Scenario:

Travel Dates:	10/1/2019-10/4/2019
Conference:	Chrome River Users Group (CRUG)
Location:	Salida, California

Step	What to Do	Notes
1.	Log into Chrome River	C
	Information provided in classroom	
		Login
		User ID Forgot?
		Password Forgot?
		Company ID Forgot?
		Login
		Remember me
		Remember me
2.	Click the + New icon and select New Pre-Approval	+ New
	Report	C New Expense Report
		New Pre-Approval Report
		New Invoice
3.	The Pre-Approval Header page will be displayed	Cancel Save
	on the right side of the screen.	Pre-Approvals For Wu Shock
		Report Name
		Departure Date 07/04/2019
		Ratur Data 07/04/249
4.	Enter the Report Name:	Report Name
		Naming convention for the Report Name field is:
		Meeting/Conference Name or Destination
		and Dates of Travel
		Example: CRUG Conference, 10/01/2019-10/04/2019
5.	Select the Departure Date:	Departure Date
5.	 Click on the calendar icon 	 October 2019 ▶
	Arrow to the proper month	Su Mo Tu We Th Fr Sa
	Click on the proper date	29 30 1 2 3 4 5
		6 7 8 9 10 11 12
		13 14 15 16 17 18 19 20 21 22 23 24 25 26
		27 28 29 30 31 1 2

Step	What to Do	Notes
6.	 Select the Return Date: Click on the calendar icon Arrow to the proper month Click on the proper date 	Return Date Su Mo Tu VE Th Fr Sa Su Mo Tu WE Th Fr Sa 29 30 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1 2
7.	 Enter the Business Purpose: Attending the Chrome River Users Group (CRUG) Conference to obtain knowledge re: higher ed practices and network with professionals from peer institutions. 	Business Purpose The business purpose should explain: > what purpose the expenditure served, > why the expense was necessary, > how it furthered the University's goals
8.	Select the appropriate Traveler Type: ➤ Employee	Traveler Type Select Select Employee Student Candidate
9.	 Enter the Destination of the travel event: Begin typing the destination city in the field The system will begin to display values 	Destination - Select
	 matching the information entered Select the appropriate value For this example select: United States / California / Salida 	United States / Colorado / Salida United States / California / Salida
10.	Select the Travel Type: ➤ Out of State	Travel Type Select Select In State Out of State International
11.	 Select the appropriate answer to the "Are you a faculty member traveling with students" question: Either value is appropriate for this testing scenario 	Are you a faculty member traveling with students?

Step	What to Do	Notes
12.	 Select the appropriate answer to the "Are you attending a Conference" question: ➢ Select Yes 	Are you attending a Conference? Select No Yes
	Notice the Blue highlighted message that appears below the question	Are you attending a Conference? Remember to attach a copy of the Agenda/Schedule at a glance when submitting the Expense Report.
13.	 Will there be personal time during this trip? If your travel event includes both personal and business travel select the check box next to the "Will there be personal time during this trip" question. 	Will there be personal time during this trip?
	For this scenario, leave the checkbox unchecked	
14.	 Begin typing in the Search for Funding box to locate and select the appropriate funding for the Pre-Approval Report. As you begin typing, the system will display results that contain the value entered. Enter your Fund, Org or Department Name and click on the appropriate value from the displayed results 	Please type the funding you would like to search for in the box below. As you type, a drop down list of matching items will be displayed for selection. Funding Financial • A2000-101510-01620 A2000: GU General Fees Fund 101510: Financial Operations • D10252:101510-01620 D10252: RU Controller's Office 101510: Financial Operations • D10252:101510-01620 D11222: RU Fin Operations 101510: Financial Operations
15.	Once the funding value has been selected, the value "0000-Pre-Approval" will display below the funding line.	Funding D10252-101510-01620 D10252: RU Controller's Office 101510: Financial Operations 0000-Pre-Approval
16.	Click Save in the upper right hand corner of the form.	Cancel Save Pre-Approvals For Wu Shock Report Name CRUG Conference 10/01/2019-10/4/2019

Step	What to Do	Notes
17.	The Add Pre-Approval Types screen will appear on the right side of the screen.	Add Pre-Approval Types
		AR TRAVEL TRANSPORTION HOTEL MEALS
		CONFERENCE RESISTANCE RESISTANCE TRAINING
18.	Select Air Travel, and select Airfare from the options that display.	AR TRAVE AR TRA
19.	The Airfare expense form will display	Airfare Estimated Amount 0.00 🗐 USD Description Optional
20.	Estimated Amount: Enter 425.00	Estimated Amount 425.00
21.	 Description (optional): The Description will be used to give more explanation of the expense Enter Airfare from Wichita to California 	Description Airfare from Wichita to California
22.	 To Be Paid By: ➢ Click the drop down arrow and select the appropriate value, options include ○ Accounts Payable Invoice ○ Foundation Funds ○ No Cost to WSU ○ Personal Funds ○ Procurement Card 	To Be Paid By Select Select Accounts Payable Invoice Foundation Funds No Cost to WSU Personal Funds Procurement Card

Step	What to Do	Notes
23.	Click Save in the upper right hand corner.	Cancel Save
		Estimated Amount 425.00 USD
		Coptonal
24.	The expense will be added to the report and displayed in the expense list on the left side of the screen.	← Pre-Approvals For Wu Shock ● CRUG Conference 10/01/2019-10/4/2019 () □ 0 Comments 0 Attachments EXPENSE ESTIMATED ☆ Airfare 425.00 USD
25.	Select the Conference Registration / Training expense tile located on the right side of the screen. **Note: If the expense tiles are not visible on the right side of the screen, click the add expense icon to display. ← Pre-Accrevels For Wu Shock	Add Pre-Approval Types
26.	The Conference Registration / Training form will display.	Conference Registration / Training Estimated Amount 0.00 Im USD Description Optional
27.	Estimated Amount: Fnter 275.00	Estimated Amount 275.00 🖬 USD
28.	 Description (optional): The Description will be used to give more explanation of the expense Enter Registration for the Chrome River Users Group (CRUG) Conference 	Description Optional Conference

Step	What to Do		Notes
29.	To Be Paid By:	To Be Paid By	Procurement Card -
	Click the drop down arrow and select the	io bortaid by	ribularian cara -
	appropriate value, options include Accounts Payable Invoice 		
	 Accounts Payable Invoice Foundation Funds 		
	 No Cost to WSU 		
	 Personal Funds 		
	 Procurement Card 		
30.	Click Save in the upper right hand corner.		Cancel Save
		Conference R	Registration / Training
		Estimated Amount	275.00 🖬 USD
			gistration for the Chrome River Users Group (CRUG) nference .:!
		To Be Paid By Pro	ocurement Card 👻
31.	The expense will be added to the report and	Pre-Approvals For Wu Shock	\oplus
	displayed in the expense list on the left side of the	Wu Shock	
	screen	CRUG Conference 10/01/2	2019-10/4/2019
		EXPENSE	ESTIMATED
		🛪 Airfare	425.00 USD
		Conference Registration / Trai	ining 275.00 USD
32.	Review the information presented on the left side	+ Pre-Approvals For Wu Shock	\odot
	of the screen Ensure all expense types have been added	CRUG Conference 10/01/20	019-10/4/2019 🔅
	to the report Take note of the PA Report ID (if needed)	EXPENSE	ESTIMATED
	 Verify the total estimated amount is 	🛪 Airfare	425.00 AUSO
	correct	Conference Registration / Train	ning 275.00 USD
	When finished, click the submit button		al Estimated Amount 00.00 USD
33.	The Submit Preapproval screen will display on the	Submit Preapproval	
	right side of the screen.		
	Review the report summary information	are for legitimate business purposes.	d here are true and correct to the best of my knowledge and
	Read the certification statement Click Submit to submit the report		Cancel Submit
	Click Submit to submit the report		
		CRUG Conference 10/01	1/2019-10/4/2019
		Report Owner	Wu Shock
		Created By	Wu Shock
		Create Date	07/04/2019

Step	What to Do	Notes	
34.	The confirmation message will display.	Report submitted X	
35.	Click the "ChromeRiver" icon to return to the home page.	CHROMERIVER	
36.	To view the submitted report, click on the number listed in the "Submitted Last 90 days" section of the Pre-Approval	Approvals Needed 4 Expense Reports 2 Pre-Approvals	
		EXPENSES 20 3 40 Draft Returned Submitted Last 90 Days	
		PRE-APPROVAL 7 1 28 Submitted Last 90 days	
37.	Locate the report in the Submitted Pre- Approvals list. ➤ Note: The report status is displayed below the amount field. ➤ Statuses include:	Submitted Pre-Approvals = CRUG Conference 10/01/2019-10/4/2019 07/04/2019 700.00 010000339449 USD PENDING	
38.	Click to display the report on the right.	Submitted Pre-Approvals Com POF- Tracking CRUG Conference 13/01/2019-16/4/2019 07/04/2019 700.00 (PV/SP) CRUG Conference 10/01/2019-10/4/2019	+Rocal
39.	 Four options will be displayed along the top of the report: ▷ Open ▷ PDF ▷ Tracking ▷ Recall 	Open PDF + Tracking *Recall CRUG Conference 10/01/2019-10/4/2019 Report Owner Wu Shock Created By Wu Shock	
40.	Selecting Open will allow you to review the Pre-Approval report and individual expense lines in greater detail. Click the arrow pointing left to get back to the options screen.	CRUG Conference 10/01/2019-10/4/2019 O Comments O Attachments EXPENSE ESTIMATED 425.00	
	Repeat steps 35-38 to return to the options screen	Airfare 425.00 USD Image: Conference Registration / Training 275.00 USD	

Step	What to Do	Notes
41.	 Selecting PDF will display two options to select from: Full Report will create a PDF of the full report minus any attachments Full Report with Receipts will create a PDF of the full report and all attachments **Close the new window that opened with the PDF Report and you are now back at the options screen** 	PDF → Full Report Full Report with Receipts
42.	Selecting the Tracking button will display where the report is in the approval process.	Status Pending Approval Estimated Amount 700.00 USD
	Click the "X" in the upper right hand corner, and repeat steps 35-38 to return to the options screen**	Routing Steps Image: Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2"C
43.	 Selecting the Recall button will remove the report from workflow and return it to the expense owners draft Pre-approval section. > Pre-Approvals can only be recalled prior to obtaining final approval > Once in draft status, the expense owner or delegate can make any need adjustments to the Pre-Approval Report > Submitting the Pre-Approval will restart the workflow approval process 	Recall This Report? × This report will be moved to the draft list. No Yes

Step	What to Do	Notes	
44.	Log out by clicking the user icon in the upper right hand corner of the screen and selecting Logout	+ New L Wu Shock Last login: 07/04/2019 at 11:15 AM	
		Select Another User	
		Print New Invoice Cover	
		Settings	
		C System Administration	
		(?) Help	
		Logout	
45	Consolate		
45.	Complete		