



## Concur Non-Travel Request Job Aid for ORAU Participants

To complete a request for non-travel related items, log into Zintellect, select *View Travel* on your participant dashboard, then select *Go to Concur*.

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](#)

### Participant Travel

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

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

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	<a href="#">✎</a>
Testing for	11/7/2021 12:00:00 AM	11/13/2021 12:00:00 AM	\$1972.00	Not Submitted	<a href="#">✎</a>
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	<a href="#">✎</a>

10 1 to 3 of 3 [Previous](#) 1 [Next](#)

[Concur Travel Dashboard](#)

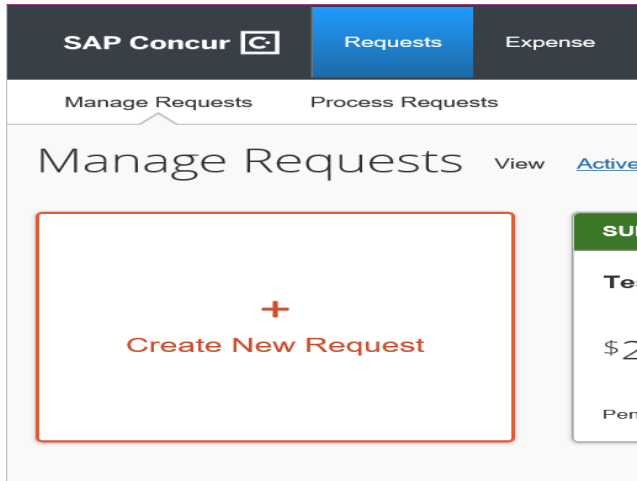
You will automatically be taken to Concur's home page.

SAP Concur [Requests](#) [Expense](#) [Approvals](#)

[Manage Requests](#) [Process Requests](#)



To start a new Request, Click on **Requests** then **Create a Request** and the **Request Header** will appear:



The Request Header will populate and default to the Travel policy.

Change the 'Request Policy' to **'\*ORAU-NonTravel Expense'**

The screenshot shows the 'Create New Request' form with the following fields:

- Request Policy \***: A dropdown menu with the selected value '\*ORAU-NonTravel Expense'. A red arrow points to this field.
- Request Name \***: A text input field with a question mark icon.
- Supplemental Request**: A section with a 'Search by' dropdown and 'Request ID' text.
- Request Start Date \***: A date input field with a calendar icon.
- Request End Date \***: A date input field with a calendar icon.
- Business Purpose \***: A text input field.
- Project \***: A dropdown menu with a search icon and the text 'Search by Code'. A circled '1' is next to it.
- Task \***: A text input field. A circled '2' is next to it.
- Comment**: A large text area at the bottom.

In the 'Request Name' field, enter a general description of the request.

Enter a Start and End Date. (This would be if you have a date range, if not enter the expected purchase date)

Enter a Business Purpose. (This is a more detailed description)



Click 'Create'

Create New Request

Request Policy \*  
\*ORAU-NonTravel Expense

Request Name \* ?  
Materials 1.7.22

Supplemental Request  
Search by Request ID

Request Start Date \*  
11/01/2021

Request End Date \*  
11/01/2021

Business Purpose \*  
Test

Project \*  
JR-PR-Peer Review Office (201217742)

Task \*  
OR-PR-P - General (0003)

Vendor Type  
Employee

Comment  
Retrieving Results

Cancel Create

Next, Click the 'Add' button below **EXPECTED EXPENSES**, and choose the appropriate Expense Type:

SAP Concur | Requests | Expense | Approvals | Reporting | App Center | Administration | Help | Profile

Manage Requests | Process Requests

Test Materials 1.7.22 \$100.00  
Not Submitted | Request ID: 33RY

Copy Request Submit Request

Request Details | Print/Share | Attachments

EXPECTED EXPENSES

Add | Edit | Allocate | Delete

Enter the description and Transaction Amount:

SAP Concur | Requests | Expense | Approvals | Reporting | App Center | Administration | Help | Profile

Manage Requests | Process Requests

New Expense: Business Amenities \$0.00  
11/01/2021

Allocate

Start Date  
11/01/2021

End Date  
11/01/2021

Description \*  
Transaction Amount \*  
Currency \*  
US, Dollar

Expenditure Type Code

Comment

Cancel Save



Once complete hit the 'Save' Button, and the screen below will populate.

Submit your request:

The screenshot shows the SAP Concur web interface. At the top, a purple banner indicates the user is logged into a test instance. The navigation bar includes 'SAP Concur', 'Requests', 'Expense', 'Approvals', 'Reporting', and 'App Center'. The main content area displays a request for 'Test Materials 1.7.22 \$200.00' with a trash icon. Below this, it says 'Not Submitted | Request ID: 33RY'. There are buttons for 'Copy Request' and 'Submit Request'. A section for 'EXPECTED EXPENSES' is partially visible at the bottom.

The box below will populate and if you agree with the statement, then click 'Accept & Continue', if you do not agree then click 'Cancel':

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

This is a true and accurate estimation of expenses that will be incurred to accomplish the stated purpose of the costs. The charges will be completed by the lowest reasonable cost method and I will comply with all policies.

Cancel

Accept & Continue



## Concur Non-Travel Expense Job Aid for ORAU Participants

To complete an Expense for non-travel related items, log into Zintellect, select *View Travel* on your participant dashboard, then select *Go to Concur*.

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 ORAU

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

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

[Complete Documents](#)

### 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 [Previous](#) 1 [Next](#)

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	<a href="#">View</a>
Testing for [redacted]	11/7/2021 12:00:00 AM	11/13/2021 12:00:00 AM	\$1972.00	Not Submitted	<a href="#">View</a>
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	<a href="#">View</a>

10 1 to 3 of 3 [Previous](#) 1 [Next](#)

[Concur Travel Dashboard](#)

You will automatically be taken to Concur's home page.

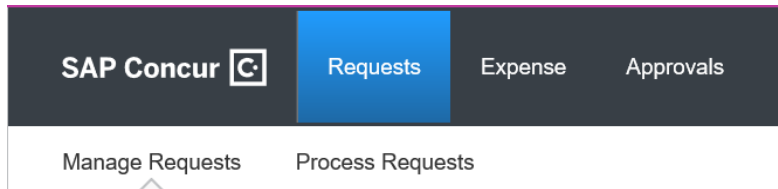
# SAP Concur

Requests Expense Approvals

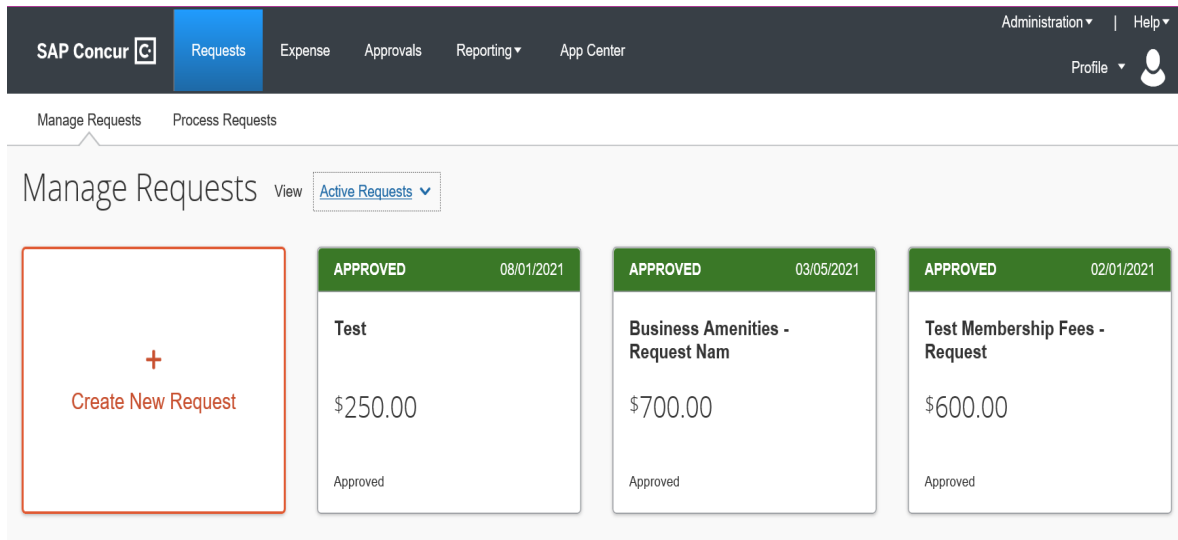
Manage Requests Process Requests



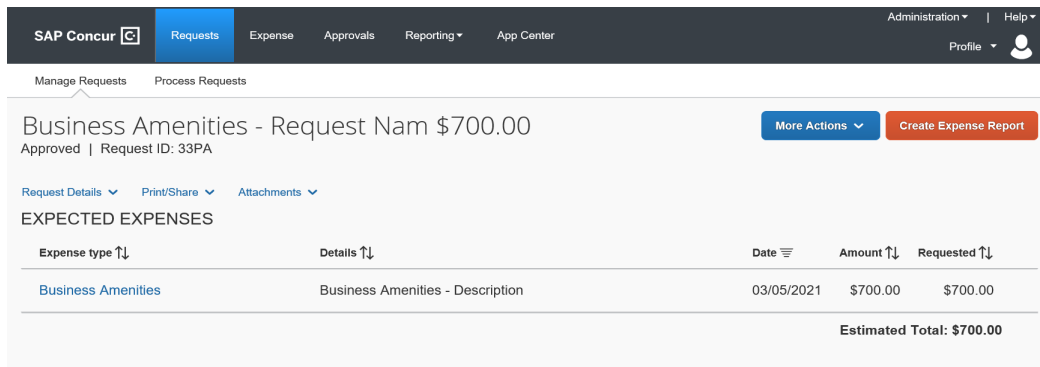
Click on **Requests**:



Review the Requests and click on the 'APPROVED' request that you want to create an expense report for:




Once the appropriate Request is opened click '**Create Expense Report**':





The Screen below will appear:



Business Amenities - Request Nam \$700.00  Submit Report

Not Submitted

Report Details v | Print/Share v | Manage Receipts v

**REQUEST**  
Approved  
\$700.00

Add Expense Edit Delete Copy Allocate Combine Expenses Move to v

<input checked="" type="checkbox"/>	Alerts <span style="font-size: 0.8em;">↑↓</span>	Receipt <span style="font-size: 0.8em;">↑↓</span>	Payment Type <span style="font-size: 0.8em;">↑↓</span>	Expense Type <span style="font-size: 0.8em;">↑↓</span>	Vendor Details <span style="font-size: 0.8em;">↑↓</span>	Date <span style="font-size: 0.8em;">≡</span>	Requested <span style="font-size: 0.8em;">↑↓</span>
<input checked="" type="checkbox"/>			Cash	Business Amenities		03/05/2021	\$700.00
							<b>\$700.00</b>


Click on the box by the expense listed and choose **'Edit'**.



Add Expense Edit Delete Copy Allocate Combine Expenses Move to v


Choose **'Edit'** then the below opens:

SAP Concur Requests Expense Approvals Reporting v App Center Administration v | Help v


Manage Expenses Process Reports


 Alerts: 2 ^

-  Missing required field: Enter Vendor Name.
-  You must attach a receipt image to this expense.

← → Business Amenities \$700.00 Cancel Save Expense

03/05/2021

Details vItemizations vHide Receipt 

 **Allocate**

Expense Type \* \* Required field

Business Amenities v



Transaction Date \*  
03/05/2021

Business Purpose \*  
Business Amenities - Description

Enter Vendor Name \*  
[Redacted]

City of Purchase  
[Dropdown]

Payment Type \*  
Cash

Amount \*  
700.00

Currency \*  
US, Dollar

Request \*  
03/05/2021, \$700.00 - Business A...

Comment  
[Text Area]

Attach Receipt Image



If any information has changed from the Request, update the information as needed.

An attachment of the purchase is required, so you'll have to upload by using the 'Attach Receipt Image'.

Comment  
[Text Area]

Save Expense Cancel

4.94 x 3.51 in  
Untitled.pdf  
Detach Append



Click **Submit Report**:

SAP Concur | Requests | Expense | Approvals | Reporting | App Center | Administration | Help

Profile

Manage Expenses | Process Reports

Test - Request Name Materials \$500.00 [Trash Icon]

Not Submitted

Submit Report





Review the statement, if you approve then click **'Accept & Continue'**:

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 the costs 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

Review your entry and if you wish to Submit, click the **'Submit Report'** button, if not click **'Cancel'** and edit your expense:

Company Pays \$500.00 Employee		Employee Pays \$0.00 Company	
Amount Total: \$500.00	Due Employee: \$500.00	Owed Company: \$0.00	
Requested Amount: \$500.00	Total Paid By Company: \$500.00	Total Owed By Employee: \$0.00	

Cancel      Submit Report