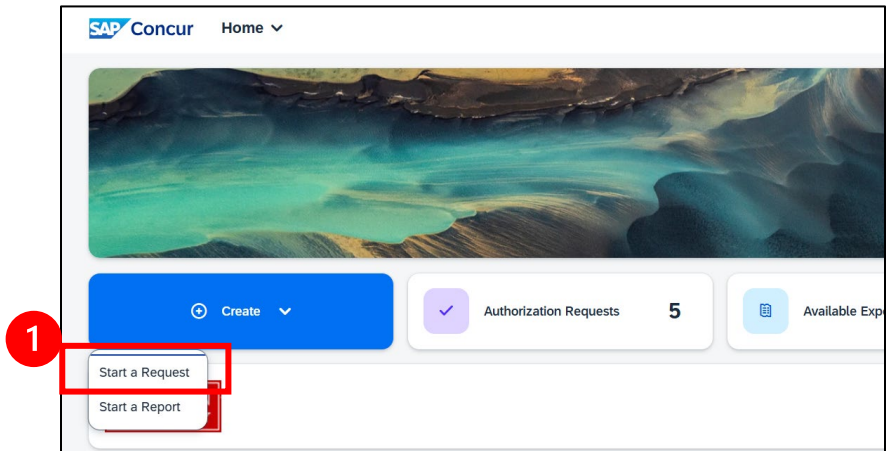
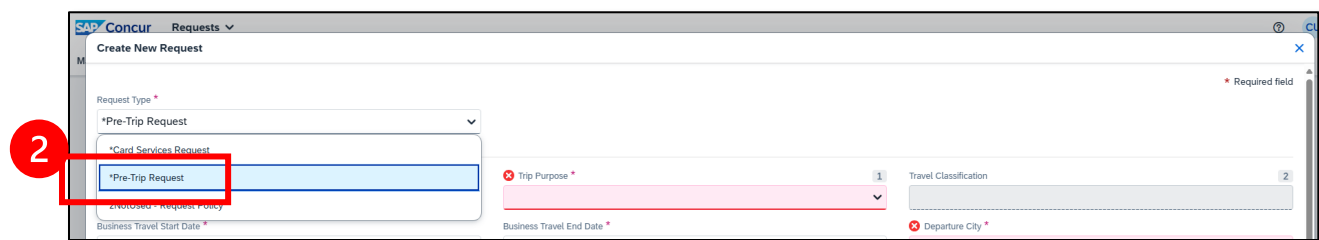


PRE-TRIP APPROVAL REQUEST

1. Click **Create** on the Concur home page and select **Start a Request**.



2. Click on the Request Type drop-down menu and select **Pre-Trip Request**.



3. Complete required fields. Note: Business Travel Start Date and End Date must align with dates of actual travel.

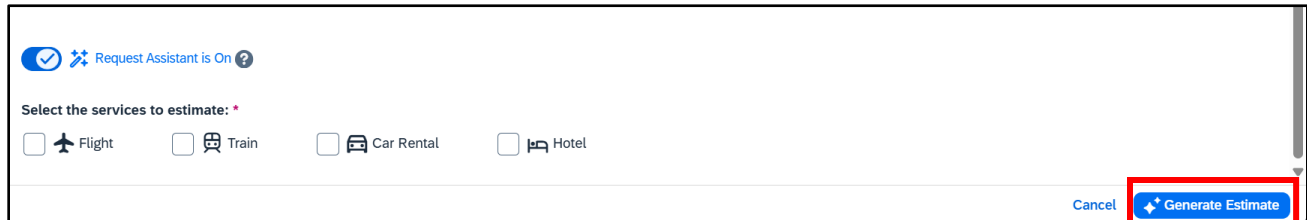
This is a detailed view of the 'Create New Request' form. It contains several sections of input fields:

- Trip Information:** Trip Name, Trip Purpose (dropdown), Travel Classification (dropdown), Business Travel Start Date (calendar), Business Travel End Date (calendar), Departure City (dropdown), Main Destination City (dropdown), Main Destination Country/Region (dropdown with 'Search by Country/Region' option), and 'Will this trip include personal travel?' (dropdown).
- Checkboxes:** 'Does this trip involve multiple destinations?' and 'Spousal Travel included?'.
- Personal Travel Dates:** A text input field.
- Cost Object:** Cost Object (dropdown, currently showing '(1060260000) Procure to Pay (P2P)'), Cost Object Approver Name (dropdown), and 'Will this trip be charged to a grant/sponsored program?' (dropdown, currently showing 'None Selected').
- Comment:** A large text area for entering a comment.
- Request Assistant:** A status indicator 'Request Assistant is On'.
- Services to Estimate:** Checkboxes for 'Flight', 'Train', 'Car Rental', and 'Hotel'.

At the bottom right, there are 'Cancel' and 'Generate Estimate' buttons.

- To view a cost estimate, leave the “Request Assistant” on, select the appropriate services (flight, train, car rental, hotel), and click “Generate Estimate.” If you do not wish to view a cost estimate, uncheck the box for the “Request Assistant” to turn it off and then click “Create Request”.

Request Assistant on:



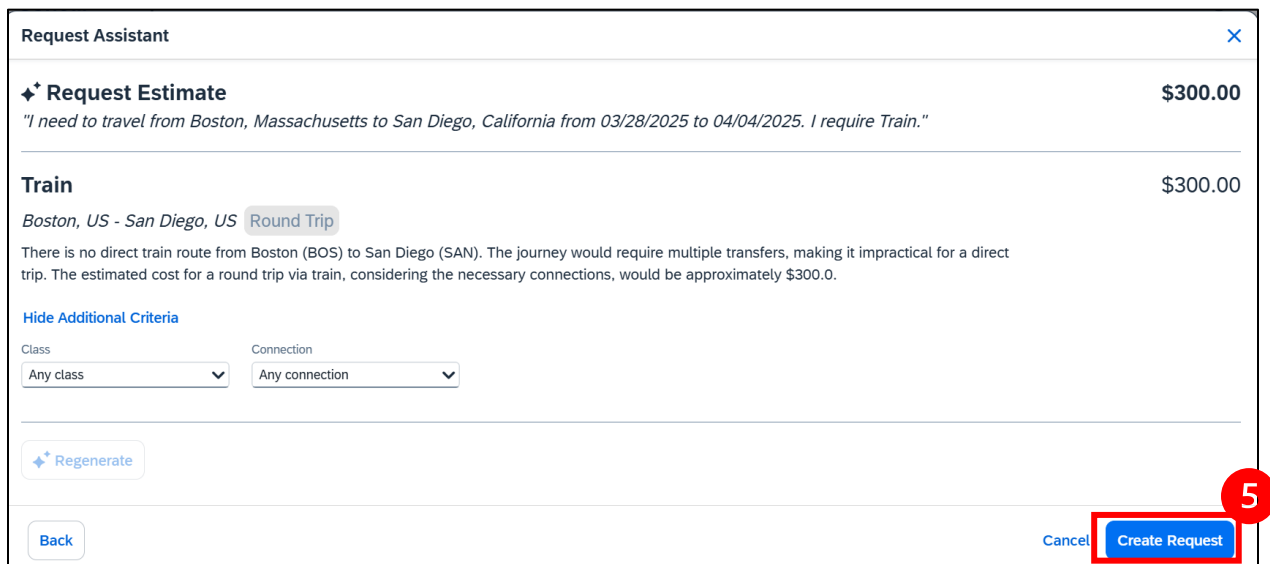
The screenshot shows the 'Request Assistant' interface with the toggle switch turned on. Below the toggle, there are four service selection options: Flight, Train, Car Rental, and Hotel, each with an unchecked checkbox. At the bottom right, there is a 'Cancel' button and a blue 'Generate Estimate' button with a star icon, which is highlighted with a red box.

Request Assistant off:



The screenshot shows the 'Request Assistant' interface with the toggle switch turned off. At the bottom right, there is a 'Cancel' button and a blue 'Create Request' button with a star icon, which is highlighted with a red box.

If you used the Request Assistant tool to generate an estimate, review the Request Estimate and make adjustments as needed. Click “Create Request” to submit your request for approval.



The screenshot shows the 'Request Assistant' window displaying a 'Request Estimate' for \$300.00. The estimate details include: 'Train' for 'Boston, US - San Diego, US Round Trip' with a cost of \$300.00. A note states: 'There is no direct train route from Boston (BOS) to San Diego (SAN). The journey would require multiple transfers, making it impractical for a direct trip. The estimated cost for a round trip via train, considering the necessary connections, would be approximately \$300.0.' Below this, there are dropdown menus for 'Class' (Any class) and 'Connection' (Any connection). At the bottom, there is a 'Regenerate' button, a 'Back' button, a 'Cancel' button, and a blue 'Create Request' button with a star icon, which is highlighted with a red box. A red circle with the number '5' is positioned over the 'Create Request' button.

- Once the request has been submitted, it will be listed in your “Expected Expenses.” Click **(+) Add** to include additional trip details (e.g., airfare, car rental) and estimated amounts for each expense in your initial request. Click **Save** each time you add a new expense.

Manage Requests

Home / Requests / Manage Requests / TEST

TEST \$300.00 Submit Request Delete Request

Not Submitted | Request ID: 3CXM

Request Details ▾ Attachments ▾

EXPECTED EXPENSES

+ Add ✖ Edit ✖ Delete ✖ Allocate

<input type="checkbox"/>	Expense type↑↓	Details↑↓	Date↑↓	Amount↑↓	Requested↑↓
<input type="checkbox"/>	Train	Boston, Massachusetts - San Diego, California : Round Trip	03/28/2025	\$300.00	\$300.00
					\$300.00

Add expected expenses and/or travel plans ×

Search by expense type, category, description

+ Collapse All Sections

- ^ **01. Travel Expenses**
 - Accommodations
 - + **02. Transportation**
 - Airfare
 - Car Rental
 - Train
- + **03. Meals**
 - Business Meals (513500, 513700)
 - Entertainment (516050)
 - Meetings (513910)
- + **05. Fees**

Note: “02. Transportation” can be selected as a “blanket” expense type for adding various transportation-related expenses (e.g., ride share, taxi, bus).

Home / Requests / Manage Requests / Houston Conference March 2026 / New Expense: 02. Transportation

New Expense: 02. Transportation Save Cancel

Required field *

Destination ✖ Business Travel Start Date * Business Travel End Date *

Estimated Amount * Currency * ✖

Comment 94/2000

Save Cancel

6. To edit an expense within your Request, select the expense item and click **Edit**.

TEST \$300.00 Submit Request Delete Request

Not Submitted | Request ID: 3CXM

[Request Details](#) [Attachments](#)

EXPECTED EXPENSES Add **Edit** Delete Allocate

<input checked="" type="checkbox"/>	Expense type↑	Details↑	Date↓	Amount↑	Requested↑
<input checked="" type="checkbox"/>	Train	Boston, Massachusetts - San Diego, California : Round Trip	03/28/2025	\$300.00	\$300.00
					\$300.00

← → **Train \$300.00** Save Request Assistant Delete Cancel

Round Trip One Way Multi City

Outbound * Required field

Departure Location * Arrival Location *

Departure Date * Departure Time Comment

Return

Departure Date * Departure Time Comment

Estimated Amount Currency

Use Request Assistant to estimate travel requests.

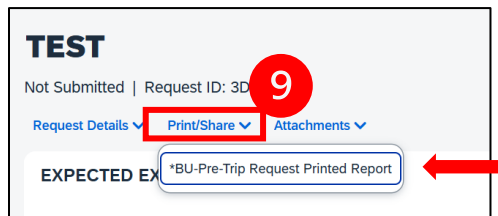
Save Request Assistant Cancel

BU Procure to Pay

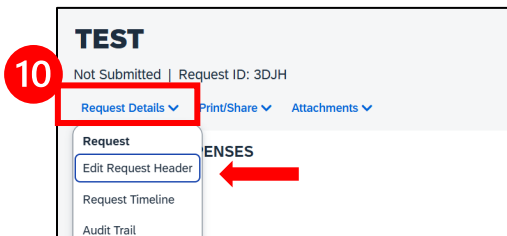
- After completing your expected expenses, attach documents for your approver's review. Click on the **Attachments** drop-down button and select **Attach Documents**.



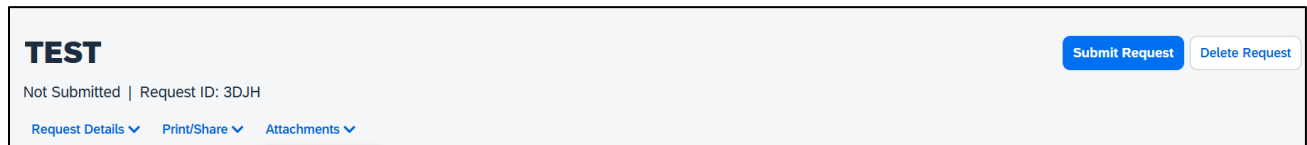
- To populate a Pre-Trip Request Report that can be emailed, saved as a PDF, or printed, select **Print/Share** and then **BU Pre-Trip Request Printed Report**.



- To edit the request header, view the request timeline, or see the audit trail, click **Request Details** and select an option from the drop-down list. The request timeline will show you an approval flow, giving you an idea of where the request will be directed once submitted.



- Once you have completed your expected expenses, select **Submit Request** to send it for your manager's approval. Once your request is approved, your request will change from a **Submitted** status to **Ready to Book**.



- Once your request is approved, you can create a Travel Expense Report. On your Expense page, click **Create New Report**; then, on your report header page, select **Create From an Approved Request**.

