



Office of the President- 50 Washington Street, Suite 3000, Westborough, Massachusetts 01581

## Creating and Submitting a Prior Approval or Exception Request

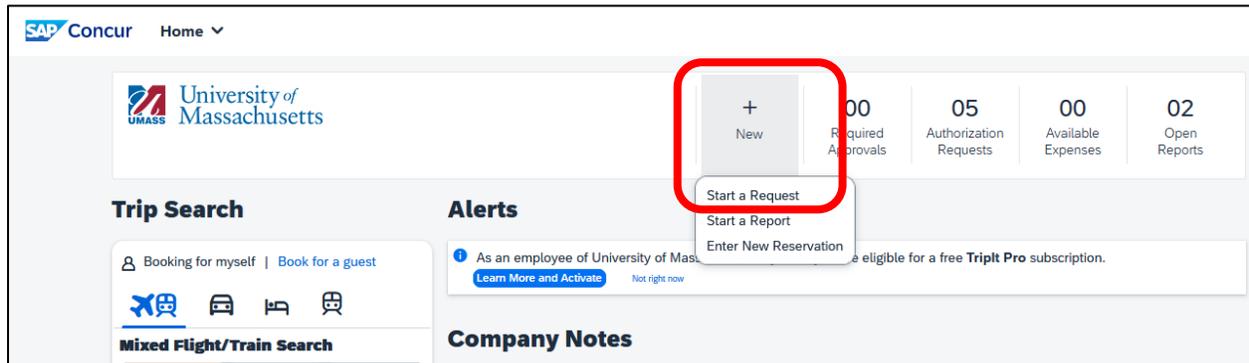
Concur Request is used to seek approval for expense items:

- Submitting for pre-travel authorization prior to your expensed trip expenses (domestic and international)
- Obtaining Prior-Approval for expenditures per the Business and travel Expense policy (BTE)
- Obtaining Exception approval for expenditures per the BTE.

Creating prior approval and exception approval within Concur follow the same steps.

1. From the SAP Concur home page, on the Quick Task bar at the top of the screen, select the **+ New** tab then **Start a Request**.

Note: depending on your Concur access, you may have a button that says **Start a Request**

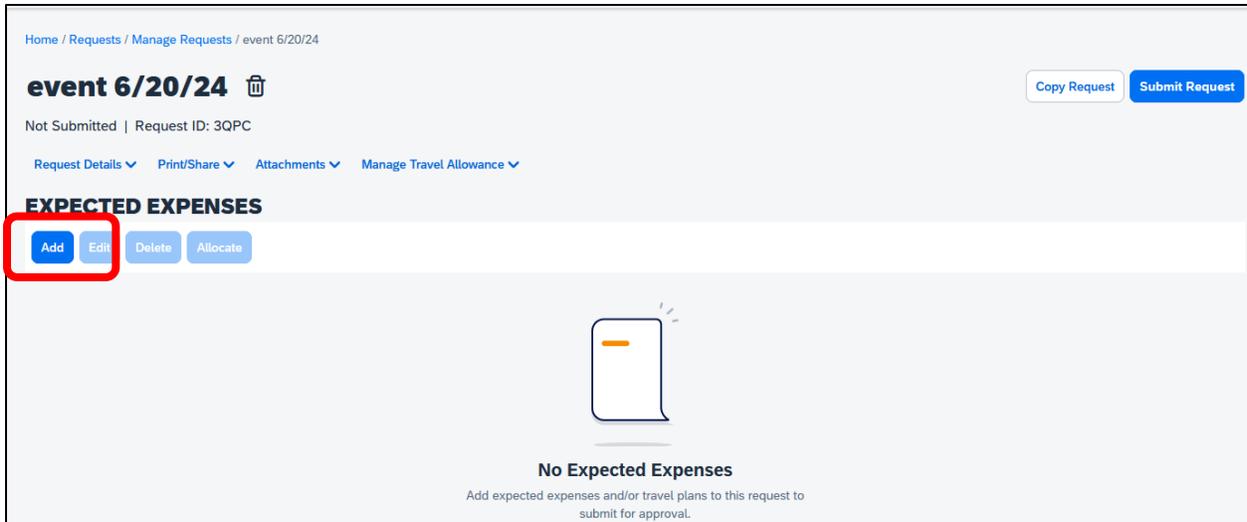


2. On the Create New Request page, select the Request Policy you are seeking:

- Expense Prior Approval
- Expense Exception

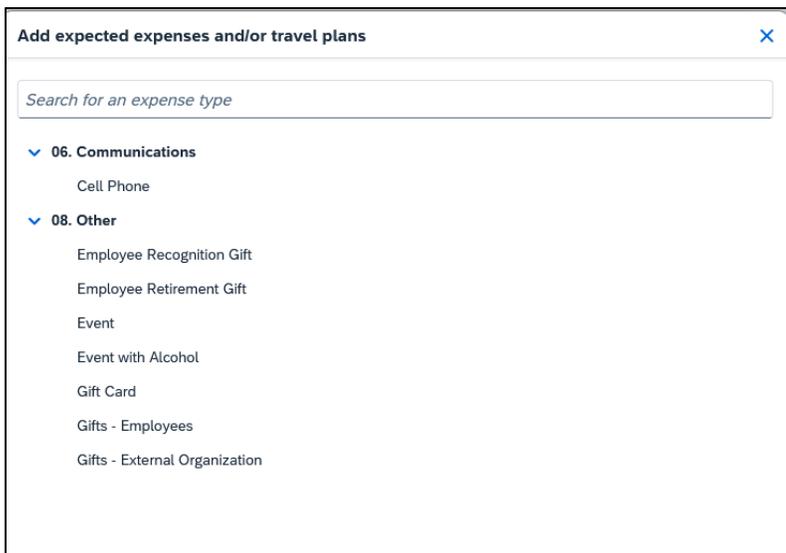
3. Based on this selection, the required and optional fields will populate. Complete the required fields (indicated with a red asterisk) and any optional fields:
  - **Request name** (required)
  - **business purpose** (required)
  - **request date** (required)
  - **Reason**- the reasons listed are associated with campus BTE policy as outlined on the additional approval matrix (required)
  - **campus** (required)
  - **Does your purchase relate to work on Sponsored Funds?** (required)

4. Select **Create Request**.
5. On the **Expected Expenses** page, select **Add** to enter the details and estimated amounts for each expense for which you are requesting prior approval or for exceptions enter the expenses that were already purchased.



- This is like how you would enter expenses in the Expense module. However, allocation is only on the entry page if required by your department or campus.
- You will be entering estimated expenses and will not require a receipt unless required by your campus for pre-purchased items.

6. Select **Add**, and then select the applicable expense type.



7. Complete the required and optional fields. Different fields appear based on the type of expense selected. The following fields are always required:

- Date
- Description
- Transaction Amount (can be estimated if obtaining prior approval)

Home / Requests / Manage Requests / event 6/20/24 / New Expense: Event

## New Expense: Event \$578.00

Allocate

Transaction Date \* 06/14/2024

Description 0/64

Transaction Amount \* 578.00

Currency \* US, Dollar (USD)

Comment 0/2000

Cancel Save

\* Required field

Save Cancel

8. Include any additional details for your approvers in the comments field.
9. **Save** the expected expense.
10. Continue to add additional expected expenses by repeating from step 5 as needed.
11. To add attachments to your request, if applicable, select the **Attachments** dropdown.

Home / Requests / Manage Requests / event 6/20/24

## event 6/20/24 \$578.00

Not Submitted | Request ID: 3QPC

Request Details Print/Share Attachments Manage Travel Allowance

Copy Request Submit Request

### EXPECTED EXPENSES

Add Edit Delete Allocate

<input type="checkbox"/>	Expense type↑↓	Details↑↓	Date↓↑	Amount↓↑	Requested↓↑
<input type="checkbox"/>	Event		06/14/2024	\$578.00	\$578.00
					\$578.00

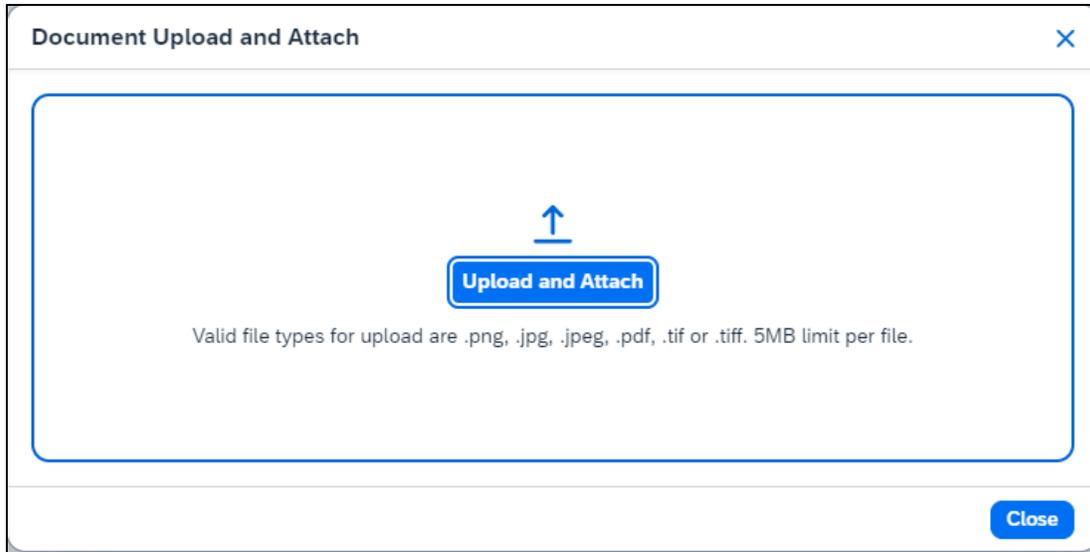
12. Then select **Attach documents**

Request Details Print/Share Attachments Manage Travel Allowance

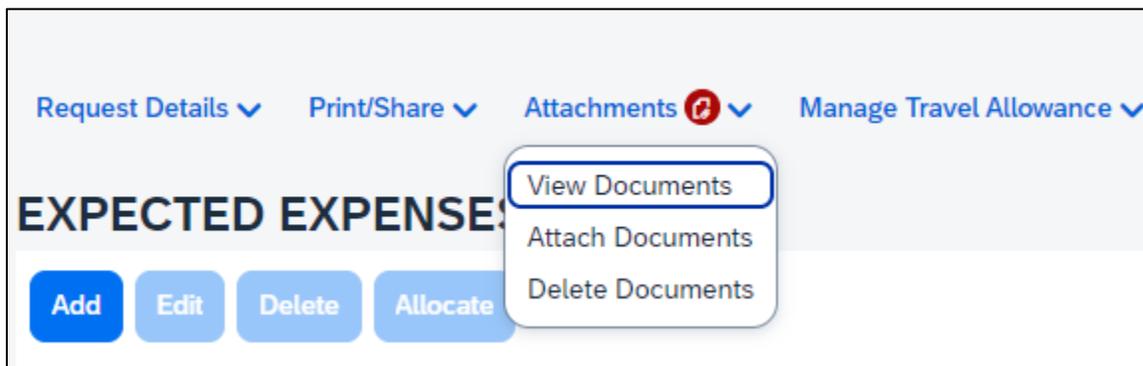
Attach Documents

### EXPECTED EXPENSES

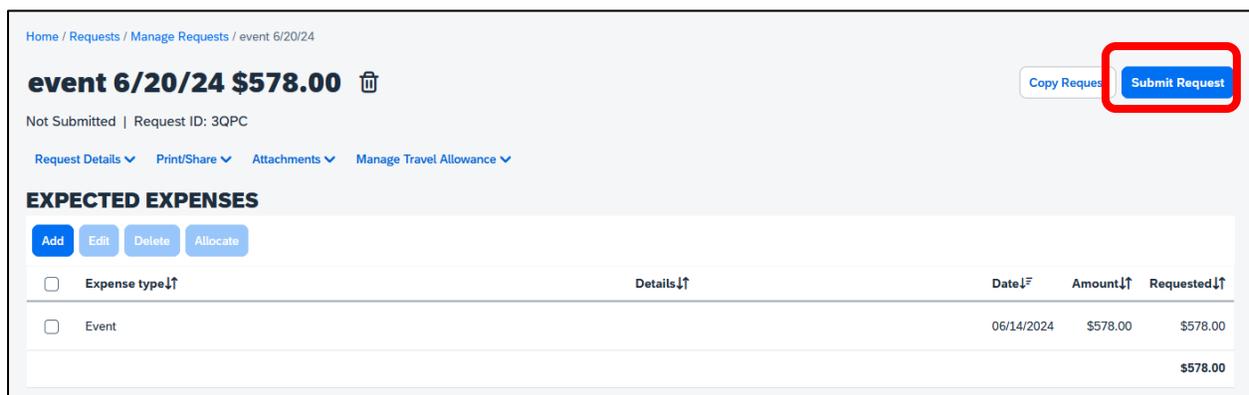
13. Follow prompts to upload and attach your document



14. If you need to change your Attachments, you may select
- View documents** to see what is attached
  - Attach documents** to attached additional documents
  - Delete documents** remove any unwanted documents.



15. After everything has been entered, select **Submit Request**



If at any point before submitting, you need to make edits to your original entry, you may select **Request Details** then **Edit Request Header**.

- Note you are not able to edit all fields in the Request Header.

