RESOLVING SUBMISSION ERRORS – EXPENSE DELEGATES

Overview: When an expense delegate completes an expense report and notifies an employee that the report is ready for review, the expense delegate has options for recalling the report if there are errors or if additional information/expenses should be added to the report. This guide will cover:

• How to address errors identified when the expense delegate selects Ready for Review;
• Change the “Ready for Review” status;
• Recalling an Expense Report.

Scenario 1 – Error Displays when an Expense Delegate Selects Ready for Review

Step 1

The expense delegate completes the expense report and selects Ready for Review. Exception messages display. Warnings should be reviewed. Hard stops must be corrected.

Please note: You will receive an exception message alert indicating if a receipt is not attached. In the Expense, the attach receipt icon identifies expenses that do not have attached receipts. If receipts are required and not attached, once triggered, a hard error message will display until the employee submits the expense report.

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Scenario 1 – Errors display when an Expense Delegate selects Ready for Review

Step 2

A pop-up window displays informing you that the owner (employee), will not be able to submit this report until all errors have been resolved. If you are able to correct the issues, select Resolve Errors and take the appropriate action to resolve the errors. If you cannot resolve errors, ensure the employee understands they are responsible for resolving and select Send for Review.

Please note: This message will most often display if receipts are missing from an expense. Expense delegates should add the appropriate receipts before sending for review. Instructions can be found in the Submitting Receipts QRG. If the employee has not provided receipts, the report should be sent forward for the employee to attach the receipts or, if appropriate, complete the Missing Receipt Declaration before submission.

If an expense report is sent for review without receipts, notice different exceptions appear. In the example below, you will see a message indicating the expense report was submitted by an expense delegate and a hard error message that the receipts must be attached.
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Scenario 2: Changing the “Ready for Review” Status

Step 1
If you notify an employee that an expense report is ready for review and realize there is an error or additional information needs to be added to the report, open the expense report and select Not Ready for Review. This action removes the status associated with an expense report.

Step 2
Continue working on the expense report, making the necessary changes. Once changes are made, select Ready for Review.
Scenario 3: Recalling an Expense Report

Step 1
If an employee has submitted an expense report for approval, the expense delegate can recall the expense report. Open the expense report and select Recall Report. The employee must submit the expense report again to restart workflow.

Step 2
A pop-up box appears asking that you confirm the action to recall the expense report. Select “Yes” to continue with the recall or “No” to cancel.

Step 3
You will briefly see a message confirming the success of the recall. Recall Report will be replaced by Ready for Review. The status of the expense report will display as “Returned” for both the expense delegate and the employee.

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