

University of Houston Concur Instructions

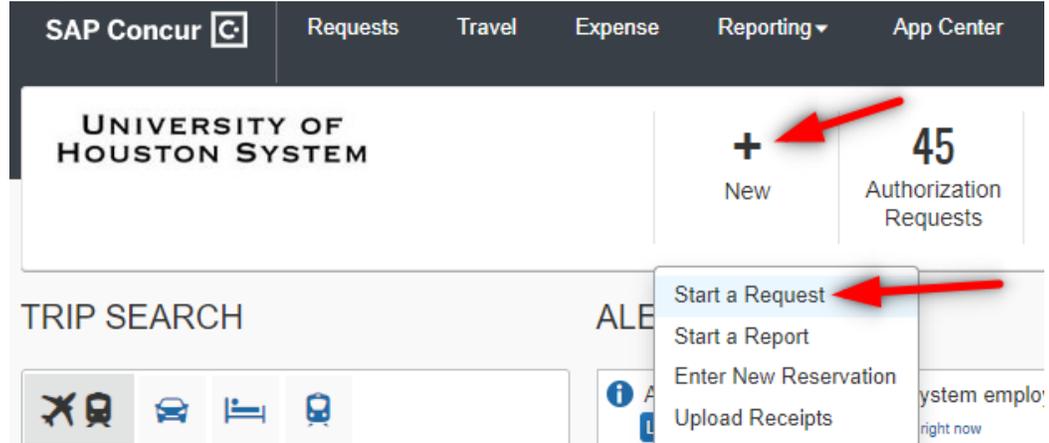
Creating a Travel Request

Step 1: Go to the Request page and select “New Request”.

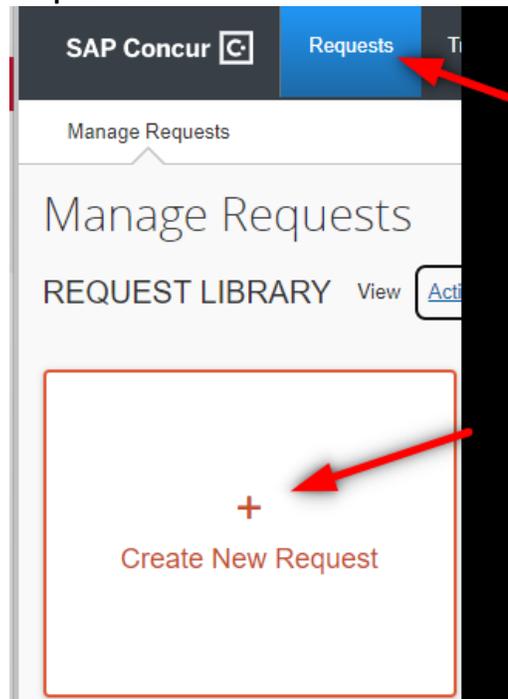
To go to the Request page, you can:

- (1) Click on + New, then select “Start a Request” (See Snapshot #1); or
- (2) Click on “Requests”, then click on “New Request” (See Snapshot #2)

Snapshot #1



Snapshot #2



University of Houston Concur Instructions

Creating a Travel Request

Step 2: Complete the information in the Request Header (all fields with a red asterisk * are required) then click Create Request

Create New Request

Document ID *

Primary Purpose of Travel *

Traveler Type

Travel Type *

Request Policy

Travel Start Date *

Travel End Date *

Purpose/Benefit *

Duration (Days)

Number of Personal Days *

Foreign Travel for Employee/Prospective Employee *

Is a state fund cost center used on this trip? *

Destination City 1 *

Cancel

Document ID

Enter the travel information in the following format:

Traveler Last Name, Traveler First Name initial Destination City Departure Date (MMDDYY)

You can enter up to 30 characters in this field.

Primary Purpose of Travel

Select the primary purpose of the travel from the dropdown box. The dropdown box lists the following purposes:

- Conference, workshop, training
- Contracted services to UHS (paid a fee)
- Federal government meeting
- Househunting expenses
- Moving expenses (not househunting)
- Recruit employees
- Recruit students
- Research
- State government meeting
- Student field trip
- Study abroad trip
- Team competition
- Whatever is not listed above (describe in Comments)

University of Houston Concur Instructions

Creating a Travel Request

Traveler Type

This field is grayed out. Concur will automatically pull this information from the user profile.

Travel Type

Select the travel type from the dropdown

- Employee Travel in Texas (Not Student Recruiting)
- Employee Travel Outside TX, but Inside US, Canada, or Mexico
- Employee Travel Outside US, Canada, and Mexico
- Employee Travel to Recruit Students (All Destinations)
- New Employee Moving Expenses
- Participant Cost Travel
- Prospective Employee Travel
- Prospective Student Travel
- Regent Travel in Texas
- Regent Travel Outside Texas
- Student Field Trip in the US
- Student Study Abroad Travel
- Student Team Competition
- Student Travel (Not Field Trip, Study Abroad, Competition)

box:

- Travel for a Consultant (Paid a Fee)
- Travel for a Lecturer/Artist (Paid a Fee)
- Travel for Other Contractor (Paid a Fee)
- University Guest Travel (Not Paid a Fee)

Request Policy

This field is grayed out. It indicates that Travel Request is processed in compliance with the UH Request Policy.

Travel State Date and Travel End Date

Enter the departure date and return dates.

Purpose/Benefit

University of Houston Concur Instructions Creating a Travel Request

Enter the purpose/benefit of the trip.

Duration (Days)

You do not need to enter any value in this field. Once the request is saved, Concur computes the travel days and indicate it in this field.

Number of Personal Days

Enter the number of personal days planned for the trip. If none, enter "0" (zero).

Foreign Travel for Employee/Prospective Employee

Indicate whether the travel is to or from countries outside Canada, Mexico, the United States, and the U.S. territories and possessions for an employee or prospective employee.

Is a state fund cost center used on this trip?

Indicate whether state funds will be used for the trip.

Destination City 1 and Additional Destination Cities

Enter the destination city or cities. Multiple destinations can be indicated in the "Additional Destination Cities" using semi-colons (e.g., Paris; London, etc.)

Business Unit, Department, Fund Type, Fund Code, Program, Project, Grant Type, Chartfield1

Concur automatically pulls these fields from the traveler's profile, if a default cost center is entered in the profile. To change or enter a cost center, select each field in the order presented (Business Unit, Department, Fund Type, etc.).

Will any travel cost be paid by a non-UH third party?

Enter "Yes" or "No".

Name of non-UH third party

If "Yes" is selected for a non-UH third party payment, enter the name of the third party.

100% of travel cost paid by non-UH third party?

If "Yes" is selected for a non-UH third party payment, indicate whether 100% is paid by the third party. If 100% is paid by the third party, you do not need to provide additional information. If less than 100% is paid by the third party, you must attach a letter from the third party indicating the information about their payment.

Public Health Service (PHS) Grant

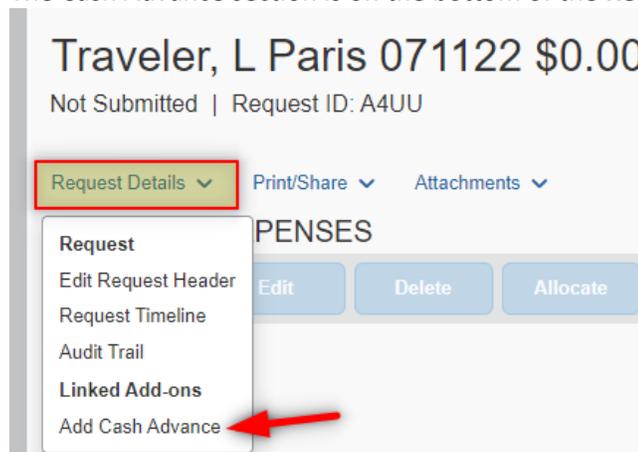
University of Houston Concur Instructions Creating a Travel Request

If “Yes” is selected for a non-UH third party payment, indicate the traveler’s association with a PHS grant. If the traveler’s salary was paid from a PHS grant and/or he/she is an investigator on the grant, Concur sends an e-mail notification to the Office of Research Policies, Compliance, and Committees, so ORPCC can follow up with the department later. ORPCC does not approve the Travel Request or delay the approval process.

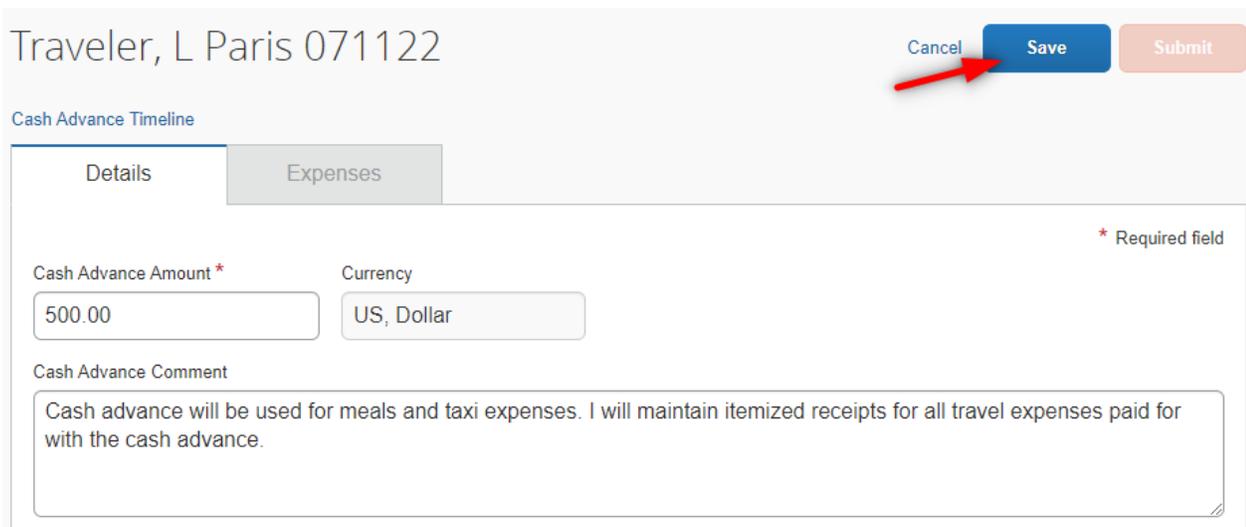
Step 3: If you are requesting a Travel Advance, complete the Cash Advance section.

Note: Travel Advances are available for employee foreign travel and group travel only. Only employees who are eligible for Travel Advances may receive Travel Advances.

The Cash Advance section is on the bottom of the **Request Details** segment > **Add Cash Advance**



Step 4: Enter the Cash Advance Amount and type in the comments stating what the cash advance will cover. Then click Save

A screenshot of the Concur "Cash Advance" form. At the top, it says "Traveler, L Paris 071122" and has buttons for "Cancel", "Save" (highlighted with a red arrow), and "Submit". Below is a "Cash Advance Timeline" section with two tabs: "Details" (selected) and "Expenses". The "Details" tab contains a form with the following fields: "Cash Advance Amount *" (with a red asterisk and a value of 500.00), "Currency" (with a value of US, Dollar), and "Cash Advance Comment" (with a text area containing the comment: "Cash advance will be used for meals and taxi expenses. I will maintain itemized receipts for all travel expenses paid for with the cash advance."). A red asterisk and the text "* Required field" are visible in the top right corner of the form area.

University of Houston Concur Instructions Creating a Travel Request

Step 5: Complete the information in the Expected Expenses page by Adding the expected expenses for your trip

EXPECTED EXPENSES						
<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Allocate"/>						
<input type="checkbox"/>	Alerts ↑↓	Expense type ≡	Details ↑↓	Date ↑↓	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>		Air Ticket	Houston (IAH) - Paris (CDG) : Round Trip	07/11/2022	\$750.00	\$750.00
<input type="checkbox"/>		Car Rental	Paris, FRANCE - Paris, FRANCE	07/11/2022	\$500.00	\$500.00
<input type="checkbox"/>		Dining		07/11/2022	\$400.00	\$400.00
<input type="checkbox"/>		Hotel Reservation	Paris, FRANCE	07/11/2022	\$800.00	\$800.00
<input type="checkbox"/>		Mileage		07/11/2022	\$50.00	\$50.00
<input type="checkbox"/>		Other Incidental Expenses	Conference Registration Fee	07/11/2022	\$700.00	\$700.00
					\$3,200.00	

Air Ticket

Enter the request amount, departure/arrival cities, and dates. Other fields are optional. Click on "Save".

New Expense: Air Ticket

Outbound

From * To *

Date * Depart at Comment

Return

Date * Depart at Comment

Amount * Currency *

Car Rental

Enter the request amount, pick-up/drop-off cities. Other fields are optional. Click on "Save".

University of Houston Concur Instructions

Creating a Travel Request

New Expense: Car Rental Cancel Save

* Required field

Pick-up

City * Date At

Detail

Drop-off

City * Date At

Detail

Comment

Amount * Currency *

Hotel Reservation

Enter the request amount and city. Other fields are optional. Click on "Save".

New Expense: Hotel Reservation Cancel Save

* Required field

Check-In

Date At City *

Detail

Check-Out

Date At

Comment

Amount * Currency *

University of Houston Concur Instructions

Creating a Travel Request

Dining (Travel Meals)

Enter the request amount. Other fields are optional. Click on "Save".

New Expense: Dining

Cancel Save

* Required field

Start

Date: At: Detail:

End

Date: At:

Comment:

Amount*: Currency*:

Mileage

Enter the amount and "Save". Other fields are optional.

New Expense: Mileage

Cancel Save

* Required field

Outbound

From Location: Date: At:

Detail:

Return

To Location: Date: At:

Detail:

Comment:

Amount*: Currency*:

University of Houston Concur Instructions

Creating a Travel Request

Other Incidental Expenses

Enter the request amount and expense detail. Other fields are optional. Click on “Save”. You should use this segment for registration, planned business meals, parking, rental car gasoline, and other incidental expenses. For registration, the conference name should be entered in the Details field.

The screenshot shows a 'New Expense' form with the following fields and values:

- Title:** New Expense: Other Incidental Expenses \$700.00
- Buttons:** Cancel, Save
- Allocate:** (icon)
- Transaction Date *:** 07/11/2022
- Description:** Conference Registration Fee
- Transaction Amount *:** 700.00
- Currency *:** US, Dollar
- Comment:** International Technology Conference

Step 6: Attach required documents if necessary.

Click on “Attachments” and select “Attach documents”.

The screenshot shows the travel request details for 'Traveler, L Paris 071122 \$3,200.00'. The status is 'Not Submitted' and the Request ID is 'A4UU'. There are three menu items: 'Request Details', 'Print/Share', and 'Attachments'. The 'Attachments' menu is highlighted with a red box, and a red arrow points to the 'Attach Documents' button that appears below it.

Click on “**Upload and Attach**” and select any documents from your file to attach.

The screenshot shows a dialog box titled 'Document Upload and Attach' with a close button (x) in the top right corner. The main area is light blue and contains a large red plus sign (+) with the text 'Upload and Attach' and '5MB limit per file' below it. A 'Close' button is located at the bottom right of the dialog.

Examples of documents to attach to the Travel Request:

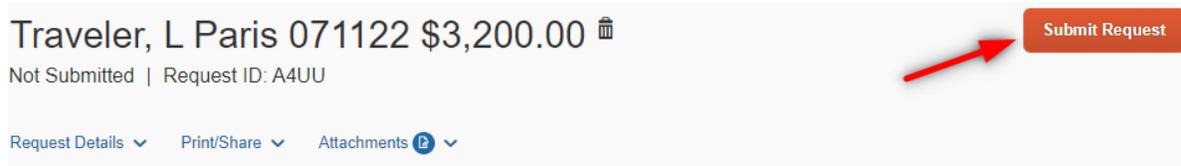
- Conference agenda
- Export Controls form for foreign travel
- Office of State-Federal Relations confirmation for travel to DC on state funds

University of Houston Concur Instructions

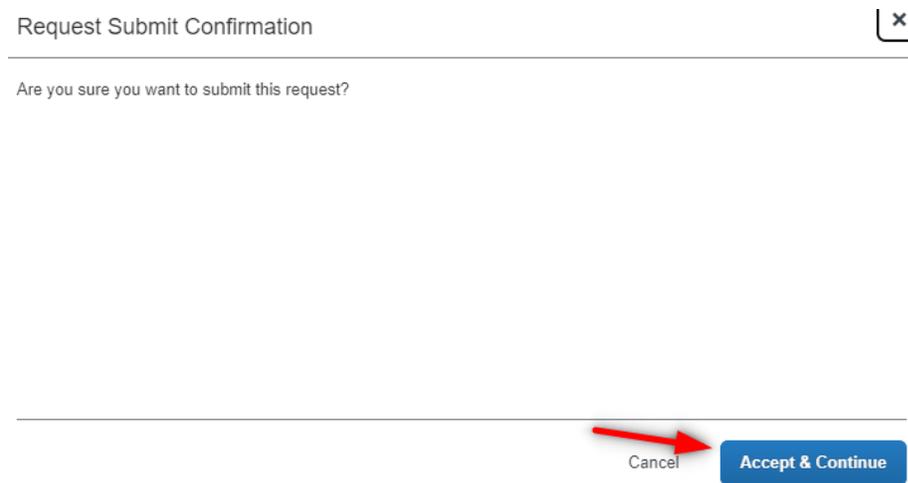
Creating a Travel Request

Step 7: Submit the request in workflow.

Click on "Submit Request".

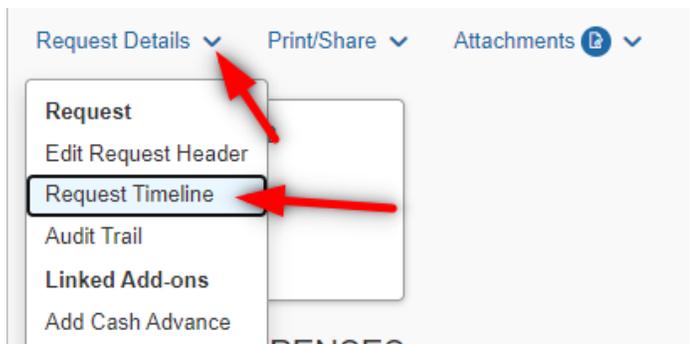


The system asks for your confirmation. Click on "Accept & Submit"



Step 8 (Optional): If you need to adjust the Approval Flow click on Request Details > Request Timeline

On Request Timeline click on Edit. From here you can then edit the Approval Flow > click Save



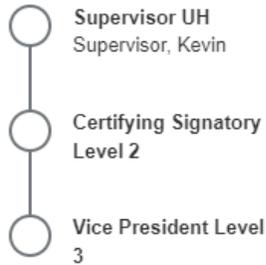
University of Houston Concur Instructions

Creating a Travel Request

Request Timeline

Traveler, L Paris 071122 | \$3,200.00

Approval Flow [Edit](#)



Request Summary

EXPENSE COMMENT Other Incidental Expenses | 07/11/2022 | \$700.00 [View](#)
Traveler, Linda 07/06/2022
International Technology Conference

[Add Comment](#)

Edit Approval Flow



Supervisor UH

Supervisor, Kevin

Certifying Signatory Level 2

▼ Search by Last Name

Vice President Level 3

▼ Search by Last Name

Cancel

Save