

## Concur Travel Request and Expense Report Job Aid for Virtual Conferences

**IMPORTANT TIP:** Prior to creating and submitting your Concur Request for a virtual conference, it is advisable to complete the following tasks:

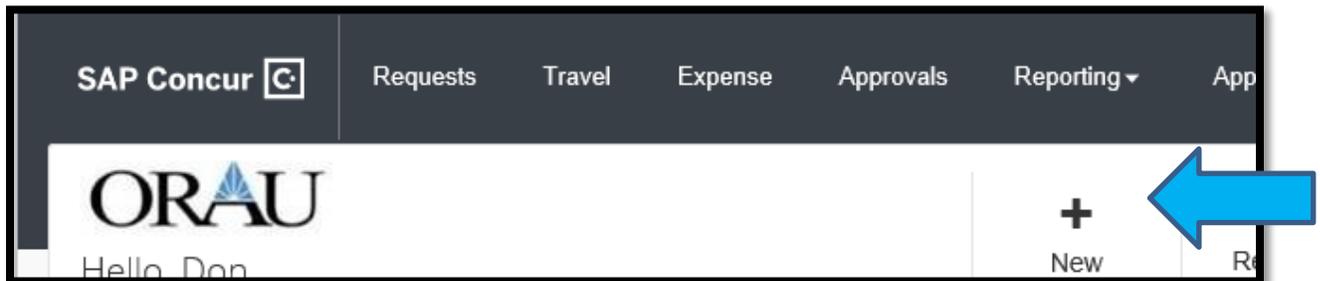
- Discuss your travel plans with your travel approver(s) so they will expect the Travel Request notification.

**NOTE:**

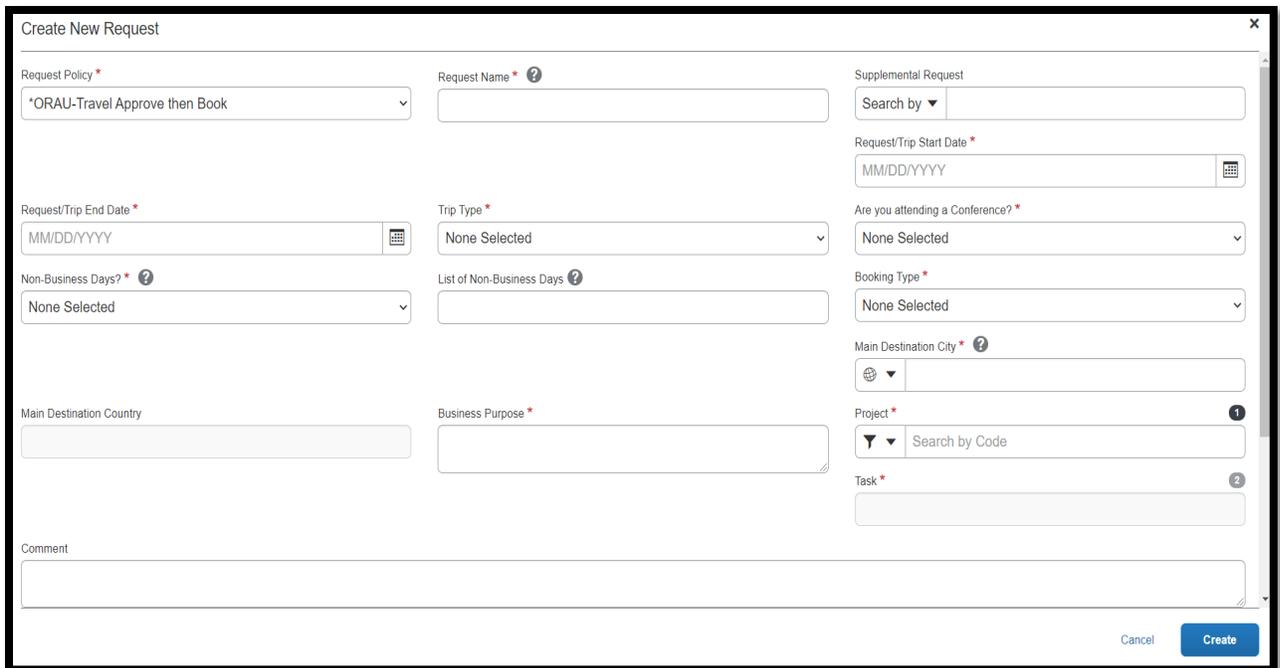
- A **red asterisk \*** indicate a required field.
- Grey question marks “?” are **Tool Tips** to assist you. To see the Tool Tips, hover your cursor over the “?”.

### Create New Travel Request

- 1) Click on **Request Travel** in Zintellect, to get to the **Concur Home** page.
- 2) To create a new **Travel Request**, click on **New**:



- 3) Click on **Start a Request** to open the **Create New Request** form:

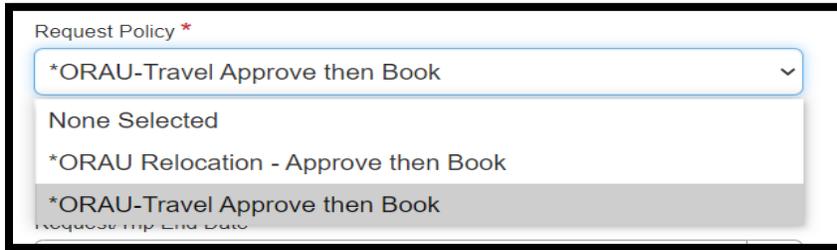
A screenshot of the 'Create New Request' form in SAP Concur. The form is titled 'Create New Request' and has a close button (X) in the top right corner. It contains several fields and dropdown menus:

- Request Policy \***: A dropdown menu with the selected option '\*ORAU-Travel Approve then Book'.
- Request Name \***: A text input field with a grey question mark icon.
- Supplemental Request**: A section with a 'Search by' dropdown and an empty text input field.
- Request/Trip Start Date \***: A date input field with a calendar icon, showing 'MM/DD/YYYY'.
- Request/Trip End Date \***: A date input field with a calendar icon, showing 'MM/DD/YYYY'.
- Trip Type \***: A dropdown menu with 'None Selected'.
- Are you attending a Conference? \***: A dropdown menu with 'None Selected'.
- Non-Business Days? \***: A dropdown menu with 'None Selected'.
- List of Non-Business Days**: A text input field with a grey question mark icon.
- Booking Type \***: A dropdown menu with 'None Selected'.
- Main Destination City \***: A text input field with a globe icon and a grey question mark icon.
- Main Destination Country**: A text input field.
- Business Purpose \***: A text input field.
- Project \***: A dropdown menu with 'Search by Code' and a grey question mark icon.
- Task \***: A text input field with a grey question mark icon.
- Comment**: A large text input field at the bottom.

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

4) This **Create New Request** form includes basic trip information. Complete all sections as follows:

**a. Request Policy** – Select **ORAU-Travel Approve then Book**

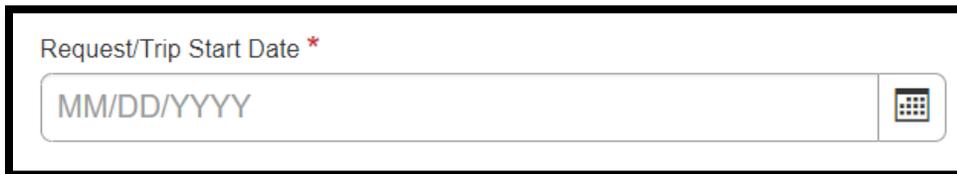


A screenshot of a dropdown menu titled "Request Policy \*". The selected option is "\*ORAU-Travel Approve then Book". Other visible options include "None Selected", "\*ORAU Relocation - Approve then Book", and "\*ORAU-Travel Approve then Book".

**Note:** The selection of any other policy type for virtual conferences will result in the need to resubmit this request.

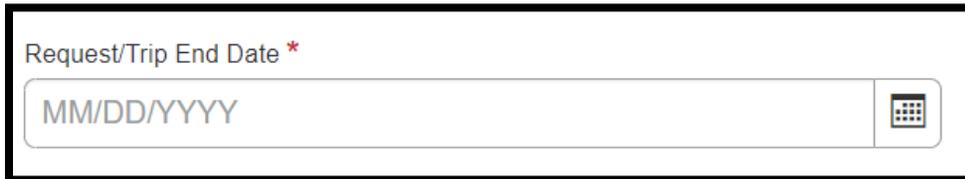
**b. Request Name** – Enter the title of the virtual conference and the event dates.

**c. Request Trip Start Date** – Enter the date the virtual conference will begin or click on the calendar and select the **Trip Start Date**:



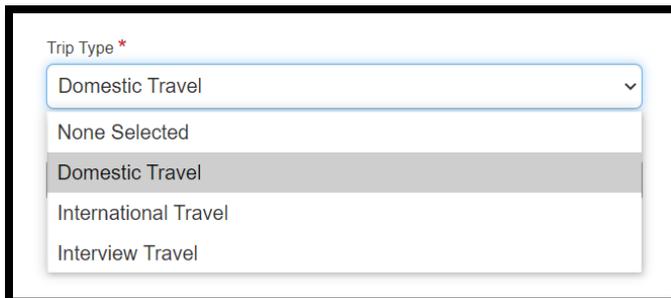
A screenshot of an input field titled "Request/Trip Start Date \*". The field contains the placeholder text "MM/DD/YYYY" and a calendar icon on the right side.

**d. Request Trip End Date** – Enter the date the virtual conference will end or click on the calendar and select the **Trip End Date**:



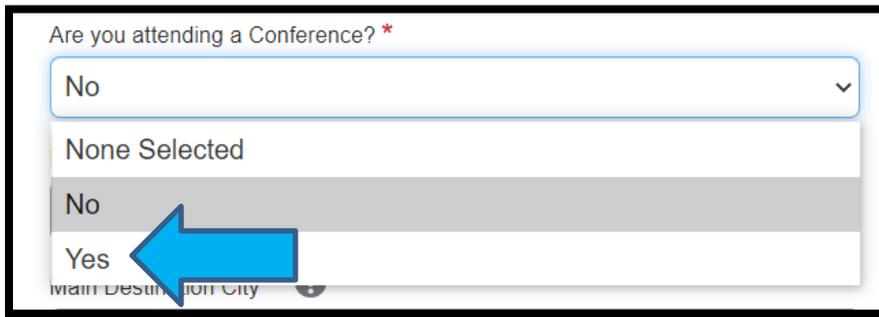
A screenshot of an input field titled "Request/Trip End Date \*". The field contains the placeholder text "MM/DD/YYYY" and a calendar icon on the right side.

**e. Trip Type** – If the conference you are attending virtually has a physical location, select the location of the virtual conference – I.e. if located in the United States select **Domestic Travel**, if outside the United States, select **International Travel**:



A screenshot of a dropdown menu titled "Trip Type \*". The selected option is "Domestic Travel". Other visible options include "None Selected", "Domestic Travel", "International Travel", and "Interview Travel".

**f. Are you attending a Conference? – Select **Yes**:**



Are you attending a Conference? \*

No

None Selected

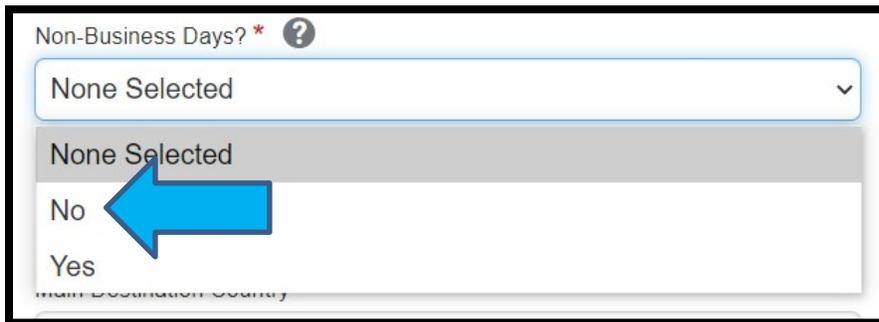
No

Yes

Main Destination, Home City

A blue arrow points to the 'Yes' option in the dropdown menu.

**g. Non-Business Days – Select **No** to indicate no personal travel:**



Non-Business Days? \* ?

None Selected

None Selected

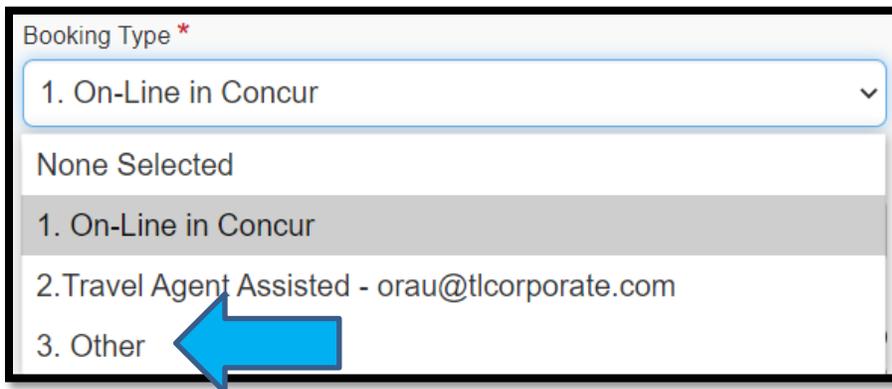
No

Yes

Main Destination, Country

A blue arrow points to the 'No' option in the dropdown menu.

**h. Booking Type – Select **Other** for Booking Type:**



Booking Type \*

1. On-Line in Concur

None Selected

1. On-Line in Concur

2. Travel Agent Assisted - orau@tlcorporate.com

3. Other

A blue arrow points to the '3. Other' option in the dropdown menu.

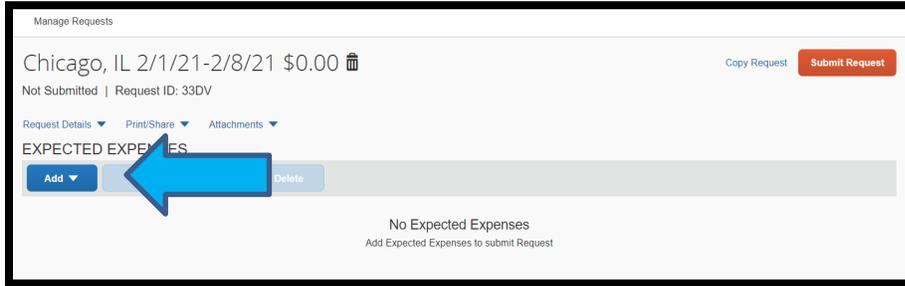
- i. Business Purpose –** Enter detailed **Business Purpose** of the conference.
- j. Main Destination City –** Enter your home city as the main city of lodging.
- k. Project –** Project Code will be pre-filled
- l. Task –** Task Code will be pre-filled

**5) Comments –** Enter any information your approvers should be aware for the request, such as your attendance to the conference is virtual only.

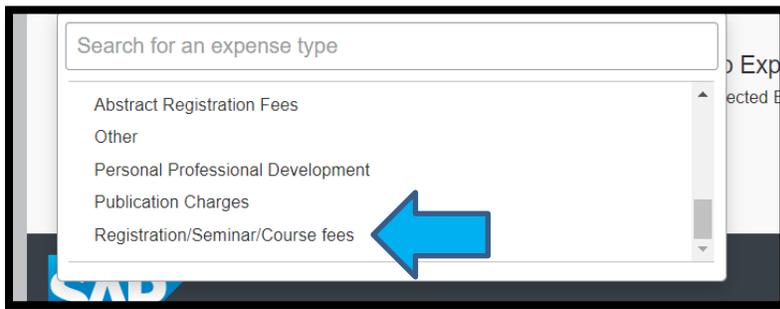
**6) Click the **Create** button.**

## Expected Travel Expenses

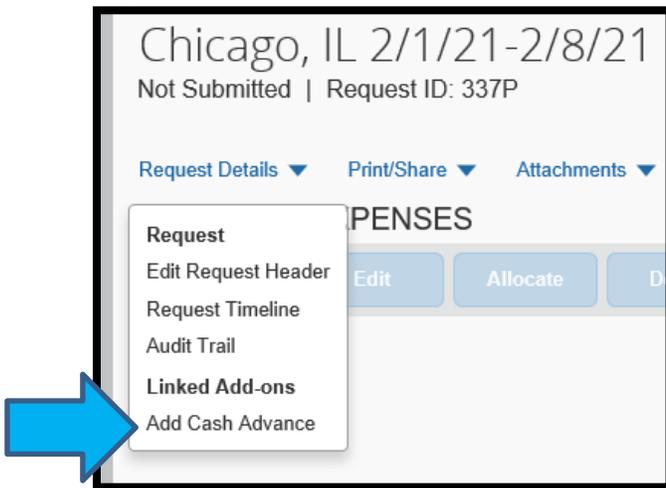
- 6) **Expected Travel Expenses:** Complete the **Expected Expenses** form as follows:
- a. **Add:** Click the **Add** button to begin entering expected expenses for your conference.



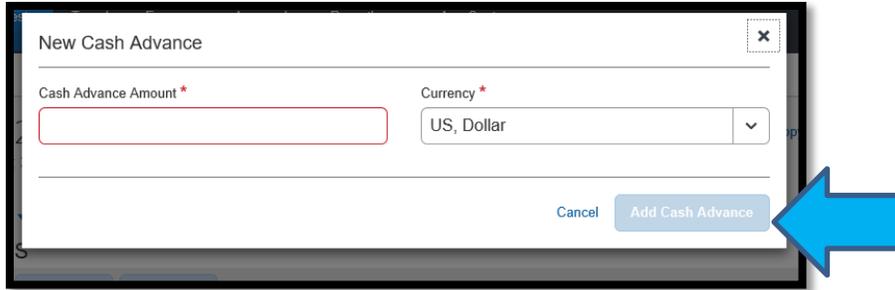
- b. **Other -** Select the **Registration/Seminar/Course Fee** category to enter the conference registration cost information and click **Save**.



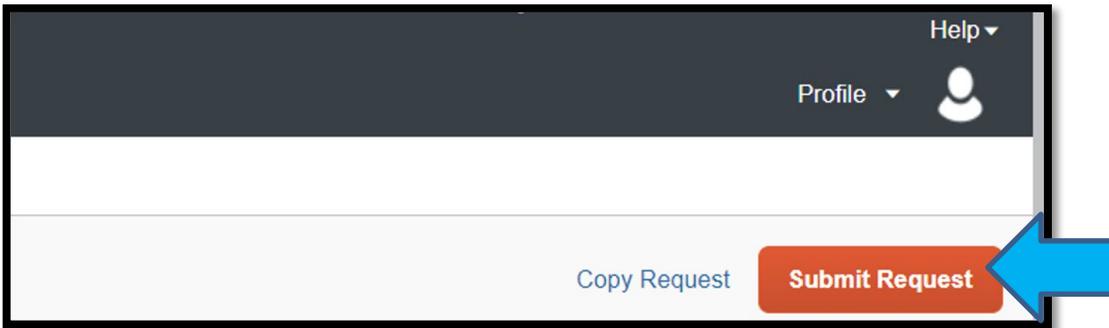
- 7) **Cash Advance -** To request a cash advance for your conference registration fees, click on the **Request Details** button and then **Add Cash Advance**.



Fill in the conference registration amount and then click the **Add Cash Advance** button.



- 8) After entering all **Expected Travel Expenses** on the **Expected Expense** form, click the **Submit Request** button located at the top right corner.



**Note:** Once the **Travel Request** is submitted, it routes to the program for cost approval, and then to ORISE Travel Services for additional conference approval. Upon approval, you will receive an email notification that the conference has been approved and the cash advance will be processed.

**IMPORTANT:** Once approved, you will need to register for the conference and pay the registration fee using your personal credit card. *ORISE does not register participants for conferences or pay registration fees directly to the conference host.*

## Concur Expense Report for Virtual Conference Job Aid for Participants/Fellows

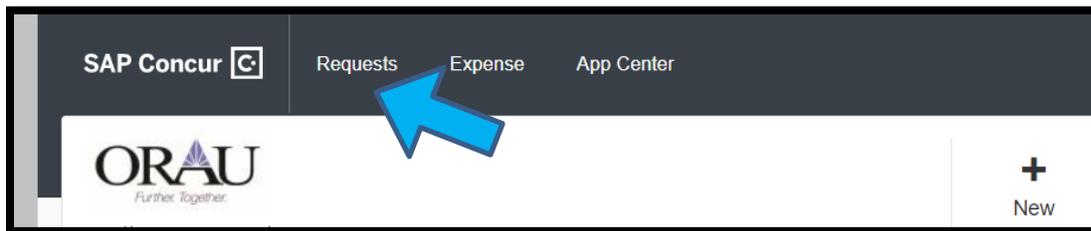
Once your virtual conference is complete, you will need to log into **Concur** or via your single sign on in Zintellect to get to the **Concur Home** page.

### NOTE:

- A **red asterisk \*** indicate a required field.
- Grey question marks “?” are **Tool Tips** to assist you. To see the Tool Tips, hover your cursor over the “?”.

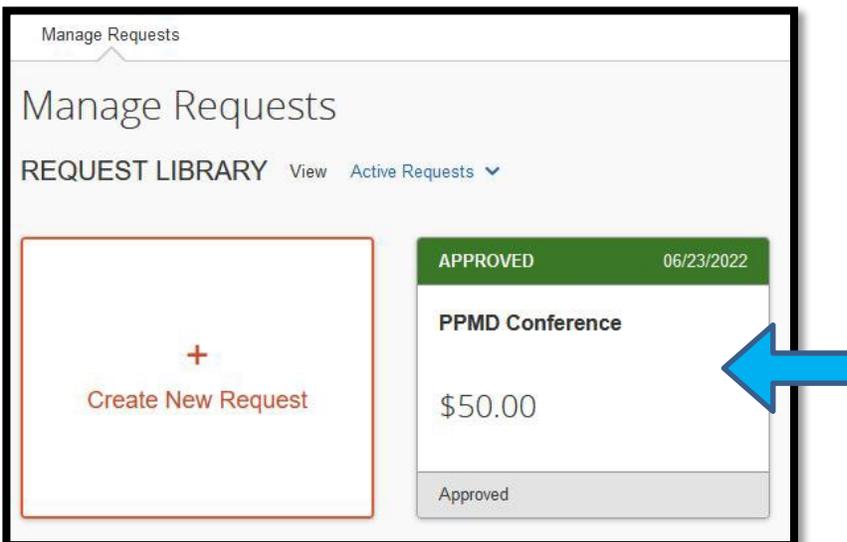
## Create New Expense Report

1) To create a new **Expense Report**, click on **Requests** in the header:



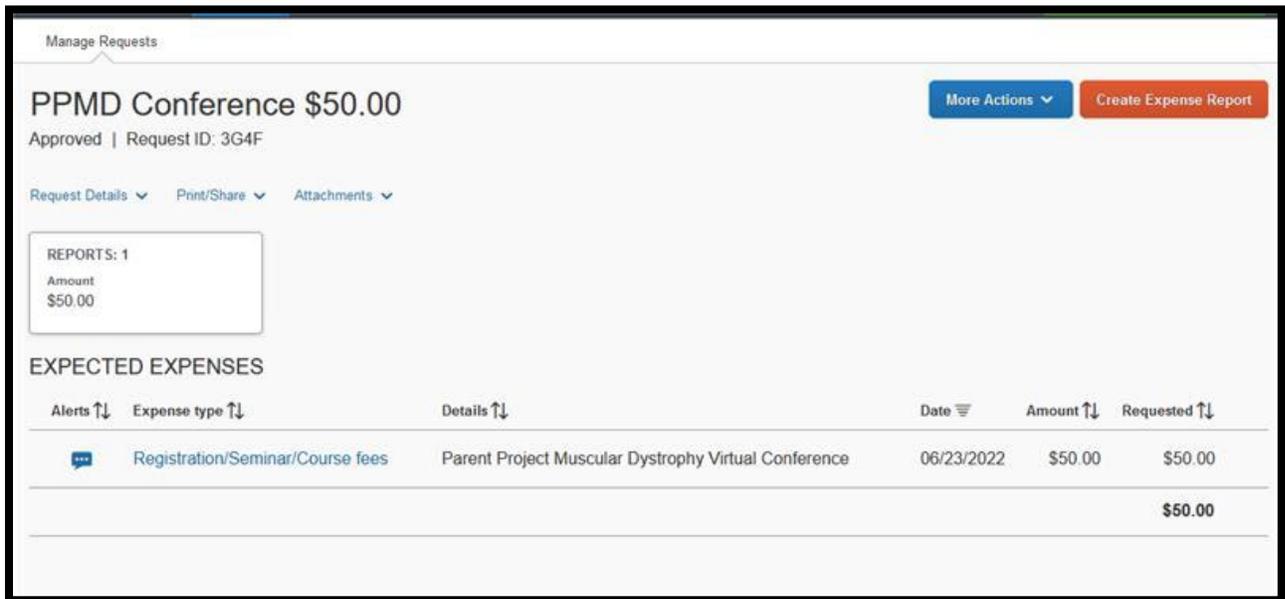
This will display your **Manage Requests** screen to view **Active Requests** in the system:

2) Click to open the **Request** for which you will be creating an **Expense Report**:



The following page will display the information that was entered into the **Travel Request**.

- 3) To start creating an **Expense Report**, click the **Create Expense Report** button in the top right corner. **Note:** the \$50 Cash Advance shown on this example request is the amount that will be deducted from the **Expense Report**.



The screenshot shows the 'Manage Requests' interface for a request titled 'PPMD Conference \$50.00'. The status is 'Approved' with Request ID '3G4F'. A 'Create Expense Report' button is visible in the top right. Below the title, there are tabs for 'Request Details', 'Print/Share', and 'Attachments'. A summary box shows 'REPORTS: 1' with an 'Amount' of '\$50.00'. The 'EXPECTED EXPENSES' section contains a table with one entry: 'Registration/Seminar/Course fees' for 'Parent Project Muscular Dystrophy Virtual Conference' on '06/23/2022' for '\$50.00'.

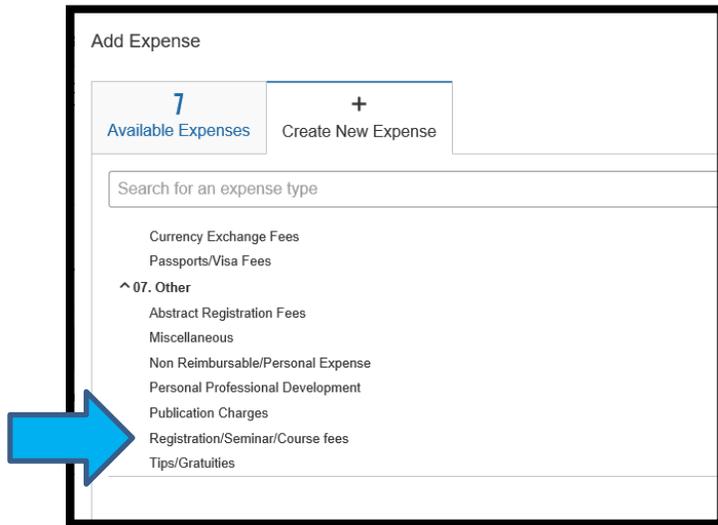
| Alerts | Expense type                     | Details  | Date       | Amount  | Requested |
|--------|----------------------------------|--|------------|---------|-----------|
|        | Registration/Seminar/Course fees | Parent Project Muscular Dystrophy Virtual Conference | 06/23/2022 | \$50.00 | \$50.00   |
|        |                                  |  |            |         | \$50.00   |

- 4) Clicking **Create Expense Report** will display this page. Click on **Add Expense**:



The screenshot shows the 'Manage Expenses' interface for a report titled 'PPMD Conference \$0.00'. The status is 'Not Submitted'. A 'Submit Report' button is in the top right. Below the title, there are tabs for 'Report Details', 'Print/Share', 'Manage Receipts', and 'Travel Allowance'. A summary box shows 'REQUEST' with 'Approved' amount of '\$50.00' and 'Remaining' amount of '\$0.00'. Below this is a row of buttons: 'Add Expense', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. A 'No Expenses' message is displayed at the bottom, stating 'Add expenses to this report to submit for reimbursement.' Two blue arrows point to the 'Add Expense' button and the 'Remaining \$0.00' value.

5) Select **Registration/Seminar/Course** type of expense from pick list.



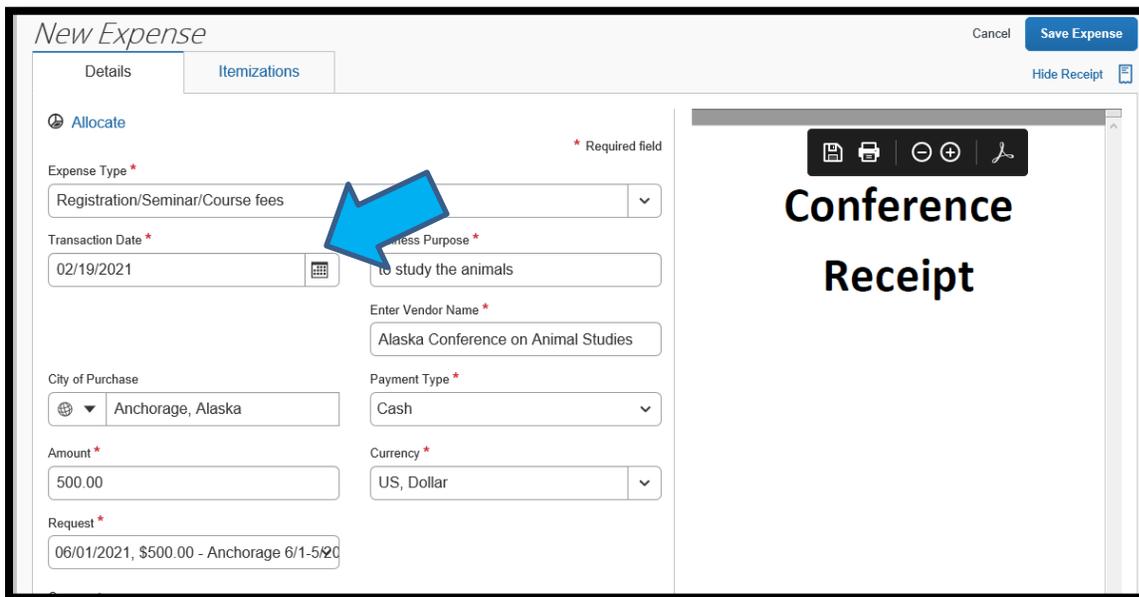
Add Expense

7 Available Expenses | + Create New Expense

Search for an expense type

- Currency Exchange Fees
- Passports/Visa Fees
- ^ 07. Other
  - Abstract Registration Fees
  - Miscellaneous
  - Non Reimbursable/Personal Expense
  - Personal Professional Development
  - Publication Charges
  - Registration/Seminar/Course fees
  - Tips/Gratuities

6) Enter information in required fields. **Transaction Date** is the date of payment.



New Expense

Cancel Save Expense

Details Itemizations Hide Receipt

Allocate

Expense Type \* Registration/Seminar/Course fees

Transaction Date \* 02/19/2021

Business Purpose \* to study the animals

Enter Vendor Name \* Alaska Conference on Animal Studies

City of Purchase Anchorage, Alaska

Payment Type \* Cash

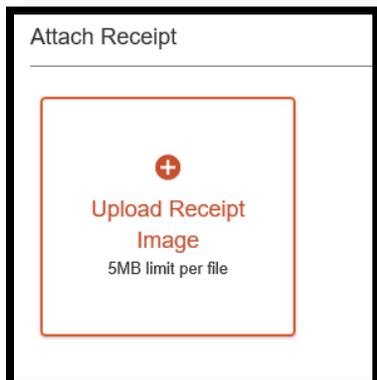
Amount \* 500.00

Currency \* US, Dollar

Request \* 06/01/2021, \$500.00 - Anchorage 6/1-5/20

Conference Receipt

7) Attach your paid receipt.

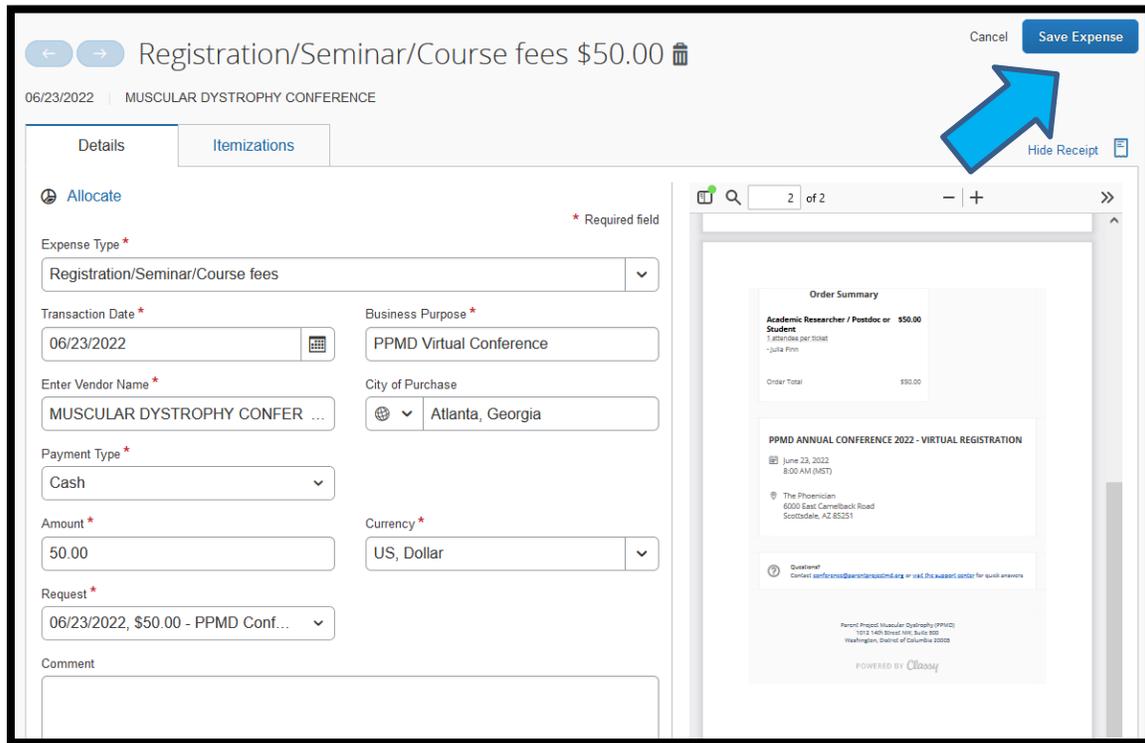


Attach Receipt

Upload Receipt Image

5MB limit per file

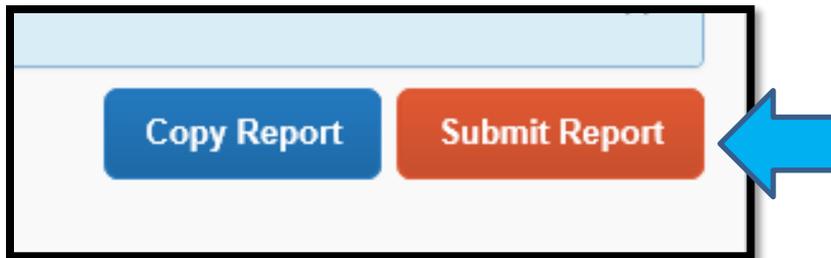
**8) Click Save Expense:**



The screenshot shows a web form for creating an expense report. The title is "Registration/Seminar/Course fees \$50.00". The date is "06/23/2022" and the event is "MUSCULAR DYSTROPHY CONFERENCE". The form has two tabs: "Details" (selected) and "Itemizations". Under "Details", there are several required fields: "Expense Type" (Registration/Seminar/Course fees), "Transaction Date" (06/23/2022), "Business Purpose" (PPMD Virtual Conference), "Enter Vendor Name" (MUSCULAR DYSTROPHY CONFER ...), "City of Purchase" (Atlanta, Georgia), "Payment Type" (Cash), "Amount" (50.00), and "Request" (06/23/2022, \$50.00 - PPMD Conf...). A "Comment" field is also present. On the right side, there is a "Hide Receipt" link and a "Save Expense" button, which is highlighted with a blue arrow. A "Cancel" button is also visible. An "Order Summary" window is open on the right, showing details for the "PPMD ANNUAL CONFERENCE 2022 - VIRTUAL REGISTRATION" on June 23, 2022, at The Phoenician hotel in Scottsdale, AZ. The order total is \$50.00. The receipt is powered by Classy.

**9) After adding all Expenses, a page will display with all expenses listed. Note: The Cash Advance will automatically be deducted.**

**10) Click Submit Report in the top right hand corner to complete the Expense Report.**



**11) Next you will see a Pop-up window for you to verify the accuracy of the information you have entered into the Expense Report. If agreed, click the Accept and Continue.**

**12) Once approved by the cost approver, you will receive notification that the Expense Report has been approved and submitted to Accounts Payable for processing.**