Creating a Pre-Approval Report

Scenario:

Travel Dates: 10/1/2019-10/4/2019
Conference: Chrome River Users Group (CRUG)
Location: Salida, California

Step	What to Do	Notes
1.	Log into Chrome River Information provided in classroom	
2.	Click the + New icon and select New Pre-Approval Report	
3.	The Pre-Approval Header page will be displayed on the right side of the screen.	
4.	Enter the Report Name CRUG Conference, [future date range]	

Step	What to Do	Notes
6.	Select the Return Date: Click on the calendar icon Arrow to the proper month Click on the proper date	
7.	Enter the Business Purpose: Attending the Chrome River Users Group (CRUG) Conference to obtain knowledge re: higher ed practices and network with professionals from peer institutions.	The business purpose should explain what purpose the expenditure served, why the expense was necessary, how it furthered the University's goals
8.	Select the appropriate Traveler Type: Employee	
9.	Enter the Destination of the travel event: Begin typing the destination city in the field The system will begin to display values matching the information entered Select the appropriate value For this example select: United States / California / Salida	

Step	What to Do	Notes
12.		

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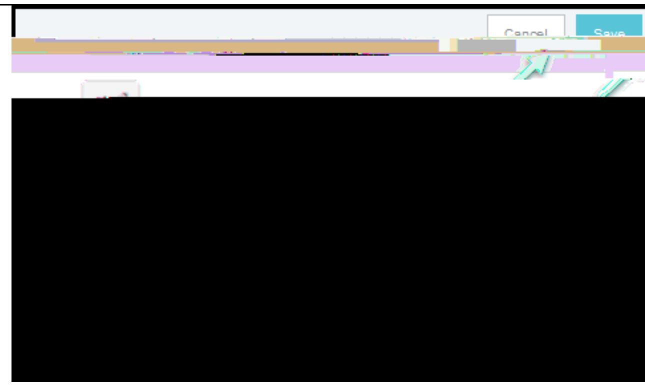
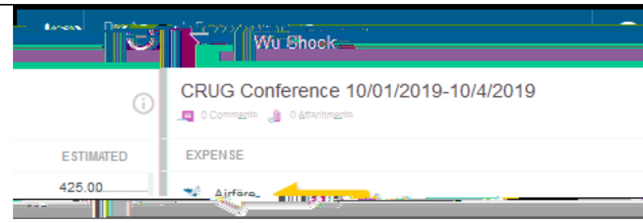
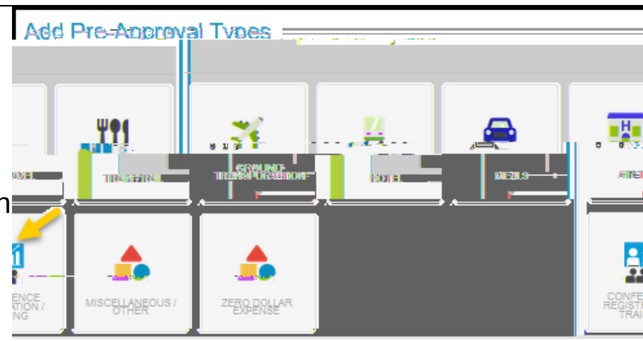
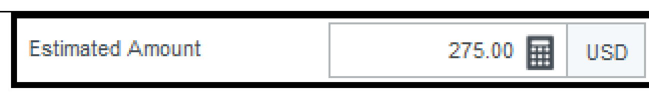
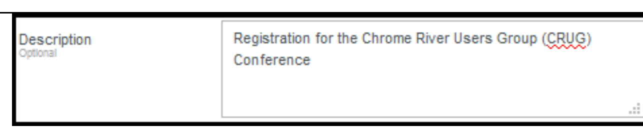
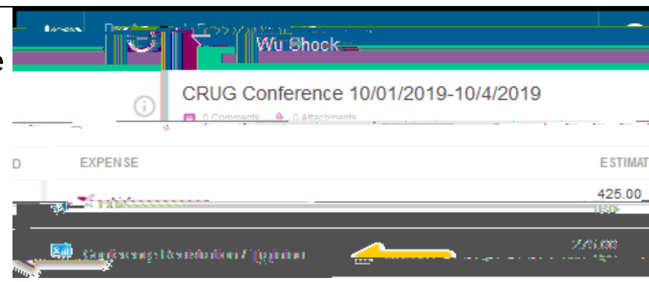
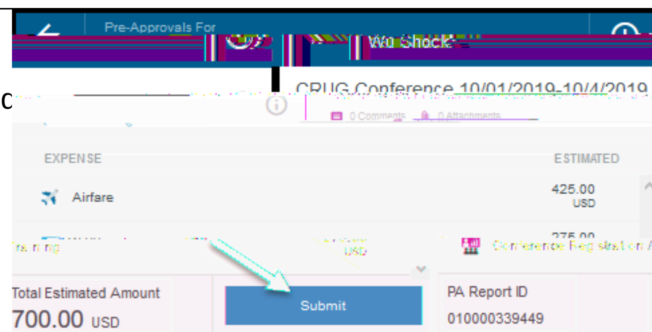
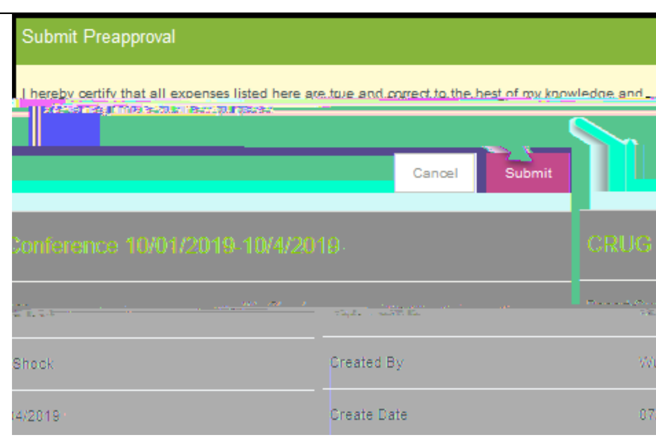
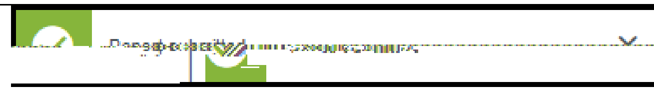
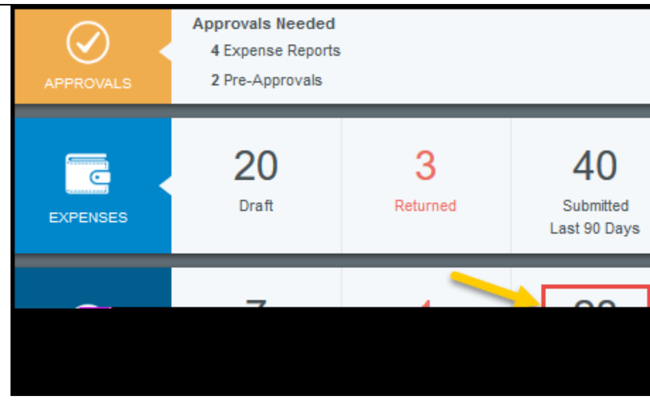
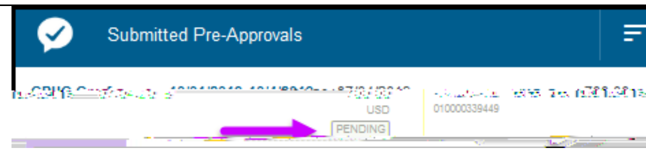
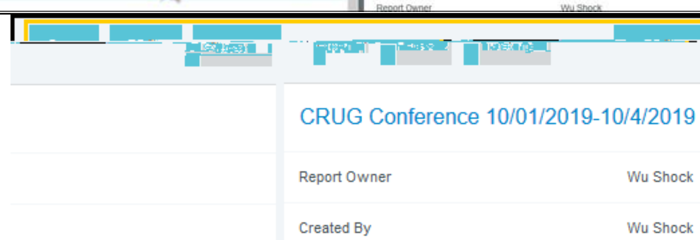
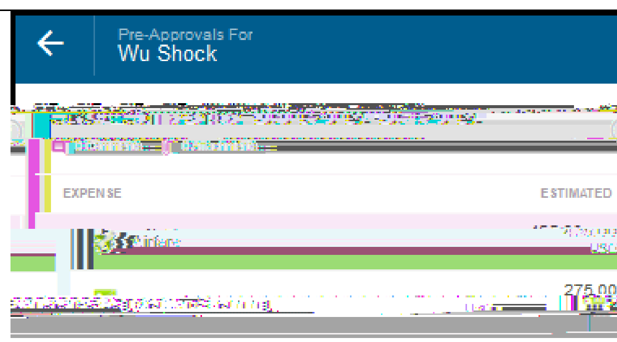
17.	The Add Pre-Approval Types screen will appear o the right side of the screen.	
18.	Select Air Travel, and select Airfare from the options that display.	
19.	The Airfare expense form will display	
20.	Estimated Amount: Enter 425.00	
21.	Description (optional): The Description will be used to give more explanation of the expense Enter Airfare from Wichita to California	
22.	To Be Paid By: Click the drop down arrow and select the appropriate value, options include o Accounts Payable Invoice o Foundation Funds o No Cost to WSU o Personal Funds o Procurement Card	

<table>
<tr><th>Step</th><th>What to Do</th><th>Notes</th></tr>
<tr><td>23.</td><td>Click Save in the upper right hand corner.</td><td>
</td></tr>
<tr><td>24.</td><td>The expense will be added to the report and displayed in the expense list on the left side of the screen.</td><td>
</td></tr>
<tr><td>25.</td><td>Select the Conference Registration / Training expense tile located on the right side of the screen.

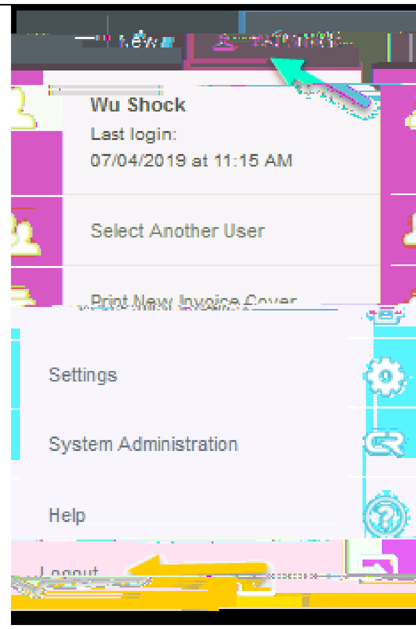
**Note: If the expense tiles are not visible on the right side of the screen, click the add expense icon to display.


</td><td>
</td></tr>
<tr><td>26.</td><td>The Conference Registration / Training form will display.</td><td></td></tr>
<tr><td>27.</td><td>Estimated Amount:
Enter 275.00</td><td>
</td></tr>
<tr><td>28.</td><td>Description (optional):
The Description will be used to give more explanation of the expense
Enter Registration for the Chrome River Users Group (CRUG) Conference</td><td>
</td></tr>
</table>

Step	What to Do	Notes
29.	To Be Paid By: Click the drop down arrow and select the appropriatevalue, options include o Accounts Payable Invoice o Foundation Funds o No Cost to WSU o Personal Funds o Procurement Card	
30.	Click Save in the upper right hand corner.	
31.	The expense will be added to the report and displayed in the expense list on the left side of the screen	
32.	Review the information presented on the left sid of the screen Ensure all expense types have been added to the report Take note of the PA Report ID (if needed) Verify the total estimated amount is correct When finished, click the submit button	
33.	The Submit Preapproval screen will display on t right side of the screen. Review the report summary information Read the certification statement Click Submit to submit the report	

Step	What to Do	Notes
34.	The confimation message will display.	
35.	Click the “ChromeRiver” icon to return to the home page.	
36.	To view the submitted report, click on the number listed in the “Submitted Last 90 days”sectionof the PreApproval	
37.	Locate the report in the SubmittedPre-Approvals list. Note: The report status is displayed below the amount field. Statuses include: o Pending o Approved o Partially Applied o Used/Expired	
38.	Click to display the report on the right	
39.	Four options will be displayed along the top of the report: Open PDF Tracking Recall	
40.	Selecting Open will allow you to review the PreApproval report and individual expense lines in greater detail. Click the arrow pointing left to get back to the options screen. **Repeat steps 35-38 to return to the options screen**	

Step	What to Do	Notes
41.	Selecting PDF will display two options to select from: Full Report will create a PDF of the full report minus any attachments Full Report with Receipts will create a PDF of the full report and all attachments **Close the new window that opened with the PDF Report and you are now back at the options screen**	
42.	Selecting the Tracking button will display where the report is in the approval process. **Click the "X" in the upper right hand corner, and repeat steps 35-38 to return to the options screen****	
43.	Selecting the Recall button will remove the report from workflow and return it to the expense owners draft Pre	

Step	What to Do	Notes
44.	Log out by clicking the user icon in the upper rig hand corner of the screen and selecting Logout	
45.	Complete	