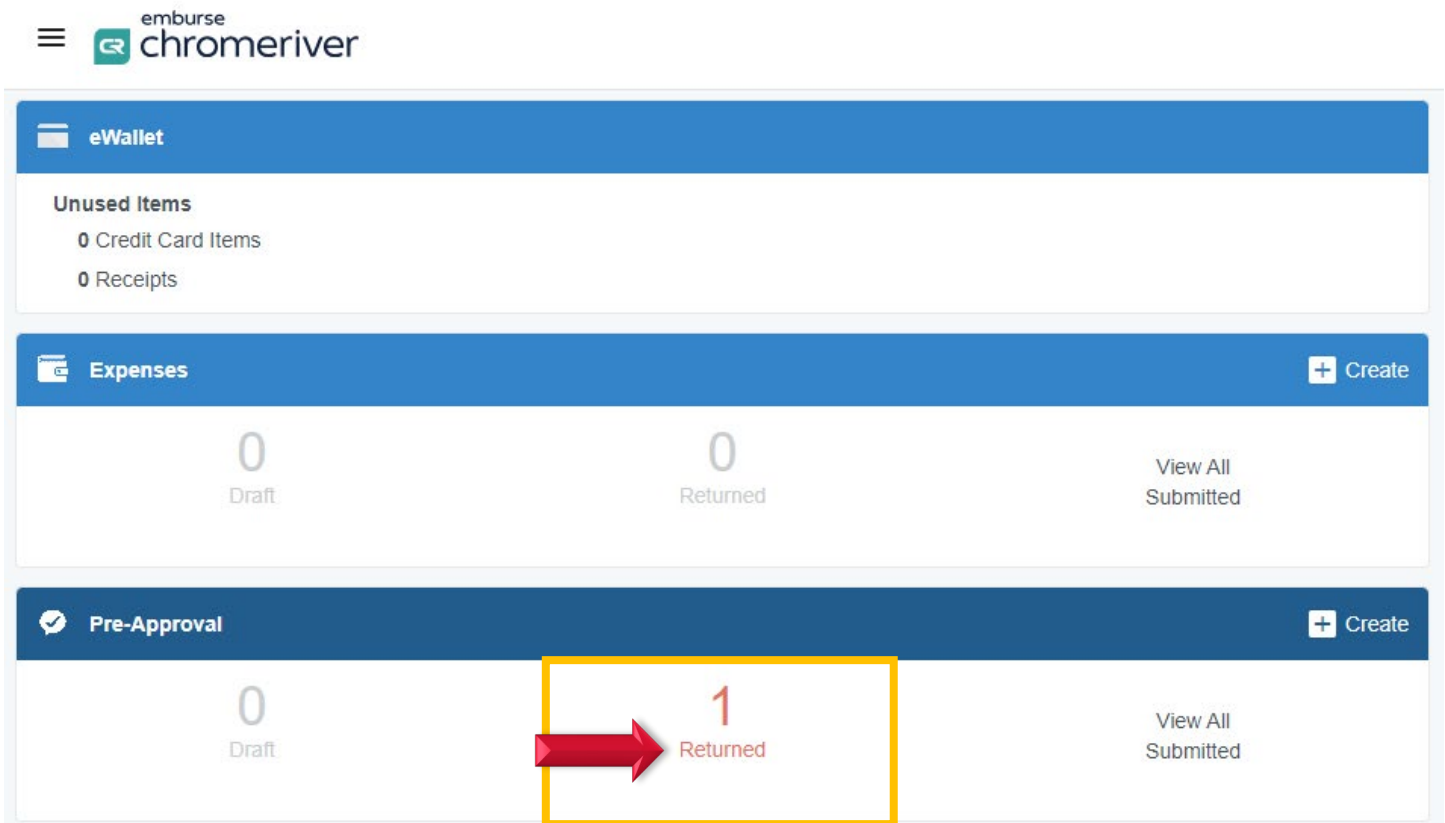


## Editing a Returned Pre-Approval

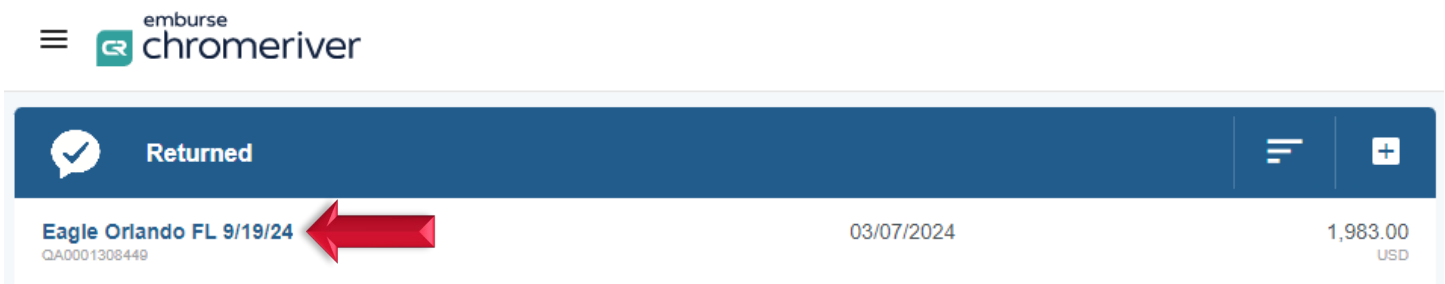
### Step 1: Select the Returned Pre-Approval

In the Pre-Approval ribbon, on the Home Screen, click **Returned**.



The screenshot shows the emburse chromeriver app interface. At the top, there is a navigation menu with a hamburger icon and the text 'emburse chromeriver'. Below this, there are three main sections: 'eWallet', 'Expenses', and 'Pre-Approval'. The 'Pre-Approval' section is highlighted with a yellow border. It shows a 'Draft' count of 0 and a 'Returned' count of 1. A red arrow points from the 'Returned' count to the right. To the right of the counts is a 'View All Submitted' link. A '+ Create' button is visible in the top right corner of the 'Pre-Approval' section.

Select the Pre-Approval that was returned.



The screenshot shows the emburse chromeriver app interface with the 'Returned' filter selected in the Pre-Approval section. The 'Returned' filter is highlighted with a blue bar. Below this, there is a list of items. The first item is 'Eagle Orlando FL 9/19/24' with a red arrow pointing to it. To the right of the item name is the date '03/07/2024' and the amount '1,983.00 USD'. A '+ Create' button is visible in the top right corner of the 'Returned' section.

## Step 2: Edit the Returned Pre-Approval

The Pre-Approval Header will appear to the right. Click **Open**.

Open
Delete
PDF ▾

Submit

### Eagle Orlando FL 9/19/24

Report Owner	Archibald Eagle
Created By	Patricia Tieken
Create Date	03/07/2024
Pay Me Amount	1,983.00 USD
PA Report ID	QA0001308449
From Date	09/19/2024
To Date	09/22/2024
Business Purpose	I am attending the CBA Conference to learn how ZYX Software works for the department.

The Pre-Approval Report screen appears.

On the right-hand side, **Scroll Down** to review the **Comments** section for notes on why the Pre-Approval was returned. These notes will guide you on what needs to be revised before resubmitting the Pre-Approval.

- This could include but is not limited to, [Adding a Pre-Approval Type](#), [Deleting or Editing a Pre-Approval Type](#), [Deleting/Adding Fund Orgs](#), [Adding Comments](#), and/or [Adding Attachments](#).

emburse chromeriver
Archibald Eagle ▾  
University of Southern Indiana

← Pre-Approvals For Archibald Eagle
+

#### Eagle Orlando FL 9/19/24

1 Comments | 0 Attachments

EXPENSE	ESTIMATED
Airfare	650.00 USD
Baggage Fee	80.00 USD
Lodging	800.00 USD
Registration Fee	275.00 USD
Taxi / Ride Share	50.00 USD
Meals - Per Diem	32.00 USD
Meals - Per Diem	32.00 USD
Meals - Per Diem	32.00 USD
Meals - Per Diem	32.00 USD

PDF ▾ Images
Delete
Edit

#### Pre-Approvals For Archibald Eagle

Report name should be traveler's last name, destination (city, state or city, country) and trip departure date

Start Date: 09/19/2024

End Date: 09/22/2024

Number of Days: 4

Pay Me In: USD - US Dollars

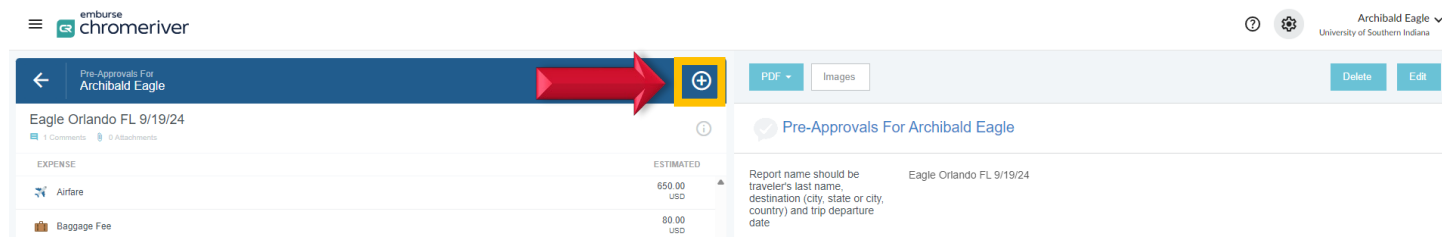
Business Purpose: I am attending the CBA Conference to learn how ZYX Software works for the department.

Request Type: Employee Travel

Travel Type: Employee Travel Out of State

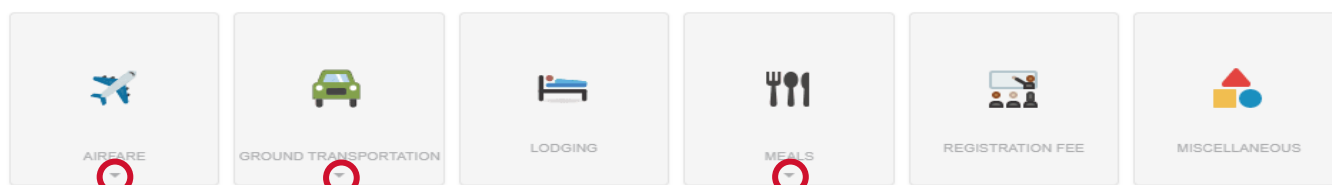
## Add a Pre-Approval Type

On the left-hand side of the Pre-Approval Report, click on the white circle with a white plus sign inside it (inside the dark-blue ribbon).



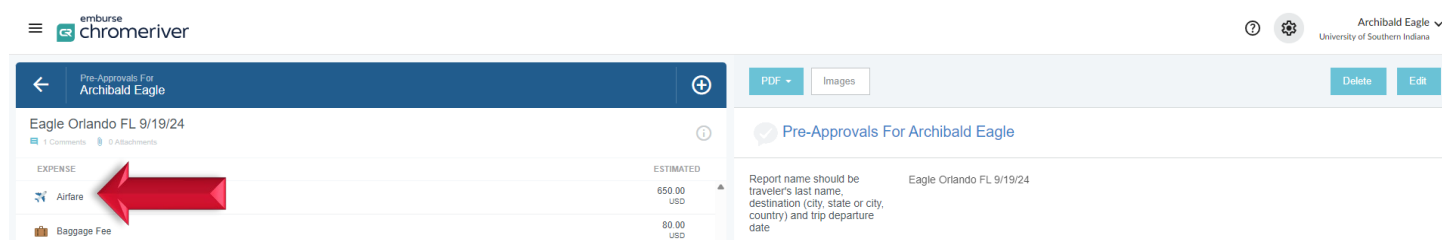
There are six Pre-Approval types. To add a Pre-Approval type, click a tile and enter the required information.

- Tiles with a gray triangle (circled in red) indicate additional options within those tiles. To see those selections, click the tile.



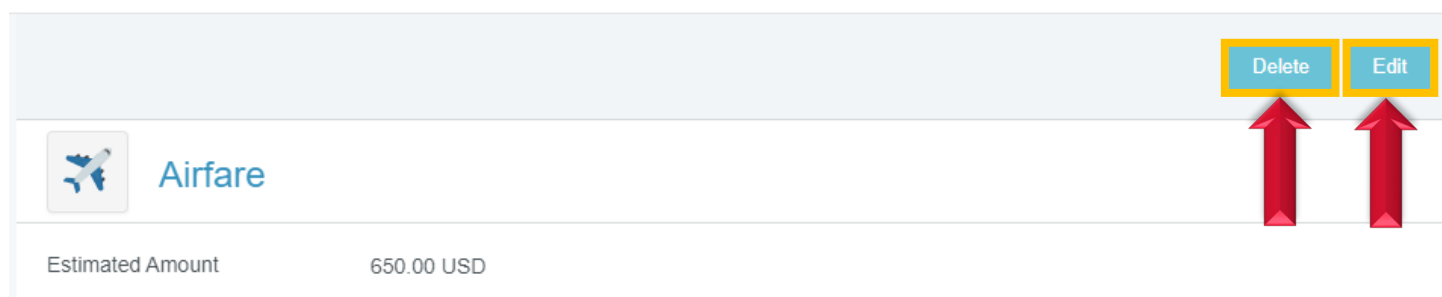
## Delete or Edit a Pre-Approval Type

Click the Pre-Approval type from the left-hand side.



**Delete** will remove the Pre-Approval type, and **Edit** will allow changes to the Pre-Approval type.

- View the guide [Deleting a Pre-Approval](#) to delete a whole Pre-Approval.



## Delete/Add Fund Org

To delete or add a Fund Org, click the **Edit** button in the upper right-hand corner of the Pre-Approval Report. Then, **scroll down** to the **Allocations** section.

To delete a Fund Org, click the “**x**” next to the Fund Org.

To add a Fund Org, click **Add Allocation**.

Allocations			
		Split Equally	Clear Splits
		01330 U-10001-01330-1100 Economics and Marketing	37.41 %    538.00    ◀
	x	01300 U-10001-01300-1300 Romain College of Business	27.82 %    400.00    ◀
	x	18017 U-18017-01000-1300 Provost Faculty Development Travel	34.77 %    500.00    ◀
		<b>100.00 %</b>	<b>1,438.00</b>

+ Add Allocation

Continue to delete or add Fund Org as needed. Then, review the dollar amounts listed for each Org to ensure they are correct. If needed, then adjust the dollar amounts (last column) from the first listed Org to the last (top-down).

- Example: If you receive \$400 from Dept (1), \$600 from College (2), and \$500 from Provost (3), then manually type each of the respective amounts in the appropriate dollar column (last column).
  - Ignore the percentages column (middle column)

Allocations			
		Split Equally	Clear Splits
x	01330 U-10001-01330-1100 Economics and Marketing		538.00    ◀
x	01300 U-10001-01300-1300 Romain College of Business		400.00    ◀
x	18017 U-18017-01000-1300 Provost Faculty Development Travel		500.00    ◀
		<b>100.00 %</b>	<b>1,438.00</b>

After the necessary edits have been made, click **Save**.

Cancel Save

Are you being compensated/reimbursed for any part of this trip from outside of USI fund/orgn?

---

**Allocations**

Split Equally
Clear Splits

×	01330 U-10001-01330-1100 Economics and Marketing	37.41 %	538.00	◀
×	01300 U-10001-01300-1300 Romain College of Business	27.82 %	400.00	◀
×	18017 U-18017-01000-1300 Provost Faculty Development Travel	34.77 %	500.00	◀
		100.00 %	1,438.00	



### Add Comments

To add Comments, scroll down inside the Pre-Approval Report (right-hand side) until the **Comments** section is in view.

- If the Pre-Approval Report is not visible, then click the Report Description on the left.

←
Pre-Approvals For Archibald Eagle
+

Eagle Orlando FL 9/19/24 

1 Comments 0 Attachments

### Comments

Use this area to:

- Enter web link for conference/event information, if applicable.
- Provide other travelers' names or number of travelers, especially if traveling with students.
- Communicate information to supervisor, chair, dean, etc.
- Provide other information that may be helpful.

### Important:

- Comments are visible to **ALL** who can access the Pre-Approval report and will appear on the approval email notifications. They are also permanent and once posted, they cannot be deleted.

## Add Attachments

To add Attachments, scroll down inside the Pre-Approval Report (right-hand side) until the **Attachments** section is in view.

- If the Pre-Approval Report is not visible, then click the **Report Description** on the left side (see the above screenshot in the **Add Comments** section).

## Attachments

Use this area to upload:

- Conference schedule, research trip itinerary, recruitment travel agenda, letter of invitation, etc.
- Documents for internal communication, such as class coverage schedule.

*Note:*

- Chrome River can only attach documents in the following formats: PDF, PNG, and JPEG.
- Documents can be dragged to the elected area or added via the **Upload Attachments** button.
- Attachments may only be removed if deleted **BEFORE** submitting the Pre-Approval report.
  - *Tip:* Click the file in the Attachments section to remove an attachment. A window will appear on the left, showing the document. Find and click the red trashcan in the upper left-hand corner to delete it.

## Step 3: Resubmit the Pre-Approval

Click **Submit**.

EXPENSE	ESTIMATED
Airfare	650.00 USD
Baggage Fee	80.00 USD
Lodging	800.00 USD
Registration Fee	275.00 USD
Taxi / Ride Share	50.00 USD
Meals - Per Diem	32.00 USD
Meals - Per Diem	32.00 USD
Meals - Per Diem	32.00 USD
Meals - Per Diem	32.00 USD

Report name should be traveler's last name, destination (city, state or city, country) and trip departure date		Eagle Orlando FL 9/19/24
Start Date		09/19/2024
End Date		09/22/2024
Number of Days		4
Pay Me In		USD - US Dollars
Business Purpose		I am attending the CBA Conference to learn how ZYX Software works for the department.
Request Type		Employee Travel
Travel Type		Employee Travel Out of State
Primary Reason for Travel		Attendee/Participant
This trip needs an activity code. Faculty need to click the button and add department	<input type="checkbox"/>	
Is there personal time included in this trip?		No
Are you being compensated/reimbursed for any part of this trip from		No


# CHROME RIVER USER GUIDE

An opportunity will be given to perform a final review of all the Pre-Approval trip information.

After the final review, click **Submit**.

Submit Preapproval

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



## Eagle Orlando FL 9/19/24

Report Owner

Archibald Eagle

If the report was resubmitted successfully, then the message below will briefly appear at the top of the screen.

- View the guide [Tracking a Pre-Approval](#) to view the Pre-Approval's current approval status.

