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*.

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

To start a new Request, Click on **Requests** then **Create a Request** and the **Request Header** will appear:
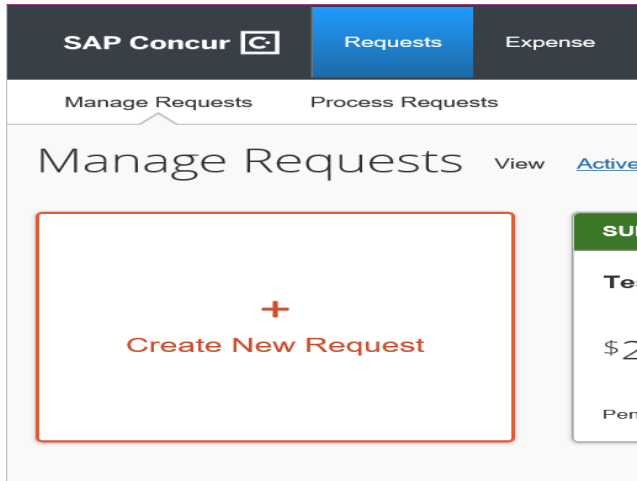
The Request Header will populate and default to the Travel policy.

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

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'

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

Enter the description and Transaction Amount:

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

Submit your request:

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*.

You will automatically be taken to Concur's home page.
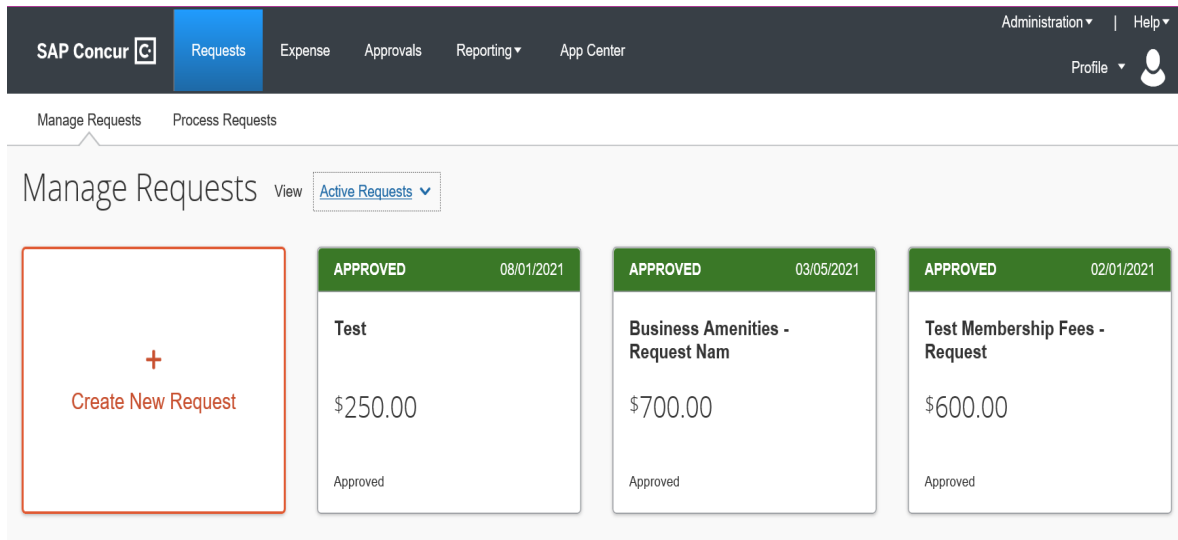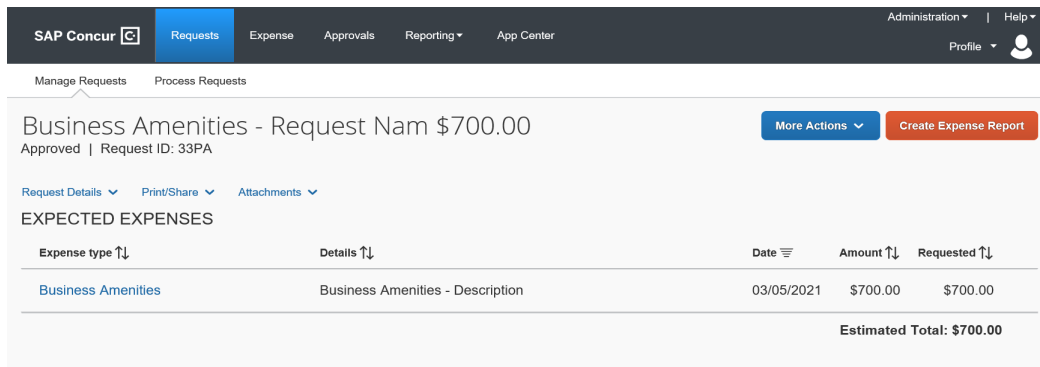
Click on **Requests:**

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:

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

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

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'.

Click **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	Employee Pays
$500.00	$0.00
Employee	Company

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

Cancel   **Submit Report**