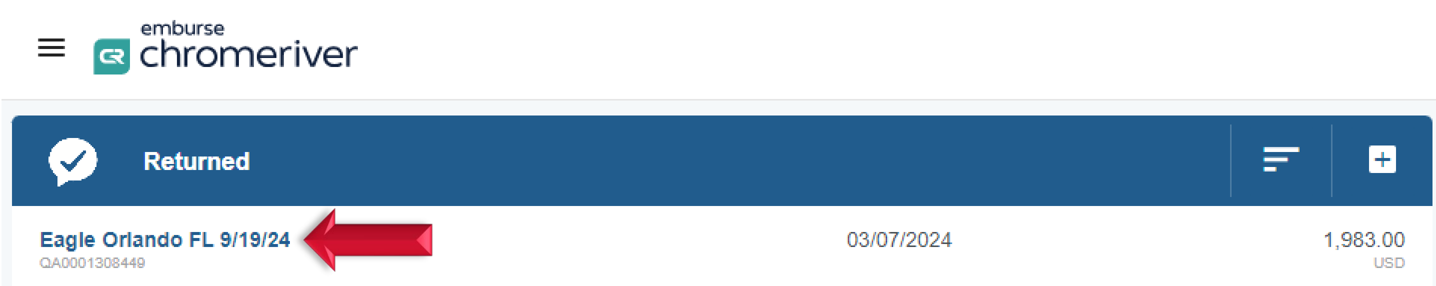
Editing a Returned Pre-Approval

Step 1: Select the Returned Pre-Approval

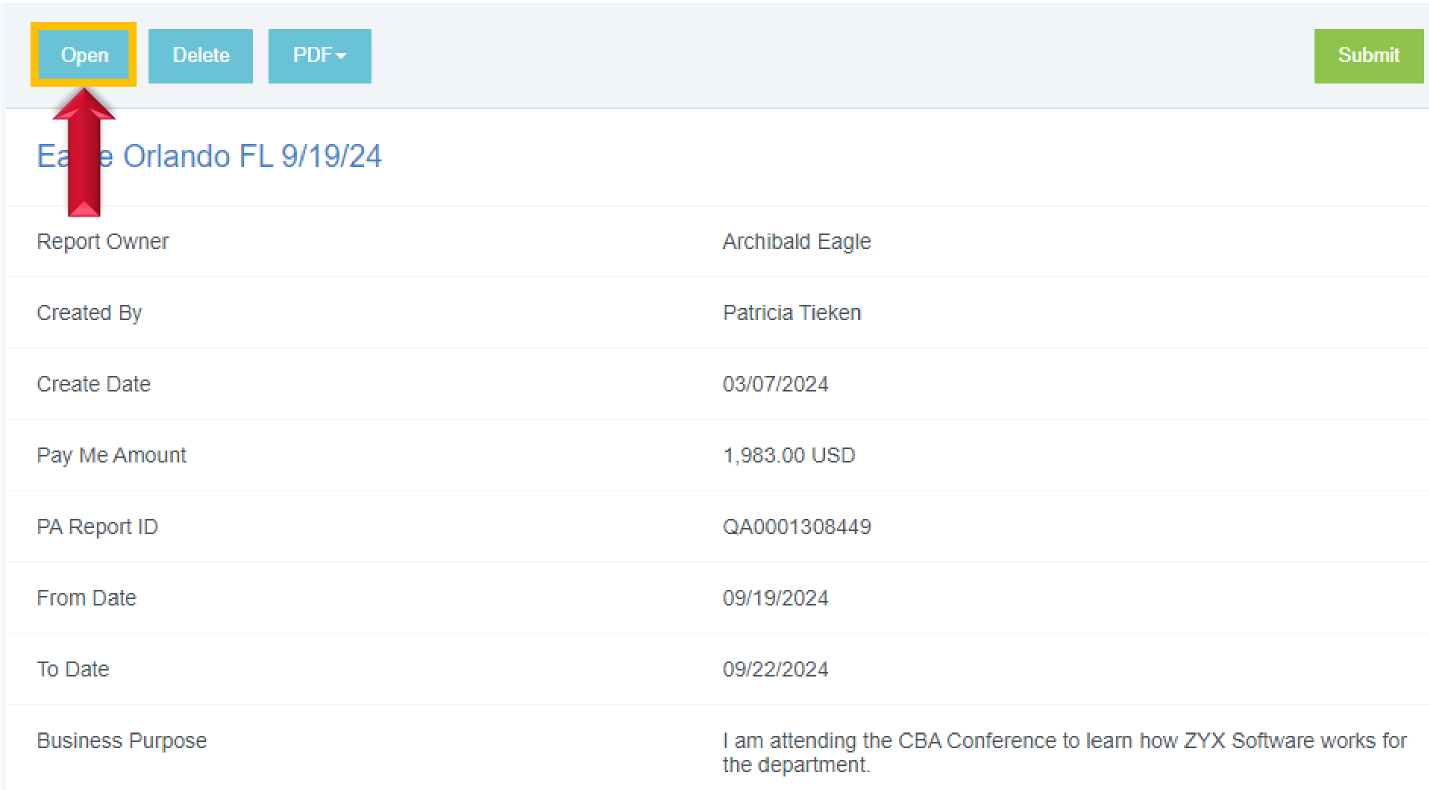
In the Pre-Approval ribbon, on the Home Screen, click **Returned**.

Select the Pre-Approval that was returned.



Step 2: Edit the Returned Pre-Approval

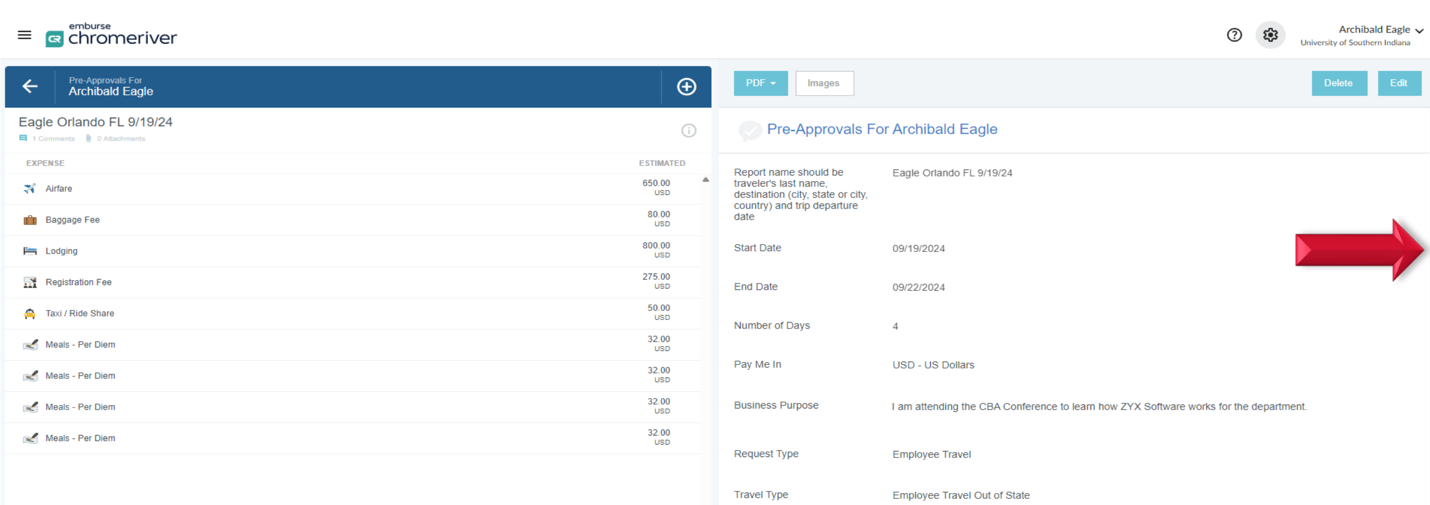
The Pre-Approval Header will appear to the right. Click **Open**.



The Pre-Approval Report screen appears.

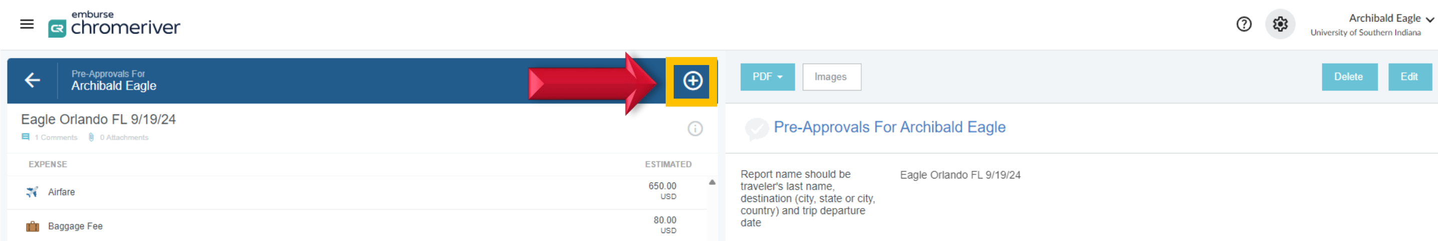
On the right-hand side, **Scroll Down** to review the **Comments** section for notes on why the Pre-Approval was returned. These notes will guide you on what needs to be revised before resubmitting the Pre-Approval.

- This could include but is not limited to, Adding a Pre-Approval Type, Deleting or Editing a Pre-Approval Type, Deleting/Adding Fund Orgs, Adding Comments, and/or Adding Attachments.



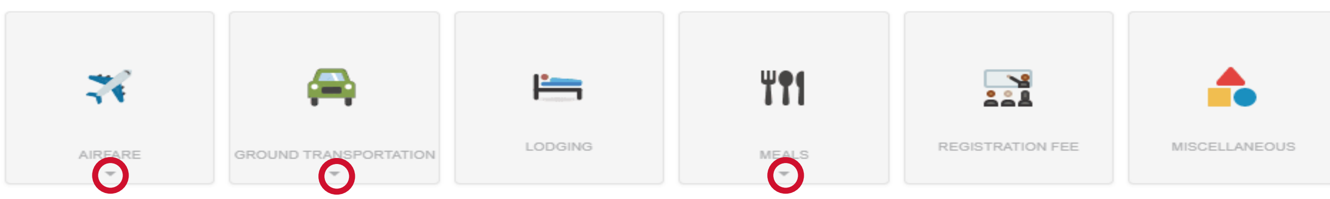
Add a Pre-Approval Type

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).



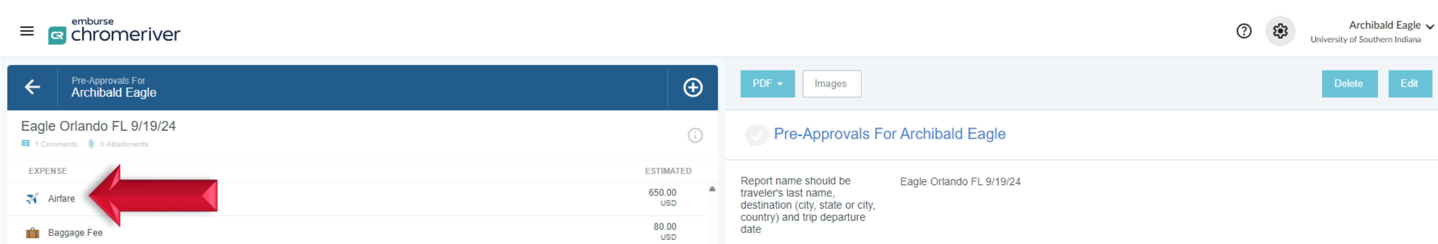
There are six Pre-Approval types. To add a Pre-Approval type, click a tile and enter the required information.

- Tiles with a gray triangle (circled in red) indicate additional options within those tiles. To see those selections, click the tile.



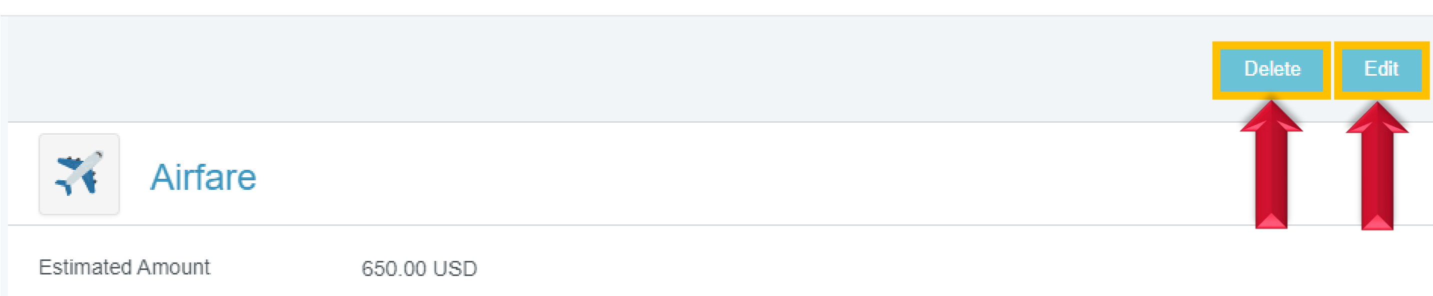
Delete or Edit a Pre-Approval Type

Click the Pre-Approval type from the left-hand side.



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

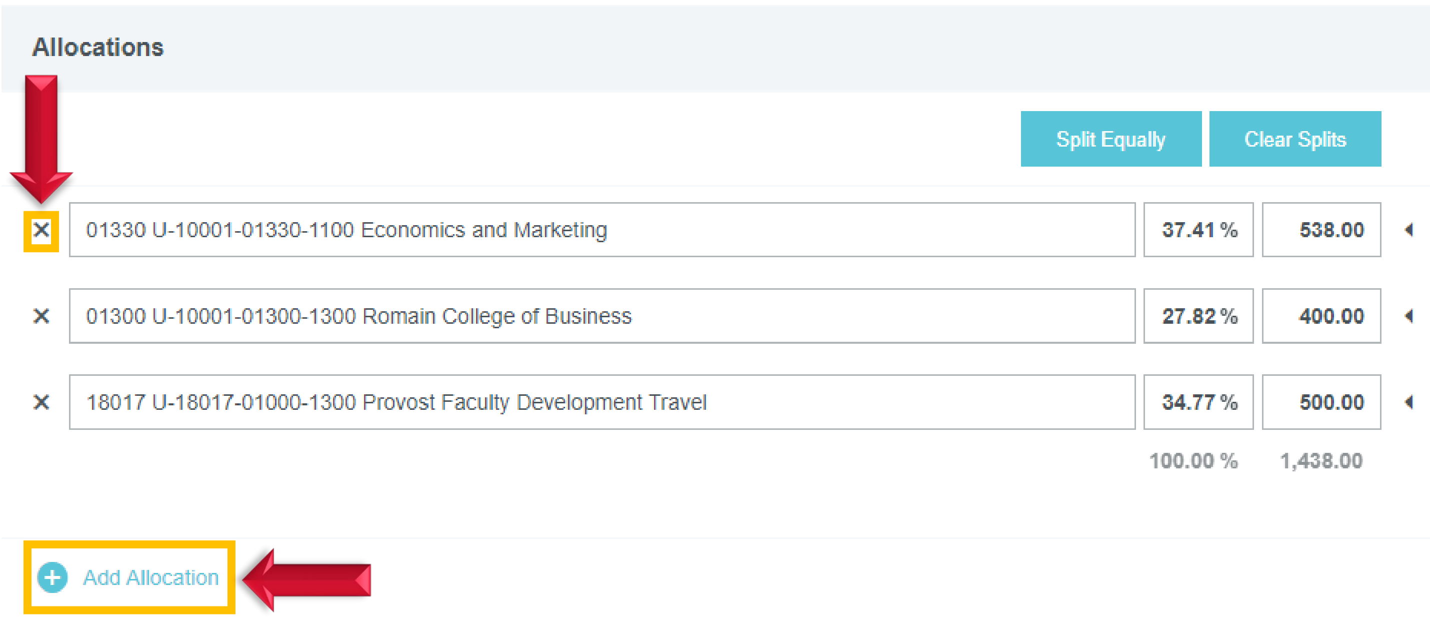
- View the guide *Deleting a Pre-Approval* to delete a whole Pre-Approval.



Delete/Add Fund Org

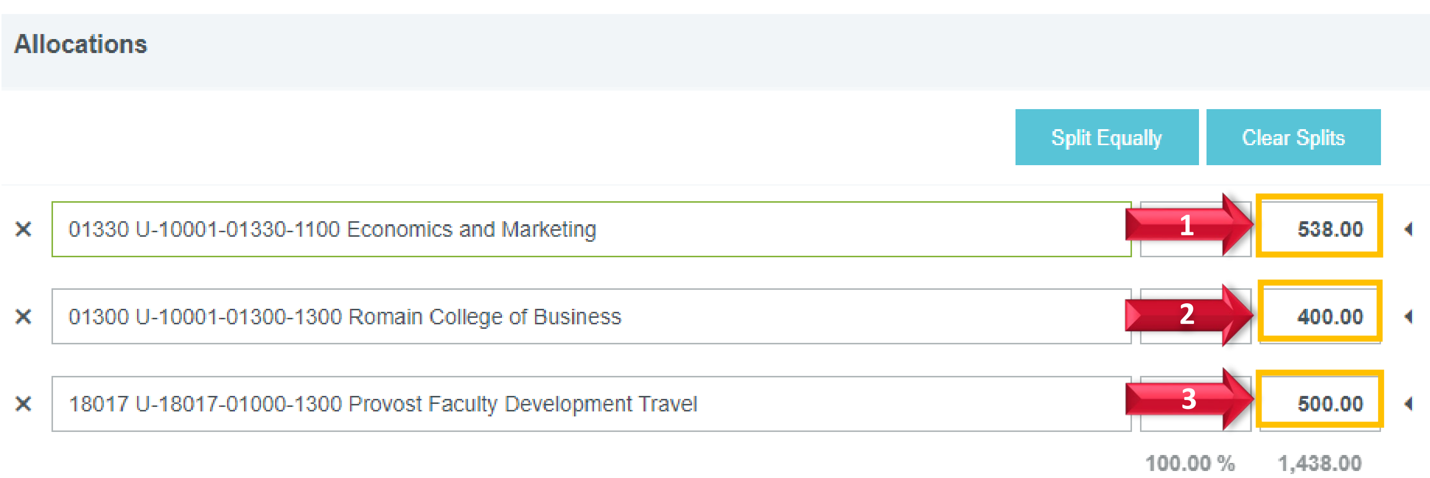
To delete or add a Fund Org, click the **Edit** button in the upper right-hand corner of the Pre-Approval Report. Then, **scroll down** to the **Allocations** section.

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

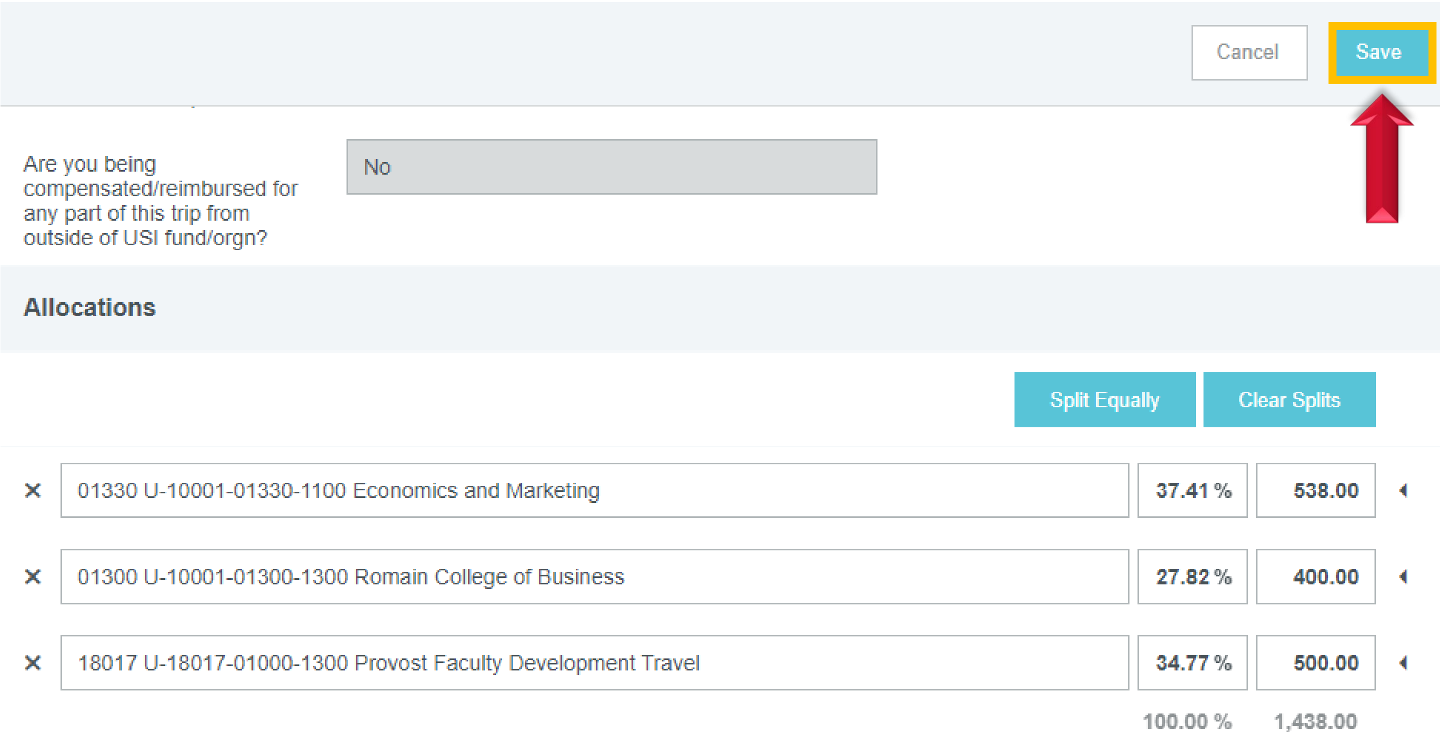


Continue to delete or add Fund Org as needed. Then, review the dollar amounts listed for each Org to ensure they are correct. If needed, then adjust the dollar amounts (last column) from the first listed Org to the last (top-down).

- Example: If you receive $400 from Dept (1), $600 from College (2), and $500 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 the necessary edits have been made, click **Save**.



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.

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 is in view.

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

Attachments

Use this area to upload:

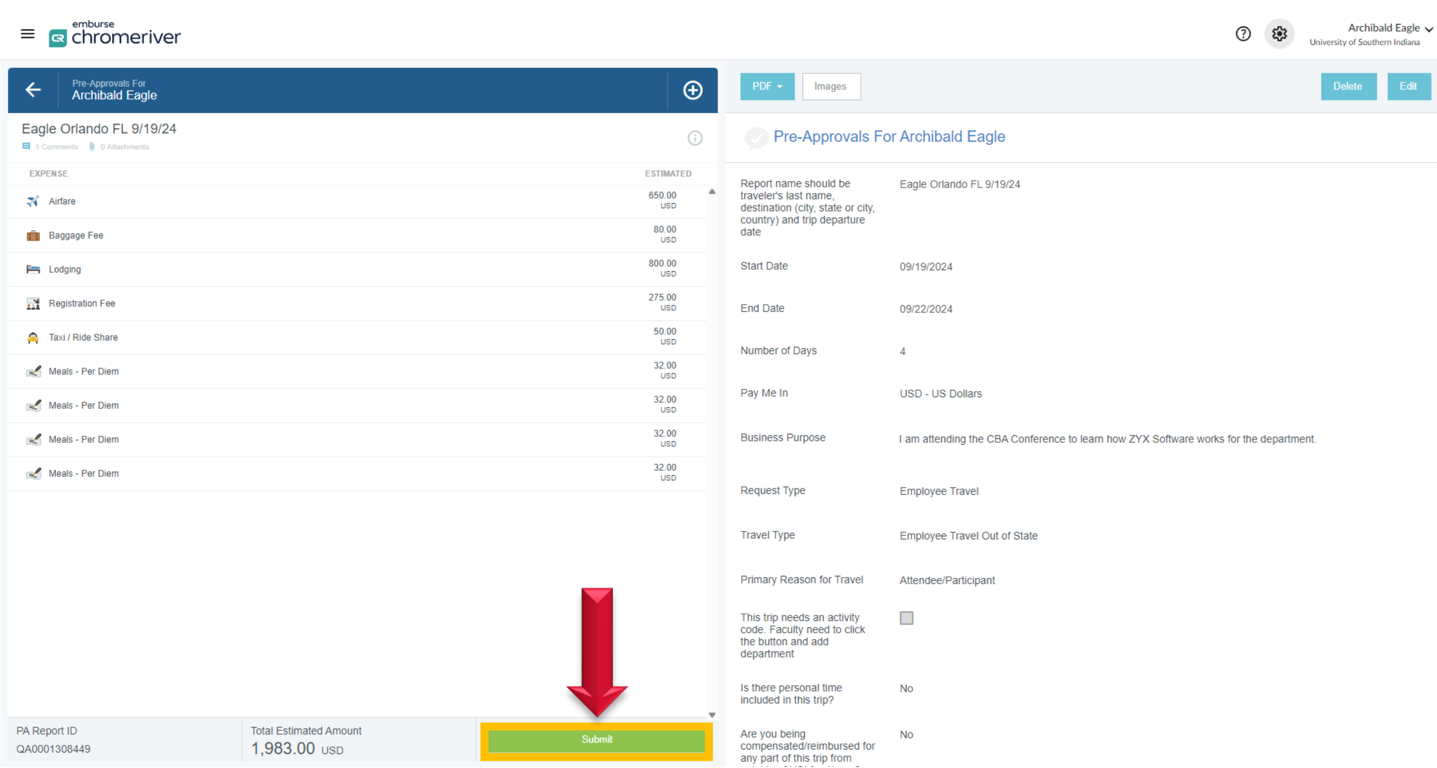
- Conference schedule, research trip itinerary, recruitment travel agenda, letter of invitation, etc.
- Documents for internal communication, such as class coverage schedule.

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.

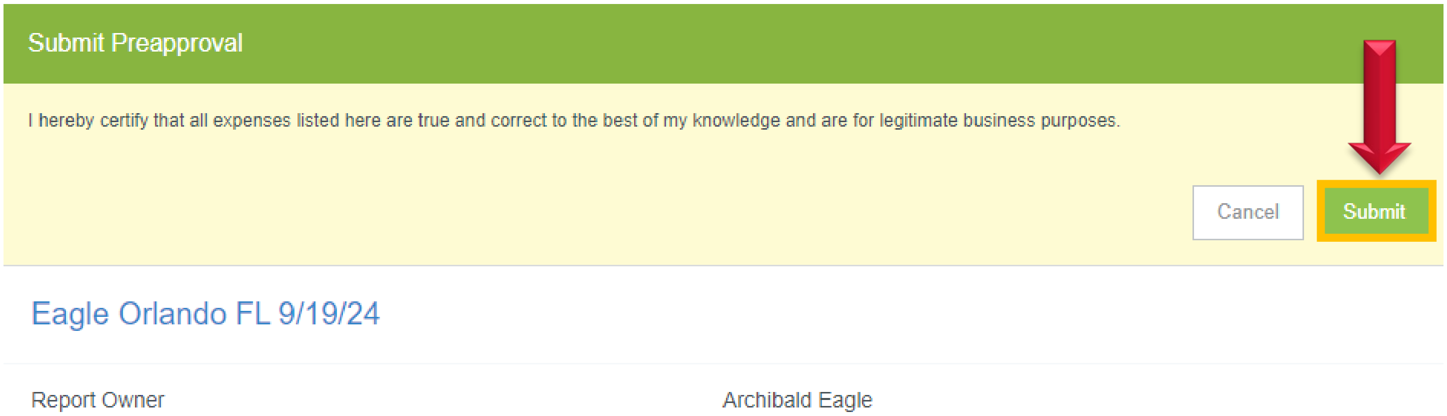
Step 3: Resubmit the Pre-Approval

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**.



If the report was resubmitted 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.