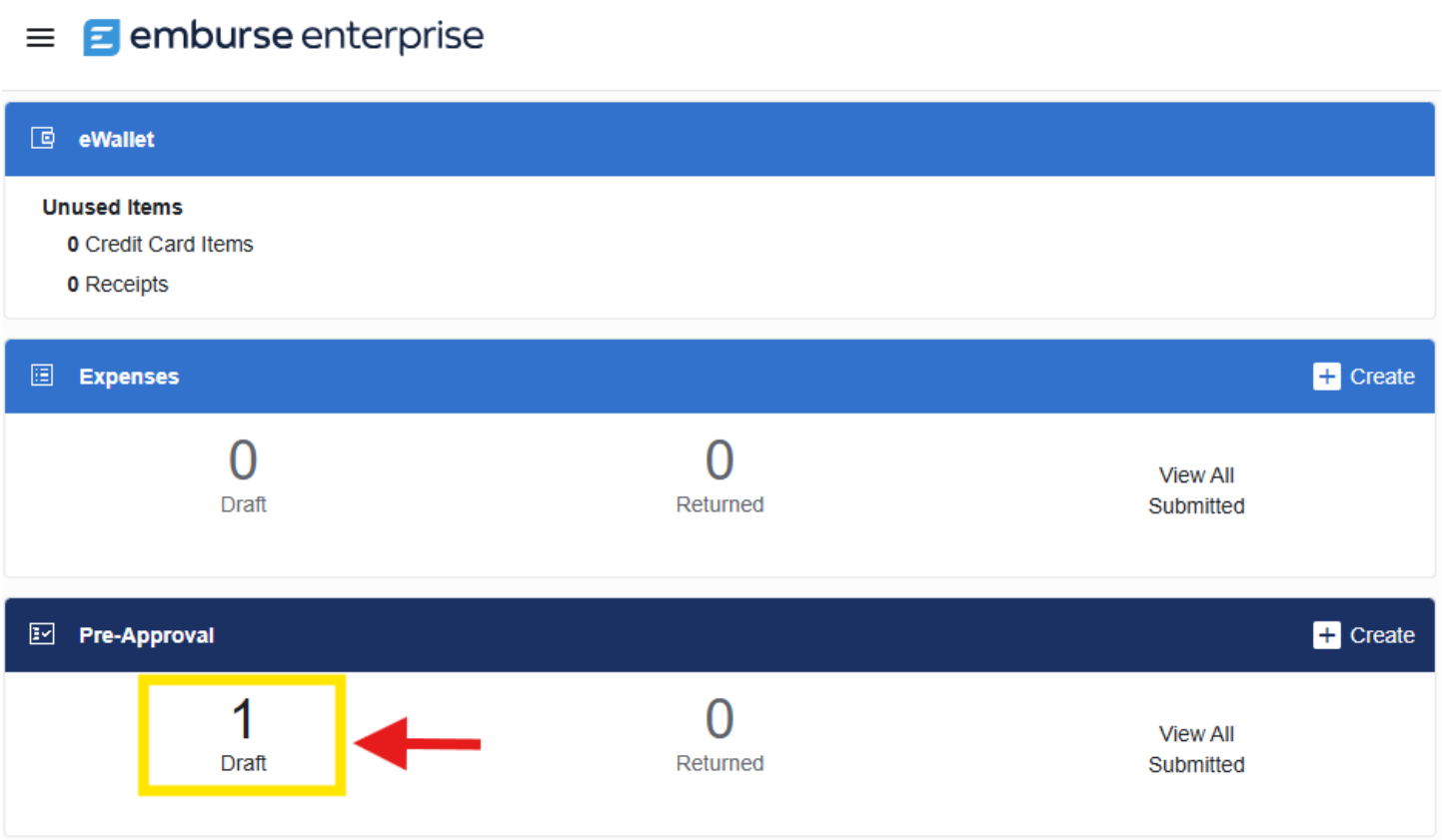
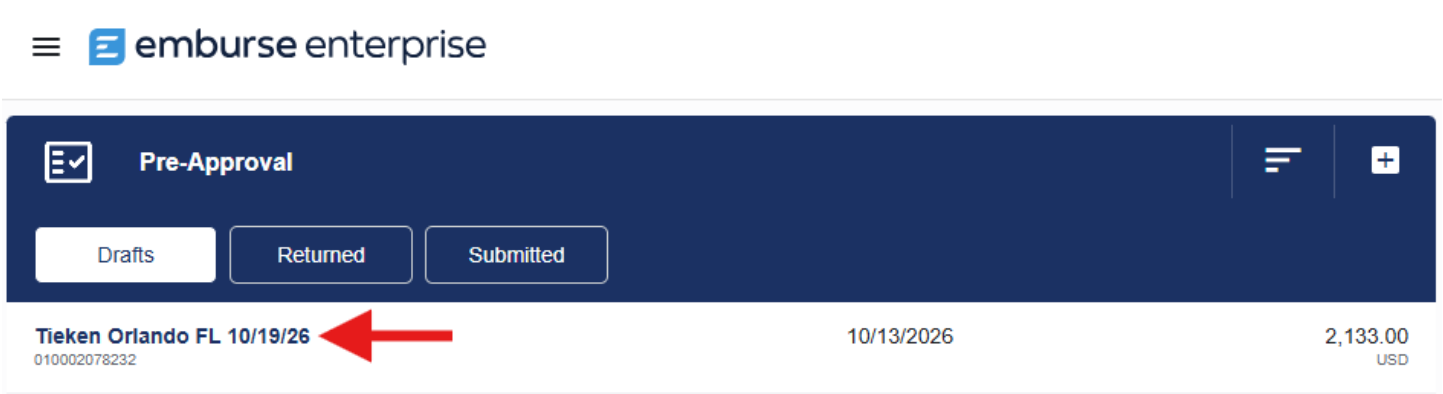
Emburse User Guide:
Edit a Pre-Approval

Step 1: Select the Pre-Approval

In the Pre-Approval ribbon, click **Draft** or **Returned**, whichever folder the Pre-Approval is in.

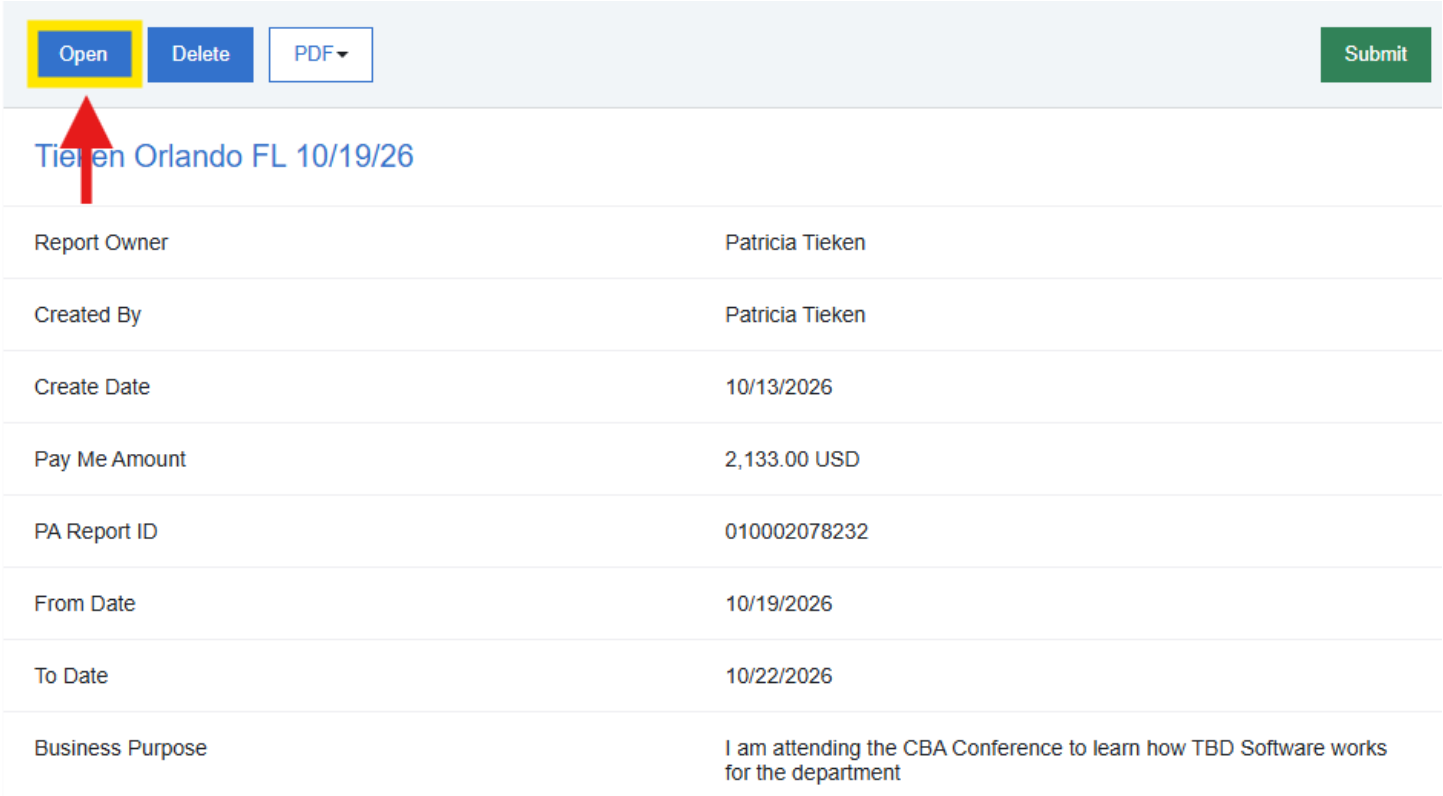


Select the Pre-Approval that needs editing.



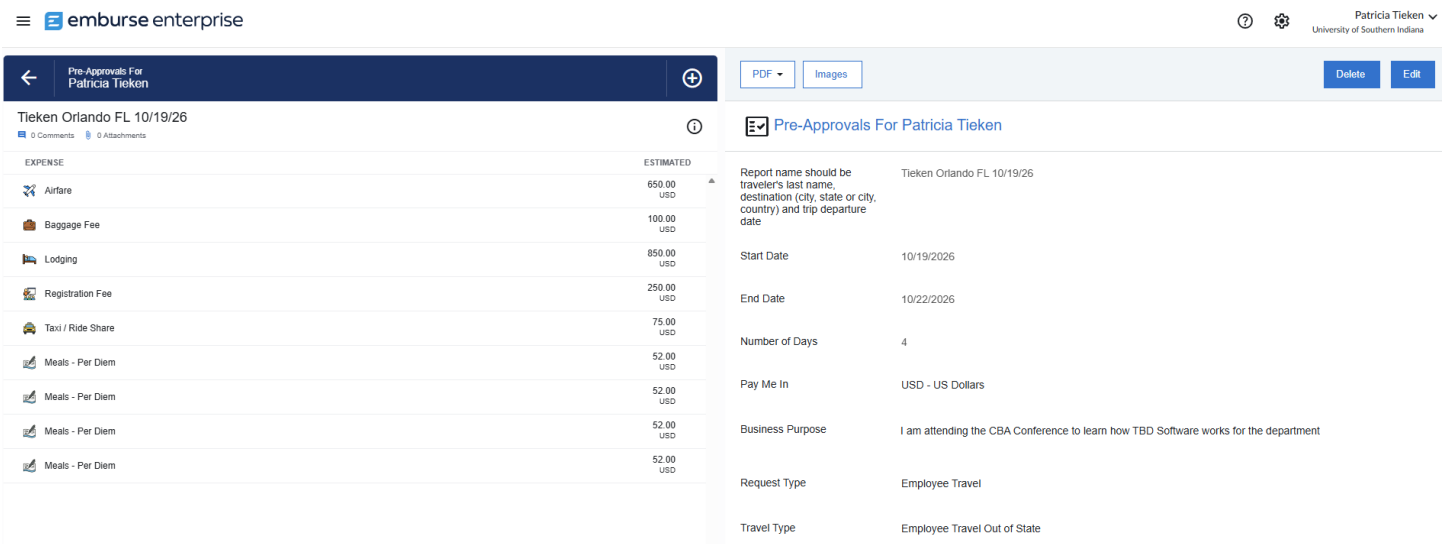
Step 2: Edit the Draft Pre-Approval (top)

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



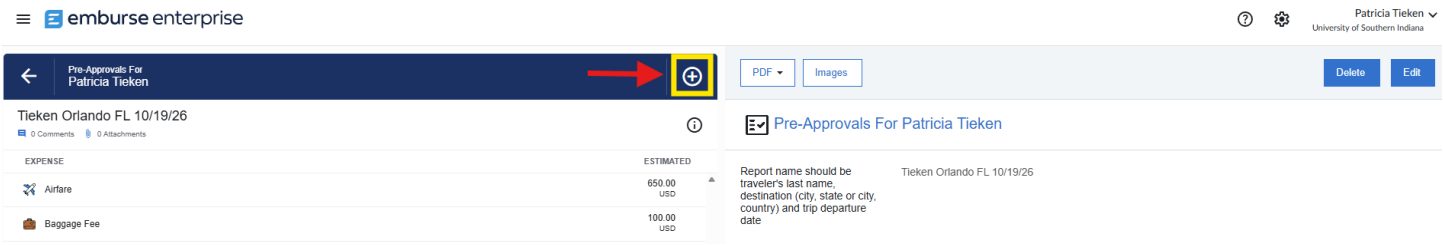
The Pre-Approval Report appears. You can Add a Pre-Approval Type, Delete or Edit a Pre-Approval Type, Delete/Add Fund Orgs, Add Comments, and/or Add Attachments.

- If the Pre-Approval was in the Returned folder, then view the Comments section to see why the Pre-Approval was returned and address it.



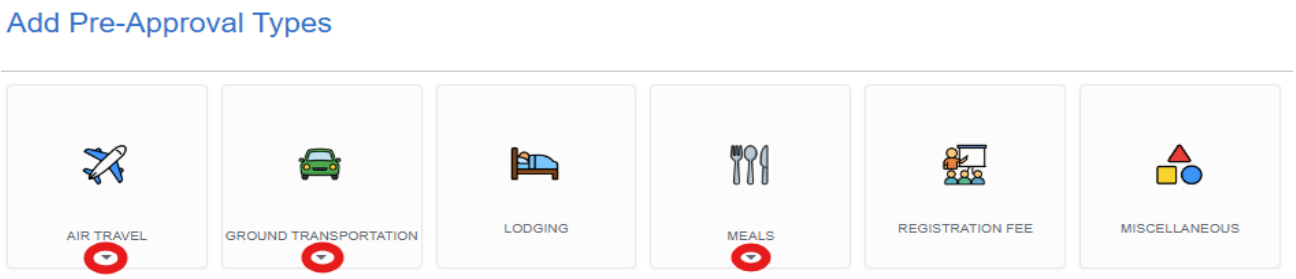
Add a Pre-Approval Type (top)

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).



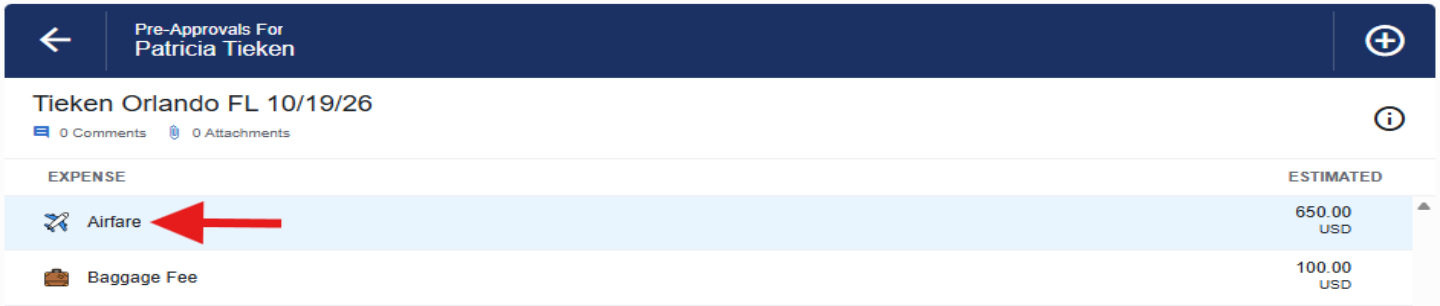
You can choose from six PA Types, referred to as expense tiles. To add a tile, select the appropriate expense tile and enter the required information. Expense tiles marked with a gray triangle (circled in red) contain additional sub-tile options. Select the expense tile to view the available sub-tiles.

- Note: Do not use the Miscellaneous tile. If an appropriate expense tile is not available, then contact Travel for assistance.



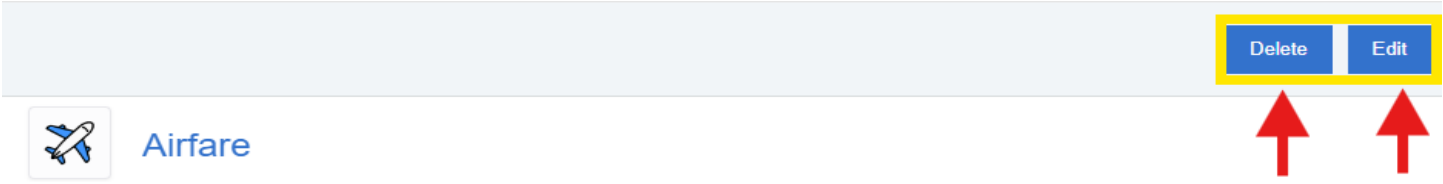
Delete or Edit a Tile

Click the **Tile** from the left-hand side that needs to be deleted or edited.



Delete removes the tile, and **Edit** lets you make changes.

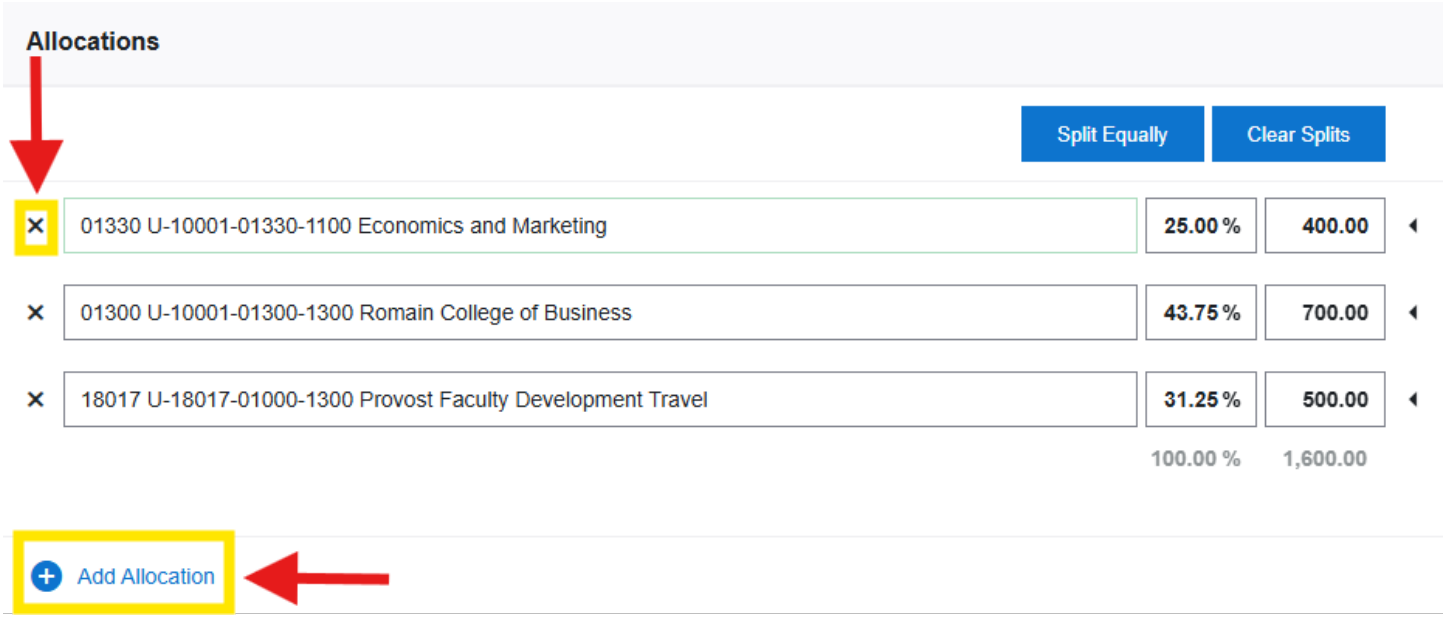
- View the guide *Delete a Pre-Approval* if a whole Pre-Approval needs to be deleted.



Delete/Add Fund Orgs (top)

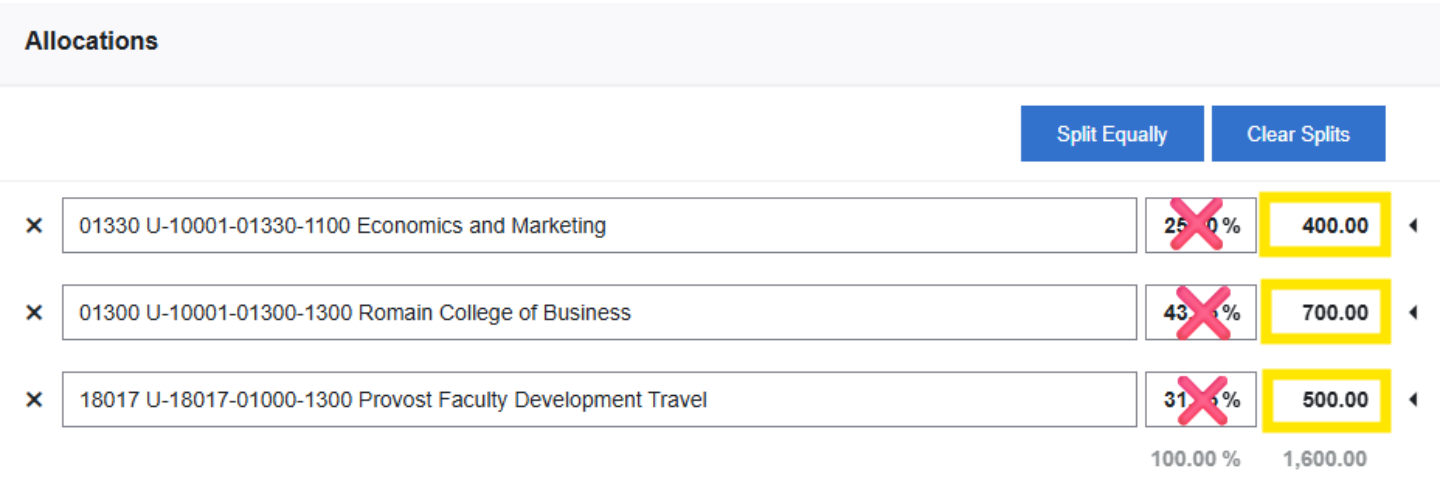
To delete or add a Fund Org, click the **Edit** button in the upper right-hand corner of the Pre-Approval Report. Then, **scroll down** to the **Allocations** section.

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

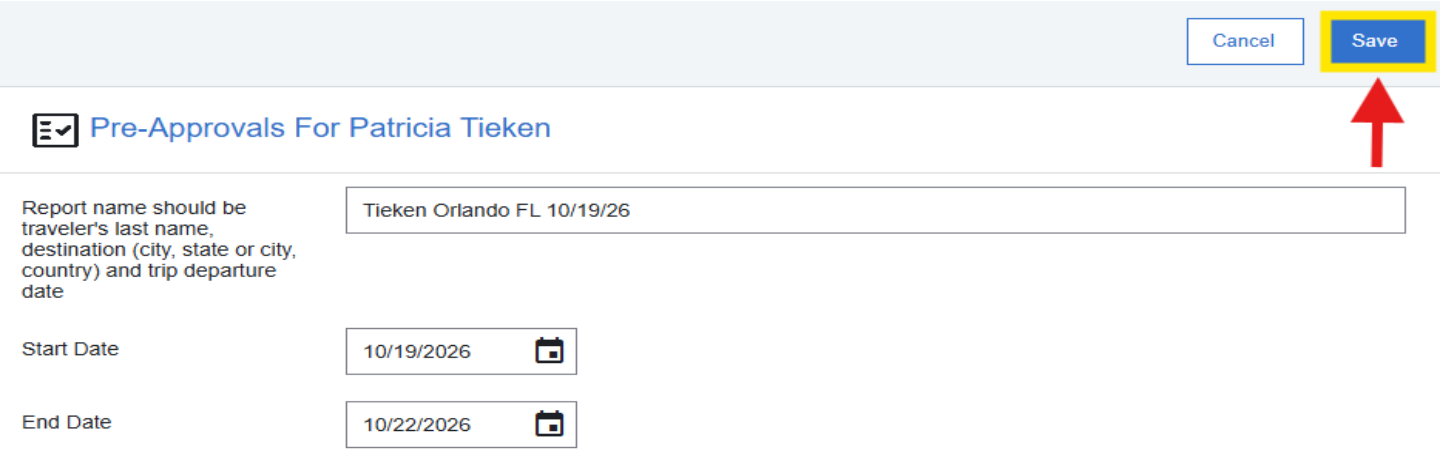


Continue to add Fund Orgs as needed. Then adjust, from the first listed Fund Org to the last (top-down), the amounts being funded by each Fund Orgs.

- Example: If receiving $400 from Dept (1), $700 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**.



Add Comments (top)

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 a 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:

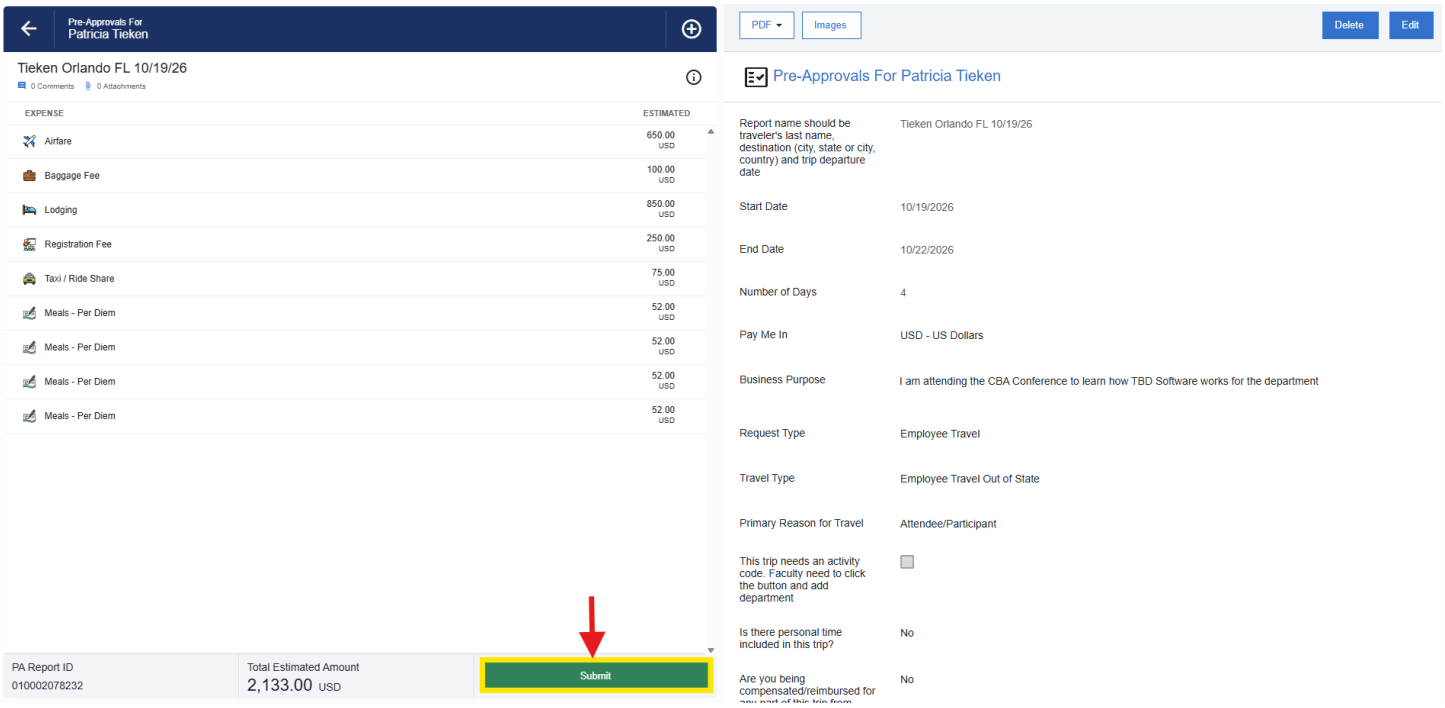
- Conference schedule, research trip itinerary, recruitment travel agenda, letter of invitation, etc.
- Documents for internal communication, such as class coverage schedule.

Note:

- Chrome River can only attach documents in the following formats: PDF, PNG, and JPEG.
- Documents can be dragged to the selected 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 trash can in the upper left-hand corner to delete.

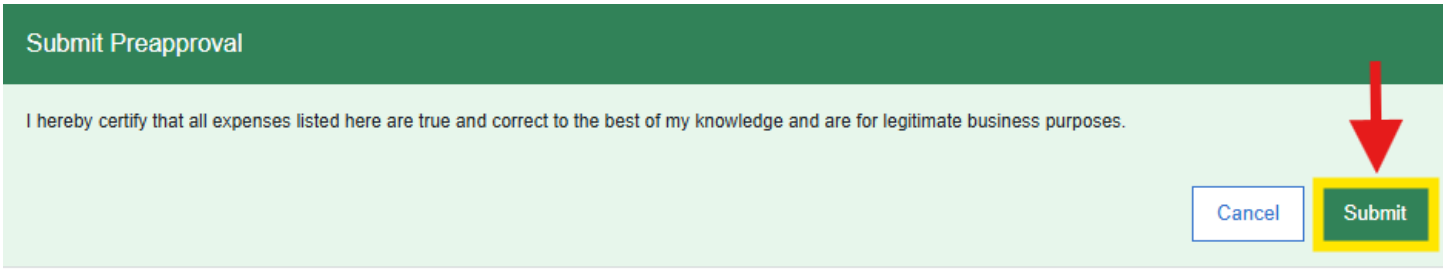
Step 3: Submit the Pre-Approval (top)

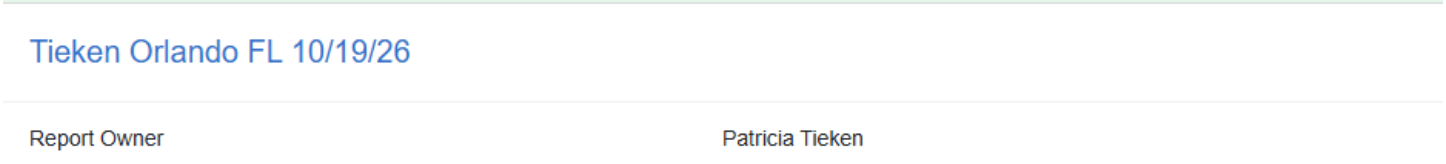
Click **Submit**.



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 submitted successfully, then the message below will briefly appear at the top of the screen.

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

