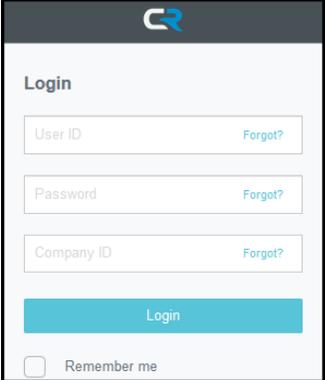
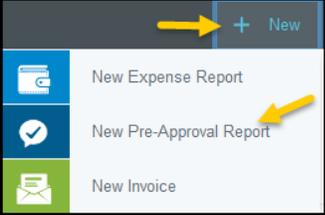
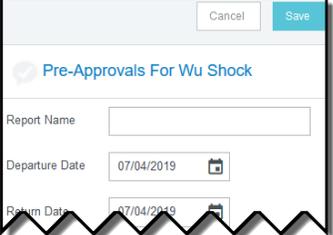
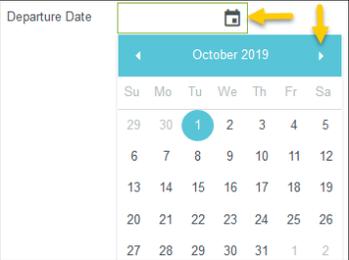
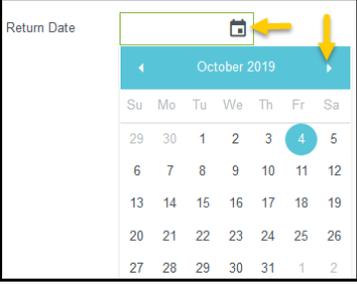
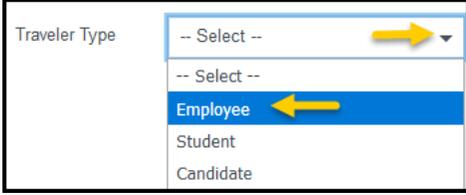
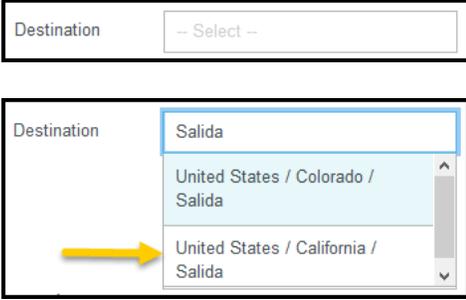
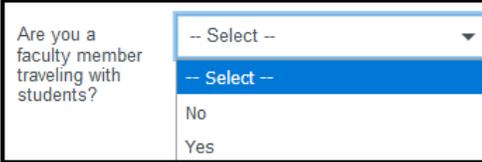


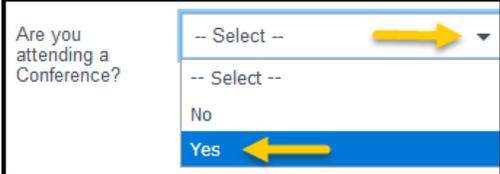
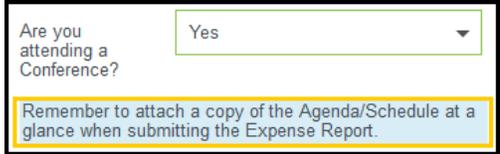
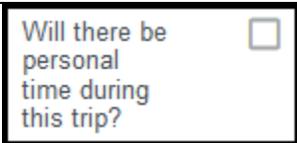
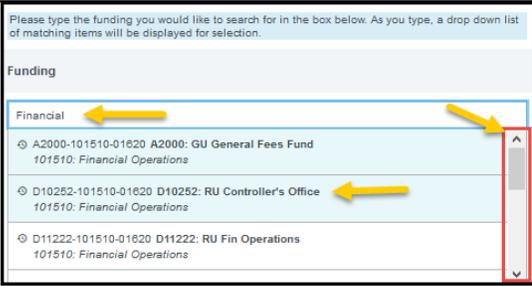
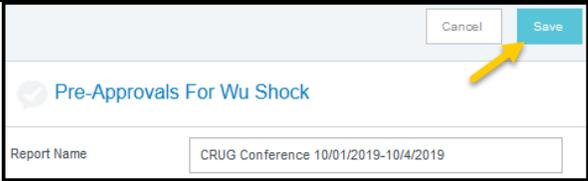
Creating a Pre-Approval Report

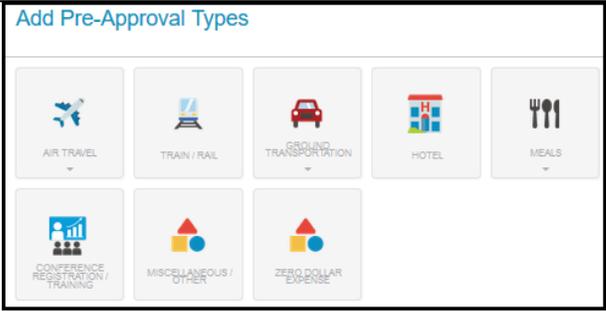
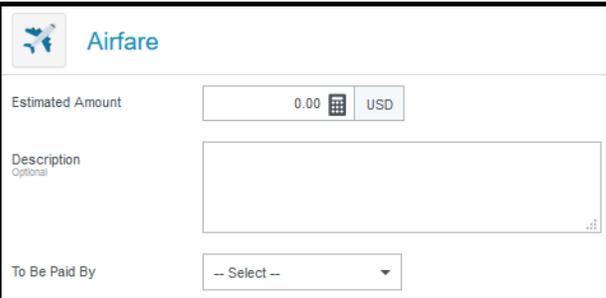
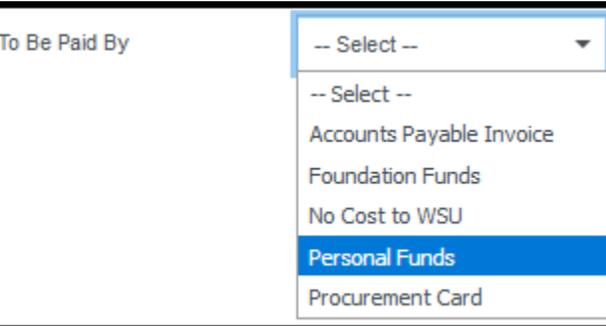
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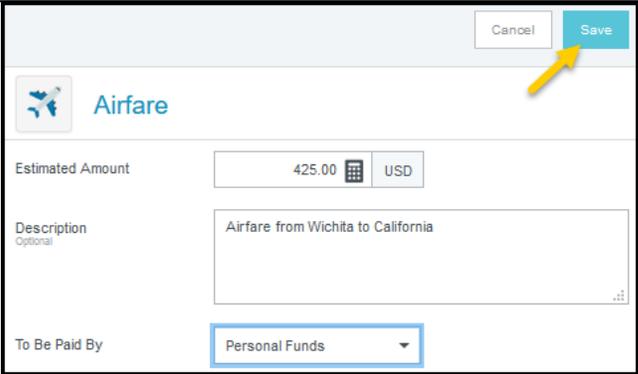
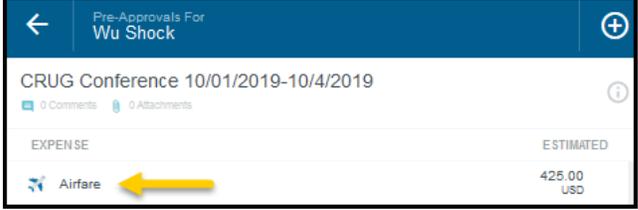
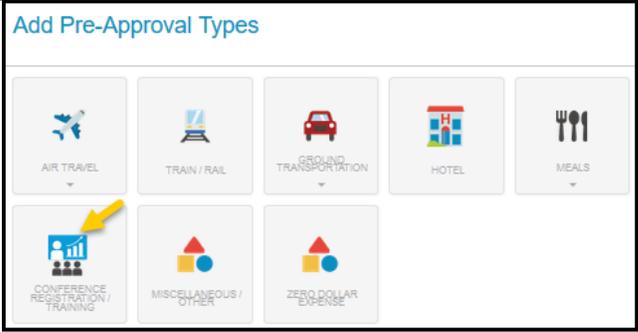
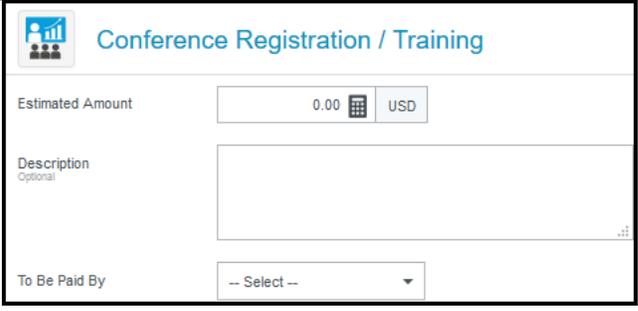
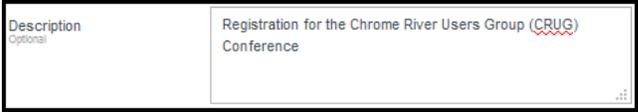
Travel Dates: 10/1/2019-10/4/2019
 Conference: Chrome River Users Group (CRUG)
 Location: Salida, California

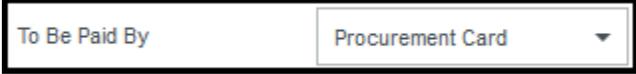
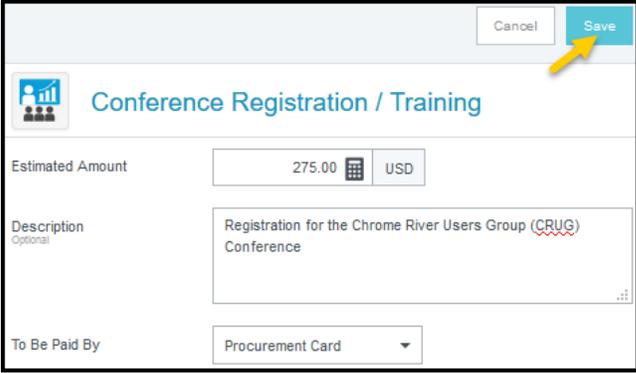
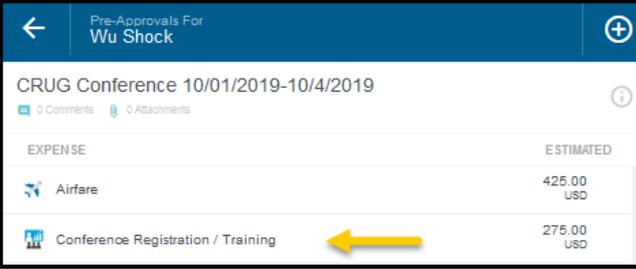
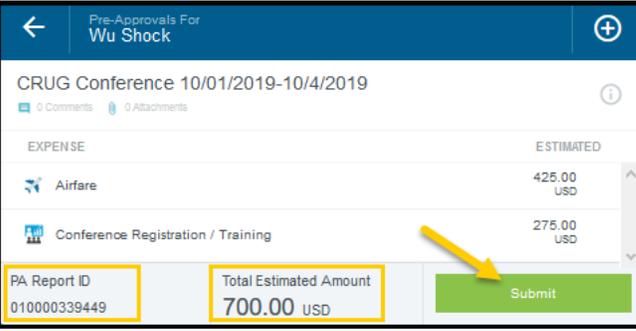
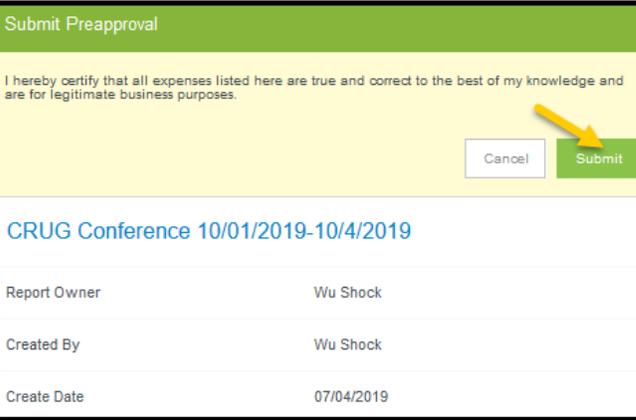
Step	What to Do	Notes
1.	Log into Chrome River ➤ Information provided in classroom	
2.	Click the + New icon and select New Pre-Approval Report	
3.	The Pre-Approval Header page will be displayed on the right side of the screen.	
4.	Enter the Report Name: ➤ CRUG Conference, [future date range]	<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> Report Name <input style="width: 150px;" type="text"/> </div> Naming convention for the Report Name field is: <ul style="list-style-type: none"> ➤ Meeting/Conference Name or Destination and Dates of Travel ➤ <u>Example:</u> CRUG Conference, 10/01/2019-10/04/2019
5.	Select the Departure Date: ➤ Click on the calendar icon ➤ Arrow to the proper month ➤ Click on the proper date	

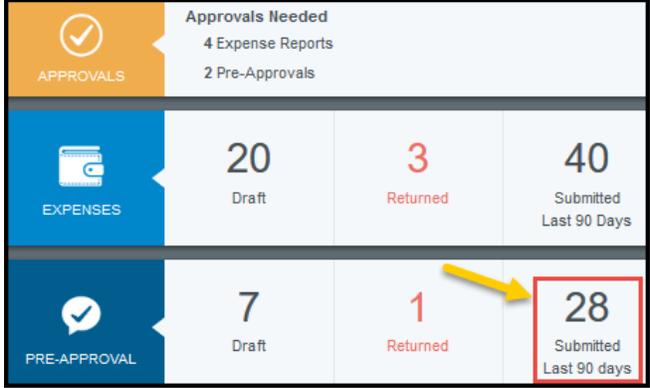
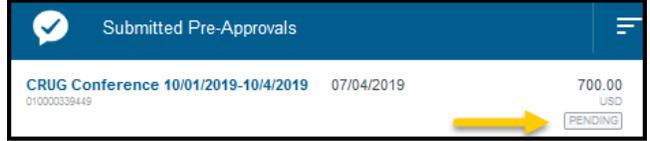
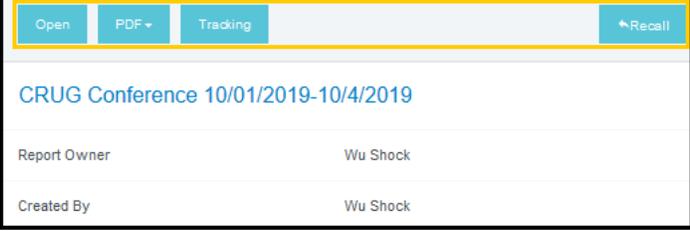
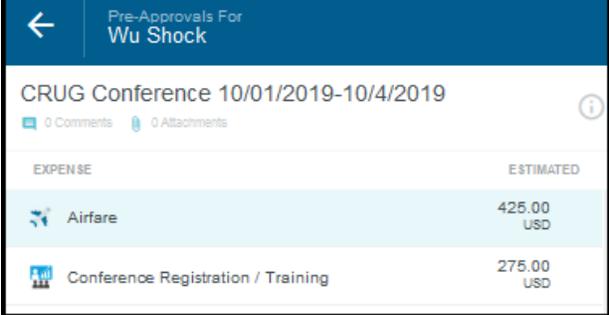
Step	What to Do	Notes
6.	Select the Return Date: <ul style="list-style-type: none"> ➤ Click on the calendar icon ➤ Arrow to the proper month ➤ Click on the proper date 	
7.	Enter the Business Purpose: <ul style="list-style-type: none"> ➤ Attending the Chrome River Users Group (CRUG) Conference to obtain knowledge re: higher ed practices and network with professionals from peer institutions. 	 <p>The business purpose should explain:</p> <ul style="list-style-type: none"> ➤ what purpose the expenditure served, ➤ why the expense was necessary, ➤ how it furthered the University's goals
8.	Select the appropriate Traveler Type: <ul style="list-style-type: none"> ➤ Employee 	
9.	Enter the Destination of the travel event: <ul style="list-style-type: none"> ➤ 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 	
10.	Select the Travel Type: <ul style="list-style-type: none"> ➤ Out of State 	
11.	Select the appropriate answer to the "Are you a faculty member traveling with students" question: <ul style="list-style-type: none"> ➤ Either value is appropriate for this testing scenario 	

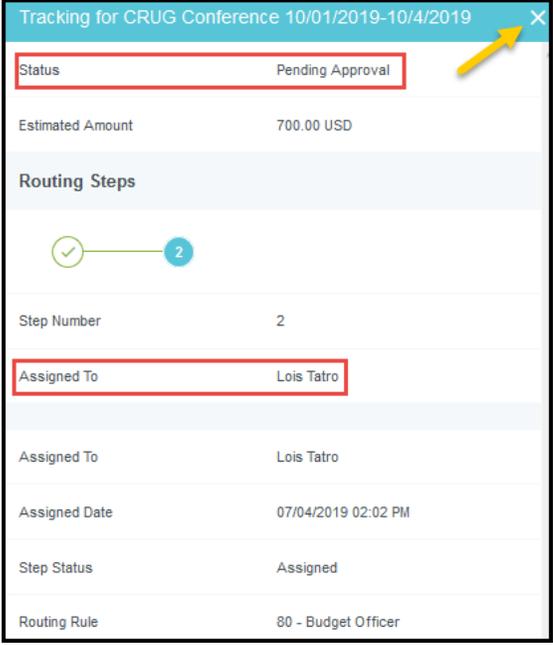
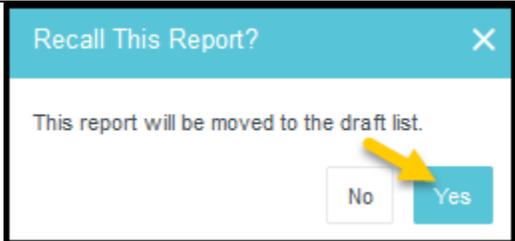
Step	What to Do	Notes
12.	<p>Select the appropriate answer to the “Are you attending a Conference” question:</p> <ul style="list-style-type: none"> ➤ Select Yes <p>**Notice the Blue highlighted message that appears below the question**</p>	 
13.	<p>Will there be personal time during this trip?</p> <ul style="list-style-type: none"> ➤ If your travel event includes both personal and business travel select the check box next to the “Will there be personal time during this trip” question. <p>For this scenario, leave the checkbox unchecked</p>	
14.	<p>Begin typing in the Search for Funding box to locate and select the appropriate funding for the Pre-Approval Report.</p> <ul style="list-style-type: none"> ➤ As you begin typing, the system will display results that contain the value entered. ➤ Enter your Fund, Org or Department Name and click on the appropriate value from the displayed results 	 <p>**Use the scroll bar to see additional matches</p>
15.	<p>Once the funding value has been selected, the value “0000-Pre-Approval” will display below the funding line.</p>	
16.	<p>Click Save in the upper right hand corner of the form.</p>	

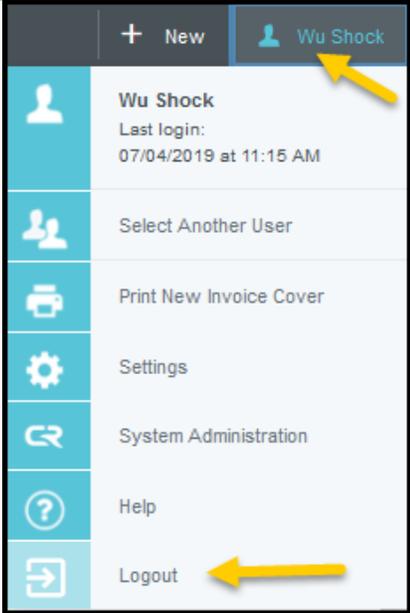
Step	What to Do	Notes
17.	The Add Pre-Approval Types screen will appear on the right side of the screen.	
18.	Select Air Travel, and select Airfare from the options that display.	
19.	The Airfare expense form will display	
20.	Estimated Amount: ➤ Enter 425.00	
21.	Description (optional): ➤ The Description 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 <ul style="list-style-type: none"> ○ Accounts Payable Invoice ○ Foundation Funds ○ No Cost to WSU ○ Personal Funds ○ Procurement Card 	

Step	What to Do	Notes
23.	Click Save in the upper right hand corner.	
24.	The expense will be added to the report and displayed in the expense list on the left side of the screen.	
25.	<p>Select the Conference Registration / Training expense tile located on the right side of the screen.</p> <p>**Note: If the expense tiles are not visible on the right side of the screen, click the add expense icon to display.</p>	
26.	The Conference Registration / Training form will display.	
27.	<p>Estimated Amount:</p> <ul style="list-style-type: none"> ➤ Enter 275.00 	
28.	<p>Description (optional):</p> <ul style="list-style-type: none"> ➤ The Description will be used to give more explanation of the expense ➤ Enter Registration for the Chrome River Users Group (CRUG) Conference 	

Step	What to Do	Notes
29.	<p>To Be Paid By:</p> <ul style="list-style-type: none"> ➤ Click the drop down arrow and select the appropriate value, options include <ul style="list-style-type: none"> ○ Accounts Payable Invoice ○ Foundation Funds ○ No Cost to WSU ○ Personal Funds ○ 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.	<p>Review the information presented on the left side of the screen</p> <ul style="list-style-type: none"> ➤ 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.	<p>The Submit Preapproval screen will display on the right side of the screen.</p> <ul style="list-style-type: none"> ➤ Review the report summary information ➤ Read the certification statement ➤ Click Submit to submit the report 	

Step	What to Do	Notes
34.	The confirmation 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” section of the Pre-Approval	
37.	<p>Locate the report in the Submitted Pre-Approvals list.</p> <ul style="list-style-type: none"> ➤ Note: The report status is displayed below the amount field. ➤ Statuses include: <ul style="list-style-type: none"> ○ Pending ○ Approved ○ Partially Applied ○ Used/Expired 	
38.	Click to display the report on the right.	
39.	<p>Four options will be displayed along the top of the report:</p> <ul style="list-style-type: none"> ➤ Open ➤ PDF ➤ Tracking ➤ Recall 	
40.	<p>Selecting Open will allow you to review the Pre-Approval report and individual expense lines in greater detail. Click the arrow pointing left to get back to the options screen.</p> <p>**Repeat steps 35-38 to return to the options screen**</p>	

Step	What to Do	Notes
41.	<p>Selecting PDF will display two options to select from:</p> <ul style="list-style-type: none"> ➤ 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 <p>**Close the new window that opened with the PDF Report and you are now back at the options screen**</p>	
42.	<p>Selecting the Tracking button will display where the report is in the approval process.</p> <p>**Click the "X" in the upper right hand corner, and repeat steps 35-38 to return to the options screen****</p>	
43.	<p>Selecting the Recall button will remove the report from workflow and return it to the expense owners draft Pre-approval section.</p> <ul style="list-style-type: none"> ➤ Pre-Approvals can only be recalled prior to obtaining final approval ➤ Once in draft status, the expense owner or delegate can make any need adjustments to the Pre-Approval Report ➤ Submitting the Pre-Approval will restart the workflow approval process 	

Step	What to Do	Notes
44.	Log out by clicking the user icon in the upper right hand corner of the screen and selecting Logout	 A screenshot of a user menu interface. At the top, there is a dark header bar with a plus sign and the word 'New' on the left, and a user profile icon with the name 'Wu Shock' on the right. Below this is a list of menu items, each with a teal icon on the left and text on the right. The items are: 'Wu Shock' (with a person icon and 'Last login: 07/04/2019 at 11:15 AM'), 'Select Another User' (with a group of people icon), 'Print New Invoice Cover' (with a printer icon), 'Settings' (with a gear icon), 'System Administration' (with a circular arrow icon), 'Help' (with a question mark icon), and 'Logout' (with a door icon). Two yellow arrows point to the 'Wu Shock' user name in the top right and the 'Logout' option at the bottom.
45.	Complete	