

CHROME RIVER QUICK GUIDE- CREATING A PRE-APPROVAL REPORT

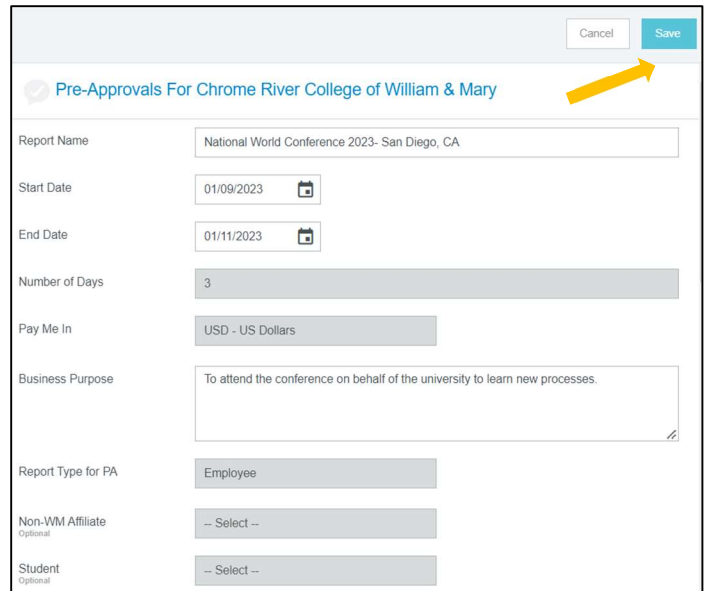
1. Click the + **Create** button on the Navigation Bar and select **New Pre-Approval** report from the dropdown menu.



2. Complete the pre-approval report header with the following:

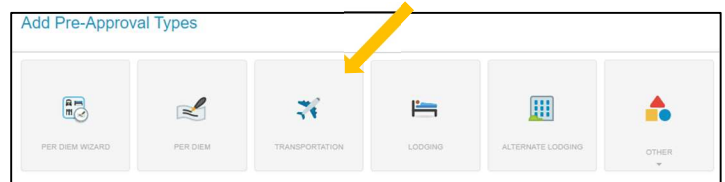
- **Report Name** – Provide a unique and descriptive name for the report
- **Start Date** – Click the calendar icon to select the date of departure for travel
- **End Date** – Click the calendar icon to select the date of return for travel
- **Number of Days** – This field will auto populate based on the dates entered
- **Business Purpose** – Enter a specific and clear university business purpose for the expense.
- **Report Type for PA** – Select Employee, Student, or Non-WM Affiliate to determine who will be paid for the expense. If Student or Non-WM Affiliate is chosen, please select the individual's Name and 93# in the appropriate drop-down box.
- **Travel Type** – Select **Domestic** or **International**. If Domestic or International are selected, you will be asked to enter the **Destination** (City, State for Domestic or City, Country for International). There can be up to 3 destinations completed. If more than 3 traveled, please add additional destinations in the comment box
- **Allocations** – Select the department index where the funding will be charged. To add more than one index, click + **Add Allocation**. (Note that for pre-approval reports, the Index is only specified on the header, not on the individual expenses on the report.)

After the report header has been fully completed, click **Save** in the upper right corner to continue.



ADD EXPENSES

3. Select an expense to add to the Pre-Approval report from the expense tiles. Tiles with a downward facing arrow at the bottom have additional expense tiles listed under them.



4. Complete the expense tile form and click **Save** in the upper right corner to continue.

CHROME RIVER QUICK GUIDE: CREATING A PRE-APPROVAL REPORT

Transportation

Estimated Amount: 0.00 USD

Description: Optional

Cancel Save

8. A submit confirmation will appear at the top right of the screen. Click **Cancel** to return to the report and make any changes. Click **Submit** to submit the pre-approval report to the approval workflow.

Submit Preapproval

I hereby certify that the expenses listed represent a true statement of actual travel expenses incurred in accordance with all applicable William & Mary Policy and Procedures. All expenses listed are for legitimate business purposes and in support of the VM mission and goals.

Cancel Submit

5. The expense will be added to your Pre-Approval report and visible on the report summary to the left. The expense tiles will appear on the right.

Pre-Approvals For Chrome River College of William & Mary

National World Conference 2023- San Diego, CA

EXPENSE	ESTIMATED
Transportation	500.00 USD

PER DIEM WICARD PER DIEM TRANSPORTATION LODGING ALTERNATE LODG OTHER

6. Continue adding expenses to your report by selecting the appropriate expense tile, completing the expense form, and clicking **Save** in the upper right corner to add to the report.

SUBMIT

7. Once you have finished adding all expenses to your Pre-Approval report, click the green **Submit** button at the bottom of the report summary.

Pre-Approvals For Chrome River College of William & Mary

National World Conference 2023- San Diego, CA

EXPENSE	ESTIMATED
Transportation	500.00 USD
Conference Registration	595.00 USD
Meals	55.50 USD
Meals	74.00 USD
Meals	55.50 USD
Lodging	500.00 USD

PA Report ID: QA0001361195 Total Estimated Amount: 1,780.00 USD

Submit