Concur Travel and Expense Update

New Delegate Reviewer Option

Expense approvers can select an option that gives a delegate the ability to preview (review) expense reports in their approval queue. The reviewer can check expense reports submitted for approval for things such as proper funding sources, verification of correct allocations, and compliance with internal unit processes. When finished, the reviewer can then notify the approver that the report is ready for their review.

Note: Use of the review function is optional; units determine whether it is appropriate for their internal expense approval business process.

Adding a Delegate Reviewer

The Expense Approver assigns an individual the ability to preview (review) expense reports in their approval queue through the Expense Delegates page settings:

1. In My Concur, click the Profile tab.
2. In the Expense Delegates table, select the Can Preview For Approver check box.
3. Click the Receives Approval Emails to allow the delegate reviewer to receive notification when a report is available in the approver’s approval queue.
4. Click Save.
Delegate Reviewer Procedures

The delegate reviewer can access reports in the approver’s approval queue at any time to complete the review. (Note: The approver can also access the reports and approve them at any time, regardless of whether the report has been reviewed by the delegate reviewer.)

1. Navigate to the approver’s Approval Queue by selecting Expense > Approve Reports and click the Report Name to open the expense report.

2. Review the report summary, details, and receipts. If corrections are needed, select Send Back to Employee, with comments. If sent back, the employee (or his/her delegate) should make the corrections and the employee must resubmit the report.

3. When the review is complete, click Notify Approver.

When Notify Approver is clicked, the Expense Approver receives an email notification that the delegate has completed the review.

In the approver’s queue, an icon displays, indicating that the delegate completed their review.

Note: If the delegate clicks the Mark As Not Reviewed button from the Expense Approver’s queue, the icon is removed from the approver’s Approval Queue but the system-generated email is not recalled and a new email notification is not sent.
Audit Trail

A new action - **Reviewed by Delegate** - displays in the Audit Trail that is visible to the employee, delegate(s), and approver.