

Create Pre-Approval Report (Candidate)



1. Click the **+CREATE** button in the upper right corner of the Pre-Approval swim lane.



4. Select the specific expense tile you want to add to the Pre-Approval Report




5. Complete the expense form and click save at the top right side of the screen.

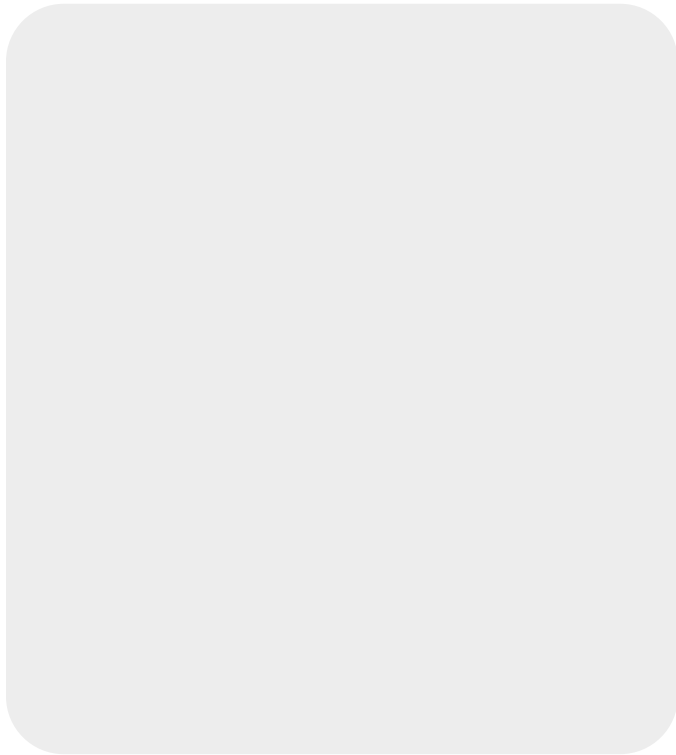
- **Estimated Amount:** Enter the estimated amount and select the appropriate type.
- **Description:** Enter additional information about the expense. This field is optional for

- **To Be Paid By:** Select the option that best describes the anticipated payment method for the expense.

6. The expense will be added to the Pre-Approval Report and will be visible on the left side of the screen. The Add Pre-Approval Types page will appear on the right side of the screen.

7. Continue adding expenses to the report by selecting the appropriate expense tile, completing the expense form, and clicking save at the top right side of the screen.

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8. When you have completed all the entries for the Pre-Approval Report, click the Submit button located at the bottom of the left side of the screen.



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9. A submit confirmation will appear at the top of the right side of the screen.

- **Cancel:** Clicking cancel allows you to return to the Pre-Approval report to make any needed changes. You can chose to leave the report in draft status.
Submit: Once you have read the certification statement, click the Submit button to submit the Pre-Approval report into workflow for approvals.