CREATE A PRE-APPROVAL REPORT - CANDIDATE

Candidate Pre-Approval Report

To create a Pre-Approval Report, click the **NEW** button in the upper right corner and select **New Pre-Approval Report** from the drop-down menu.

The Pre-Approval header screen will appear.
Chrome River User Manual

Pre-Approvals For Wu Shock

1. Report Name
2. Departure Date: 06/19/2019
3. Return Date: 06/19/2019
4. Number of Days: 1
5. Business Purpose: Optional
6. Traveler Type: Candidate
7. Candidate Information: Name/Street Address/City/State/Zip
8. WSU Position Number/Position Title
9. Division Routing: -- Select --
10. Department: -- Select --
11. Will there be personal time during this trip?
12. Funding: Search for Funding
13. -- Select --
Enter the Header data:

1. **Report Name:** This is the name assigned by the expense creator, which is used in tracking and inquiry to help identify expense reports. Naming Convention: Candidate Last Name, Candidate First Name, Dates of Travel
2. **Departure Date:** Click the calendar icon to select the date which represents the anticipated departure date for this travel event.
3. **Return Date:** Click the calendar icon to select the date which represents the anticipated return date for this travel event.
4. **Number of Days:** This field will populate based on the Departure/Return dates entered.
5. **Business Purpose:** Enter a clear, detailed business purpose for the travel event. The business purpose should explain: (1) what purpose the expenditure served, (2) why the expense was necessary, and (3) how it furthered the University’s goals. See the CR0027 Business Purpose document for more detailed information.
6. **Traveler Type:** Select Candidate
7. **Candidate Information:** Enter the Name, street address, city, state, and zip code of the candidate.
8. **WSU Position Number / Position Title:** Enter the position number and position title as listed on the search documentation.
9. **Division Routing:** Select the appropriate division routing – if you are not a part of Academic Affairs or Student Affairs, select None.
10. **Department:** Select the appropriate department from the drop-down list.
11. **Will there be personal time during this trip:** Leave the box blank if there will not be personal time included in this travel event. Select the check box if there will be personal time included in this travel event.
12. **Funding:** Select the proper funding for the Pre-Approval Report. Begin typing the Fund, Org, or Department Name, and select the appropriate value once it appears below the box you are typing in.
13. **--Select--:** Select the value 0000-Pre-Approval from the drop down list.

If you have more than one funding string for the Pre-Approval, click **Add Funding** to add additional funding lines.

Click **Save** at the top right side of the screen to continue.
### Pre-Approvals For Wu Shock

- **Report Name**: Pre-Approval Report Demonstration - Candidate
- **Departure Date**: 06/19/2019
- **Return Date**: 06/19/2019
- **Number of Days**: 1
- **Business Purpose**: Pre-Approval Report Demonstration - Candidate
- **Traveler Type**: Candidate
- **Candidate Information**: Joe Smith 1234 E Main St, Jacksonville, FL 32099
- **WSU Position Number / Position Title**: 991234 Director of Operations
- **Division Routing**: None
- **Department**: School of [Redacted]
- **Will there be personal time during this trip?**
- **Funding**:
  - 0000-Pre-Approval
After completing the Pre-Approval Header information, you will be prompted to add the candidate's expenses.

The **Add Pre-Approval Types** screen will slide in from the right.

The expense types are consolidated into categories (expense tiles). Some expense tiles expand to provide additional expense options. Example: **Mileage** is located under **Ground Transportation**.
Select the specific expense tile you want to add to the Pre-Approval. Each expense selected will open in a form and require additional information. For detailed information on each Expense Tile, please see the CR0018 Pre-Approval Expense Tile Detail help document.

All the expense tile forms, with the exception of Mileage, Hotel and Meals, contain the following fields:

1. **Estimated Amount:** Enter the estimated amount for this expense type.
2. **Description:** Provide any additional information about this expense. This field is optional for most expense types.
3. **To Be Paid By:** Select the option that best describes the anticipated payment method for the expense. Options include:
   (a) Accounts Payable Invoice
   (b) Foundation Funds
   (c) No Cost to WSU
   (d) Personal Funds
   (e) Procurement Card (WSU issued)

Complete the expense tile form and click **Save** at the top right side of the screen to continue.
The expense will be added to the Pre-Approval Report and will be visible on the left side of the screen.

When you have completed all the entries for the Pre-Approval report, click the **Submit** button located at the bottom of the left side of the screen.
A Submit Preapproval message will appear at the top of the right side of the screen. Once you have read the certification statement, click the Submit button.