Request-Pre-Approval for Travel

Pre-Approval Process

Depending on departmental policy, faculty and staff may be required to request pre-approval before going on a trip or incurring an expense.

All exceptions to the Travel and Related Expenses Policy (e.g. upgrade to business class/first class travel) require pre-approval from a Principal, Vice-Principal, or Dean.

This procedure details the steps required to request pre-approval for travel when no cash advance is being requested.

Requesting Pre-approval for Travel

1. In the ERS go to Request, New Request
2. Fill in required fields (red line beside field) for the Request Header
3. Enter estimated expenses information in the Segments tab (i.e. for airfare, train, car, meals, etc.) &/or the Expenses tab
4. Click the Submit Request button
5. Select the Approver for the request (if not already set up as a default)
6. Click the Submit Request button again
7. Once the request has been approved it can be linked to an Expense Report
Request-Pre-Approval for Travel

Segments tab:

Click on one of the icons and enter the information in the required (red bar) fields, scroll down and click **Save**

Expenses tab:

The expense types in the Expenses tab can be used to detail the estimated miscellaneous expenses (e.g. taxi, parking, supplies, etc.)