Chrome River Quick Guide: Pre-Approval Report

1. In Bengal Web, click on the Chrome River travel channel link.
2. Log into Chrome River.
3. From the Dashboard, in the upper right corner, click the + NEW button.
4. From the drop down menu, select New Pre-Approval Report.

**NOTE:** Pre-Approvals are estimates of the total expenditures for the trip, and are used to encumber funds and obtain trip approval from all required approvers.

5. Enter the following:
   a. Report Name. Identify the trip being taken.
   b. Start and End Date(s).
   c. Number of Days. This will automatically be determined by Start/End Date(s).
   d. Pay Me In. This is automatically pre-determined.
   e. Business Purpose. The business-related reason for the expenditures. How does it relate to your job duties? How does it benefit the department and University?
   f. Report Type
      i. Individual Travel
      ii. Group Student Travel
      iii. Athletic Travel
      iv. Field Trip
   g. Departure City/State
   h. Destination City/State
   i. Check the Travel Card box *only* if you will be using a travel card for any expenditures.
   j. Cash Advance Amount. Refer to the Cash Advance Travel Policy and Procedure.

**NOTE:** If using a travel card, an advance can only be requested for mileage and/or meal per diem, unless the report type is Group Student Travel.

k. ISU Index. As you type, a list will prefill. Use the mouse to scroll down and left click to select the index where funds are to be encumbered.

l. From the drop down menu, select the type of travel.
   i. In State
   ii. Out of State
   iii. Out of Country

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iv. In State Same Day Travel  
v. Out of State Same Day Travel  
vi. Non-Travel Expenses  

6. Click **Save** in the upper right corner.

![Image of a form titled Pre-Approvals For Melissa Myers]

- **Report Name**
- **Start Date**
- **End Date**
- **Number of Days**
- **Pay Me In**: USD - US Dollars
- **Business Purpose**
- **Report Type**: -- Select --
- **Departure City/State**
- **Destination City/State**
- **Travel Card**
- **Cash Advance Amount**: 0

**ISU Indexes**

Search for ISU Index

7. Choose from the major category list of Pre-Approval icons provided and add expenditures. Other expenses can be reimbursed post-trip.

**Add Pre-Approval Types**

- Airfare
- Hotel
- Car Rental
- Mileage
- Registration
- Per Diem
- Per Diem Wizard
- Student Travel/Athletic
- Field Trip
8. Click on the icon, and enter the Estimated Amount and a brief Description with any information/comments that would be helpful for all authorized approvers and Travel Office.

9. Click Save in the upper right corner.

10. Continue to add all expenditures by clicking the + Button on the left screen.

11. When creating Pre-Approvals for Group Student, Athletic, and Field Trip, choose either the Student Travel/Athletic or Field Trip icon. You may lump the entire trip expenditures together in the Estimated Amount.

**NOTE:** Expenses will need to be itemized for reimbursement post-trip.

- Mileage. Estimate the total round-trip mileage and multiply it by the current Federal Rate. Enter the dollar amount, and list the calculation breakdown in the Description.
- Per Diem. These will automatically be calculated based on the Destination and # of travel days based on the Travel policy.
i. A Per Diem and Per Diem Wizard icon is available based on the type of travel.
ii. The Per Diem Wizard icon allows you to enter and adjust meals for multiple days simultaneously.

c. For meals, enter the following:
   i. Start/End Date(s).
   ii. Times, in military.
   iii. Days. This will automatically be determined by Start/End Date(s).
   iv. Description. Add any information/comments that would be helpful for all authorized approvers and Travel Office. What meals will be provided?
   v. Location. As you type, a list will prefill. Use the mouse to scroll down and left click to select the Location.
d. Click **Add Entries** at the bottom.
e. A list of all the meals will appear on the right side. Click on the day(s) and check which meals you **do not** need and it will be reduced from per diem. When finished, click **Add to Report**.

12. When all information and estimated expenditures have been added, click **Submit** at the bottom.

13. An overview of the trip and information will appear on the right side. Scroll down and review the information for accuracy, enter comments, and/or upload attachments.

**NOTE**: Attachments are not required for a Pre-Approval, only for the Expense Report, unless an advance is needed more than 60 days before the departure date. For assistance, please contact the Travel Office.
14. To upload attachments, you can drag and drop or Browse File to Attach. Only JPG, PDF, PNG, and TIFF files of up to 5MB can be accepted.

15. Click **Submit** in the upper right corner.

16. If there are any issues with the report, warnings and violations will be given and will need to be corrected before submitting for approval.
   
   a. Warnings indicate that additional information is required before submitting the report for approval. Respond by either modifying the data or replying to the warning.
      
      i. If a reply is required, tap **Enter Response** in the message bar and enter a reply.
      
      ii. Enter **Save** to update and close warning message.
b. Violations indicate that the expense cannot be submitted for approval based on the Travel policies and will need to be corrected before submitting for approval.
   i. If an error occurs, the **Submit** button will be deactivated and you will be required to make any necessary changes before continuing.