



Concur Expense – Job Aid for Participants/Fellows

Once you have completed your trip, log into [Zintellect - CLICK HERE](#), click on **View Travel** in the participant dashboard, then **Go to Concur** in the top right corner of the page. You will automatically be taken to the Concur home page where you will submit your trip expenses for reimbursement.

Dashboard Opportunity Catalog About Help Welcome

My Offers My Favorites

Click here to access the Travel Dashboard and to access Concur [View Travel](#)

Advanced Bearings for Oil-Free Compact Turbomachinery

Offer Accepted
Apt. Dates: 11/2/2020 - 11/1/2021

[Download Apt. Letter](#) [Download Terms of Apt.](#)

[Complete Documents](#)

ORAU

Participant Travel

Concur Login ID: 000 z@orau.travel
[Go to Concur](#)

[Request Report](#) [Expense Report](#)

Enter Keyword

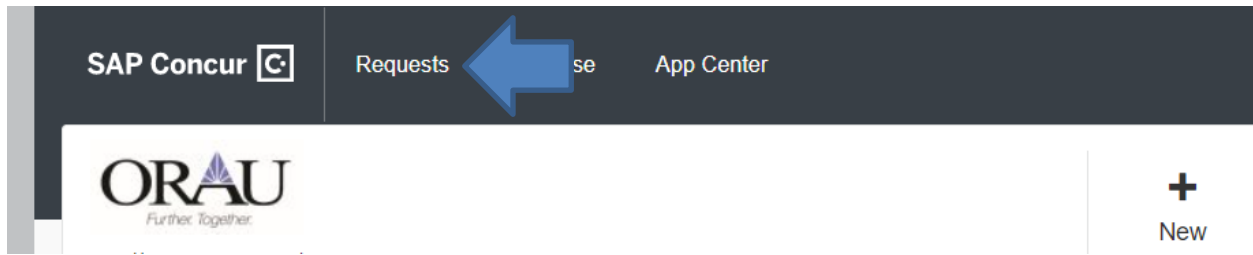
Click here for more information about this trip

Report Name	Start Date	End Date	Approved Expense	Approved Status	Actions
Dallas, TX 1/25-28/21	1/25/2021 12:00:00 AM	1/28/2021 12:00:00 AM	\$1509.00	Approved	[icon]
Testing for [redacted]	11/7/2021 12:00:00 AM	11/13/2021 12:00:00 AM	\$1972.00	Not Submitted	[icon]
Washington DC 1/17/21-1/21/21	1/17/2021 12:00:00 AM	1/21/2021 12:00:00 AM	\$2885.40	Approved	[icon]

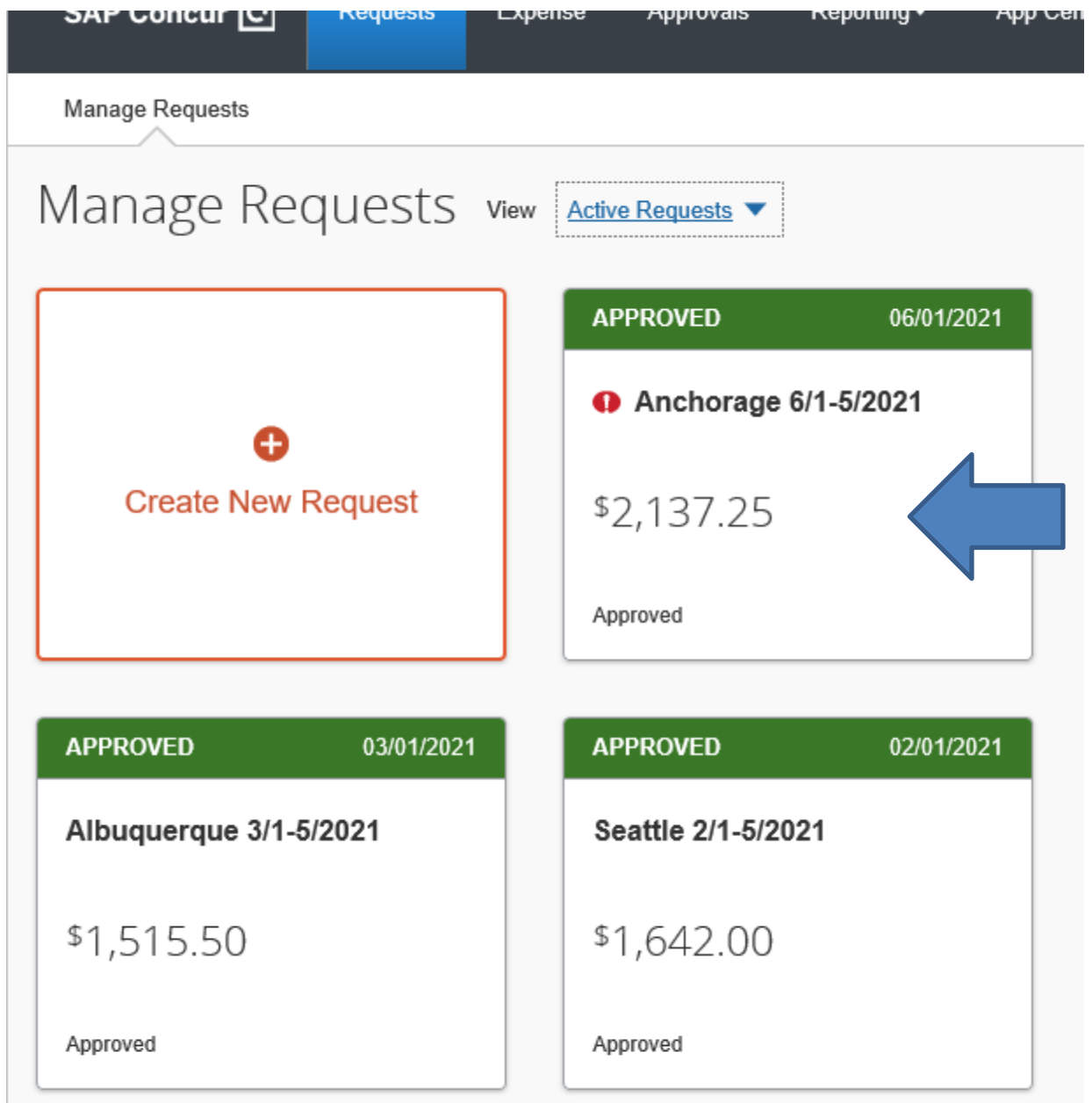
10 1 to 3 of 3

[Concur Travel Dashboard](#)

To start a new Expense report, Click on **Requests** in the header. This will display your **ACTIVE REQUESTS** in the system.



Select/Click the trip you wish to create an EXPENSE report for.





The following page will display showing information from your Request for this trip. To create an Expense Report, **click on Create Expense Report** in the top right corner.

Notice the **\$500 Cash Advance** shown on this request that will be deducted from the Expense Report Total.

Anchorage 6/1-5/2021 \$2,137.25 More Actions Create Expense Report

Approved | Request ID: 33DE

CASH ADVANCES: 1

Amount
\$500.00
\$500.00

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

EXPECTED EXPENSES

Expense type	Details	Date	Amount	Requested
Air Ticket	Chattanooga (CHA) - Anchorage (ANC) : Round Trip	06/01/2021	\$600.00	\$600.00
Registration/Seminar/Course fees	Animal Study Conf	06/01/2021	\$500.00	\$500.00
Meals - per diem	Anchorage, Alaska	06/01/2021	\$508.50	\$508.50
Hotel Reservation	Anchorage, Alaska	06/01/2021	\$300.00	\$300.00
Car Rental	Anchorage, Alaska - Anchorage, Alaska	06/01/2021	\$200.00	\$200.00
03. Mileage	roundtrip home to airport	06/01/2021	\$28.75	\$28.75

Estimated Total: \$2,137.25

After clicking Create Expense Report, an Expense Report will be created and this page will appear.



Manage Expenses View Transactions Cash Advances

i There are cash advances available to add to this report. [View](#) ✕

Anchorage 6/1-5/2021 \$0.00 [Submit Report](#)

Not Submitted

[Report Details](#) [Print/Share](#) [Manage Receipts](#) [Travel Allowance](#)

REQUEST	
Approved	Remaining
\$2,137.25	\$-997.07


[Add Expense](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#) [Combine Expenses](#) [Move to](#)

No Expenses
Add expenses to this report to submit for reimbursement.

To Begin, click on the Travel Allowance Tab, then Manage Travel Allowance

[Report Details](#) [Print/Share](#) [Manage Receipts](#) [Travel Allowance](#)

[REQUEST](#) [Manage Travel Allowance](#)



The page below will display. At this point, you can review the available itineraries at the bottom of the page. If your itinerary is displayed, click on the particular itinerary and hit the ASSIGN button.

[Create New Itinerary](#) | [Available Itineraries](#) | [Expenses & Adjustments](#) | [Reimbursable Allowances Summary](#)

Assigned Itineraries


[Edit](#) | [Unassign](#)

Departure City	Date and Time ▲
No Assigned Itineraries Found	

Available Itineraries

▼ [Delete](#) [Assign](#)

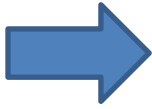
Departure City	Date and Time ▲
Tampa, Florida	01/28/2021 12:00 PM
- Itinerary: Miami 2/1-3/21	
Chattanooga, Tennessee	02/01/2021 12:00 PM
Miami, Florida	02/03/2021 12:00 PM
- Itinerary: Brussels 5/1-5/2021	
Chattanooga, Tennessee	05/01/2021 12:00 PM
Brussels, BELGIUM	05/05/2021 07:00 AM
- Itinerary: Anchorage 6/1-5/2021	
Chattanooga, Tennessee	06/01/2021 12:00 PM
Anchorage, Alaska	06/05/2021 08:00 AM



If your itinerary is not displayed, select the **Create New Itinerary** tab.



Travel Allowances For Report: Anchorage 6/1-5/2021



[Create New Itinerary](#) [Available Itineraries](#) [Expenses & Adjustments](#) [Reimbursable Allowances Summary](#)

Assigned Itineraries

[Edit](#) [Unassign](#)

Departure City	Date and Time ▲
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The page below will be displayed. Complete the required info and hit the save button below.

New Itinerary Stop

Departure City

Date Time

Arrival City

Date Time

Next, you will fill in the info for the return portion of your trip, hit save again and done.

New Itinerary Stop

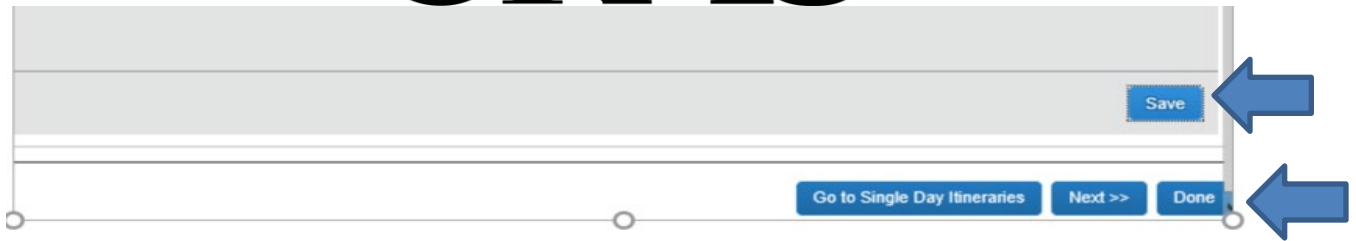
Departure City

Date Time

Arrival City

Date Time

Once you have entered your full itinerary, click **Save** at the bottom of the page and then **Done**.



The page will display as below. If correct, hit the **Next** button in the bottom right-hand corner of the page.

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Assigned Itineraries

Edit Unassign

Departure City	Date and Time	Arrival City
Itinerary: Anchorage 6/1-5/2021		
Chattanooga, Tennessee	06/01/2021 12:00 PM	Anchorage, Alaska
Anchorage, Alaska	06/05/2021 08:00 AM	Chattanooga, Tennessee

<< Previous Next >>

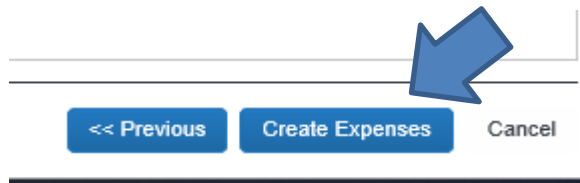
The page will now display your meal allowance for the travel period. Select any meals that were included on your trip. You should also exclude any personal travel days.

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Show dates from to

Exclude All <input type="checkbox"/>	Date/Location	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	06/01/2021 Anchorage, Alaska	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$84.75
<input type="checkbox"/>	06/02/2021 Anchorage, Alaska	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$113.00
<input type="checkbox"/>	06/03/2021 Anchorage, Alaska	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$113.00
<input type="checkbox"/>	06/04/2021 Anchorage, Alaska	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$113.00
<input type="checkbox"/>	06/05/2021 Anchorage, Alaska	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$84.75

Once finished, click the **Create Expenses** button



You will now enter your trip expenses.

Click **Add Expense**:

SAP Concur Requests **Expense** Approvals Reporting ▾ App Center

Manage Expenses View Transactions Cash Advances

i There are cash advances available to add to this report. [View](#)

Anchorage 6/1-5/2021 \$0.00

Not Submitted

Report Details ▾ Print/Share ▾ Manage Receipts ▾ Travel Allowance ▾

REQUEST

Approved \$2,137.25	Remaining \$-997.07
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Add Expense Edit Delete Copy Allocate Combine Expense

First, select from the Available Expenses, which are expenses that were prepaid on your behalf such as airline tickets. If your ticket is displayed, check the box beside the ticket and click **Add to Report**. If you did not have any pre-paid items, click on **Create New Expense**.



Add Expense

6 Available Expenses		+ Create New Expense			
<input type="checkbox"/>	ORAU Ghost Card (SunTrust Bank)	Airfare	JETBLUE 2797293079722	03/22/2019	\$284.60
<input checked="" type="checkbox"/>	ORAU Ghost Card (SunTrust Bank)	Airfare	AMERICAN AIR0017293079489 Fort Worth, Texas	03/15/2019	\$752.39
<input type="checkbox"/>	ORAU Ghost Card (SunTrust Bank)	Airfare	DELTA AIR 0067292890552 Raleigh, North Carolina	03/08/2019	\$361.08
<input type="checkbox"/>	ORAU Ghost Card (SunTrust Bank)	Airfare	DELTA AIR 0067289418074 Raleigh, North Carolina	01/24/2019	\$1,012.87

Displayed expenses: 6, Total: 6

Close [Add To Report](#)

Next, click on the Expense Category that you have Expenses to add to. In this example, we will use Airfare.

Add Expense

6 Available Expenses [+ Create New Expense](#)

Search for an expense type

- ^ Recently Used
 - Hotel
 - Airfare
 - Personal Car Mileage
 - Miscellaneous
 - Rideshare/Taxi
- ^ 01. Travel Expenses
 - Hotel
 - Laundry
- ^ 02. Transportation

After you click on **Airfare**, this page will appear. Simply fill in the required fields.

Please Note: A paid receipt is required for any airline ticket, hotel, car rental or any expense over \$75.

Click the button on the **Attach Receipt** page and follow the directions for uploading your receipt

Manage Expenses View Transactions Cash Advances

New Expense

Cancel Save Expense Hide Receipt

Details Itemizations

Allocate

Expense Type * Airfare

Transaction Date * MM/DD/YYYY Business Purpose * to study the animals

Ticket Number

Vendor * Search for Vendor Airline Travel Service Code None Selected

Departing City * Payment Type * Cash

Amount * Currency * US, Dollar

Request * 06/01/2021, \$600.00 - Anchorage 6/1-5/20

Comment

Attach Receipt Image

After you have uploaded the receipt, click **Save Expense**.

New Expense

Cancel Save Expense Hide Receipt

Details Itemizations

Allocate

Expense Type * Airfare

Transaction Date * 02/19/2021 Business Purpose * to study the animals

Ticket Number 006123456789

Vendor * *Delta Air Lines Airline Travel Service Code Coach Class

Departing City * Chattanooga, Tennessee Payment Type * Cash

Amount * 600.00 Currency * US, Dollar

Request * 06/01/2021, \$600.00 - Anchorage 6/1-5/20

Comment

Airfare receipt

Airfare.pdf Detach

*** In some cases, Concur may require and itemization of expenses, such as Hotel expenses. You must complete this step or Concur will not calculate your lodging correctly.**



Complete the information for the Hotel Expense and then click **Itemizations**.

New Expense

Details | **Itemizations**

Expense Type *
Hotel

Check-in Date * 06/01/2021 | **Check-out Date *** 06/05/2021 | **Nights:** 4

Transaction Date * 06/05/2021 | **Business Purpose *** to study the animals

Vendor * *Hilton Hotels

City of Lodging * Anchorage, Alaska | **Payment Type *** Cash

Amount * 240.00 | **Currency *** US, Dollar

Travel Allowance

Lodging Nightly Rate Over GSA
None Selected

Request *
06/01/2021, \$300.00 - Anchorage 6/1-5/20

Comment

Lodging Rate Selections:
None Selected
Best Available Rate within Reasonable Distance
GSA Rate Not Available
Meeting/Group Lodging Location
Most Cost Efficient Rate (Lodging + Transportation, etc. Combine)
Other (Please Note in Comments)

Hotel \$240.00 06/05/2021 | *Hilton Hotels Cancel

Details | **Itemizations**

Amount	Itemized	Remaining
\$240.00	\$0.00	\$240.00

Create Itemization | **More Actions** ▾




No Itemizations.
Create itemizations for the items on your receipt.

Attach Receipt Image

Next, choose whether your nightly rate was the same each night, or if it was not the same.



Hotel \$240.00 
06/05/2021 | *Hilton Hotels

Details		Itemizations	
Amount	\$240.00	Itemized	\$0.00
		 Remaining	\$240.00
New Itemization			
Expense Type *			
Hotel 			
Entry Type: Recurring Itemization 		06/01/2021 - 06/05/2021 (Nights: 4)	
Your hotel room rate was:			
The Same Every Night		Not the Same	
Room Rate (per night) *	Room Tax (per night)	Tax 2 (per night)	Tax 3 (per night)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>(Amounts in USD)</i>			
<input type="checkbox"/> Combine room rate and taxes into a single entry			
Save Itemization		Cancel	

Fill out the required information and attach your receipt. Then select **Save Itemization**.

A new page will display. Please note the amount remaining on the Itemization should now be \$0.00. (If it is not, you have not entered the total amount of the hotel, or the room rate correctly.)

Click **Save Expense**.



Hotel \$240.00
06/05/2021 *Hilton Hotels

Cancel **Save Expense**

Details Itemizations Hide Receipt

Amount \$240.00 Itemized \$240.00 Remaining \$0.00

Create Itemization More Actions

<input type="checkbox"/>	Alerts	Date	Expense Type	Requested
<input type="checkbox"/>		06/01/2021	Hotel	\$50.00
<input type="checkbox"/>		06/01/2021	Hotel Tax	\$10.00
<input type="checkbox"/>		06/02/2021	Hotel	\$50.00
<input type="checkbox"/>		06/02/2021	Hotel Tax	\$10.00
<input type="checkbox"/>		06/03/2021	Hotel	\$50.00
<input type="checkbox"/>		06/03/2021	Hotel Tax	\$10.00
<input type="checkbox"/>		06/04/2021	Hotel	\$50.00
<input type="checkbox"/>		06/04/2021	Hotel Tax	\$10.00

Hotel receipt

Your airfare and hotel costs will now display as separate line items on the Expense Report.

Add Expense Edit Delete Copy Allocate Combine Expenses Move to

<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>			Cash	Hotel	*Hilton Hotels Anchorage, Alaska	06/05/2021	\$240.00 Itemized
<input type="checkbox"/>			Cash	Airfare	*Delta Air Lines Chattanooga, Tennessee	02/19/2021	\$600.00
							\$840.00

Continue to add additional Expenses to the Expense Report as needed.

Add Expense

7 Available Expenses + Create New Expense

Search for an expense type

- Parking
- Public Transport
- Rental Vehicle
- Rental Vehicle Gas
- Rideshare/Taxi
- Tolls/Road Charges
- Train
- ^ 03. Mileage
 - Personal Car Mileage
- ^ 04. Office Expenses



For rental vehicles, some fields will be pre-populated from the Request. Complete the required fields, attach the receipt and hit save.

The image shows a screenshot of a web-based expense report form on the left and a sample car rental receipt on the right. The form contains the following fields:

- Expense Type ***: Rental Vehicle (dropdown menu)
- Transaction Date ***: 06/05/2021 (calendar icon)
- Business Purpose**: to study the animals (text input)
- Vendor ***: *National Car Rental (dropdown menu)
- Vehicle Type Rented ***: *Economy (dropdown menu)
- City of Purchase ***: Anchorage, Alaska (dropdown menu with globe icon)
- Payment Type ***: Cash (dropdown menu)
- Amount ***: 200.00 (text input)
- Currency ***: US, Dollar (dropdown menu)
- Request ***: 06/01/2021, \$200.00 - Anchorage 6/1-5/20 (text input)

The receipt on the right is a simple document with the text "Car rental receipt" centered on a white background with a grey border.

To enter **POV mileage** for travel from home to the airport and back, fill in the required fields. When you enter the distance, the amount of the reimbursement will automatically appear.

New Expense

Cancel [Save Expense](#)

[Details](#) [Itemizations](#) [Show Receipt](#)

[Allocate](#)

*** Required field**

Expense Type * Transaction Date * Purpose of the Trip *

From Location *

To Location * Payment Type Request *

Comment

Vehicle ID * Distance to Date Distance * Number of Passengers

Amount Currency Reimbursement Rates
[View all reimbursement rates](#)

To enter a registration fee expense, click on **Registration/Seminar/Course fees**.

Add Expense

[7 Available Expenses](#) [+ Create New Expense](#)

- 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



This screen will appear. The Transaction Date should be the date the payment was made. Attach your paid receipt, then Save Expense.

New Expense Cancel Save Expense

Details Itemizations Hide Receipt

Allocate * Required field

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

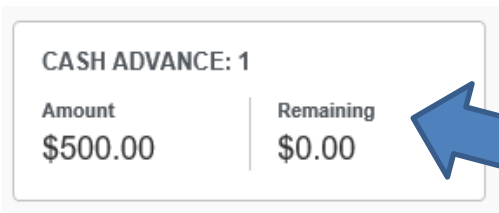
Request *
06/01/2021, \$500.00 - Anchorage 6/1-5/20

Once you have all your expense entered, you should see a summary page with your listed

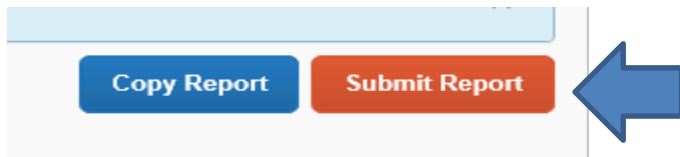


Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Approved
		Cash	Hotel	*Holiday Inn Chattanooga, Tennessee	06/05/2021	\$240.00 Itemized
		Cash	Meals - per diem	Anchorage, Alaska	06/05/2021	\$84.75
		Cash	Meals - per diem	Anchorage, Alaska	06/04/2021	\$113.00
		Cash	Meals - per diem	Anchorage, Alaska	06/03/2021	\$113.00
		Cash	Meals - per diem	Anchorage, Alaska	06/02/2021	\$113.00
		Cash	Meals - per diem	Anchorage, Alaska	06/01/2021	\$84.75
		Cash	Rental Vehicle	*National Car Rental Anchorage, Alaska	06/01/2021	\$200.00
		Cash	Personal Car Mileage		06/01/2021	\$28.75
		Cash	Airfare	*Delta Air Lines Chattanooga, Tennessee	03/10/2021	\$600.00
		Cash	Registration/Seminar/Course fees	Animal research group Anchorage, Alaska	12/10/2020	\$500.00
						\$2,077.25

The cash advance amount you received for your trip will be automatically deducted from your Expense total.



When complete, click the **Submit Report** button in the top right hand corner.



You will get the pop-up below. Review the information. If agreed, click the **Accept and Continue** button.



User Electronic Agreement ✕

By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate accounting of expenses incurred to accomplish the stated purpose of trip and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of over-payment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying in full for those expenses.

Cancel **Accept & Continue**

The Final page will show the Report Totals. The Amount Due will show the amount you will be paid, and if you owe anything back, it will show in the Owed Company section. Click Submit Report.

Report Totals ✕

Company Pays \$400.00 Employee	Employee Pays \$0.00 Company	
---------------------------------------------	-------------------------------------------	--

Amount Total: \$400.00	Due Employee: \$400.00	Owed Company: \$0.00
Requested Amount: \$400.00	Total Paid By Company: \$400.00	Total Owed By Employee: \$0.00

Cancel **Submit Report**