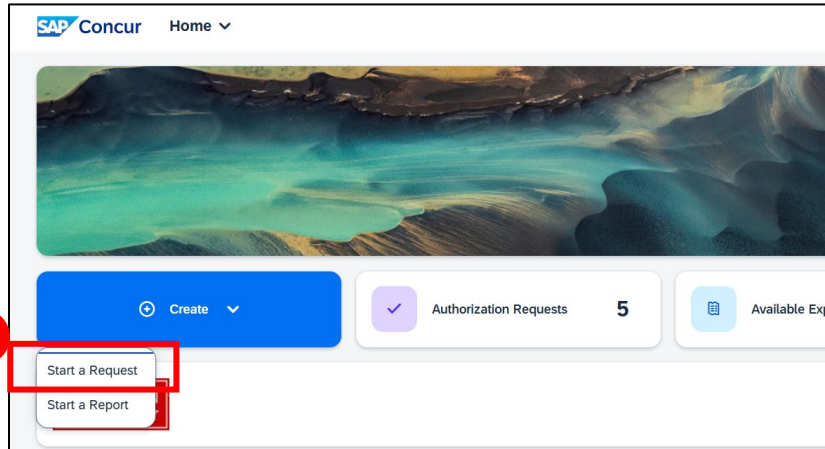
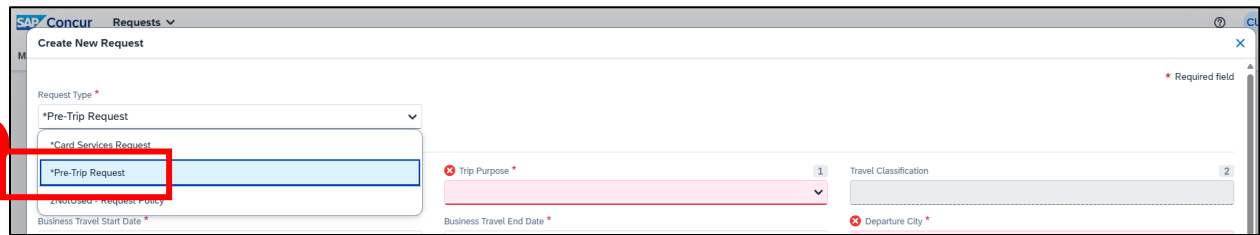


HOW TO CREATE A PRE-TRIP APPROVAL REQUEST

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



2. Select **Pre-Trip Request** from the Request Type drop-down in the Create New Request form.



3. Complete all required fields. Business Travel Start Date and End Date should align with the dates of travel.

Trip Information

Trip Name *
 Traveler Type *
 Departure City *

Business Travel Dates

Business Travel Start Date *
 Business Travel End Date *

Cost Object

Cost Object *
 Cost Object Approver Name *

Travel Classification

Travel Classification *

Other Fields

Main Destination City *
 Main Destination Country/Region *
 Will this trip include personal travel? *
 Will this trip be charged to a grant/sponsored program? *

Request Assistant

Request Assistant is On

Select the services to estimate:

☐ Flight
 ☐ Train
 ☐ Car Rental
 ☐ Hotel

Cancel [Generate Estimate](#)

- Select the services (e.g., flight, train, car rental, hotel) that apply for your trip. If you'd like to review a cost estimate before you create the request, click on **Generate Estimate**. Alternatively, turn off the Request Assistant AI tool (see screenshot below) and click **Create Request** after selecting the services.

Request Assistant on:

Request Assistant is On

Select the services to estimate: *

☐

✈️ Flight

☐

🚆 Train

☐

🚗 Car Rental

☐

🏨 Hotel

Cancel

⚡

Generate Estimate

Request Assistant off:

Request Assistant is Off

Cancel

Create Request

- If you used the Request Assistant AI tool, review the Request Estimate, make any adjustments to content generated by AI, and click **Create Request** to send your request for approval.

Request Assistant

✕

⚡ Request Estimate

\$300.00

"I need to travel from Boston, Massachusetts to San Diego, California from 03/28/2025 to 04/04/2025. I require Train."

Train

\$300.00

Boston, US - San Diego, US

Round Trip

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.

Hide Additional Criteria

Class

Any class

Connection

Any connection

⚡ Regenerate

Back

Cancel

Create Request



- Once your request is created in the Expected Expenses section, click **(+) Add** to include additional trip details (e.g., airfare, car rental) and estimated amounts for each expense in your initial request. Click **Save** to add additional expenses.

Manage Requests

Home / Requests / Manage Requests / TEST

TEST \$300.00

Not Submitted | Request ID: 3CXM

Request Details ▾ Attachments ▾

EXPECTED EXPENSES

☐ Expense type↑ Details↑

☐ Train Boston, Massachusetts - San Diego, California : Round Trip 03/28/2025 \$300.00 \$300.00

\$300.00

6 [Add](#) [Edit](#) [Delete](#) [Allocate](#)

You are currently logged in as a test user

SAP Concur Requests ▾

Manage Requests

Home / Requests / Manage Requests

TEST \$300.00

Not Submitted | Request ID: 3CXM

Request Details ▾ Attachments ▾

EXPECTED EXPENSES

☐ Expense type↑

☐ Train

Add expected expenses and/or travel plans

Search by expense type, category, description

01. Travel Expenses

- Accommodations

02. Transportation

- Airfare
- Car Rental
- Train

03. Meals

- Business Meals (513500, 513700)
- Entertainment (516050)
- Meeting Expense - Staff/Business Meetings (513910)
- Meetings (513910)

05. Fees

- Conference Registrations (513900)

06. Other

TEST \$300.00

Not Submitted | Request ID: 3CXM

Request Details ▾ Attachments ▾

Submit Request

Delete Request

EXPECTED EXPENSES

⊕ Add

Edit

Delete

Allocate

☒	Expense type↑↓	Details↑↓	Date📅	Amount↑↓	Requested↑↓
☒	Train	Boston, Massachusetts - San Diego, California : Round Trip	03/28/2025	\$300.00	\$300.00
				\$300.00	

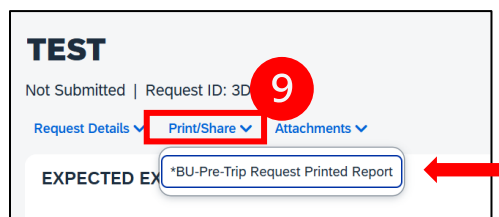
© Boston University

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



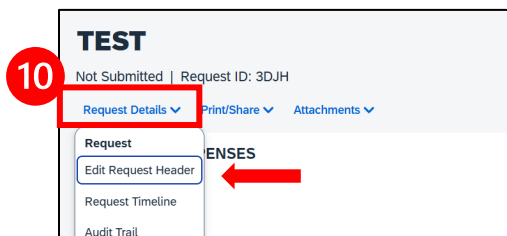
The screenshot shows the 'TEST' header with 'Not Submitted | Request ID: 3DJH'. Below the header are three dropdown menus: 'Request Details', 'Print/Share', and 'Attachments'. The 'Attachments' dropdown is open, showing an 'Attach Documents' button. A red circle with the number '8' is around the 'Attachments' dropdown, and a red arrow points to the 'Attach Documents' button. In the top right corner, there are 'Submit Request' and 'Delete Request' buttons. Below the dropdowns, there is an 'EXPECTED EXPENSES' section with an 'Add' button and 'Edit', 'Delete', and 'Allocate' links.

- 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**.



The screenshot shows the 'TEST' header with 'Not Submitted | Request ID: 3DJH'. Below the header are three dropdown menus: 'Request Details', 'Print/Share', and 'Attachments'. The 'Print/Share' dropdown is open, showing a '*BU-Pre-Trip Request Printed Report' option. A red circle with the number '9' is around the 'Print/Share' dropdown, and a red arrow points to the '*BU-Pre-Trip Request Printed Report' option. The 'EXPECTED EXPENSES' section is partially visible at the bottom.

- 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.



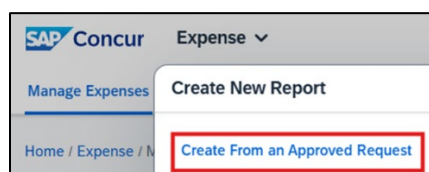
The screenshot shows the 'TEST' header with 'Not Submitted | Request ID: 3DJH'. Below the header are three dropdown menus: 'Request Details', 'Print/Share', and 'Attachments'. The 'Request Details' dropdown is open, showing options: 'Request', 'Edit Request Header', 'Request Timeline', and 'Audit Trail'. A red circle with the number '10' is around the 'Request Details' dropdown, and a red arrow points to the 'Edit Request Header' option. The 'EXPECTED EXPENSES' section is partially visible at the bottom.

- 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**.



The screenshot shows the 'TEST' header with 'Not Submitted | Request ID: 3DJH'. Below the header are three dropdown menus: 'Request Details', 'Print/Share', and 'Attachments'. In the top right corner, there are 'Submit Request' and 'Delete Request' buttons. The 'EXPECTED EXPENSES' section is partially visible at the bottom.

- 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**.



The screenshot shows the 'SAP Concur' logo and 'Expense' dropdown menu. Below the logo are 'Manage Expenses' and 'Home / Expense / New' links. The 'Create New Report' button is highlighted, and a dropdown menu is open showing the 'Create From an Approved Request' option. A red box highlights the 'Create From an Approved Request' option.