

## Creating a PreApproval Report

**Scenario:**

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


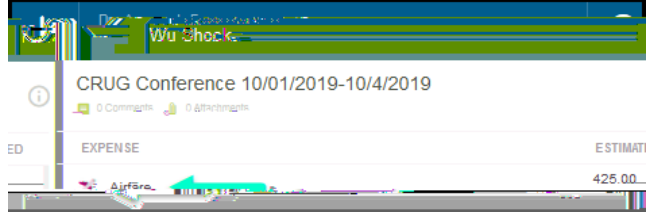

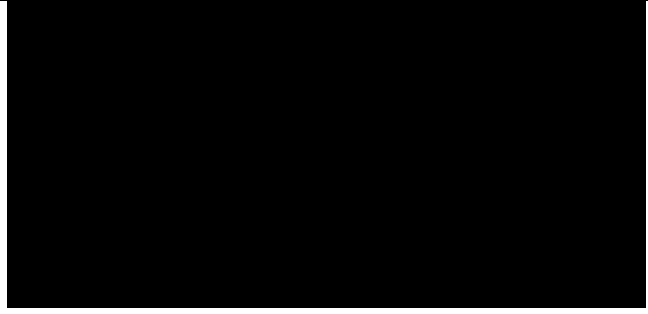

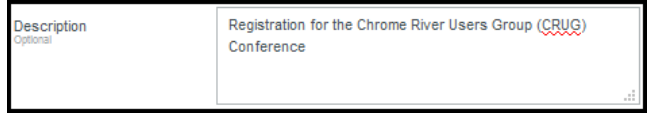
Step	What to Do	Notes
1.	Log into Chrome River Information provided in classroom	
2.	Click the + New icon and select New PreApproval Report	
3.	The PreApproval Header page will be displayed on the right side of the screen.	
4.	Enter the Report Name CRUG Conference, [future date range]	



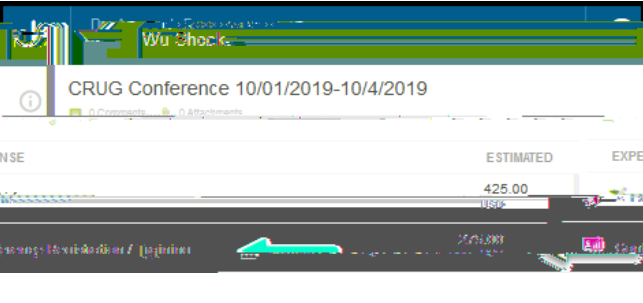
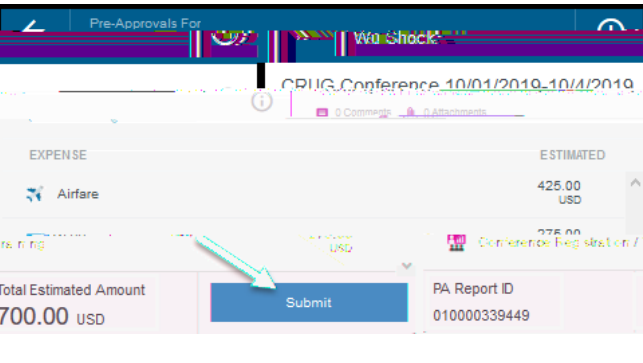
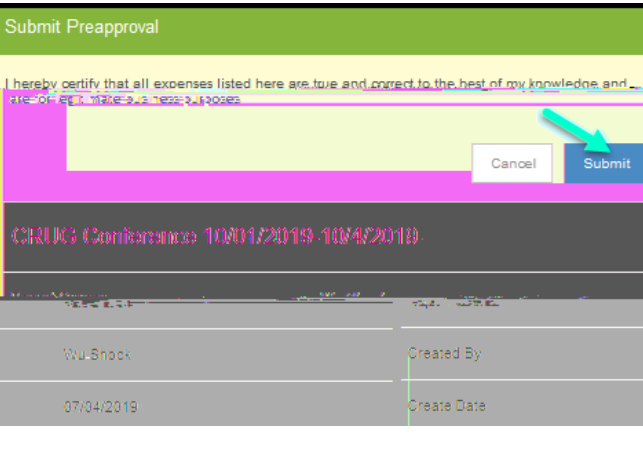
Step	What to Do	Notes
6.	Select the Return Date: Click on the calendar icon Arrow to the proper month Click on the proper date	
7.	Enter the Business Purpose: Attending the Chrome River Users Group (CRUG) Conference to obtain knowledge re: higher ed practices and network with professionals from peer 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	



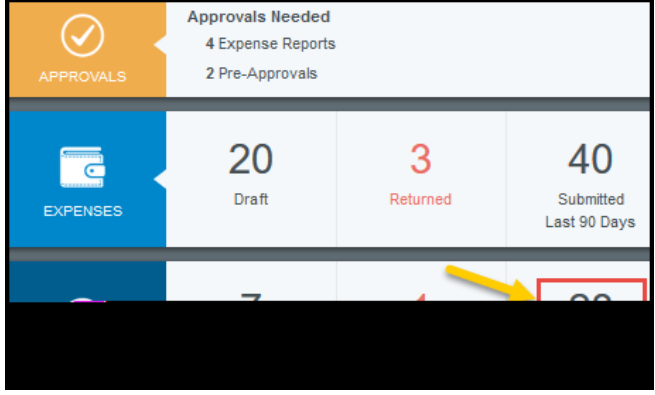
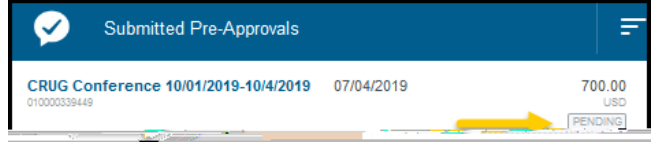

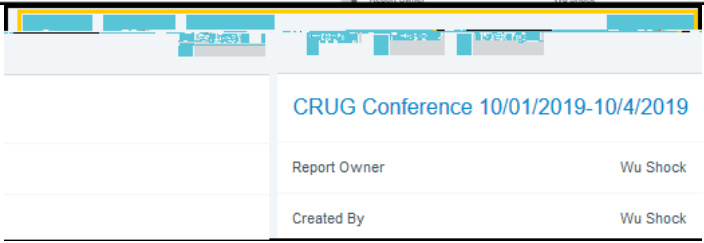
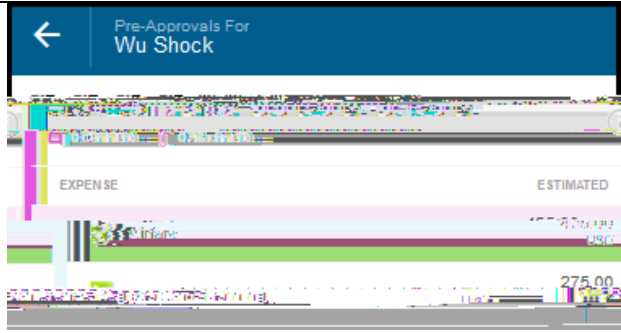
9. Enter the Destination of the travel event:  
 Begin typing the destination city in the  
 field  
 The system will begin to display values  
 matching the information entered  
 Select the appropriate value  
 For this example select:  
 United States / California / Salida


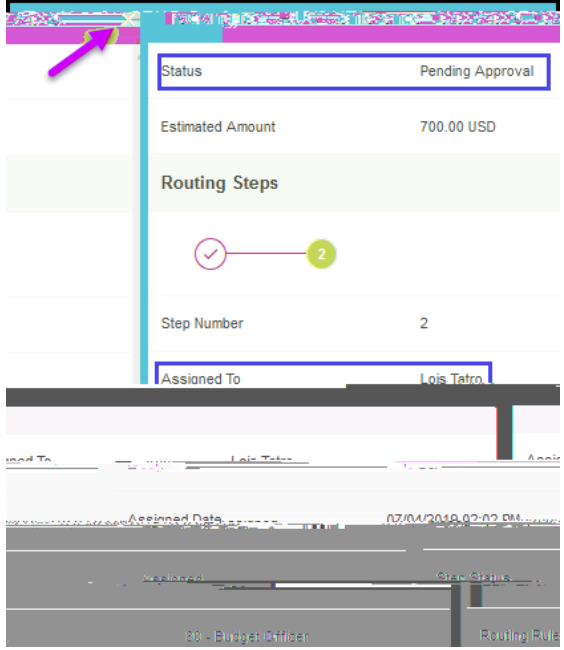
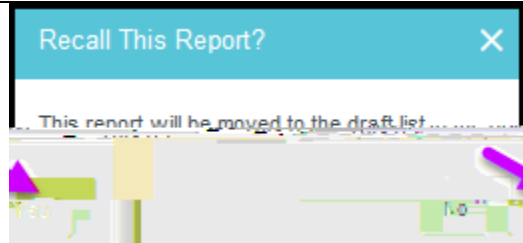
Step	What to Do	Notes
12.		

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"> <li>○ Accounts Payable Invoice</li> <li>○ Foundation Funds</li> <li>○ No Cost to WSU</li> <li>○ Personal Funds</li> <li>○ Procurement Card</li> </ul>	

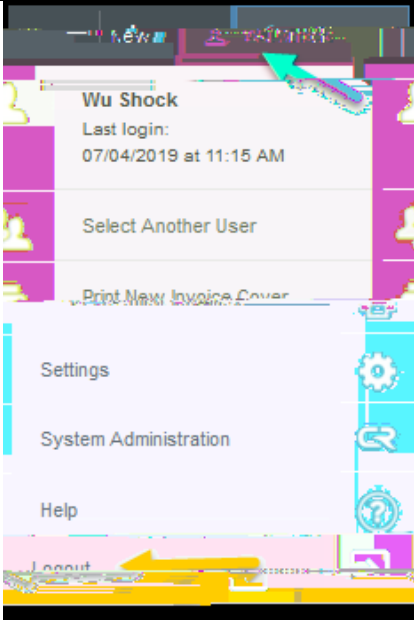
Step	What to Do	Notes
23.	Click Save in the upper right hand corner.	
24.	The expense will be added to the report and displayed in the expense list on the left side of the screen	
25.	<p>Select the Conference Registration/Training expense tile located on the right side of the screen.</p> <p><b>**Note:</b> 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.	Estimated Amount: Enter 275.00	
28.	<p>Description(optional): The Description will be used to give more explanation of the expense Enter Registration for the Chrome River Users Group (CRUG) Conference</p>	

Step	What to Do	Notes
29.	<p>To Be Paid By:</p> <p>Click the drop down arrow and select the appropriate value, options include</p> <ul style="list-style-type: none"> <li>○ Accounts Payable Invoice</li> <li>○ Foundation Funds</li> <li>○ No Cost to WSU</li> <li>○ Personal Funds</li> <li>○ Procurement Card</li> </ul>	
30.	<p>Click Save in the upper right hand corner.</p>	
31.	<p>The expense will be added to the report and displayed in the expense list on the left side of the screen</p>	
32.	<p>Review the information presented on the left side of the screen</p> <p>Ensure all expense types have been added to the report</p> <p>Take note of the PA Report ID (if needed)</p> <p>Verify the total estimated amount is correct</p> <p>When finished, click the submit button</p>	
33.	<p>The Submit Preapproval screen will display on right side of the screen.</p> <p>Review the report summary information</p> <p>Read the certification statement</p> <p>Click Submit to submit the report</p>	

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 PreApproval	
37.	<p>Locate the report in the Submitted Pre-Approvals list.</p> <p>Note: The report status is displayed below the amount field.</p> <p>Statuses include:</p> <ul style="list-style-type: none"> <li>○ Pending</li> <li>○ Approved</li> <li>○ Partially Applied</li> <li>○ Used/Expired</li> </ul>	
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"> <li>Open</li> <li>PDF</li> <li>Tracking</li> <li>Recall</li> </ul>	
40.	<p>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.</p> <p><b>**Repeat steps 35-38 to return to the options screen**</b></p>	

Step	What to Do	Notes
41.	<p>Selecting PDF will display two options to select from:</p> <p>Full Report will create a PDF of the full report minus any attachments</p> <p>Full Report with Receipts will create a PDF of the full report and all attachments</p> <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 358 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> <p>Pre-Approvals can only be recalled prior to obtaining final approval</p> <p>Once in draft status, the expense owner or delegate can make any need adjustments to the Pre-Approval Report</p> <p>Submitting the Pre-Approval will restart the workflow approval process</p>	



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 mobile application interface. At the top, there is a navigation bar with a user icon on the right. Below this, a user profile card for 'Wu Shock' is displayed, showing 'Last login: 07/04/2019 at 11:15 AM'. Below the profile card are three menu items: 'Select Another User', 'Print New Invoice Cover', and 'Settings'. Below 'Settings' are 'System Administration' and 'Help'. At the bottom of the screen, there is a 'Logout' button. A red arrow points to the user icon in the top right, and a yellow arrow points to the 'Logout' button at the bottom.
45.	Complete	