



Approving and Reassigning a Pre-Approval Report

All IU-sponsored travel requires Pre-Approval. This Pre-Approval is collected in Chrome River via the Chrome River Pre-Approval (PA) report. The PA report requirement supports IU’s responsibility to act in the best interest of our colleagues and ensure they are working in the safest possible conditions. It also allows Fiscal Officers and other fiscal reviewers to be fully aware of projected costs for upcoming travel plans.

Pre-Approval is required when submitting the following Chrome River expense report types:

- Employee Travel
- Student Travel
- Non-Employee/Non-Student Travel
- Recruiting Travel
- Student Group Travel

Information on [notifications in Chrome River can be found here.](#)

Until further notice, all IU travel must be booked through a [designated travel agency \(DTA\)](#). Check for compliance by reviewing the comments section of each PA.

For information on how travelers request and substantiate exception to the DTA requirement, [review the steps outlined in this Travel Bulletin article.](#)

This document walks through how to review, approve, and return a PA report. It also demonstrates how to reassign the report to an assignee, such as an Executive Approver, for additional review and approval.

Contents

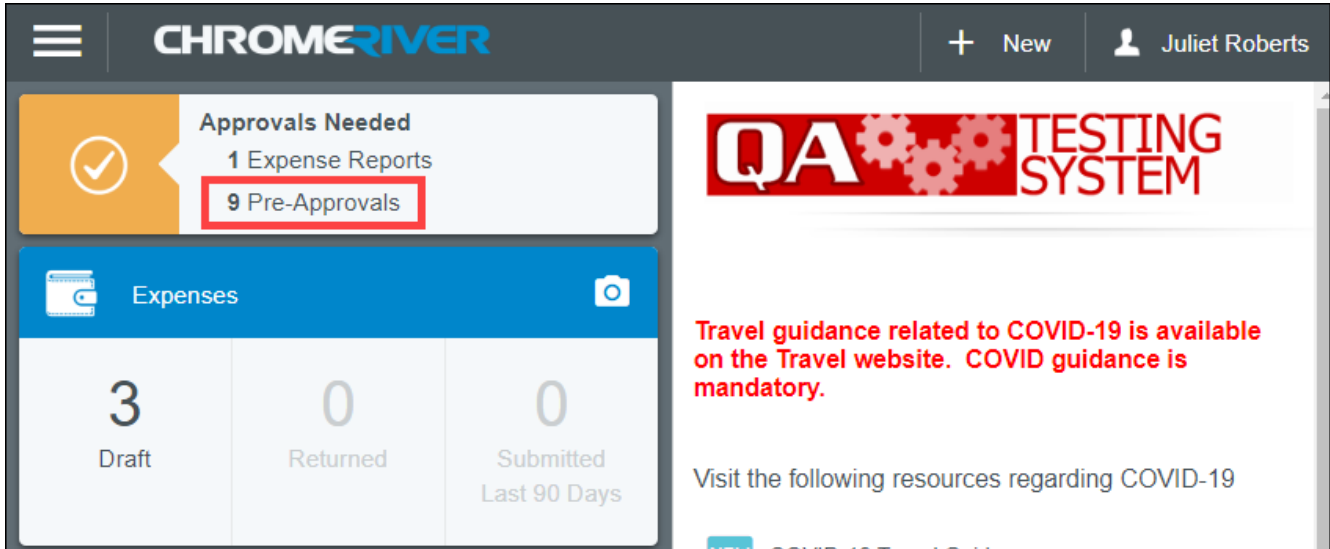
Review and Approve a Report	2
Return a Report.....	6
Reassign a Report.....	7



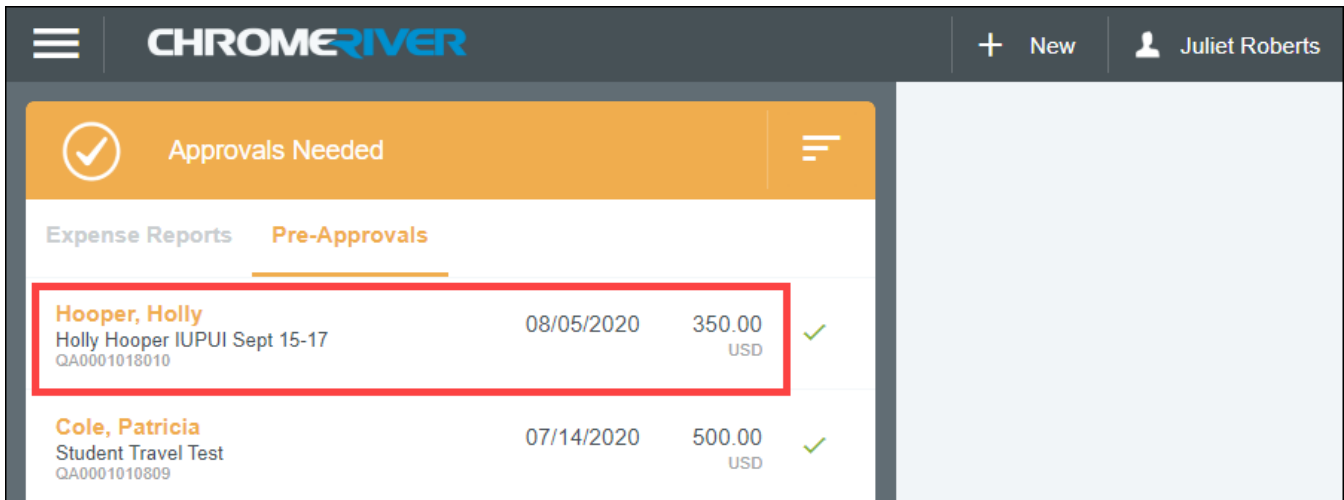
Review and Approve a Report

Pending Pre-Approval reports display in the **Approvals Needed** ribbon alongside pending expense reports. Click **Pre-Approvals** to view PA reports pending review.

In the screenshot below, Juliet Roberts has 9 pending Pre-Approvals.



A list of pending Pre-Approval reports opens. Limited details are shown, including the name of the Expense Owner, the date the report was submitted, the name of the PA report, and how much the traveler plans to spend. The report ID is also shown below the report name.



To view more details, click anywhere on the row containing the PA report you want to review. The report opens in the right-hand window.

In the example below, Holly Hooper is the Expense Owner, however, her delegate, Juliet Roberts, created the report on her behalf. The submission date, expected cost, report ID, and trip dates are shown as well.



☰
+ New Juliet Roberts

✓ Approvals Needed

Expense Reports	Pre-Approvals
Hooper, Holly Holly Hooper IUPUI Sept 15-17 <small>QA0001018010</small>	08/05/2020 350.00 USD ✓
Cole, Patricia Student Travel Test <small>QA0001010809</small>	07/14/2020 500.00 USD ✓
Cole, Patricia NonEmployee Test <small>QA0001010810</small>	07/14/2020 575.00 USD ✓
Cole, Patricia Student Group Test <small>QA0001010813</small>	07/14/2020 00,000.00 USD ⚠
Bean, Tammy 7/14 routing test <small>QA0001010818</small>	07/14/2020 1,175.00 USD ✓
Bean, Tammy Pre-Approvals on 07/24/2020 11:47 AM <small>QA0001014150</small>	07/24/2020 200.00 USD ✓

Open PDF Tracking Return Approve

Holly Hooper IUPUI Sept 15-17

Report Owner	Holly Hooper
Created By	Juliet Roberts
Submit Date	08/05/2020
Pay Me Amount	350.00 USD
PA Report ID	QA0001018010
From Date	09/15/2020
To Date	09/17/2020

Expense Summary

The second half of the PA report contains financial information about the trip, including the account number funding the trip.

In the example below, Holly expects to spend \$300 on lodging and \$50 on “Other.” The “Other” expense tile requires a written explanation and is used to document expenses such as mileage, per diem, conference/hotel fees, etc. **Always review the details of an “Other” expense.**

Bean, Tammy Pre-Approvals on 07/24/2020 11:47 AM <small>QA0001014150</small>	07/24/2020	200.00 USD ✓
Bean, Tammy Pre-Approvals on 07/27/2020 04:44 PM <small>QA0001017709</small>	07/27/2020	1,200.00 USD ✓
Bean, Tammy Pre-Approvals on 07/27/2020 05:35 PM <small>QA0001017710</small>	07/27/2020	1.00 USD ⚠
Cole, Patricia Mileage <small>QA0001017730</small>	07/28/2020	325.00 USD ✓

Expense Summary

	AMOUNT (USD)
Hotel	300.00
Other	50.00
Total	350.00

Account Summary

		AMOUNT (USD)
1915030	UA-PUR PURCHASING DEPARTMENT	350.00
Total		350.00

Open the report to review its details by clicking **Open** in the header of the report.



CHROME RIVER + New Juliet Roberts

Approvals Needed

Expense Reports	Pre-Approvals
Hooper, Holly Holly Hooper IUPUI Sept 15-17 QA0001018010	08/05/2020 350.00 USD ✓
Cole, Patricia Student Travel Test QA0001010809	07/14/2020 500.00 USD ✓
Cole, Patricia NonEmployee Test QA0001010810	07/14/2020 575.00 USD ✓
Cole, Patricia Student Group Test QA0001010813	07/14/2020 100,000.00 USD ⚠
Bean, Tammy 7/14 routing test QA0001010818	07/14/2020 1,175.00 USD ✓
Bean, Tammy Pre-Approvals on 07/24/2020 11:47 AM QA0001014150	07/24/2020 200.00 USD ✓

Holly Hooper IUPUI Sept 15-17

Report Owner: Holly Hooper
 Created By: Juliet Roberts
 Submit Date: 08/05/2020
 Pay Me Amount: 350.00 USD
 PA Report ID: QA0001018010
 From Date: 09/15/2020
 To Date: 09/17/2020

Expense Summary

Expenses populate in the left-hand window. Click on **Other** to view the submitter’s description of the expense in the righthand window.

In this case, Holly expects to spend \$50 on mileage.

CHROME RIVER + New Juliet Roberts

Pre-Approvals For Holly Hooper

Holly Hooper IUPUI Sept 15-17
 1 Comments 0 Attachments

EXPENSE	ESTIMATED
Hotel	300.00 USD
Other	50.00 USD

Other

Estimated Amount: 50.00 USD

Description: Mileage

As part of a complete fiscal review, assess all expenses and details before approving or returning the report.

Determine whether the travel will be booked via a designated travel agency (DTA) by reviewing the comments. If there is no comment, follow up with the traveler or their arranger via email and substantiate compliance (or exception, in rare cases) in the comments & attachments section.

If the Pre-Approval request is allowable and is for in-state or intercampus travel, **log a comment** substantiating your approval and click **Approve** to approve the trip. If the trip involves domestic or international travel, reassign the report to an Executive Approver or their designee. To reassign, see the [Reassign A Report](#) section of this document.



CHROME RIVER | + New | Juliet Roberts

Pre-Approvals For Holly Hooper

Holly Hooper IUPUI Sept 15-17
1 Comments | 0 Attachments

EXPENSE	ESTIMATED
Hotel	300.00 USD
Other	50.00 USD

Report Name: Holly Hooper IUPUI Sept 15-17
Trip Start Date: 09/15/2020

Comments (0)
FO Approved. | Post

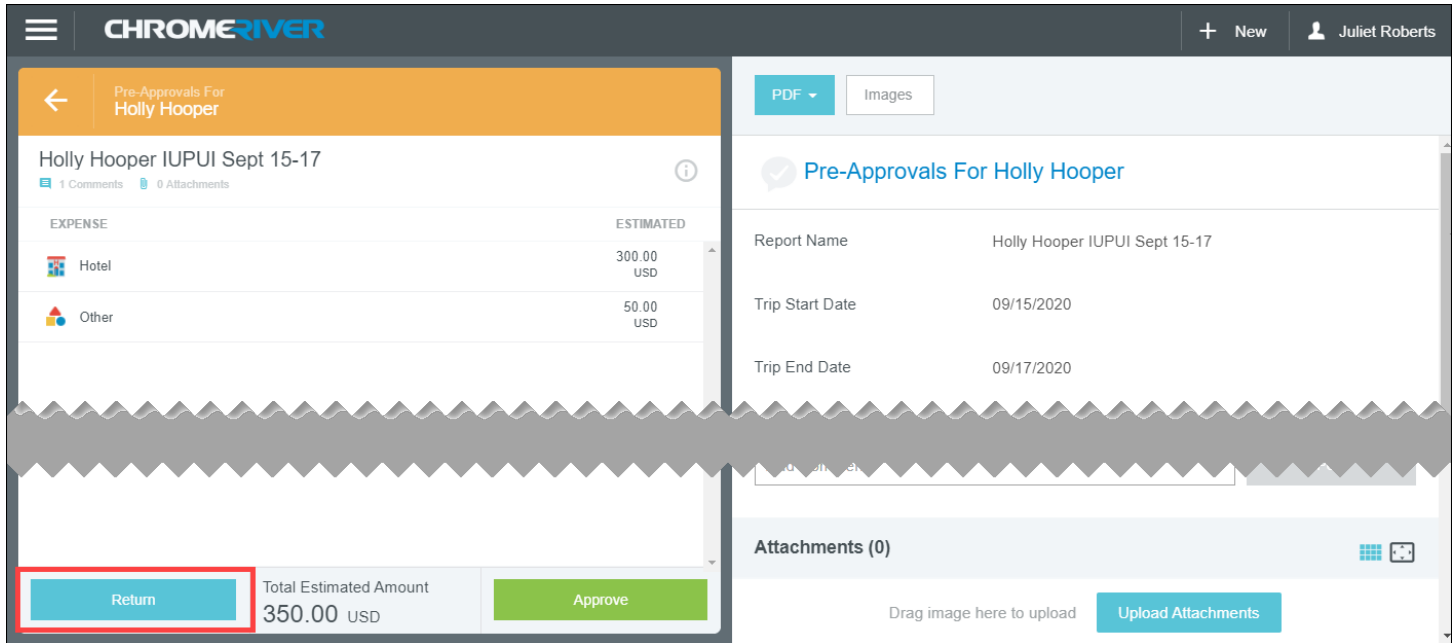
Attachments (0)
Drag image here to upload | Upload Attachments

Total Estimated Amount: 350.00 USD | Approve

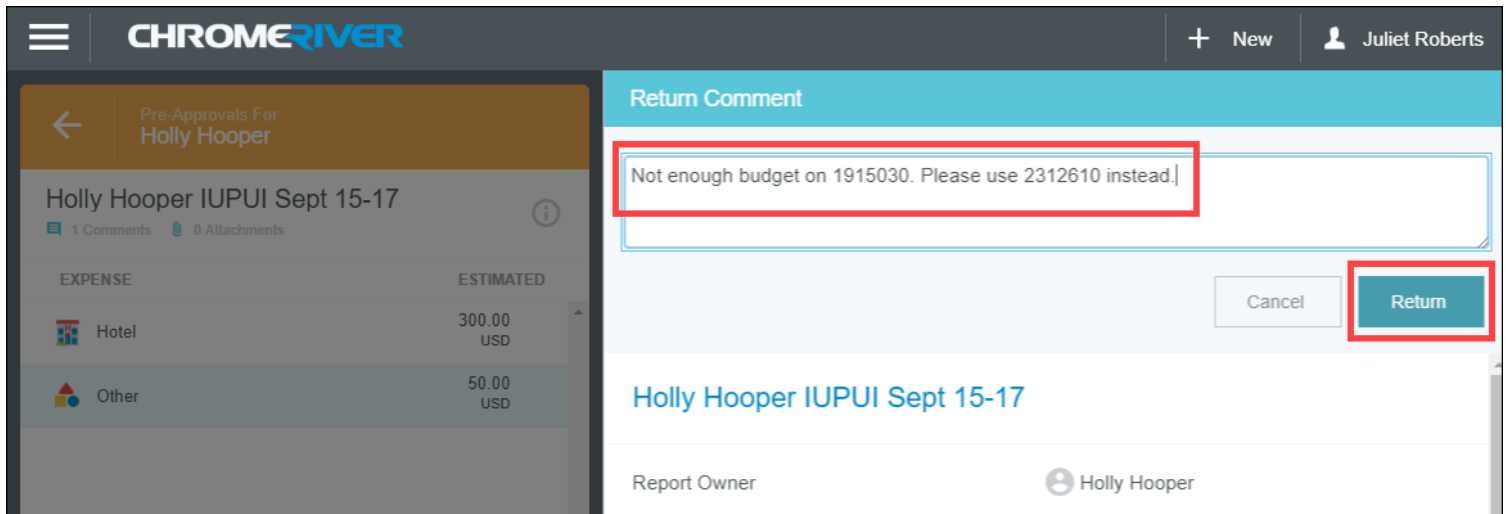


Return a Report

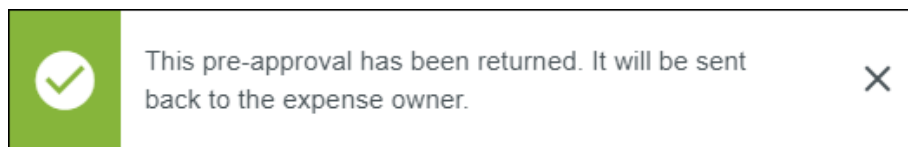
If the trip is unallowable or the report needs adjustment, return the report. This sends the PA back to the Expense Owner, who can adjust and resubmit the report or delete it. Click **Return** to return the report to the Expense Owner.



Chrome River prompts you to provide a comment explaining the return. Enter instructions for revising the report, or provide a reason for rejecting the trip. Click **Return** again to return the report.



A pop-up will confirm the return.





Reassign a Report

Until further notice, domestic and international university-sponsored trips require executive level approval from a Chancellor, Dean, AVP, or EVP. Ideally, the PA report is reassigned to an Executive Approver and approval action taken in Chrome River. Alternatively, written approval from an Executive Approver given in some other form, for example, via email, may be attached to the PA.

An Executive Approver may select the fiscal officer, travel document approver, or other designee to review and approve PAs on their behalf. In these situations, designees must log a comment on the PA stating that they are the Executive Approver's designee.

Reassigning a PA will route the report to an assignee you choose for review. This will remove the PA from your Approvals Needed ribbon and add it to the assignee's. Always complete a full fiscal review before **reassigning to an Executive Approver or their designee**.

To reassign, click on the **Menu** button, represented by three dots in the top right corner of the PA report, then click **Reassign**.

The screenshot shows the Chrome River interface. On the left, there is a table of Pre-Approvals:

Expense Reports	Pre-Approvals
Hooper, Holly Holly Hooper IUPUI Sept 15-17 QA0001018010	08/05/2020 350.00 USD ✓
Cole, Patricia Student Travel Test QA000101809	07/14/2020 500.00 USD ✓

On the right, the detailed view of a report is shown. The 'Reassign' button is highlighted with a red box. Below it, the report details are visible:

- Report Owner: Holly Hooper
- Created By: Juliet Roberts

Two fields will open: one to select the assignee and one to provide instructions. Search for the assignee by name or university ID (UID#). Use the [Person Lookup](#) task in One.IU to locate the approver's UID#.

The screenshot shows the 'Person Lookup' interface. It displays search results for 'Kuali Rice (All IU Campuses)'. The interface includes a search bar, a list of results, and a star rating system (0 stars shown).



Enter the individual's username in the **Principal Name** field.

Person Lookup * required field

Principal Name:	<input type="text" value="schavez2"/>
Principal ID:	<input type="text"/>
Entity ID:	<input type="text"/>
First Name:	<input type="text"/>
Middle Name:	<input type="text"/>
Last Name:	<input type="text"/>
Email Address:	<input type="text"/>
Phone Number:	<input type="text"/>
Employee ID:	<input type="text"/>
Campus Code:	<input type="text"/>
Primary Department Code:	<input type="text"/>
Employee Status Code:	<input type="text"/>
Employee Type Code:	<input type="text"/>
Active Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both
<input type="button" value="search"/> <input type="button" value="clear"/>	

One item retrieved.

Actions	Principal ID	Principal Name	Name	Entity ID	Campus Code	Primary Department Code	Employee ID
edit	0002000838	schavez2	Chavez, Sarah Julia	0002000838	BL	UA-ESTC	0002000838

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

If searching by name, ensure the position title matches that of the person for whom you're searching.

+ New
 Juliet Roberts

Reassign Report

Sarah Chavez
Student Temporary Staff - 2000292783

Sarah Chavez
Training and Documentation Spe - 0002000838



Enter a comment substantiating fiscal review and explaining the desired action. Click **Reassign**.

Reassign Report

Sarah Chavez - Training and Documentation Spe - 0002000838

FO Approved.
Sarah, please review and approve/return as appropriate. Thanks!

Cancel Reassign

A pop-up will confirm the reassignment.

