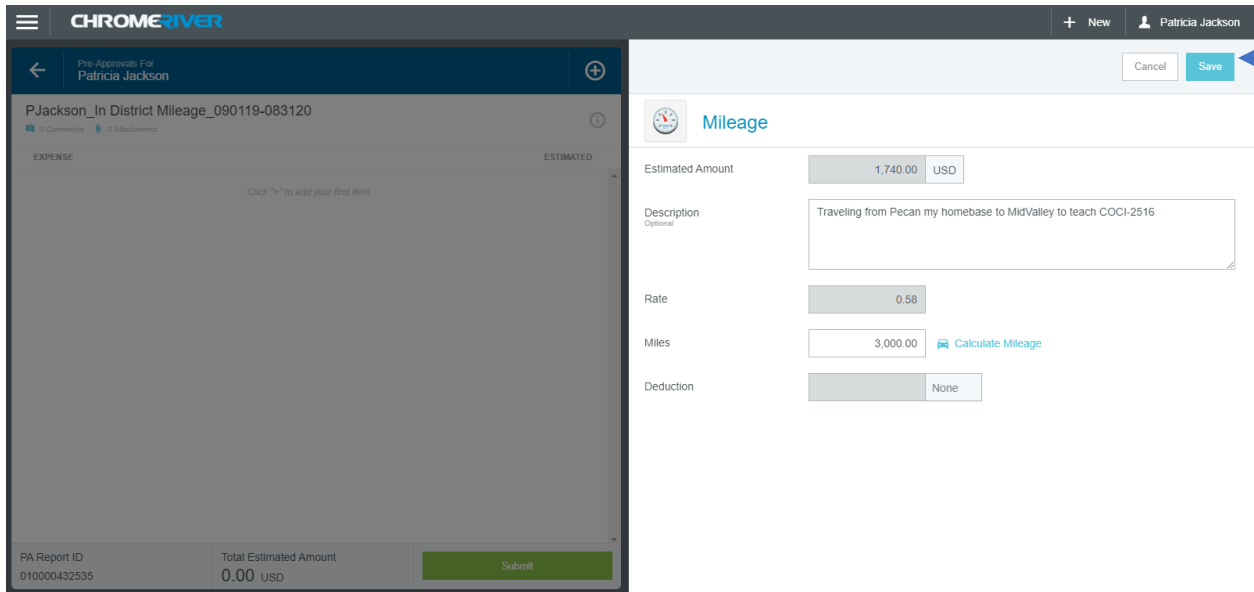
- Estimated Amount: 0.00 USD
- Description (Optional): Empty text box
- Rate: 0.58
- Miles: 0.00, with a 'Calculate Mileage' button
- Deduction: None

In this example I am going to add my description and estimated number of miles. I have selected 3,000 miles for the entire fiscal year. All my gray fields will populate on their own.

This screenshot shows the same Mileage form after updates. The 'Estimated Amount' has changed to 1,740.00 USD. The 'Description' field now contains the text 'Traveling from Pecan my homebase to MidValley to teach COCI-2516'. The 'Miles' field is updated to 3,000.00. The 'Rate' remains at 0.58 and 'Deduction' remains at None. The left pane shows the total estimated amount is still 0.00 USD.

The system allocated \$1,740.00 at 3,000 miles at .58 cents a mile. *****Note: The mileage rate may change at the beginning of the calendar year but if you simply overstate a little bit it should be ok.**

Click Save



CHROME RIVER

+ New Patricia Jackson

Cancel Save

Mileage

Estimated Amount: 1,740.00 USD

Description (Optional): Traveling from Pecan my homebase to MidValley to teach COCI-2516

Rate: 0.58

Miles: 3,000.00 [Calculate Mileage](#)

Deduction: None

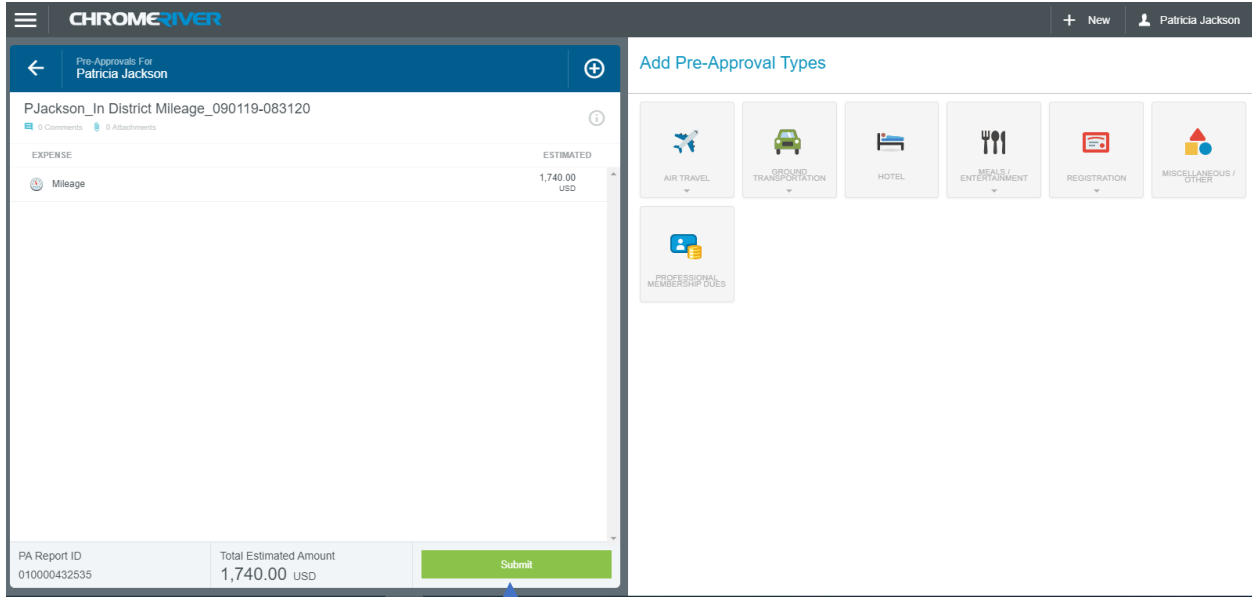
PA Report ID: 010000432535

Total Estimated Amount: 0.00 USD

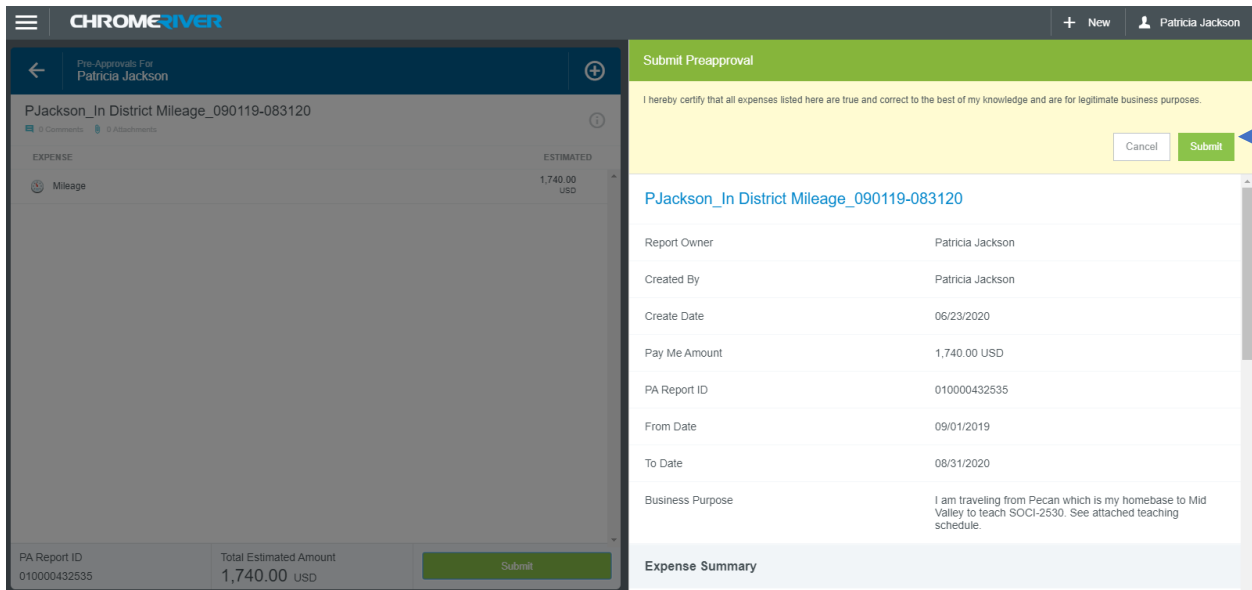
Submit

Submitting a Pre-Approval – No Dean Approval needed

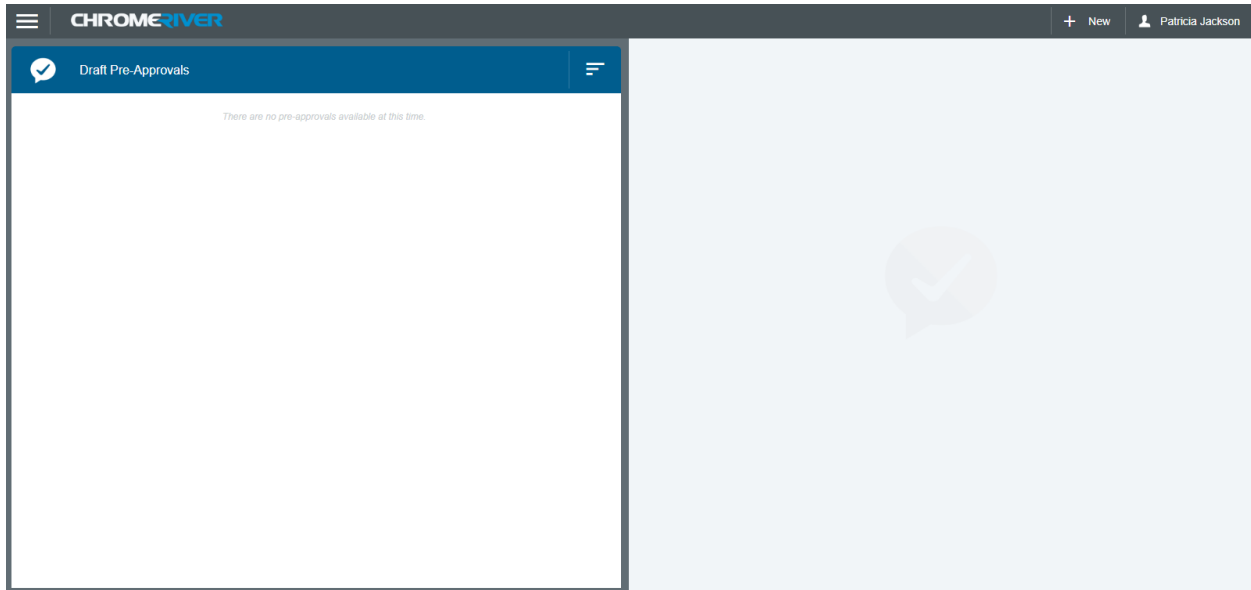
The system will bring you back to the expenses menu once you save.



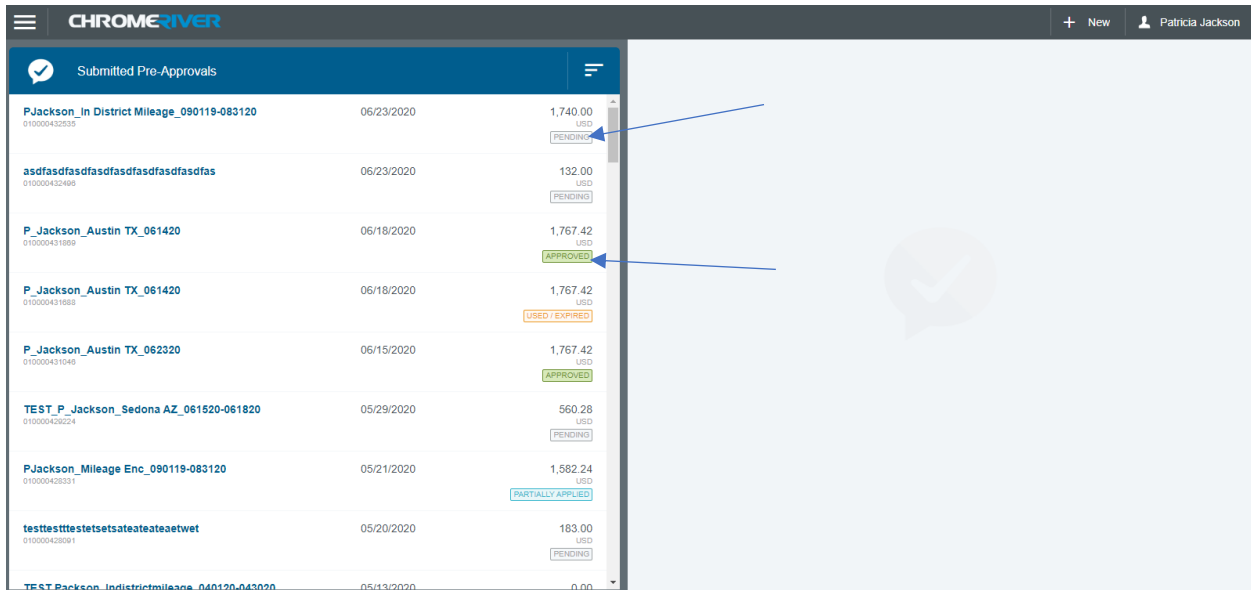
Click the certification submit button as well.



The system will clear the draft dashboard and you can now see the pre-approval under the submitted pre-approvals.



You can see under the submitted that the status is still pending which means it has not been approved. You may recall your item for changes but not after it is approved.



Once an item is fully approved it will say Approved on the dashboard.

If Dean approval is not required this is what you would see. Click Submit.

The screenshot shows the Chrome River interface for a pre-approval report. The left sidebar displays the report details for Patricia Jackson, including a list of expenses and their estimated amounts. The total estimated amount is 1,767.42 USD. A green 'Submit' button is located at the bottom right of the report details, with a blue arrow pointing to it. The right sidebar shows the 'Comments' and 'Attachments' sections, with a 'Post' button and an 'Upload Attachments' button.

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD
Conference / Seminar	500.00 USD
Professional Membership Dues	125.00 USD

PA Report ID: 010000431869
Total Estimated Amount: 1,767.42 USD
Submit

The system will bring you to the certification page:

The screenshot shows the Chrome River interface for the certification page. The left sidebar displays the report details for Patricia Jackson, including a list of expenses and their estimated amounts. The total estimated amount is 1,767.42 USD. A green 'Submit' button is located at the bottom right of the report details, with a blue arrow pointing to it. The right sidebar shows the 'Submit Preapproval' section with a yellow background and a 'Submit' button. Below this is the 'Expense Summary' section with a table of report details.

I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.

Cancel Submit

P_Jackson_Austin TX_061420

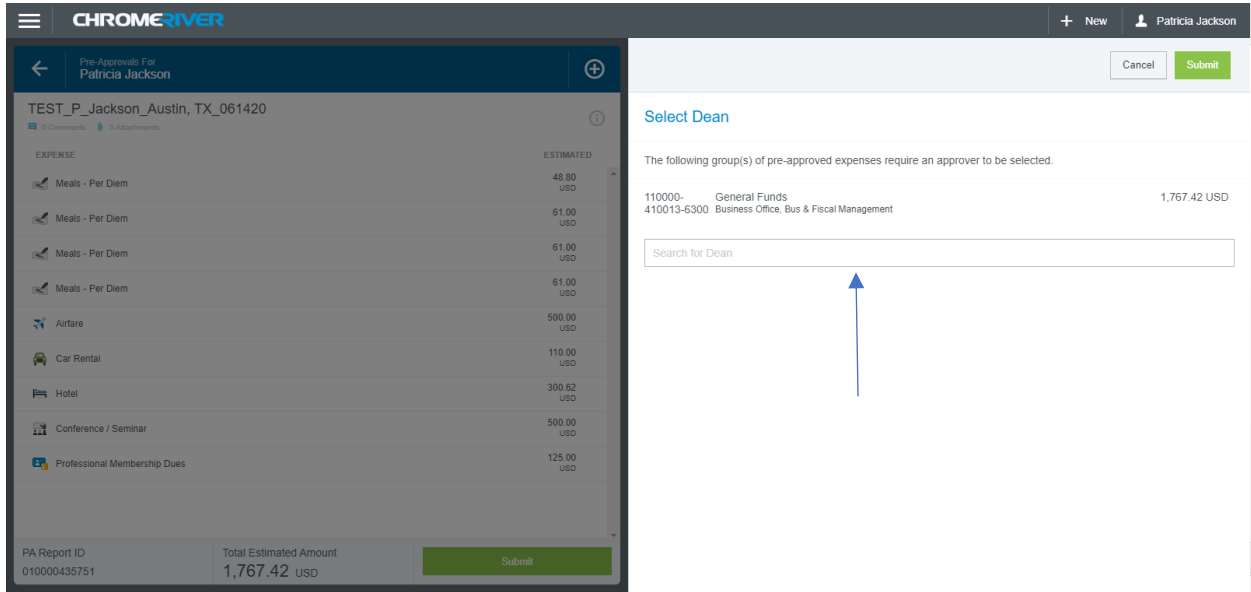
Report Owner	Patricia Jackson
Created By	Patricia Jackson
Create Date	06/18/2020
Pay Me Amount	1,767.42 USD
PA Report ID	010000431869
From Date	06/14/2020
To Date	06/17/2020
Business Purpose	1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.

Expense Summary

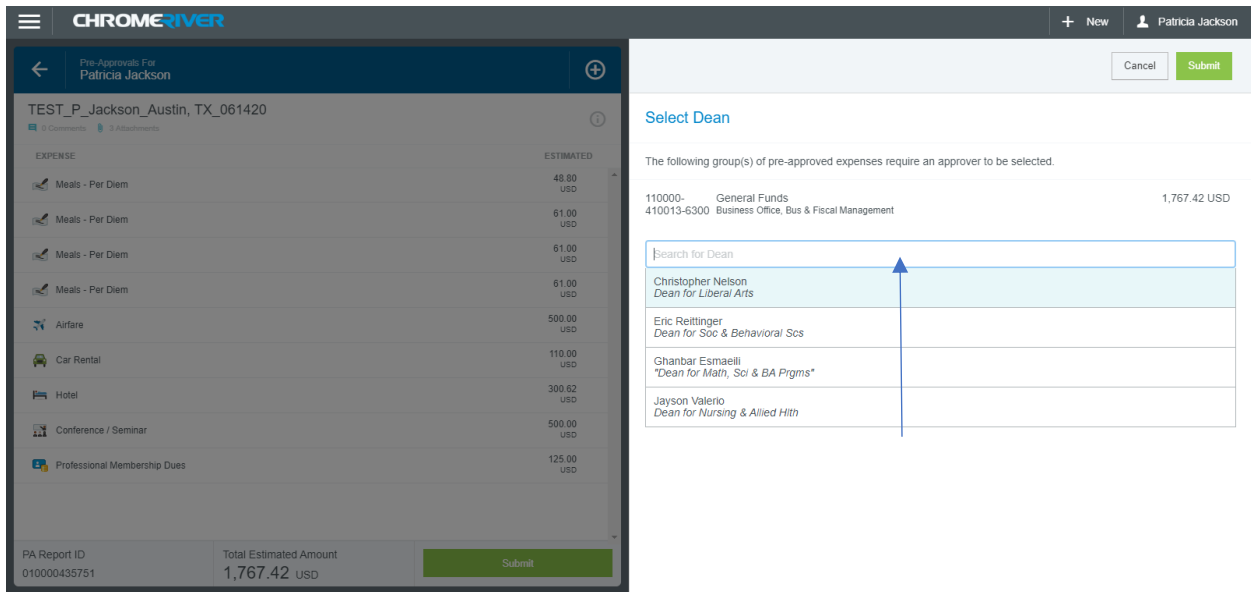
Certify that all the information is true and correct by clicking the submit button. The system will let you know that the report has been submitted. My pre-approval is no longer on the draft section of my dashboard so I am going to click the hamburger menu at the top left-hand side of my screen.

Submitting a Pre-Approval – Yes Dean Approval needed

If you selected Yes for the Dean to approve question on the Report Header, the system will prompt you for the Dean when you click Submit. Click the drop box to display the Deans available.



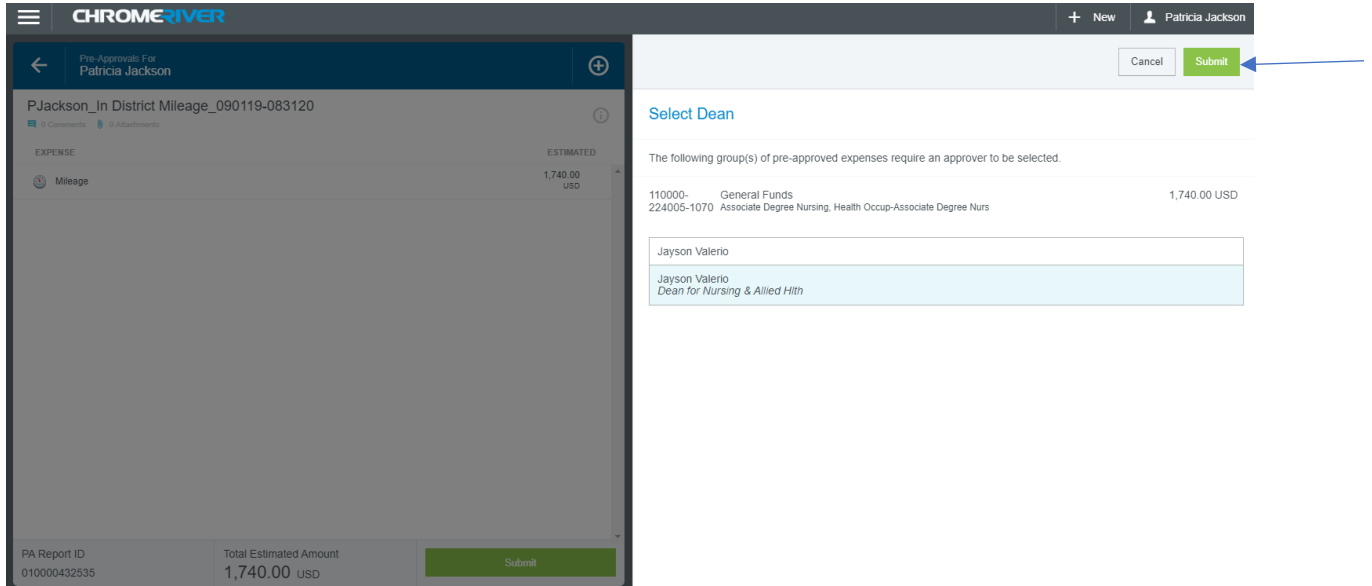
Choose the correct Dean by clicking on the name.



*****Note: This drop-down list will list all Dean's. It is your responsibility to select the correct one. If you do not it will go to the incorrect Dean.**

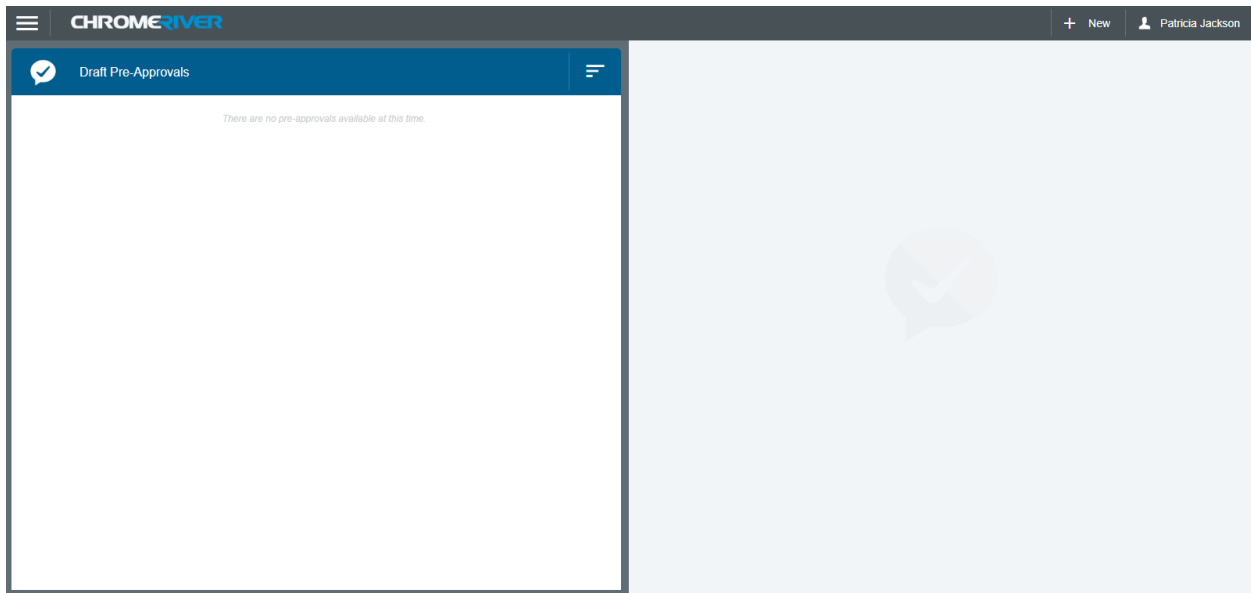
Click the appropriate Dean.

In my example the Dean is Dean Jayson Valerio.



Click submit.

The system will clear your draft dashboard and you can now see your pre-approval under your submitted pre-approvals.



You can see under the submitted pre-approvals that the status says pending which means it has not been approved. You may recall your item for changes but only if the status is pending.

This system will assign a report number starting with PA. You can find it under the report name.

Report Name	Date	Amount (USD)	Status
PJackson_In District Mileage_090119-083120	06/23/2020	1,740.00	PENDING
asdfasdfsdfasdfsdfasdfsdfas	06/23/2020	132.00	PENDING
P_Jackson_Austin TX_061420	06/18/2020	1,767.42	APPROVED
P_Jackson_Austin TX_061420	06/18/2020	1,767.42	USED / EXPIRED
P_Jackson_Austin TX_062320	06/15/2020	1,767.42	APPROVED
TEST_P_Jackson_Sedona AZ_061520-061820	05/29/2020	560.28	PENDING
PJackson_Mileage Enc_090119-083120	05/21/2020	1,582.24	PARTIALLY APPLIED
teststttttestsetsateateatetwet	05/20/2020	183.00	PENDING
TEST P Jackson_Indistrictmileage_040120-043020	05/13/2020	0.00	USED / EXPIRED

Once an item is fully approved it will say Approved on the dashboard.

The system will bring you to this screen. It will show you all the pre-approvals you have entered.

Report Name	Date	Amount (USD)	Status
P_Jackson_Austin TX_061420	06/18/2020	1,767.42	PENDING
P_Jackson_Austin TX_061420	06/18/2020	1,767.42	USED / EXPIRED
P_Jackson_Austin TX_062320	06/15/2020	1,767.42	APPROVED
TEST_P_Jackson_Sedona AZ_061520-061820	05/29/2020	560.28	PENDING
PJackson_Mileage Enc_090119-083120	05/21/2020	1,582.24	PARTIALLY APPLIED
teststttttestsetsateateatetwet	05/20/2020	183.00	PENDING
TEST P Jackson_Indistrictmileage_040120-043020	05/13/2020	0.00	USED / EXPIRED
TEST P Jackson_nonstudentmileage_050120-051020	05/13/2020	0.00	USED / EXPIRED
Testing cash advance on mileage	03/05/2020	183.24	USED / EXPIRED

Opening a Pre-Approval/PDF

At any time during the process you can always click on the hamburger menu and go to the dashboard which will bring you here. You can then click any of the blocks in the pre-approval section.

CHROME RIVER | + New | Patricia Jackson

APPROVALS | Approvals Needed: 1 Expense Reports | 0 Pre-Approvals

EXPENSES | 0 Draft | 0 Returned | 3 Submitted Last 90 Days

PRE-APPROVAL | 1 Draft | 0 Returned | 6 Submitted Last 90 days

SOUTH TEXAS COLLEGE

C O N T A C T

For Pre-Approvals and Expense report processing assistance, please contact:

- Main email for all supporting documents: traveloffice@southtexascollege.edu
- Tonya Ecker, Travel Assistant: 956-872-4618 | tecker@southtexascollege.edu
- Melissa Lara, Travel Assistant: 956-872-4656 | mmendoza_0438@southtexascollege.edu
- Maricarmen Ramirez, Accounts Payable / Travel Supervisor: 956-872-4602 | mramirez@southtexascollege.edu

N O T I C E S

All travel cancelled through August 31, 2020

Employee Travel Guide: <https://jagnet.southtexascollege.edu/web/jagnet/employee>

REMINDER: Per Diem Rules

Click on the pre-approval you want to view.

CHROME RIVER | + New | Patricia Jackson

Submitted Pre-Approvals

P_Jackson_Austin_TX_061420 010000431895	06/18/2020	1,767.42 USD	PENDING
P_Jackson_Austin_TX_061420 010000431588	06/18/2020	1,767.42 USD	USED / EXPIRED
P_Jackson_Austin_TX_062320 010000431048	06/15/2020	1,767.42 USD	APPROVED
TEST_P_Jackson_Sedona_AZ_061520-061820 010000428254	05/29/2020	560.28 USD	PENDING
PJackson_Mileage_Enc_090119-083120 010000428331	05/21/2020	1,582.24 USD	PARTIALLY APPLIED
teststtttsetsateateateetwet 010000428091	05/20/2020	183.00 USD	PENDING
TEST_Packson_Indistrictmileage_040120-043020 010000427378	05/13/2020	0.00 USD	USED / EXPIRED
TEST_PJackson_nonstudentmileage_050120-051020 010000427377	05/13/2020	0.00 USD	USED / EXPIRED
Testing cash advance on mileage	03/05/2020	183.24	

Click the open button

The screenshot shows the Chrome River interface. On the left, there is a list of submitted pre-approvals. On the right, the details for the selected pre-approval 'P_Jackson_Austin TX_061420' are displayed. A blue arrow points to the 'Open' button in the top right corner of the list view.

Report Name	Date	Amount	Status
P_Jackson_Austin TX_061420	06/18/2020	1,767.42 USD	APPROVED
P_Jackson_Austin TX_061420	06/18/2020	1,767.42 USD	USED / EXPIRED
P_Jackson_Austin TX_062320	06/15/2020	1,767.42 USD	APPROVED
TEST_P_Jackson_Sedona AZ_061520-061820	05/29/2020	560.28 USD	PENDING
P_Jackson_Mileage Enc_090119-083120	05/21/2020	1,582.24 USD	PARTIALLY APPLIED
teststtsetstetsateateateawet	05/20/2020	183.00 USD	PENDING
TEST P_Jackson_Indistrictmileage_040120-043020	05/13/2020	0.00 USD	USED / EXPIRED
TEST P_Jackson_nonstudentmileage_050120-051020	05/13/2020	0.00 USD	USED / EXPIRED
Testing cash advance on mileage	03/05/2020	183.24	

Details for P_Jackson_Austin TX_061420:

- Report Owner: Patricia Jackson
- Created By: Patricia Jackson
- Create Date: 06/18/2020
- Pay Me Amount: 1,767.42 USD
- PA Report ID: 010000431869
- From Date: 06/14/2020
- To Date: 06/17/2020
- Business Purpose: 1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.
- Prior Approver: Giovanni Colin (06/18/2020)

The system will open the pre-approval on the right side of your screen and your expenses on the left-hand side.

The screenshot shows the Chrome River interface with the detailed view of the pre-approval 'P_Jackson_Austin TX_061420' on the left and the list of pre-approvals on the right.

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD
Conference / Seminar	500.00 USD
Professional Membership Dues	125.00 USD

Summary:

- PA Report ID: 010000431869
- Total Estimated Amount: 1,767.42 USD

Details for Pre-Approvals For Patricia Jackson:

- Report Name: P_Jackson_Austin TX_061420
- Start Date: 06/14/2020
- End Date: 06/17/2020
- Number of Days: 4
- Pay Me In: USD - US Dollars
- Business Purpose: 1. What is the purpose of the travel? To learn of any changes in the Title IV program s. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.
- Travel Justification:
- Cash Advance Amount: 185.44
- Report Type: Employee Travel

Opening a PDF

At any time during your process you can always click on the hamburger menu and go to the dashboard which will bring you here. You can then click any of the blocks in the pre-approval section.

CHROME RIVER + New Patricia Jackson

APPROVALS Approvals Needed: 1 Expense Reports, 0 Pre-Approvals

EXPENSES 0 Draft, 0 Returned, 3 Submitted Last 90 Days

PRE-APPROVAL 1 Draft, 0 Returned, 6 Submitted Last 90 days

SOUTH TEXAS COLLEGE

C O N T A C T

For Pre-Approvals and Expense report processing assistance, please contact:

- Main email for all supporting documents: traveloffice@southtexascollege.edu
- Tonya Ecker, Travel Assistant: 956-872-4618, tecker@southtexascollege.edu
- Melissa Lara, Travel Assistant: 956-872-4656, mmendoza_0438@southtexascollege.edu
- Maricarmen Ramirez, Accounts Payable / Travel Supervisor: 956-872-4602, mramirez@southtexascollege.edu

N O T I C E S

All travel cancelled through August 31, 2020

Employee Travel Guide: <https://jagnet.southtexascollege.edu/web/jagnet/employee>

REMINDER: Per Diem Rules

You then click on the pre-approval you want to print the PDF for.

CHROME RIVER + New Patricia Jackson

Submitted Pre-Approvals

User	Date	Amount	Status
P_Jackson_Austin TX_061420	06/18/2020	1,767.42 USD	PENDING
P_Jackson_Austin TX_061420	06/18/2020	1,767.42 USD	USED / EXPIRED
P_Jackson_Austin TX_062320	06/15/2020	1,767.42 USD	APPROVED
TEST_P_Jackson_Sedona AZ_061520-061820	05/29/2020	560.28 USD	PENDING
PJackson_Mileage Enc_090119-083120	05/21/2020	1,582.24 USD	PARTIALLY APPLIED
teststttestetsateateateatwet	05/20/2020	183.00 USD	PENDING
TEST Packson_Indistrictmileage_040120-043020	05/13/2020	0.00 USD	USED / EXPIRED
TEST PJackson_nonstudentmileage_050120-051020	05/13/2020	0.00 USD	USED / EXPIRED
Testing cash advance on mileage	03/05/2020	183.24	

Click the PDF button

The screenshot shows the Chrome River interface. On the left, a table lists submitted pre-approvals. On the right, a detailed view of a report titled "P_Jackson_Austin TX_061420" is shown. A blue arrow points to the "PDF" button in the top navigation bar.

Report ID	Date	Amount	Status
P_Jackson_Austin TX_061420	06/18/2020	1,767.42 USD	APPROVED
P_Jackson_Austin TX_061420	06/18/2020	1,767.42 USD	USED / EXPIRED
P_Jackson_Austin TX_062320	06/15/2020	1,767.42 USD	APPROVED
TEST_P_Jackson_Sedona AZ_061520-061820	05/29/2020	560.28 USD	PENDING
P_Jackson_Mileage Enc_090119-083120	05/21/2020	1,582.24 USD	PARTIALLY APPLIED
testtestttesttsetsateateaeetwet	05/20/2020	183.00 USD	PENDING
TEST_P_Jackson_Indistrictmileage_040120-043020	05/13/2020	0.00 USD	USED / EXPIRED
TEST_P_Jackson_nonstudentmileage_050120-051020	05/13/2020	0.00 USD	USED / EXPIRED
Testing cash advance on mileage	03/05/2020	183.24	

P_Jackson_Austin TX_061420

Report Owner: Patricia Jackson
Created By: Patricia Jackson
Create Date: 06/18/2020
Pay Me Amount: 1,767.42 USD
PA Report ID: 010000431869
From Date: 06/14/2020
To Date: 06/17/2020
Business Purpose: 1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.

Prior Approvers

APPROVER	DATE
Giovanni Colin	06/18/2020

This screenshot is similar to the one above, but with a dropdown menu open over the "PDF" button. The menu offers two options: "Full Report" and "Full Report with Receipts". A blue arrow points to the "Full Report with Receipts" option.

P_Jackson_Austin TX_061420

Report Owner: Patricia Jackson
Created By: Patricia Jackson
Create Date: 06/18/2020
Pay Me Amount: 1,767.42 USD
PA Report ID: 010000431869
From Date: 06/14/2020
To Date: 06/17/2020
Business Purpose: 1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.

Prior Approvers

APPROVER	DATE
Giovanni Colin	06/18/2020

You get two choices: Full Report or Full Report with Receipts. Choose the one you would like to print.

Full report will only give you the report without the attachments. Full report with receipts will include all attachments.

Tracking a Pre-Approval

If you click tracking the system will tell you where the pre-approval is in the approval process.

The screenshot shows the Chrome River interface. On the left, a table lists submitted pre-approvals. The first item, 'P_Jackson_Austin TX_061420', is highlighted. On the right, a detailed view for this item is shown. The 'Tracking' button is highlighted with a blue arrow. The detailed view includes fields for Report Owner, Created By, Create Date, Pay Me Amount, PA Report ID, From Date, To Date, and Business Purpose. A 'Prior Approvers' section shows Giovanni Colin as the approver on 06/18/2020.

Item ID	Date	Amount	Status
P_Jackson_Austin TX_061420	06/18/2020	1,767.42 USD	APPROVED
P_Jackson_Austin TX_061420	06/18/2020	1,767.42 USD	USED / EXPIRED
P_Jackson_Austin TX_062320	06/15/2020	1,767.42 USD	APPROVED
TEST_P_Jackson_Sedona AZ_061520-061820	05/29/2020	560.28 USD	PENDING
PJackson_Mileage Enc_090119-083120	05/21/2020	1,582.24 USD	PARTIALLY APPLIED
testtettsttetsatsateateatwet	05/20/2020	183.00 USD	PENDING
TEST Packson_Indistrictmileage_040120-043020	05/13/2020	0.00 USD	USED / EXPIRED
TEST PJackson_nonstudentmileage_050120-051020	05/13/2020	0.00 USD	USED / EXPIRED
Testing cash advance on mileage	03/05/2020	183.74	

In this example the item is fully approved.

The screenshot shows the Chrome River interface with the tracking details for 'P_Jackson_Austin TX_061420'. The status is 'Approved'. The estimated amount is 1,767.42 USD. The routing steps section shows a flow of three steps, all marked with green checkmarks. The first step is detailed below:

Field	Value
Status	Approved
Estimated Amount	1,767.42 USD
Routing Steps	Three steps, all completed (indicated by green checkmarks)
Step Number	1
Approver	Maricarmen Ramirez
Assigned Date	06/18/2020 02:35 PM
Step Status	Re-Assigned
Re-Assigned By	Giovanni Colin
Re-Assigned Date	06/18/2020 03:23 PM
Approver	Giovanni Colin

You may open the tracking function as many times as you want throughout the approval process. Just make sure to open the pre-approval and then click tracking.

Recalling a Pre-Approval

If you click Recall it will tell you that the report will be moved to the draft list. If I select Yes it will move my pre-approval to the draft side and I can amend as I wish and resubmit.

The screenshot displays the CHROME RIVER system interface. On the left, a table lists 'Submitted Pre-Approvals' with columns for report name, date, and amount. A modal dialog box titled 'Recall This Report?' is overlaid on the table, asking 'Recall This Report?' and 'This report will be moved to the draft list.' with 'No' and 'Yes' buttons. On the right, a detailed view of a report titled 'P_Jackson_Austin TX_062320' is shown, including fields for Report Owner, Created By, Create Date, To Date, Business Purpose, and Expense Summary. A blue arrow points to the 'Recall' button in the top right corner of the report view.

Report Name	Date	Amount (USD)	Status
P_Jackson_Austin TX_062320	06/15/2020	1,767.42	PENDING
TEST_P_Jackson_Sedona AZ_061520-061820	05/29/2020	560.28	PENDING
PJackson_Mileage Enc_090119-083120	05/21/2020	1,582.24	PENDING
testtesttesttesttesttesttestwet	05/20/2020		
TEST Packson_Indistrictmileage_040120-043020	05/13/2020		USED / EXPIRED
TEST PJackson_nonstudentmileage_050120-051020	05/13/2020	0.00	USED / EXPIRED
Testing cash advance on mileage	03/05/2020	183.24	APPROVED
Test_nonstudentclubtravelinstate_207-208	02/07/2020	959.80	PENDING
Test Non-Student Club Travel In State w/Dean	02/06/2020	0.00	

*****You can recall a pre-approval as long as it hasn't been fully approved.**

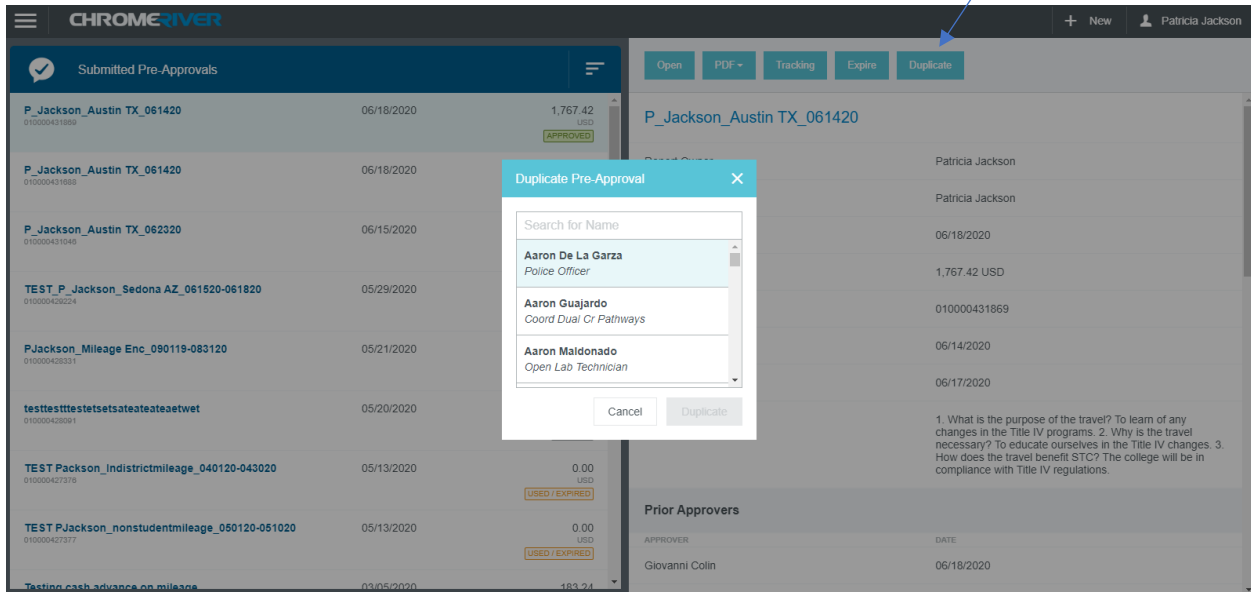
NOTE:

If the "recall" button is used by the department, all items including the report name can be updated.

Should an item be "returned" to the department, the report name cannot be updated. In order to update the report name, the item would have to be deleted and the delegate or traveler would have to start the report from the beginning.

Duplicating a Pre-Approval

If you press Duplicate, a pop-up menu will appear and you will select the traveler you want to duplicate the pre-approval for from the drop-down. You can also do a name search. Click on the name.



The system will let you know it was duplicated successfully. This option can be helpful when you have been delegated access to several employees who are traveling on the same trip. Keep in mind the new pre-approval duplicated will have to be reviewed for any changes that do not apply to the employee who received the duplicate copy.

Returned Pre-Approval

When an approver has returned a pre-approval request to the requester during the approval process, it will appear in the Returned Pre-Approvals list. To access it tap on **RETURNED** in the Pre-Approval section of the Dashboard.



You may click on the returned block of the pre-approval section and highlight the pre-approval that was returned and correct the items you need by opening the pre-approval and clicking the Edit button. Save and resubmit.

NOTE:

If the “recall” button is used by the department, all items including the report name, can be updated/edited.

Should an item be “returned” to the department, the report name cannot be updated. In order to update the report name, the item would have to be deleted and the delegate or traveler would have to start the report from the beginning.

Expire Pre-Approval

The expire button is available to clear encumbrances for trips that are not taken, or for encumbrances that were not fully processed for payment (discount available for registration, lodging pricing less than originally quoted, etc).

Procedures are being developed and permission should be requested from Financial Manager prior to using this feature, however, for now – *please contact the Travel Office prior to expiring travel funds.*

The screenshot shows a software interface with a dark header bar containing a '+ New' button and a 'User Name' dropdown. Below the header is a row of action buttons: 'Open', 'PDF', 'Tracking', 'Expire', and 'Recall'. The 'Expire' button is highlighted with a red border. Below the buttons is a report card for 'Training Trip to San Jose' with the following details:

Report Owner	Pam Beesly
Created by	Pam Beesly
Create date	05/15/2015
AP Report ID	DEV006833769
Business Purpose	Business Trip to San Jose in January with Branch Manager Michael Scott.

Are You Sure? ✕

Are you sure you want to expire this Pre-Approval? You will no longer be able to link it to expense reports.

Cancel Expire

Pre-Approval Email Request

As a pre-approval moves in the approval process to Supervisors, Financial Managers, Deans, Vice President, and President, each will receive a notification email to notify them of their pending approval. If it goes more than forty-eight hours without being approved the system will send a reminder email and continue at the same forty-eight hour interval until approved.

Pre-Approval ID: 0100-0043-1869

ACTION REQUIRED		Chrome River
Pre-Approval Request For	Patricia Jackson [Accountant, pajackson@southtexascollege.edu]	
Report Name	P_Jackson_Austin TX_061420	
Pre-Approval ID	0100-0043-1869	
Submit Date	06/18/2020	
Expense Dates	06/14/2020 - 06/17/2020	
Total Expenses Approved	1,767.42 USD	
Start Date	Jun 14, 2020	
Business Purpose	1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.	
Location	In State	
TravelerID	A00136468	
End Date	Jun 17, 2020	
Report Type	Employee Travel	
Cash Advance Amount	185	
Business Purpose		
1. What is the purpose of the travel? To learn of any changes in the Title IV programs ? Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.		
Expense Details		
Airfare		500.00 USD
Description	A00000659 Shands Brook Travel	
Is this going to be paid by STC?	Yes	
Car Rental		110.00 USD
Description	A00464964 Enterprise Car Rental	
Is this going to be paid by STC?	Yes	
Please provide REQ/PO number for car rental	R0033181	
Conference / Seminar		500.00 USD
Description	A00461448 Educause Inc Early Bird registration is due on 05/25/2020 if not registration fee will go up. susan.watkins@educause.org 512-387-2089	
Please provide any contact information to allow us to process the payment (email, phone, etc.)		
Please provide deadline for registration	May 20, 2020	
Is employee already registered?	Yes	
Is this going to be paid by STC?	Yes	
Please provide any additional info needed for registration	Please make payment to Educause Inc. They do not take credit cards	
Hotel		300.62 USD
Description	A00370286 Embassy Suites Austin Arboretum Room rate is \$250.00, hotel taxes are 8.50% or \$21.25 for city taxes, 6% or \$15.00 for state taxes, 1.75% or \$4.37 for county taxes, 10% or \$25.00 for resort fees. Trip is in state so state taxes do not apply. Fees that apply are \$250.00+\$21.25+\$4.37+\$25.00=\$300.62. Hotel does not provide breakfast	
Is this going to be paid by STC?	Yes	
Vendor	A00370286 Embassy Suites Austin Arboretum	
Vendor City	Austin	
PerDiem		48.80 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	
PerDiem		61.00 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	
PerDiem		61.00 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	

Continued email on next page.

paid by STC? Please provide any additional info needed for registration		Pease make payment to Educause Inc. They do not take credit cards
Hotel		300.62 USD
Description	A00370286 Embassy Suites Austin Arboretum Room rate is \$250.00, hotel taxes are 8.50% or \$21.25 for city taxes, 6% or \$15.00 for state taxes, 1.75% or \$4.37 for county taxes, 10% or \$25.00 for resort fees. Trip is in state so state taxes do not apply. Fees that apply are \$250.00+\$21.25+\$4.37+\$25.00=\$300.62. Hotel does not provide breakfast	
Is this going to be paid by STC?	Yes	
Vendor	A00370286 Embassy Suites Austin Arboretum	
Vendor City	Austin	
PerDiem		48.80 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	
PerDiem		61.00 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	
PerDiem		61.00 USD
PerDiem		61.00 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	
PerDiem		61.00 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	
Professional Membership Dues		125.00 USD
Description	A00001234 O'Reilly's Auto	
Is this going to be paid by STC?	Yes	
<div style="display: inline-block; background-color: green; color: white; padding: 5px 15px; margin: 5px;">ACCEPT</div> <div style="display: inline-block; background-color: red; color: white; padding: 5px 15px; margin: 5px 15px; margin-left: 20px;">RETURN</div>		

Pre-Approval ID: 0100-0043-1869

To take action on these expenses, take either of the following steps:

- Click on the **ACCEPT** or **RETURN** button as appropriate and add any comments to the new email that opens.
- OR **FORWARD** this email to approve@preapproval.ca1.chromeriver.com or return@preapproval.ca1.chromeriver.com with any comments at the top of the forwarded message.

To view this expense report or access the Chrome River application, [click here](#).

The pre-approval can be approved directly from your email without logging into ChromeRiver by clicking on the Accept or Return button.

Pre-Approval Email Notification

The traveler will receive this email once the pre-approval is fully approved. The delegate will never receive an email so they will have to request the approval email from the traveler or track it in the system to see the status.

NO ACTION REQUIRED		Chrome River
The following Pre-Approval Request has been approved.		
Pre-Approval Request For	Patricia Jackson	
Report Name	P_Jackson_Austin TX_061420	
Pre-Approval ID	0100-0043-1869	
Submit Date	06/18/2020	
Expense Dates	06/14/2020 - 06/17/2020	
Total Expenses	1,767.42 USD	

Approving a Pre-Approval

To approve a pre-approval via email, make sure to check all the expenses then click the Accept button at the bottom. To return for correction you click the Return button at the bottom.

Pre-Approval ID: 0100-0043-1869

ACTION REQUIRED		Chrome River
Pre-Approval Request For	Patricia Jackson [Accountant, pajackson@southtexascollege.edu]	
Report Name	P_Jackson_Austin TX_061420	
Pre-Approval ID	0100-0043-1869	
Submit Date	06/18/2020	
Expense Dates	06/14/2020 - 06/17/2020	
Total Expenses Approved	1,767.42 USD	
Start Date	Jun 14, 2020	
Business Purpose	1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.	
Location	In State	
TravelerID	A00136468	
End Date	Jun 17, 2020	
Report Type	Employee Travel	
Cash Advance Amount	185	
Business Purpose		
1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.		
Reason for Assignment		
Reports To Supervisor		
Account Summary		
		Amount (USD)
110000-	100.00%	General Funds
410013-6300		Business Office, Bus & Fiscal Management
		1,767.42
Expense Details		
Airfare		500.00 USD
Description	A00000659 Shands Brook Travel	
Is this going to be paid by STC?	Yes	
Car Rental		110.00 USD
Description	A00464964 Enterprise Car Rental	
Is this going to be paid by STC?	Yes	
Please provide REQ/PO number for car rental	R0033181	
Conference / Seminar		500.00 USD
Description	A00461448 Educause Inc Early Bird registration is due on 05/25/2020 if not registration fee will go up.	
Please provide any contact information to allow us to process the payment (email, phone, etc.)	susan.watkins@educause.org 512-387-2089	
Please provide deadline for registration	May 20, 2020	
Is employees already registered?	Yes	
Is this going to be paid by STC?	Yes	
Please provide any additional info needed for registration	Pease make payment to Educause Inc. They do not take credit cards	
Hotel		300.62 USD
Description	A00370286 Embassy Suites Austin Arboretum Room rate is \$250.00, hotel taxes are 8.50% or \$21.25 for city taxes, 6% or \$15.00 for state taxes, 1.75% or \$4.37 for county taxes, 10% or \$25.00 for resort fees. Trip is in state so state taxes do not apply. Fees that apply are \$250.00+\$21.25+\$4.37+\$25.00=\$300.62. Hotel does not provide breakfast	
Is this going to be paid by STC?	Yes	
Vendor	A00370286 Embassy Suites Austin Arboretum	
Vendor City	Austin	
PerDiem		48.80 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	
PerDiem		61.00 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	
PerDiem		61.00 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	

Continued from previous page

paid by STC? Please provide any additional info needed for registration		Pease make payment to Educause Inc. They do not take credit cards
Hotel		300.62 USD
Description	A00370286 Embassy Suites Austin Arboretum Room rate is \$250.00, hotel taxes are 8.50% or \$21.25 for city taxes, 6% or \$15.00 for state taxes, 1.75% or \$4.37 for county taxes, 10% or \$25.00 for resort fees. Trip is in state so state taxes do not apply. Fees that apply are \$250.00+\$21.25+\$4.37+\$25.00=\$300.62. Hotel does not provide breakfast	
Is this going to be paid by STC?	Yes	
Vendor	A00370286 Embassy Suites Austin Arboretum	
Vendor City	Austin	
PerDiem		48.80 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	
PerDiem		61.00 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	
PerDiem		61.00 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	
PerDiem		61.00 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	
Professional Membership Dues		125.00 USD
Description	A00001234 O'Reilly's Auto	
Is this going to be paid by STC?	Yes	

ACCEPT
RETURN

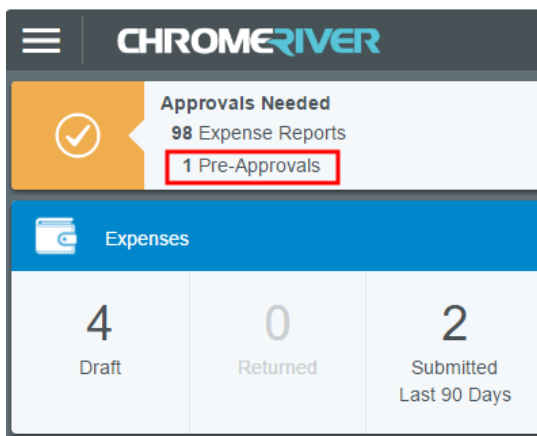
Pre-Approval ID: 0100-0043-1869

To take action on these expenses, take either of the following steps:

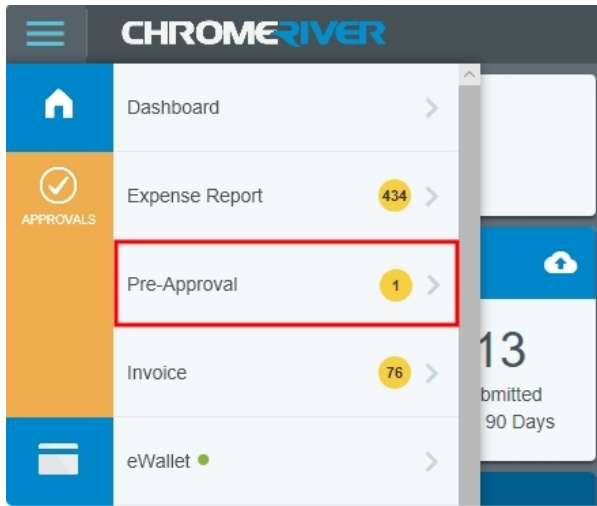
- Click on the **ACCEPT** or **RETURN** button as appropriate and add any comments to the new email that opens,
- OR **FORWARD** this email to approve@preapproval.ca1.chromeriver.com or return@preapproval.ca1.chromeriver.com with any comments at the top of the forwarded message.

To view this expense report or access the Chrome River application, [click here](#).

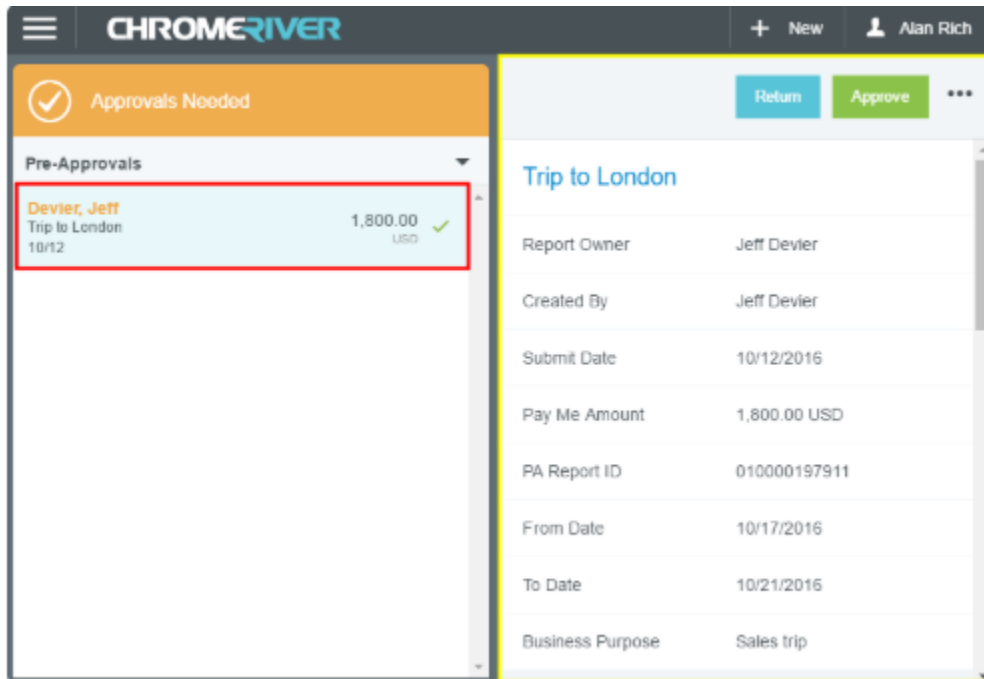
You can also approve via the Chrome River app by going to the dashboard. In the **Approvals Needed** notification bar at the top of the Dashboard, tap on **PRE-APPROVALS**.



You may also access your approvals by tapping the **MENU** button and selecting Pre-Approval. The yellow circle shows the number of pre-approvals waiting for you.



The Approvals Needed list displays all the pre-approvals awaiting your approval under the **Pre-Approval** tab. Tap on the approval you wish to view and a preview will slide in from the right. Then click approve after you have reviewed all items.



Approving a Pre-Approval

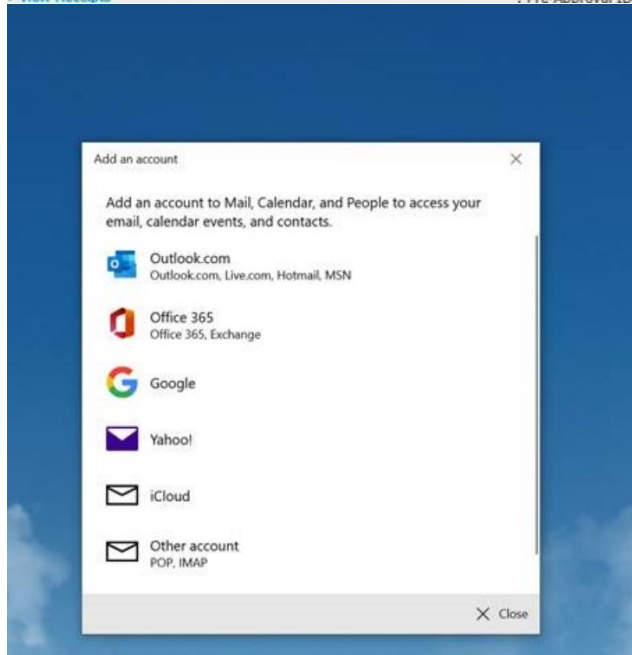
Outlook Email issues

As indicated during the Chrome River Training Sessions, an approval request email will be submitted to all Supervisors and Financial Managers, or they may log into JagNet and access Chrome River through the icons, under employee, as soon as you log in.

If you click on the email to review and accept or return the Chrome River document, some supervisors are seeing:

Travel Justification	Vinyl signage project		
TravelerID	A00032411		
End Date	Aug 13, 2020		
Report Type	Employee Travel		
Business Purpose			
a) What is the purpose of the travel? To create and install vinyl signage for all campus libraries. b) Why is the travel necessary? To have professional and consistent signage in all locations. c) How does the travel benefit STC? To provided our students, faculty, staff, and community patrons with clear informational signs.			
Reason for Assignment			
Route to Financial Manager			
Account Summary			Amount (USD)
110000-530005-4100	100.00%	General Funds	Library Automation, Library 86.33
Expense Details			86.33 USD
Mileage	Description From: 3201 Pecan Boulevard, McAllen, TX, USA To: 142 FM 3167, Rio Grande City, TX 78582, USA To: 3201 Pecan Boulevard, McAllen, TX, USA To: 1901 S McColl Rd, McAllen, TX 78503, USA To: 3201 Pecan Boulevard, McAllen, TX, USA To: 400 N Border Ave, Weslaco, TX 78596, USA To: 3201 Pecan Boulevard, McAllen, TX, USA To: 1901 S McColl Rd, McAllen, TX 78503, USA To: 3201 Pecan Boulevard, McAllen, TX, USA		
ACCEPT		RETURN	

> View Receipts : Pre-Approval ID 0100-0045-3000



After discussion with Chrome River support, this is related to the device settings and not the email information on Chrome River. We are checking with I.T. to see if Outlook can be set up as the default email application, however, in the meantime:

If you are using an STC computer follow the steps below to set up Outlook as default in order to correct the issue.

- 1.) Click on Windows menu
- 2.) Type "Default Apps" and hit enter
- 3.) Under Email, click on the default icon and select Outlook

