

Chrome River: Allocations and Project Codes for External User

When the first expense is added to an expense report, the Allocation and Project Code are selected

How to select the Allocation

- After adding an expense to a report and entering the expense information (date, amount, etc.), towards the bottom of the screen, is the Allocation field
 - Allocation is the Meeting the expense(s) will be charged to
- Click into the Allocation field
- Begin to type either the
 - Meeting Number, or
 - Meeting Name
- A list of options or the specific Meeting will appear
- Click on the appropriate Meeting
 - 1 Executive (Pre-Approved Funded Travel)
 - Use for any Pre-Approved Funded Travel not listed below
 - 3 Finance Grant/Funds Finance (Pre-Approved Zone/Grant Travel)
 - 19 Committee Assignment Meeting
 - 21 Spring Natl Meeting
 - 22 Summer Natl Meeting
 - 23 Fall Natl Meeting
 - 24 Insurance Summit
 - 26 Commissioner's Conference
 - 27 Commissioner Fly-In
 - 28 Commissioner Roundtable
 - 29 International Insurance Forum
 - 72 Financial Regulatory Services
- The Allocation selected will automatically populate on additional expenses added to the report

The screenshot shows a form for an expense report titled "Parking". The form includes the following fields:

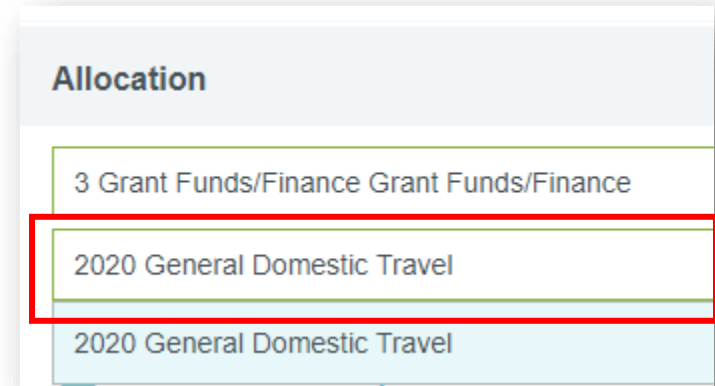
- Date:** 11/23/2020
- Spent:** 0.00 USD
- Business Purpose:** Parking At KCI
- Description (Optional):** (Empty text area)
- Is this a Pre-Paid Item?:**
- Allocation:** 3 Grant Funds/Finance Grant Funds/Finance (highlighted with a red box)

A blue tooltip message is visible above the Allocation field, stating: "Please type the <CUSTOMER ALLOCATION DESCRIPTION> you type, a drop down list of matching items will be displayed for selecti".

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How to select the Project Code

- Once the Allocation is selected, a field under Allocation will display
- Click into the field
- A drop-down list with Project Codes will populate
- Select the appropriate Project Code for the expense by
 - Typing the name of the Project Code, or
 - Scrolling through the list of options
 - Selecte the Project Code that corrsponds with the Meeting
 - All Commissioners DC Fly-In
 - Commissioners Conference
 - Committee Assignment Mtg
 - Disaster Relief
 - Fall National Meeting
 - Insurance Summit
 - Interim Exec Comm Mtg-Mid Year Updt
 - International Fellows
 - Intl Forum, DC
 - MAWG Meeting
 - NIPR Travel/Exp
 - Spring National Meeting
 - Summer National Meeting
 - US Asia Pacific Forum
 - For travel or expenses not related to a specific Meeting listed above, select
 - “General Domestic Travel” for domestic travel or expenses, or
 - “General International Travel” for international travel or expenses
- The Project Code selected will automatically populate on additional expenses added to the report



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How to change the Allocation or Project Code

- Click into the Allocation field and select another Meeting Name/Number using the instructions above
- Click into the Project Code field and select another Project Code using the instructions above