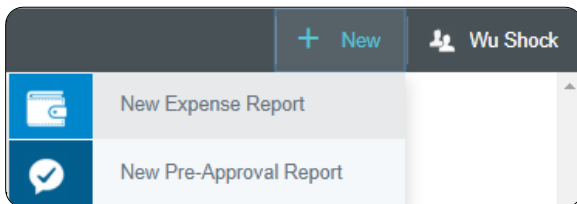


Quick Reference

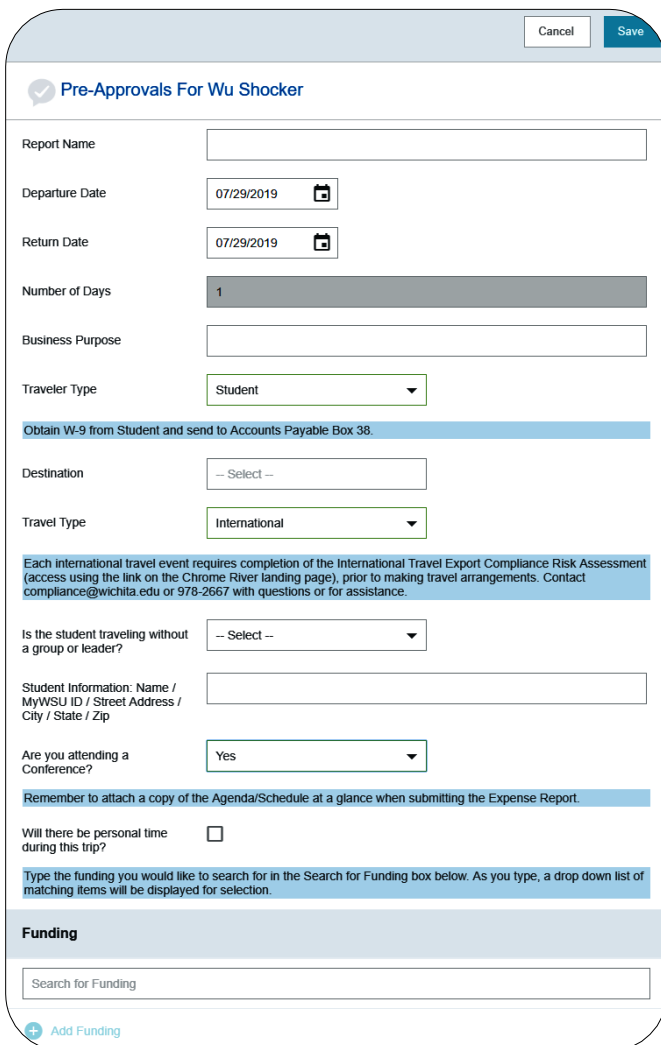
Create Pre-Approval Report (Student)

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 include: 'Report Name' (text input), 'Departure Date' (calendar icon, value: 07/29/2019), 'Return Date' (calendar icon, value: 07/29/2019), 'Number of Days' (value: 1), 'Business Purpose' (text input), 'Traveler Type' (dropdown menu, value: Student), 'Destination' (dropdown menu, value: -- Select --), 'Travel Type' (dropdown menu, value: International), 'Is the student traveling without a group or leader?' (dropdown menu, value: -- Select --), 'Student Information: Name / MyWSU ID / Street Address / City / State / Zip' (text input), 'Are you attending a Conference?' (dropdown menu, value: Yes), 'Will there be personal time during this trip?' (checkbox, unchecked), and 'Funding' (text input, value: Search for Funding). There are several informational messages in blue boxes, such as 'Obtain W-9 from Student and send to Accounts Payable Box 38.' and 'Each international travel event requires completion of the International Travel Export Compliance Risk Assessment...'. At the bottom left, there is an 'Add Funding' button.

- **Report Name:** Naming Convention: Student Last Name, Student 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 Student
- **Destination:** Select the Country/State/City you are traveling to.
- **Travel Type:** Select either In State, Out of State or International
- **Is the student traveling without a group of leader:** Select either Yes or No
- **Student Information:** Provide the Name, myWSU ID, Street Address, City, State, and Zip code of the Student
- **Are you attending a conference:** Select **Yes** if the student will be attending a conference. Remember: a conference agenda or schedule at a glance must be attached when submitting the expense report. Select **No** if the student 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

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.

CHROME RIVER

Pre-Approvals For Wu Shock

Testing Pre-Approval for Training Doc

EXPENSE	ESTIMATED
Mileage / Private Vehicle	23.51 USD
Train / Rail	7.50 USD
Hotel	750.00 USD
Airfare	575.00 USD

ADD PRE-APPROVAL TYPES

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

- 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.

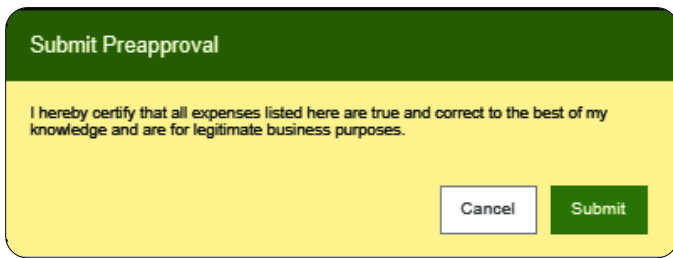
Pre-Approvals For Wu Shock

Testing Pre-Approval for Training Doc

EXPENSE	ESTIMATED
Mileage / Private Vehicle	23.51 USD
Train / Rail	7.50 USD
Hotel	750.00 USD
Airfare	575.00 USD

PA Report ID: 010000325438 Total Estimated Am...: 1,356.01 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.