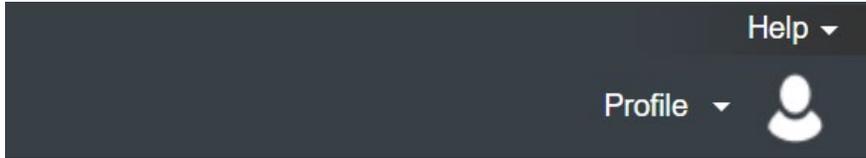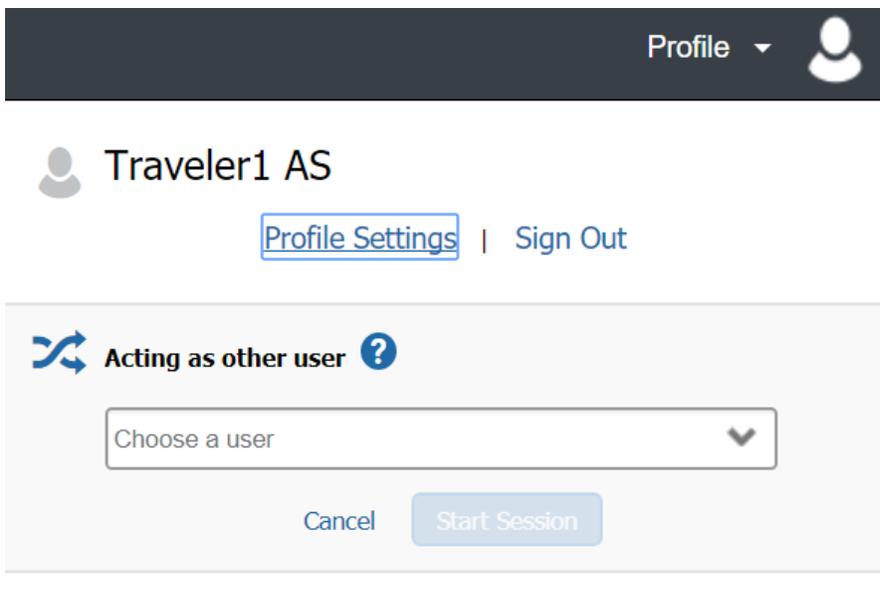# QUICK GUIDE: PREVIEWER GUIDE

HOW TO START A SESSION AS A DELEGATE

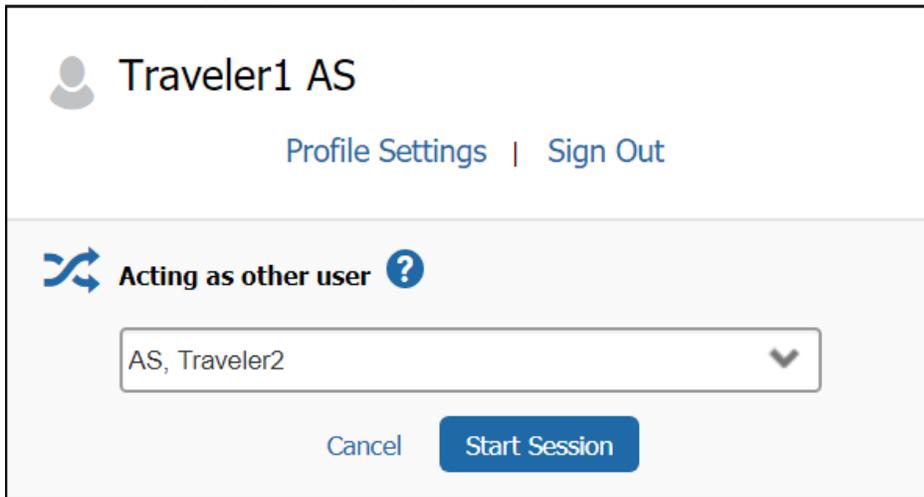At the top of the main menu, click on the Profile drop down arrow:

Concur will bring up a space for you to use the drop down to search or type in the last name of the approver:

For delegates with multiple travelers, if a list does not appear start typing in the last name of the approver.
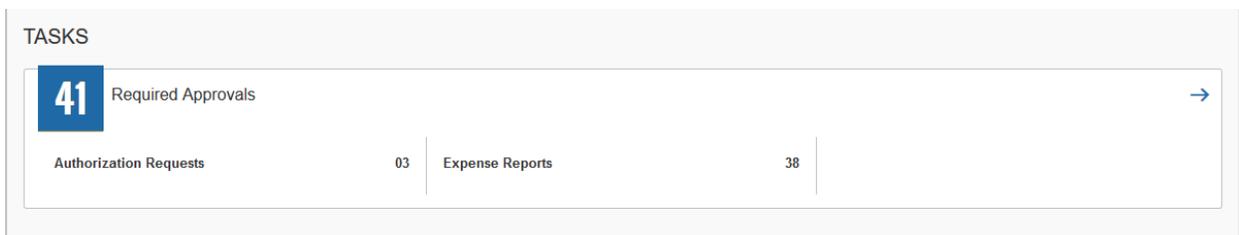
Choose the appropriate approver, and click the "Start Session" button:

PREVIEWING TRAVEL REQUESTS

- Under Tasks, you will see a box that says "Required Approvals".

- Click on the term "Required Approvals"
- Concur will take you to the Approvals screen. Click on the Requests tab. The number on the tab is how many requests you need to preview
- Click on the Request Name you would like to preview.
- The first tab is the Request Header, which includes the trip name, dates of travel, trip purpose, destination, default funding source, and any cash advance information.
- The second tab is the Expense Summary tab, which gives you an estimated breakdown of all of the expenses.
- You may see several icons on this screen:
  - A yellow triangle is information for you to know, like the fact that there is a memo required for airfare requested 14 days or less before travel, or that an advance is part of the request.

- A blue circle icon means that there is a comment. Hover over the icon to bring up the comment for you to read.
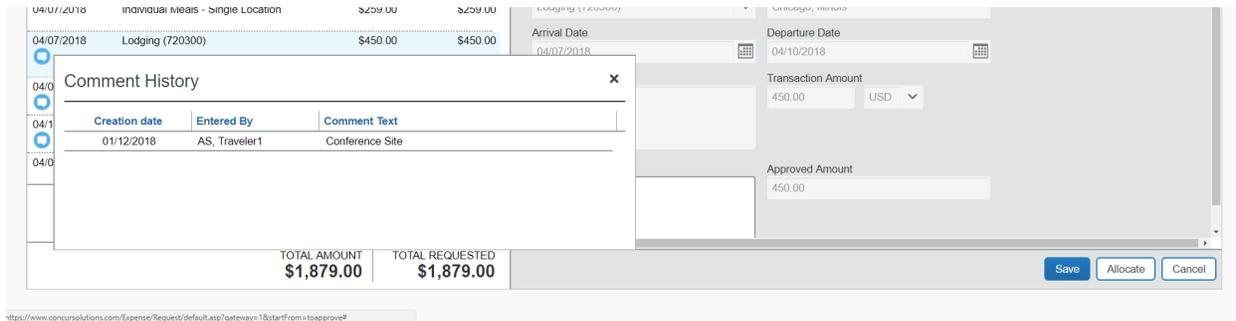
- A pie chart icon means that the expense has been allocated between two or more FOAP's. Hover over the icon to see how the expense is being charged.
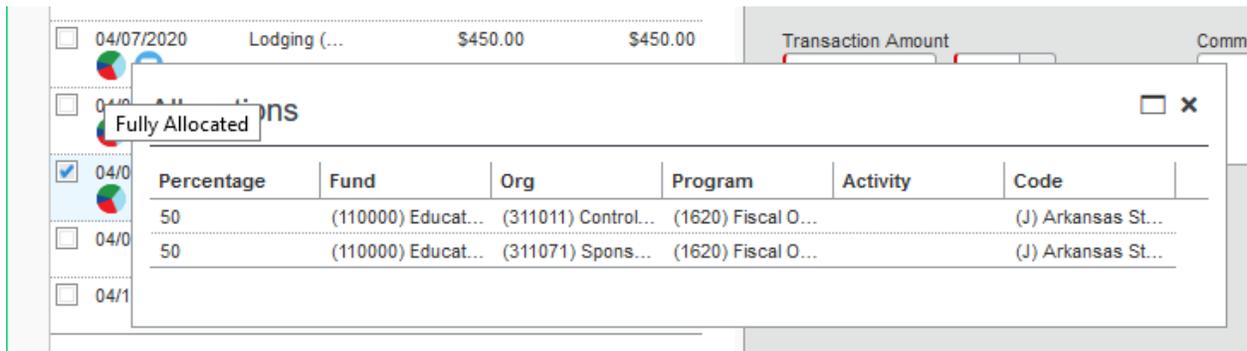
- Click on the "Attachments" icon to see if there are any memos or backup attached. Then, click on "View Documents in a new window". If you have pop-up blocker set up in your browser, you will have to allow pop-ups from www.concursolutions.com.
- If you need to send the request back to the traveler to fix something, click on the "Send Back Request" button and enter the reason in the Comments field before clicking "OK".
- If you are ready to send the Request to the approver, click "Notify Approver". The Approver will receive an email letting them know the Request is ready for them to review and approve.

Status: Submitted & Pending Supervisor/Chair Approval
Amount: $10.00

- When an approver looks at the list of Requests in approvals, there will be a green page with a checkmark on it if you have completed the preview and clicked the "Notify Approver button.

		Request Name	Employee Name
☐	✅⚠️	Audit Rule Test	AS, Traveler2

PREVIEWING EXPENSE REPORTS

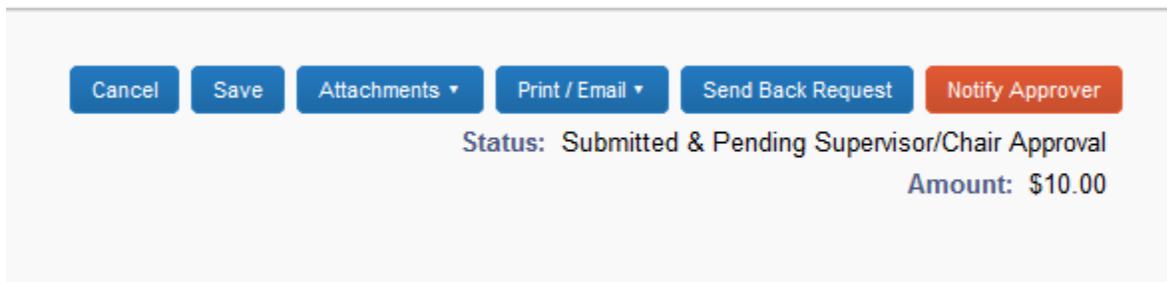- Under Tasks, you will see a box that says "Required Approvals".

TASKS

41 Required Approvals →

Authorization Requests 03 | Expense Reports 38

- Click on the term "Required Approvals".
- Concur will take you to the Approvals screen. The number on the tab is how many expense reports you need to preview.
- Click on the Report Name you would like to preview.
- Concur will automatically open the Expenses tab, which gives you a breakdown of all of the expenses.
- You could see several icons on this screen:
  - A yellow triangle is information for you to know, like the fact that there is a memo required for airfare requested 14 days or less before travel, or that an advance is part of the request.
  - A blue circle icon means that there is a comment. Hover over the icon to bring up the comment for you to read.

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- A pie chart icon means that the expense has been allocated between two or more FOAP's. Hover over the icon to see how the expense is being charged.
- A blue icon with a piece of paper in the center means that there is a receipt image(s) attached. Hover over the icon to see the receipt image(s).
- If you need to see the header information or itinerary information, click on "Details", then "Report Header" or "Available Itinerary".
- If you need to send the report back to the traveler to fix something, click on the "Send Back to User" button and enter the reason in the Comments field before clicking "OK".
- If you are ready to send the Request to the approver, click "Notify Approver". The Approver will receive an email letting them know the Request is ready for them to review and approve.

- When an approver looks at the list of Requests in approvals, there will be a green page with a checkmark on it if you have completed the preview and clicked the "Notify Approver button.

Updated February 2020