CONCUR TRAVEL

Approver Delegate Previewer Role
Approver Delegate – Previewer Role

• The Previewer Role is a type of Approver Delegate
• Previewers cannot approve Travel Requests and Expense Reports
• Previewers access in Concur will allow them to complete an initial review of the Traveler’s Request and Expense Report to ensure adherence to UNT Travel Guidelines and Departmental Rules.
• After the Previewer has reviewed the Traveler’s Request or Expense Report, the Approver will complete an additional review and then Approve and Submit.
Approver must log into Concur to add a Delegate

Select Profile -> Profile Settings -> Profile Options -> Select Expense Delegates
Expense Delegates

Select Add
Begin typing the last name of the employee that will be assigned the Delegate Role.
To Assign the Previewer Role to a Delegate

Select the checkbox for “Can Preview For Approver”.

“Can View Receipts” will automatically be checked if “Can Preview for Approver” is checked.

“Receives Emails” option can be checked if the Approver would like the Previewer to receive email notifications about pending Approvals.
The next two slides will show what Approvals look like before a review by a Previewer Delegate.

From the Approver’s home screen, select “Required Approvals”
The Approver can review and approve the Request or contact their Delegate and request that it be Previewed.

A Previewer Delegate can be set up to receive email notification of an approval pending.

**Note:** There is no icon indicating that the request has been Previewed.
The Approver’s Delegate Previewer logs in as the Approver to Preview pending Requests.

When the Previewer Delegate has completed review of the Request, they can Select
a) “Send back Request” returning the Request to the employee requesting more information or
b)“Notify Approver” – which will notify the Approver that the Request has been previewed.
A green icon (paper with a check box) indicates that a Request has been Previewed by a Delegate.
By placing the mouse pointer over the icon a pop-up message will appear indicating that the Delegate has Previewed the Request.

Additional review by the Approver can be completed by selecting the Request.

After additional review has been completed, Select Approve.