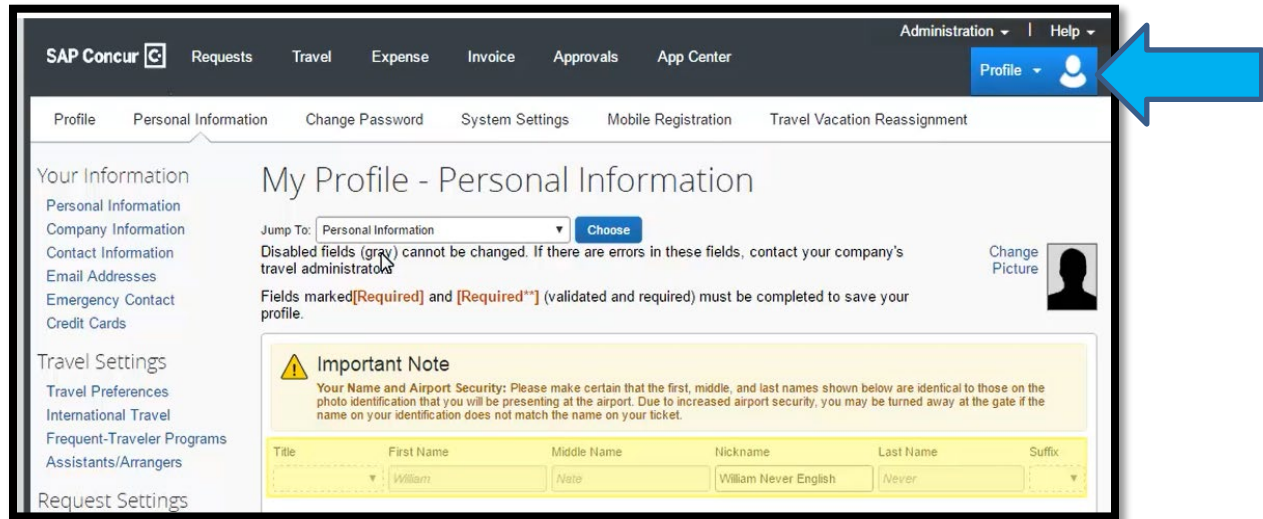


Concur Travel Request – Job Aid for Participants/Fellows

IMPORTANT TIPS:

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



- ***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:

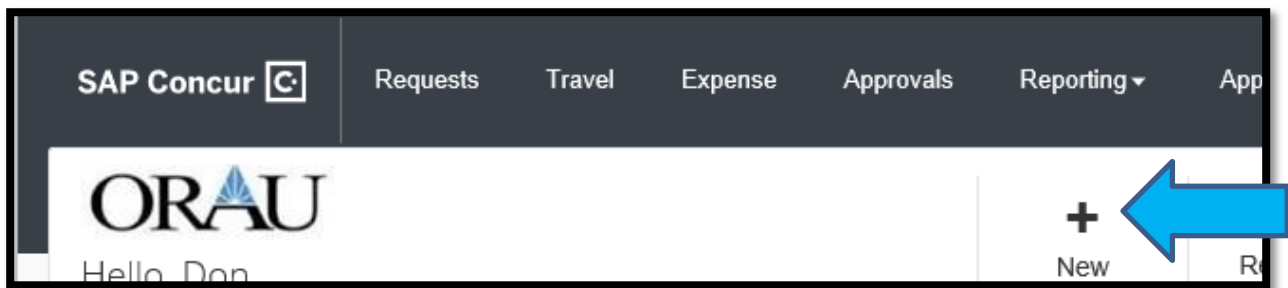
- Discuss your travel plans with your travel approver(s) so they will expect the Travel Request notification.
- Using the Concur Booking Tool, gather estimated costs for expense items such as airfare, lodging, car rental or other transportation, conference fees, mileage, and airline baggage fees.
- M&IE (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>) Note: The M&IE allowance for first and last day of travel is 75% of the daily rate.

NOTE:

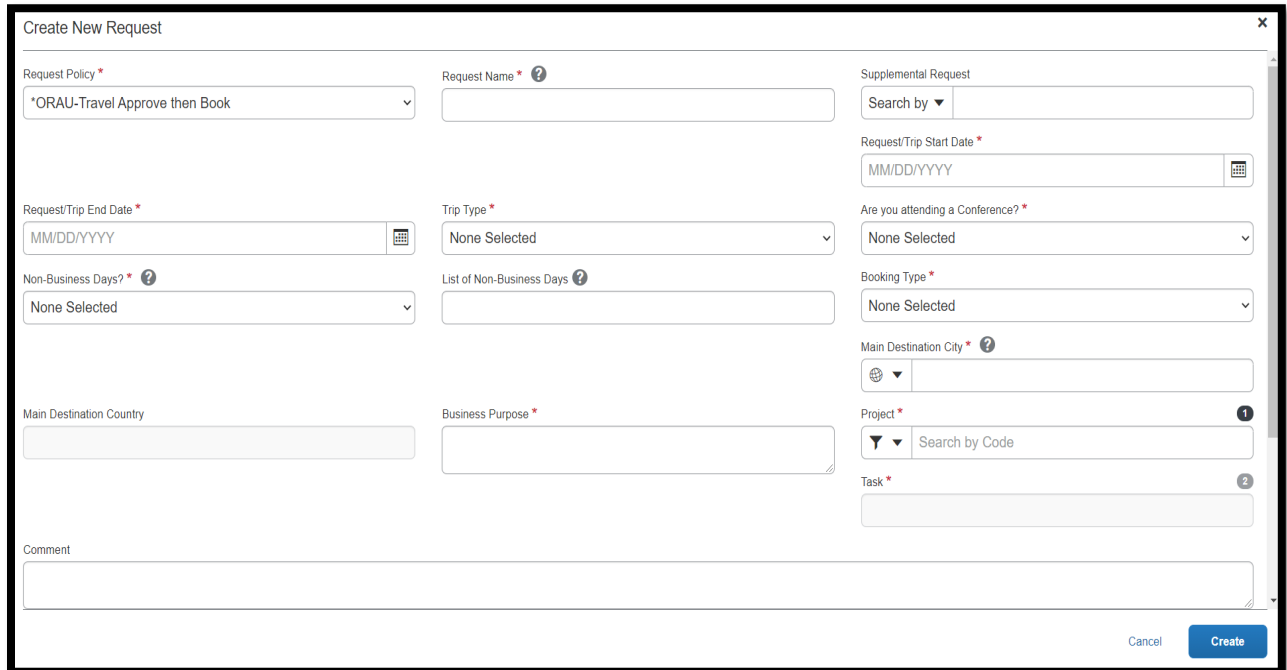
- A **red asterisk *** indicate a required field.
- Grey question marks “?” are **Tool Tips** to assist you. To see the Tool Tips, hover your cursor over the “?”.

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**:

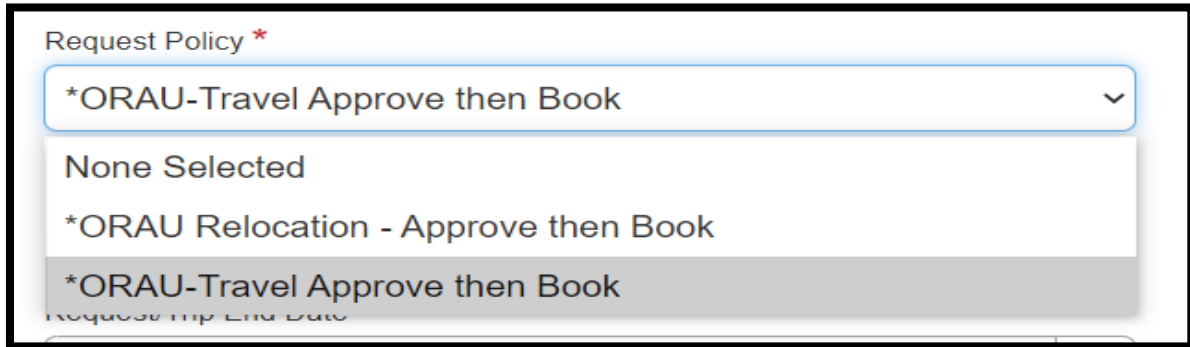


- 3) Click on **Start a Request** to open the **Create New Request** form:

A screenshot of the 'Create New Request' form. The form is titled 'Create New Request' and contains several sections of input fields. The 'Request Policy' dropdown is set to '*ORAU-Travel Approve then Book'. The 'Request Name' field has a grey question mark icon. The 'Request/Trip Start Date' and 'Request/Trip End Date' fields are date pickers. The 'Trip Type' dropdown is set to 'None Selected'. The 'List of Non-Business Days' field is empty. The 'Main Destination Country' and 'Main Destination City' fields are empty. The 'Business Purpose' field is empty. The 'Project' dropdown is set to 'Search by Code'. The 'Task' field is empty. 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**



Request Policy *

*ORAU-Travel Approve then Book

None Selected

*ORAU Relocation - Approve then Book

*ORAU-Travel Approve then Book

Request Trip End Date

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



Request Name * ?

Quick help

Example: Albany, NY 1/2/2021-1/7/2021

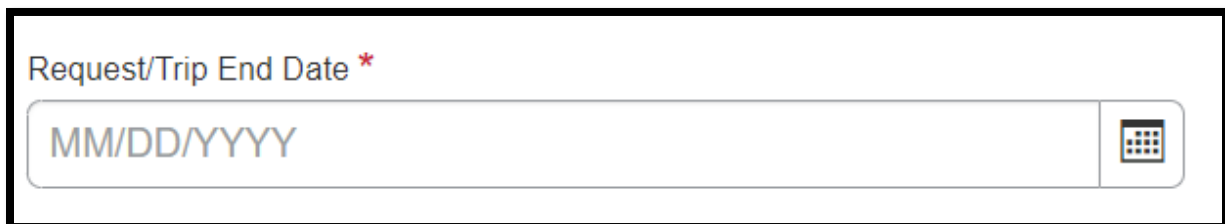
c. Request Trip Start Date – Enter the date the trip will begin or click on the calendar and select the **Trip Start Date**:



Request/Trip Start Date *

MM/DD/YYYY

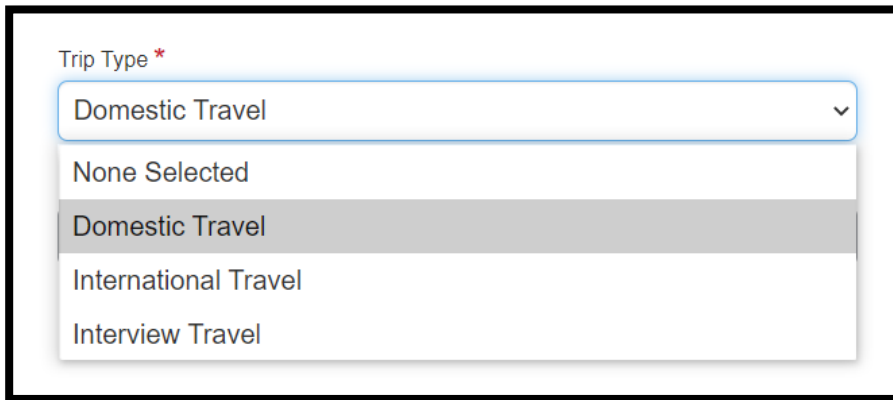
d. Request Trip End Date – Enter the date the trip will end or click on the calendar and select the **Trip End Date**:



Request/Trip End Date *

MM/DD/YYYY

e. Trip Type – Select **Domestic Travel, International Travel or Interview Travel**:



Trip Type *

Domestic Travel

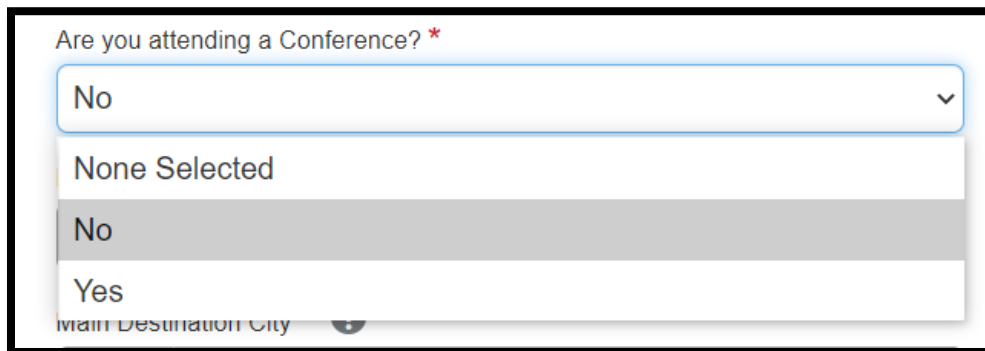
None Selected

Domestic Travel

International Travel

Interview Travel

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



Are you attending a Conference? *

No

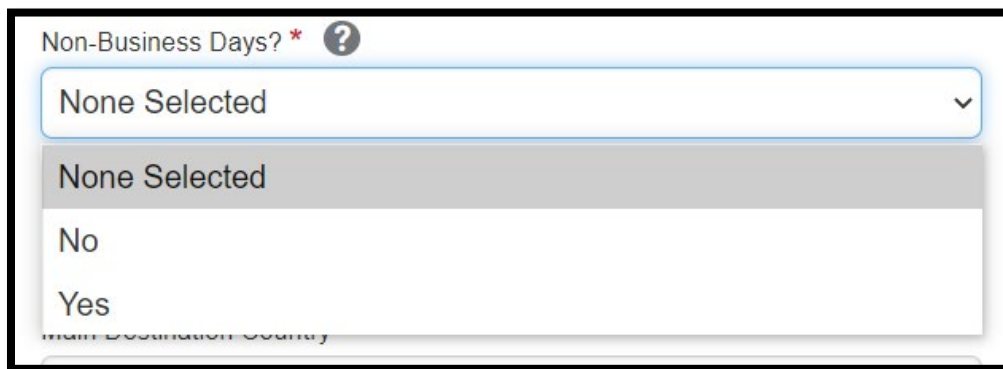
None Selected

No

Yes

Main Destination City

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



Non-Business Days? * ?

None Selected

None Selected

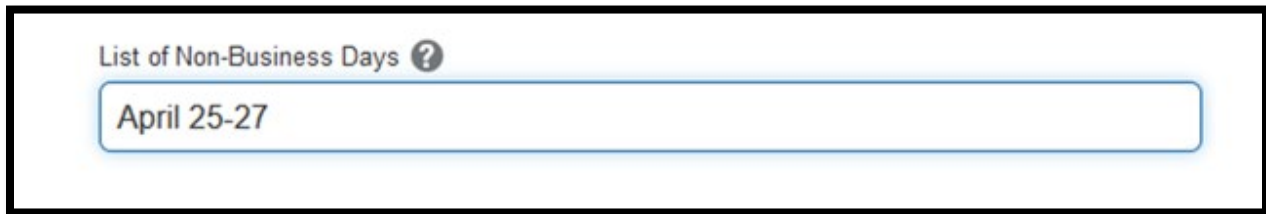
No

Yes

Main Destination Country

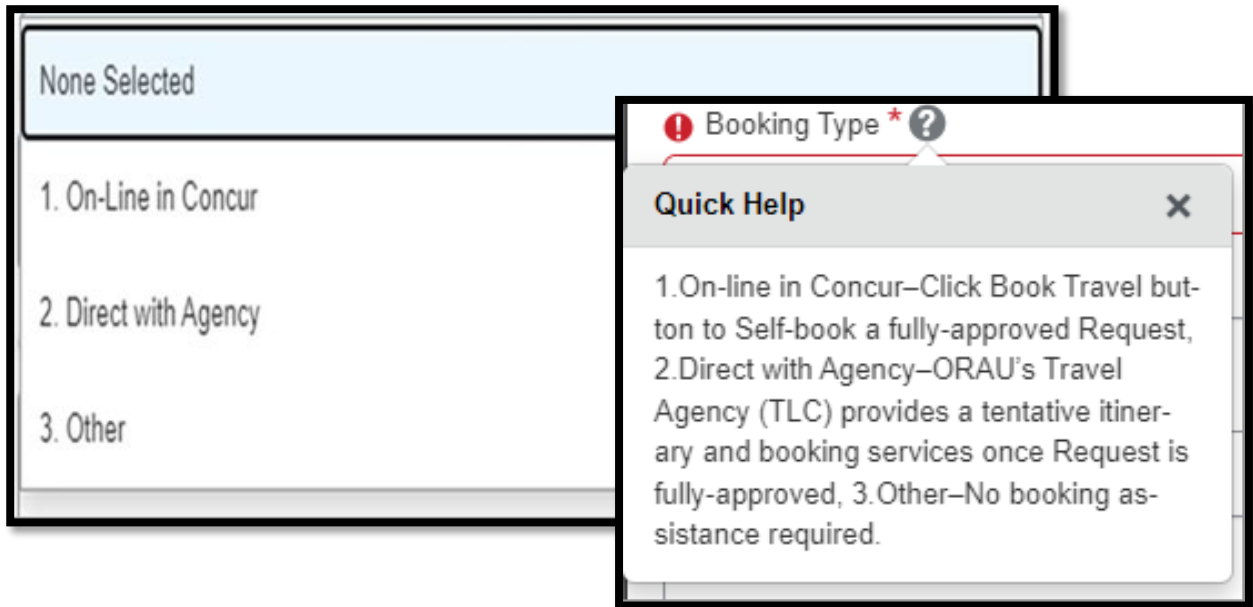
Note: If you are including non-business days (personal travel) in your trip, you will need to book travel using the “Direct with Agency” booking option below so that the agency can provide a cost comparison for non-business/personal travel expenses in your Travel Request. It is your responsibility to 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:



None Selected

1. On-Line in Concur
2. Direct with Agency
3. Other

Quick Help

1. On-line in Concur–Click Book Travel button to Self-book a fully-approved Request, 2. Direct with Agency–ORAU’s Travel Agency (TLC) provides a tentative itinerary and booking services once Request is fully-approved, 3. Other–No booking assistance required.

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 then “Book Travel” button to Self-Book your travel:



READY TO BOOK 08/04/2022

Demo for Denver 8/4 - 7

\$1,596.50

Approved - Pending Booking

More Actions ▾ Book 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

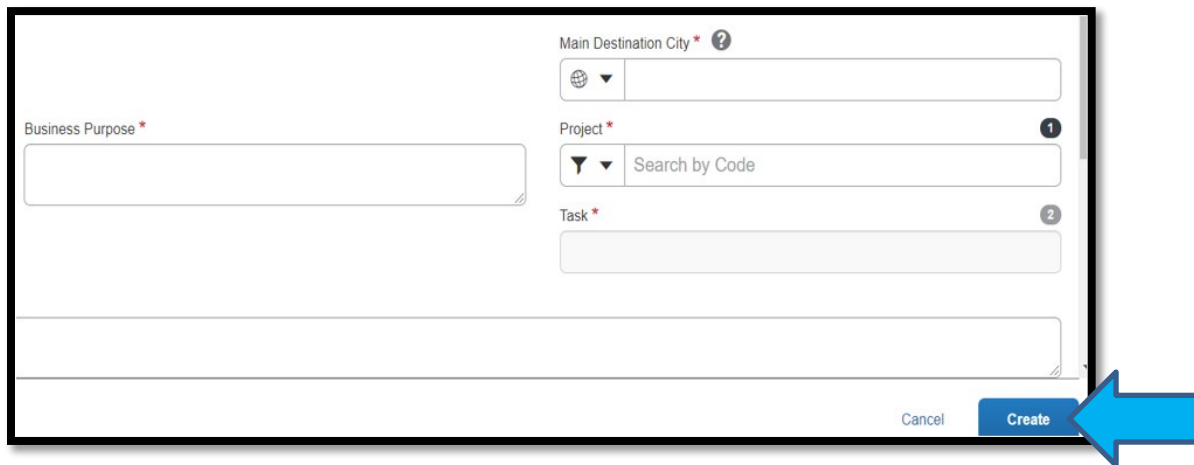
k. Main Destination City – Enter the main city of lodging

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:

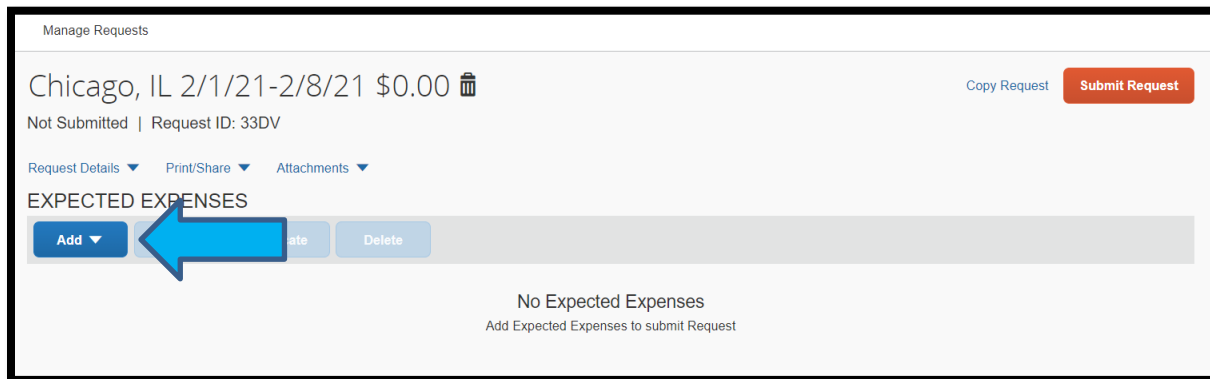


The screenshot shows a web form for creating a travel request. It includes several input fields: 'Main Destination City' with a globe icon and a question mark, 'Business Purpose' with a red asterisk, 'Project' with a dropdown arrow and 'Search by Code' text, and 'Task' with a red asterisk. At the bottom right, there are 'Cancel' and 'Create' buttons. A large blue arrow points directly to 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.



The screenshot shows the 'Manage Requests' interface. At the top, it displays 'Chicago, IL 2/1/21-2/8/21 \$0.00' and 'Not Submitted | Request ID: 33DV'. Below this are links for 'Request Details', 'Print/Share', and 'Attachments'. The 'EXPECTED EXPENSES' section is highlighted, showing an 'Add' button with a dropdown arrow, a 'Delete' button, and a 'Submit Request' button. A large blue arrow points to the 'Add' button.

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

New Expense: Hotel Reservation Cancel **Save**

* Required field

City *	Date	At
<input type="text"/>	<input type="text" value="02/01/2021"/>	<input type="text" value="hh:mm A"/>
Detail *	Date	At
<input type="text"/>	<input type="text" value="02/08/2021"/>	<input type="text" value="hh:mm A"/>
Comment		
<input type="text"/>		
*Expenditure Type Code		
<input type="text"/>		
Amount * ?	Currency *	
<input type="text"/>	<input type="text" value="US, Dollar"/>	

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**.

New Expense: Meals - per diem \$0.00 Cancel **Save**

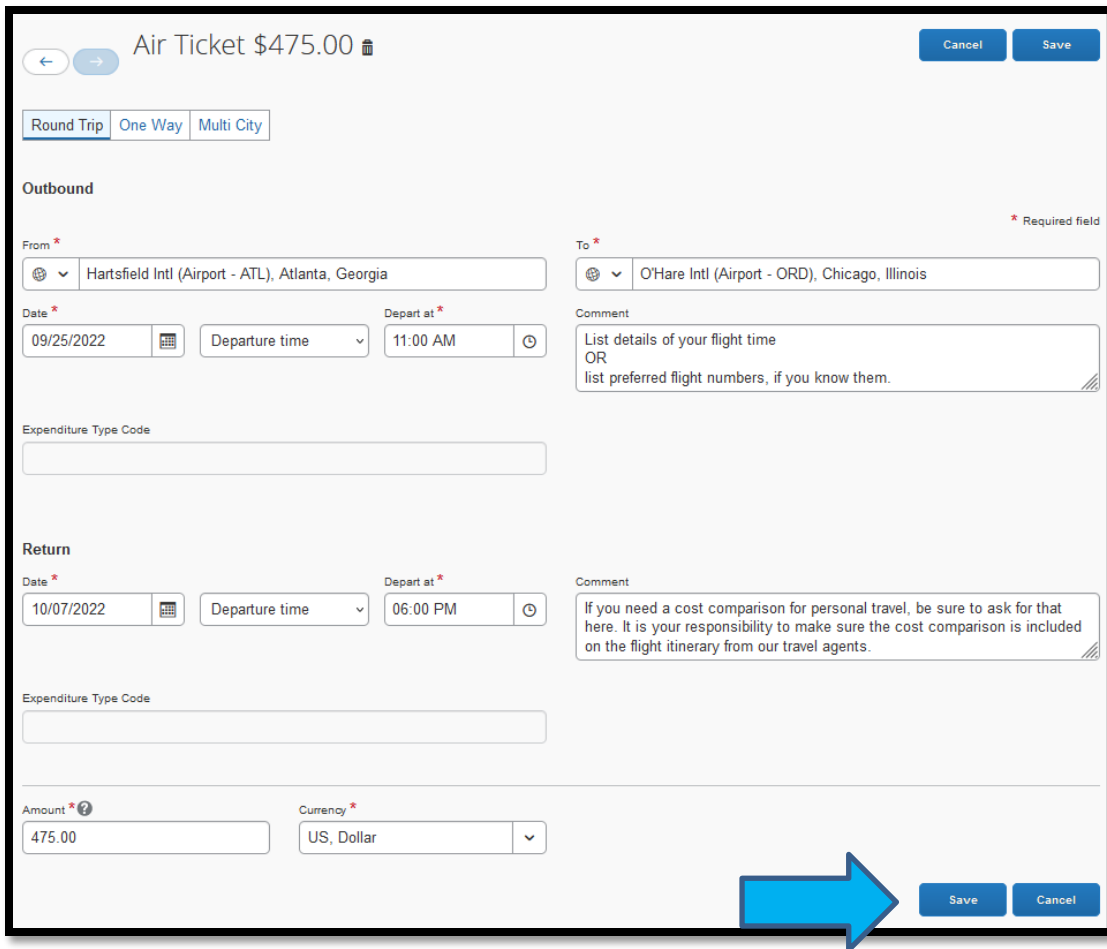
02/01/2021

⊙ Allocate

Trip Start Date	Trip End Date
<input type="text" value="02/01/2021"/>	<input type="text" value="02/08/2021"/>
Description	Transaction Amount ?
<input type="text"/>	<input type="text"/>
	Currency
	<input type="text" value="US, Dollar"/>
Expenditure Type Code	City
<input type="text"/>	<input type="text" value="Chicago, Illinois"/>
	Comment
	<input type="text"/>

Save ←

d. **New Expense: Air Ticket** – Enter the required information and click **Save**.



← → Air Ticket \$475.00 Cancel Save

Round Trip One Way Multi City

Outbound

From * To * * Required field

Date * Depart at *

Comment
List details of your flight time
OR
list preferred flight numbers, if you know them.

Expenditure Type Code

Return

Date * Depart at *

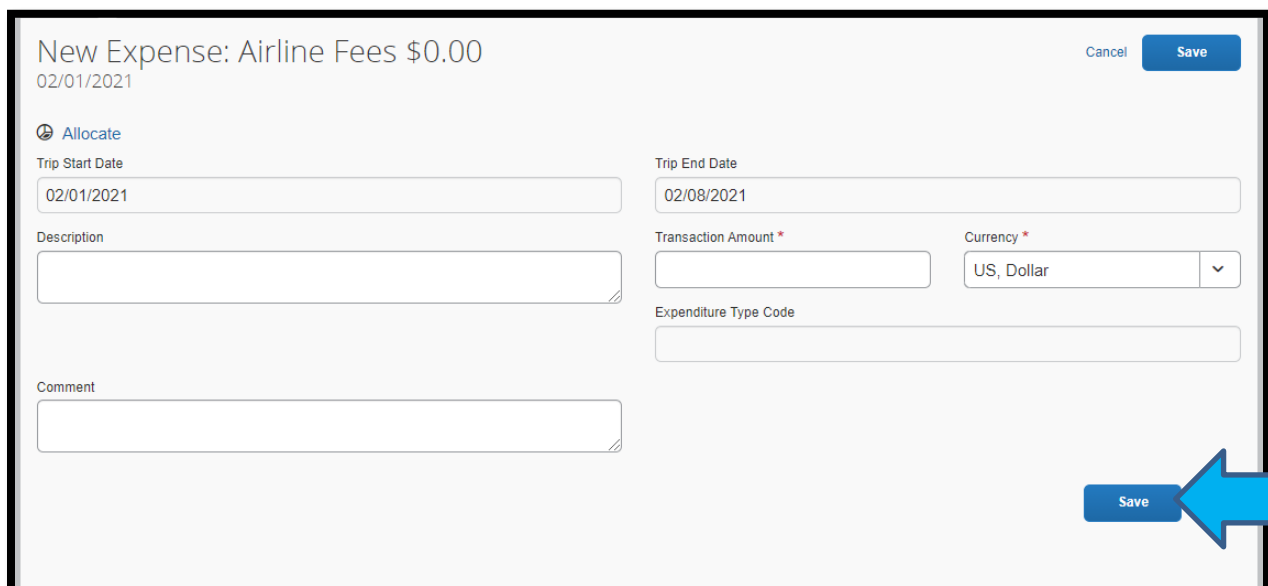
Comment
If you need a cost comparison for personal travel, be sure to ask for that here. It is your responsibility to make sure the cost comparison is included on the flight itinerary from our travel agents.

Expenditure Type Code

Amount * Currency *

Save Cancel

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



New Expense: Airline Fees \$0.00 Cancel Save

02/01/2021

Allocate

Trip Start Date Trip End Date

Description Transaction Amount * Currency *

Expenditure Type Code

Comment

Save

f. **New Expense: Car Rental** – Enter the required information and click **Save**.

Cancel Save

* Required field

Pick up City *

Date At

Detail *

Drop off City *


Date At

Detail

Comment

Expenditure Type Code


Amount * Currency *

Save 

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

Cancel Save

New Expense: Parking \$0.00
02/01/2021


 Allocate

Trip Start Date Trip End Date

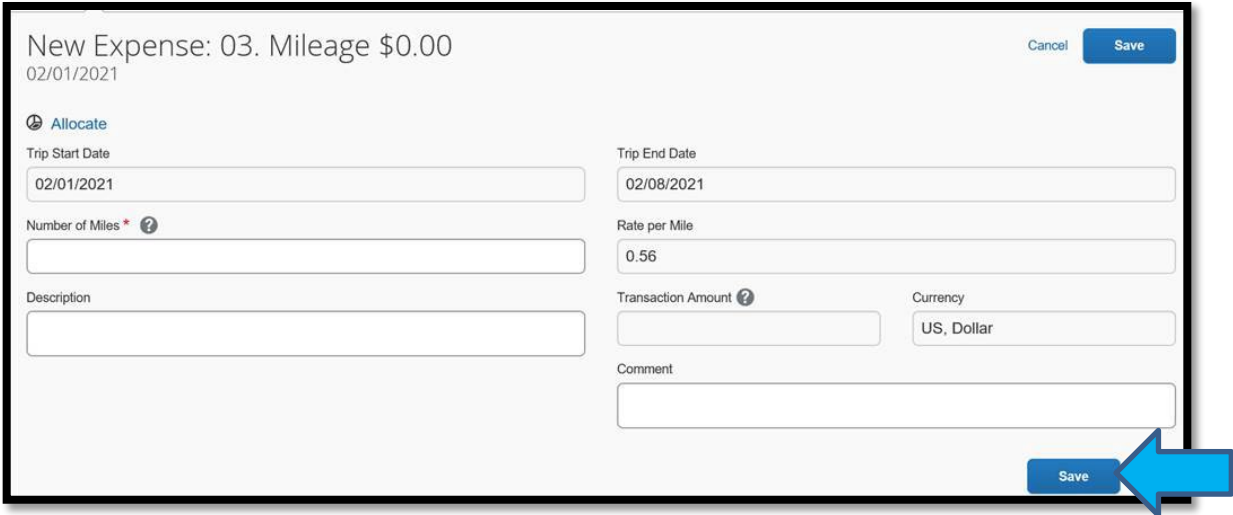
Description

Transaction Amount * Currency *

Comment

Save 

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: 03. Mileage \$0.00
02/01/2021


[Allocate](#)

Trip Start Date: 02/01/2021 Trip End Date: 02/08/2021

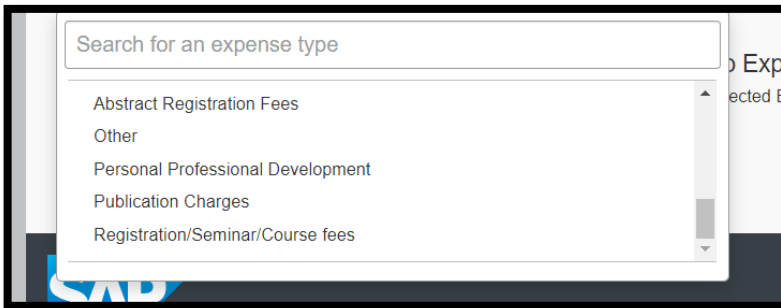
Number of Miles * ? Rate per Mile: 0.56

Description: Transaction Amount ? Currency: US, Dollar

Comment:


[Save](#) 

- 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.

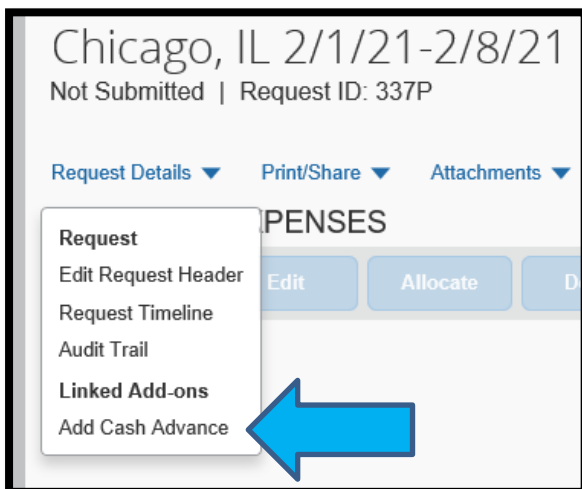


Search for an expense type

- Abstract Registration Fees
- Other
- Personal Professional Development
- Publication Charges
- Registration/Seminar/Course fees




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



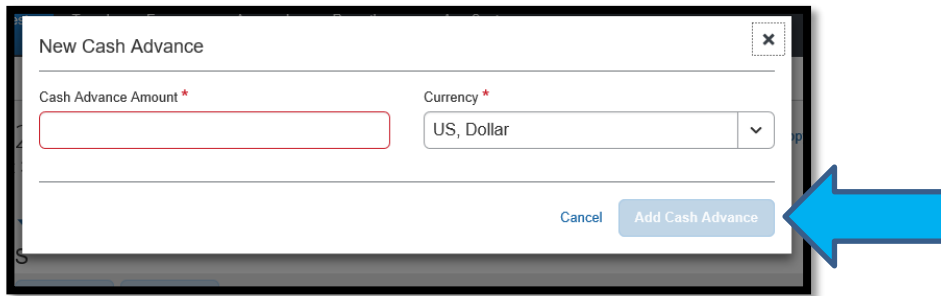
Chicago, IL 2/1/21-2/8/21
Not Submitted | Request ID: 337P

[Request Details](#) ▼ [Print/Share](#) ▼ [Attachments](#) ▼

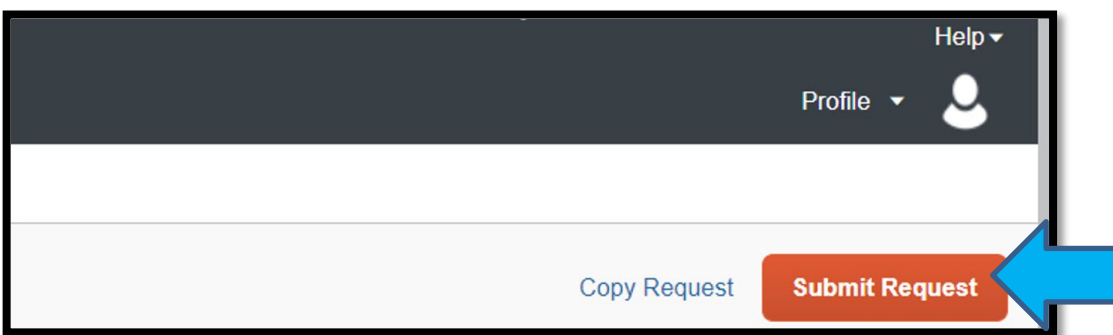
EXPENSES

[Request](#)
[Edit Request Header](#) [Edit](#) [Allocate](#) [D](#)
[Request Timeline](#)
[Audit Trail](#)
Linked Add-ons
[Add Cash Advance](#) 

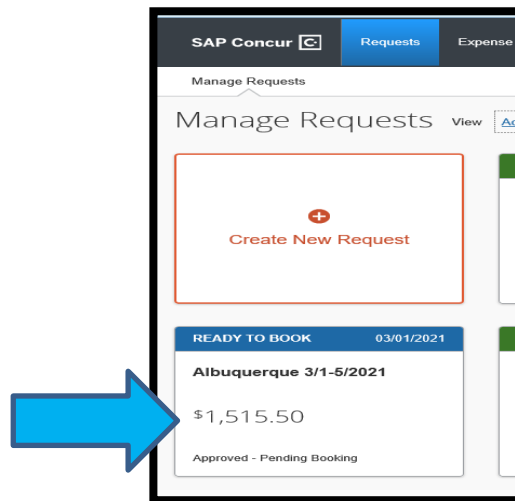
Fill in the amount needed for per diem and then click the **Add Cash Advance** button.



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 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:



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.