



# Create and Submit a Request for Travel

## Guide for ARL-RAP and NPP Participants



# Concur Travel Request

This job aid provides instructions for the Concur Request component of the travel process. Specific tasks are described on the following slide pages:

- Preparation and Information Resources..... 3
- Access to the Concur Module..... 5
- Concur Profile Set-up..... 8
- Concur Dashboard ..... 10
- Create a Request Header..... 11
- Research Expected Expenses:
  - Travel module overview ..... 14
  - Air, Lodging, Car Rental..... 17
- Add Expenses to Request: ..... 24
  - Travel Allowance..... 25
  - Air, Lodging, Car Rental, Conference and Other Costs..... 30
- Submit a Request..... 31
- Track Approvals ..... 32



# Travel Process Components

1. Concur Request
  - Create a Request Header (trip overview)
  - Gather estimates for anticipated expenses
  - Complete and submit a travel request
2. Approval Process
  - Appointment advisor
  - ARL program managers
  - ORAU funding approver
3. Activity / Event
  - Attend, participate
4. Expense Report
  - Submit within 10 days of activity end date
  - Required for all approved requests



# Concur Travel Request

Prior to creating and submitting your Concur Travel Request:

- Discuss your trip and travel plans with your advisor
- Review your travel balance. The balance reflects travel & research (non-travel) funds.
  - Open your Concur dashboard home page. Select the menu item *Budget Dashboards* from under the Reporting option.
- Visit the ORAU Travel Center website and review the travel policy guide. ([orau.org/travel-central](http://orau.org/travel-central))
  - [ORAU Travel Center - For ORAU Research Participants](#)
- Contact your ORAU program team if you have questions.
  - ARL-RAP: [ARLFellowship@orau.org](mailto:ARLFellowship@orau.org)
  - NPP: [NPPTravel@orau.org](mailto:NPPTravel@orau.org)

# Access Concur Using Your Zintellect Account

The image shows two versions of the Zintellect application interface. The top version is a desktop view with a dark blue header containing the Zintellect logo (with the tagline 'climb higher') on the left and 'powered by ORAU' on the right. Below the header is a navigation bar with links for 'Opportunity Catalog', 'About', 'Help', 'Login', and 'Register'. The bottom version is a mobile view where the navigation bar is condensed into a hamburger menu icon on the right side of the header.

zintellect  
climb higher

powered by  
ORAU

Opportunity Catalog About Help Login Register

Opportunity  
hundreds of research internships, fellowships  
and private sector organizations.

powered by  
ORAU

Opportunity  
hundreds of research internships, fellowships, and  
private sector organizations.

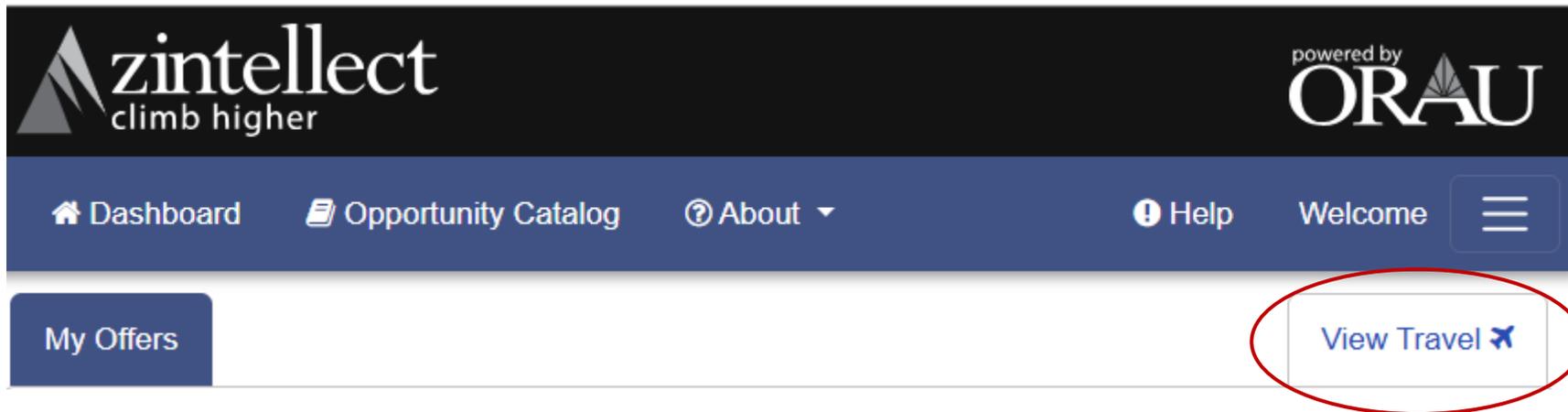
Open the Zintellect application and select Login to enter your User ID and password.

The Help, Login and Register options are condensed to a menu when the viewing screen is narrowed.

Contact ORAU if assistance is needed.

# Access Concur Using Your Zintellect Account

On the Zintellect Dashboard, click the *View Travel* button to review active requests and to access Concur.



# Review Active Travel Requests / Access Concur

**Participant Travel**

Concur Login ID: 000 [redacted] 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	
Testing for [redacted]	11/7/2021 12:00:00 AM	11/13/2021 12:00:00 AM	\$1972.00	Not Submitted	
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	

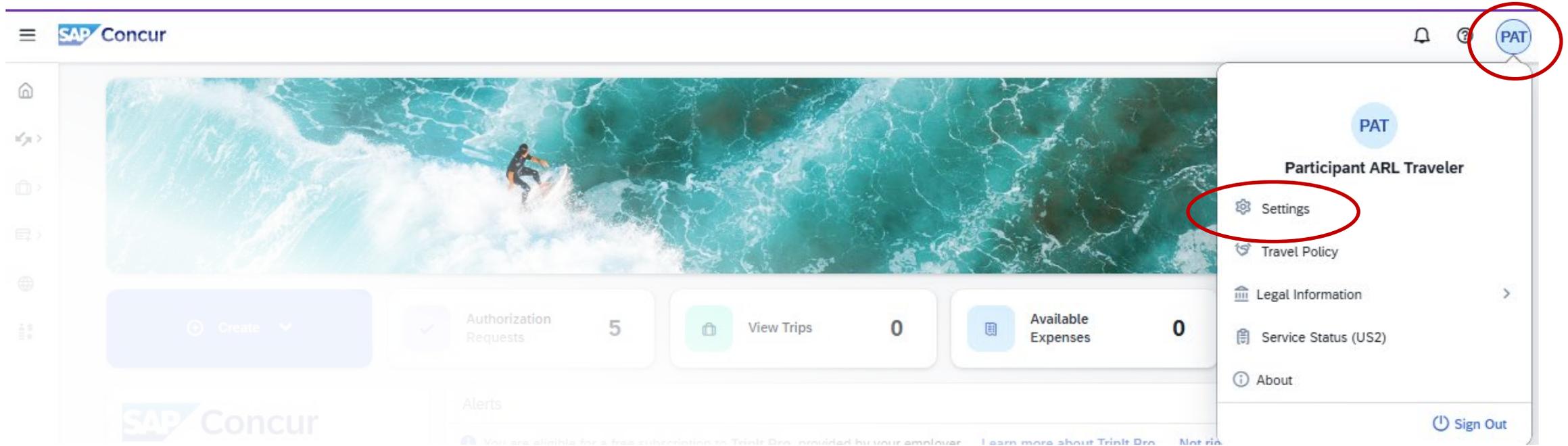
10 | 1 to 3 of 3

[Concur Travel Dashboard](#)

Click to access the Concur Travel module.

# Concur Profile Setup

Your Concur Home page will open. Click on the button in the top right corner and select *Settings* from the menu.



The screenshot shows the SAP Concur home page. The top navigation bar includes the SAP Concur logo on the left and a user profile icon labeled 'PAT' on the right. The main content area features a large banner image of a person surfing, a 'Create' button, and three summary cards: 'Authorization Requests' (5), 'View Trips' (0), and 'Available Expenses' (0). A dropdown menu is open from the 'PAT' icon, listing 'Settings', 'Travel Policy', 'Legal Information', 'Service Status (US2)', and 'About'. The 'Settings' option is circled in red. A 'Sign Out' button is located at the bottom right of the dropdown menu.

# Concur Profile Settings: Required Fields

Your profile information will enable you to book reservations using the Concur booking tool and will also enable the OMEGA World Travel (OWT) agents to complete travel arrangements on your behalf. If you are not requesting a hotel reservation through this request, you are not required to provide credit card information.

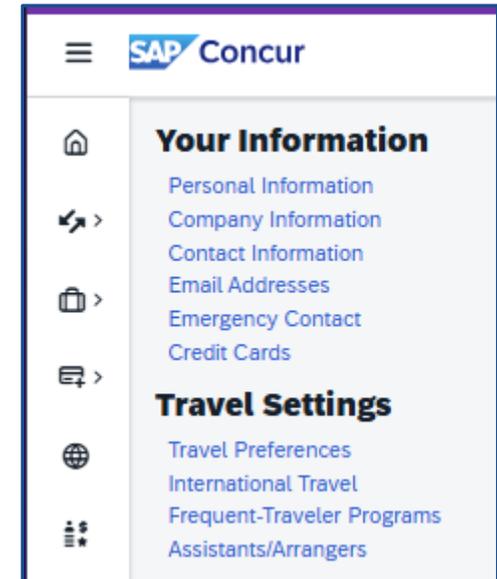
## Required Profile Information:

- Full legal name. Please verify that it matches your government issued ID
- Contact phone numbers
- Date of birth
- Gender
- TSA number, if you have one

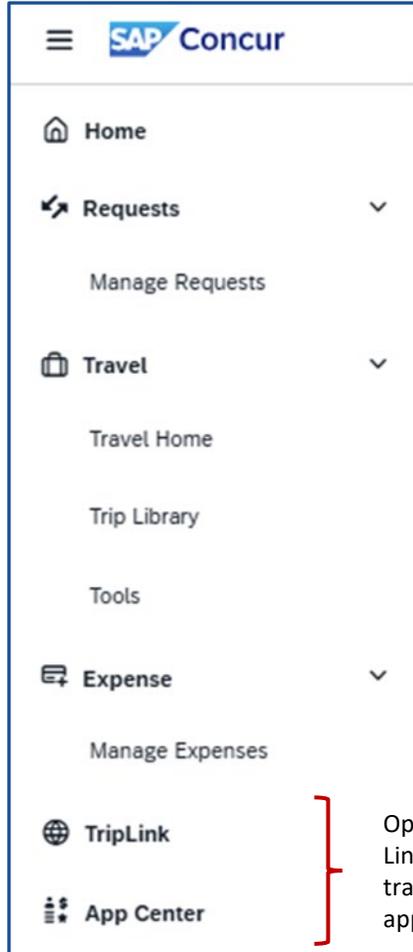
Required for hotel reservations booked through Concur OR booked by OWT:

- Credit card number

Enter the required information and other preferences as desired. Click SAVE at the end of each section edited. Next, choose *Home* (  ) from the sidebar menu.



# Concur Dashboard Features



The Home Page provides access to your activity within each travel process component. Use the side menu or the tabs shown below to create or manage travel activity.



The Company Notes section posts includes important reminders and time-sensitive notifications.

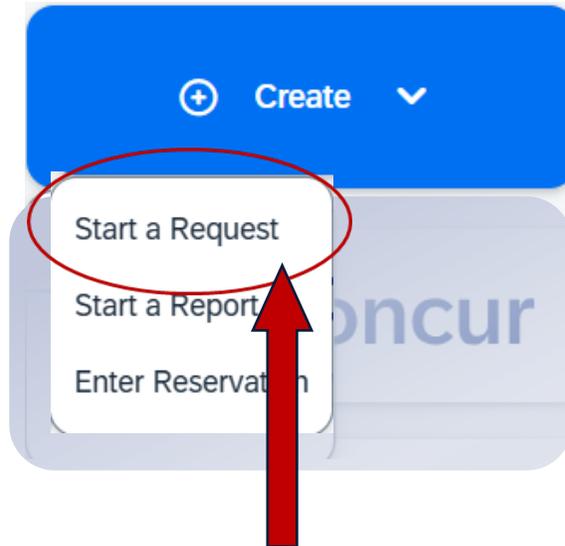
## Company Notes

**ORAU Travel and Expense Process Steps and Reminders**  
**\*\*Please Read these Important Reminders\*\***



The side menu can be condensed using the hamburger icon at the top of the list.

# Create a Travel Request



Click *Start a Request* on  
The drop-down menu.

Be prepared to include the following information in your request:

- A Business Purpose statement that briefly describes how the trip supports your research appointment
- Travel start and stop dates for business travel
- Travel dates for personal travel, if applicable
- Destination city and state name
- If attending a conference:
  - Conference name
  - Links to conference web site
  - Conference registration and/or presentation fees
- Method of travel
- Estimation of Costs – The Concur application can be used to find estimates for travel and lodging

# Request Header: Trip Information Fields (part 1)

**Create New Request**

Request Policy: Travel Request Policy

Request Name \*: ResearchConf\_Aug03-08\_Charlotte

Request/Trip Start Date \*: 08/03/2025

Request/Trip End Date \*: 08/08/2025

Are you attending a conference, training or seminar? \*: Yes

Booking Type \*: 1. On-Line in Concur

Main Destination Country: UNITED STATES (US)

Supplemental Request: Request ID

Trip Type \*: \*Domestic Travel

Main Destination City \*: Charlotte, North Carolina

Business Purpose \*: Presenting research results and meeting with collaborators at U of TX.

**Complete the Travel Request Header**

Fields with an \* are required

Scroll to complete all fields

**Booking Type Options** (Choose the type now. Actual booking will be completed AFTER the request is approved.)

- 1. On-line in Concur:** Use the Concur module to book at least one component of your trip. (Other components may be booked outside of Concur.)
- 2. Direct with Agency:** A representative from OWT will assist you to book your travel (i.e., transportation, lodging, rental car) Required for travel by train.
- 3. Other:** Make your own reservations. Travelers using this option will be responsible for ensuring selections meet travel guidelines.

# Request Header: Trip Information Fields (part 2)

The Project and Task fields will auto-populate.

The screenshot shows a web form for a request header. At the top, there are two dropdown menus: 'Project \*' (1) and 'Task \*' (2). The Project field is populated with '(201220372) RP-RS ARL-RAP AD...' and the Task field with '(0001) RP-RS A - Parent'. Below these are three more dropdown menus: 'Does this trip include personal travel days? \*' (set to 'No'), 'List Date Range for BUSINESS Travel Only in Date Format' (set to 'NA'), and 'Deviating from work airport OR driving > 350 miles one way?' (set to 'No'). There is a checkbox for 'Cost Comparison Acknowledgment' which is currently unchecked. A 'Quick Help' pop-up window is open, explaining that selecting the checkbox means you agree to obtain a valid cost comparison. At the bottom right, there are 'Cancel' and 'Create Request' buttons. The 'Create Request' button is circled in red.

If yes, the box below must be checked to indicate you understand the need for a cost comparison. Contact ORAU with questions.

When complete, click Create Request.

# Travel Expense Estimates

The screenshot shows the SAP Concur interface for a travel request. At the top left is the SAP Concur logo. Below it is the 'Manage Requests' section. The breadcrumb trail reads: Home / Requests / Manage Requests / ResearchConf\_Aug03-08\_Charlotte. A yellow alert banner indicates 'Alerts: 1'. The main heading is 'ResearchConf\_Aug03-08\_Charlotte', with subtext 'Sent Back to Employee | Request ID: 79K7 | View Timeline'. Below this are navigation links: Request Details, Print/Share, Attachments, and Manage Travel Allowance. At the bottom of the screenshot, the 'EXPECTED EXPENSES' section is visible, showing a callout box with the text 'No Expected Expenses' and instructions to add expenses for approval.

A travel request needs to identify the total cost for all estimated expenses, regardless who pays the cost up-front.

**No Expected Expenses**  
Add expected expenses and/or travel plans to this request to submit for approval.

# Travel Expense Estimates

- The *Travel* section of Concur can be used to review travel options and compare costs for the following common travel expenses:
  - Transportation from starting location to destination(s)
  - Lodging
  - Car Rental
- Other sources may be needed to determine estimated costs for expenses such as:
  - Parking
  - Conference registration / other conference fees
  - Taxi/Uber/Lyft, etc.
  - Train Fare
- Travel Allowance: Standardized costs for Meals & Incidentals are calculated by Concur

**IMPORTANT! DO NOT MAKE RESERVATIONS or BOOK TRAVEL AT THIS TIME!**

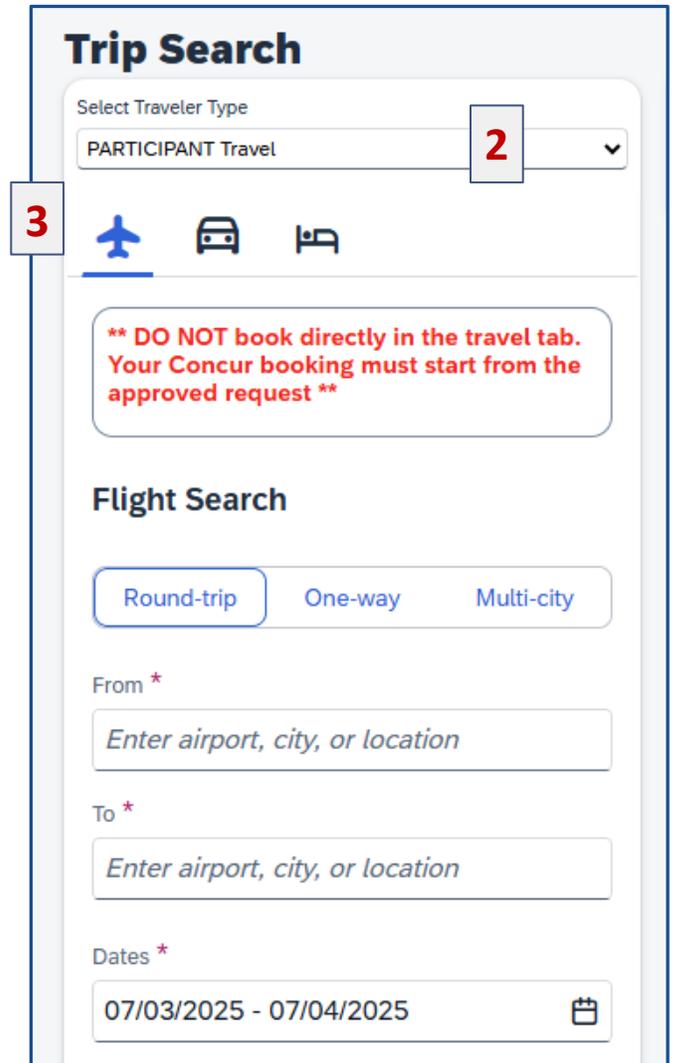
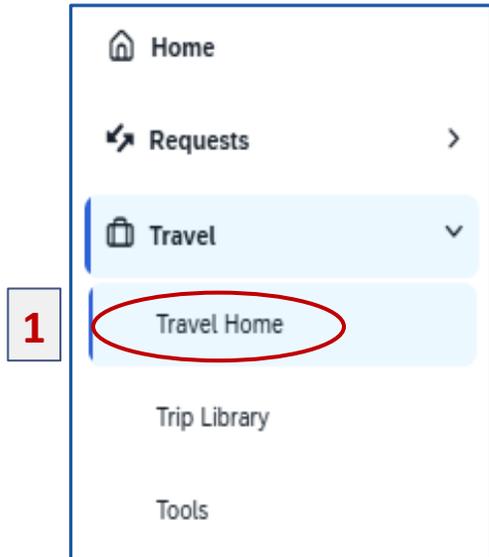
# Travel Expense Estimates

1 Use the drop-down menu to open the Travel tool within Concur.

2 Select the Traveler Type “PARTICIPANT Travel.”

3 To begin a search for your flight, transportation or lodging options, click the associated icon. Concur provides only options that meet government travel regulations for reimbursement.

*Note:* You will need to enter the flight numbers and costs for your preferred arrangements into the Estimated Expenses section of your request **after you exit** the Travel section. It is helpful to jot this information down or take a screenshot of it for easy reference.

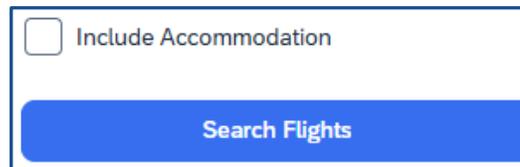


# Travel Expense Estimates: Airfare

To search for estimated flight costs:

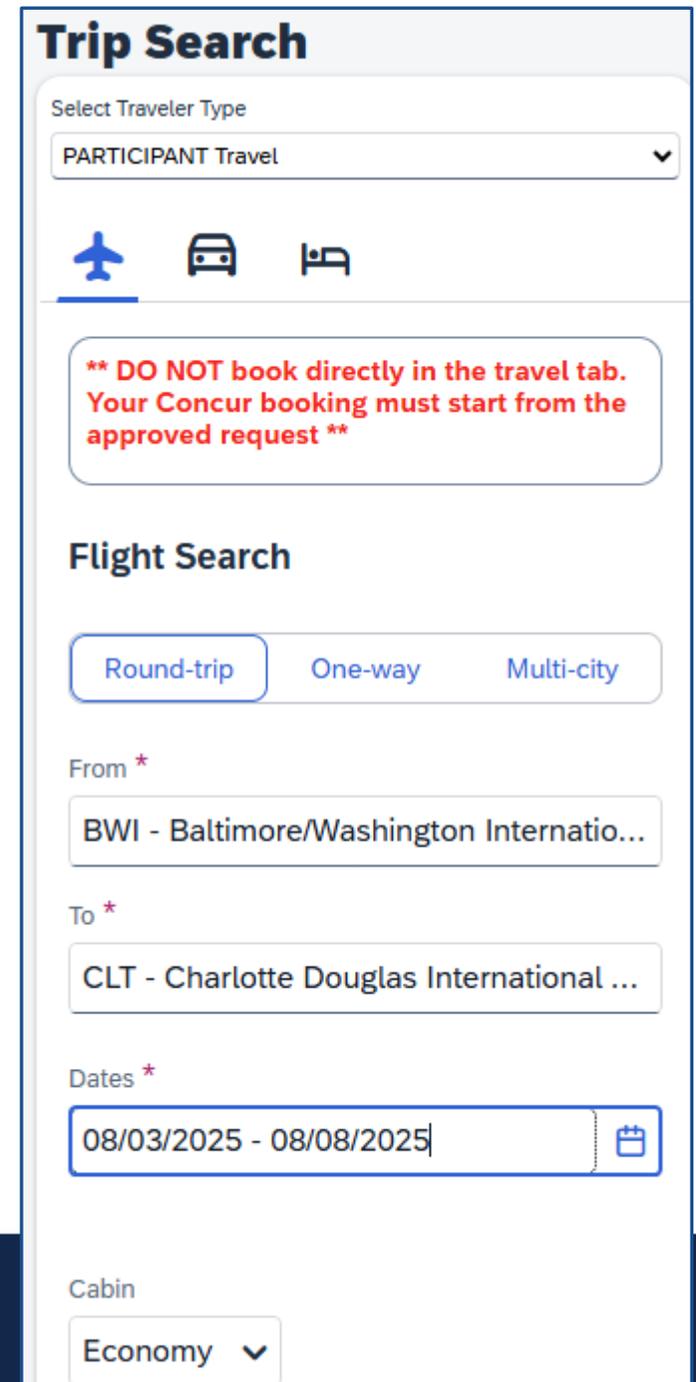
- Select Traveler Type: PARTICIPANT Travel
- Select the plane icon
- Choose Round-trip, One-way or Multi-city
- Enter your 'From' location and your 'To' location
- Enter the start and end travel dates
- Economy is the only cabin option
- Click Search Flights

DO NOT include an accommodation search with your flight estimate search. This feature is designed for the booking process.



Include Accommodation

**Search Flights**



### Trip Search

Select Traveler Type  
PARTICIPANT Travel

**\*\* DO NOT book directly in the travel tab. Your Concur booking must start from the approved request \*\***

### Flight Search

Round-trip One-way Multi-city

From \*  
BWI - Baltimore/Washington Internatio...

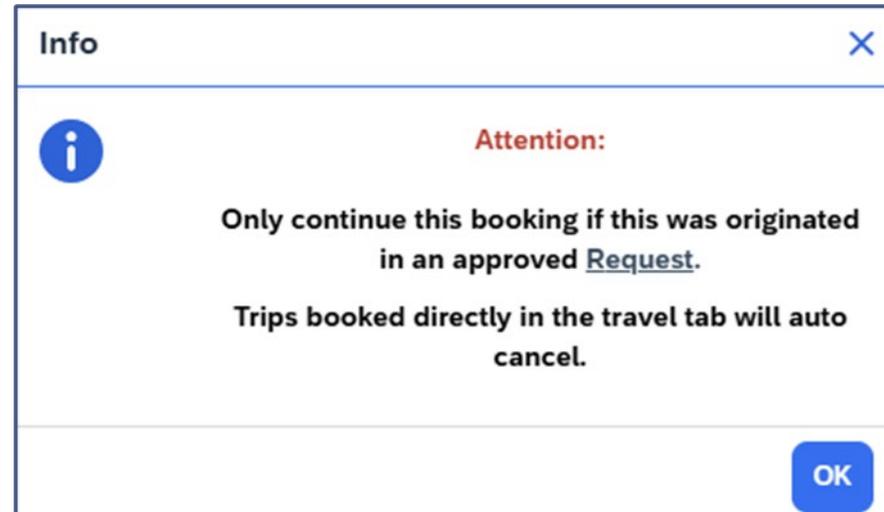
To \*  
CLT - Charlotte Douglas International ...

Dates \*  
08/03/2025 - 08/08/2025

Cabin  
Economy

# Travel Expense Estimates: Airfare

The following message will appear on this opening screen for each type of expense you research. You may click OK and continue to view fights. DO NOT book or make reservations while gathering estimates.



# Travel Expense Estimates: Air Fare

## Departing Flight

**Baltimore (BWI) - Charlotte (CLT)** Departure Date: Sunday, August 3, 2025 [Edit Search](#)

[All Filters](#)  [Matrix](#) [Number of Stops](#) [Carriers](#) [Time](#) [Flexibility](#)  
[Policy](#) [Class of Service \(4\)](#) [Clear All](#)

94 of 94 Flights

Round-trip fares include tax

### Best flights for you ?



**1:40 PM - 3:10 PM**

BWI - CLT • No

[Recommend](#)

**Least Cost Logical** [X](#)

Your company recommends this option. It's the lowest priced fare in Economy class that meets your travel needs.

Wanna Get Away Plus

Round-trip  
★ **\$215**

Business Select

Round-trip  
⚠ **\$435**

**Out of Policy** [X](#)

This option violates one or more of your company travel rules.

**Log For Reports**

Air Fare is greater than the least cost logical airfare plus 100 USD

Round-trip  
★ **\$215**  
[Select Fare](#)

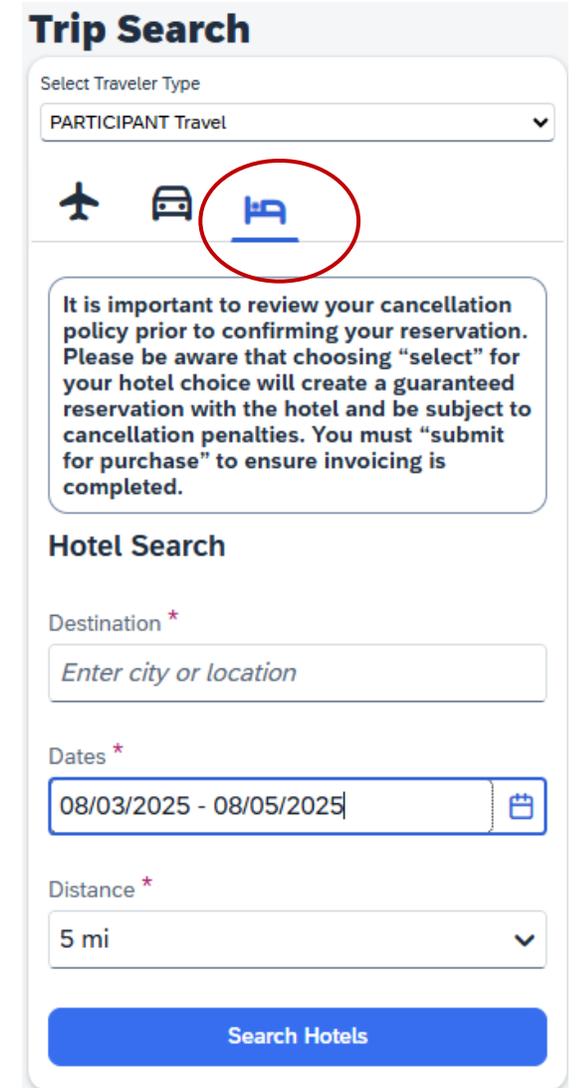
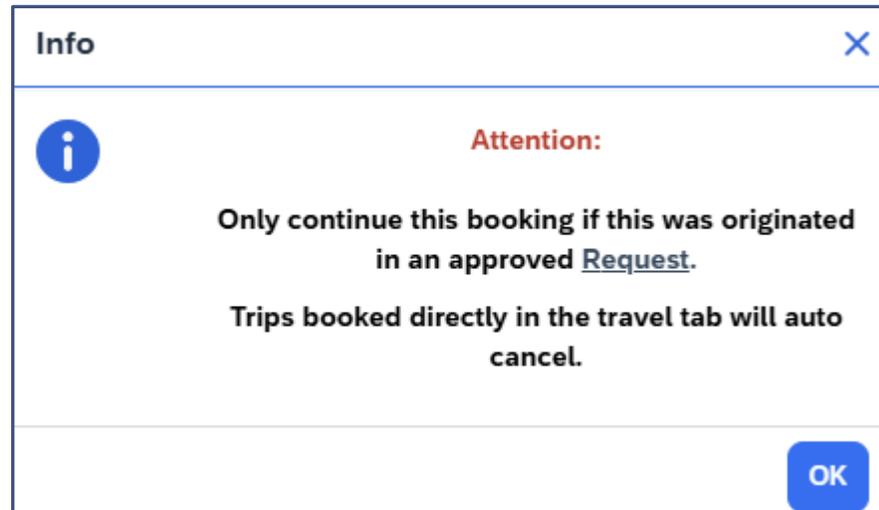
- Several filters can be applied
- Note any icons next to prices
- Click on the row for a flight to see details.
- Click Select Fare to view return flight options

**DO NOT BOOK!**  
Note your desired flights and costs and return to the Travel Section home page.

# Travel Expense Estimates: Lodging

Lodging: Select PARTICIPANT Travel and click on the bed icon. Next, enter your search criteria and click on the Search Hotels button.

The message below will appear on this opening screen. You may click OK and continue to research hotel costs. DO NOT make hotel reservations at this time.



# Travel Expense Estimates: Lodging

Reminder: If GSA rate at hotel is available, you must give justification as to why that rate was not chosen, or if another hotel was chosen at a higher rate. It is important to review your cancellation policy prior to confirming your reservation. Please be aware that choosing “select” for your hotel choice will create a guaranteed reservation with the hotel and be subject to cancellation penalties. You must “submit for purchase” to ensure invoicing is completed.

ORAU Negotiated Rates may not be available for every date requested.



**Tru By Hilton Charlotte Tyvola I-77**  
6125 Nations Ford Road, Charlotte, NC 28217 • 5.00 mi • 2-Star Hotel

- Complimentary breakfast
- Free parking
- Health club
- High speed internet access
- High speed wireless
- Parking
- Restaurant

Sustainable Property Safety Score: 69 Sustainability Score: 73 25.8KG CO<sub>2</sub>e

Per diem lodging limits Aug 03 - Aug 05, \$131

From: **\$126**  
\$305 Total  
Includes taxes and fees

[View Rooms](#)

**Per diem lodging limits**  
Aug 03 - Aug 05, \$131, Meals rate: \$75, Incidentals rate: \$5

Lodging per diem limits can be reviewed by clicking the View Rooms button for each hotel.

**DO NOT BOOK! Note your preferred hotel and the cost, then return to the Travel Section home page.**

# Travel Expense Estimates: Car Rental

To search for car rental options:

- On the Travel home page, enter the Traveler Type “Participant Traveler”
- Enter the Pickup and Drop-Off dates and times
- Click Search Rental Cars

The message below will appear on this opening screen. You may click OK and continue to research hotel costs. DO NOT make rental car reservations at this time.

Info ✕

**Attention:**

Only continue this booking if this was originated in an approved [Request](#).

Trips booked directly in the travel tab will auto cancel.

OK

### Trip Search

Select Traveler Type

PARTICIPANT Travel ▼

**National Emerald Club Members should always book an Intermediate size car. When picking up the car you will be able to choose any car from the Emerald Aisle selections.**

### Rental Car Search

Pickup \*  
Charlotte Douglas International Airport

Drop-Off  
Same Location

Dates \*  
08/03/2025 - 08/08/2025 

Pickup Time \*  
2:00 PM 

Drop-Off Time \*  
10:00 AM 

**Search Rental Cars**

# Travel Expense Estimates: Car Rental

**Rental Cars** [Skip Search](#)

**Charlotte Douglas International Airport** August 3, 2025 - August 8, 2025 [Edit Search](#)

Please Note: The purchase of car rental insurance is not an allowable cost. National/Enterprise rates include CDW and Liability coverage. Please only book an alternate vendor if National and/or Enterprise are not available.

[All Filters](#) [Category](#) [Rental Company](#)  Closest Locations Only [Sort by Category](#)

1 results All rates include taxes and fees



**Compact** NISSAN VERSA or similar [?](#)

5 seats 1 bag Automatic Unlimited Mileage

Air Conditioning

 Pickup and Drop-off: 0.48 mi [Location details](#)

[Corporate Rate](#) [Most Preferred](#) [110 kg CO<sub>2</sub>e](#)

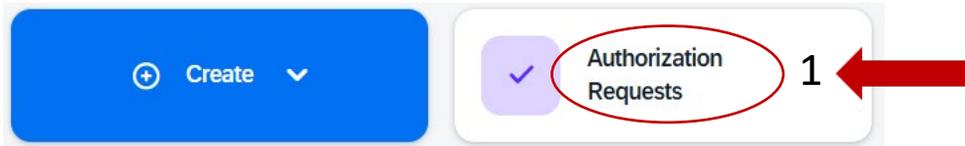
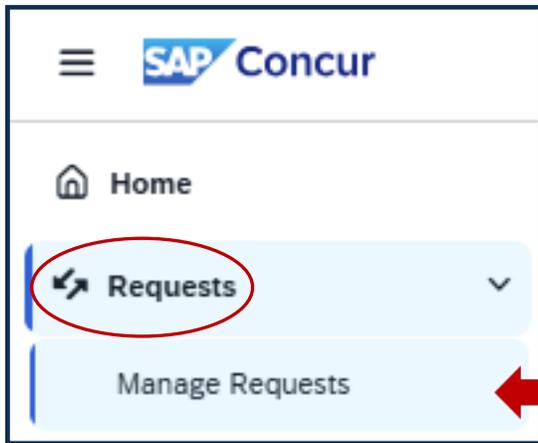
[Select](#)

- If an oversized vehicle is required for the purpose of the trip, a justification statement should be added when you add this expense to the request.
- In general, no additional rental car services or features are reimbursable. Travelers may purchase at their own cost.

**DO NOT BOOK! Note the cost and return to the Travel Section home page to search for other estimates or open the Request Section to add the estimated expenses to the request.**

# Add Expected Trip Expenses to a Request

Use either of these links to access your newly created request.



Select the request block to open it and add your expected expenses.



# Add Expected Trip Expenses: Travel Allowance

## ResearchConf\_Aug03-08\_Charlotte

Submit Request

Copy Request

Delete Request

Sent Back to Employee | Request ID: 79K7 | [View Timeline](#)

[Request Details](#) ▾

[Print/Share](#) ▾

[Attachments](#) ▾

[Manage Travel Allowance](#) ▾

### EXPECTED EXPENSES

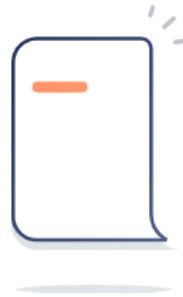
Add Travel Allowance

+ Add

Edit

Delete

Allocate



### No Expected Expenses

Add expected expenses and/or travel plans to this request to submit for approval.

**Travel Allowance** is the GSA calculated amount that may be used towards meals, incidental costs and lodging.

**Meals and incidental** amounts are reimbursed at .75% on the first and last days of the trip and at 100% for the days in between. (Receipts are not required.)

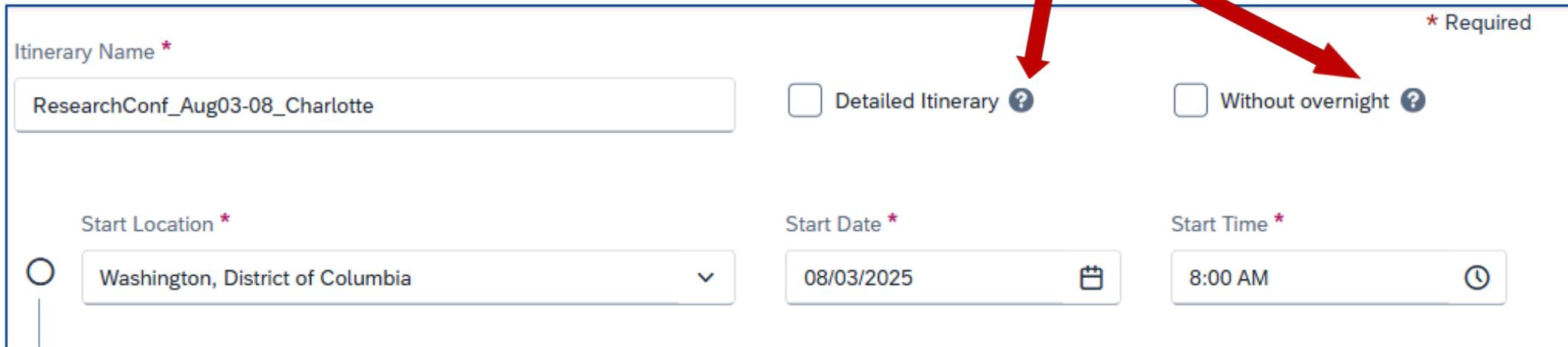
**Lodging** per diem indicates a maximum per night rate and is reimbursed based on actual costs. Receipts are required, showing each nightly charge for room rate and for taxes.

# Add Expected Trip Expenses: Travel Allowance

Enter the requested itinerary information.

- If you are NOT staying overnight, select the *Without Overnight* checkbox.
- If you have an overnight flight or an international flight, check the *Detailed Itinerary* box.

The Quick Help pop-ups provide detail.



The screenshot shows a form for adding expected trip expenses. It includes the following fields and options:

- Itinerary Name \***: A text input field containing "ResearchConf\_Aug03-08\_Charlotte".
- Detailed Itinerary ?**: A checkbox that is currently unchecked. A red arrow points to the help icon.
- Without overnight ?**: A checkbox that is currently unchecked. A red arrow points to the help icon.
- Start Location \***: A dropdown menu with "Washington, District of Columbia" selected.
- Start Date \***: A date input field containing "08/03/2025".
- Start Time \***: A time input field containing "8:00 AM".

A red asterisk and the word "Required" are located in the top right corner of the form area.

(Continues on next slide.)

# Add Expected Trip Expenses: Travel Allowance

Note:

- If your trip includes overnight stays at multiple locations, select *Add Destination* after each appropriate *Start Location*.

The screenshot shows a form for adding a destination. It features a vertical scroll bar on the left. At the top, there is a blue '+ Add Destination' button. Below it is the 'Arrival Location \*' field, which is a dropdown menu currently showing 'Charlotte, North Carolina'. Another blue '+ Add Destination' button is located below the arrival location field. At the bottom of the form, there are three fields: 'End Location \*' (dropdown showing 'Washington, District of Columbia'), 'End Date \*' (calendar icon, showing '08/08/2025'), and 'End Time \*' (clock icon, showing 'h:mm A').

Select *Next* to open the *Travel Allowance Adjustment* screen.

Next: Adjust your travel allowance

**Next**

Cancel

# Add Expected Travel Expenses: Adjust Travel Allowance

Use the check boxes to indicate when meals are known to be provided for you. (These can be adjusted on the expense report following the trip, if needed.) Use the *Exclude All Day* option if the full day is a personal day.

Date/Location	Exclude Day	Breakfast Provided	Lunch Provided	Dinner Provided	Percent Rule	Allowance Limit ?	Reimbursement Amount ?
All Days Dates: 6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
<b>Sun, 08/03/2025</b> Charlotte, UNITED STATES ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$262.00	\$60.00
<b>Mon, 08/04/2025</b> Charlotte, UNITED	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$262.00	\$80.00
						<b>Total: \$1,310.00</b>	<b>Total: \$440.00</b>

[Save](#) [Cancel](#)

(Continues on next slide.)

# Add Expected Travel Expenses: Adjust Travel Allowance

Location	Exclude Day	Breakfast Provided	Lunch Provided	Dinner Provided	Percent Rule	Allowance Limit ?	Reimbursement Amount ?
				<input type="checkbox"/>	<input checked="" type="checkbox"/>		
				<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$262.00	\$60.00
				<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$262.00	\$80.00
<b>Total:</b>						<b>\$1,310.00</b>	<b>\$440.00</b>

Click **Finish** or **Save** to continue. An expense line for Travel Allowance will populate into the Expected Expenses screen. The line can be expanded to see details for each day.

# Add Remaining Expected Travel Expenses

EXPECTED EXPENSES					
<input type="checkbox"/>	Expense type↓↑	Details↓↑	Date↑⇅	Amount↓↑	Requested↓↑
<input type="checkbox"/>	Travel Allowances	Charlotte, North Carolina	08/03/2025 - 08/08/2025	\$440.00	\$440.00



Click the **Add** button to access a list of reimbursable expense options. At a *minimum*, your request should identify estimates (or indicate they are not needed) for the following items in addition to your travel allowance:

- **Transportation** to/from starting location to destination: i.e., airfare, rail tickets, transportation to/from airports, railway stations.
- **Lodging** (whether there will be a charge or not)
- **Transportation from lodging to event.** Note: transportation for meals or personal activities is not allowable

Conference expenses are described on the next slide.

Add expected expenses and/or travel plans

Search by expense type, category, description

- 01. Travel Expenses
  - Hotel Reservation
  - Lodging-No Charge \$0 Only
- 02. Transportation
  - Air Ticket
  - Airline Fees
  - Car Rental
  - Ground Transportation
  - Parking
  - Railway Ticket
  - Rental Vehicle Gas
  - Rideshare/Taxi
- 03. Mileage
- 07. Other
  - Abstract Submission Fees
  - Conference Registration/Seminar/Course fees
  - Other
  - Personal Professional Development

# Add Remaining Expected Travel Expenses

## Conference Registration and Associated Conference Costs

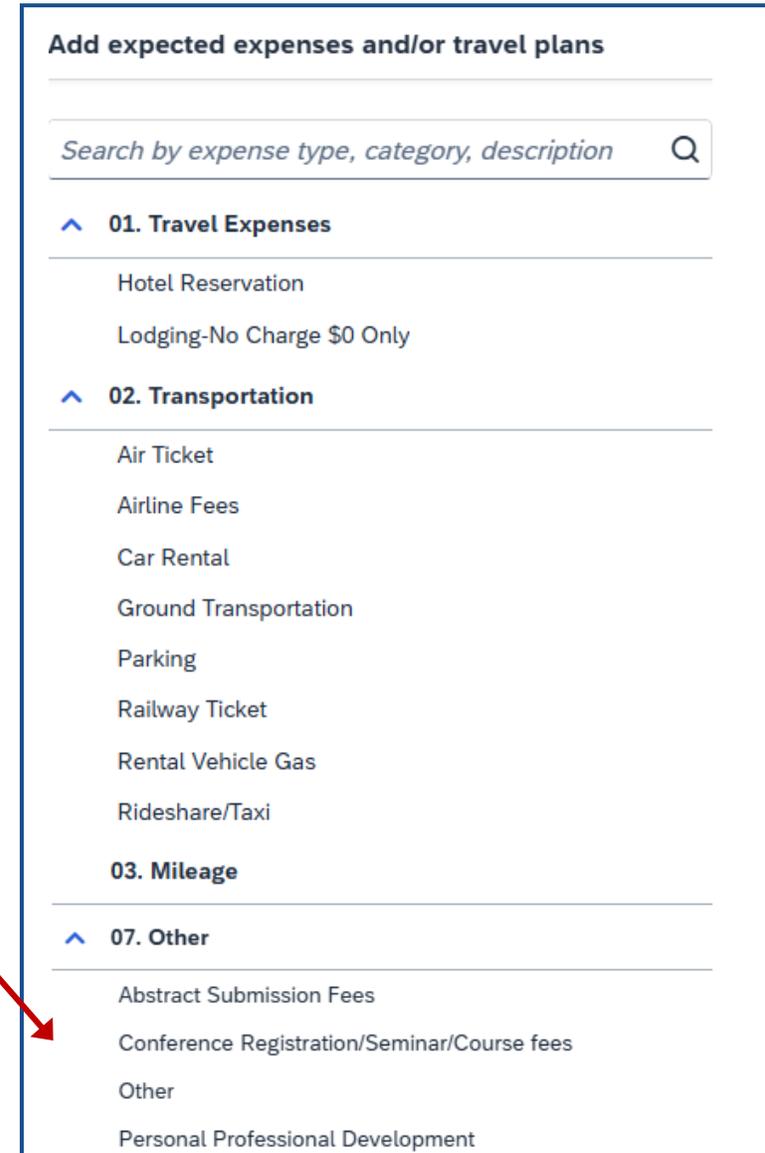
A registration fee is the only conference cost that will be included on the Travel request. Other costs related to conference attendance are considered non-travel and should be submitted on a separate request using the Non-travel policy. Examples include publication fees or membership fees paid to reduce registration costs.

For conference registration fees, scroll to section *07. Other*.

When all anticipated costs are listed, Click *Submit Request* to initiate the approval process. You will be notified when your request is fully approved.



**NOTE!** Conference attendance and conference presentations are subject to additional program approvals. Please work with your advisor and allow extra time for these actions.



# Track Approval Status

Travelers may review the status of their request as it moves through the approval queue. From within the request, choose Request Timeline from the Request Details menu. The Approval Flow will open and indicate where the request is within the approval process.

