The Previewer task was designed so an individual can review a request/claim to ensure that the request/claim is ready for the Approver to give final approval.

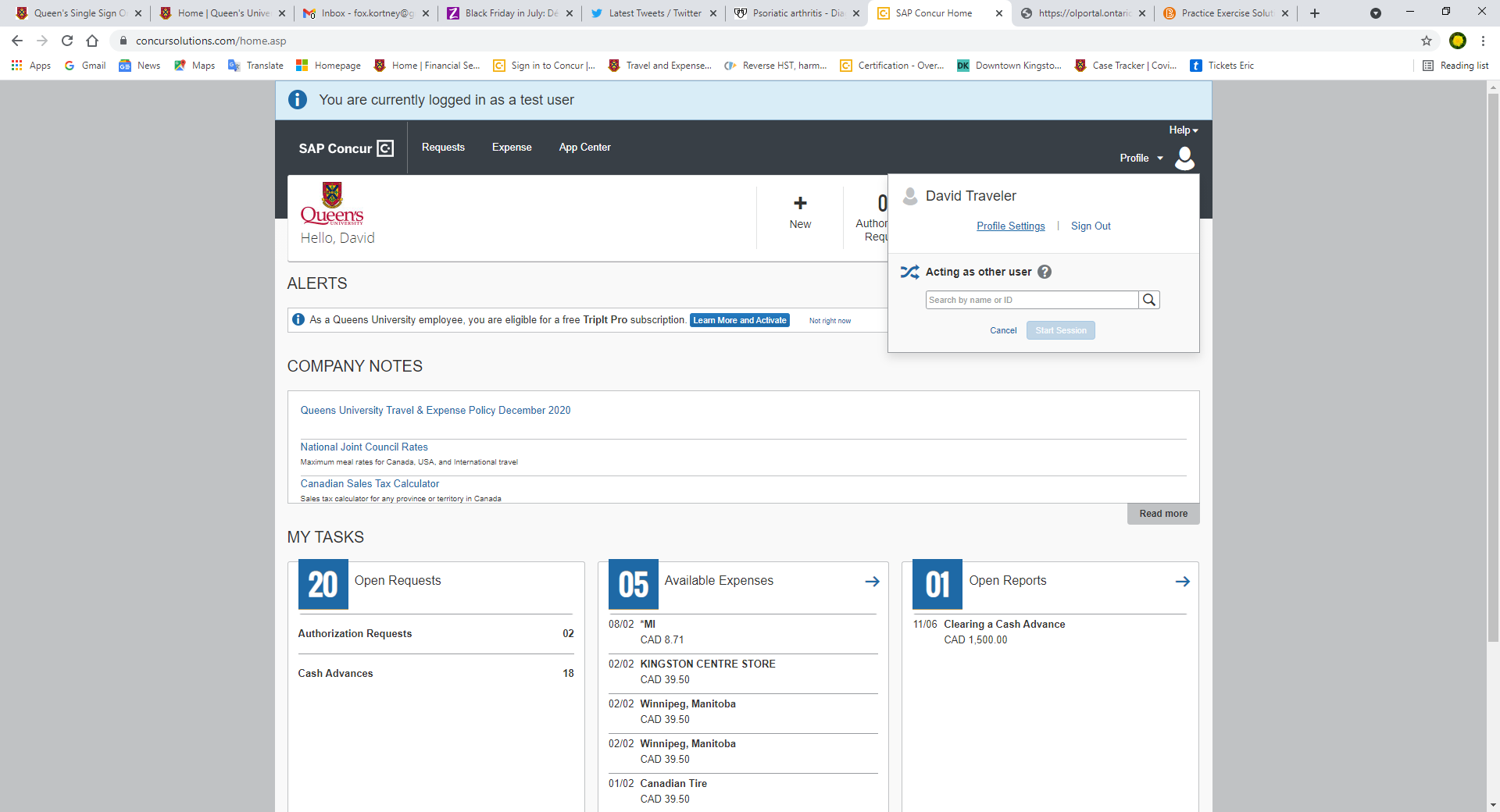
A Previewer can preview claims but not approve them.

Basically, a Previewer will review each request/claim, check for inconsistencies, verify budget, verify receipts, and – if necessary – send back to the employee for corrections. When ready, the Previewer notifies the Approver that the report/request is ready for them.

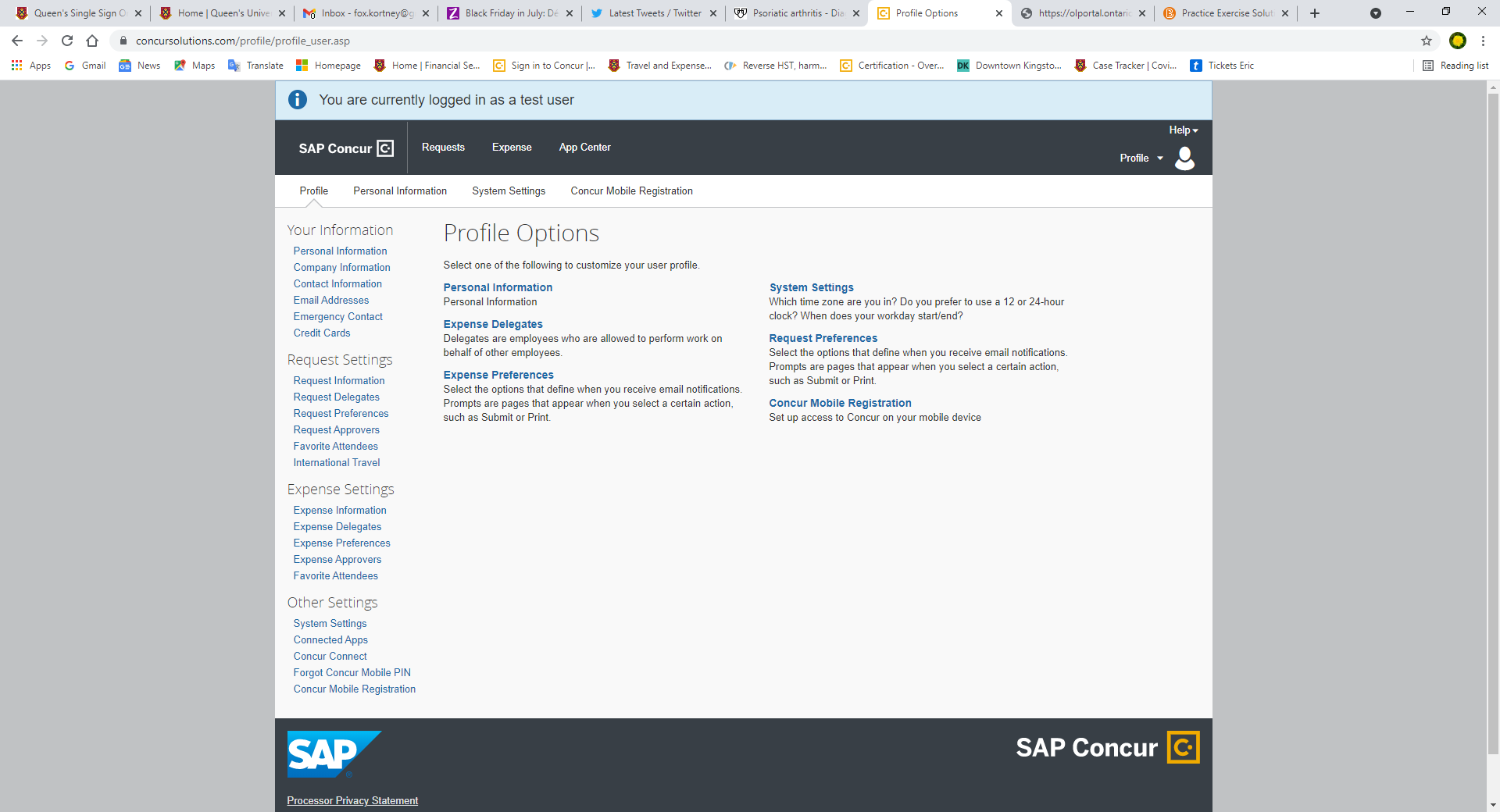
**Assigning a Previewer**

An Approver can assign a Preview by:

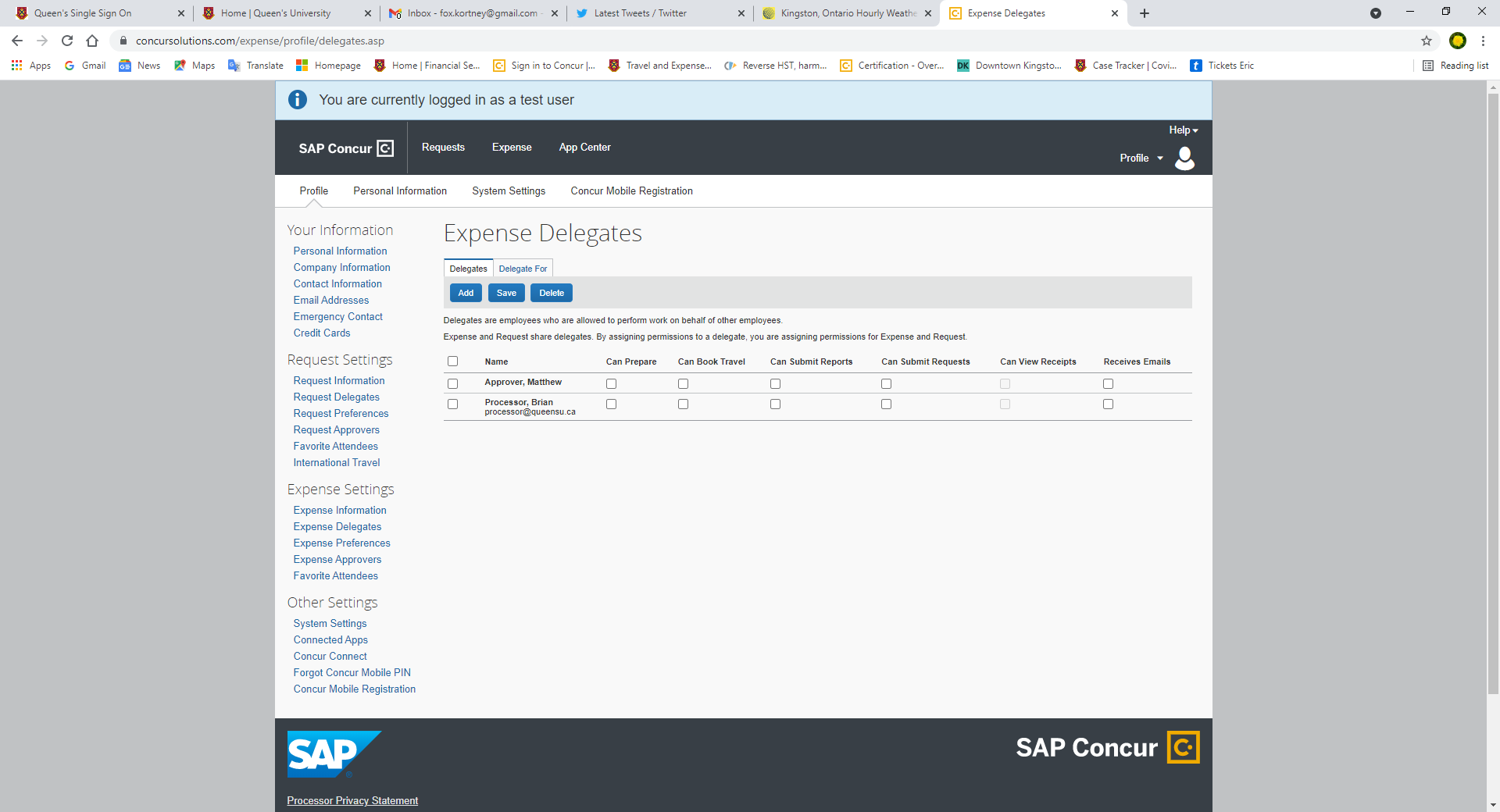
1. Log into ERS.
2. Select the ‘Profile’ drop down menu in the top right corner.
3. Then select ‘Profile Settings’.



1. From the list on the left side of the screen select ‘Expense Delegates’ under the ‘Expense Settings’ section.



1. You will be taken to the ‘Expense Delegates’ page.
2. Select the ‘Add’ button.



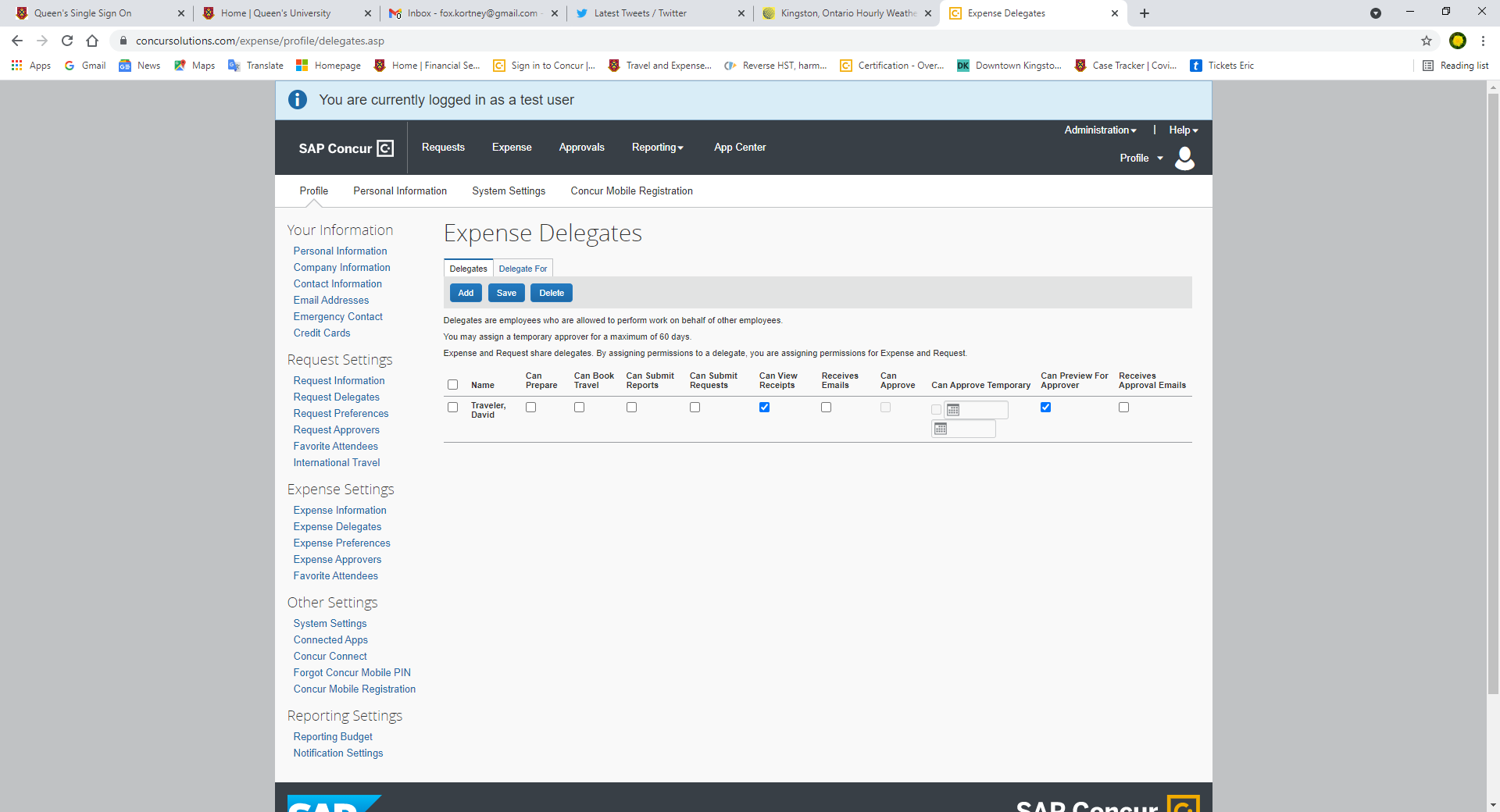
1. A search bar will open.
2. Search for the individual you want to assign as your Previewer by **LAST** name.
   * With hyphenated last names, you may have to try the last name with and without a hyphen OR each name separately.
   * If you cannot locate then, please contact Anthony Boese at [ajb19@queensu.ca](mailto:ajb19@queensu.ca).

Graphical user interface, text, application

Description automatically generated

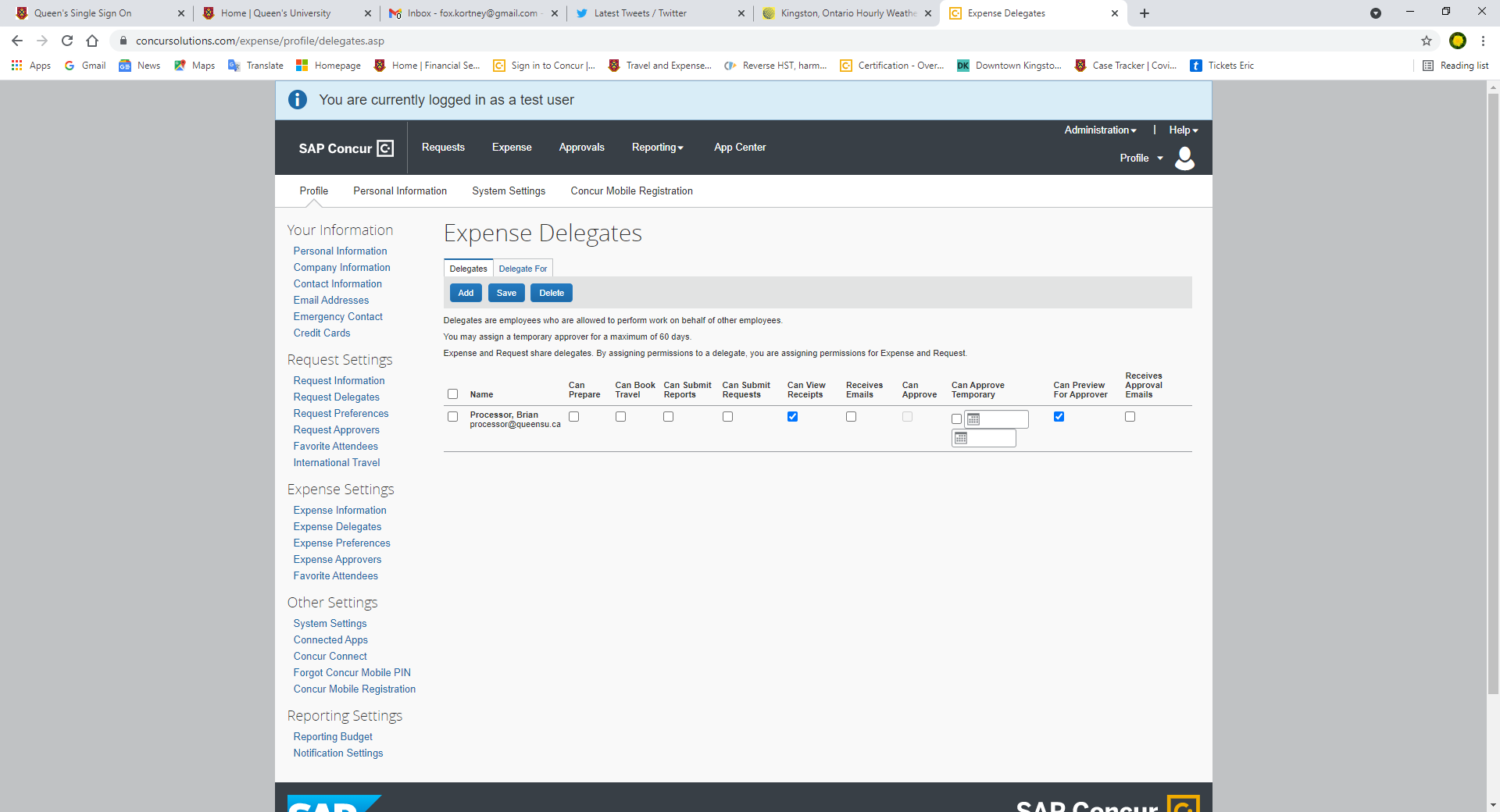
1. Select from the list generated.
2. Once you have selected the name of your Previewer a new line will appear, showing 6 to 10 check boxes. Depending on the access the Previewer has will dictate which boxes are active and what permission you can assign to them.
   * For more information on setting someone up as a Delegate to submit claims and requests or as a Delegate Approver please see the “Procedure – Delegates” document.
3. From the check boxes select ‘**Can Preview for Approver**’ and the ‘**Can View Receipts**’.

*Previewer does not have approver status*



OR

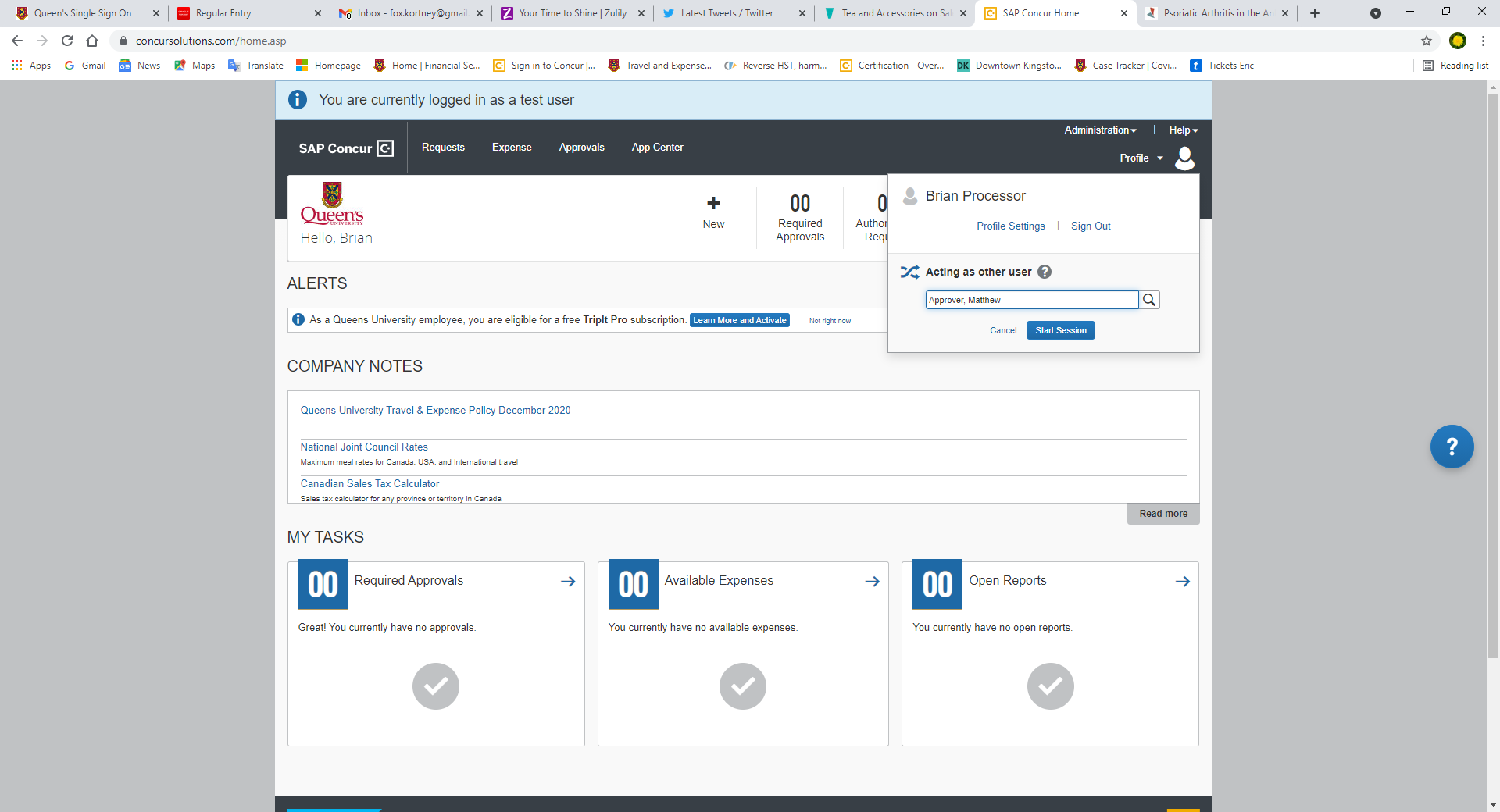
*Previewer has approver status*



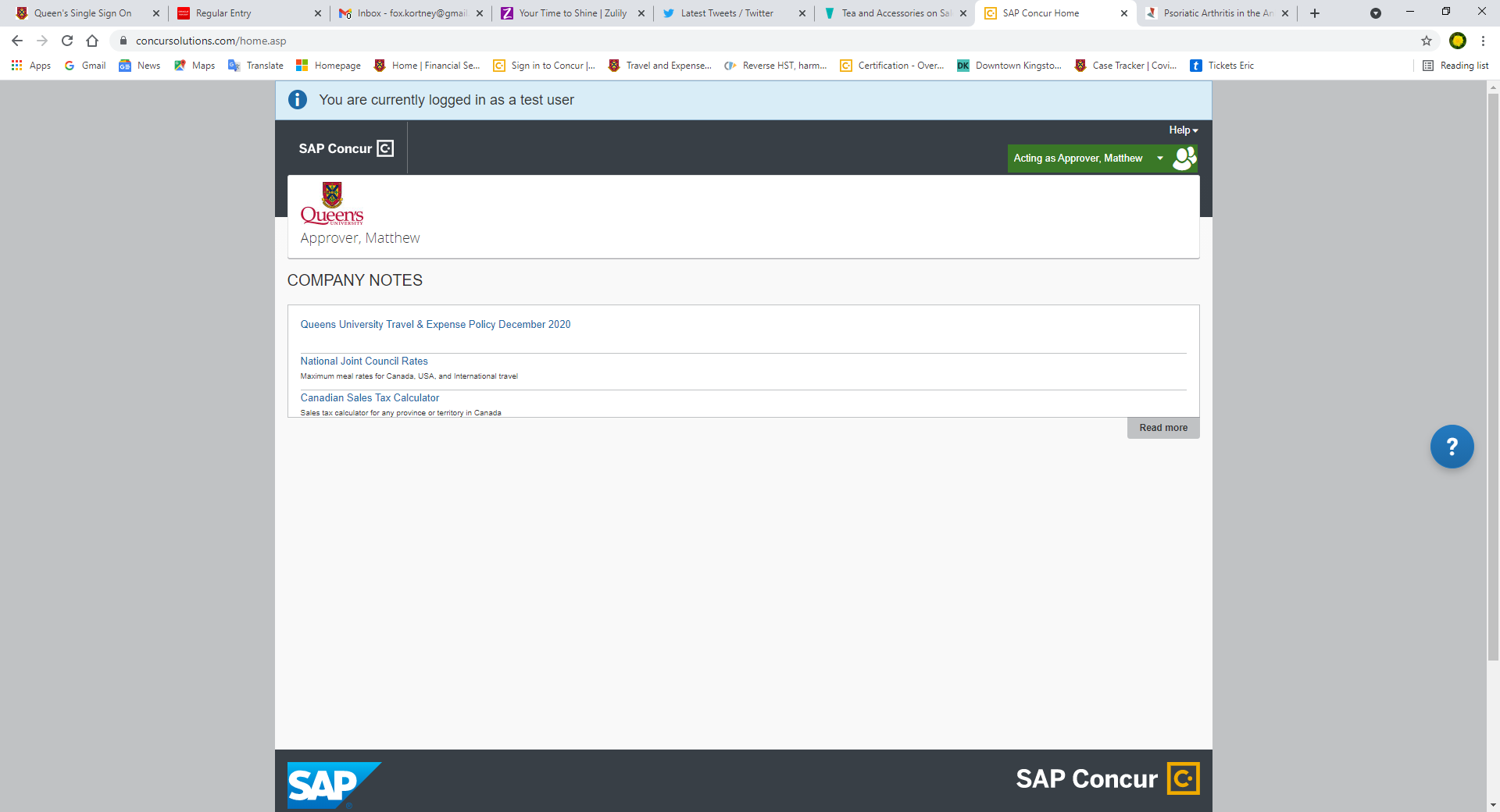
1. To save your choices select the blue ‘Save’ button and your Previewer will immediately be able to preview claims for you.

**Acting as a Previewer**

1. When you get a notice that there is a claim for you to preview, log into ERS.
2. Go to the Profile button in the top right corner. Selecting it will open a window allowing you to search by **LAST** name, for the person you are going to be acting as a Previewer for.
3. Once you have found and selected the correct name, the ‘Start Session’ button will become active. Click it.



1. You will be switched to the Approvers ERS account. You will know that you have been switched over successfully by the green bar showing who you are acting as a previewer for.



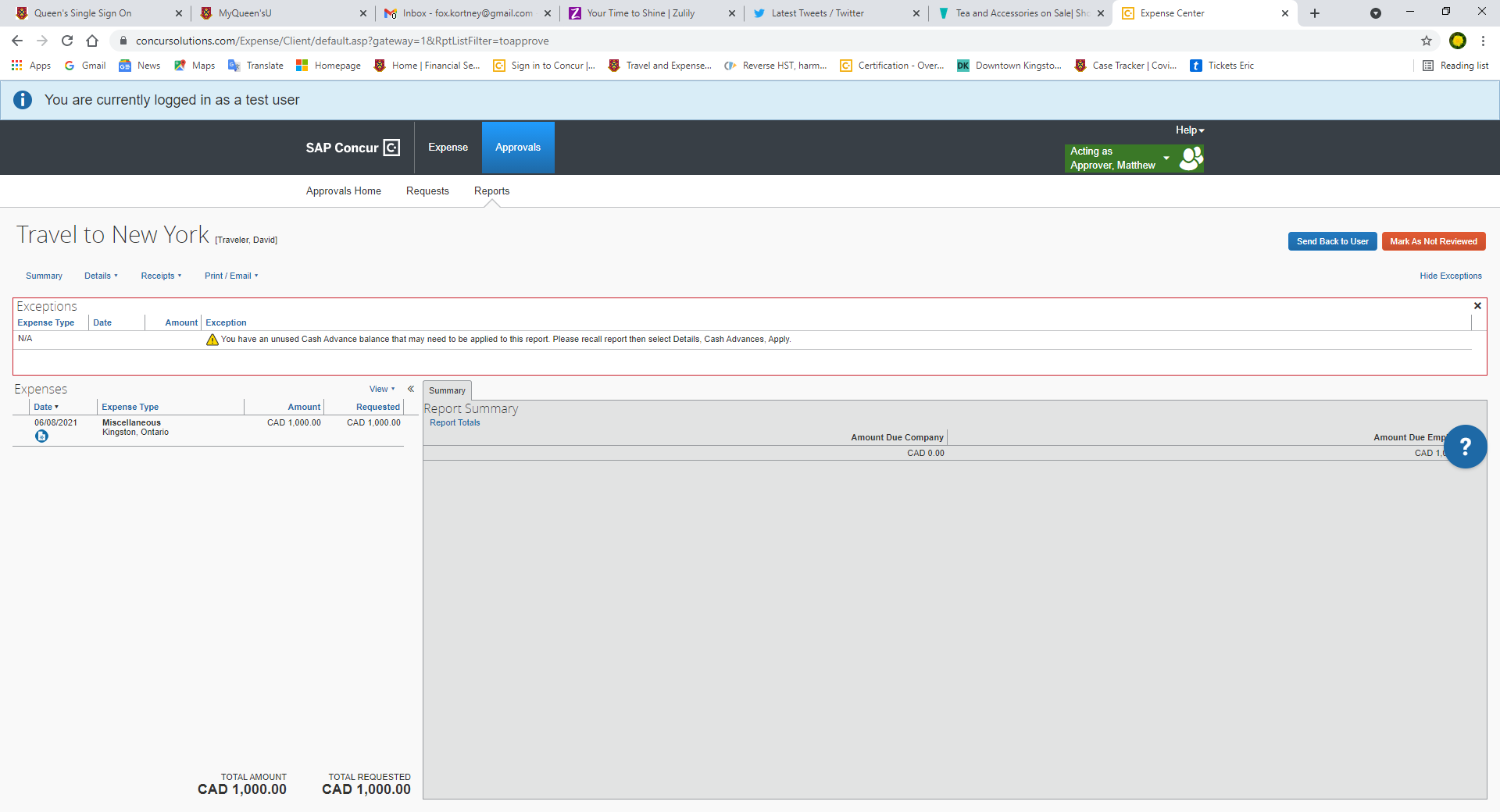
1. Once you ensure you are acting as a Previewer for the correct approver go to the Approvals tab.
2. Depending on what is waiting for approval you will see two or three sub-tabs:
   1. Requests: Cash/Travel Advance
   2. Expense Reports: Travel and Expense Claims
   3. Cash Advance: This tab only appears when there are Research Participant Advance or advances for Indigenous Elder/Participant Payment requests to be approved.
3. Open the request or claim that you want to preview.
4. Review the request/claim ensuring that it meets all requirements.
5. For more detailed information on approving as well as what to look for please see the “Approving” and “Approvers Checklist” documents.
6. A. If request/claim is complete and acceptable you can notify the approver that it is ready for approval by selecting the ‘Notify Approver’ button. This will send an email to the approver telling them that the claim is ready for their final approval.

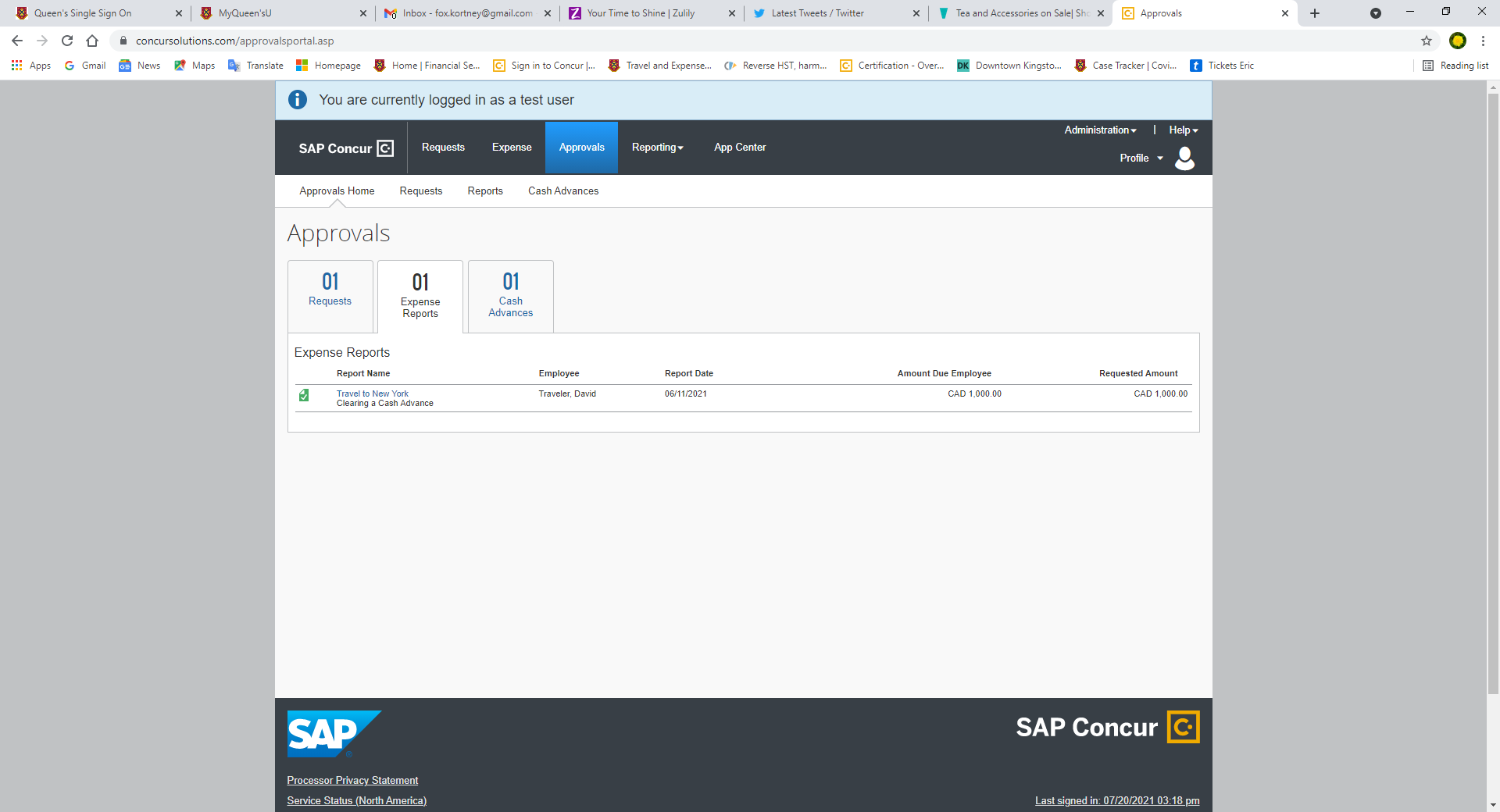
‘Notify Approver’ will change to ‘Mark As Not Reviewed’.

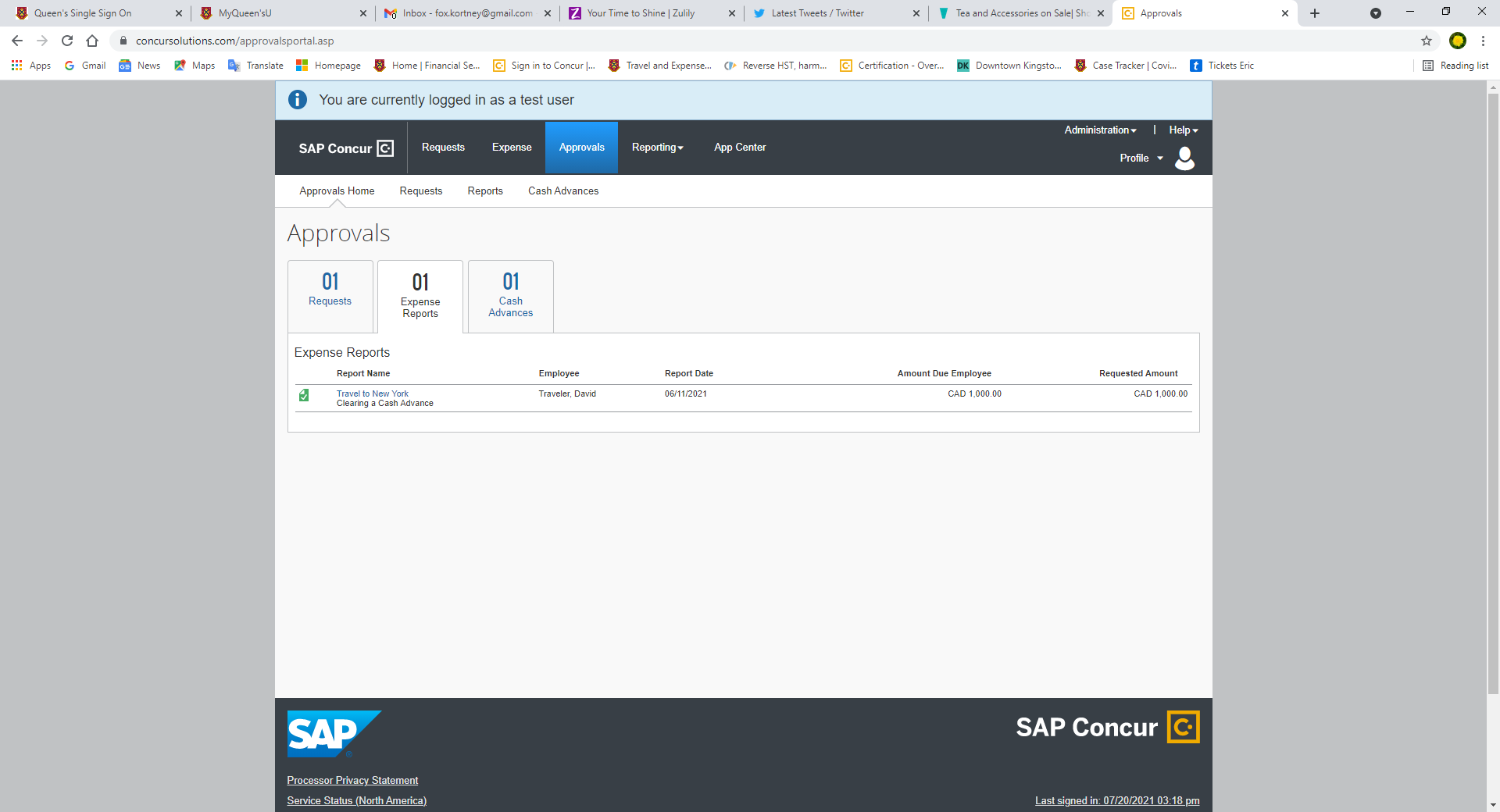
Graphical user interface, text, application, email

Description automatically generated

1. B. If it is not complete or does not meet department/University Standards, you can send it back to the requestor/claimant for further information and updates by selecting the ‘Send Back to User’ button. A new window will open, you will be required to enter a comment/explanation of why it was returned.
2. If you marked the request/claim as ready for approval before it was ready, select the ‘Mark As Not Reviewed’. This will change the status of the claim back so the approver will no longer see it as being Previewed. You can make any changes, send back to the requestor/claimant or notify approver again that the claim is ready.



1.  Now when the Approver logs into ERS any request/claim that has been previewed will be marked with an icon depicting a green page with a check mark in the center.



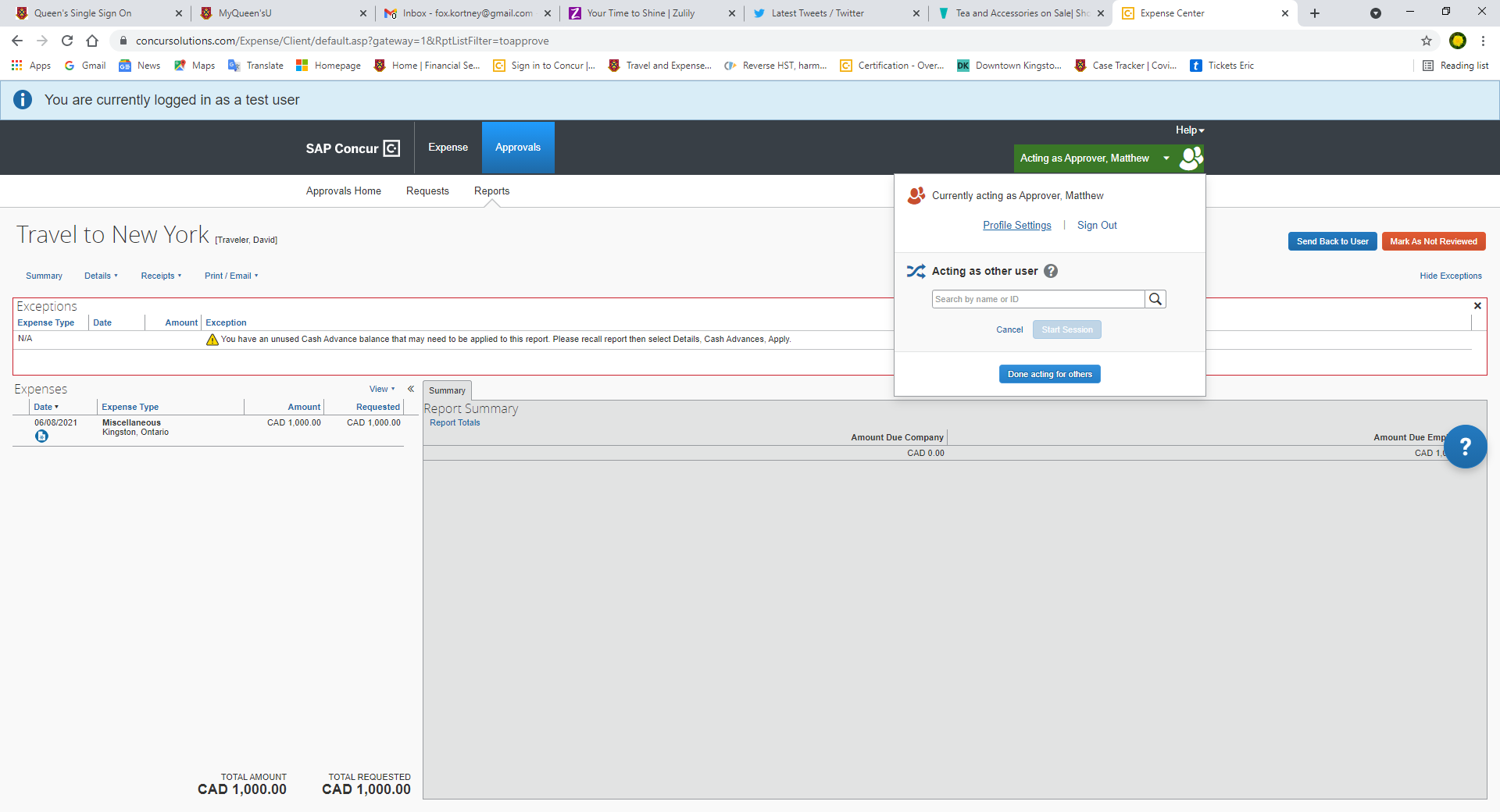
1. The Approver will review the claim and if acceptable approve the claim.
2. The request/claim will then be sent to Financial Services for final review.

**Logging out**

It is very important that you log out of the approvers account when you have finished previewing requests/claims.

Click on the green bar where you see the approvers name.

A window will open, select the blue ‘Done Acting for Others’ button to return to your ERS account.



For more information, please contact [expenses@queensu.ca](mailto:kf39@queensu.ca).