## Quick Reference

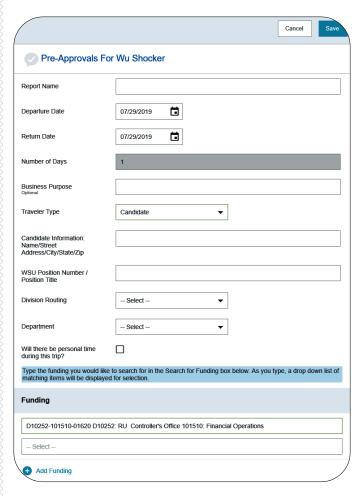
# Create Pre-Approval Report (Candidate)

#### Create New Pre-Approval Report

1. Click the **+CREATE** button in the upper right corner of the Pre-Approval swim lane.



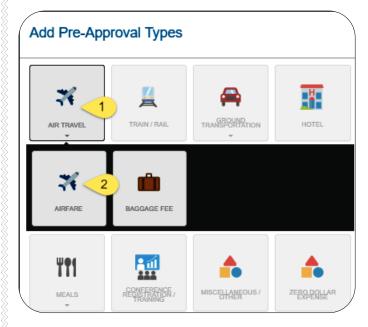
2. Enter the Header data:



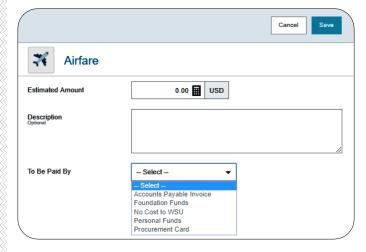
- <u>Report Name:</u> Naming Convention: Candidate Last Name, Candidate First Name, Dates of Travel
- <u>Departure Date:</u> Click the calendar icon to select the date which represents the anticipated departure date for this travel event.
- Return Date: Click the calendar icon to select the date which represents the anticipated return date for this travel event.
- Number of Days: This field is display only
- **Business Purpose:** Enter a clear, detailed business purpose for the travel event.
- Traveler Type: Select Candidate
- <u>Candidate Information:</u> Provide the Name,
   Street Address, City, State, and Zip code of the
   Candidate
- WSU Position Number / Position Title: Enter the position number and position title the candidate is interviewing for.
- **Division Routing:** Select the appropriate item from the drop down. This selection will route the report to the appropriate approver. Select "None" if your department is not a part of Academic Affairs or Student Affairs.
- <u>Department:</u> Select the appropriate department name from the drop down list. If the correct department does not appear in the list, select "Department Not Listed".
- Will there be personal time during this trip:
  This field is not used for candidate travel. The box should remain unselected.
- <u>Funding:</u> Select the proper funding for the expense type.
- <u>-Select-:</u> Tap anywhere in the field labeled -Select- and chose the value 0000-Pre-Approval.
- 3. Click Save at the top right side of the screen to continue.

## Add Expenses

4. Select the specific expense tile you want to add to the Pre-Approval Report

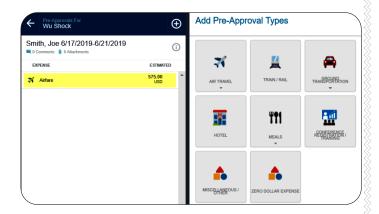


5. Complete the expense tile form and click Save at the top right side of the screen to continue.



- **Estimated Amount:** Enter the estimated amount for this expense type.
- <u>Description:</u> Provide any additional information about this expense. This field is optional for most expense types.

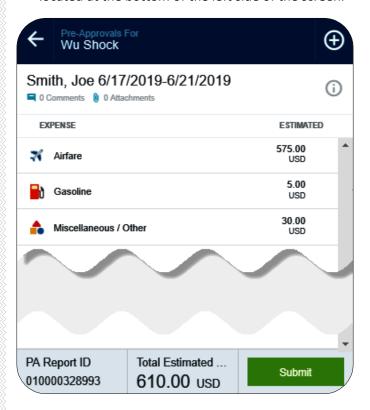
- To Be Paid By: Select the option that best describes the anticipated payment method for the expense.
- 6. The expense will be added to the Pre-Approval Report and will be visible on the left side of the screen. The Add Pre-Approval Types page will appear on the right side of the screen.



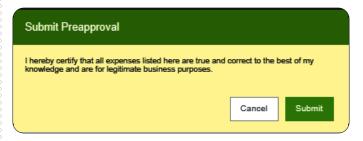
 Continue adding expenses to the report by selecting the appropriate expense tile, completing the expense form, and clicking save at the top right side of the screen.

### Submit

8. 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.



9. A submit confirmation will appear at the top of the right side of the screen.



 <u>Cancel</u>: Clicking cancel allows you to return to the Pre-Approval report to make any needed changes. You can chose to leave the report in draft status.

<u>Submit:</u> Once you have read the certification statement, click the Submit button to submit the Pre-Approval report into workflow for approvals.