Editing a Pre-Approval
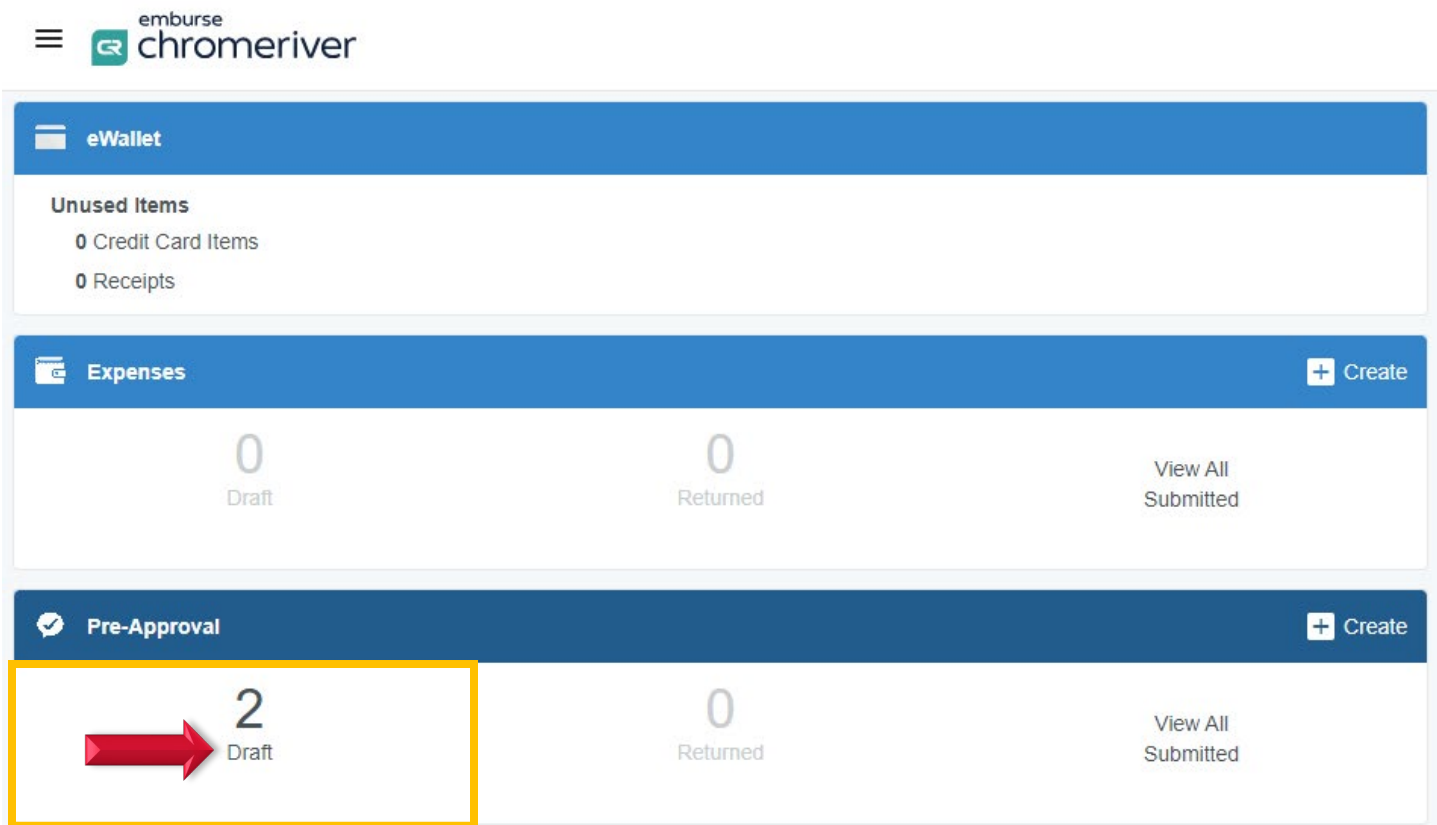
Step 1: Select the Pre-Approval

In the Pre-Approval ribbon, on the Home Screen, click **Draft**.

Select the Pre-Approval that needs editing.

Step 2: Edit the Draft Pre-Approval

The Pre-Approval Header will appear to the right. Click **Open**.

- View the guide *Editing a Returned Pre-Approval* if a Pre-Approval was returned.

Report Owner	Archibald Eagle
Created By	Patricia Tieken
Create Date	03/07/2024
Pay Me Amount	1,983.00 USD
PA Report ID	QA0001308449
From Date	09/19/2024
To Date	09/22/2024
Business Purpose	I am attending the CBA Conference to learn how ZYX Software works for the department.

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The Pre-Approval Report appears. You can Add a Pre-Approval Type, Delete or Edit a Pre-Approval Type, Delete/Add Fund Orgs, Add Comments, and/or Add Attachments.

Add a Pre-Approval Type

On the left-hand side of the Pre-Approval Report, click on the white circle with a white plus sign inside it (inside the dark-blue ribbon).
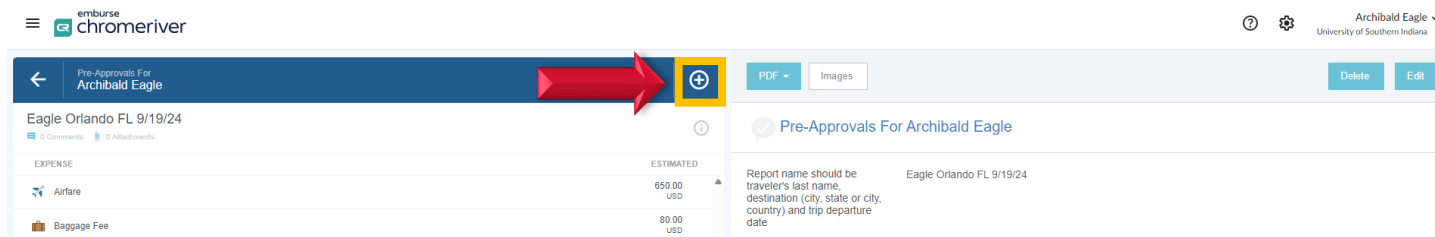
There are six Pre-Approval types. To add a Pre-Approval type, click a tile and enter the required information.
- Tiles with a gray triangle (circled in red) indicate additional options within those tiles. To see those selections, click the tile.
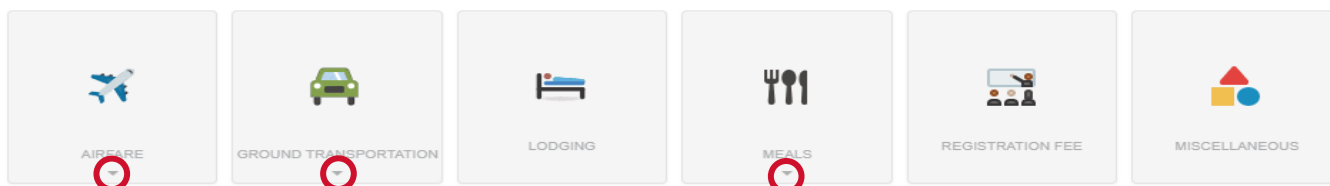
Delete or Edit a Pre-Approval Type

Click the **Pre-Approval Type** from the left-hand side, which needs deleting or editing.
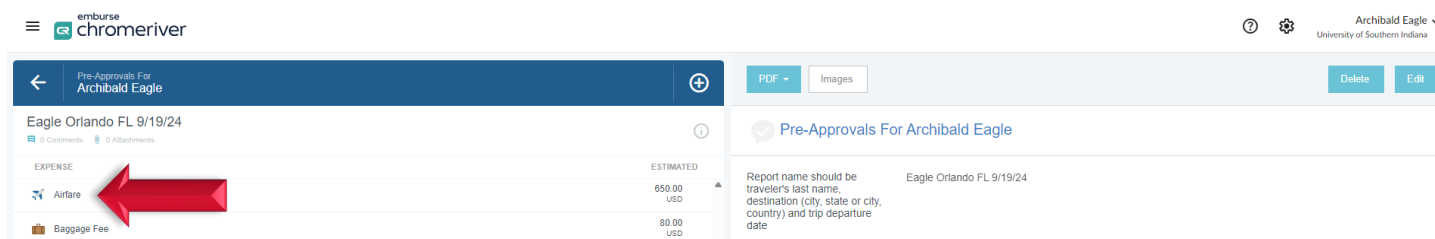
Delete will remove the Pre-Approval type, and **Edit** will allow changes to the Pre-Approval type.
- View the guide *Deleting a Pre-Approval t*o delete a whole Pre-Approval.

Delete/Add Fund Orgs

To delete or add a Fund Org, click the **Edit** button in the upper right-hand corner of the Pre-Approval Report. Then, **scroll down** to the **Allocations** section.

To delete a Fund Org, click the "**x**" next to the Fund Org.
To add a Fund Org, click **Add Allocation**.
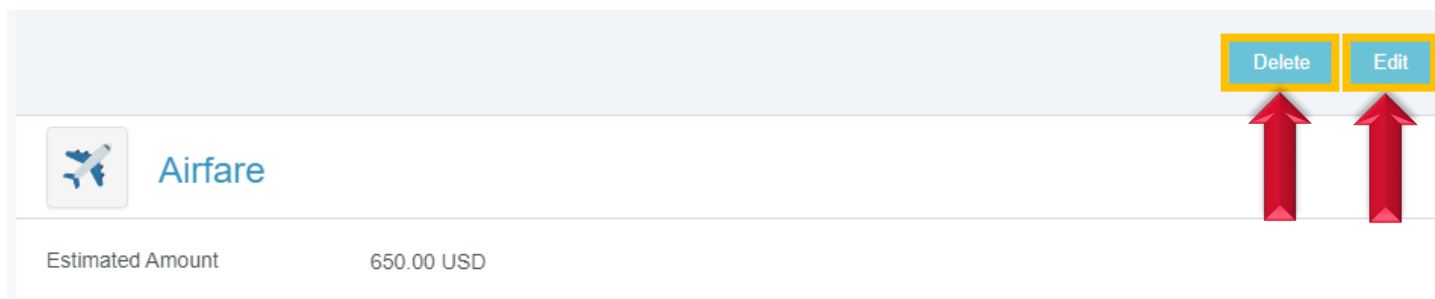

Continue deleting or adding Fund Organizations as needed. Then, adjust the dollar amounts (last column) from the first listed Fund Organization to the last (top-down).

- Example: If receiving $538 from Dept (1), $400 from College (2), and $500 from Provost (3), then manually type each of the respective amounts in the appropriate dollar column (last column).
    - *Tip*: Ignore the percentages column (middle column).

After the necessary edits have been made, click **Save**.

		Cancel	Save

Are you being compensated/reimbursed for any part of this trip from outside of USI fund/orgn?   No

Allocations

		Split Equally	Clear Splits

		%	Amount
✕	01330 U-10001-01330-1100 Economics and Marketing	37.41 %	538.00
✕	01300 U-10001-01300-1300 Romain College of Business	27.82 %	400.00
✕	18017 U-18017-01000-1300 Provost Faculty Development Travel	34.77 %	500.00
		100.00 %	1,438.00

Add Comments

To add Comments, scroll down inside the Pre-Approval Report (right-hand side) until the **Comments** section is in view.

- If the Pre-Approval Report is not visible, then click the **Report Description** on the left.

← Pre-Approvals For
Archibald Eagle   ⊕

Eagle Orlando FL 9/19/24   ⬅   ⓘ
📧 0 Comments 📎 0 Attachments

Comments

Use this area to:

- Enter web link for conference/event information, if applicable.
- Provide other travelers' names or number of travelers, especially if traveling with students.
- Communicate information to supervisor, chair, dean, etc.
- Provide other information that may be helpful.

Important:

- Comments are visible to __ALL__ who can access the Pre-Approval report and will appear on the approval email notifications. They are also permanent and once posted, they cannot be deleted.

Add Attachments

To add Attachments, scroll down inside the Pre-Approval Report (right-hand side) until the **Attachments** section appears.

- If the Pre-Approval Report is not visible, click the **Report Description** on the left side (see the above screenshot in the **Add Comments** section).
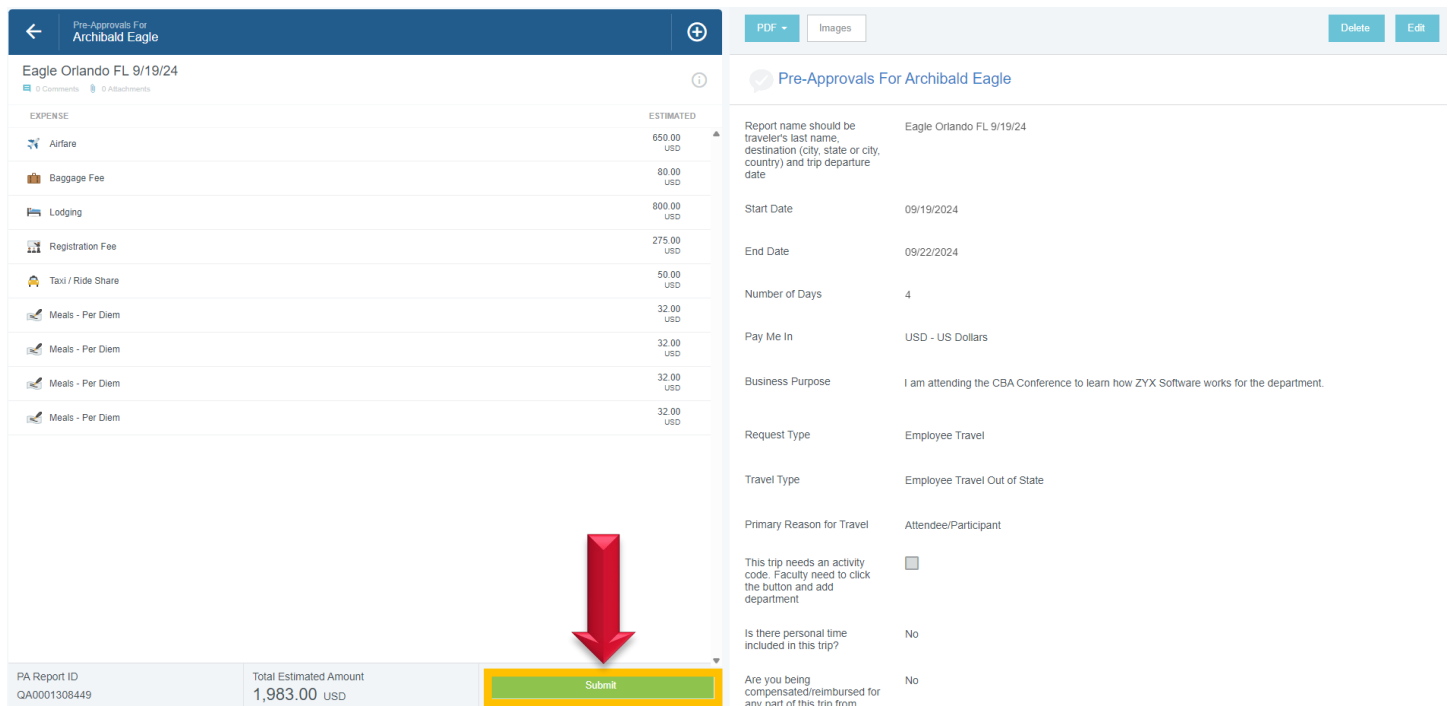
Attachments

Use this area to upload:

- Conference schedule, research trip itinerary, recruitment travel agenda, letter of invitation, etc.
- Documents for internal communication, such as class coverage schedule.

Note:

- Chrome River can only attach documents in 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 **BEFORE** submitting the Pre-Approval report.
  - *Tip*: Click the file in the Attachments section to remove an attachment. 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 3: 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**.

Submit Preapproval

I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.

Cancel   Submit

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Report Owner   Archibald Eagle

If the report was submitted successfully, then the message below will briefly appear at the top of the screen.
- View the guide *Tracking a Pre-Approval* to view the Pre-Approval's current approval status.

Report submitted   ✕