

Quick Reference

Create Pre-Approval Report (Candidate)

Create New Pre-Approval Report

1. Click the **+CREATE** button in the upper right corner of the Pre-Approval swim lane.

Pre-Approval

0 Draft 0 Returned 4 Submitted Last 90 days

➕ Create

2. Enter the Header data:

Pre-Approvals For Wu Shocker

Report Name:

Departure Date: 07/29/2019

Return Date: 07/29/2019

Number of Days: 1

Business Purpose (Optional):

Traveler Type: Candidate

Candidate Information: Name/Street Address/City/State/Zip:

WSU Position Number / Position Title:

Division Routing: -- Select --

Department: -- Select --

Will there be personal time during this trip?

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.

Funding: D10252-101510-01620 D10252: RU Controller's Office 101510: Financial Operations

-- Select --

+ Add Funding

- **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 --

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

- 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.

Pre-Approvals For Wu Shock

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

| EXPENSE | ESTIMATED |
|---------|------------|
| 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

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

0 Comments 0 Attachments

| 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

- 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.