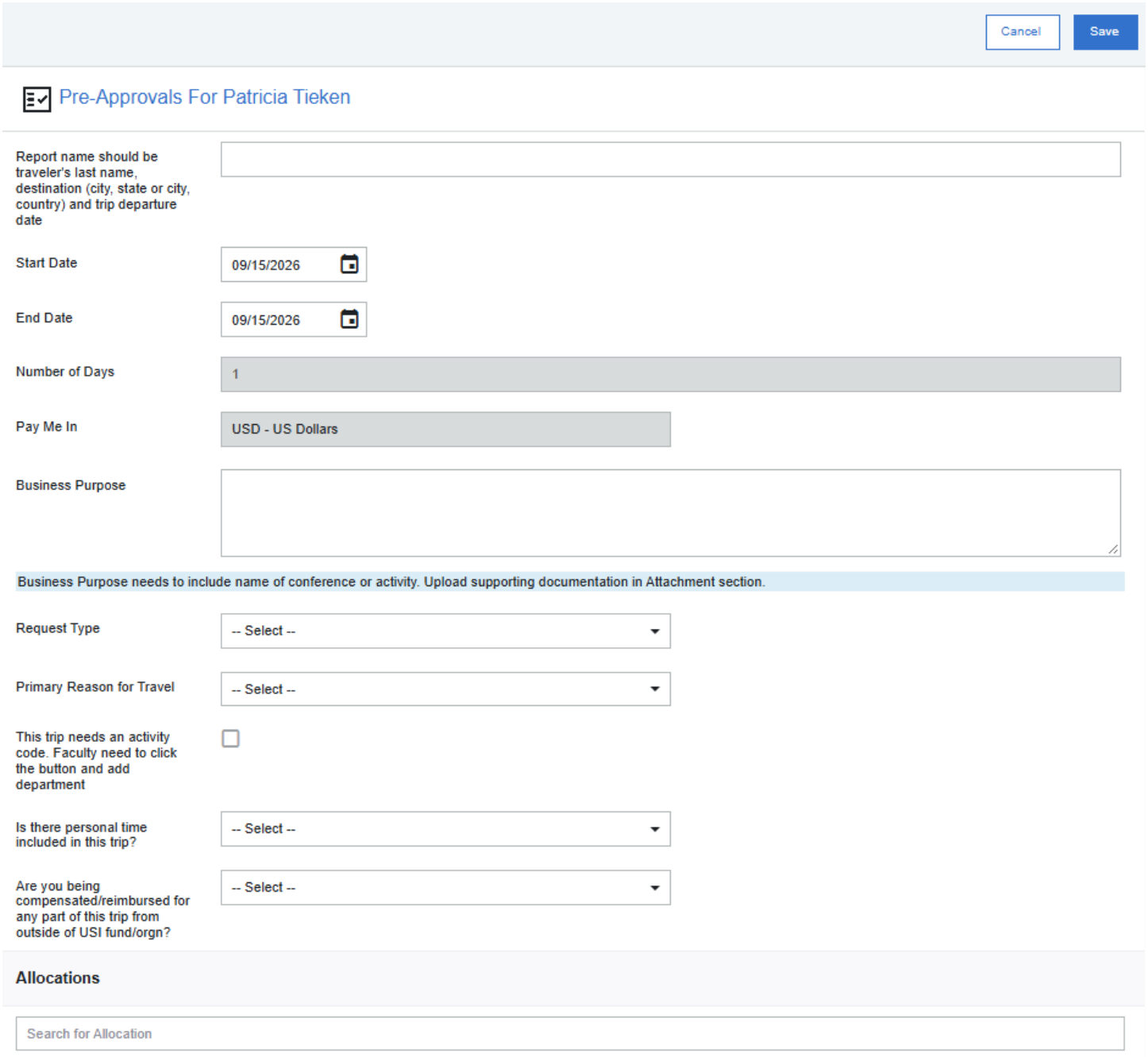
Emburse User Guide:
Create and Submit a Pre-Approval

Step 1: Complete the Pre-Approval (PA) Header

Click **+Create** in the top right-hand corner of the PA ribbon.



Complete the PA Header.



Report Name
Enter your last name, destination (city and state or city and country), and trip departure date. No punctuation. Maximum of 45 characters allowed, including spaces.

- *Tip*: Use the two-letter state abbreviation and short date format.
    - Example: Smith Terre Haute IN 14Oct26
    - Example: Williams Paris France 11/3/26

Start Date and End Date
Dates range from when you leave campus/home to when you return to campus/home.

Business Purpose
Provide details that answer what and why the university is supporting travel:

- Example: Attending the CBA Conference to learn how TBD Software works for the department.

Request Type
Select the option that best fits your request type.

- Note: If students are involved with the trip, then select Student Travel

Travel Type
Select the option that best fits your travel type.

- Note: If students are involved with the trip, then select Student Domestic Travel

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 must check this box and select their department from the drop-down list. If your department is not listed, then choose the department where 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 in the text box labeled Outside Fund Details, you may either enter the source and amount of funding or the source and list the expenses being covered.
    - Example: ABC Organization is giving me $500 to cover travel expenses
    - Example: CBA Organization is paying for my airfare and hotel expenses

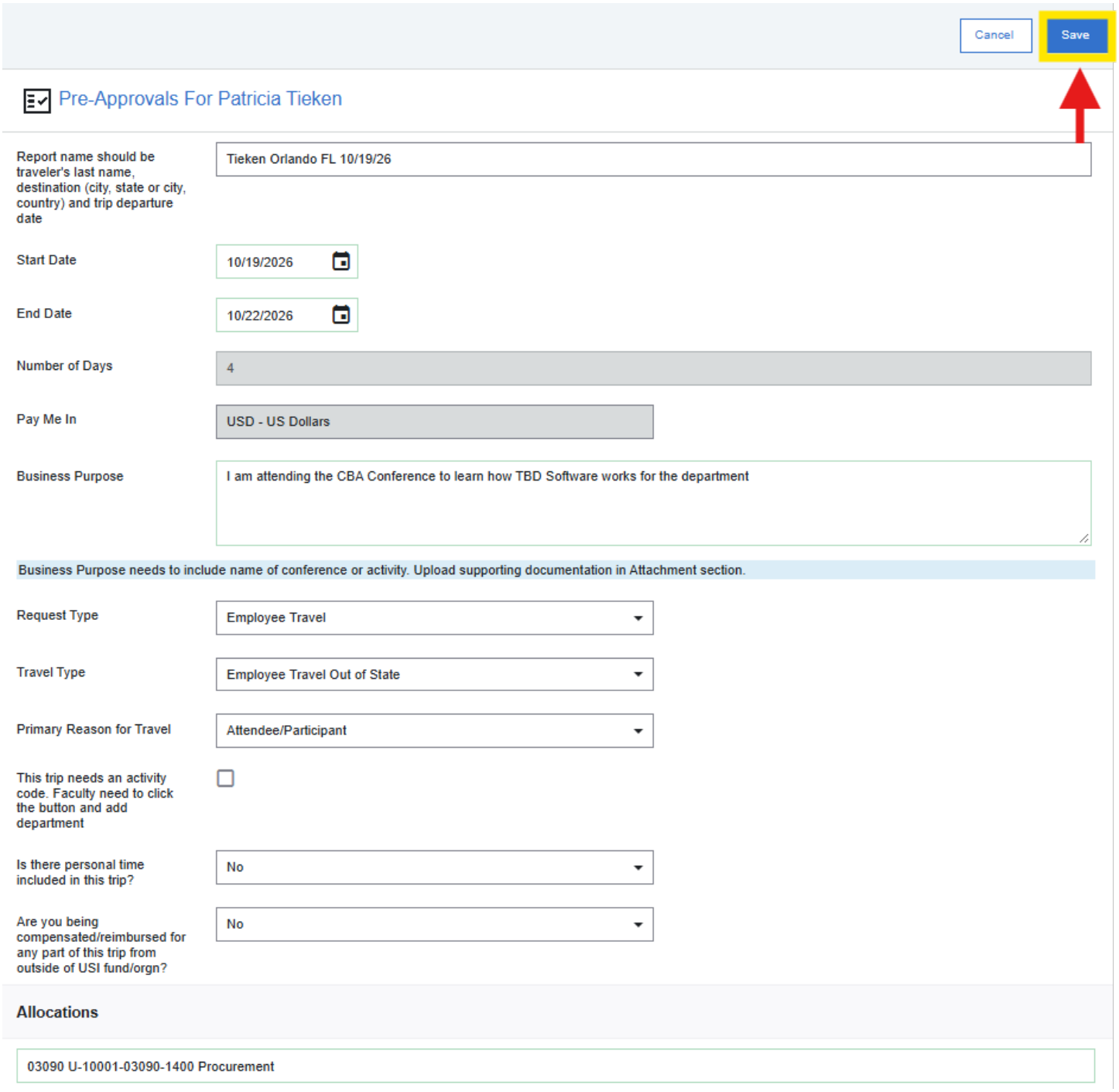
Allocations
Select the funding source for the trip.

- *Tip*: To narrow the search list of Fund Orgs, type the index code or the department name.
- *Tip*: If multiple Fund Orgs are required, then enter only one Fund Org at this stage. Additional Fund Orgs may be added in Step 4 of this guide.

Important: Review **ALL** the information on the PA Header:

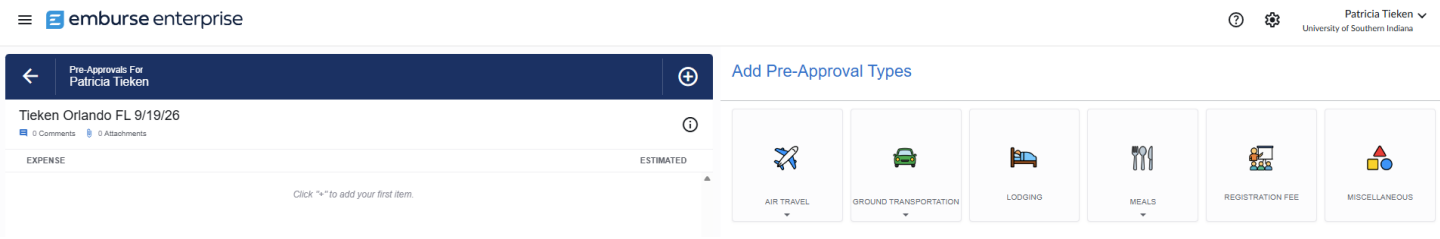
Although you can change most areas of the PA Header, you cannot change the Request or Travel Types after saving. If you saved an error in either the Request or Travel Types, create a new PA and delete the incorrect one.

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



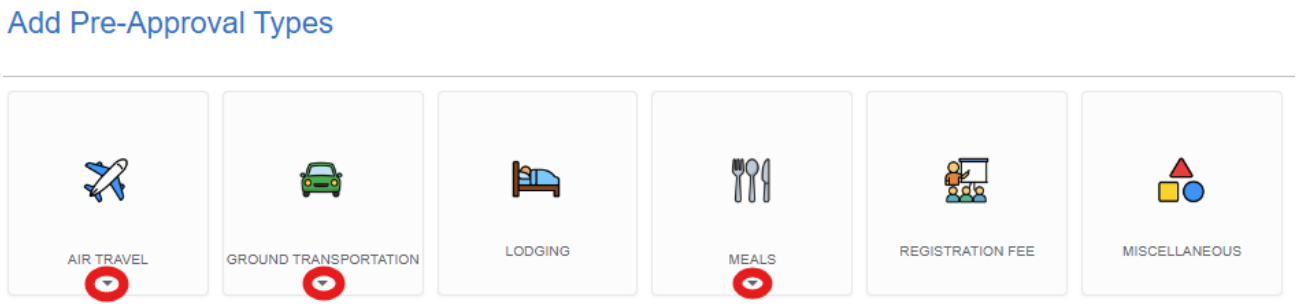
Step 2: Add Expense Estimates to the Pre-Approval (PA) (top)

Below is the screen that appears after you populate and save the PA Header. This is called the PA Report.



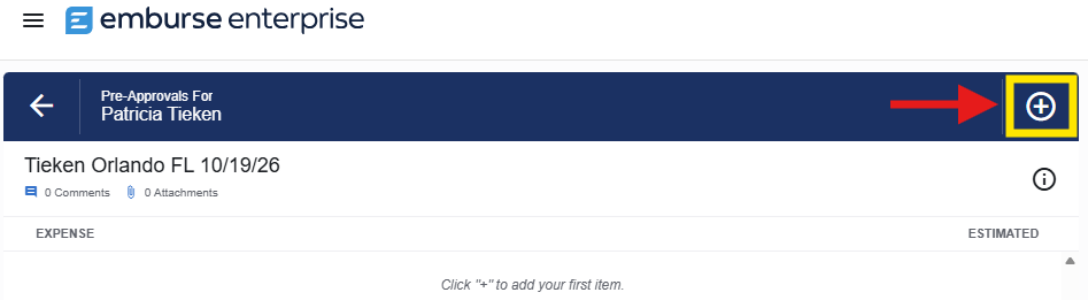
You can choose from six PA Types, referred to as expense tiles. To add a tile, select the appropriate expense tile and enter the required information. Expense tiles marked with a gray triangle (circled in red) contain additional sub-tile options. Select the expense tile to view the available sub-tiles.

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



- If funding support is less than the estimated cost of the trip, select only the expense tile(s) needed to equal the total approved funding amount.
    - Example: If total funding support is $1,200, enter expense tiles totaling $1,200 (e.g., $500 Airfare and $700 Lodging).
- *Tip*: If funding permits, then include a reasonable buffer in your trip estimates to account for potential price fluctuations. Airfare costs may change between the time a PA is submitted and when travel is booked.
- *Tip*: You may enter notes about the estimated total trip cost in the Comments section of the PA. While not required, this information helps approvers understand the total trip cost and any amount the traveler may be responsible for paying personally.
    - Example: Approved funding amount: $1,200; Estimated total trip cost: $1,750.

Tip: If the expense tile screen is not visible, then select the Plus button (the circle containing a plus sign) to display the available expense tiles.



Air Travel

- Airfare: Enter the estimated airfare amount. For the question, "Do you need USI to purchase your airfare?", select Yes if the airfare will be purchased using your USI TCard, or No if you will request reimbursement after the trip.
- Baggage Fee: The cost of one checked bag may be included for both the departure and return flights.

Meals: Sub-tiles

Important: Per Diem is not reimbursed for same-day travel (travel that does not include an overnight stay). Refer to the Travel Procurement Per Diem webpage for additional information.

- **Per Diem Wizard**: The primary method for calculating Per Diem for an individual traveler.
  - Refer to the guide: *Use the Per Diem Wizard*.
- **Meals – Business**: Primary method used to enter meal expenses for specific travel types such as Athletics teams and student group trips.
- **Meals—Per Diem:** Do not use. This sub-tile appears only to allow Emburse to calculate Per Diem correctly through the Per Diem Wizard.

Registration Fee

Membership fees may be included in the Registration Fee amount. Report membership fees separately when completing the Expense Report.

- *Tip*: This category may also be used for entry fees, park admissions, museum admissions, and similar registration-related expenses.

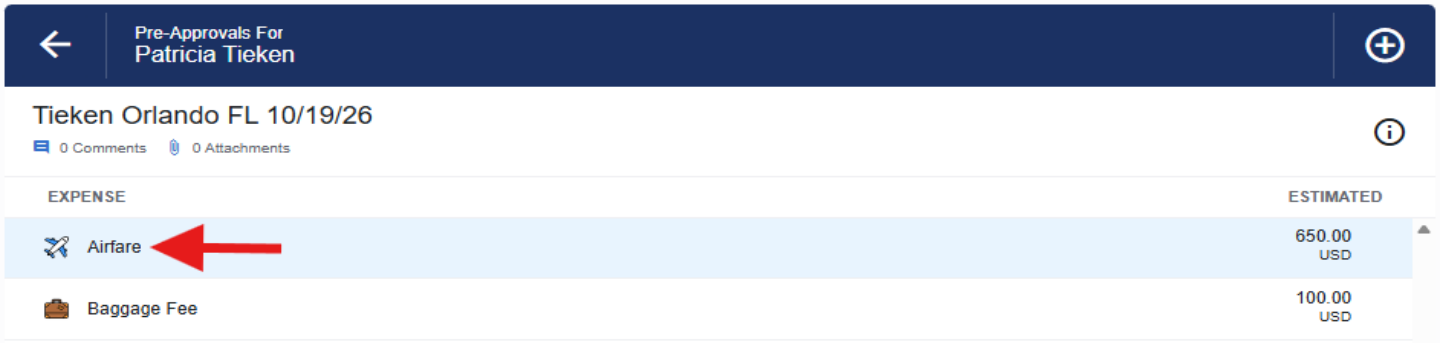
Miscellaneous

Use this tile only when no other expense tile appropriately applies.

- *Tip*: Email the USI Emburse Help Desk (chromeriver.helpdesk@usi.edu) if unsure.

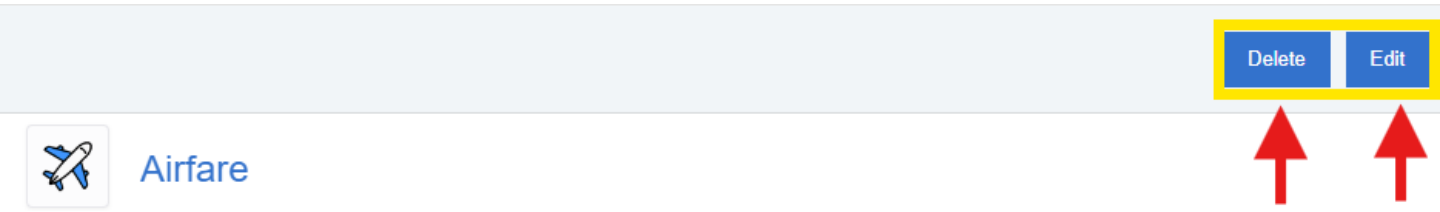
Delete or Edit a Tile

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



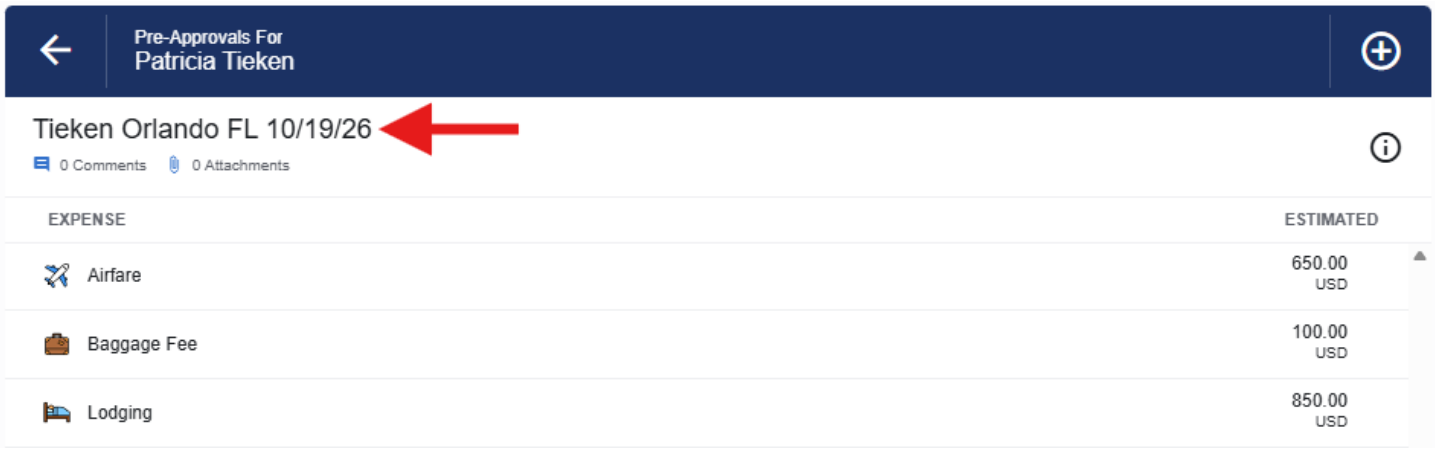
Delete removes the tile, and **Edit** lets you make changes.

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

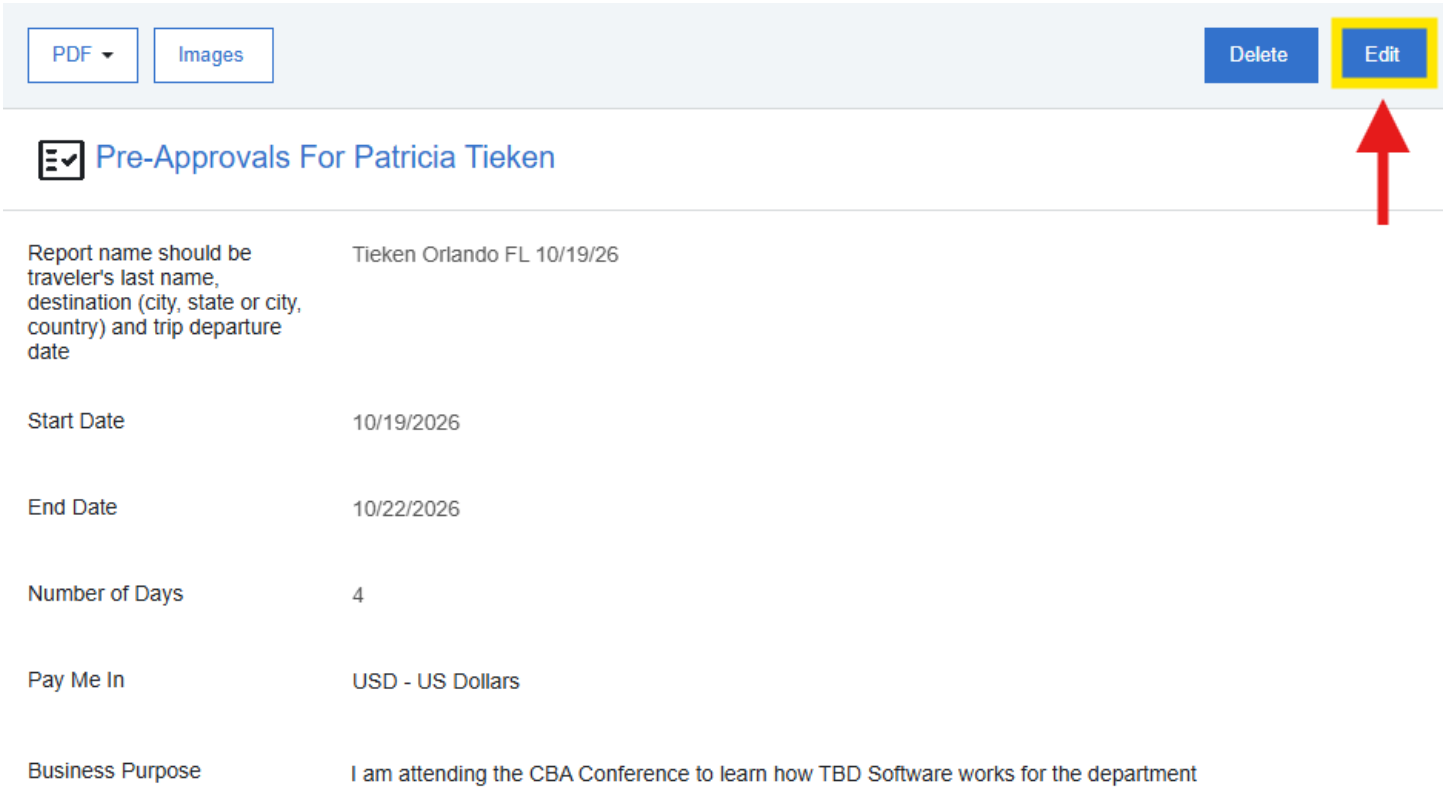


Step 3: Add Comments and Attachments (top)

Click the Report Description on the left-hand side to add Comments and Attachments.



Click **Edit**.



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

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

Important:

- Comments are visible to **ALL** who will review/approve the Pre-Approval Report and will appear on the approval email notifications. They are also permanent and once posted, they cannot be deleted.

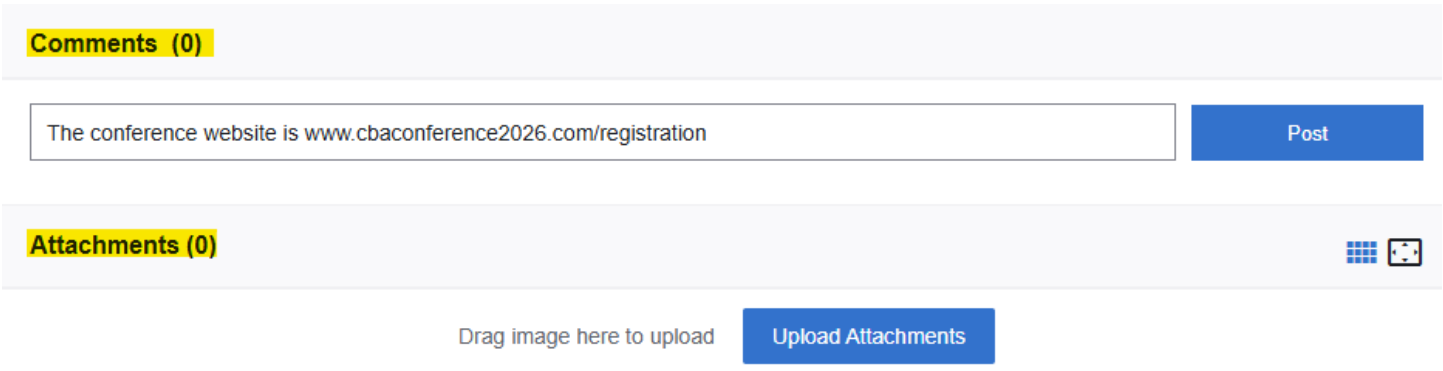
Attachments

Use this area to upload:

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

Note:

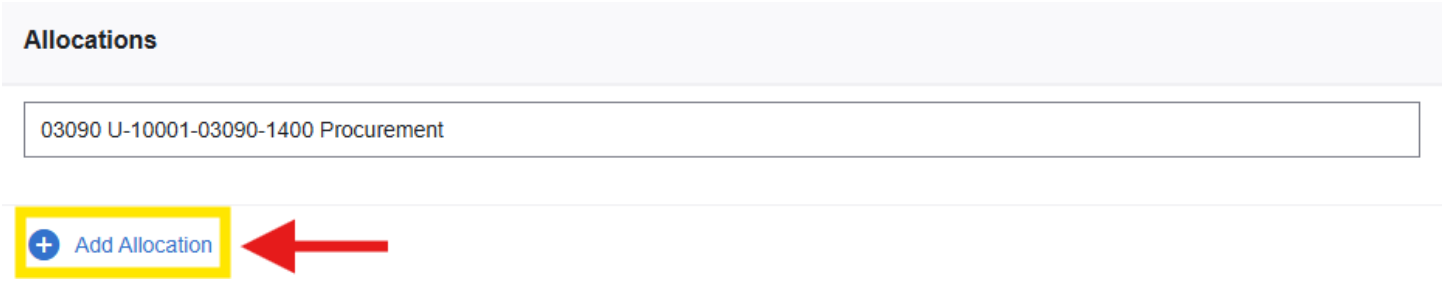
- Emburse can only attach documents in the following formats: PDF and JPEG.
- Documents can be dragged to the selected area or added via the **Upload Attachments** button.
- Attachments may only be removed if deleted **BEFORE** submitting the Pre-Approval Report.
    - *Tip*: Click the file in the Attachments 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 4: Add Additional Fund Orgs (top)

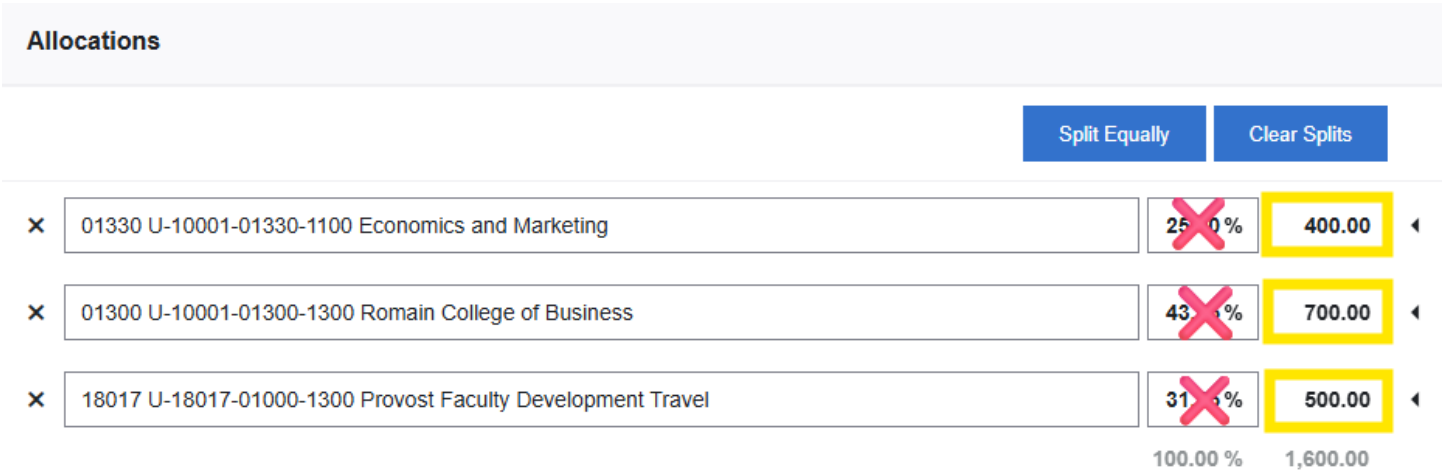
If only one Fund Org is needed for the trip, click Save in the upper right-hand corner and proceed directly to Step 5.

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

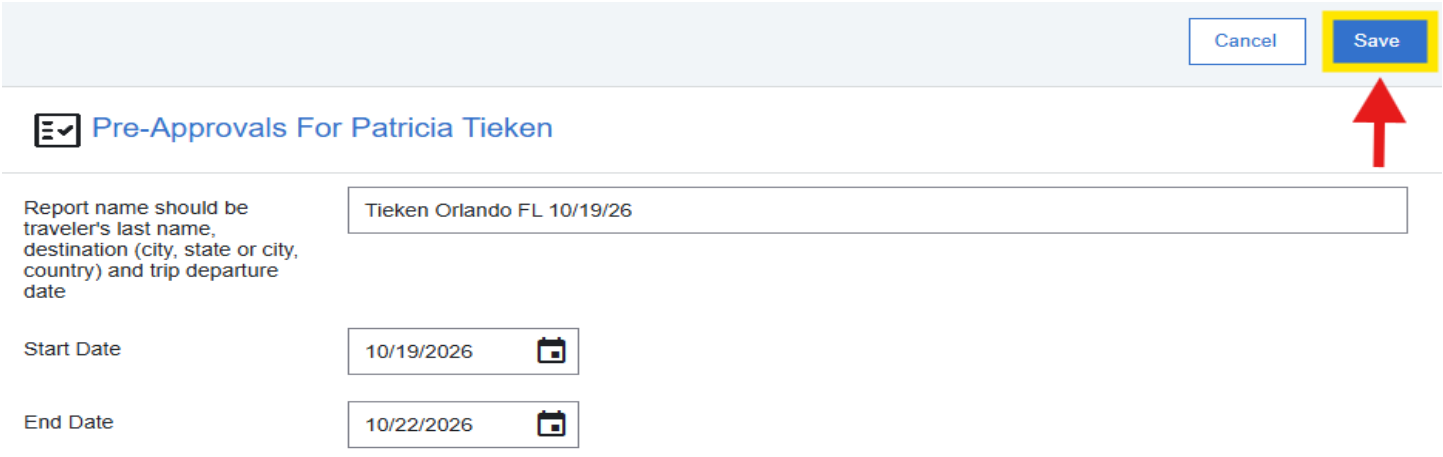


Continue to add Fund Orgs as needed. Then adjust, from the first listed Fund Org to the last (top-down), the amounts being funded by each Fund Orgs.

- 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).

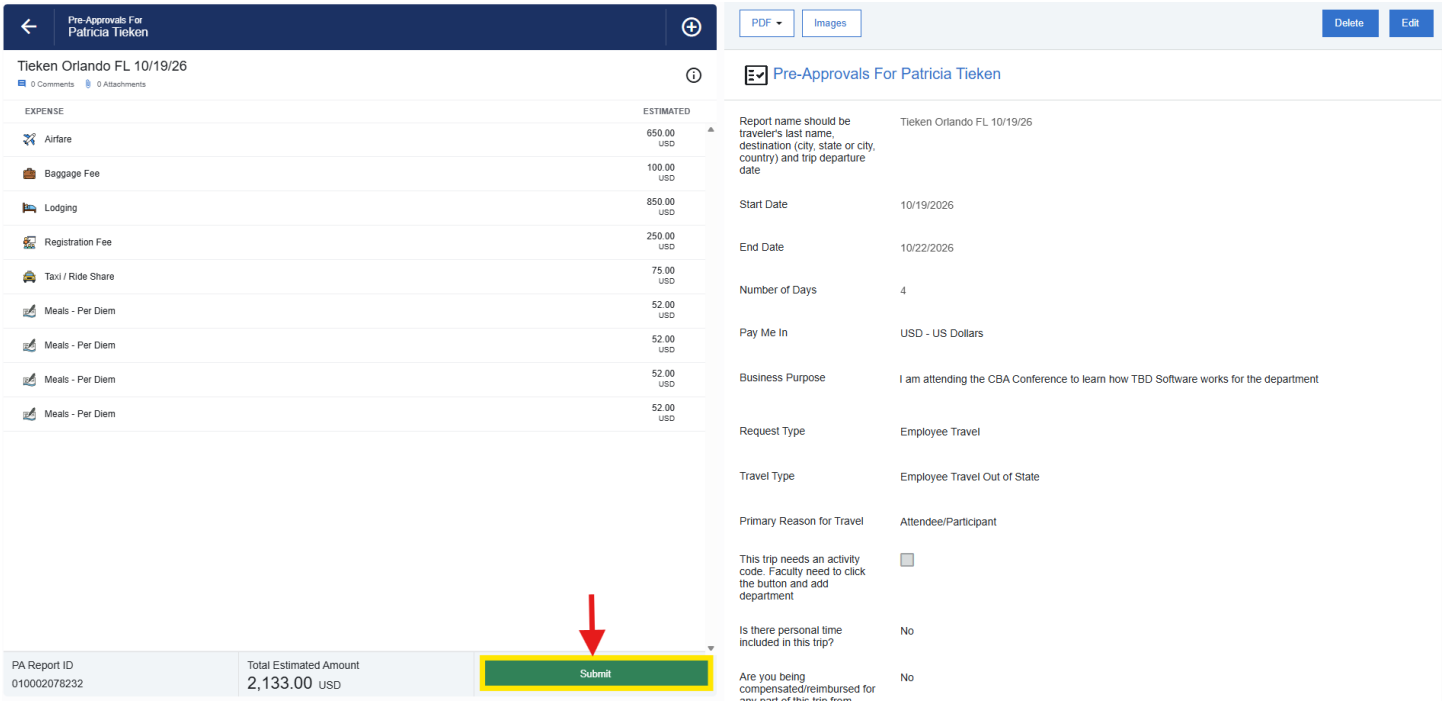


After Comments, Attachments, and Allocations have been added, click **Save**.



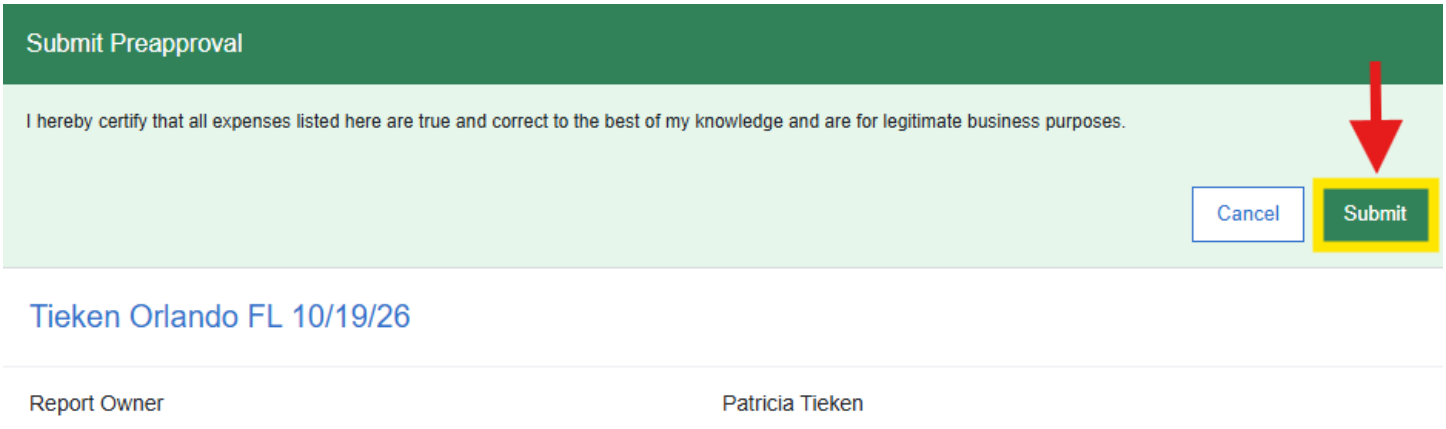
Step 5: Submit the Pre-Approval (top)

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.

