

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 <u>HERE</u> 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.





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The Pre-Approval header screen will appear.

	Cancel Sa	ve					
Pre-Approvals For Wu Shock							
Report Name	1						
Departure Date	2 06/19/2019						
Return Date	3 06/19/2019						
Number of Days	<mark>4</mark> 1						
Business Purpose	5						
Traveler Type	6 Employee 👻						
Destination	7 – Select –						
Travel Type	8 International -						
(access using the link on th	nt requires completion of the International Travel Export Compliance Risk Assessme Chrome River landing page), prior to making travel arrangements. Contact 978-2667 with questions or for assistance.	ent					
Are you a faculty member traveling with students?	9 Select 👻						
Are you attending a Conference?	10 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							
Search for Funding	12						
- Select -	13						
+ Add Funding							



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. **Business Purpose:** 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.



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	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	ne 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								



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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**.





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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.

		Cancel Save
🛪 Airfare		
Estimated Amount 1	0.00 🖬 USD	
Description 2		.::
To Be Paid By 3	Select 🔻	

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. <u>Description</u>: Provide any additional information about this expense. This field is optional for most expense types.
- 3. <u>**To Be Paid By:**</u> 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.



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	Cancel Save
X Airfare	
Estimated Amount	555.00 🔲 USD
Description Optional	Pre-Approval Report Demonstration
To Be Paid By	Personal Funds 👻

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

+ Pre-Approval Wu Shock			Ð	Add Pre-Approval Types				
Pre-Approval Reg	port Demonstration		(i)	- 24	4	A		¥¶1
EXPENSE		ESTIMA	ATED					
🛪 Airfare		555.00 USD		AIR TRAVEL	TRAIN / RAIL		HOTEL	MEALS
			v	REDISTRATION/ TRAINING	MISCELLANEOUS /	ZERO DOLLAR ZERO DOLLAR		
PA Report ID 010000335651	Total Estimated Amount 555.00 USD	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.



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+ Pre-Approvals Fo Wu Shock	Ovals For Ock Add Pre-Approval Types						
Pre-Approval Report		(j)		4	A	H	¥ †1
EXPENSE		ESTIMATED					
🐳 Airfare		555.00 ^	AIR TRAVEL	TRAIN / RAIL		HOTEL	MEALS
Conference Registration	n / Training	250.00 USD	1				
Mileage / Private Vehicle	9	13.44 USD	CONFERENCE REGISTRATION / TRAINING	MISCELLANEOUS /	ZERO DOLLAR EXPENSE		
Hotel		375.00 USD	TRAINING				
		v					
PA Report ID 010000335651	Total Estimated Amount 1,193.44 USD	Submit					

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.

+ Pre-Approvals For Wu Shock		÷	Submit Preapproval		
Pre-Approval Report Demonstration		()	I hereby certify that all expenses listed here are true and correct to the best of my knowledge and a legitimate business purposes.		
EXPENSE		ESTIMATED		c	ancel Submit
🛪 Airfare		555.00 A			
Conference Registration /	/ Training	250.00 USD	Pre-Approval Report Demo	onstration	·
Mileage / Private Vehicle		13.44 USD	Report Owner	Wu Shock	
Hotel		375.00 USD	Created By	Wu Shock	
			Create Date	06/19/2019	
			Pay Me Amount	1,193.44 USD	
			PA Report ID	010000335651	
			From Date	07/21/2019	
			To Date	07/24/2019	
			Expense Summary		
				AMOUNT (USD)	SUBMITTED (USD)
PA Report ID	Total Estimated Amount		Airfare	555.00	0.00
010000335651	1,193.44 USD	Submit	Conference Registration / Training	250.00	0.00