IMPORTANT TIPS:

- Before beginning the Travel Request, make sure your Concur Profile is up to date. Click on Profile and then Profile Setting:

![Profile Setting](image)

- **You must enter your personal credit card information to make hotel reservations through Concur or if the travel agency is making your hotel reservations.** Lodging and Car Rental must be paid for at the time of travel. You will need to have receipts for lodging and rental car to upload to your Expense Report when travel is complete. Be advised that hotel and car rentals require a credit card when you check in.

Prior to creating and submitting your Concur Travel Request, 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.
- Using the Concur Booking Tool, gather estimated costs for expense items such as airfare, lodging, car rental or other transportation, conference fees, mileage, and airline baggage fees.
- M&IE (Meals and Incidental Expenses) is based on the location of lodging and is calculated in the Travel Request pursuant to GSA rates (website [https://www.gsa.gov/travel/plan-book/per-diem-rates](https://www.gsa.gov/travel/plan-book/per-diem-rates)) Note: The M&IE allowance for first and last day of travel is 75% of the daily rate.
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:

4) This Create New Request form includes basic trip information. Complete all sections as follows:
a. **Request Policy** – Select ORAU-Travel Approve then Book

![Request Policy](image)

b. **Request Name** – Enter the City, State, and Travel Dates as shown in the Example:

![Request Name](image)

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

![Request Trip Start Date](image)

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

![Request Trip End Date](image)
e. **Trip Type** – Select Domestic Travel, International Travel or Interview Travel:

f. **Are you attending a Conference?** – Select Yes or No:

g. **Non-Business Days (personal travel)** – Select Yes or No to indicate personal travel:

**Note:** If you are including non-business days (personal travel) in your trip, you will need to book travel using the “Direct with Agency” booking option below so that the agency can provide a cost comparison for non-business/personal travel expenses in your Travel Request. It is your responsibility to ensure your travel itinerary contains a cost comparison provided by the Agency.
h. **List of Non-Business Days** – Enter the actual dates of personal travel:

```
List of Non-Business Days
April 25-27
```

i. **Booking Type** – Select how you will book your travel:

1. **On-Line in Concur**: (recommended option for all domestic bookings unless personal travel is included) Once your Travel Request is approved, click on the Request labeled “Ready to Book” and then the “Book Travel” button to Self-Book your travel:

2. **Direct with Agency**: ORAU’s Travel Agency (TLC) provides a tentative itinerary and booking services once **Travel Request** is fully approved. **Note**: If you are including non-business days (personal travel) in your trip, you will need to select this option.
3. **Other**: No booking assistance required. Select this option if you are booking your own airfare (not using On-Line in Concur or Travel Agency), or if there is no airfare required for the trip. **Note**: You must ensure your program allows this option.

j. **Business Purpose** – Enter detailed **Business Purpose** of the trip

k. **Main Destination City** – Enter the main city of lodging

l. **Project** – Project Code will be pre-filled. (If this field is blank, please contact your ORISE Point of Contact before proceeding.)

m. **Task** – Task Code will be pre-filled. (If this field is blank, please contact your ORISE Point of Contact before proceeding.)

n. **Comments** – Enter any information your approvers should be aware for travel.

5) **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 trip.
b. **New Expense: Hotel Reservation** – Enter the required information and click **Save**.

c. **New Expense: Meals – per diem** – Click **Save**. Concur automatically calculates the M&IE per diem amount based on the location and dates entered on the **Travel Request**.
d. **New Expense: Air Ticket** – Enter the required information and click **Save**.

![Air Ticket Form](image)

- **From**: Harrisfield Int'l (Airport - ATL), Atlanta, Georgia
- **To**: O'Hare Int'l (Airport - ORD), Chicago, Illinois
- **Date**: 09/25/2022
- **Amount**: $475.00
- **Currency**: US Dollar

![Comment Section](annotation)

- **Comment**: List details of your flight time or list preferred flight numbers, if you know them.

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e. **New Expense: Airline Fees** – Enter the required information and click **Save**.

![Airline Fees Form](image)

- **Date**: 10/07/2022
- **Amount**: $0.00
- **Currency**: US Dollar

![Comment Section](annotation)

- **Comment**: If you need a cost comparison for personal travel, be sure to ask for that here. It is your responsibility to make sure the cost comparison is included on the flight itinerary from our travel agents.
f. **New Expense: Car Rental** – Enter the required information and click **Save**.

![New Expense: Car Rental](image)


g. **New Expense: Parking** – Enter the required information and click **Save**.

![New Expense: Parking](image)


h. **New Expense: Mileage** – Enter the **Number of Miles** expected for your personally owned vehicle (e.g., miles to and from airport; or miles to and from city of destination if driving is the main mode of transportation) and click **Save**.

![New Expense: Mileage](image)
i. **Other** - Select the applicable category to enter the required information and click **Save**. **Note**: Check with your program to ensure coverage of expense, as some of these categories may not be reimbursable travel expenses for some programs.

7) **Cash Advance** - To request a cash advance for your trip, click on the **Request Details** button and then **Add Cash Advance**.
Fill in the amount needed for per diem and then click the **Add Cash Advance** button.

![Add Cash Advance](image)

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

![Submit Request](image)

**Note:** Once your **Travel Request** has been approved, you will receive an email notification that your trip is ready to book and the **Travel Request** will appear as **READY TO BOOK** on the Concur home page:

![Ready to Book](image)

9) **Booking Travel** - To book your travel see the **Job Aid – Concur Booking Tool**.

**Note:** If **Travel Agent Assisted** was selected in your **Travel Request**, the Travel Agency will contact you to complete the booking and travel arrangements.