# Review Expense Reports as a Preview Delegate

As a preview delegate for an approver, you can review expense reports on their behalf and mark them ready for their review and approval.

## 1. Log in to Concur

- Log in to Concur using your credentials.

## 2. Start Delegate Session

- At the top of the home page, click *Profile*.
- In the *Acting as other user* section, use the dropdown menu to select the person you wish to delegate for (Figure 1).

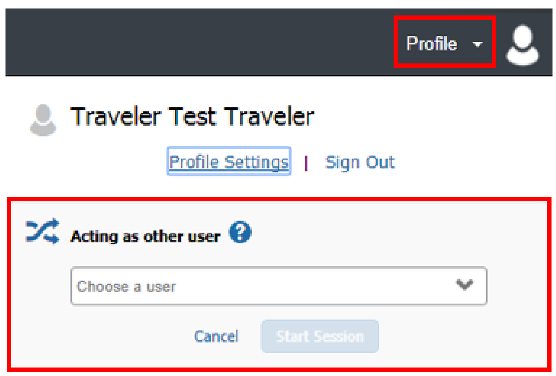


*Figure 1*

- If you are a delegate for more than 10 people, you will have to type their last name in the search bar.
- If you cannot find a user, you may not be assigned as their delegate.
    - For more information, refer to the tip sheet *Assign a Delegate.*
- After selecting a user, click *Start Session*.

## 3. Go to Required Approvals

There are several ways to go to *Required Approvals* from the home page (Figure 2):

- Click *Approvals* in the top menu bar.
- Click *Required Approvals* in the *Quick Task* bar.
- Click *Required Approvals* in *My Tasks*.

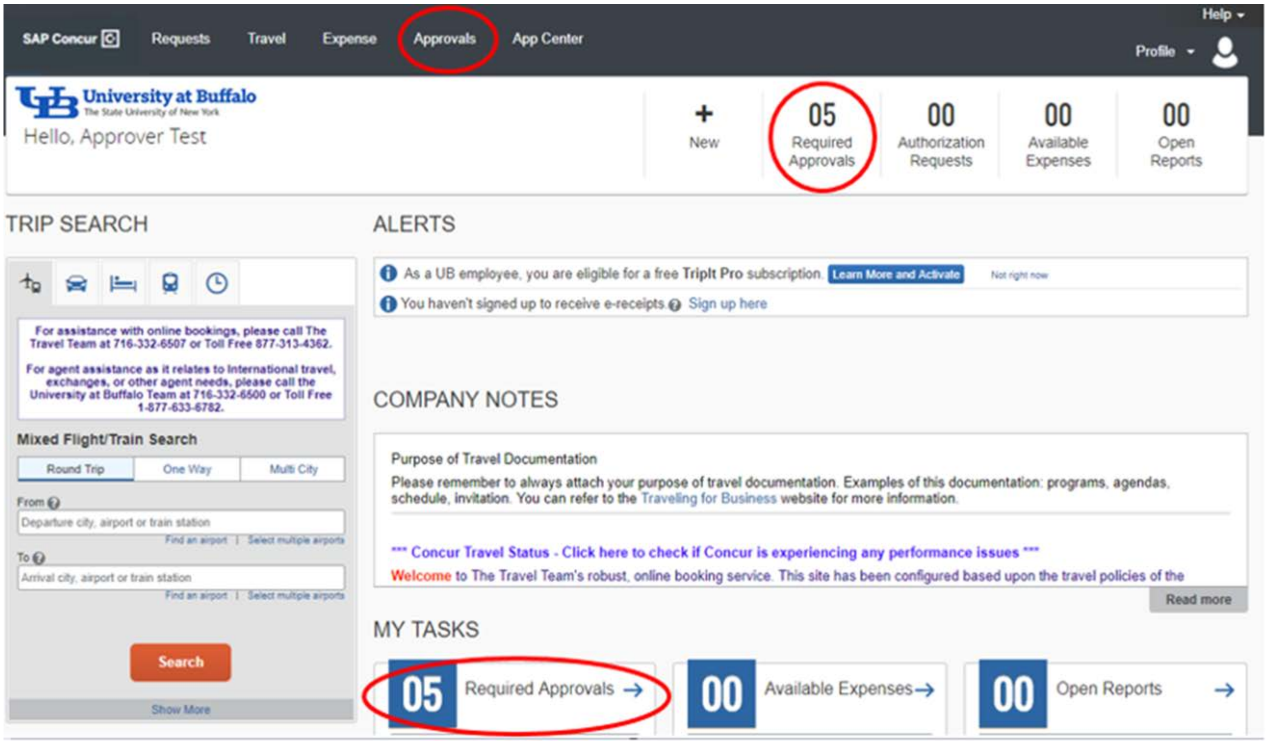


*Figure 2*

## 4. Review Reports Pending Approval

- Select an expense report pending approval. Click on the *Report Name* to open it.
- Review the report header for accuracy and completeness:
  - o Click *Details*, then click *Report Header*.
  - o Review and make changes if needed, then click *Save.*
  - o If no changes need to be made, click *Cancel*.
- Review each expense for compliance.
- Review exceptions for errors on the report:
  - o If an error needs to be corrected by the user, at the top click *Send Back to User*.
  - o Yellow exceptions appear as informational warnings on the report, and may have no action that is required. These will not prevent the approver from approving the report (Figure 3).

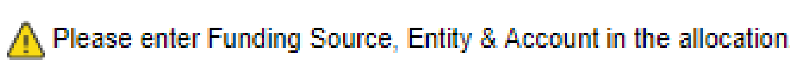


*Figure 3*

*Note:* Preview delegates can review and modify expense reports on behalf of an approver, but cannot approve the reports. Expense reports can only be approved by the approver who they were submitted to.

## 5. Allocate Expenses

- Allocate the expenses on the report to the appropriate account.
- For more information, refer to the tip sheet *Allocate Expenses as a Cost Approver.*

## 6. Click Notify Approver When Report is Ready for Review

- When you are finished reviewing the expense report, at the top click *Notify Approver*.
- The approver will receive an email notification that the expense report is ready for their review.
- The approver will need to log in to Concur to review and submit the report marked with a green icon, which indicates that a preview delegate has reviewed the report (Figure 4).

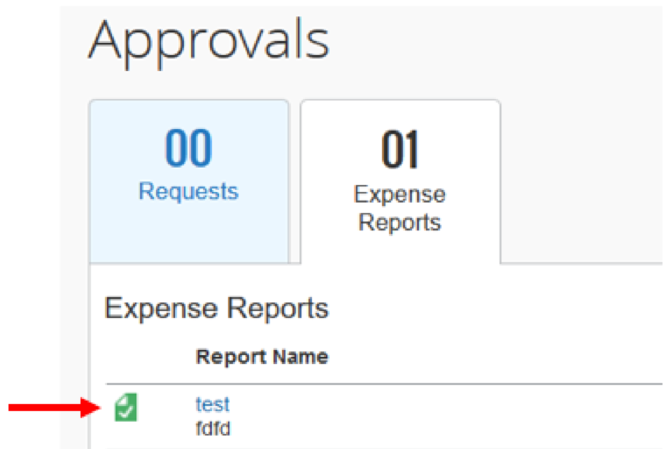


*Figure 4*

## 7. Click Mark as Not Reviewed to Edit a Report

- After you click *Notify Approver*, the button at the top of the report will change to *Mark as Not Reviewed* (Figure 5).

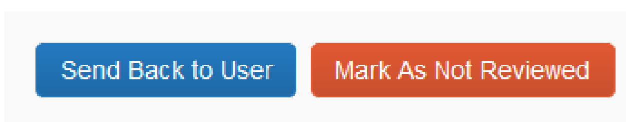


*Figure 5*

- If you need to edit the report before it is approved, click *Mark as Not Reviewed*.
- The approver will see that the report is not ready for review.
- Make changes to the report, then again click *Notify Approver* to notify the approver that the report is ready for their review.

## 8. End Delegate Session

- When you are finished delegating, end the session.
  - At the top of the page, click the *Acting as* button.
  - Click *Done acting for others* (Figure 6).

- The preview delegate session will end and you will return to your profile.

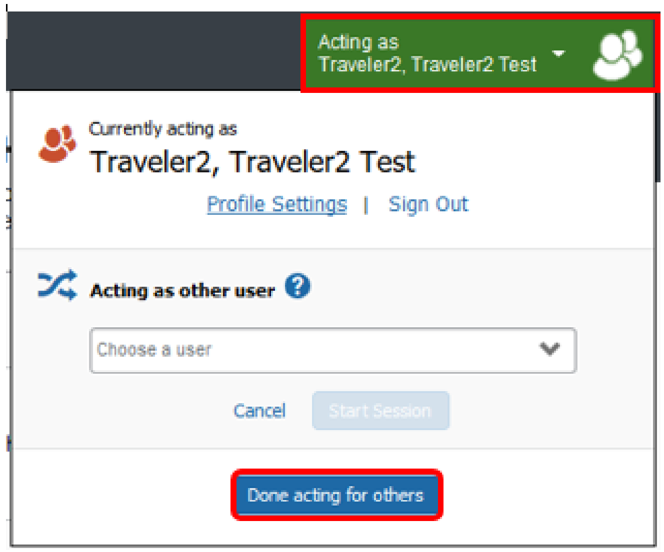


*Figure 6*