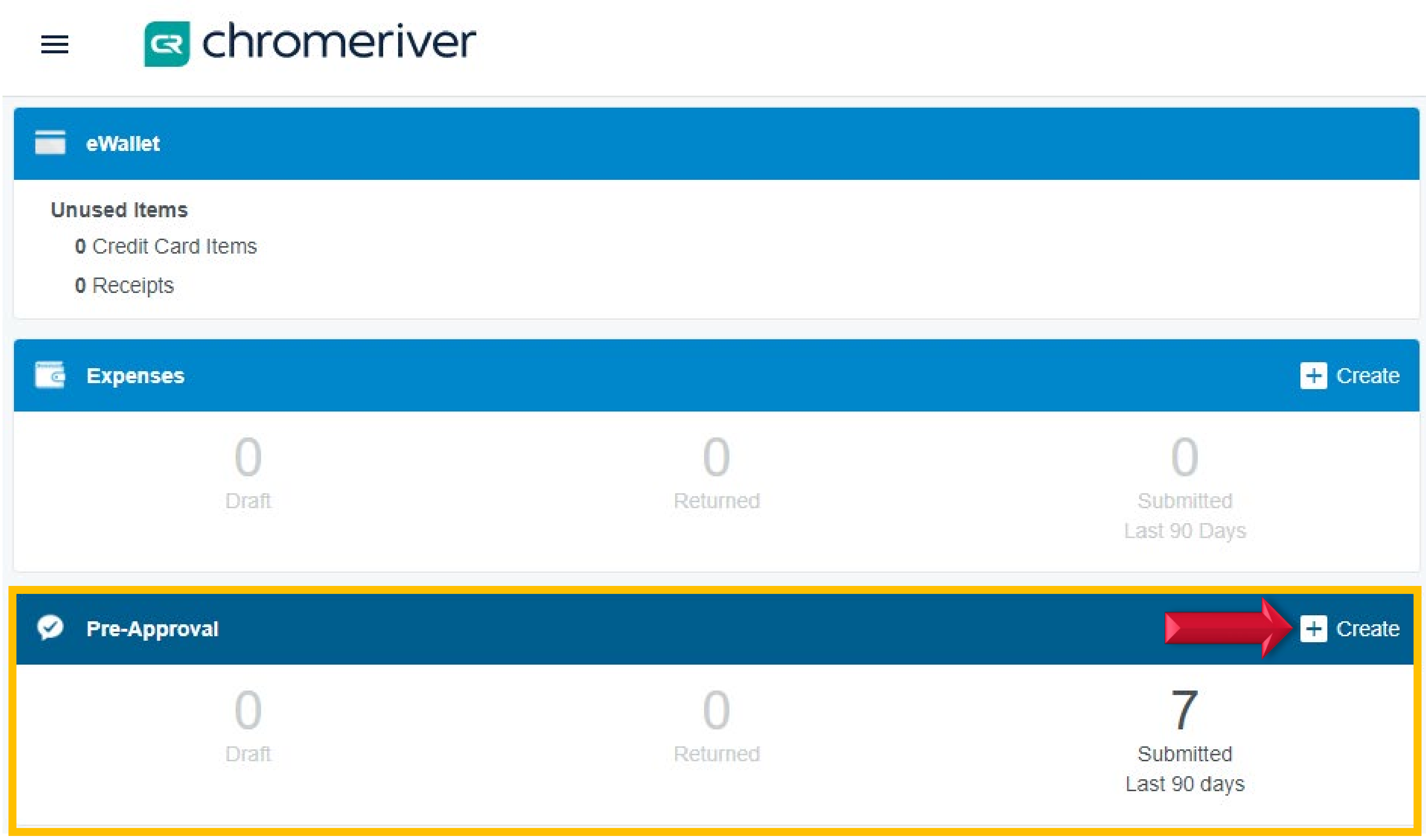
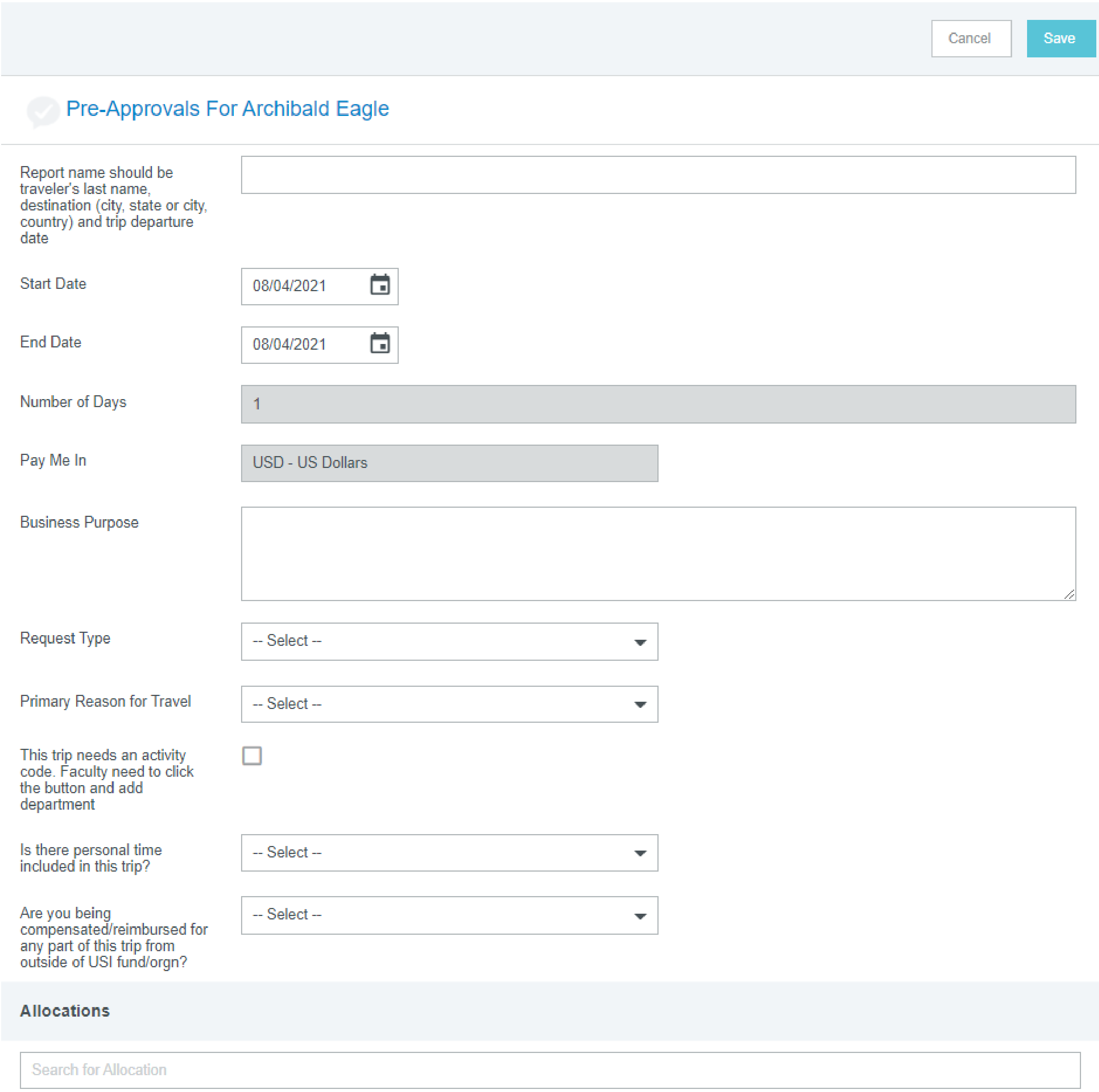
Creating and Submitting a Standing Pre-Approval

Step 1: Complete the Standing Pre-Approval Header

Click **+Create**, in the top right-hand corner of the Pre-Approval ribbon.



Complete the **Pre-Approval Header**.



Report Name

Enter your last name, travel item (e.g., Car Rental/Fuel or Mileage), and either Spring 20xx or Fall 20xx. No punctuation. Maximum of 45 characters allowed, including spaces.

- Example: Smith Car Rental/Fuel Spring 2021
- Example: Williams In-State Mileage Fall 2021

Start Date and End Date

Fall: July 1 – December 31

- Fall Standing Pre-Approvals are to be created (this includes creating drafts) on or after July 1. Fall Standing Pre-Approvals created and/or submitted prior to July 1 will be returned.

Spring: January 1 – June 15*

- Spring Standing Pre-Approvals should be created on or after January 1.
- The Spring 20xx Standing Pre-Approval end date must match the closing date of the May-June credit card billing cycle. Typically, the closing date is the 15th. However, if the 15th falls on a weekend day, then the closing date will differ. Contact Travel Procurement with questions about trip end dates for Standing Pre-Approvals.

Business Purpose

Provide details that answer what and why travel is being supported by the university:

- Example: Travel to clinical sites in Princeton, IN and Jasper, IN for student observations.
- Example: Fuel purchases for assigned department vehicles

Request Type

Select Employee Travel or Student Travel.

Travel Type

Select the option that best fits your travel type.

- If you will have both in-state and out-of-state travel items, then create separate Standing Pre-Approvals, one for each (e.g., Doe Mileage In-State Fall 2021 and Doe Mileage Out-of-State Fall 2021).

Primary Reason for Travel

This statement will appear for several travel types but not all. When applicable, choose the most relevant option available. When Other is selected, enter a detailed response in the text box provided.

This trip needs an activity code

If an activity code is needed for the trip expenses, then check the box and select the applicable code from the Activity Code drop-down list.

- Faculty need to check this box and select their department from the drop-down list. If your department is not listed, then select the department in which your Chair resides.

Is there personal time included in this trip?

Select **Yes** or **No**.

- If Yes, then enter the dates in the text box labeled *Please list the dates of personal time*.

Are you being compensated/reimbursed for any part of this trip from outside of a USI fund/org?

Select **Yes** or **No**.

- If Yes, then enter in the text box labeled **Outside Fund Details**, the source and amount of funding or enter the source and list the expenses being covered.
  - Example: ZYX Organization is giving me $250 to cover registration
  - Example: CBA Organization is paying for my lodging

Allocations

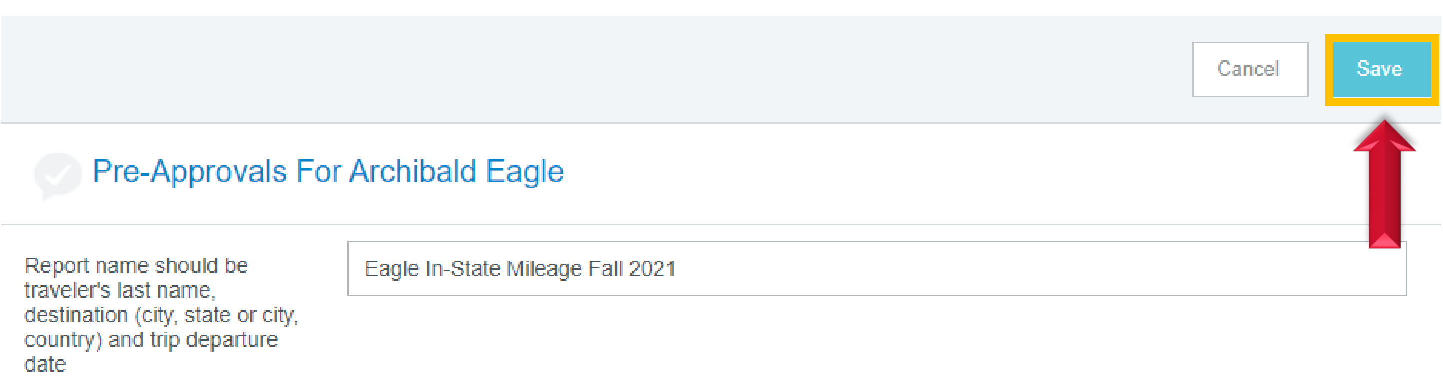
Select the funding source for the trip.

- *Tip*: To narrow the search list of Fund Orgs, type the index number code or the department name.
- *Tip*: For multiple Fund Org allocations, only enter **one** at this stage. An opportunity will be available to add the additional Fund Orgs in Step 4 of this guide.

Important: Review **ALL** the information on the Pre-Approval Header:

Although changes may be made to most areas of the Pre-Approval Header, after it has been saved, a change **cannot** be made to the Request or Travel Types. If an error has been saved for either the Request or Travel Types, then a new Pre-Approval will need to be created, and the incorrect one will need to be deleted.

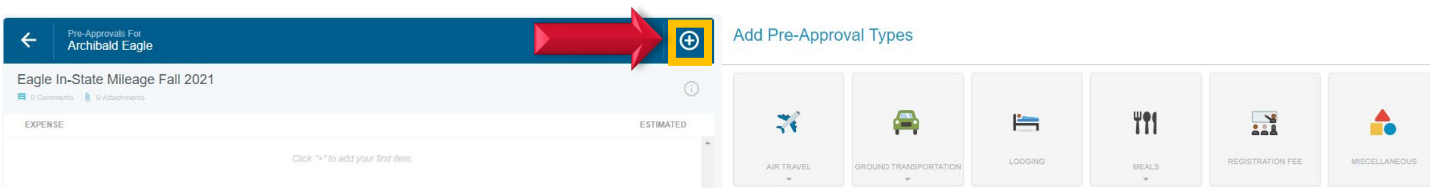
After confirming the information is correct, click **Save**.



Step 2: Add Expense Estimates to the Standing Pre-Approval

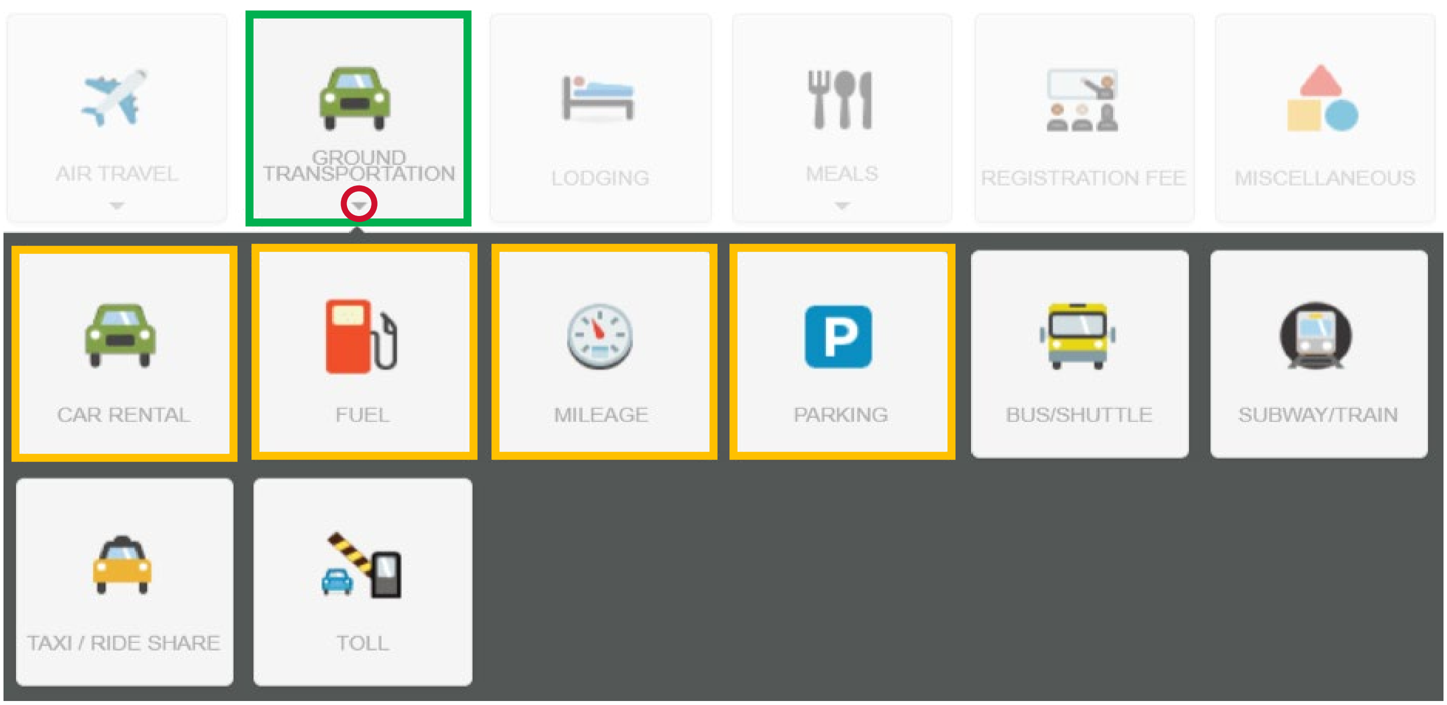
Below is the screen that will appear after the Standing Pre-Approval Header has been populated and saved. This is called the Pre-Approval Report.

- *Tip*: If the screen with Pre-Approval Types is not visible, then click on the circle that has a plus sign inside it, and it will reappear.



For most of the Standing Pre-Approvals, the most used Pre-Approval types will be found under the **Ground Transportation** mosaic (e.g., Car Rental, Fuel, Mileage, and Parking). To add one of these Pre-Approval types, click the respective sub-mosaic tile and enter the required information.

- *Tip*: Cushion the trip estimates as prices often fluctuate (e.g., fuel prices).
- For the Car Rental mosaic, you must choose a car rental agency (preferably Enterprise or National since USI has negotiated discounts with these vendors). Do **not** select Other.

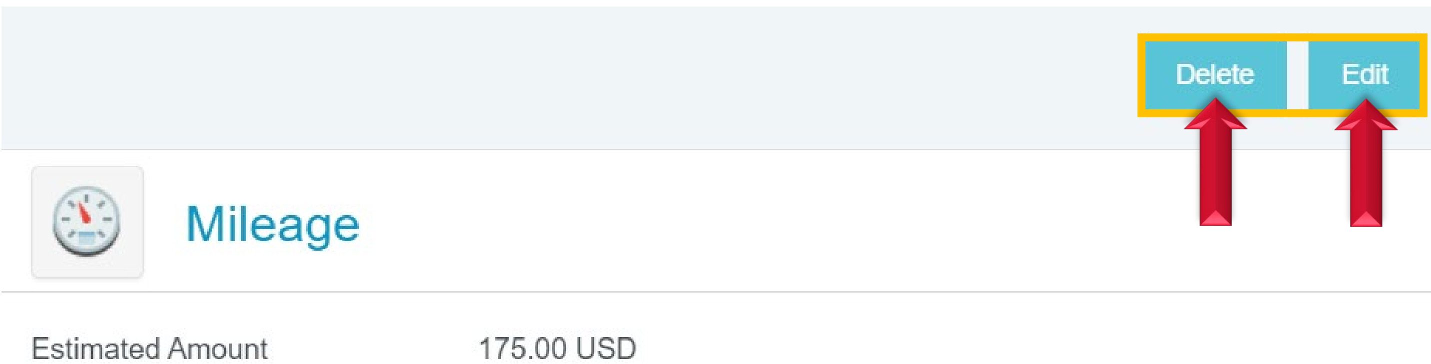


Delete or Edit a Pre-Approval Type

Click the **Pre-Approval Type** needing to be deleted or edited, from the left-hand side.

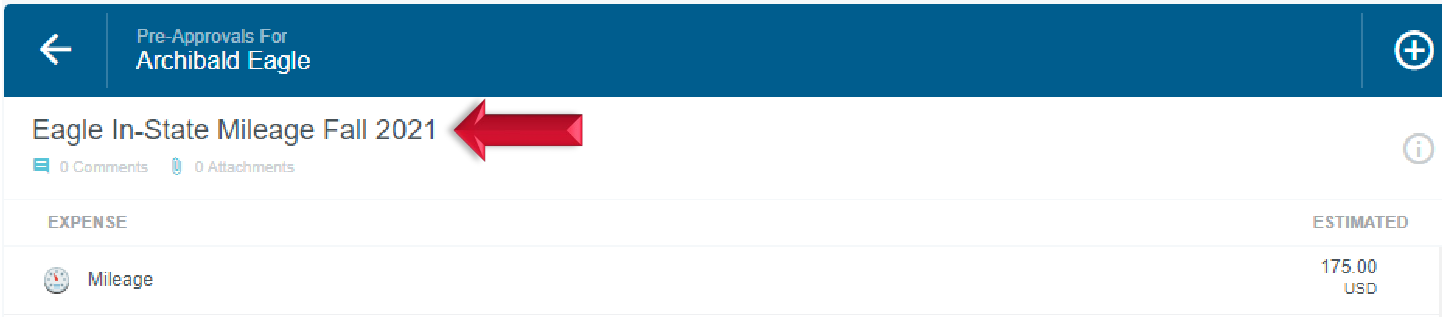
Delete will remove the Pre-Approval type and **Edit** will allow changes to the Pre-Approval type.

- View the guide *Deleting a Pre-Approval*, if a whole Pre-Approval needs to be deleted.

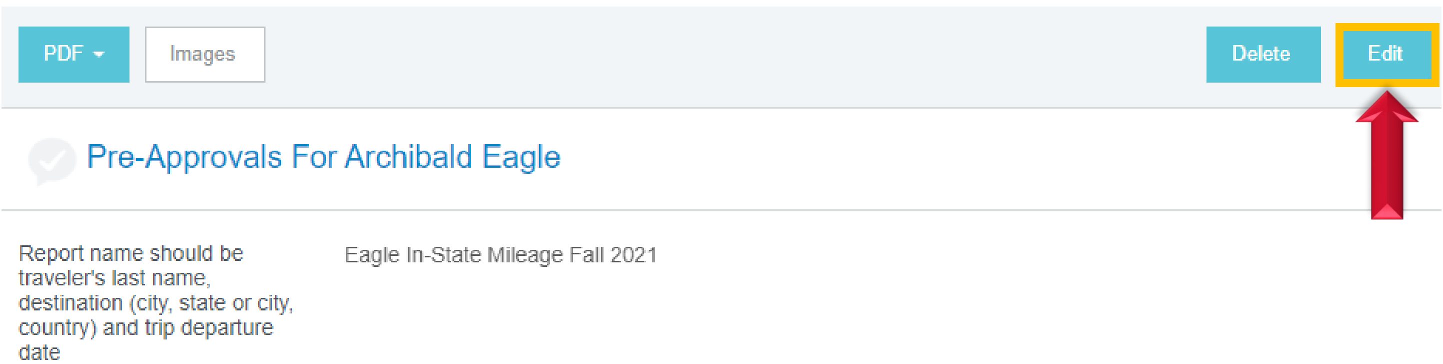


Step 3: Add Comments and Attachments

To add Comments and Attachments, click the **Report Description** on the left-hand side.



Click **Edit**.



Scroll down inside the Pre-Approval Report until the **Comments** and **Attachments** sections are in view.

Comments

Use this area to:

- Communicate information to financial manager(s), or others, in the approval routing, if applicable.
- Provide other information that may be helpful.

Important:

- Comments are visible to **<u>ALL</u>** who have access to the Pre-Approval report and will appear on the approval email notifications. Also, comments are permanent, and once posted, they cannot be deleted.

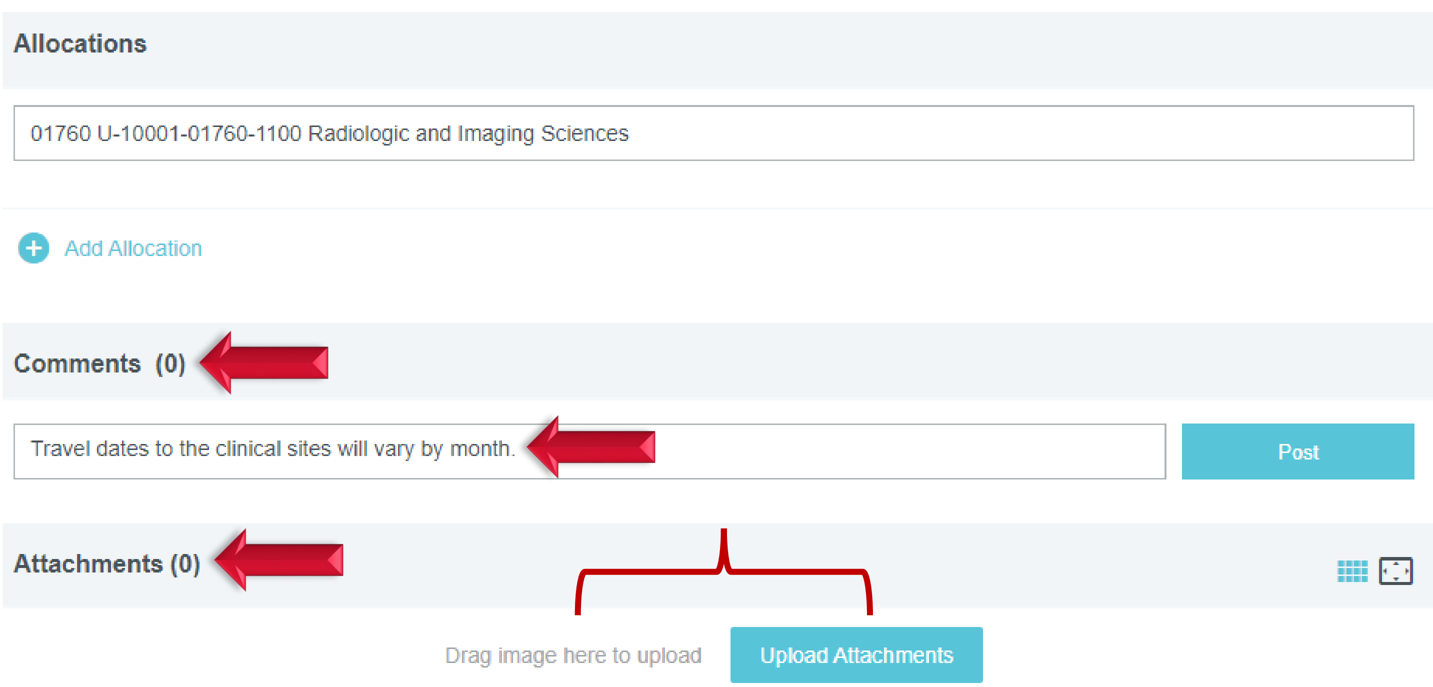
Attachments

Use this area to upload:

- Meeting schedules, letter of invitation, etc.
- Documents for internal communication such as class coverage schedule.
  - *Tip*: A document, with information about the purpose and dates of the event/trip, must be uploaded. If no document is uploaded, then Travel Procurement may return the Pre-Approval to you so one can be uploaded to it.

Note:

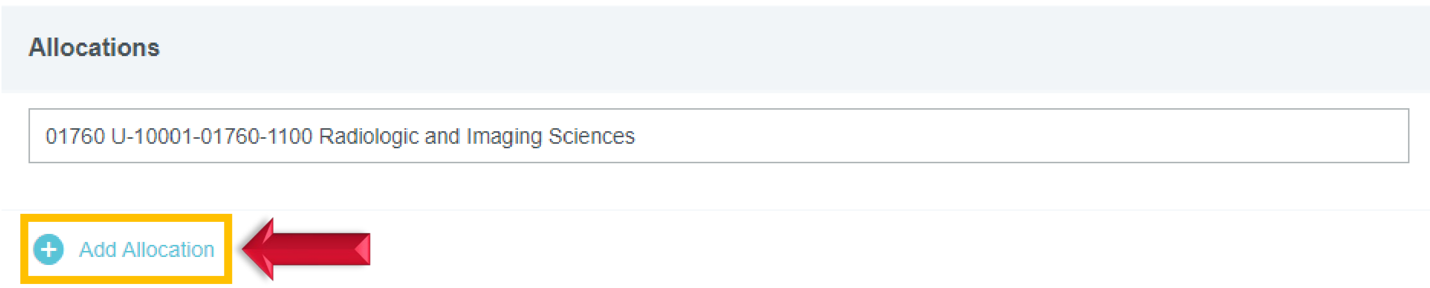
- Chrome River can only attach documents of the following formats: PDF, PNG, and JPEG.
- Documents can be dragged to the elected area or added via the **Upload Attachments** button.
- Attachments may only be removed if deleted **<u>BEFORE</u>** the Pre-Approval report is submitted.
  - *Tip*: To remove an attachment, click the file in the Attachments section. A window will appear on the left showing the document. Find and click the red trashcan in the upper left-hand corner to delete it.



Step 4: Add Additional Fund Orgs

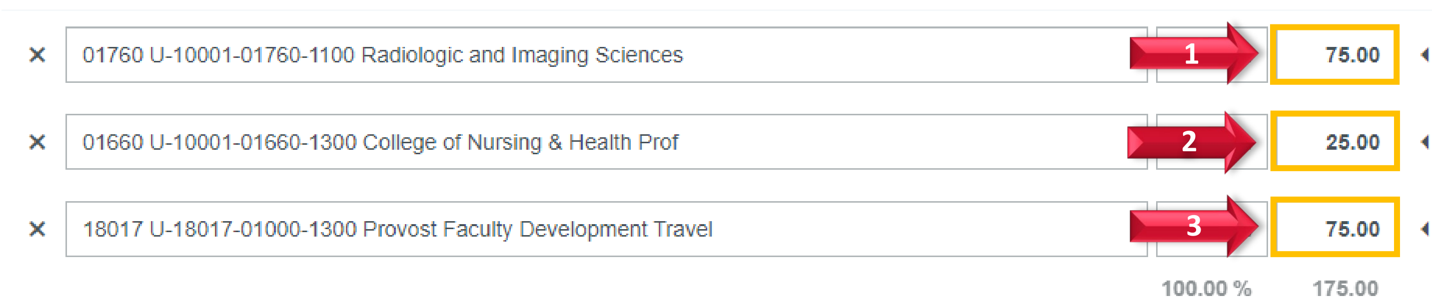
If only one Fund Org is needed for the trip, then click **Save** in the upper right-hand corner, and go directly to Step 5.

To add another Fund Org, scroll to the Allocations section and click **Add Allocation**. Then select the funding source for the trip.

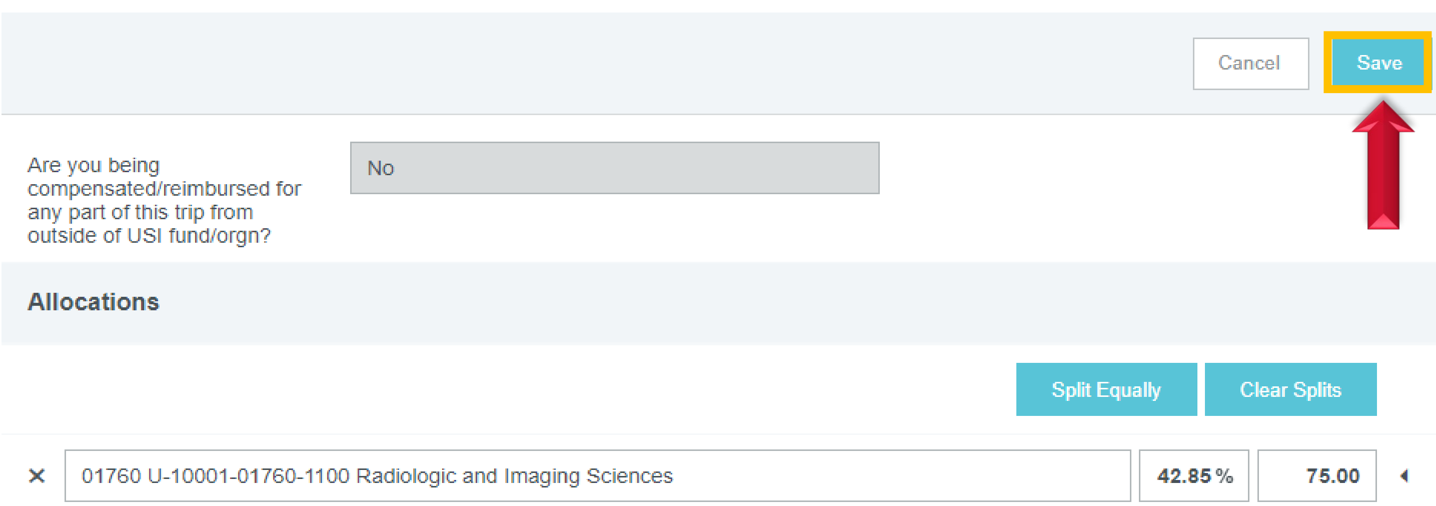


Continue to add Fund Orgs as needed. Then adjust, from the first listed Fund Org to the last (top down), the amounts being funded by each Fund Orgs.

- Example: If receiving $75 from Dept (1), $25 from College (2), and $75 from Provost (3), then manually type each of the respective amounts in the appropriate dollar column (last column).
  - Ignore the percentages column (middle column)

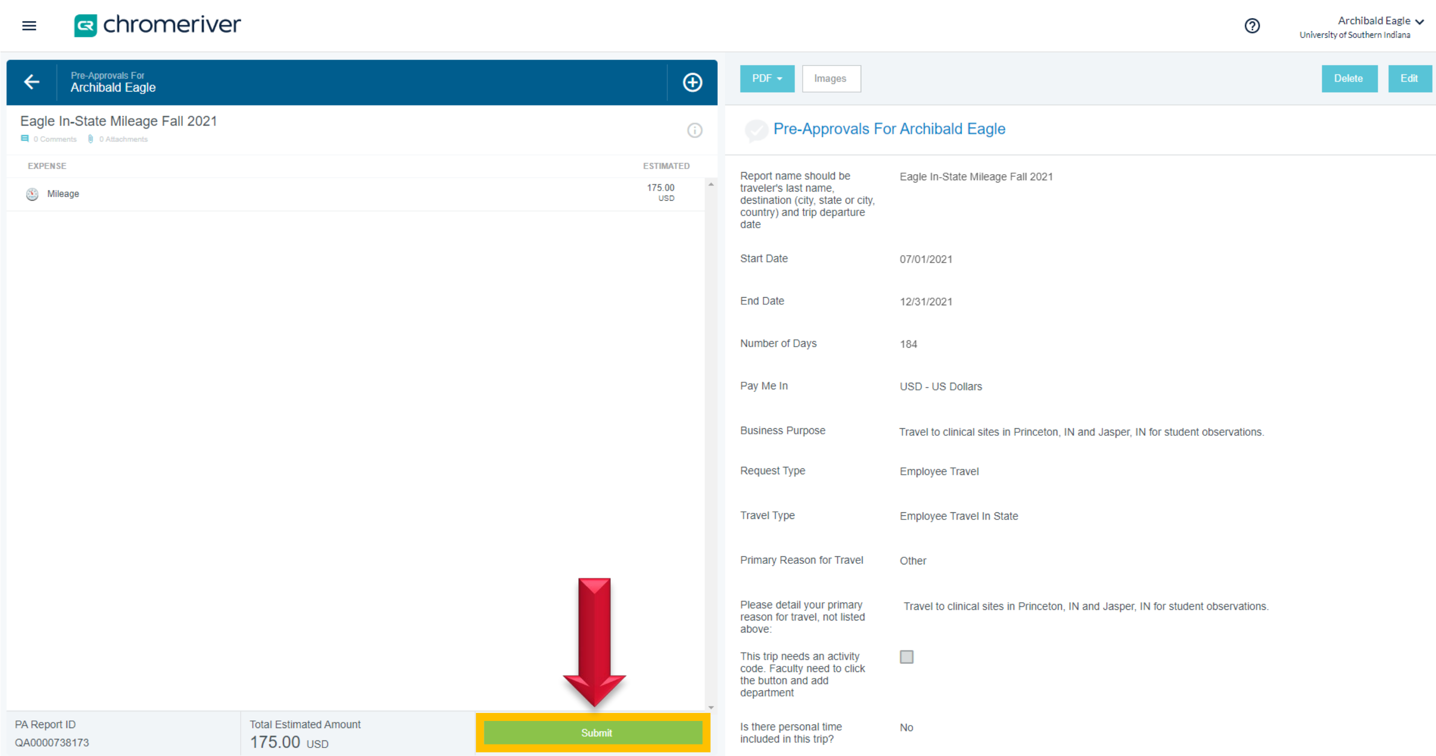


After Comments, Attachments, and Allocations have been added, click **Save**.



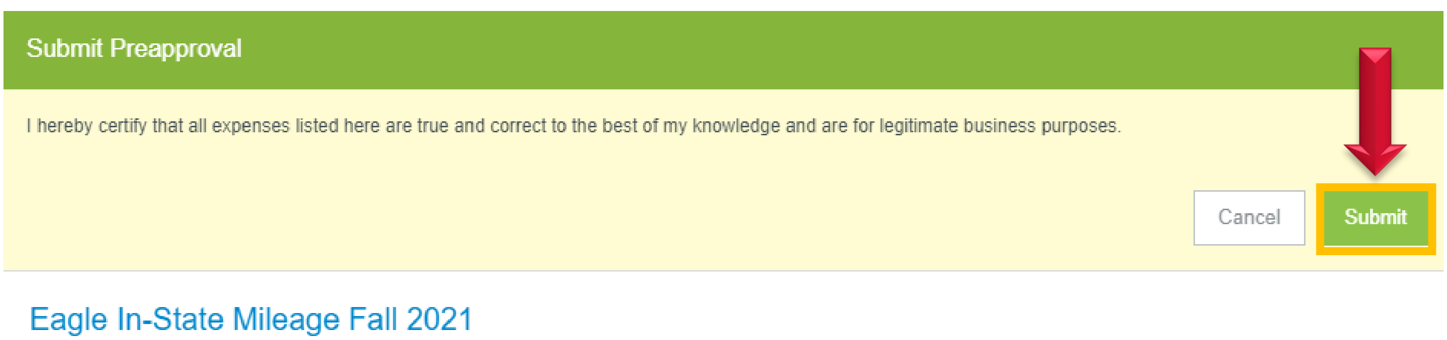
Step 5: Submit the Pre-Approval

Click **Submit**.



An opportunity will be given to perform a final review of all the Pre-Approval trip information.

After the final review, click **Submit**.



The message below will briefly appear, at the top of the screen, if the report was submitted successfully.

- View the guide *Tracking a Pre-Approval* to view the Standing Pre-Approval's current approval status.