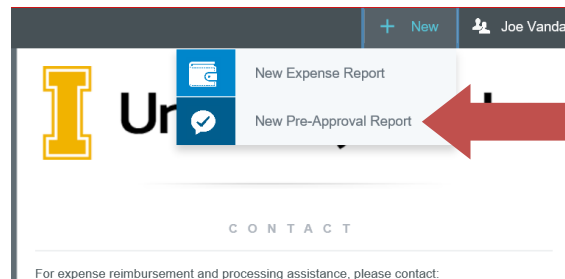


CNR: Chrome River Quick Guide: Pre-Approval Report

University of Idaho

1. Access Chrome River by going to <https://support.uidaho.edu/TDClient/Requests/ServiceDet?ID=707> and selecting Chrome River icon.
2. Log into Chrome River.
3. From the Dashboard, in the upper right corner, click the + NEW.
4. From the drop down menu, select New Pre-Approval Report.

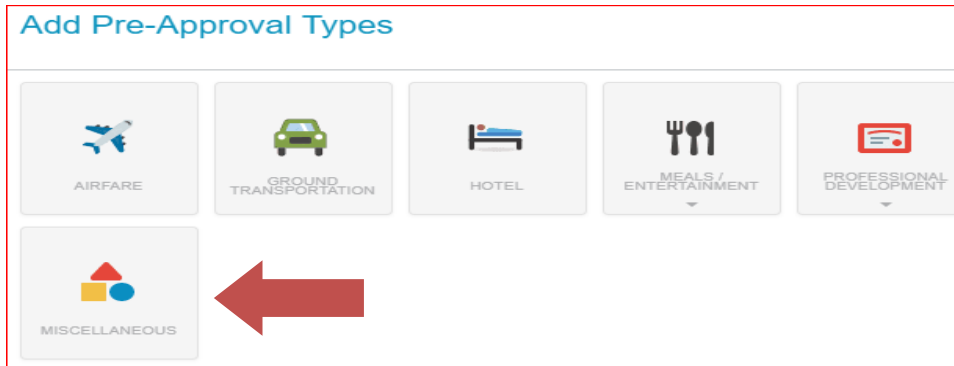
NOTE: Pre-Approvals are estimates of the total expenditures for the trip that are used to obtain trip approval from all required approvers.



**At this time CNR Fiscal is not allowing employees to submit their own expense claims, only pre-approvals. Contact CNR Fiscal with questions.*

5. Enter the following:
 - a. Report Name: Naming convention:
 - i. "TR PA_Last Name_First Initial_Location_Date"
45 character limit
e.g. TR PA Cai, L MOSS-trning 10-31-19
 - ii. **NOTE:** blankets are only valid for 90 days
 - b. **Start and End Dates.**
 - i. Number of Days. This will automatically be determined by Start/End Date(s).
 - c. Pay Me In: This is automatically pre-determined.
 - d. **Business Purpose:** The business-related reason for the expenditures. How does it relate to your job duties?
 - e. From the drop down menu, select the **type of travel.**
 - i. In State (**at least 1 week in advance*)
 - ii. Out of State (**at least 1 week in advance*)
 - iii. International (**must be minimum 1 month in advance*)
 - iv. Non-Travel Expense (**Not an option for PA*)
 - f. **Not Necessary to enter Depart / Arrive Time**
 - g. **Destination City/State: Must Include; not optional**
 - h. **GL Approver-Grant funded: Jen Meekhof, Non Grant: Tom Zimmer**
 - i. For CNR this is ALWAYS a fiscal person
 - ii. NEVER your supervisor
 - i. **Alcohol Box:** Check with CNR Fiscal
 - j. **Cash Advance Amount:** Do no use w/o CNR Fiscal Prior Approval
 - k. **Banner Index:** once inserted there will be 1-2 drop down type in:
 - i. Use default Activity Code from Index
 - ii. Use default Location code from Index

7. **Choose Miscellaneous tile from the expenses:** Enter the total estimated dollar amount you think this trip might cost (including per diem for each day, hotel, airfare, public transportation, rental car, gas, etc.) plus approximately 30% of the total.



8. Click **Save** in the upper right corner.
9. When creating Pre-Approvals for a Group of Students (i.e. Non-employee; employees need to submit their own PA), Athletic, and Field Trip, you may lump the entire trip expenditures together in the Estimated Amount.
- Add class number as a reference and let CNR Fiscal know if you are a TA or Faculty
10. Click Submit in the upper right corner.
- OTHER:**
All employees need to cover their own travel expenses, including all IH and graduate students on payroll. Please contact CNR Fiscal for help with specific situations.
 - If the expense report is not submitted after 30 days of the travel transaction you will be receiving automatic reminders in your email.
 - ****If traveling on a non-CNR Index, the home college financial person for that index will have to be the GL approver for that trip.

Example of a completed PA form

Report Name: TR PA Vandalheimer J SAF KY 11-3-2019

Start Date: 10/29/2019

End Date: 11/03/2019

Number of Days: 6

Pay Me In: USD - US Dollars

Business Purpose: Vandalheimer J traveling to Society for American Foresters to present research paper and collaborate with colleagues.

Travel Type: Out of State

Depart Time (Optional): -- Select --

Arrival Time (Optional): -- Select --

Out of State Destination (Optional): Louisville, KY

Add Another Location:

GL Approver: ~~Riser, Shilly (V00710519)~~ Grant funds: Jen Meekhof; Non-Grant funds: Tom Zimmer

Alcohol:

Cash Advance Amount (Optional): 0 **Do not use Cash Advance w/o consulting w/ CNRFiscal first**

Please type the <Banner Index> you would like to search for in the Banner Index box below. As you type, a drop down list of matching items will be displayed for selection

Banner Index

677995-210664 677-01UNA-- CNR Unrestricted Gifts **please use your specific index number here*

Use default Activity Code from Index **type in "Default" and "Use default Activity Code from Index" will appear. For Mac/Stennis index, use your specific activity code.*

Use default Location Code from Index **type in "Default" and "Use default Location Code from Index" will appear.*

[+ Add Banner Index](#)