


Previewer Role

Preview for Approver: An approver may assign a delegate to “preview” travel documents. The Previewer receives the same approval notices as the approver. This role reviews the Request/Expense and may update funding or send back to the employee for corrections. The Previewer does not approve but clicks the “Notify Approver” button which sends an updated email. A “reviewed” green checkmark icon appears on the Approvals page so the approver knows the document has been reviewed.


- **NOTE:** If the Previewer is ALSO an Approver listed later in the workflow, the email notification may not specify whether they are being asked to PREVIEW for another, or APPROVE (as budget authority for example). If you do not see the document in your own Required Approvals, you can check by delegating in as Previewer for the Approver.

To Act as a Previewer: [Login to Concur](#)

1. In the upper-right of your dashboard, **click Profile drop-down**
2. Select **Act of behalf of another user**
3. Begin typing the name of the approver in the window below to search and select from the list
 - Note: **The approver must assign you as a delegate and enable Previewer permissions** in their Profile Settings. Travel Services can also enable delegate permissions.
4. Click **Start Session**. You are now acting as a delegate for the approver, displayed by the green label “Acting as . . .”
5. **Click Approvals at top of page, or Required Approvals.** Request and Expense Report documents are separated on tabs. The number indicates the total pending approval.
6. **Click Requests or Expense Reports tab**
7. **Click the Request or Report Name**
8. **Review the information** on the Header tab
 - **Supervisory approval-** approves the business need for the trip and the time away from regular work duties.
 - **Budget Authority (Cost Object Approvers)** reviews funding and expenses.
9. **Click the Expense Summary tab to review the requested expenses. If visible, hover over the allocations icon**  to review the amount charged to your budget.
 - Note: you may only be approving a portion of the request.
10. **To change funding or allocations,** click “Allocate” then “Allocate Selected Expenses” and edit as needed.
11. **View Approval Flow** (found in **Details** on Expense Reports)
 - Note: you can Ad Hoc additional approvers on the Approval Flow tab
12. **If document is correct,** click the orange “**Notify Approver**” button in the top right.



Travel Services

SAP Concur 

13. **If corrections are needed**, select **“Send Back Request”**. Include instructions for changes in the comment.
14. To **Return to working for yourself**, click **“Acting as . . .”** and Click **Done Acting for others**