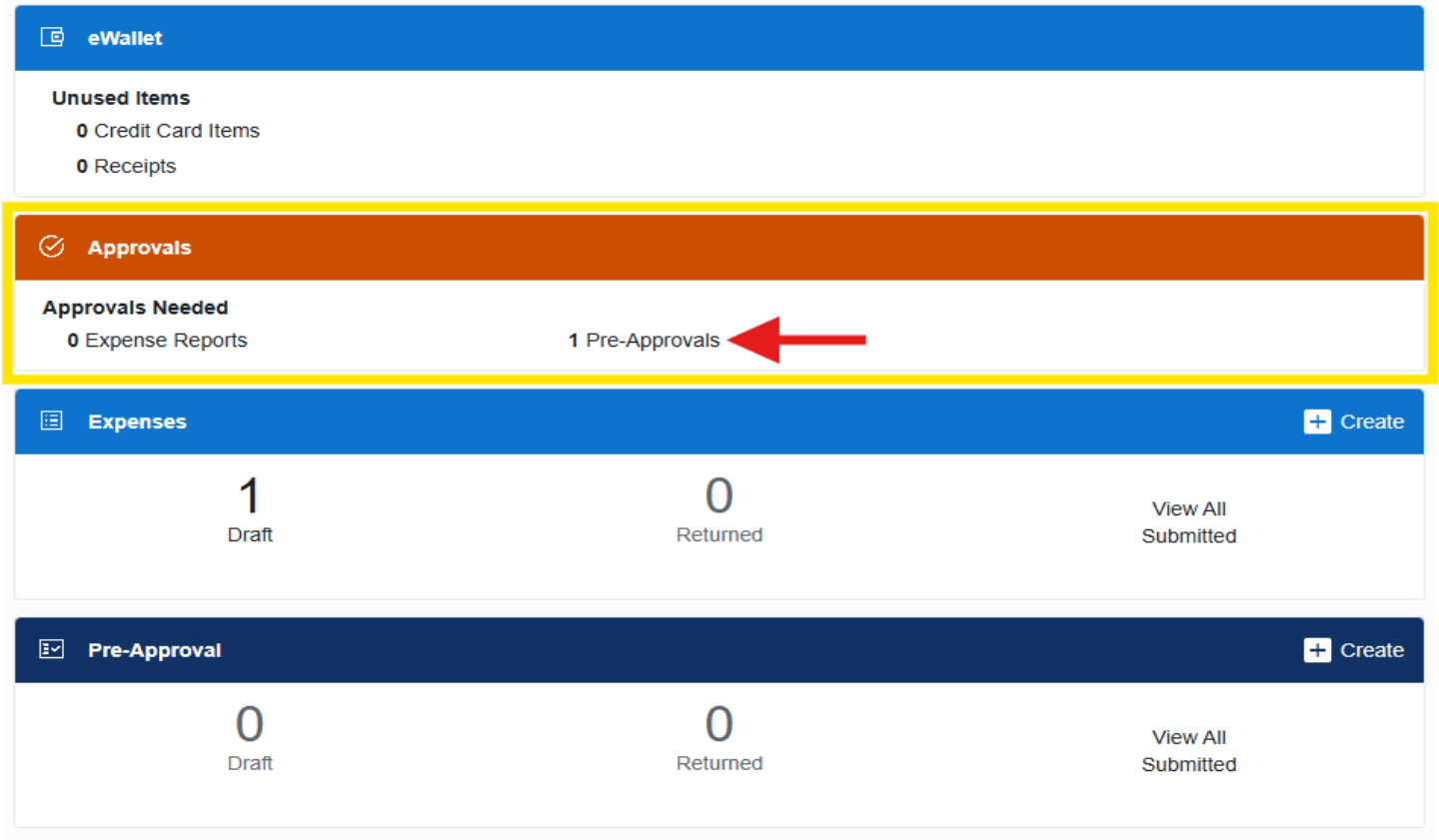
Emburse User Guide:
Approve a Pre-Approval as a Financial Manager

How do I know if I have a Pre-Approval Pending Review?

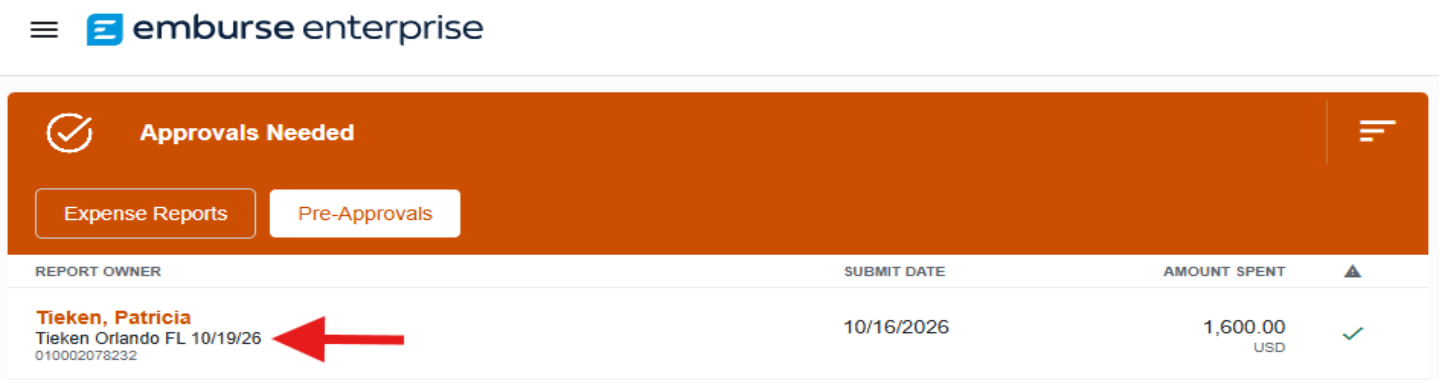
If a document is pending review for approval, then the Approvals ribbon appears on the Emburse home screen. To see the list of pending approval documents, click the **Pre-Approvals** link.



Review a Pre-Approval Request

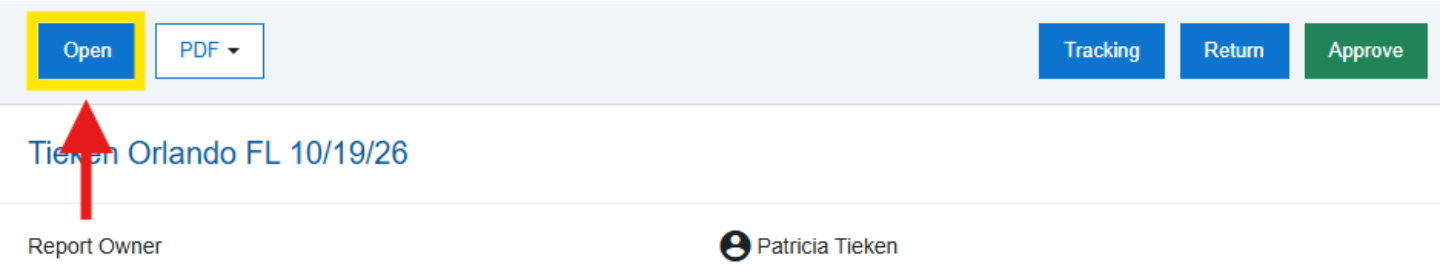
Click the **Pre-Approval** document that needs to be reviewed.

- Note: The description should include the traveler's last name, destination, and trip departure date in the header.



The Pre-Approval Header opens on the right for review. **Scroll down** to assess the Pre-Approval's **Trip Information**, **Comments,** and **Attachments**.

- Note: Click **Open** to open the Pre-Approval in the Pre-Approval Report view, which will provide additional details for each expense estimate.



Comments:
You, the approver, may also add notes to the Comments section. To include notes, enter remarks in the text box provided and click **Post**.

- Note: Notes are visible to **ALL** accessing the report. Once a note is posted, it cannot be deleted.
- Note: If you add a note to the Comments section, the traveler is **not** notified.

Attachments:

- Additional documentation may be added (PDF, PNG, and JPEG formats only).
- Documents may be dragged to the selected area or added via the **Upload Attachments** button.
- When an attachment is added, the image will appear under Attachments.
    - Note: Attachments are visible to **ALL** accessing the report. Once an attachment is uploaded, it cannot be deleted unless the Pre-Approval is returned to the user.

Approve a Pre-Approval

When a review of the Pre-Approval is completed:

- Click **Approve** if no changes/adjustments are needed. The Pre-Approval will proceed to the next approval queue.

