


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.

SAP Concur  Administration | Help

Requests Travel Expense Reporting App Center Locate

Profile 

Profile Personal Information Change Password System Settings **Concur Mobile Registration** Concur Mobile Devices

Your Information

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers

Request Settings

- Request Information
- Request Delegates
- Request Preferences
- Request Approvers
- Favorite Attendees

Expense Settings

- Expense Information
- Expense Delegates

Profile Options

Select one of the following to customize your user profile.

Personal Information
Your home address and emergency contact information.

Company Information
Your company name and business address or your remote location address.

Credit Card Information
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

E-Receipt Activation
Enable e-receipts to automatically receive electronic receipts from participating vendors.

Travel Vacation Reassignment
Going to be out of the office? Configure your backup travel manager.

Request Preferences
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.


Change Password
Change your password.

System Settings
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Contact Information
How can we contact you about your travel arrangements?

Setup Travel Assistants
You can allow other people within your companies to book trips and enter expenses for you.

Travel Profile Options
Carrier, Hotel, Rental Car and other travel-related preferences.



Expense Delegates 
Delegates are employees who are allowed to perform work on behalf of other employees.

Expense Preferences
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Concur Mobile Registration
Set up access to Concur on your mobile device

Approver must log into Concur to add a Delegate

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

SAP Concur  Requests Travel Expense Reporting App Center Locate Administration | Help Profile 

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Expense Delegates

Delegates Delegate For

 **Add** **Save** **Delete**

Expense Delegates
Select Add

Delegates are employees who are allowed to perform work on behalf of other employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

| <input type="checkbox"/> | Name | Can Prepare | Can View Receipts | Receives Emails |
|--------------------------|------|-------------|-------------------|-----------------|
| No records found. | | | | |

Expense Delegates

Delegates Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

previewer@untsystem.edu - previewer previewer

| | | Can Approve | Can Approve Temporary | Can Preview For Approver | Receives Approval Emails |
|--------------------------|--|-------------|-----------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | previewer@untsystem.edu - previewer previewer | | | | |
| <input type="checkbox"/> | previewer@untsystem.edu | | | | |
| | User ID: 12345678 | | | | |
| | Logon ID: previewer@untsystem.edu | | | | |

No records found.

Begin typing the last name of the employee that will be assigned the Delegate Role

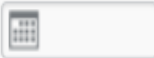
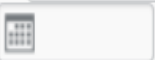
To Assign the Previewer Role to a Delegate

Expense Delegates

Delegates Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

| <input type="checkbox"/> | Name | Can Prepare | Can View Receipts | Receives Emails | Can Approve | Can Approve Temporary | Can Preview For Approver | Receives Approval Emails |
|--------------------------|---|--------------------------|-------------------------------------|--------------------------|--------------------------|---|-------------------------------------|--------------------------|
| <input type="checkbox"/> | previewer, previewer previewer@untsystem.edu | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>  <input type="checkbox"/>  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

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.

Hello, Approver

New Required Approvals Authorization Requests Available Expenses Open Reports

TRIP SEARCH

Booking for myself | Book for a guest

✈️ 🚗 🏠

Flight Search

Round Trip One Way Multi City

From Find an airport | Select multiple airports

To Find an airport | Select multiple airports

Search

Show More

ALERTS

As a UNIVERSITY OF NORTH TEXAS employee, you are eligible for a free Triplt Pro subscription. [Learn More and Activate](#) Not right now

You haven't signed up to receive e-receipts. [Sign up here](#)

COMPANY NOTES

[Concur Training](#)
This link will provide information and training to utilize the Concur Expense System.

[University of North Texas Travel Home Page](#)

[The University of North Texas Pcard Home Page](#)

Read more

MY TASKS

| | | |
|--|---|---|
| 01 Required Approvals → Traveler T. TEST-CAW0003-10/17/18 \$250.00 — Travel | 00 Available Expenses → You currently have no available expenses. | 00 Open Reports → You currently have no open reports. |
|--|---|---|

MY TRIPS (0)

You currently have no upcoming trips.

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"

Approvals

00

Trips

01

Requests

00

Expense
Reports

00

Statement
Reports

Requests

| Request Name | Request ID | Employee | Request Dates | Date Submitted | Total |
|-----------------------|------------|--------------------|--------------------------|----------------|----------|
| TEST-CAW0003-10/17/18 | 333E | Traveler, Traveler | 10/19/2018 10/21/2018 | 10/17/2018 | \$250.00 |



Note: There is no icon indicating that the request has been Previewed.

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.

SAP Concur | Approvals

Support | Help

Acting as Approver, Approver

Approvals Home | Requests | Reports

Request 333E [Traveler, Traveler]

Request/Trip Name: TEST-CAW0003-10/17/18

Business Purpose:

Request Header | Segments | Expense Summary | Approval Flow | Audit Trail

Previous Comment

Entered By Concur System: Passed PreBudget check on 2018-10-17-08:54:19.000000

Request Policy: *UNTS-Travel Not Integrated with Travel

Request/Trip Name: TEST-CAW0003-10/17/18

Booking Type: Booking Outside Concur

Request/Trip Business Start Date: 10/19/2018

Request/Trip Business End Date: 10/21/2018

Request/Trip Purpose: Meeting

Destination City: San Antonio, Texas

Destination Country: UNITED STATES

Travel risk advisory - Low (Level 1)

Trip Type: In-State

Does this trip contain personal travel?: No

Personal Dates of Travel:

Business Purpose:

Comments To/From Approvers/Processors:

Department: (925000) IT Shared Services

Project: NONE

Fund Cat: (200) Designated Operating-Managed

Fund: (830040) Designated Op - Shared Svc

Function: (550) Institutional Support

Program: NONE

Purpose: NONE

Site: NONE

PC Business Unit: NONE

Activity: NONE

User last name: Traveler, Traveler

Cancel | Save | Attachments | Print | Send Back Request | Notify Approver


Status: Submitted & Pending Approval


Amount: \$250.00

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.

SAP Concur  Requests Travel Expense **Approvals** Reporting App Center Support | Help

Profile 

Approvals Home Requests Reports

Approvals


00
Trips

01
Requests


00
Expense Reports

00
Statement Reports

Requests

| Request Name | Request ID | Employee | Request Dates | Date Submitted | Total |
|--|------------|--------------------|--------------------------|----------------|----------|
|  TEST-CAW0003-10/17/18 | 333E | Traveler, Traveler | 10/19/2018 10/21/2018 | 10/17/2018 | \$250.00 |

A green icon (paper with a check box) indicates that a Request has been Previewed by a Delegate.

| Request Name | Request ID |
|---|------------|
|  TEST-CAW0003-10/17/18 | 333E |

Delegate has reviewed this request

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.