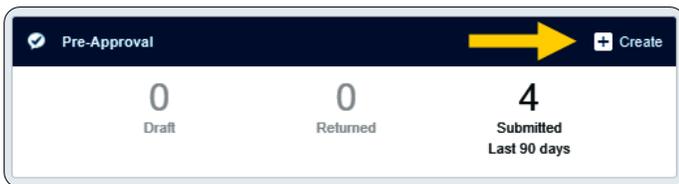


# Quick Reference

## Create Pre-Approval Report (Employee)

### 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:

A screenshot of a 'Pre-Approvals For Wu Shocker' form. The form includes the following fields:

- Report Name: Text input field.
- Departure Date: Date picker showing 07/29/2019.
- Return Date: Date picker showing 07/29/2019.
- Number of Days: Text input field showing 1.
- Business Purpose: Text input field.
- Traveler Type: Dropdown menu showing Employee.
- Destination: Dropdown menu showing -- Select --.
- Travel Type: Dropdown menu showing International.
- Are you a faculty member traveling with students?: Dropdown menu showing -- Select --.
- Are you attending a Conference?: Dropdown menu showing Yes.
- Will there be personal time during this trip?: Check box (unchecked).
- Funding: Search for Funding text input field.

There are also informational messages and a blue 'Add Funding' button at the bottom.

- **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.

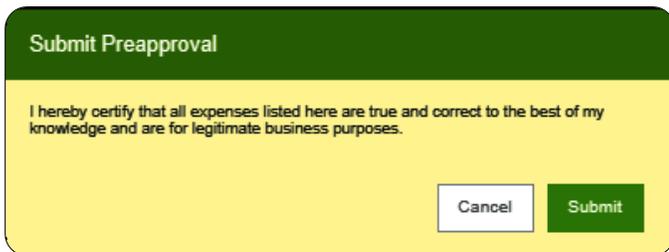
- The expense will be added to the Pre-Approval Report and will be visible on the left side of the screen. The Add Pre-Approval Types page will appear on the right side of the screen.

- 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.

A screenshot of a 'Submit Preapproval' dialog box. The dialog has a dark green header with the text 'Submit Preapproval'. Below the header is a yellow background containing a certification statement: '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 are two buttons: a white 'Cancel' button and a dark green 'Submit' button.

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.