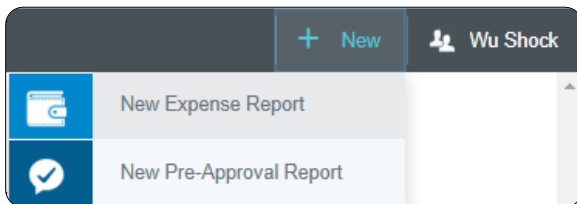


Quick Reference

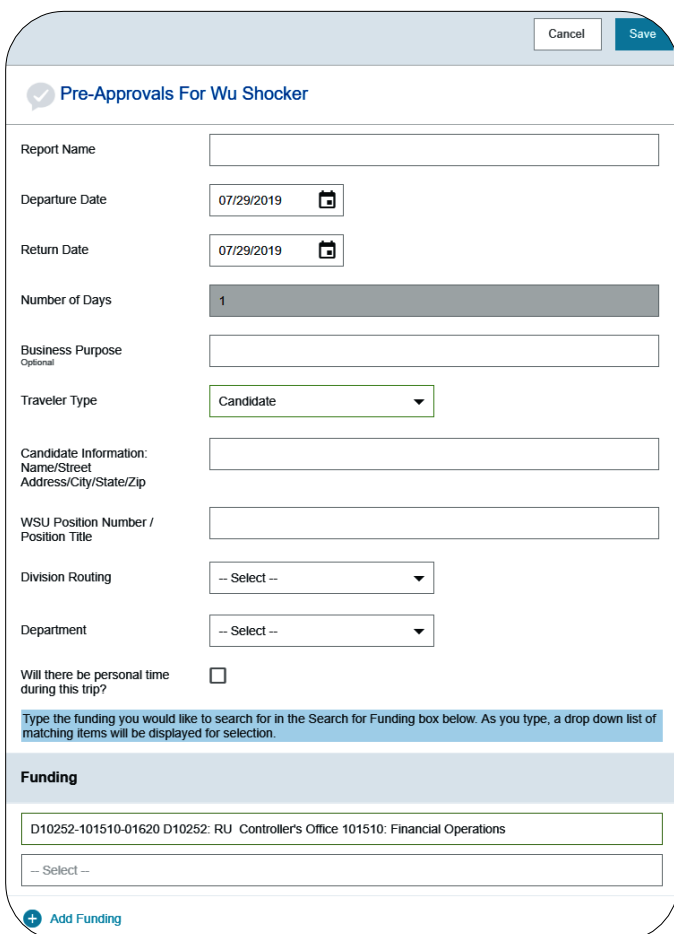
Create Pre-Approval Report (Candidate)

Create New Pre-Approval Report

1. Click the **+NEW** button in the upper right corner and select **New Pre-Approval Report** from the drop-down menu.



2. Enter the Header data:

A screenshot of a web form titled 'Pre-Approvals For Wu Shocker'. The form has a 'Cancel' button and a 'Save' button at the top right. The form fields are: 'Report Name' (empty text box), 'Departure Date' (calendar icon, value: 07/29/2019), 'Return Date' (calendar icon, value: 07/29/2019), 'Number of Days' (value: 1), 'Business Purpose' (Optional, empty text box), 'Traveler Type' (dropdown menu, value: Candidate), 'Candidate Information: Name/Street Address/City/State/Zip' (empty text box), 'WSU Position Number / Position Title' (empty text box), 'Division Routing' (dropdown menu, value: -- Select --), 'Department' (dropdown menu, value: -- Select --), 'Will there be personal time during this trip?' (checkbox, unchecked). Below the form, there is a blue box with text: 'Type the funding you would like to search for in the Search for Funding box below. As you type, a drop down list of matching items will be displayed for selection.' Underneath, there is a 'Funding' section with a text box containing 'D10252-101510-01620 D10252: RU Controller's Office 101510: Financial Operations' and a dropdown menu with value: -- Select --. At the bottom left, there is a '+ Add Funding' button.

- **Report Name:** Naming Convention: Candidate Last Name, Candidate First Name, Dates of Travel
- **Departure Date:** 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
- **Candidate Information:** 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.
- **Department:** 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.
- **Funding:** Select the proper funding for the expense type.
- **-Select-:** 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

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

Add Pre-Approval Types

AIR TRAVEL TRAIN / RAIL GROUND TRANSPORTATION HOTEL

AIRFARE BAGGAGE FEE

MEALS CONFERENCE REGISTRATION / TRAINING MISCELLANEOUS / OTHER ZERO DOLLAR EXPENSE

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

Airfare

Estimated Amount: 0.00 USD

Description (Optional):

To Be Paid By: -- Select --

- Select --
- Accounts Payable Invoice
- Foundation Funds
- No Cost to WSU
- Personal Funds
- Procurement Card

Cancel Save

- Estimated Amount:** Enter the estimated amount for this expense type.
- Description:** 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.

- 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.

Add Pre-Approval Types

Smith, Joe 6/17/2019-6/21/2019

EXPENSE ESTIMATED

Airfare 575.00 USD

AIR TRAVEL TRAIN / RAIL GROUND TRANSPORTATION

HOTEL MEALS CONFERENCE REGISTRATION / TRAINING

MISCELLANEOUS / OTHER ZERO DOLLAR EXPENSE

- 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.

EXPENSE	ESTIMATED
Airfare	575.00 USD
Gasoline	5.00 USD
Miscellaneous / Other	30.00 USD

PA Report ID: 010000328993

Total Estimated ...: 610.00 USD

Submit

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

Submit Preapproval

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

Cancel Submit

- Cancel:** 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.

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