

Travel Office

325-942-2725

traveloffice@angelo.edu

Introduction to



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Login page and Dashboard

In order to access Chrome River, go to **Rampart > Employee > Travel > Chrome River**



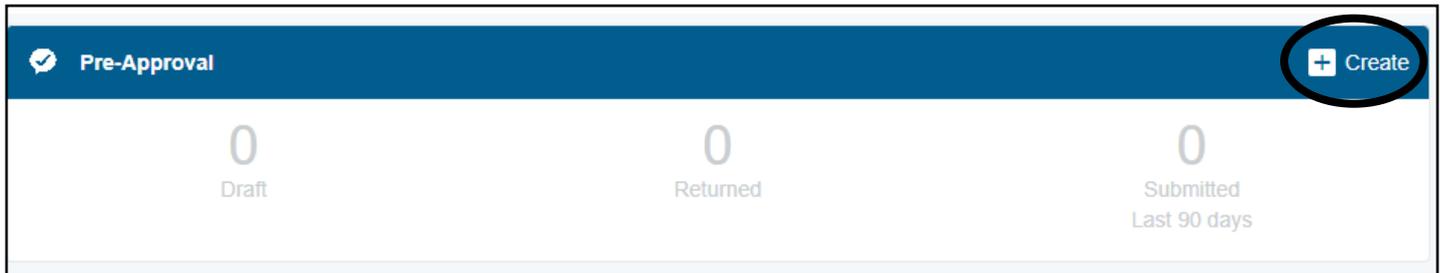
Once logged in, you will be presented with the Chrome River home dashboard.

The screenshot shows the Chrome River home dashboard. On the left is a navigation sidebar with the following items: 1. eWallet (Unused Items: 0 Credit Card Items, 23 Receipts, VIEW ALL 23 UNUSED ITEMS); 2. Expenses (0 Draft, 0 Returned, 0 Submitted Last 90 Days, 4 Create); 3. Pre-Approval (0 Draft, 0 Returned, 0 Submitted Last 90 days, 3 Create). On the right is the main content area with the ASU logo, CONTACT information (Travel Office: 325-942-2725, Email Us), NOTICES (FEATURE HIGHLIGHT: Emailing receipts to your account), and HELP information (Effective July 1 - December 31, 2022: Mileage rate - 62.5 cents, DO NOT USE 3RD PARTY BOOKING SITES - THEY DO NOT PROVIDE ITEMIZED RECEIPTS IN ACCORDANCE WITH STATE POLICIES, Important Links: Travel Office Policies Link, U.S Department of State Travel Advisories Link, Clery Act Travel Form MUST be attached to Expense Reports that include Student Travel with Lodging: Clery Act Travel Form Link). A legend box on the left side of the dashboard maps the numbers 1-8 to specific dashboard features.

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

Create a Pre-Approval Report for Travel

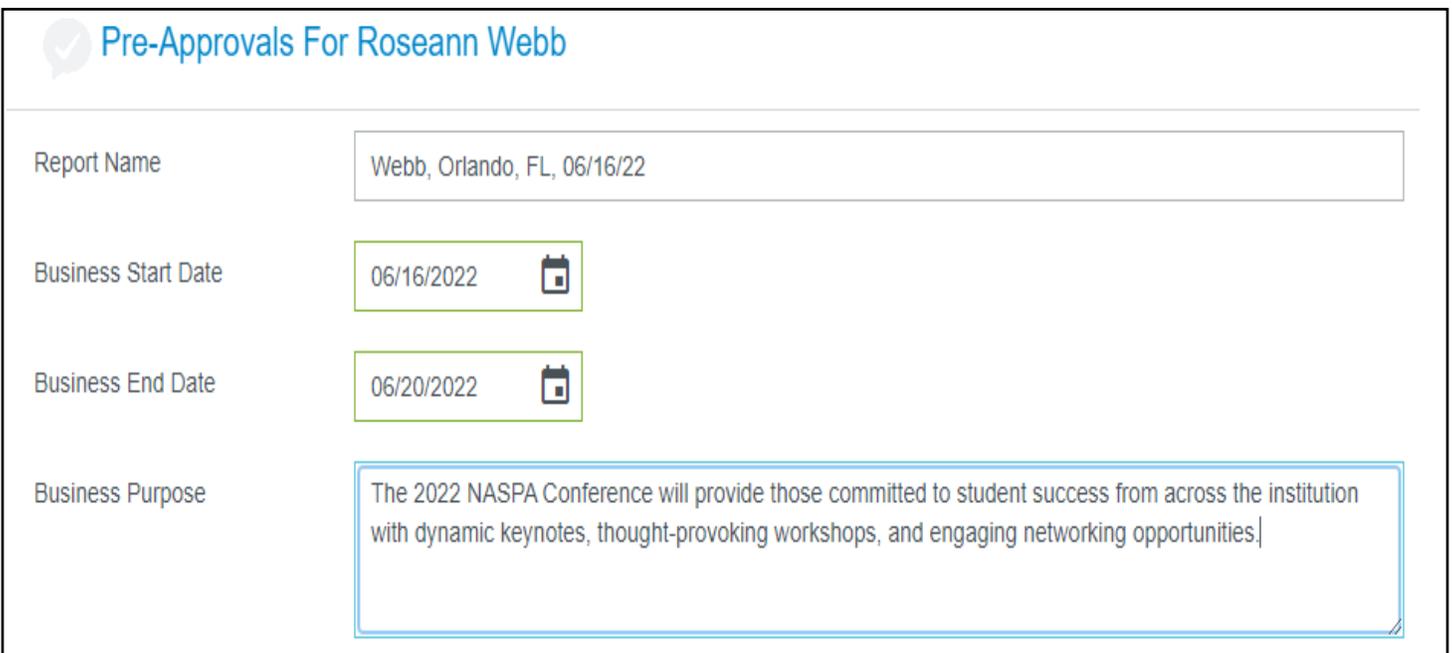
Click “Create” in the Pre-Approval row header.



The image shows a dashboard header for "Pre-Approval". It features a blue bar with a checkmark icon and the text "Pre-Approval". On the right side of this bar, there is a "Create" button with a plus sign icon, which is circled in red. Below the blue bar, there are three large numbers representing counts: "0 Draft", "0 Returned", and "0 Submitted Last 90 days".

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

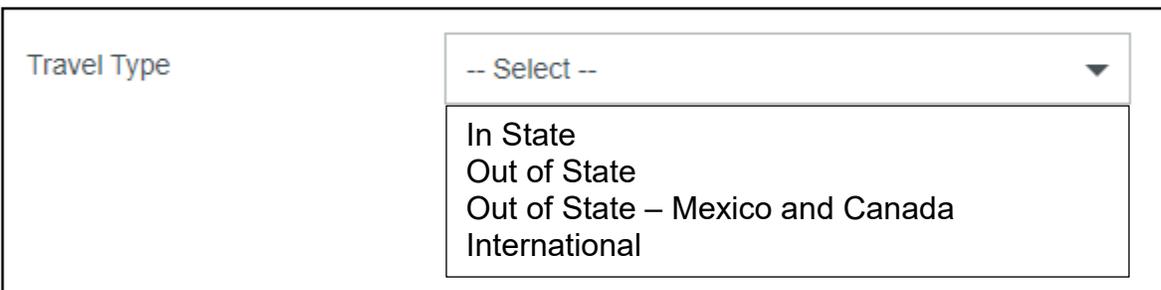
- Trip Name Standard: **Last Name – Destination Departure Date**
 - Example: Webb – Orlando, FL 06/16/22



The image shows a form titled "Pre-Approvals For Roseann Webb". It contains the following fields:

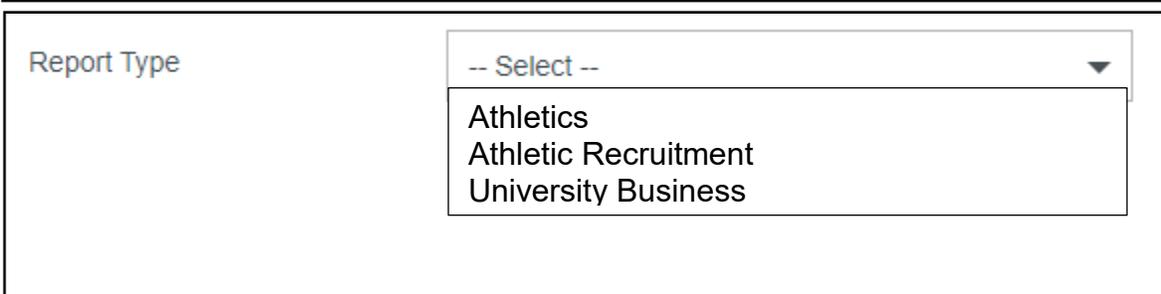
- Report Name:** Webb, Orlando, FL, 06/16/22
- Business Start Date:** 06/16/2022 (with a calendar icon)
- Business End Date:** 06/20/2022 (with a calendar icon)
- Business Purpose:** The 2022 NASPA Conference will provide those committed to student success from across the institution with dynamic keynotes, thought-provoking workshops, and engaging networking opportunities.

Continue completing the Pre-Approval header.



The image shows a dropdown menu for "Travel Type". The selected option is "-- Select --". The dropdown list contains the following options:

- In State
- Out of State
- Out of State – Mexico and Canada
- International



The image shows a dropdown menu for "Report Type". The selected option is "-- Select --". The dropdown list contains the following options:

- Athletics
- Athletic Recruitment
- University Business

Number of traveler(s)? -- Select --

Individual Travel

Two or more travelers

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

Number of traveler(s)? Two or more travelers

Provide Justification for two or more, and list the names of travelers. Roscoe Ram and I will be conducting a presentation

Destination Orlando, FL

Orlando, FL - 32801

Orlando, FL - 32802

Orlando, FL - 32803

Orlando, FL - 32804

Orlando, FL - 32805

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

No Cost to ASU Zero TAR for liability to be away from campus

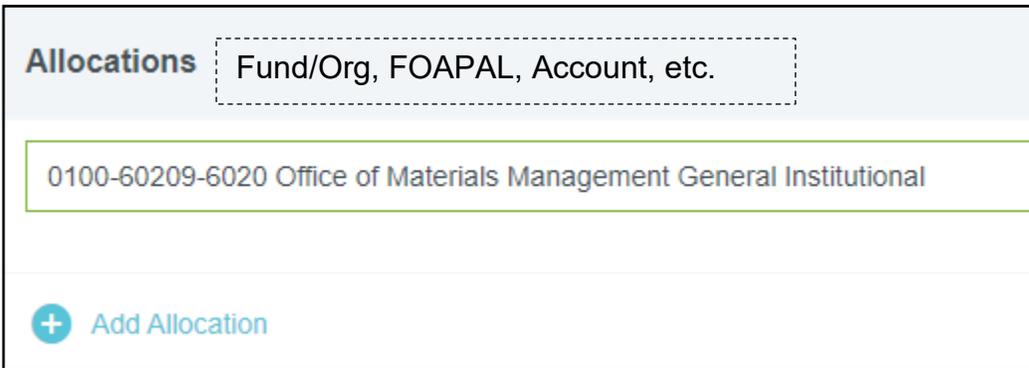
Will there be personal time during this trip? If yes, include information in the Business Purpose

Is this expense for a prospective employee?

I understand that I should keep all receipts for auditing purposes.

Check with Financial Manager to find funding allocation for this trip.

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



Allocations Fund/Org, FOAPAL, Account, etc.

0100-60209-6020 Office of Materials Management General Institutional

+ Add Allocation

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

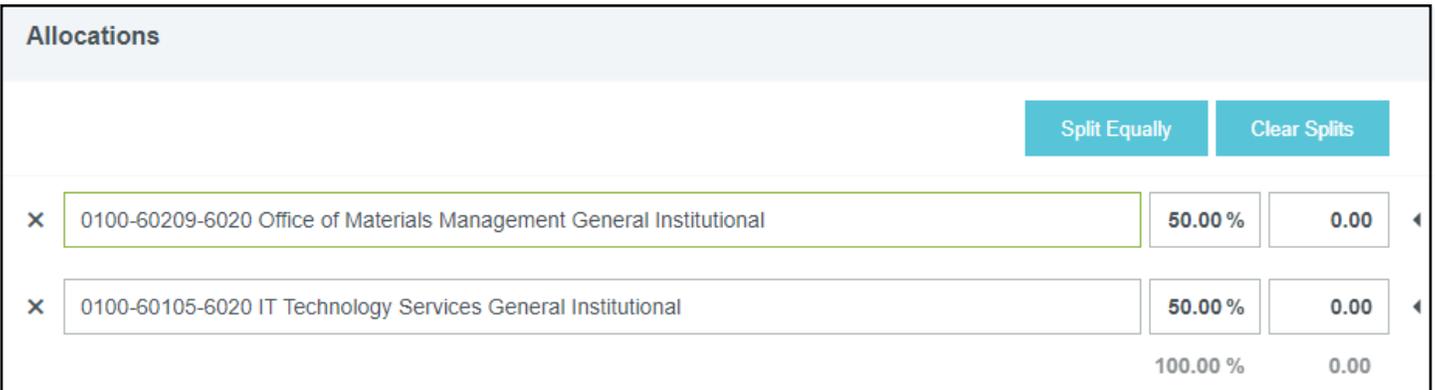


Allocations

0100-60209-6020 Office of Materials Management General Institutional

+ Add Allocation

Specify the percentages from each funding source and ensure they total 100%.

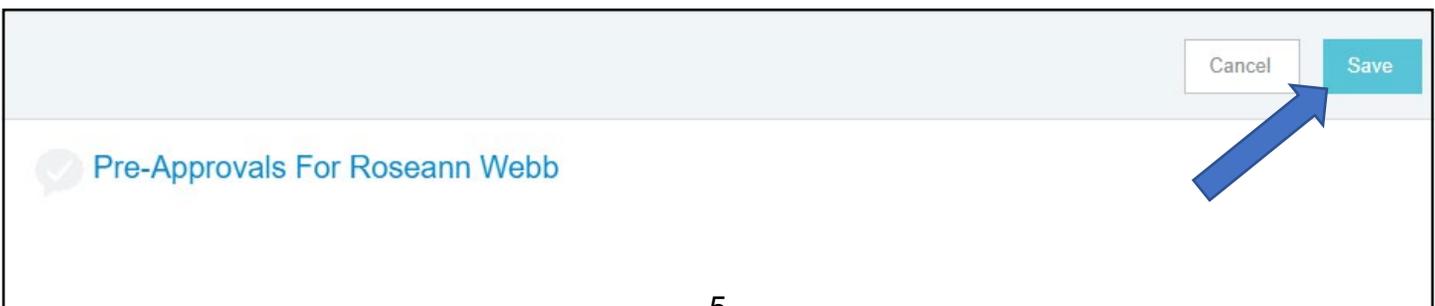


Allocations

Split Equally Clear Splits

x	0100-60209-6020 Office of Materials Management General Institutional	50.00%	0.00
x	0100-60105-6020 IT Technology Services General Institutional	50.00%	0.00
		100.00%	0.00

Click “Save” at the top of the form when you have completed all of the Pre-Approval header items.



Cancel Save

Pre-Approvals For Roseann Webb

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

PA Report ID QA0001267078	Total Estimated Amount 0.00 USD	Submit
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Once saved, the “Add Pre-Approval Types” mosaic page will appear on the right-hand side for you to enter travel cost estimates based on the expenses you expect to incur.

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

Add Pre-Approval Types

The image shows a mosaic of seven expense category tiles. From left to right, they are: AIRFARE (with an airplane icon), GROUND TRANSPORTATION (with a car icon and a blue arrow pointing up to it), LODGING (with a bed icon), MEALS (with a fork and knife icon), REGISTRATION (with a person at a computer icon), ATHLETIC TOURNAMENT ENTRY/TICKETS (with a person at a computer icon), and MISCELLANEOUS (with a colorful geometric icon).

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

The navigation bar is dark blue and contains a white left-pointing arrow, the text "Pre-Approvals For Roseann Webb", a white right-pointing arrow, and a white plus sign icon.

Rental Vehicle

Ground Transportation > Rental Vehicle

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

 **Rental Vehicle**

Estimated Amount	<input type="text" value="100.00"/> <input type="button" value="Calculator"/> <input type="text" value="USD"/>
Additional Comments <small>Optional</small>	<input type="text"/>
Car Rental Agency	<input type="text" value="Enterprise"/> <input type="button" value="v"/>
Paid By	<input type="text" value="Traveler Reimbursement"/> <input type="button" value="v"/>
Is there a student traveling? <small>Optional</small>	<input type="text" value="-- Select --"/> <input type="button" value="v"/>
GL_ACCT	<div style="border: 1px solid black; padding: 5px;"><p>No</p><p>Yes – Advisor Accompanying</p><p>Yes – Advisor NOT Accompanying</p></div>

Lodging

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

 **Lodging**

Allowable Total	<input type="text" value="0.00"/> <input type="text" value="USD"/>	Calculate
Estimated Amount	<input type="text" value="0.00"/> <input type="text" value="USD"/>	

Enter the business “Start Date” and business “End Date”

Calculate Allowable Total
✕

Start Date	<input style="width: 90%;" type="text" value="06/16/2022"/>	
End Date	<input style="width: 90%;" type="text" value="06/20/2022"/>	
Location	<input style="width: 95%;" type="text" value="Orlando-Orange County, Florida (FL), United States"/>	
Rooms	<input style="width: 50%;" type="text" value="1"/>	

Nights	4
Average Daily Room Rate	129.00 USD
Base Total	516.00 USD
Allowable Total	516.00 USD

Allowable Total: GSA amount without taxes and other fees.

Enter the "Allowable Total" in the "Lodging" text box and add the estimated taxes/fees

Lodging

Allowable Total	<input style="width: 90%;" type="text" value="516.00"/>	<input style="width: 80%;" type="text" value="USD"/>	Calculate
Estimated Amount	<input style="width: 90%;" type="text" value="551.62"/>	<input style="width: 80%;" type="text" value="USD"/>	
Lodging	<input style="width: 90%;" type="text" value="516.00"/>		
Taxes/Fees	<input style="width: 90%;" type="text" value="35.62"/>		

If there is a justification for paying more than the GSA amount, complete the “Lodging Overage” section and the “Additional Comments” section.

Lodging Overage Justification <small>Optional</small>	-- Select --
	Decreased total cost Reducing meal reimbursement rate to increase lodging rate Other special needs Unavailability of Services Other (please explain)

Mileage

Mileage is automatically calculated through the Google Maps tool

Ground Transportation > Mileage

 **Mileage**

Date 

Click on Calculate Mileage button to access Google Maps app.

Estimated Amount

Additional Comments
Optional

Rate

Miles  [Calculate Mileage](#) 



Click "Return to Start" to calculate the roundtrip mileage and click "Save Trip".

Calculate Mileage ✕

San Angelo, TX, USA

Orlando, FL, USA

+ Add Destination Return to Start

1324.63 Miles

Map Satellite

Save Trip



Mileage

Date

08/17/2022



Click on Calculate Mileage button to access Google Maps app.

Estimated Amount

1,483.92

USD

Additional Comments

Optional

From: San Angelo, TX, USA

To: Orlando, FL, USA

To: San Angelo, TX, USA

Rate

0.56

Miles

2,649.86

Calculate Mileage

Deduction

None

GL_ACCT

7112

Airfare

If airfare will be paid using the BTA (Business Travel Account), you must first get a quote from Nancy at Horizons Travel **BEFORE** completing the Pre-Approval.

Once you have the quote, click the "Airfare" tile and click "Airfare".

The Paid By option will be "Pre Pay on BTA (Business Travel Account)".

 **Airfare**

Estimated Amount	500.00  USD
Additional Comments <small>Optional</small>	<input type="text"/>
Paid By	-- Select -- Athletic Travel Card Pre Pay on BTA (Business Travel Account) Traveler Reimbursement

Horizons charges an Agency Service Fee. This must be listed separately from the Airfare expense.

 **Airline Service Charge**

Estimated Amount	35.00  USD
Paid By	Pre Pay on BTA (Business Travel Account)
Additional Comments <small>Optional</small>	<input type="text"/>
GL_ACCT	7115

Complete the other travel tiles as applicable.

TAR – Incidentals are now documented within specific tiles'

- Gas – Ground Transportation > Fuel
- Parking – Ground Transportation > Parking
- Baggage Fees – Airfare > Baggage Fees

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

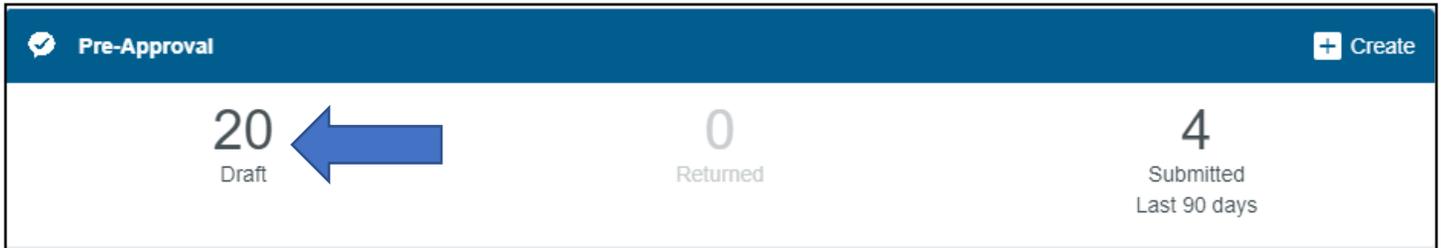
Webb - Orlando, FL 06/16/22		
EXPENSE		ESTIMATED
 Rental Vehicle		100.00 USD
 Lodging		551.62 USD
 Meals		200.00 USD
 Fuel		100.00 USD
 Baggage Fees		20.00 USD
 Airfare		500.00 USD
 Airline Service Charge		35.00 USD

Notice the PA Report ID in the lower left-hand part of the dashboard. You will use this ID when referencing an issue with the ASU Travel Office.

PA Report ID QA0001267078		Total Estimated Amount 1,506.62 USD
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Accessing a Draft Pre-Approval Report

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



Pre-Approval + Create

20 Draft	0 Returned	4 Submitted Last 90 days
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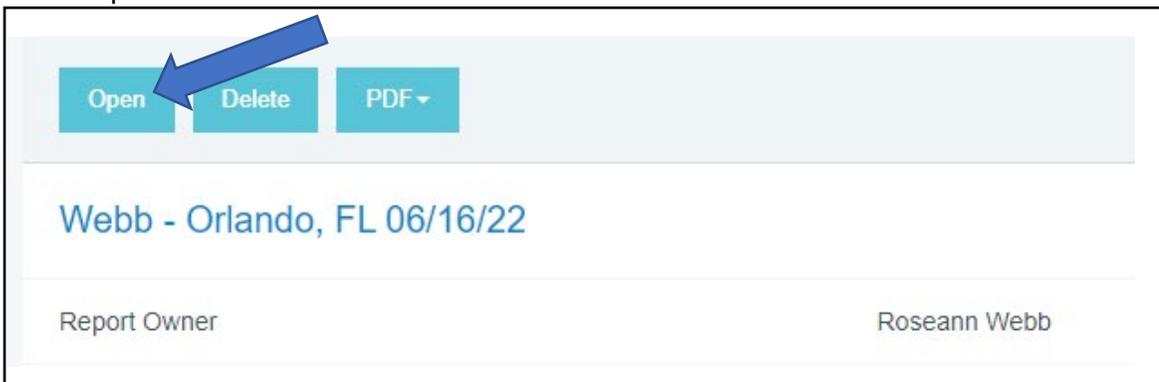
A blue arrow points to the '20 Draft' count.

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



Webb - Orlando, FL 06/16/22 QA0001267078	08/17/2022	1,506.62 USD
--	------------	-----------------

Click “Open”.



Open Delete PDF ▾

Webb - Orlando, FL 06/16/22

Report Owner: Roseann Webb

A blue arrow points to the 'Open' button.

Click “Edit”



PDF ▾ Images Delete Edit

Pre-Approvals For Roseann Webb

Report Name: Webb - Orlando, FL 06/16/22

A blue arrow points to the 'Edit' button.

Notice the “Attachments” section at the bottom of the header. If you need to provide a long list of travelers, this is where you can upload the attachment as a PDF, PNG, JPEG, or OFD file.

View a Pre-Approval Report in PDF

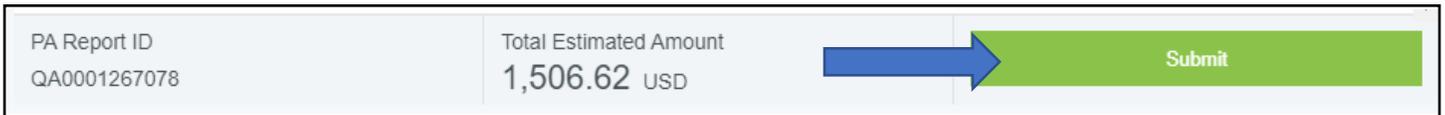
For a printable version of your Pre-Approval Report, click on a Pre-Approval and click “PDF”.



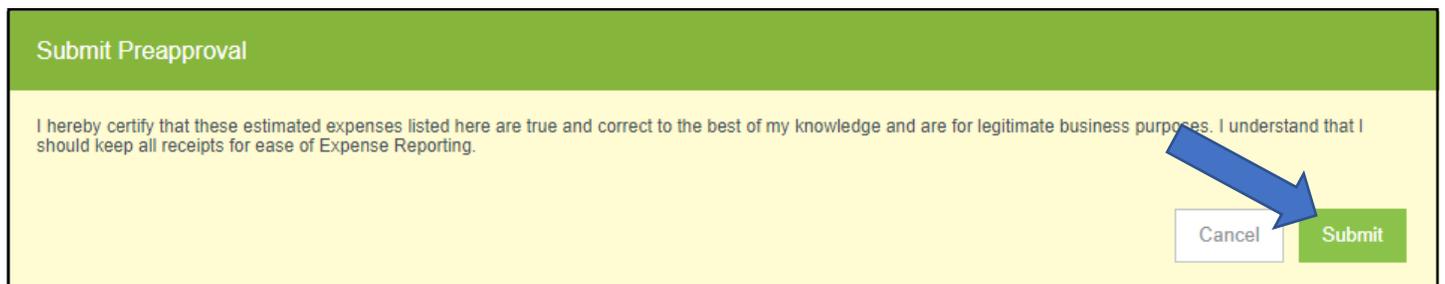
NOTE: If you do not see a particular button, you may need to maximize your window.

Submitting a Pre-Approval Report

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



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



If an error message appears, correct the error and resubmit until no error messages appear.

The submitted Pre-Approval will appear in the left-hand side of the dashboard.

The screenshot shows the Chrome River dashboard with three main sections: eWallet, Expenses, and Pre-Approval. The Pre-Approval section is highlighted with a blue box and an arrow pointing to the 'Submitted Last 90 Days' count of 2.

Category	Draft	Returned	Submitted Last 90 Days
Unused Items	0	0	0
Expenses	4	0	4
Pre-Approval	0	0	2

The Pre-approval will be sent through you designated approval workflow.

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

The email notification is from expense-noreply-qa@chromefile.com to Rosie Webb. It contains a table with the following details:

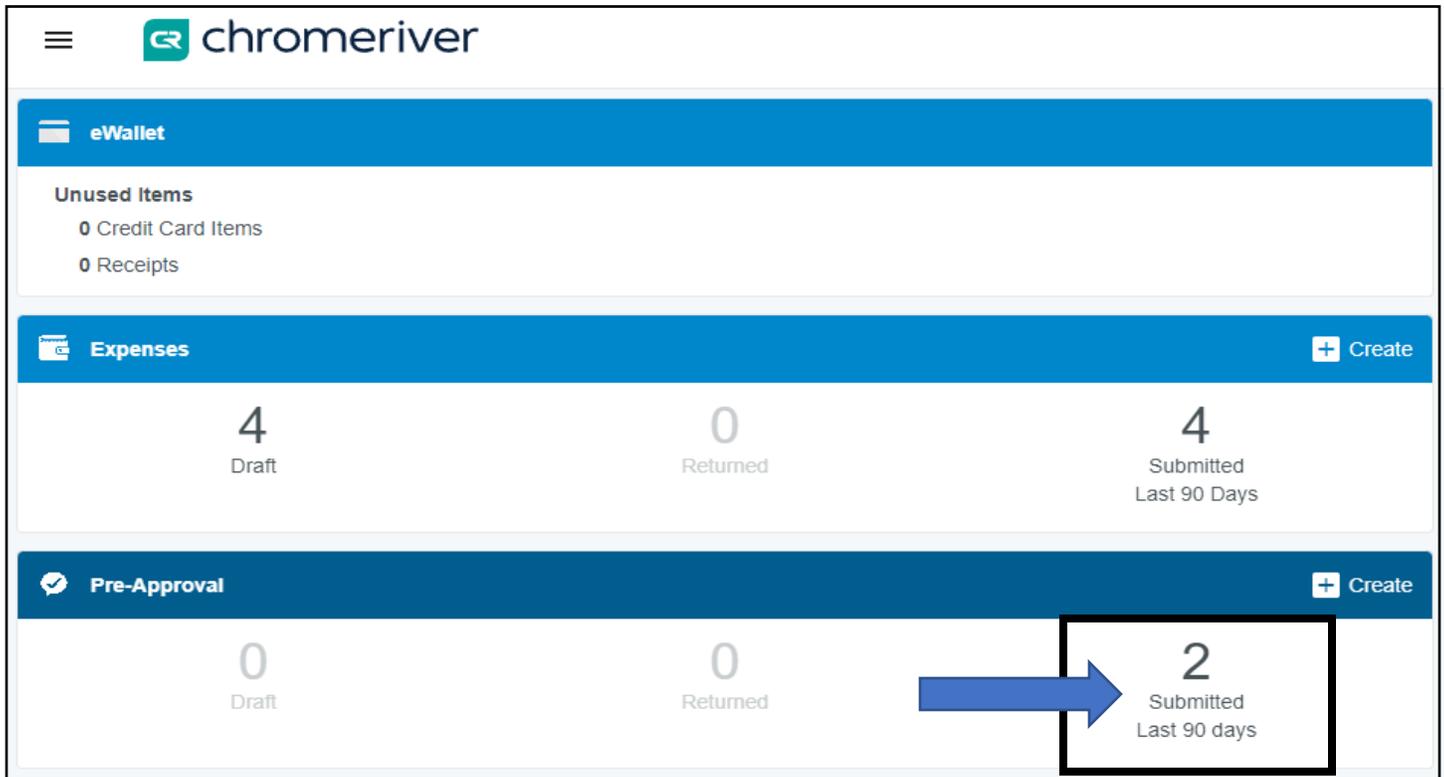
NO ACTION REQUIRED		Chrome River
The following Pre-Approval Request has been approved.		
Pre-Approval Request For	Roseann Webb	
Report Name	Webb, Orlando, FL, 06/16/22	
Pre-Approval ID	QA00-0126-7021	
Submit Date	08/11/2022	
Expense Dates	06/16/2022 - 06/20/2022	
Total Expenses	1,756.00 USD	

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

Recall a Pre-Approval Report

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

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



The screenshot shows the Chromeriver dashboard. At the top, there is a navigation menu with a hamburger icon and the Chromeriver logo. Below this, there are three main sections: 'eWallet', 'Expenses', and 'Pre-Approval'. The 'Pre-Approval' section is highlighted with a blue header and contains a table with the following data:

Category	Count
Draft	0
Returned	0
Submitted Last 90 days	2

A blue arrow points from the 'Submitted Last 90 days' count to the right, indicating the next step in the process.

Click the pre-approval report to open it.

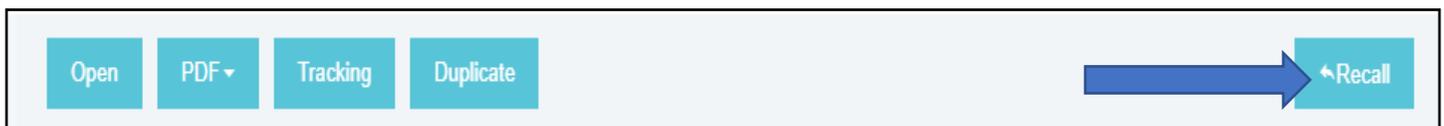


The screenshot shows a 'Submitted' pre-approval report card. The card has a blue header with a checkmark icon and the word 'Submitted'. Below the header, there is a table with the following data:

Title	Date	Amount	Status
Webb - Orlando, FL 6/19/22 QA0001267083	08/17/2022	500.00 USD	PENDING

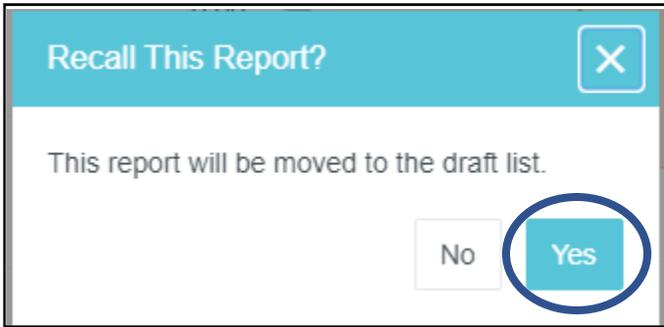
A blue arrow points to the title 'Webb - Orlando, FL 6/19/22', indicating the next step in the process.

Click “Recall”.

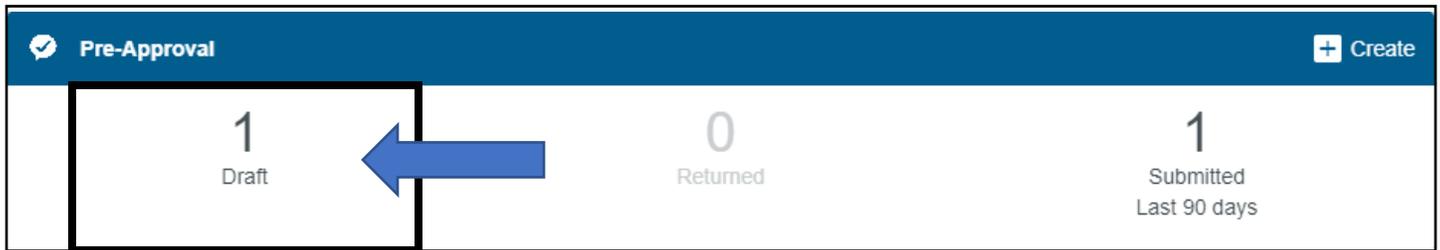


The screenshot shows the action menu for a pre-approval report. The menu contains four buttons: 'Open', 'PDF', 'Tracking', and 'Duplicate'. A blue arrow points to the 'Recall' button, which is located to the right of the other buttons.

Click "Yes".

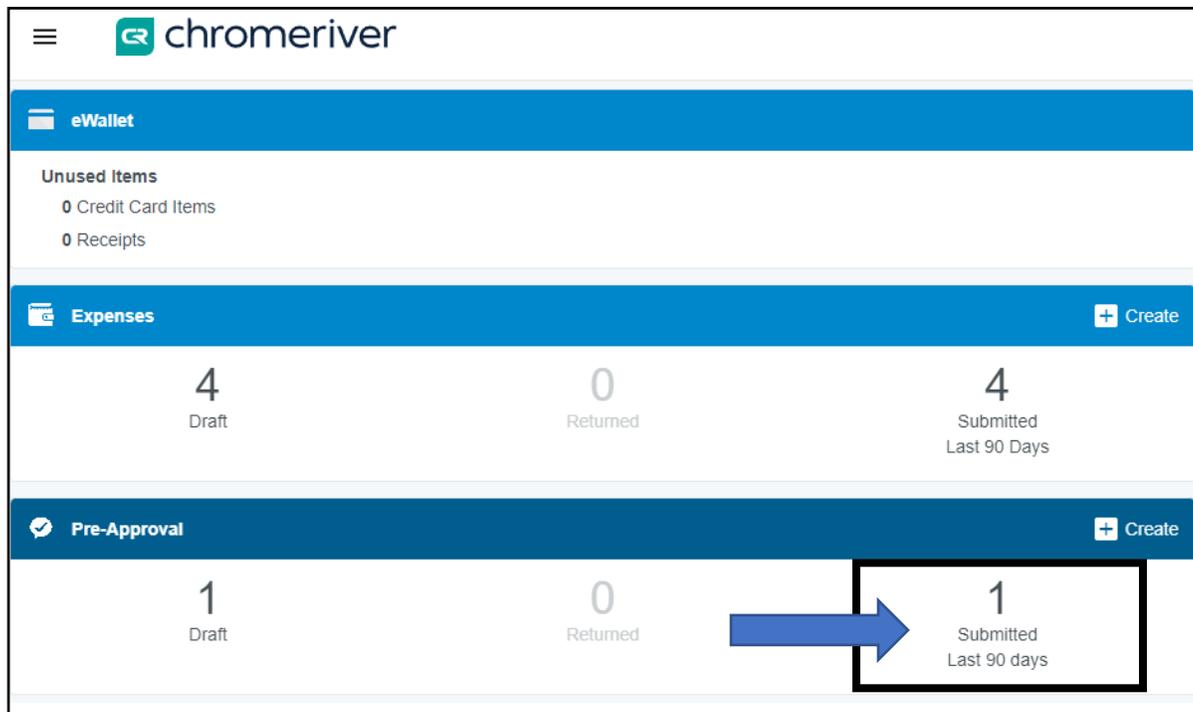


The Pre-Approval Report will now be listed in the "Draft" section.



Track a Pre-Approval Report

Click "Submitted Last 90 Days" to access list of pre-approval reports.

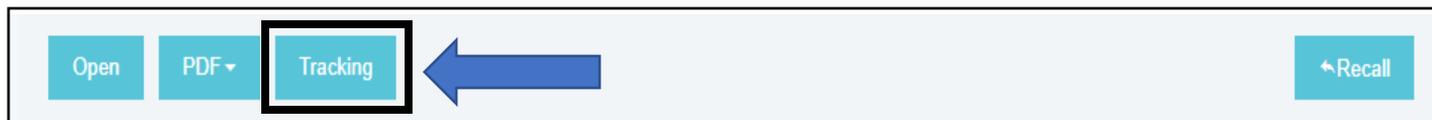


Click the pre-approval report to open it.



The image shows a header for a submitted report. On the left, there is a checkmark icon and the word "Submitted". Below this, the report title is "Webb - Orlando, FL 6/19/22" with a smaller ID "QA0001287083" underneath. A blue arrow points to the report title. To the right of the title is the date "08/17/2022". Further right is the amount "500.00 USD" and a "PENDING" status button.

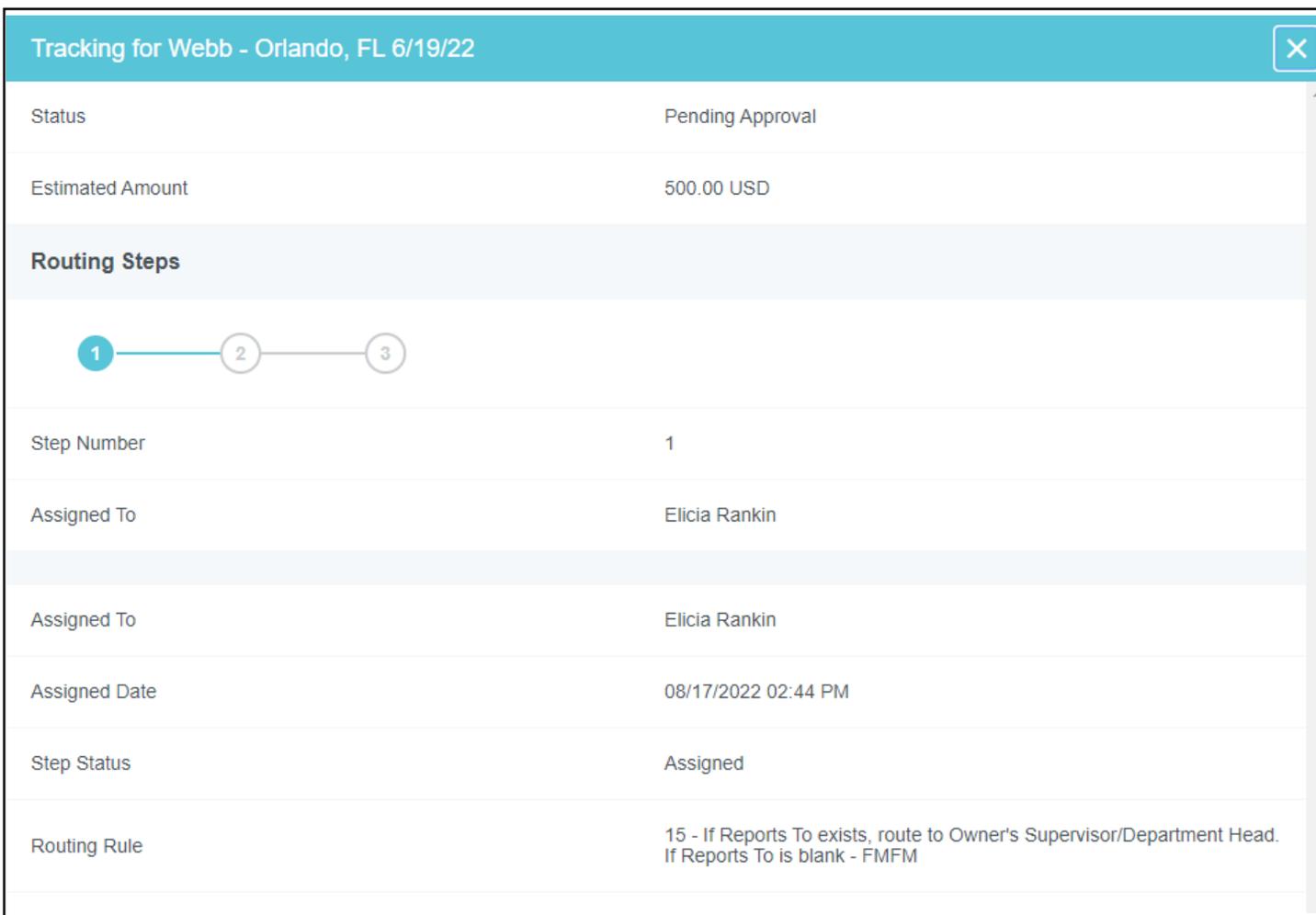
Click "Tracking".



The image shows a row of action buttons: "Open", "PDF", "Tracking", and "Recall". The "Tracking" button is highlighted with a black border and a blue arrow points to it from the right.

NOTE: If you do not see a particular button, you may need to maximize your window.

In the tracking window, you can see the Routing Steps and who is assigned to approve.



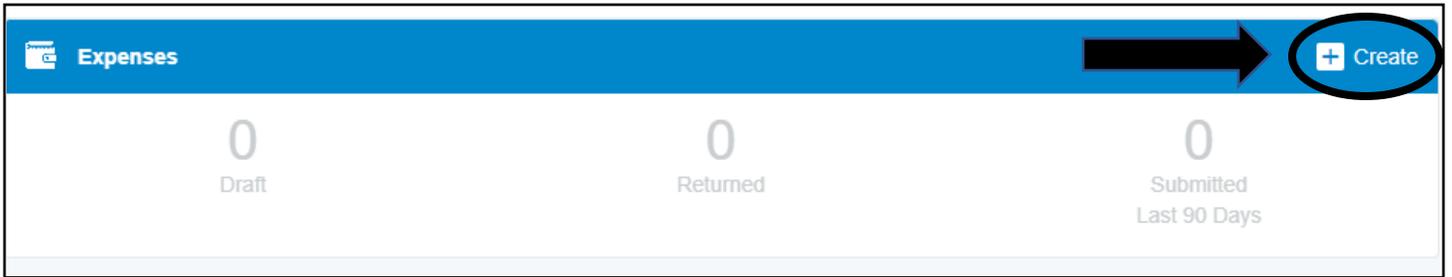
The image shows a tracking window titled "Tracking for Webb - Orlando, FL 6/19/22". It contains the following information:

Status	Pending Approval
Estimated Amount	500.00 USD
Routing Steps	
	
Step Number	1
Assigned To	Elicia Rankin
Assigned To	Elicia Rankin
Assigned Date	08/17/2022 02:44 PM
Step Status	Assigned
Routing Rule	15 - If Reports To exists, route to Owner's Supervisor/Department Head. If Reports To is blank - FMFM

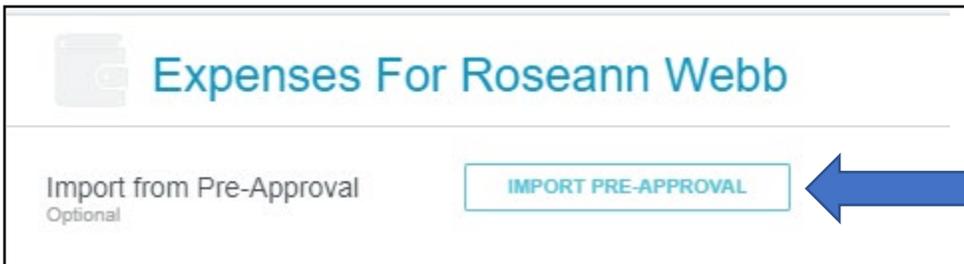
NOTE: Approvers for each step are identified in Banner. If you notice a discrepancy, please contact the Travel Office immediately.

Create an Expense Report for Travel

Click “Create” in the Expense Report header row.



Click “Import Pre-Approval”.



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

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



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

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

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

Ensure each field is completed and click "Save" to proceed to the next section to enter your expenses.

Webb, Orlando, FL, 06/16/22

0 Comments 0 Attachments

DATE	EXPENSE	SPENT	PAY ME	
Mon 06/20/2022	 Registration	500.00 USD	500.00	✓
Mon 06/20/2022	 Meals	120.00 USD	120.00	✓
Mon 06/20/2022	 Airfare	600.00 USD	600.00	✓
Mon 06/20/2022	 Lodging	536.00 USD	0.00	⚠

Expense Report QA0053347973 

Total Pay Me Amount **1,220.00** USD

Submit

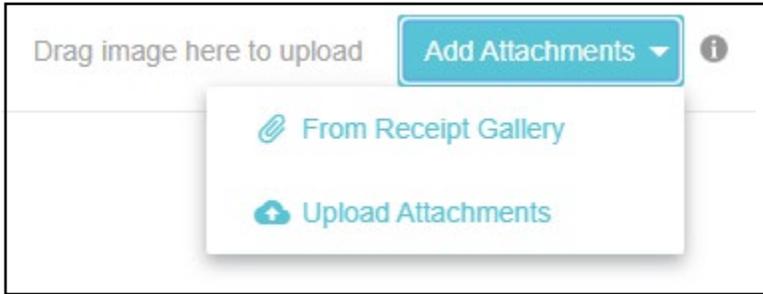
Notice the Expense Report ID is different than the PA Report ID.

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

Images Edit Delete ...

 Meals

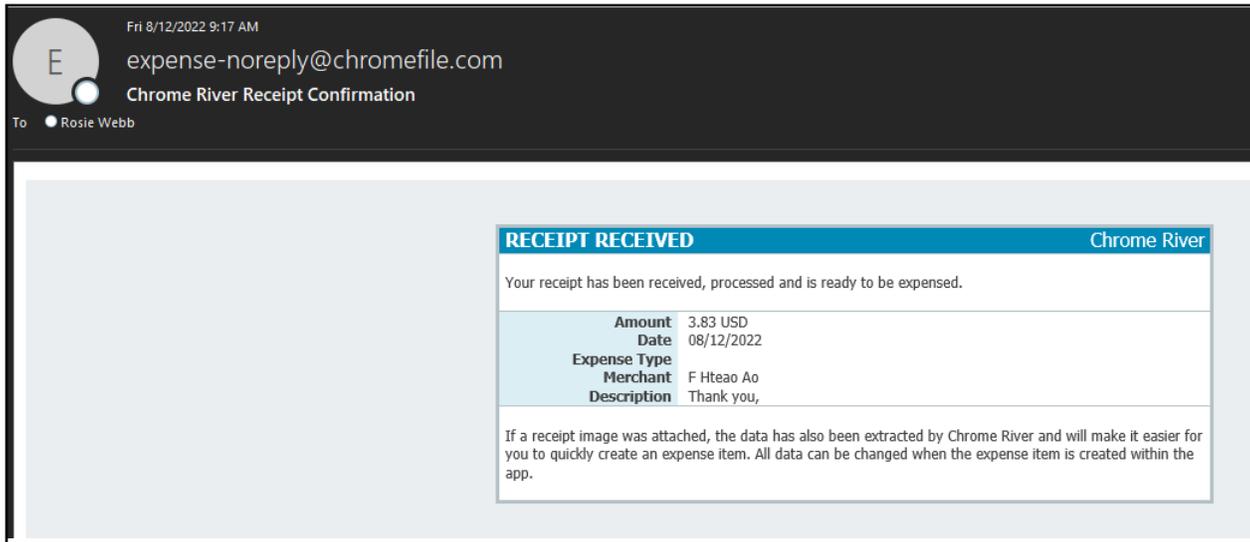
To add a receipt, click and drag the receipt image into the browser window or use the “Add Attachments – Upload Attachments” button to upload the receipt into the system.



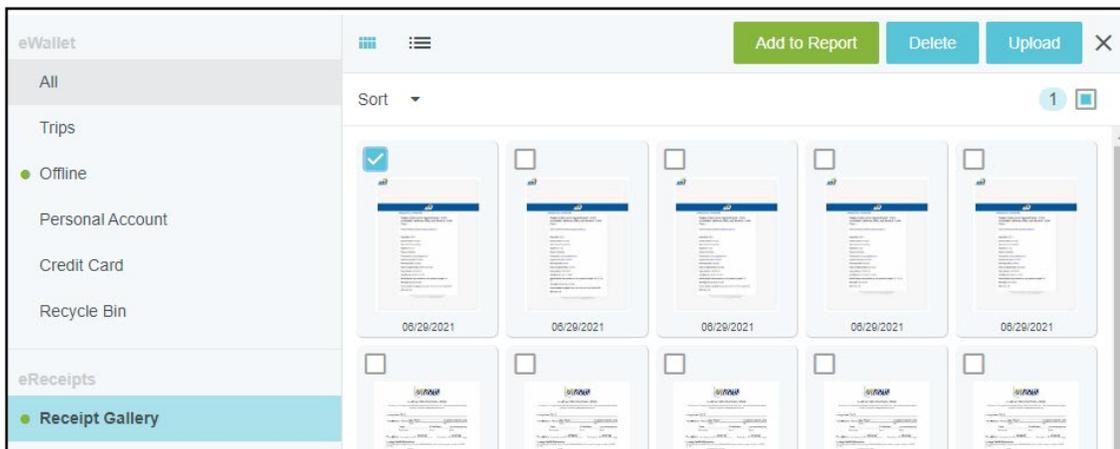
Scan and Send Receipts

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

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



NOTE: Keep your original receipts for three years plus the current fiscal year!

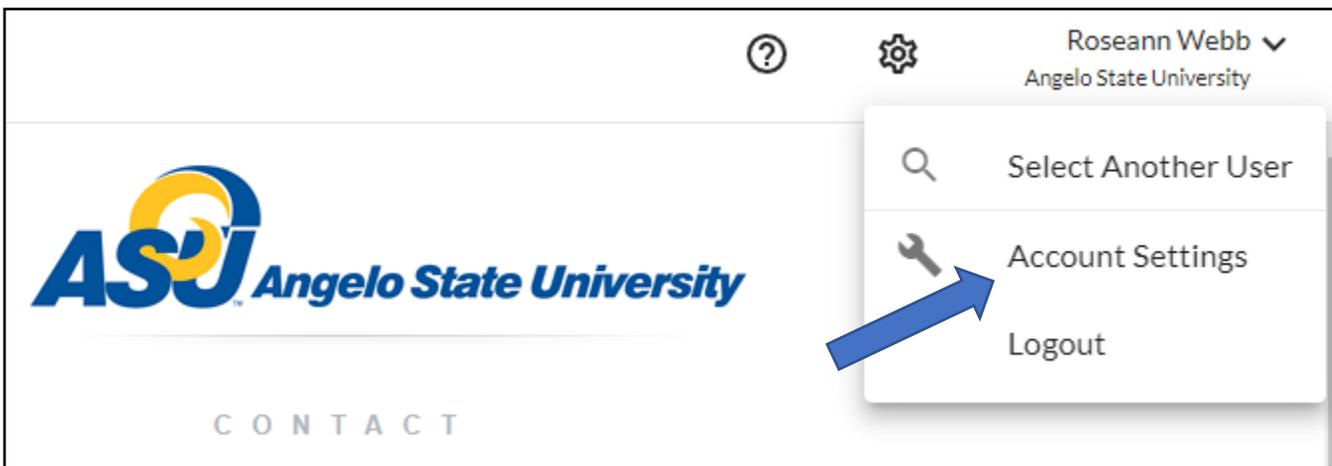


Delegates

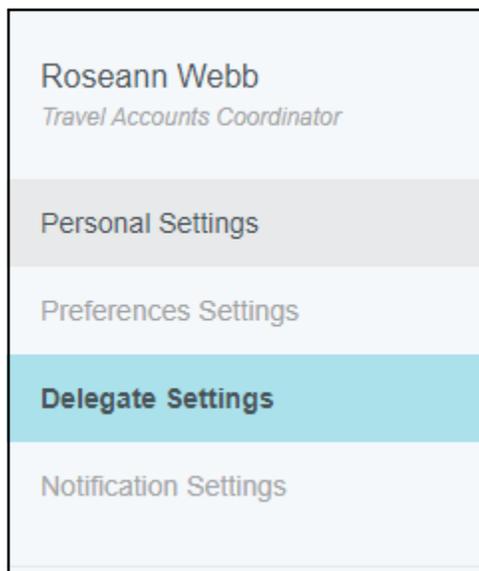
Chrome River offers two types of delegation to allow users to create and approve expense reports for each other at ASU.

- **Delegate:**
 - Create pre-approvals and expense reports for another user and access his or her Settings menu, Home screen, and Inquiry reports. You will receive any e-mail notifications regarding rejection or adjustment of reports created for the user.
 - You will not be able to approve expenses that are routed to the user.
- **Approval Delegate:**
 - **Temporarily** approve expenses and pre-approvals for another user, via e-mail. You will not be able to access the user's Approval screen. Not everyone will qualify to be an approval delegate.
 - Refer to the "FY 22 Succession Plan" to look up who can be an approval delegate.

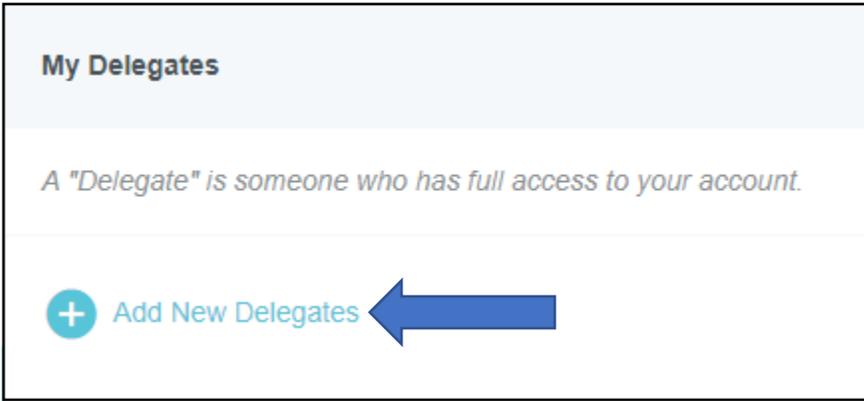
Click your name in the top right-hand side of the dashboard to reveal a menu and select "Account Settings".



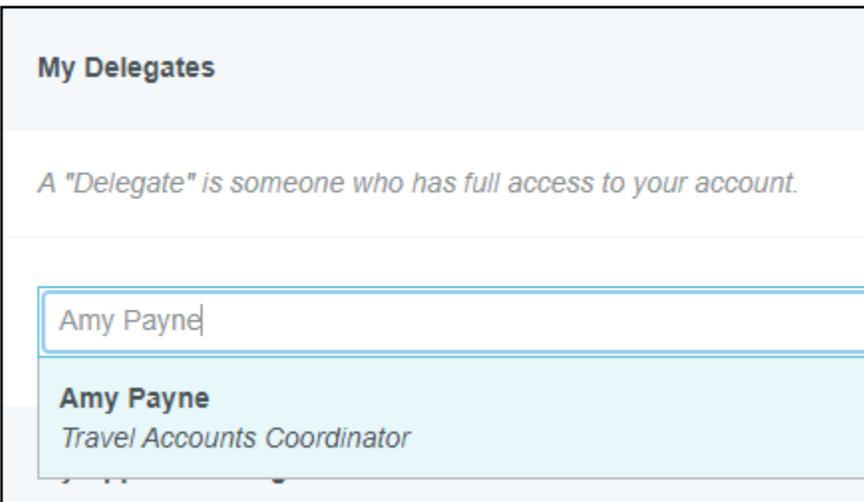
Another menu will appear on the left-hand side of the dashboard. Click "Delegate Settings".



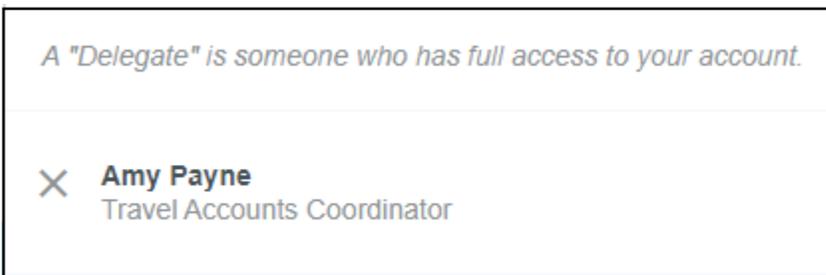
Click the appropriate “+ Add New Delegates” depending on the type of Delegate you wish to assign.



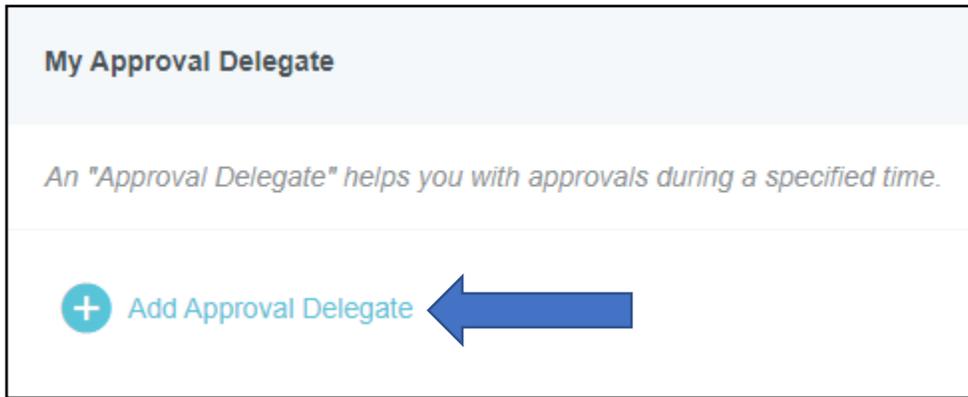
Type in the name of the person to find them in the drop-down list and select.



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



To add an Approval Delegate, click "+ Add Approval Delegate".

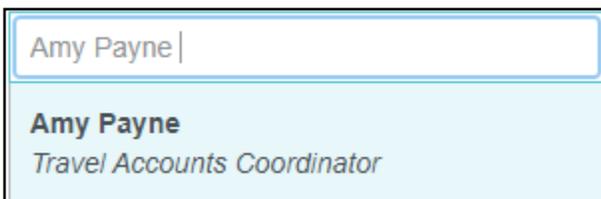


My Approval Delegate

An "Approval Delegate" helps you with approvals during a specified time.

[+ Add Approval Delegate](#) 

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

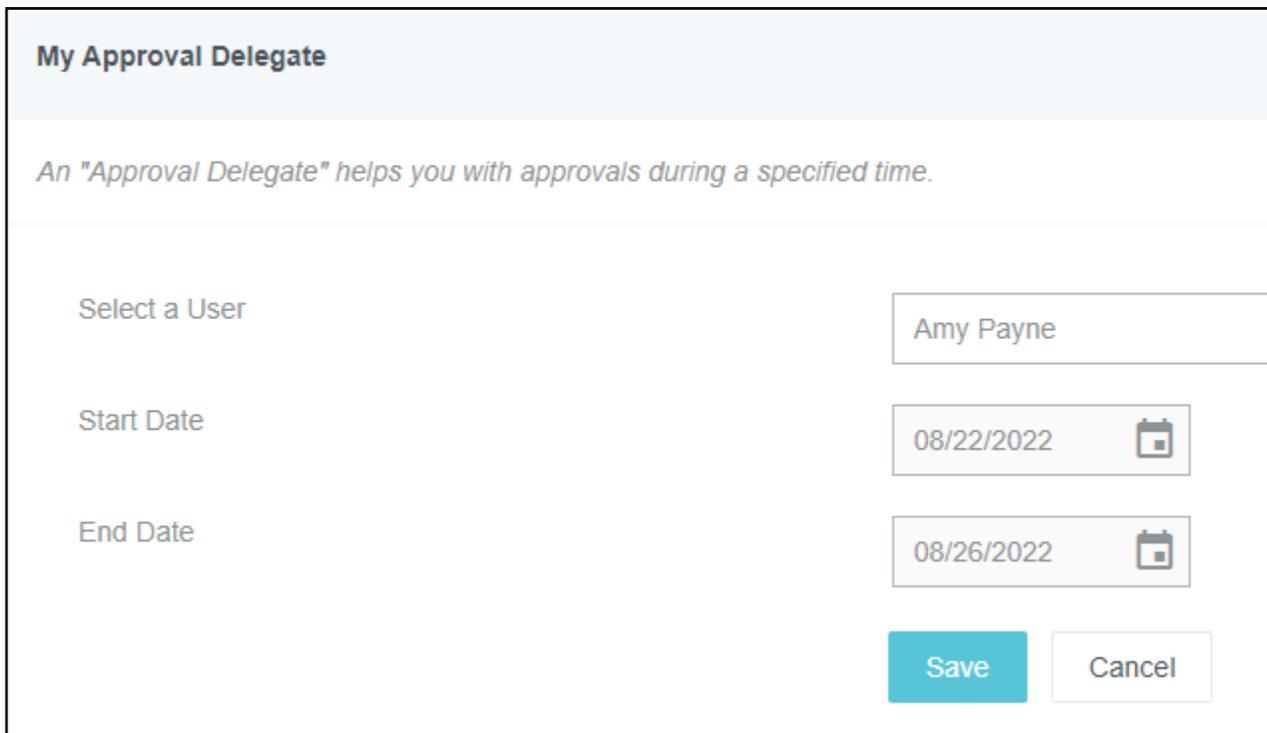


Amy Payne |

Amy Payne
Travel Accounts Coordinator

Enter the start and end date for the approver.

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



My Approval Delegate

An "Approval Delegate" helps you with approvals during a specified time.

Select a User

Start Date 

End Date 

Click "Save" and the approval delegate will appear in the list.

My Approval Delegate

An "Approval Delegate" helps you with approvals during a specified time.

 **Amy Payne(08/22/2022-08/26/2022)**
Travel Accounts Coordinator

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

Thu 8/18/2022 8:50 AM

 **expense-noreply-qa@chromefile.com**

You have been assigned as an Approval Delegate

To  Amy Payne;  Rosie Webb

Roseann Webb has assigned you to be their approval delegate between the following dates:

Start Date : 08/22/2022
End Date : 08/26/2022