

University of Houston Concur Instructions

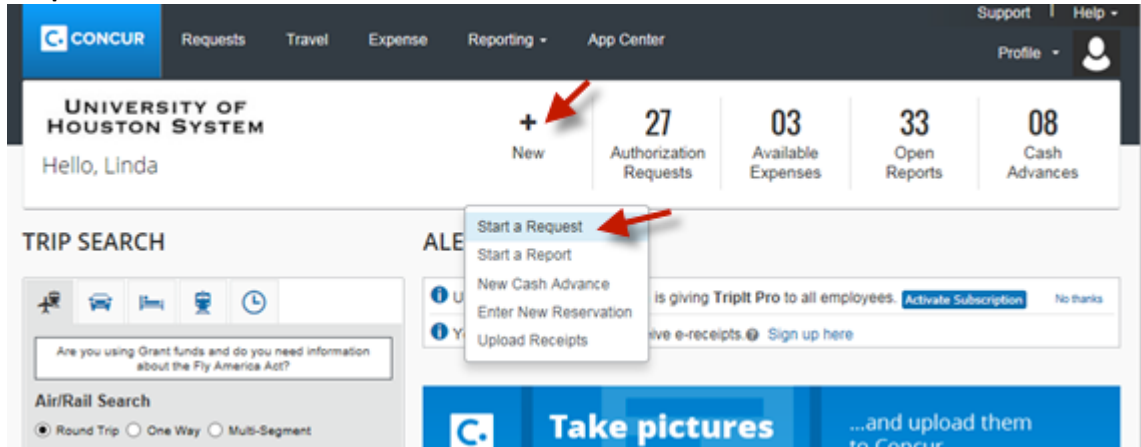
Creating a Travel Request

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

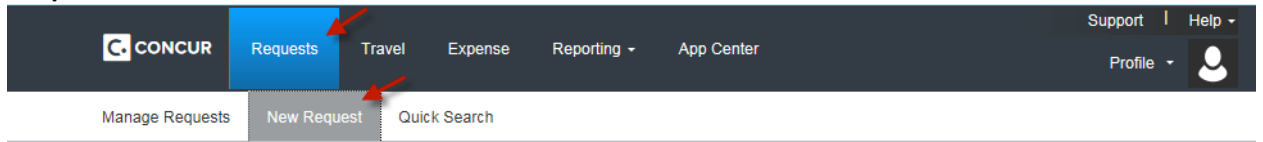
To go to the Request page, you can:

- (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)

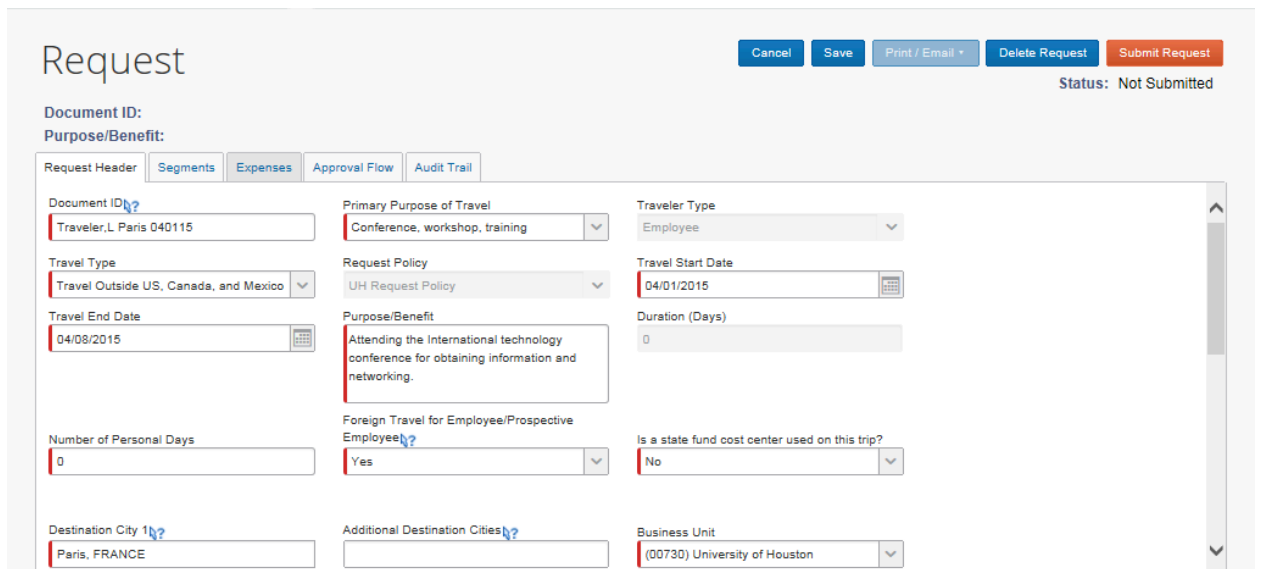
Snapshot #1



Snapshot #2



Step 2: Complete the information in the Request Header.

A screenshot of the 'Request' form in the Concur system. The 'Request Header' tab is selected. The form contains several fields: 'Document ID' (Traveler.L Paris 040115), 'Primary Purpose of Travel' (Conference, workshop, training), 'Traveler Type' (Employee), 'Travel Type' (Travel Outside US, Canada, and Mexico), 'Request Policy' (UH Request Policy), 'Travel Start Date' (04/01/2015), 'Travel End Date' (04/08/2015), 'Purpose/Benefit' (Attending the International technology conference for obtaining information and networking), 'Duration (Days)' (0), 'Number of Personal Days' (0), 'Foreign Travel for Employee/Prospective Employee?' (Yes), 'Is a state fund cost center used on this trip?' (No), 'Destination City 1' (Paris, FRANCE), 'Additional Destination Cities' (empty), and 'Business Unit' ((00730) University of Houston). At the top right, there are buttons for 'Cancel', 'Save', 'Print / Email', 'Delete Request', and 'Submit Request'. The status is 'Not Submitted'.

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The screenshot shows a web form for creating a travel request. It contains several dropdown menus and text input fields. The fields are: Department (H0156) H0156 FINANCE, Fund Type (LOCAL), Fund Code (2064) DESIG-TUITION, Program (ASSOC. VC/VP FINANCIAL OPERATI), Project (NA), Grant Type (NON-GRANT), Chartfield1 (DO NOT USE), Will any travel cost be paid by a non-UH third party? (No), Name of non-UH third party (empty text box), 100% of travel cost paid by non-UH third party? (empty dropdown), and Public Health Service (PHS) Grant (empty dropdown).

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)

Traveler Type

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

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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)
- 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

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).

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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

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.

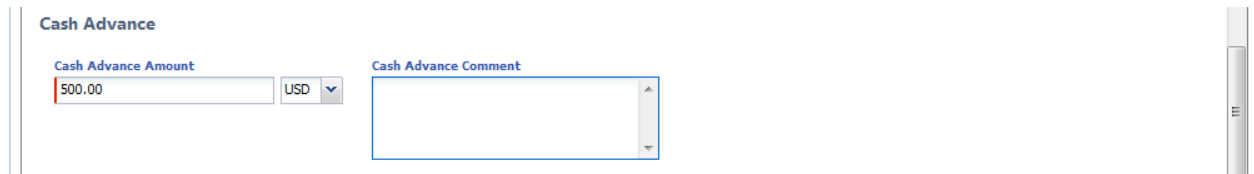
Step 3: If you are requesting a Travel Advance, complete the Cash Advance section.

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.

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The Cash Advance section is on the bottom of the Request Header page. Enter the amount.

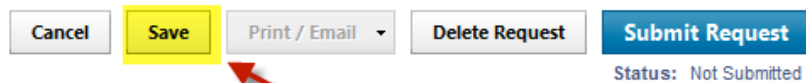


Cash Advance

Cash Advance Amount: 500.00 USD

Cash Advance Comment:

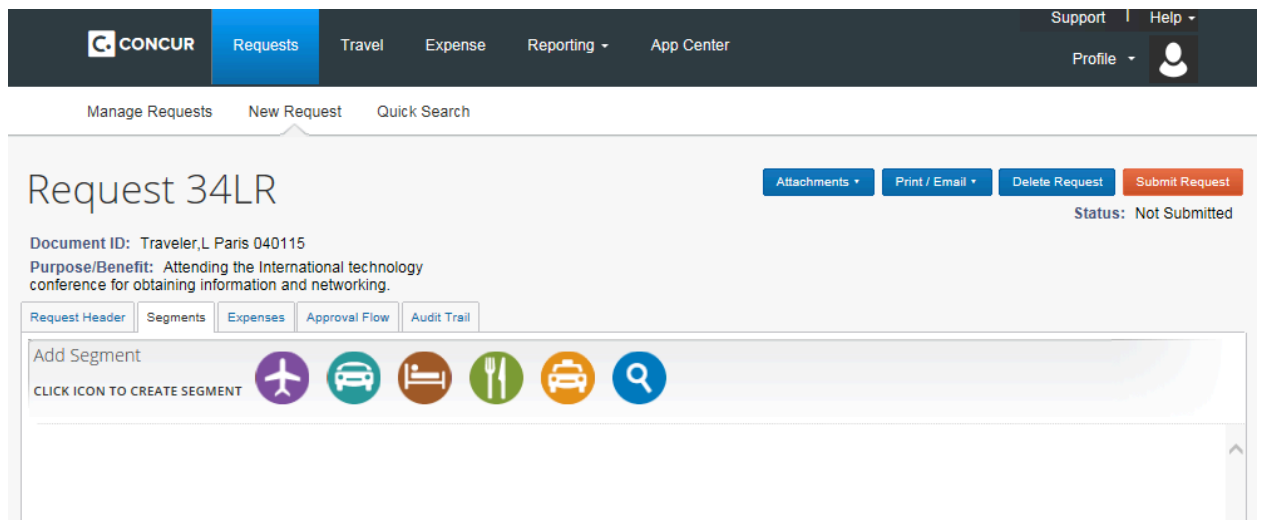
Step 4: Save the header information by clicking on “Save”.



Cancel Save Print / Email Delete Request Submit Request

Status: Not Submitted

Step 5: Complete the information in the Segments page.



CONCUR Requests Travel Expense Reporting App Center Support Help Profile

Manage Requests New Request Quick Search

Request 34LR Attachments Print / Email Delete Request Submit Request Status: Not Submitted

Document ID: Traveler,L Paris 040115
Purpose/Benefit: Attending the International technology conference for obtaining information and networking.

Request Header Segments Expenses Approval Flow Audit Trail

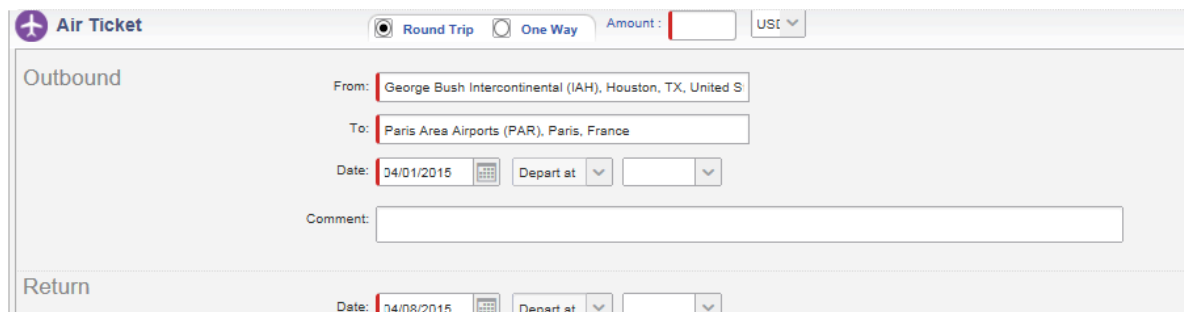
Add Segment
CLICK ICON TO CREATE SEGMENT

Icons: Airplane, Car, Hotel, Restaurant, Rental Car, Search

Click on an appropriate icon to complete the segment information.

Airfare

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



Air Ticket Round Trip One Way Amount: USD

Outbound

From: George Bush Intercontinental (IAH), Houston, TX, United S

To: Paris Area Airports (PAR), Paris, France

Date: 04/01/2015 Depart at

Comment:

Return

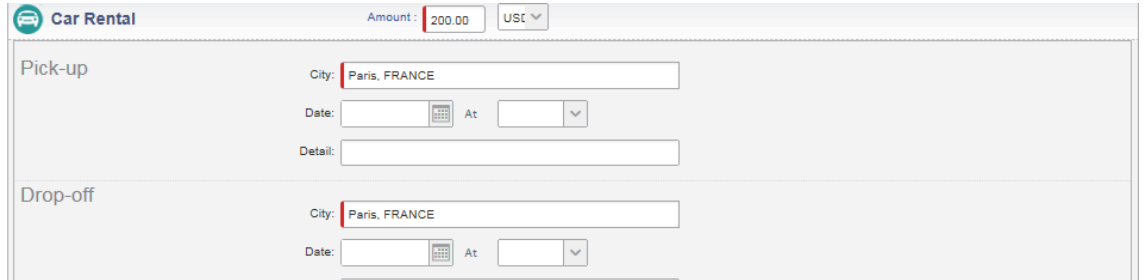
Date: 04/08/2015 Depart at

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Car Rental

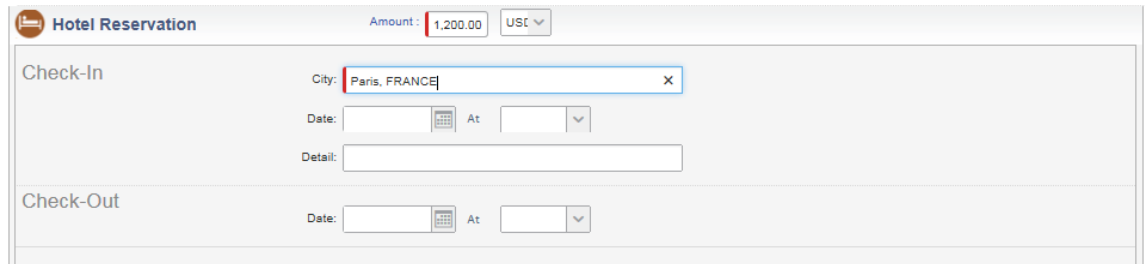
Enter the request amount, pick-up/drop-off cities. Other fields are optional. Click on "Save".



The screenshot shows the 'Car Rental' form in Concur. At the top, there is a header with a car icon, the text 'Car Rental', and a field for 'Amount' set to '200.00' with a currency dropdown set to 'USD'. Below this, the form is divided into two sections: 'Pick-up' and 'Drop-off'. Each section has a 'City' field with 'Paris, FRANCE' entered, a 'Date' field with a calendar icon, and an 'At' dropdown menu. There is also a 'Detail' text input field for each section.

Hotel Reservation

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

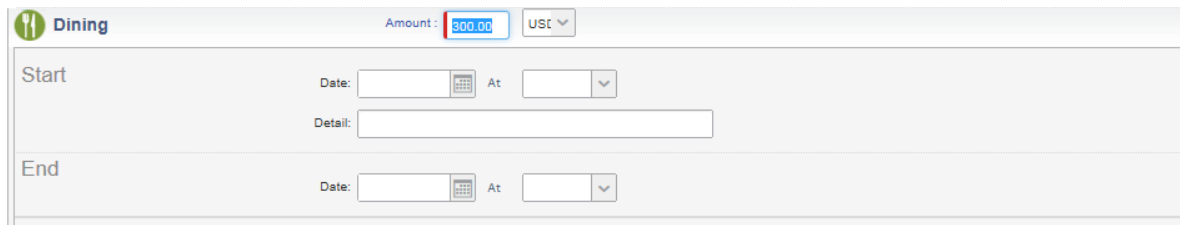


The screenshot shows the 'Hotel Reservation' form in Concur. At the top, there is a header with a hotel icon, the text 'Hotel Reservation', and a field for 'Amount' set to '1,200.00' with a currency dropdown set to 'USD'. Below this, the form is divided into two sections: 'Check-In' and 'Check-Out'. The 'Check-In' section has a 'City' field with 'Paris, FRANCE' entered and a close button (X), a 'Date' field with a calendar icon, and an 'At' dropdown menu. There is also a 'Detail' text input field. The 'Check-Out' section has a 'Date' field with a calendar icon and an 'At' dropdown menu.

Dining (Travel Meals)

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

You may create separate segments for travel meals and business meals.



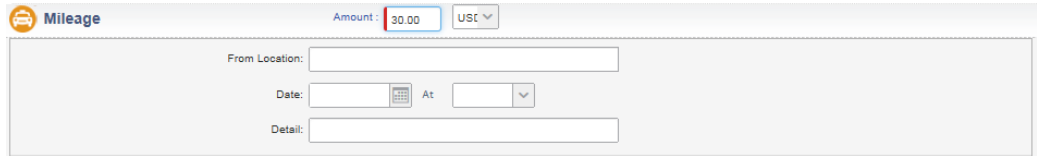
The screenshot shows the 'Dining' form in Concur. At the top, there is a header with a fork and knife icon, the text 'Dining', and a field for 'Amount' set to '800.00' with a currency dropdown set to 'USD'. Below this, the form is divided into two sections: 'Start' and 'End'. Each section has a 'Date' field with a calendar icon and an 'At' dropdown menu. There is also a 'Detail' text input field for the 'Start' section.

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Mileage

Enter the amount and “Save”. Other fields are optional.

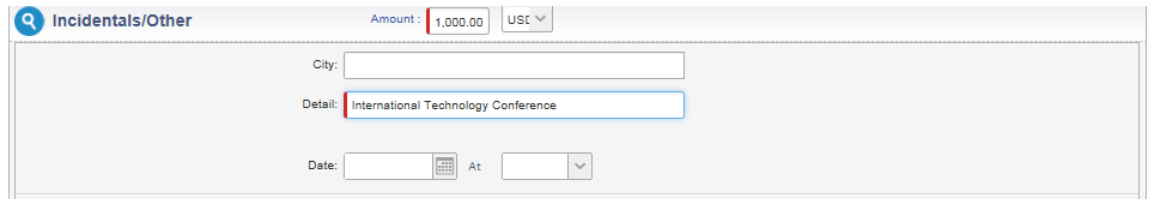


The screenshot shows the 'Mileage' form in Concur. At the top, there is a search icon, the title 'Mileage', and a currency dropdown set to 'USD'. Below this, the 'Amount' field is set to '30.00'. The form includes several optional fields: 'From Location' (text input), 'Date' (calendar icon), 'At' (dropdown menu), and 'Detail' (text input).

Incidentals/Other

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.



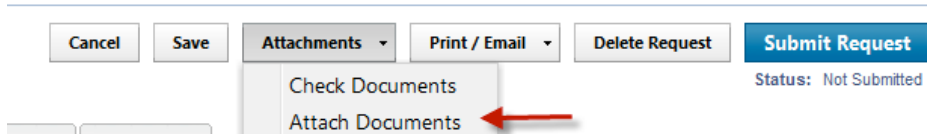
The screenshot shows the 'Incidentals/Other' form in Concur. At the top, there is a search icon, the title 'Incidentals/Other', and a currency dropdown set to 'USD'. Below this, the 'Amount' field is set to '1,000.00'. The form includes several optional fields: 'City' (text input), 'Detail' (text input with the value 'International Technology Conference'), and 'Date' (calendar icon) followed by 'At' (dropdown menu).

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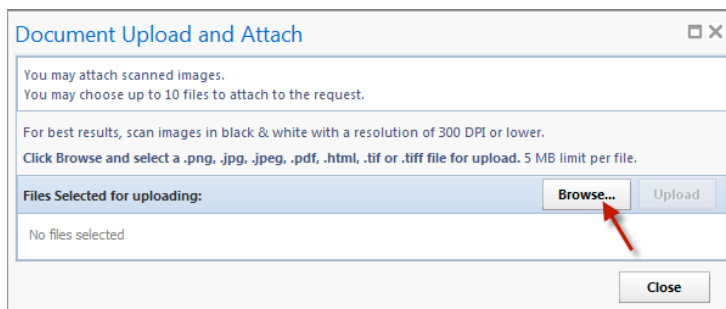
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Step 6: Attach required documents if necessary.

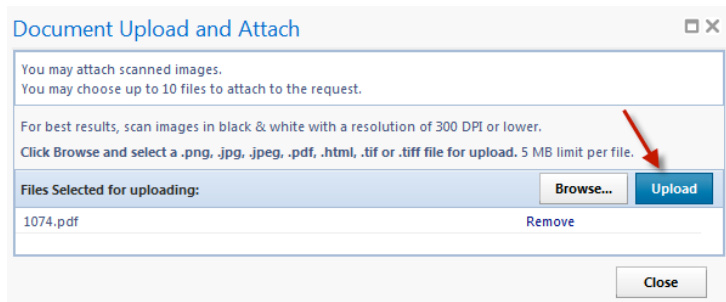
Click on “Attachments” and select “Attach documents”.



Click on “Browse” and select any documents from your file to attach.



Upload the document by clicking on “Upload”.

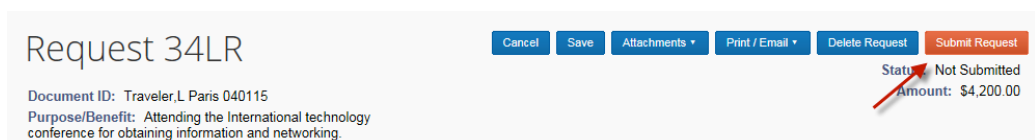


Examples of documents to attach to the Travel Request:

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

Step 7: Submit the request in workflow.

Click on “Submit Request”.



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

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Creating a Travel Request

Final Review



Request Submit Confirmation

Are you sure you want to submit this request?



Accept & Submit

Cancel
