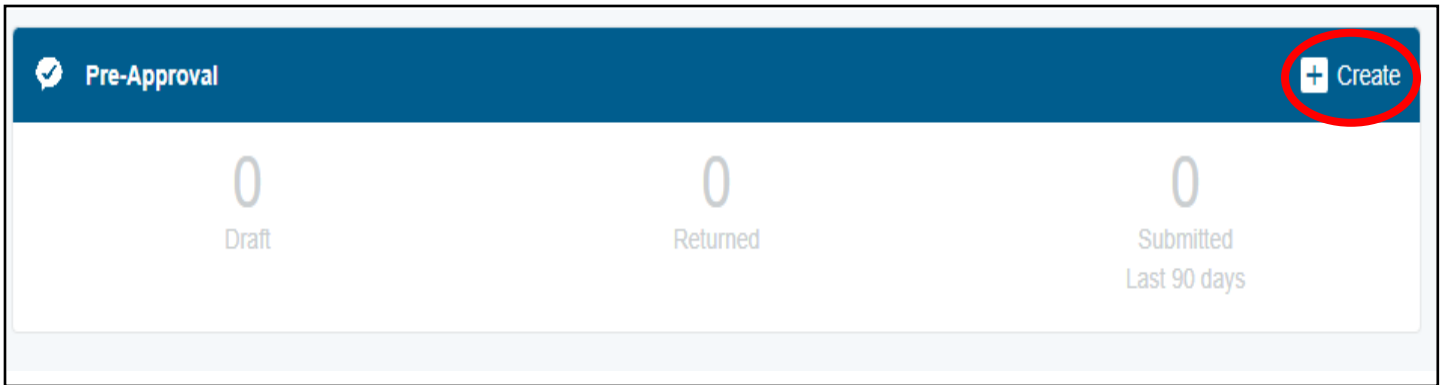


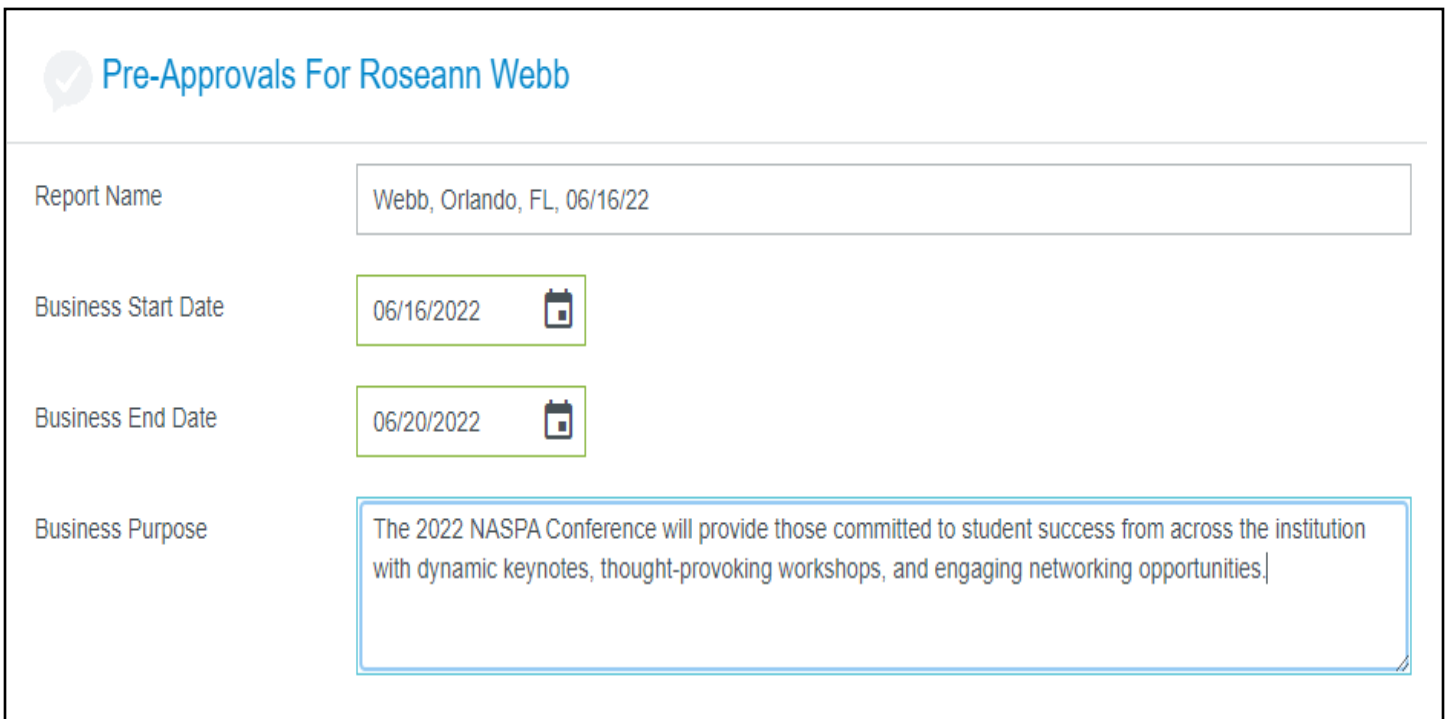
Create a Pre-Approval Report for Travel

1. Click “Create” in the Pre-Approval header row.



The screenshot shows the top section of a web application. A dark blue header bar contains a white checkmark icon and the text "Pre-Approval" on the left, and a white plus sign icon followed by the text "Create" on the right. The "Create" button is circled in red. Below the header, a white summary area displays three statistics: "Draft" with a large "0", "Returned" with a large "0", and "Submitted Last 90 days" with a large "0".

2. Complete the Pre-Approval form – Trip Name, Start/End date, and Business Purpose
 - a. Trip Name – “Last Name, Destination, Departure Date”
 - i. Example: Webb, Orlando, FL, 06/16/22



The screenshot shows a form titled "Pre-Approvals For Roseann Webb". The form has four main sections:

- Report Name:** A text input field containing "Webb, Orlando, FL, 06/16/22".
- Business Start Date:** A date input field containing "06/16/2022" with a calendar icon to its right.
- Business End Date:** A date input field containing "06/20/2022" with a calendar icon to its right.
- Business Purpose:** A text area containing the text: "The 2022 NASPA Conference will provide those committed to student success from across the institution with dynamic keynotes, thought-provoking workshops, and engaging networking opportunities."

3. Continue with Travel Type, Number of people attending, Destination, etc.

Travel Type	<input type="text" value="Out of State"/>
Report Type	<input type="text" value="University Business"/>
Number of traveler(s)?	<input type="text" value="Individual Travel"/>
Destination	<input type="text" value="Orlando, FL - 32801"/>
Student(s) Traveling?	<input type="text" value="No"/>
No Cost to ASU	<input type="checkbox"/>
Will there be personal time during this trip?	<input type="checkbox"/>
<input type="checkbox"/> Is this expense for a prospective employee?	
<input type="text" value="I understand that I should keep all receipts for auditing purposes."/>	
<input type="text" value="Check with Financial Manager to find funding allocation for this trip."/>	

4. Finish the form by designating the funds allocated for the trip. You can enter the FOAPAL or the name of the account, and a list will appear to select the correct fund.

Allocations

0100-60105-6020 IT Technology Services
General Institutional

5. If the trip is being funded from multiple funding sources, click “Add Allocation” to add those accounts and specify the percentages to split the funds.

Allocations

 ←


Allocations			
		Split Equally	Clear Splits
×	0100-60105-6020 IT Technology Services General Institutional	50.00 %	0.00
×	0115-60601-1040 Info Technology Distance Education Other Instructional & Departmental	50.00 %	0.00
		100.00 %	0.00

6. Click “Save” at the top of the form when you have completed all of the items in the Pre-Approval form.

Cancel Save


✓ Pre-Approvals For Roseann Webb

Report Name Webb, Orlando, FL, 06/16/22




7. Once saved, the “Add Pre-Approval Types” page will appear for you to enter travel estimate details based on the expenses you expect to incur. If a tile has an arrow that signifies there are sub-categories for that expense type.


Add Pre-Approval Types




AIRFARE




GROUND TRANSPORTATION




LODGING




MEALS



REGISTRATION



ATHLETIC TOURNAMENT
ENTRY/TICKETS



MISCELLANEOUS

8. For each expense, click “Save” and the travel estimate will appear on the left hand side of your pre-approval report screen.

Cancel Save

Airfare

Estimated Amount 600.00 USD

Additional Comments
Optional This is flying American Airlines from San Angelo - Dallas - Orlando.

Paid By Pre Pay on BTA (Business Travel Account)

GL_ACCT 7111

Pre-Approvals For Roseann Webb

Webb, Orlando, FL, 06/16/22

0 Comments 0 Attachments

EXPENSE	ESTIMATED
Airfare	600.00 USD
Lodging	536.00 USD
Meals	120.00 USD
Registration	500.00 USD

9. After entering all of the travel expense estimates, click “Submit”.

PA Report ID QA0001267021 Total Estimated Amount 1,756.00 USD Submit

10. Review the Pre-Approval Certification statement and click “Submit”.

Submit Preapproval

I hereby certify that these estimated expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes. I understand that I should keep all receipts for ease of Expense Reporting.

- 11. If an error message appears, correct the error and repeat until no error messages appear.
- 12. The Pre-Approval will appear in the left-hand side of the screen.



☰ eWallet

☰ Expenses + Create

☑ Pre-Approval + Create

0 Draft	0 Returned	0 Submitted Last 90 Days
0 Draft	0 Returned	➔ 1 Submitted Last 90 days

- 13. You will receive an email notification when the Pre-Approval has been approved or rejected.

E

Thu 8/11/2022 9:17 AM

expense-noreply-qa@chromefile.com

Chrome River Pre-Approval Request Approved

To ● Rosie Webb

NO ACTION REQUIRED
Chrome River

The following Pre-Approval Request has been approved.

Pre-Approval Request For	Roseann Webb
Report Name	Webb, Orlando, FL, 06/16/22
Pre-Approval ID	QA00-0126-7021
Submit Date	08/11/2022
Expense Dates	06/16/2022 - 06/20/2022
Total Expenses	1,756.00 USD