

Create Pre-Approval Report (Employee)

Create New Pre-Approval Report

1. Click the **+CREATE** button in the upper right corner of the Pre-Approval swim lane.



2. Enter the Header data:

Cancel Save

Pre-Approvals For [Redacted]

Report Name

Start Date 10/09/2024

End Date 10/09/2024

Number of Days 1

Business Purpose

Please type the Funding Source - Fund/Org/Program you would like to search for in the funding source box below. As you type, a drop down list of matching items will be displayed for selection.

Funding Source - Fund/Org/Program

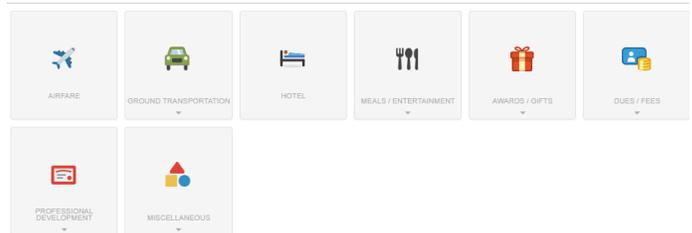
Search for Allocation

+ Add Funding Source - Fund/Org/Program

- **Report Name:** ??????
- **Start Date:** Click the calendar icon to select the appropriate start date.
- **End Date:** Click on the calendar icon to select the appropriate end date.
- **Number of Days:** Automatically defaults based on the start and end dates chosen.
- **Business Purpose:** Enter a clear, detailed business purpose for the travel event.
- **Funding Source - Fund/Org/Program:** Choose the appropriate funding source for the expense.

3. Click Save at the top right hand part of the screen to continue.
4. Select the specific expense tile you want to add to the Pre-Approval Report.

Add Pre-Approval Types



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

Cancel Save

Airfare

Estimated Amount 500.00 USD

Description Optional Airfare for trip.

Type of Travel Optional Domestic

- **Estimated Amount:** Enter the estimated amount for this expense type.
- **Description:** Provide any additional information about this expense.
- **Type of Travel:** Choose either Domestic or International depending on the travel type.

6. The expense will be added to the Pre-Approval Report and will be visible on the left side of the screen. The Add Pre-Approval Types page will appear on the right side of the screen.



7. Continue adding expenses to the report by selecting the appropriate expense tile, completing the expense form, and clicking save at the top right of the screen.

8. 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.

The screenshot shows a mobile application interface for a Pre-Approval Report. At the top, there is a blue header with a back arrow and the text "Pre-Approval For [redacted]". Below the header, the title "Quick Reference - Pre-Approval" is displayed. A table lists expenses with their estimated amounts:

EXPENSE	ESTIMATED
Airfare	500.00 USD
Hotel	300.00 USD
Business Meals	100.00 USD

At the bottom of the screen, a summary bar shows the "PA Report ID" as 010001347987 and the "Total Estimated Amount" as 900.00 USD. A green "Submit" button is located on the right side of this bar.

9. A submit confirmation will appear at the top of the right side of the screen.

The screenshot shows a confirmation screen titled "Submit Preapproval". It features a green header and a yellow background. A certification statement reads: "I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes." At the bottom right, there are two buttons: "Cancel" and "Submit".

- **Cancel:** Clicking cancel allows you to return to the Pre-Approval report to make any needed changes. You can choose to leave the report in draft status.
- **Submit:** Once you have read the certification, statement, click the Submit button to submit the Pre-Approval report into workflow for approvals.