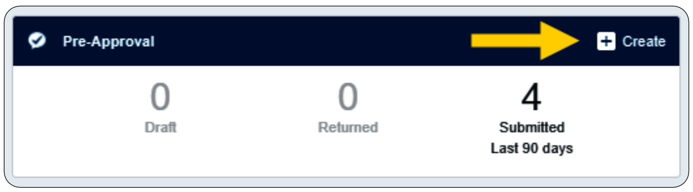
Lafayette College Quick Reference

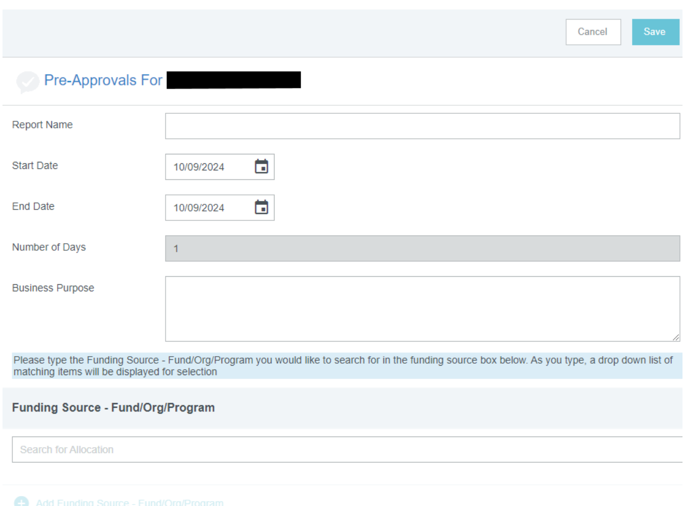
Create Pre-Approval Report (Employee)

Create New Pre-Approval Report

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

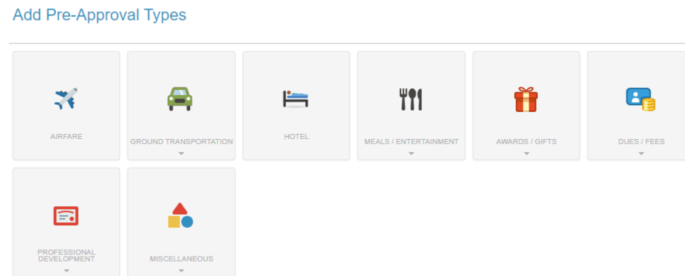


2. Enter the Header data:

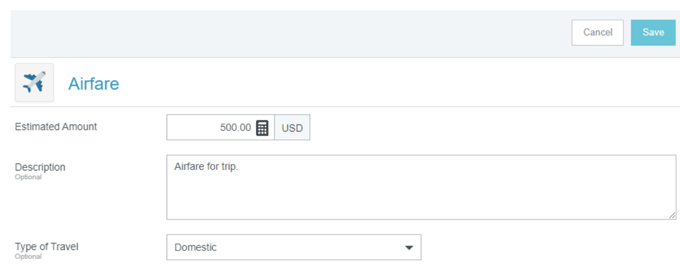


- **Report Name:** ?????
- **Start Date:** Click the calendar icon to select the appropriate start date.
- **End Date:** Click on the calendar icon to select the appropriate end date.
- **Number of Days:** Automatically defaults based on the start and end dates chosen.
- **Business Purpose:** Enter a 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.

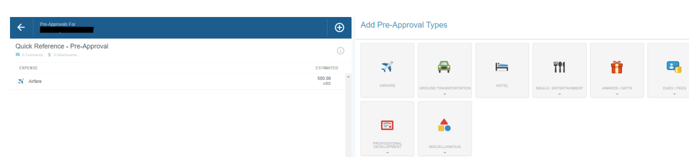


5. Complete the expense tile form and click Save at the top right side of the screen to continue.



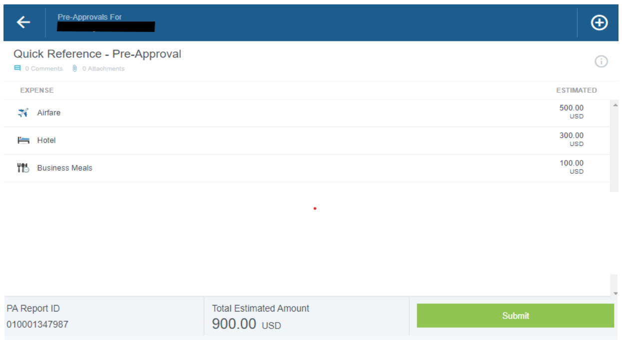
- **Estimated Amount:** Enter the estimated amount for this expense type.
- **Description:** Provide any additional information about this expense.
- **Type of Travel:** Choose either Domestic or International depending on the travel type.

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.

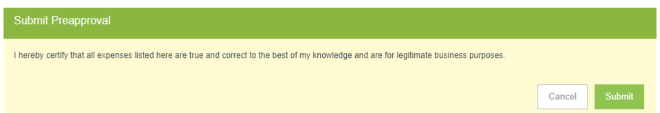


7. Continue adding expenses to the report by selecting the appropriate expense tile, completing the expense form, and clicking save at the top right of the screen.

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.



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



- **<u>Cancel:</u>** 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.
- **<u>Submit:</u>** Once you have read the certification, statement, click the Submit button to submit the Pre-Approval report into workflow for approvals.