

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**

SAP Concur	r Home 🗸						
	University of Massachusetts		+ New	00 R quired Approvals	05 Authorization Requests	00 Available Expenses	02 Open Reports
Trip Search		Alerts Start a Request Start a Report					
ε	Booking for myself Book for a guest	As an employee of University of Mas Enter New Reservation e eligible for a free Tripit Pro subscription. Learn More and Activate Not right now					
N	lixed Flight/Train Search	Company Notes					

- 2. On the Create New Request page, select the Request Policy you are seeking:
- Expense Prior Approval
- Expense Exception

Create New Request					×
					* Required field
Request Policy *	Request Na	ime *		Start Date *	
Personal Int'l Travel: Authorize UMass De \checkmark				MM/DD/YYYY	Ë
Expense Exception		ation *		Main Destination City *	
Expense Prior Approval		lected	~		~
Personal Int'l Travel: Authorize UMass Device/Access	UMass data	3		Destination 4	
Pre-Travel Domestic					
Pre-Travel International		stent Identifier			
Comment					0/500
					//

- 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)

Create New Request						×
						* Required field
Request Policy *		Request Name *		Business Purpose		
Expense Prior Approval	~			None Selected		~
Request Date *		Reason *		Does your purchase relate to work on Sponsored Funds? *		
MM/DD/YYYY	9	None Selected	~	None Selected		~
Campus *		Lowell Provost Special Funding				
Amherst	~	None Selected	~			
Comment	_		_			0/500
						lh.
					Cancel	Create Request

- 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.



Home / Requests / Manage Requests / event 6/20/24	
event 6/20/24 🛍	Copy Request Submit Reques
Not Submitted Request ID: 3QPC	
Request Details 🗸 Print/Share 🗸 Attachments 🗸 Manage Travel Allowance 🗸	
EXPECTED EXPENSES	
Add Edit Delete Allocate	
No Expected Expenses	
Add expected expenses and/or travel plans to this request to submit for approval.	

- 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.

Add expected expenses and/or travel plans	×					
	_					
Search for an expense type						
✓ 06. Communications						
Cell Phone						
✓ 08. Other						
Employee Recognition Gift						
Employee Retirement Gift						
Event						
Event with Alcohol						
Gift Card						
Gifts - Employees						
Gifts - External Organization						

- 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:Eve	Cancel Save							
() Allocate								
				* Required field				
Transaction Date *		Description	0/64					
06/14/2024	Ë							
Transaction Amount *		Currency *						
578.00		US, Dollar (USD)	× ~					
Comment				0/2000				
				1.				
Save Cance								

- 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		Copy Request Submit Request						
Not Submitted Request ID: 3QPC								
Request Details 🗸 Print/Share 🗸 Attachments 🗸 Manage Travel Allowance	e 🗸							
EXPECTED EXPENSES								
Add Edit Delete Allocate								
☐ Expense type↓↑	Details↓↑	Date↓ [╤] Amount↓↑ Requested↓↑						
Event		06/14/2024 \$578.00 \$578.00						
		\$578.00						

12. Then select Attach documents

Request Details 🗸	Print/Share 🗸	Attachments 🗸	Manage Travel Allowance 🗸
EXPECTED	EXPENSE	Attach Documen	ts

13. Follow prompts to upload and attach your document





14. If you need to change your Attachments, you may select

- a. View documents to see what is attached
- b. Attach documents to attached additional documents
- c. Delete documents remove any unwanted documents.

Reques	t Details	🗸 Prir	nt/Share 🗸	Attachments 🕗 🗸	Manage Travel Allowance 🗸
EXPE	СТЕ	D EX	PENSE	View Documents Attach Documents	
Add	Edit	Delete	Allocate	Delete Documents	

15. After everything has been entered, select Submit Request

Home / Requests / Manage Requests / event 6/20/24				_	
event 6/20/24 \$578.00	创			Copy Reques	Submit Request
Not Submitted Request ID: 3QPC				_	
Request Details V Print/Share V Attachments V	Manage Travel Allowance 🗸				
EXPECTED EXPENSES					
Add Edit Delete Allocate					
☐ Expense type↓↑		Details↓↑	Date	↓ 『 Amount↓↑	Requested ↓ ↑
Event			06/1-	4/2024 \$578.00	\$578.00
					\$578.00



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.



