Chrome River User Manual

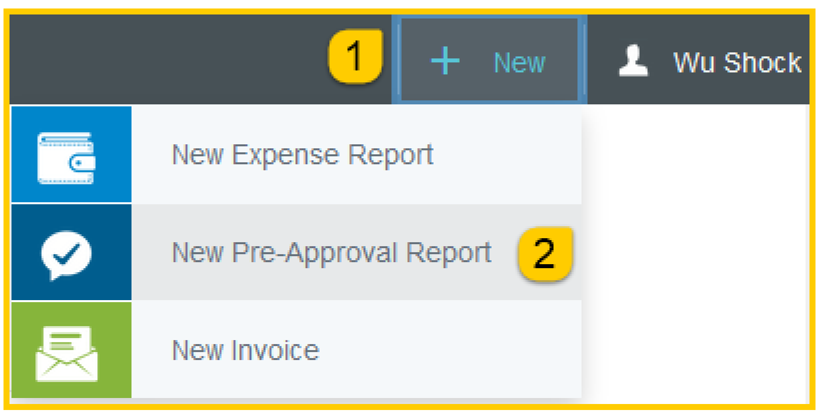
CREATE A PRE-APPROVAL REPORT - EMPLOYEE

Any employee proposing to travel out-of-state or internationally must complete and submit a Pre-Approval Report. Upon final approval of the Pre-Approval Report, the employee may begin incurring expenses in association with the travel event. Refer to policy 3.28 / Out-of-State Travel, for additional details.

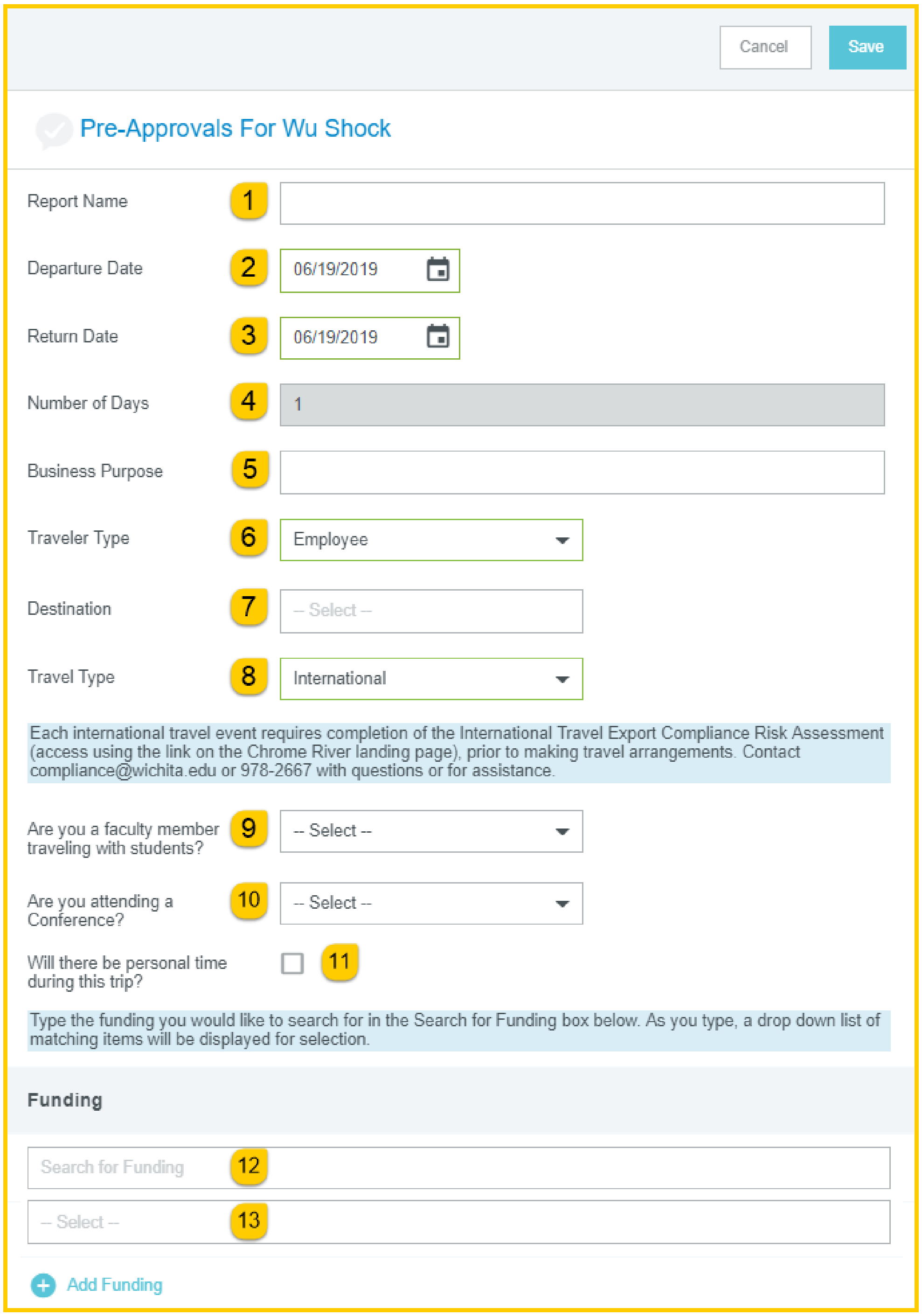
Each international travel event requires completion of the International Travel Export Compliance Risk Assessment prior to making travel arrangements. Click HERE to access the survey. Contact compliance@wichita.edu or 978-2667 with questions or for assistance.

Employee Pre-Approval Report

To create a Pre-Approval Report, click the **+NEW** button in the upper right corner and select **New Pre-Approval Report** from the drop-down menu.



The Pre-Approval header screen will appear.

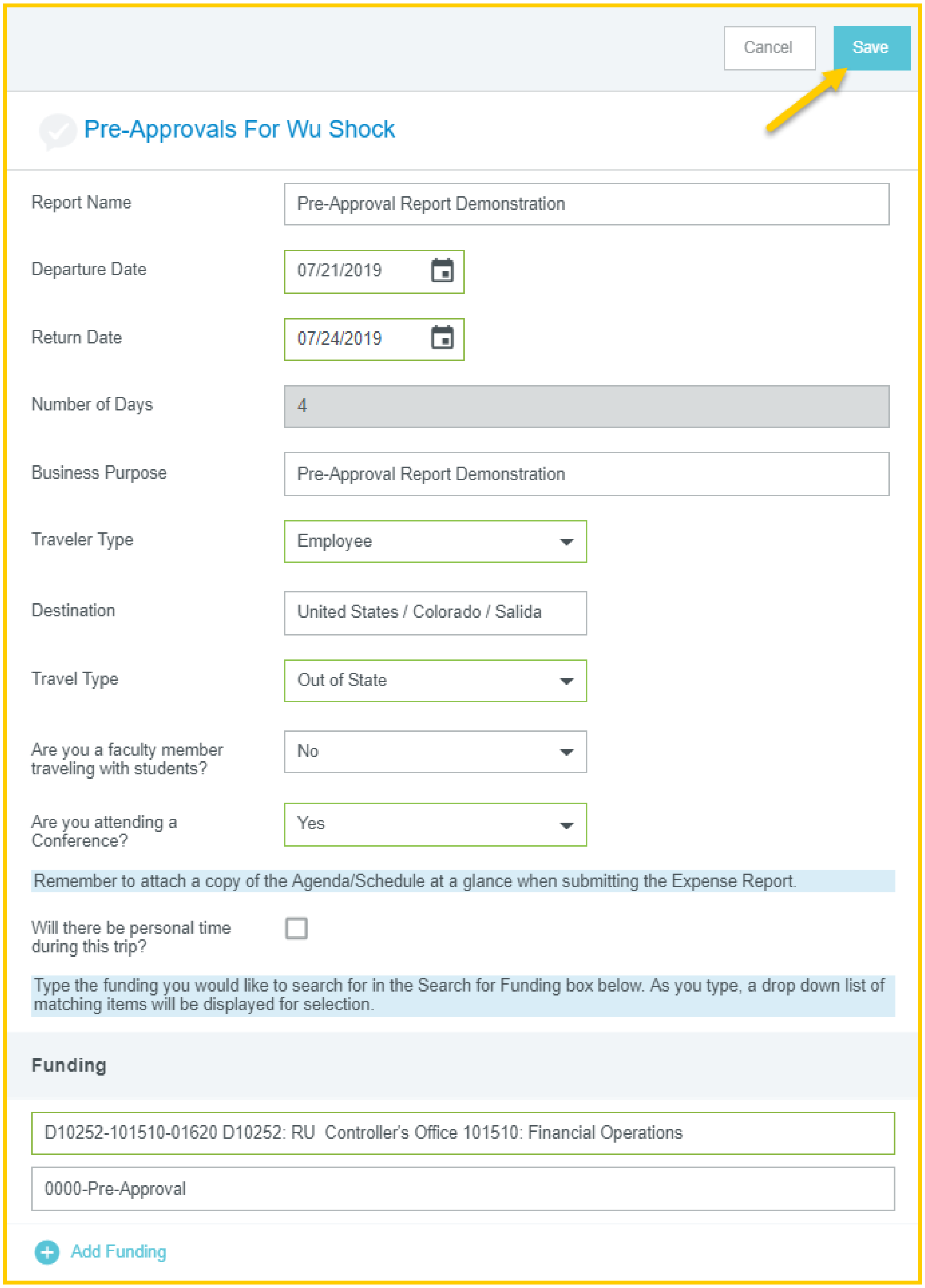


Enter the Header data:

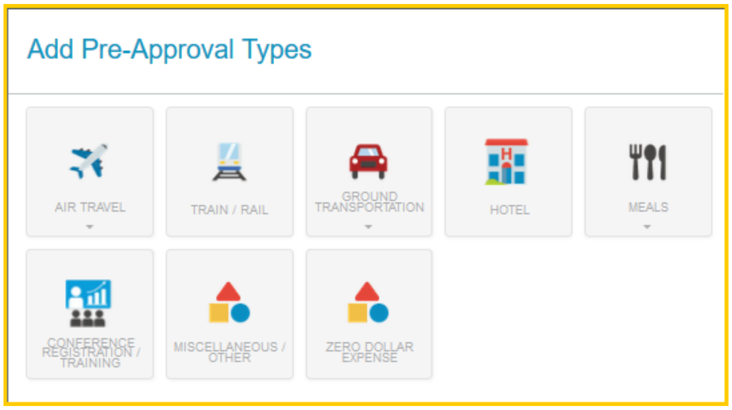
1. **<u>Report Name:</u>** This is the name assigned by the expense creator, which is used in tracking and inquiry to help identify expense reports. Naming Convention: Meeting/Conference Name or Destination, Dates of Travel
2. **<u>Departure Date:</u>** Click the calendar icon to select the date which represents the anticipated departure date for this travel event.
3. **<u>Return Date:</u>** Click the calendar icon to select the date which represents the anticipated return date for this travel event.
4. **<u>Number of Days:</u>** This field will populate based on the Departure/Return dates entered.
5. **<u>Business Purpose:</u>** Enter a clear, detailed business purpose for the travel event. The business purpose should explain: (1) what purpose the expenditure served, (2) why the expense was necessary, and (3) how it furthered the University's goals. See the **CR0027 Business Purpose** document for more detailed information.
6. **<u>Traveler Type:</u>** Select Employee
7. **<u>Destination:</u>** Select the Country/State/City you are traveling to. Destinations are preloaded in Chrome River and are presented in the following format: Country/State/City. Begin typing the destination city to narrow down the choices.
8. **<u>Travel Type:</u>** Select either In State, Out of State, or International
9. **<u>Are you a faculty member traveling with students:</u>** Select Yes or No from the drop down list.
10. **<u>Are you attending a Conference:</u>** Select Yes or No from the drop down list.
11. **<u>Will there be personal time during this trip</u>**: Leave the box blank if there will **<u>not</u>** be personal time included in this travel event. Select the check box if there **<u>will be</u>** personal time included in this travel event.
12. **<u>Funding:</u>** Select the proper funding for the Pre-Approval Report. Begin typing the Fund, Org, or Department Name, and select the appropriate value once it appears below the box you are typing in.
13. **<u>-Select-:</u>** Select the value **0000-Pre-Approval** from the drop down list.

If you have more than one Funding string for the Pre-Approval, click **Add Funding** to add additional funding lines.

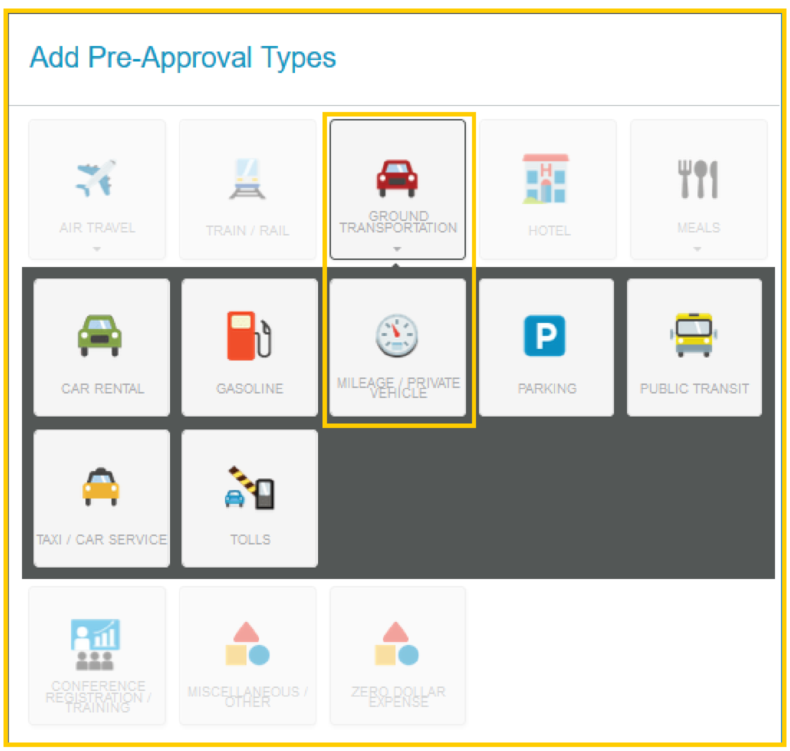
Click **Save** at the upper right side of the screen to continue.


Cancel
Save
Pre-Approvals For Wu Shock
Report Name
Pre-Approval Report Demonstration
Departure Date
07/21/2019
Return Date
07/24/2019
Number of Days
4
Business Purpose
Pre-Approval Report Demonstration
Traveler Type
Employee
Destination
United States / Colorado / Salida
Travel Type
Out of State
Are you a faculty member traveling with students?
No
Are you attending a Conference?
Yes
Remember to attach a copy of the Agenda/Schedule at a glance when submitting the Expense Report.
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
0000-Pre-Approval
Add Funding

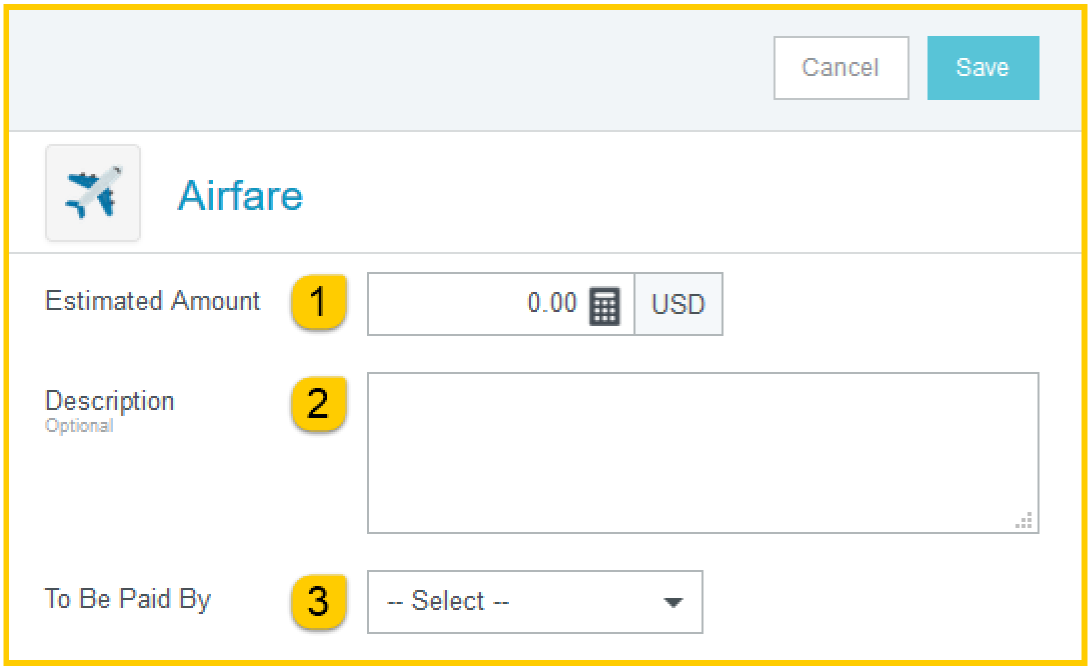
After completing the Pre-Approval Header information, you will be prompted to add your expenses. The **Add Pre-Approval Types** screen will slide in from the right.



The expense types are consolidated into categories (expense tiles). Some expense tiles expand to provide additional expense options. Example: **Mileage** is located under **Ground Transportation**.



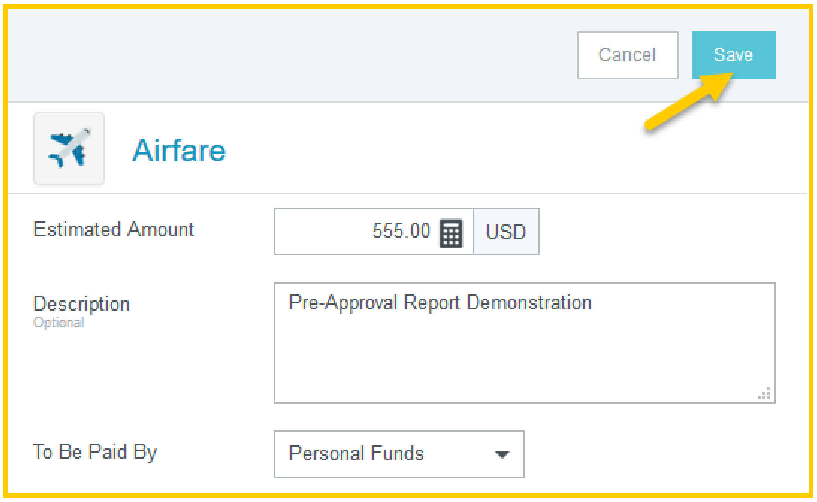
Select the specific expense tile you want to add to the Pre-Approval. Each expense selected will open in a form and require additional information. For detailed information on each Expense Tile, please see the **CR0018 Pre-Approval Expense Tile Detail** help document.



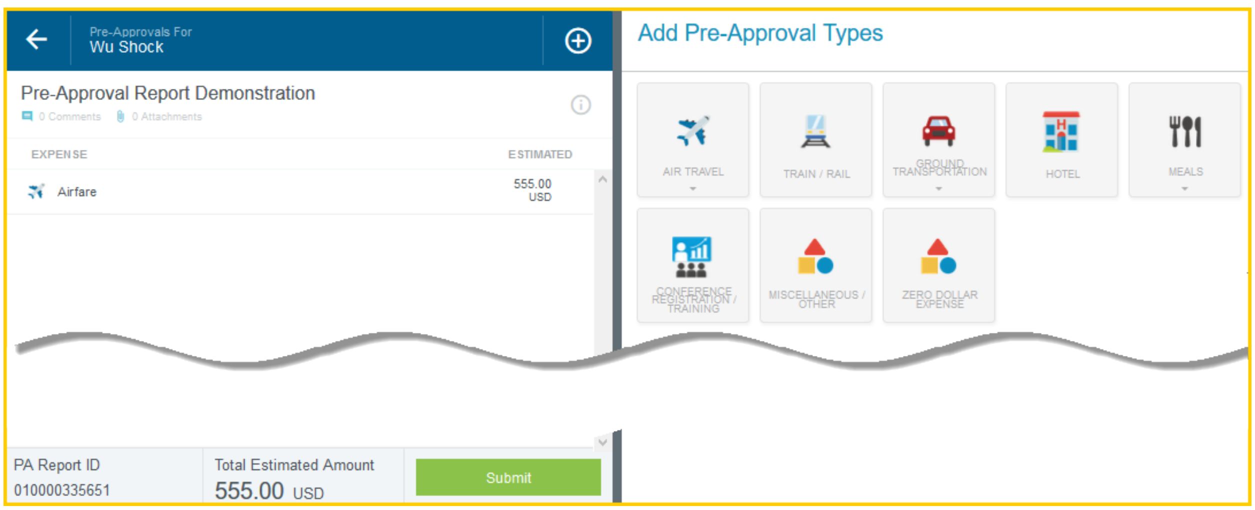
All the expense tile forms, with the exception of **Mileage**, **Hotel** and **Meals**, contain the following fields:

1. **Estimated Amount:** Enter the estimated amount for this expense type.
2. **Description:** Provide any additional information about this expense. This field is optional for most expense types.
3. **To Be Paid By:** Select the option that best describes the anticipated payment method for the expense. Options include:
    - (a) Accounts Payable Invoice
    - (b) Foundation Funds
    - (c) No Cost to WSU
    - (d) Personal Funds
    - (e) Procurement Card (WSU issued)

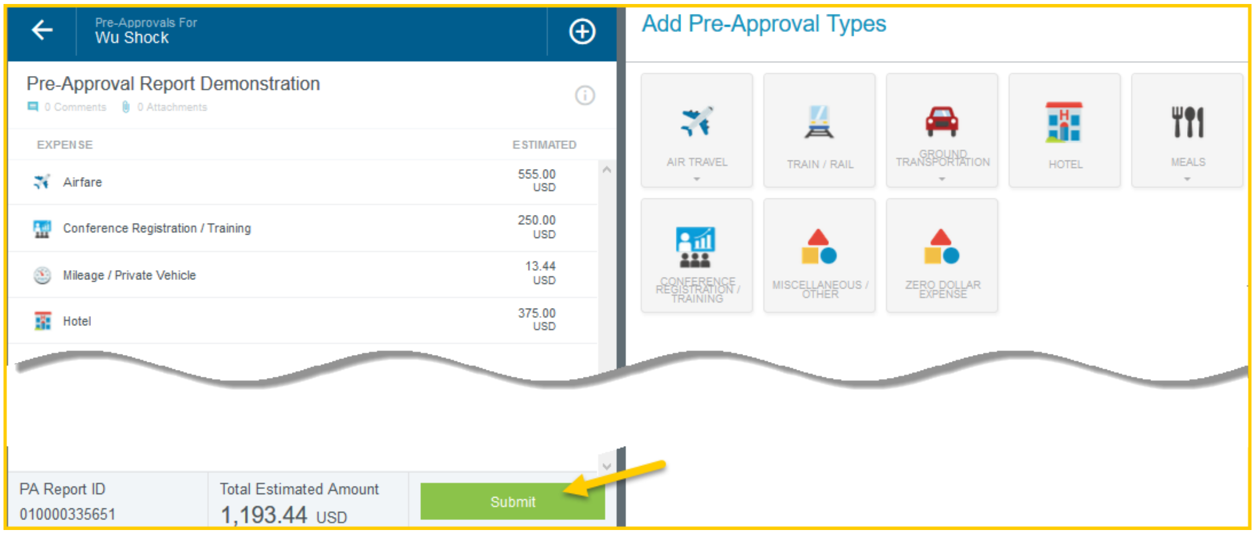
Complete the expense tile form and click **Save** at the upper right side of the screen to continue.



The expense will be added to the Pre-Approval Report and will be visible on the left side of the screen.



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.



A Submit Preapproval message will appear at the top of the right side of the screen. Once you have read the certification statement, click the **Submit** button.