Concur Request Job Aid for ORAU Participants

To complete a travel request, 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 **New** then **Start a Request** and the **Request Header** will appear:

**Request Header:**

The grey question marks are **Tool Tips** that are there to assist you. To see the **Tool Tips**, hover your mouse of the question mark and the **Tool Tip** will appear.

**Request Header Sections:**

**Request Policy** – Choose ORAU-Travel Approve then Book

**Request Name** – Enter the City, State, and Travel Dates as shown
Request Trip Start Date – Enter the date the trip will begin or click on the calendar and choose the start date.

Request Trip End Date – Enter the date the trip will end or click on the calendar and choose the end date.

Trip Type – Choose Domestic Travel, International Travel or Interview Travel
Are you attending a Conference? – Choose Yes or No

List of Non-Business Days – List the actual dates of personal travel.

Booking Type – Choose how you will book your travel reservations (Airfare, Hotel, Rental Car, etc.)

- **On-Line in Concur**: this is the preferred option for booking travel reservations. In addition, we recommend that all domestic airfare bookings are booked via the Concur Booking Tool.
- **Travel Agent Assisted**: this option will send an automatic notification to our contracted travel agency, and they will reach out to you to complete your reservations.
- **Other**: please choose this option if you are booking your own travel reservations.
**Main Destination City** - Enter the city you will be lodging in.

**Business Purpose** - Enter the reason you are traveling, and how it relates to your research appointment. *Simply stating conference, meeting or site visit is not sufficient.*

Once you have entered the required information on the Request Header, click the **Create** button.

Once you have clicked **Create**, this page will appear:
Next, Click the Add button and choose the expected expenses you will have on your trip.

01. Travel Expenses:

  - **Hotel Reservation** – enter the required information and click Save.

  ![Hotel Reservation Expense](image)

  - **Meals – Per Diem** – Concur will automatically calculate the Per Diem amount based on the location and dates entered on the Request Header. Click Save and this expense will be added to the Request.

  ![Meals Expense](image)

02. Transportation

  - **Air Ticket** – enter the required information and click save.
- **Airline Fees** – enter the required information and click save.

- **Car Rental** – enter the required information and click save.
- **Parking** – enter the required information and click save.
03. Mileage – enter the required information and click save.

![Mileage form]

07. Other - choose the applicable category, enter the required information and click save.

![Other category selection]

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Page 9 January 2022
**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.
After you have entered each expected expense on the Request click the **Submit Request** button located at the top right corner of the Request.

Your Request will automatically be sent to your mentor/coordinator, any additional approvers for your specific program, and for ORAU approval.

**Note:**

- If you will be making your own travel reservations, or requested that the Travel Agency assist you with them, once your **Travel Request** has been approved, the trip will show **Approved** in Concur.

- If you chose **Online in Concur** as your booking option, 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:
Booking Travel – To book your travel, see the Job Aid – Concur Booking Tool - Reservations

If you have any questions regarding the travel request please reach out to your program point of contact, or for general travel questions, you can email ORAUtraveladmin@orau.org.