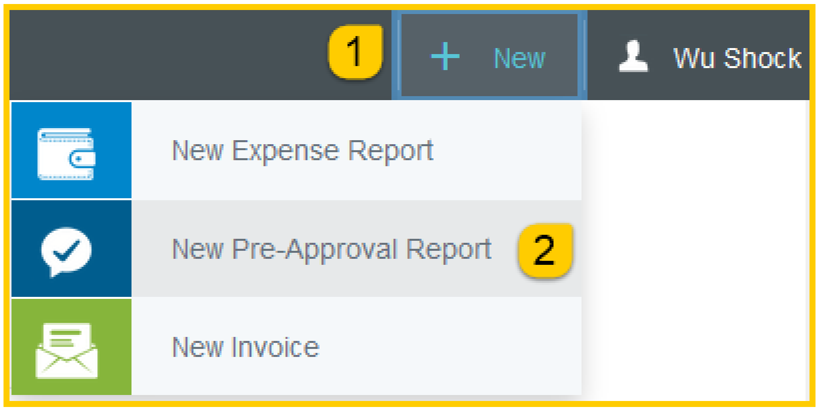
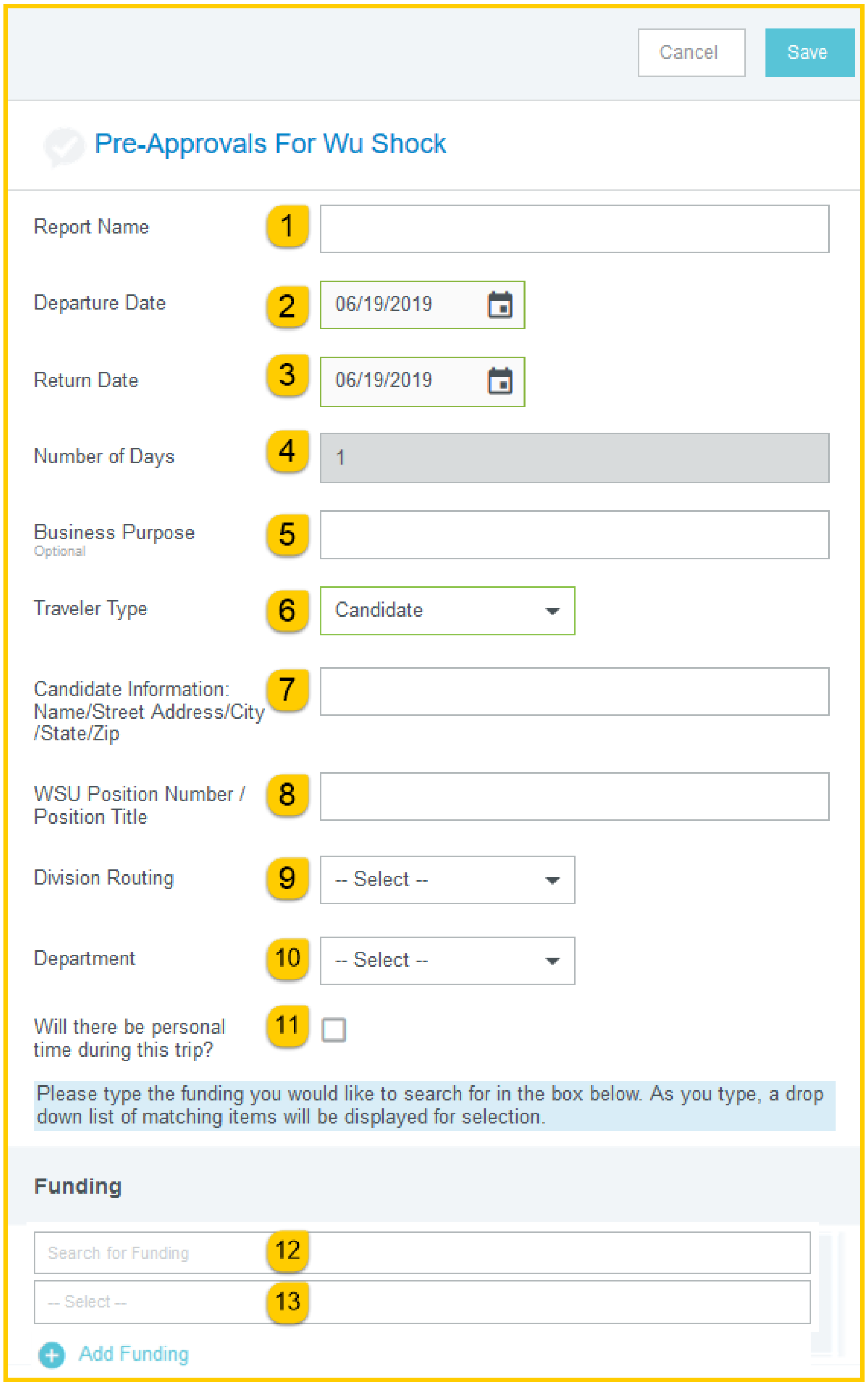
CREATE A PRE-APPROVAL REPORT - CANDIDATE

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.


1
+ New
Wu Shock
New Expense Report
New Pre-Approval Report
2
New Invoice

The Pre-Approval header screen will appear.



Pre-Approvals For Wu Shock

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

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

Funding

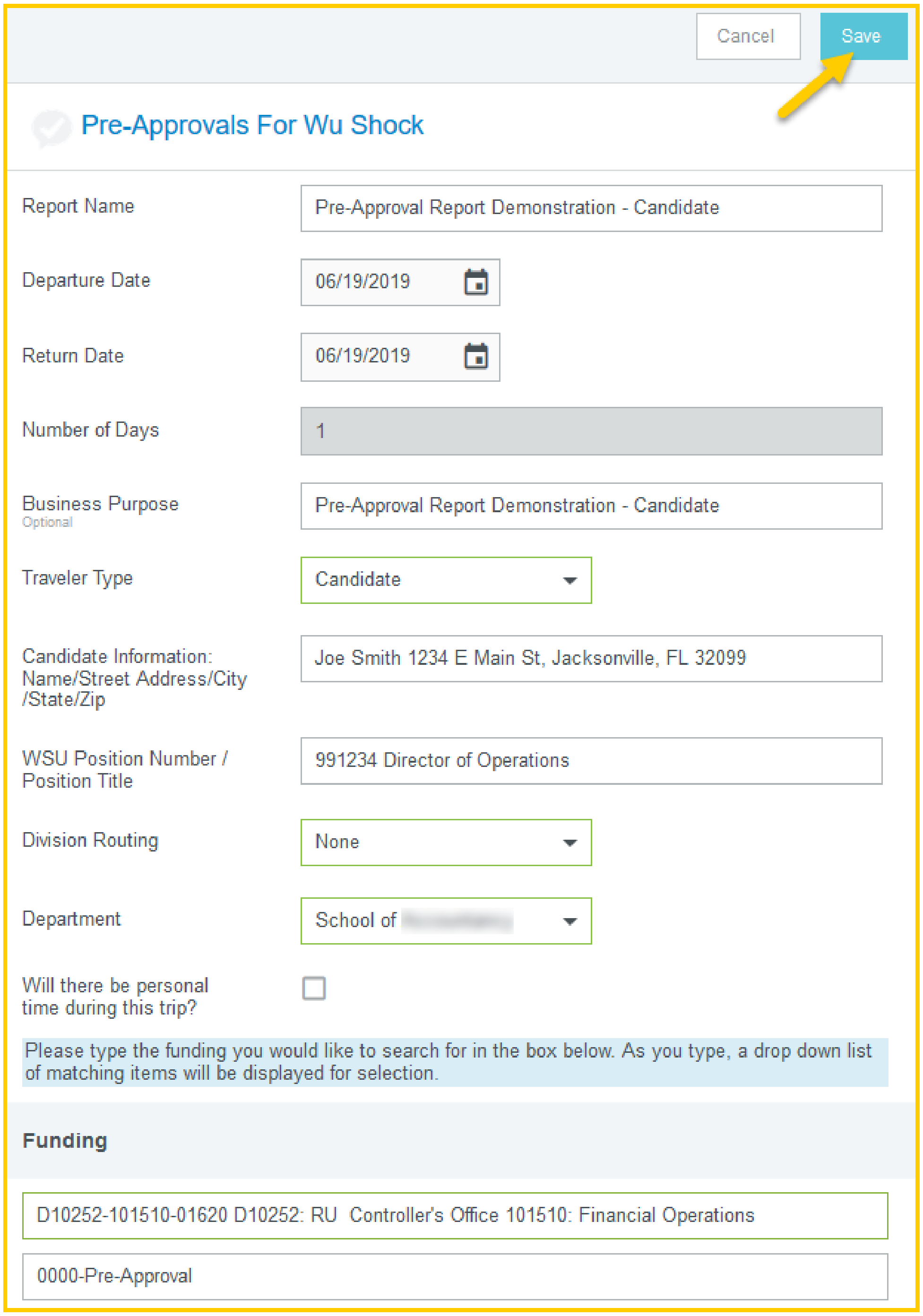
Search for Funding 12
-- Select -- 13

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 Optional	Pre-Approval Report Demonstration - Candidate
Traveler Type	Candidate
Candidate Information: Name/Street Address/City /State/Zip	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?	☐

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

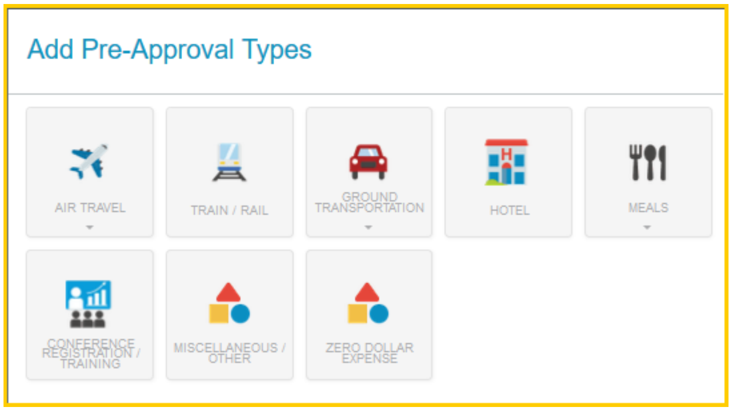
Funding

D10252-101510-01620 D10252: RU Controller's Office 101510: Financial Operations

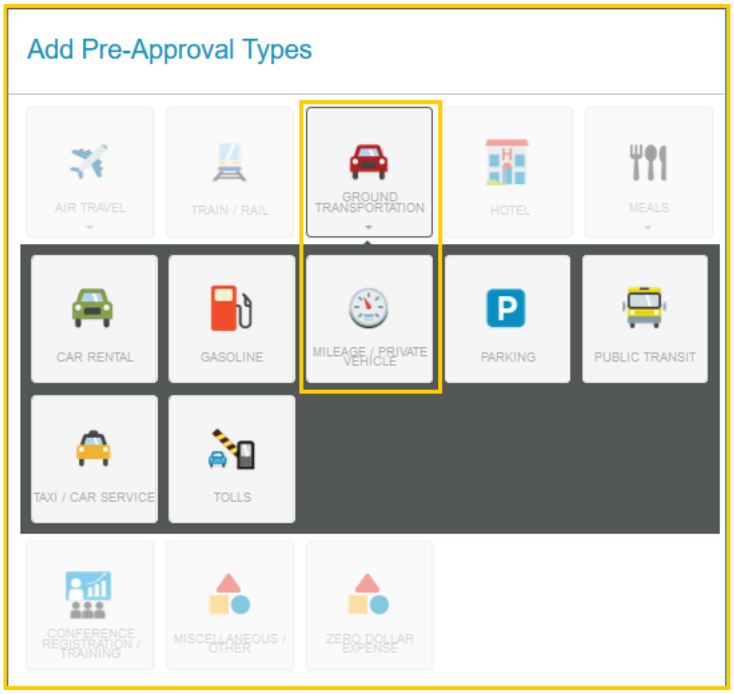
0000-Pre-Approval

After completing the Pre-Approval Header information, you will be prompted to add the candidate's expenses.

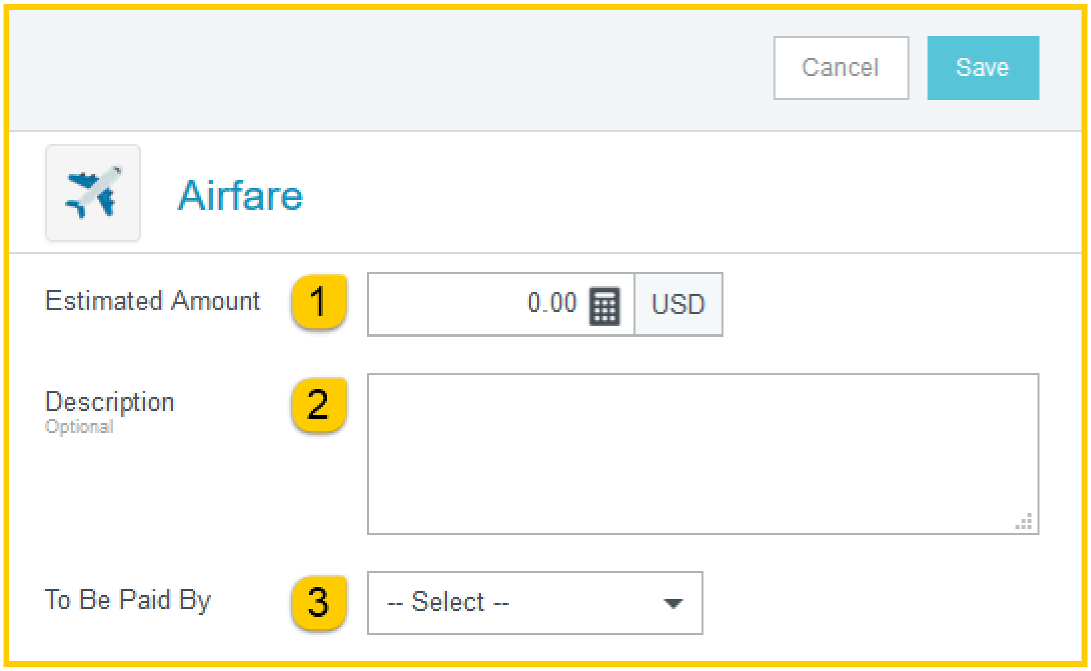
The **Add Pre-Approval Types** screen will slide in from the right.


Add Pre-Approval Types
AIR TRAVEL
TRAIN / RAIL
GROUND TRANSPORTATION
HOTEL
MEALS
CONFERENCE REGISTRATION / TRAINING
MISCELLANEOUS / OTHER
ZERO DOLLAR EXPENSE

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**.


Add Pre-Approval Types
AIR TRAVEL
TRAIN / RAIL
GROUND TRANSPORTATION
HOTEL
MEALS
CAR RENTAL
GASOLINE
MILEAGE / PRIVATE VEHICLE
PARKING
PUBLIC TRANSIT
TAXI / CAR SERVICE
TOLLS
CONFERENCE REGISTRATION / TRAINING
MISCELLANEOUS / OTHER
ZERO DOLLAR EXPENSE

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.



Estimated Amount: 0.00 USD

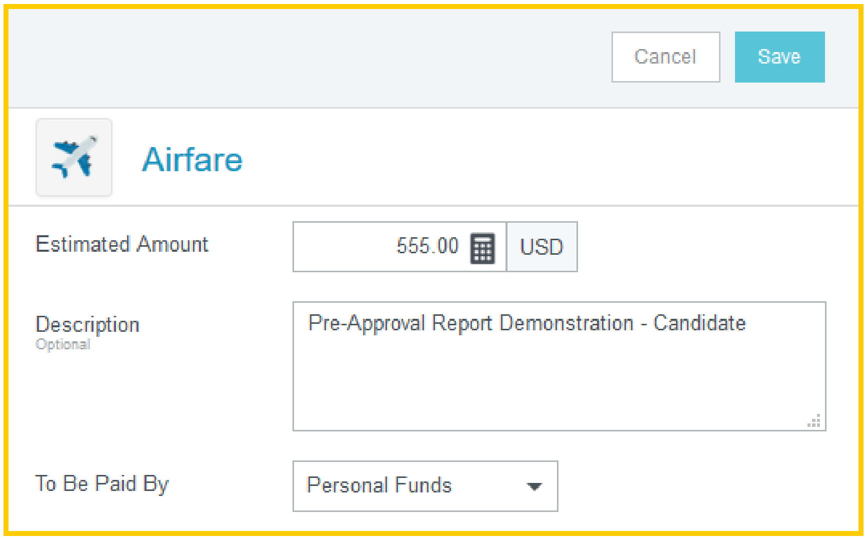
Description Optional:

To Be Paid By: -- Select --

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.


Cancel
Save

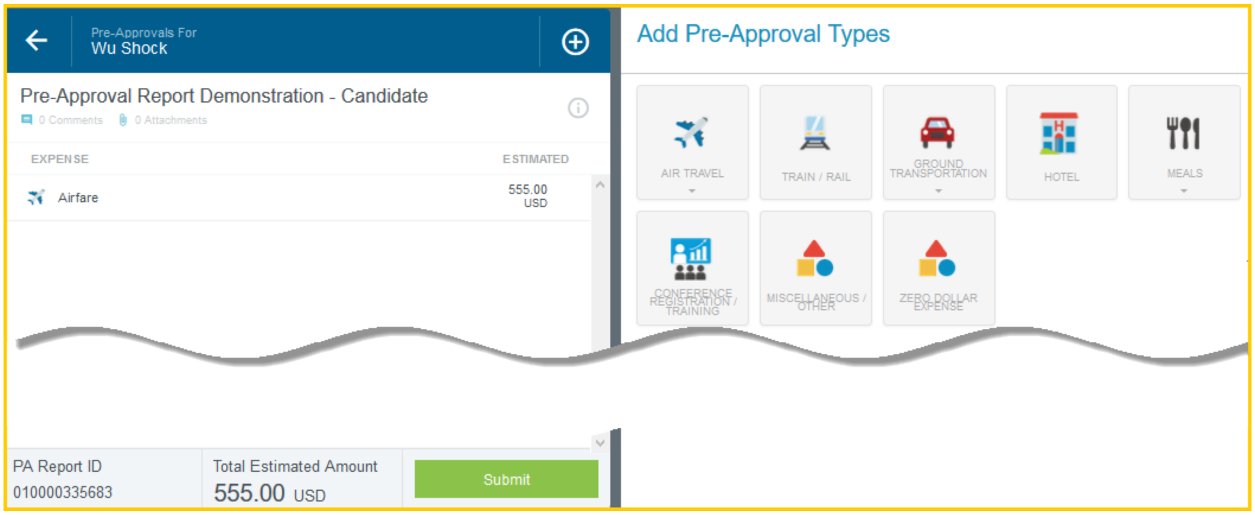
Airfare

Estimated Amount: 555.00 USD

Description (Optional): Pre-Approval Report Demonstration - Candidate

To Be Paid By: Personal Funds

The expense will be added to the Pre-Approval Report and will be visible on the left side of the screen.


Add Pre-Approval Types
AIR TRAVEL
TRAIN / RAIL
GROUND TRANSPORTATION
HOTEL
MEALS
CONFERENCE REGISTRATION / TRAINING
MISCELLANEOUS / OTHER
ZERO DOLLAR EXPENSE
Submit

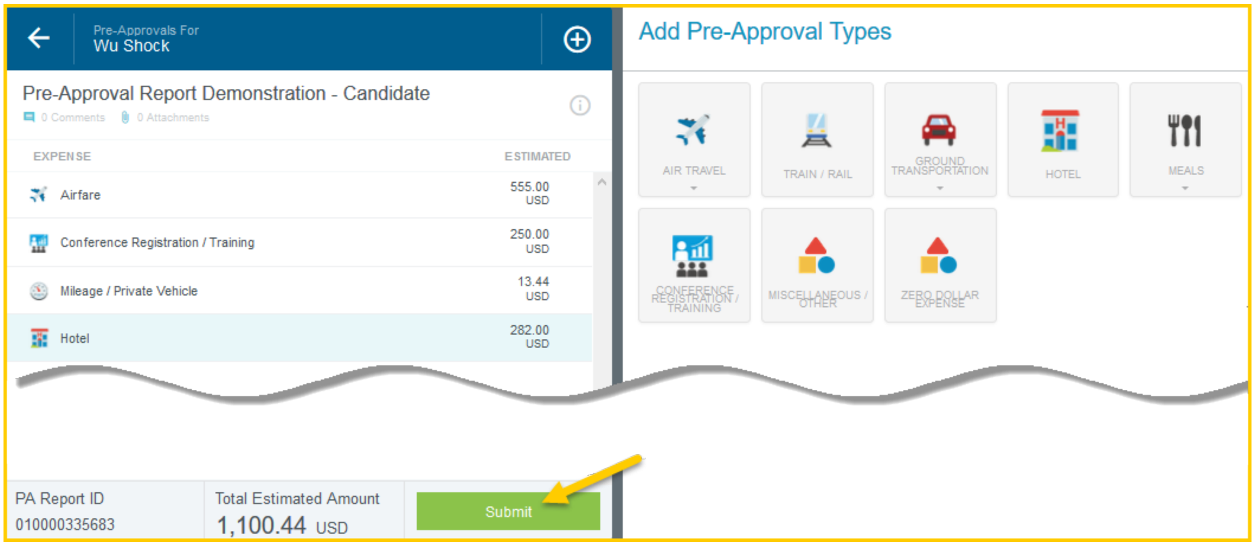
Pre-Approvals For
Wu Shock

Pre-Approval Report Demonstration - Candidate
0 Comments 0 Attachments

EXPENSE	ESTIMATED
Airfare	555.00 USD

PA Report ID	Total Estimated Amount
010000335683	555.00 USD

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.


Pre-Approvals For
Wu Shock
Add Pre-Approval Types
AIR TRAVEL
TRAIN / RAIL
GROUND TRANSPORTATION
HOTEL
MEALS
CONFERENCE REGISTRATION / TRAINING
MISCELLANEOUS / OTHER
ZERO DOLLAR EXPENSE
Submit

Pre-Approval Report Demonstration - Candidate

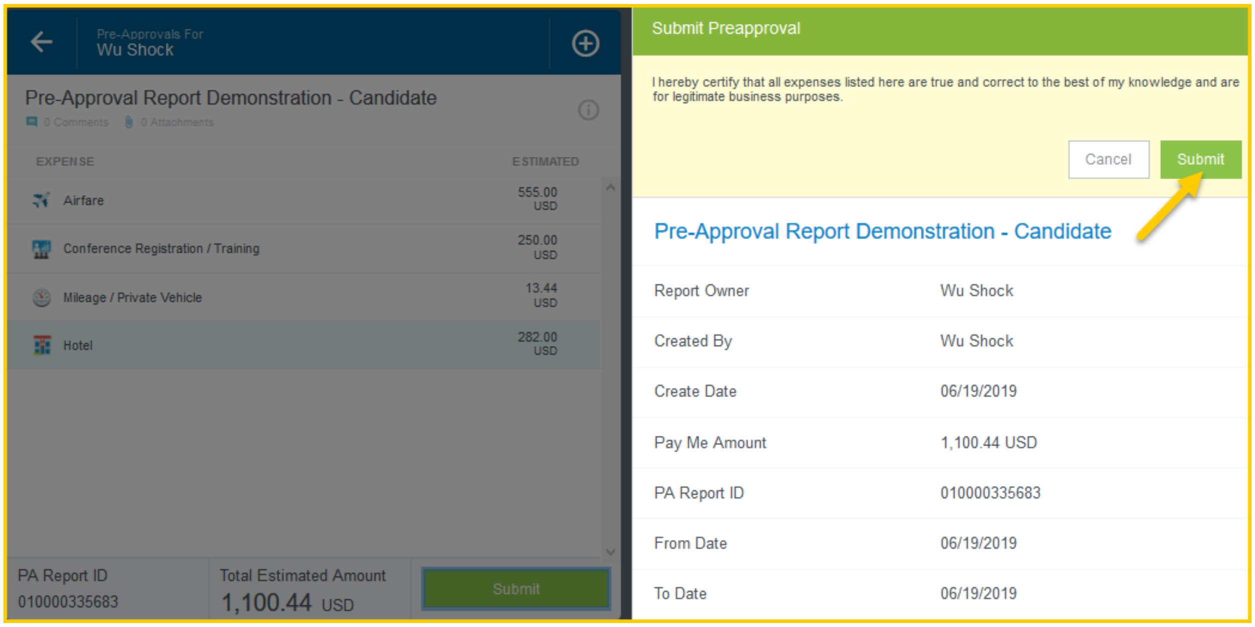
0 Comments 0 Attachments

EXPENSE	ESTIMATED
Airfare	555.00 USD
Conference Registration / Training	250.00 USD
Mileage / Private Vehicle	13.44 USD
Hotel	282.00 USD

PA Report ID 010000335683

Total Estimated Amount 1,100.44 USD

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.


Pre-Approvals For
Wu Shock
Submit Preapproval
Cancel
Submit

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

Pre-Approval Report Demonstration - Candidate

Report Owner	Wu Shock
Created By	Wu Shock
Create Date	06/19/2019
Pay Me Amount	1,100.44 USD
PA Report ID	010000335683
From Date	06/19/2019
To Date	06/19/2019