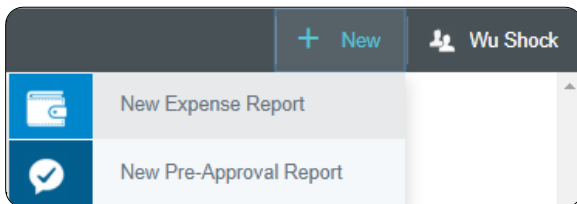


Quick Reference

Create Pre-Approval Report (Employee)

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 mobile application form titled 'Pre-Approvals For Wu Shock'. The form has a 'Cancel' button and a 'Save' button at the top right. The form fields are: 'Report Name' (text input), 'Departure Date' (calendar icon, value: 07/29/2019), 'Return Date' (calendar icon, value: 07/29/2019), 'Number of Days' (text input, value: 1), 'Business Purpose' (text input), 'Traveler Type' (dropdown menu, value: Employee), 'Destination' (dropdown menu, value: -- Select --), 'Travel Type' (dropdown menu, value: International). Below the form fields, there is a blue informational banner: 'Each international travel event requires completion of the International Travel Export Compliance Risk Assessment (access using the link on the Chrome River landing page), prior to making travel arrangements. Contact compliance@wichita.edu or 978-2667 with questions or for assistance.' Below the banner are two dropdown menus: 'Are you a faculty member traveling with students?' (value: -- Select --) and 'Are you attending a Conference?' (value: Yes). Below these is another blue banner: 'Remember to attach a copy of the Agenda/Schedule at a glance when submitting the Expense Report.' Below that is a checkbox for 'Will there be personal time during this trip?' (unchecked). Below the checkbox is another blue banner: '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.' Below the banner is a 'Funding' section with a search input field labeled 'Search for Funding' and an 'Add Funding' button at the bottom left.

- **Report Name:** Naming Convention: Meeting or Conference Name, Dates of Travel
- **Departure Date:** Click the calendar icon to select the date which represents the actual departure date for this travel event.
- **Return Date:** Click the calendar icon to select the date which represents the actual 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 Employee
- **Destination:** Select the Country/State/City you are traveling to.
- **Travel Type:** Select either In State, Out of State or International
- **Are you a faculty member traveling with students:** Select **Yes** if you will be traveling with students; otherwise, select **No**.
- **Are you attending a conference:** Select **Yes** if you are attending a conference. Remember: a conference agenda or schedule at a glance must be attached when submitting the expense report. Select **No** if you will not be attending a conference.
- **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.
- **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

- 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.
- **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.

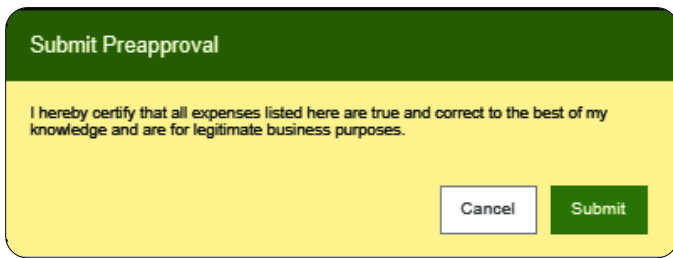
- The expense will be added to the Pre-Approval Report and will be visible on the left side of the screen. The Add Pre-Approval Types page will appear on the right side of the screen.

- 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

- 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.



The image shows a confirmation dialog box titled "Submit Preapproval". The dialog has a dark green header with the title in white. Below the header is a yellow background with a dark green border. The text inside the dialog reads: "I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes." At the bottom right of the dialog, there are two buttons: a white "Cancel" button and a dark green "Submit" button.

- **Cancel:** Clicking cancel allows you to return to the Pre-Approval report to make any needed changes. You can choose 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.