

University of Houston Concur Instructions

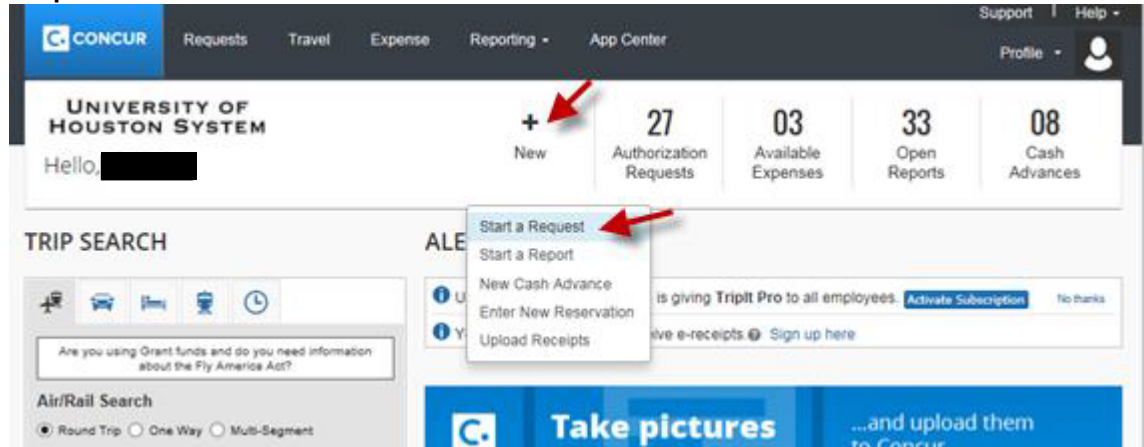
Creating a Travel Request

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

To go to the Request page, you can:

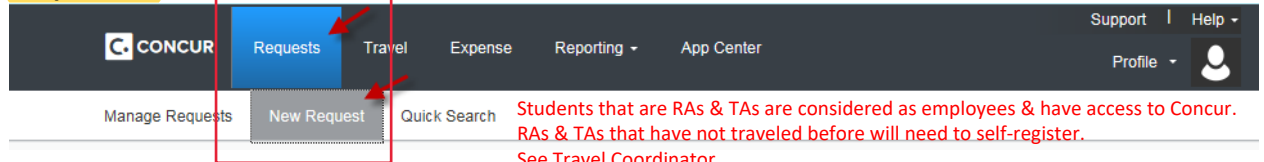
- (1) Click on + New, then select "Start a Request" (See Snapshot #1); or
- COSC** (2) Click on "Requests", then click on "New Request" (See Snapshot #2)

Snapshot #1



COSC

Snapshot #2



Students that are RAs & TAs are considered as employees & have access to Concur. RAs & TAs that have not traveled before will need to self-register. See Travel Coordinator.

NOTE: Students (not RAs & TAs) and Guests do not have access to Concur. Professor requesting travels should contact Travel Coordinator by email to create Concur travel account/travel request.

Step 2: Complete the information in the Request Header.

Hover over Document ID arrow. It will show you how to fill in. Information also shown below.

Request

Cancel Save Print / Email Delete Request Submit Request

Status: Not Submitted

Document ID: Traveler,L Paris 040115

Purpose/Benefit:

Request Header | Segments | Expenses | Approval Flow | Audit Trail

Document ID ?

Traveler,L Paris 040115

Travel Type

Travel Outside US, Canada, and Mexico

Travel End Date

04/08/2015

Number of Personal Days

0

Destination City 1 ?

Paris, FRANCE

Primary Purpose of Travel

Conference, workshop, training

Request Policy

UH Request Policy

Purpose/Benefit

Attending the International technology conference for obtaining information and networking.

Foreign Travel for Employee/Prospective Employee ?

Yes

Additional Destination Cities ?

Traveler Type

Employee

Travel Start Date

04/01/2015

Duration (Days)

0

Is a state fund cost center used on this trip?

No

X Business Unit

(00730) University of Houston

x Business Unit/Department/Fund Type/Fund Code/Program/Project/Grant Type/Chartfield is set to Cost Center default. Don't worry about changing this if you don't know what to use. Travel Coordinator will get proper cost center from supporting professor.

University of Houston Concur Instructions

Creating a Travel Request

The screenshot shows a web form for creating a travel request. It includes several dropdown menus with red 'X' icons indicating required fields:

- 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

Below these are three more dropdown menus:

- 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)

At the bottom, there is a dropdown menu for Public Health Service (PHS) Grants with a blue question mark icon.

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.

University of Houston Concur Instructions

Creating a Travel Request

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)

All of these need contracts submitted at least 3 weeks before services are to be performed.

box: **Requires Contract**

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) *Foreign National with contract will ensure Speaker is eligible for reimbursement and correct tax withholding, if any, is applied.

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 date.

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).
Travel Request will be forwarded to NSM Dean for additional approval if taking 3 personal days or more. Dean and Provost have authority to determine if you should receive 1/2 airfare reimbursement. However, if personal days are equal to or more than business days, see Domestic Travel Questions or Foreign Travel Questions.
Also view MAPP 04.02.01B

University of Houston Concur Instructions

Creating a Travel Request

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

Destination City means city where UH business will be held; not the city where you arrive if no UH business is held there.

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

If you do not know the cost center, don't worry about changing. Travel Coordinator will contact supporting professor for information.

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. *or email to Travel Coordinator*

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.

GO TO STEP 5 IF NO TRAVEL ADVANCE

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.

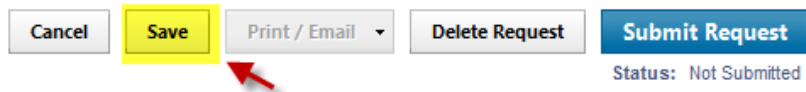
University of Houston Concur Instructions

Creating a Travel Request

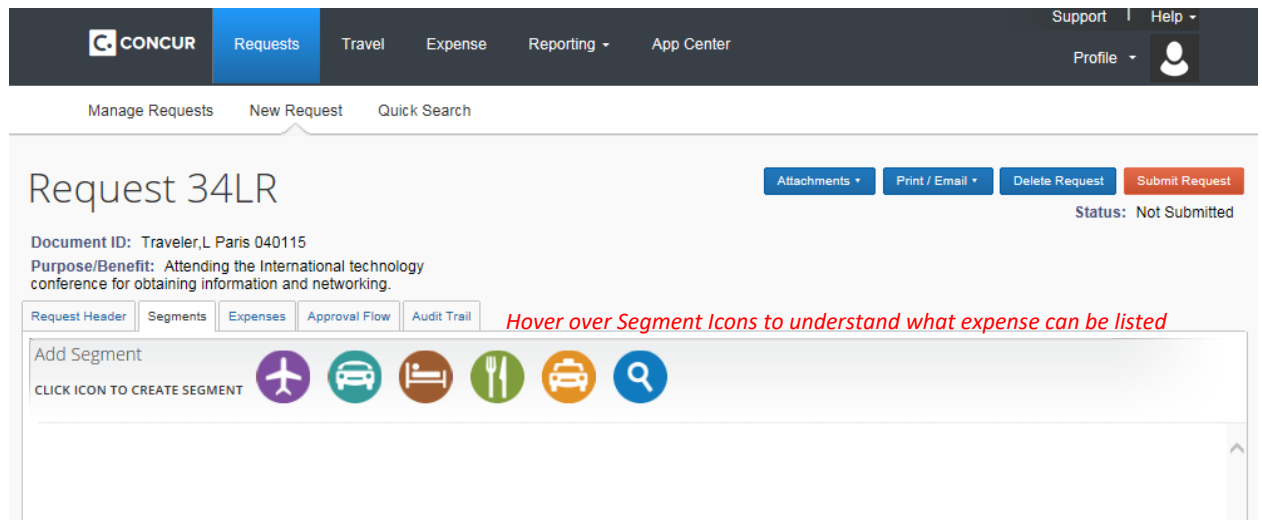
The Cash Advance section is on the bottom of the Request Header page. Enter the amount.



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



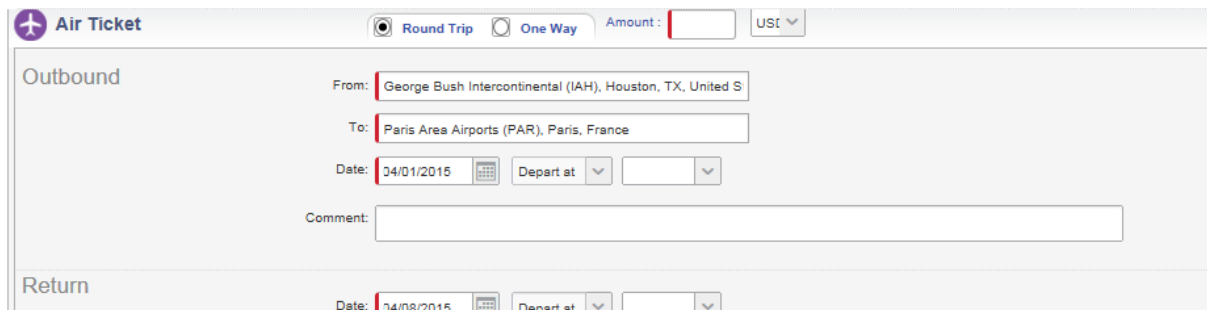
Step 5: Complete the information in the Segments page.



Click on an appropriate icon to complete the segment information.



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



University of Houston Concur Instructions

Creating a Travel Request

Car Rental



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

Car Rental Amount: 200.00 USD

Pick-up
City: Paris, FRANCE
Date: [Calendar] At: [Dropdown]
Detail: [Text Field]

Drop-off
City: Paris, FRANCE
Date: [Calendar] At: [Dropdown]

Hotel Reservation



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

Hotel Reservation Amount: 1,200.00 USD

Check-In
City: Paris, FRANCE
Date: [Calendar] At: [Dropdown]
Detail: [Text Field]

Check-Out
Date: [Calendar] At: [Dropdown]

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.

Dining Amount: 300.00 USD

Start
Date: [Calendar] At: [Dropdown]
Detail: [Text Field]

End
Date: [Calendar] At: [Dropdown]

University of Houston Concur Instructions

Creating a Travel Request

Mileage



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

The screenshot shows the 'Mileage' form in Concur. At the top, there is a header with a car icon, the word 'Mileage', and a currency dropdown set to 'USD'. Below this, there is a text input field for 'Amount' containing '30.00'. The main form area contains three optional fields: 'From Location:' with a text input, 'Date:' with a date picker and a time dropdown, and 'Detail:' with a 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, gasoline for rental car, taxis, and other incidentals. For registration, the conference name should be entered in the Details field.

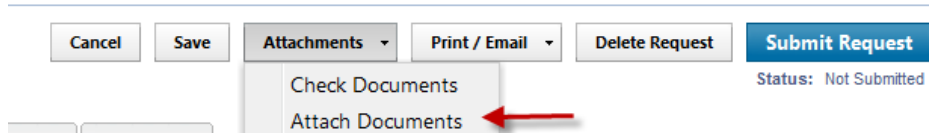
The screenshot shows the 'Incidentals/Other' form in Concur. At the top, there is a header with a magnifying glass icon, the text 'Incidentals/Other', and a currency dropdown set to 'USD'. Below this, there is a text input field for 'Amount' containing '1,000.00'. The main form area contains several fields and instructions. On the left, there is a red instruction: 'List whatever type incidental. If Registration, state "Registration" first before listing conference name.' In the center, there are three fields: 'City:' with a text input, 'Detail:' with a text input containing 'International Technology Conference', and 'Date:' with a date picker and a time dropdown. On the right, there is a red instruction: 'Examples: Registration, CPS 2020. /separate from other expenses'.

University of Houston Concur Instructions

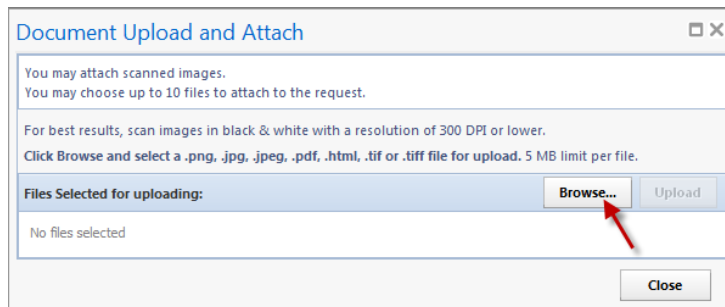
Creating a Travel Request

Step 6: Attach required documents if necessary.

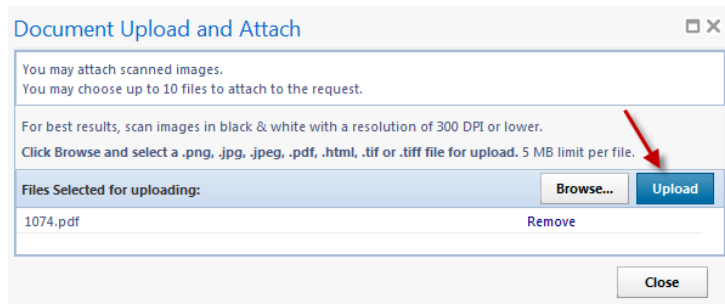
Click on “Attachments” and select “Attach documents”.



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:

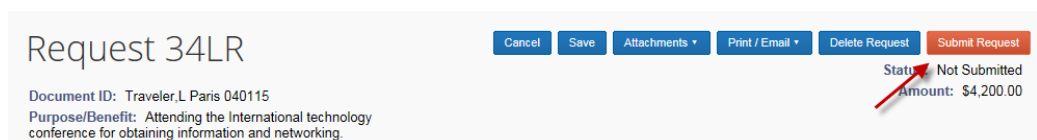
- Conference agenda/Hotel information showing rates
- Export Controls form/Foreign Travel Specific Statement Addendum for foreign travel
- Office of State-Federal Relations confirmation for travel to DC on state funds

STOP

Step 7: Submit the request in workflow.

DO NOT SUBMIT until Travel Coordinator has been notified to review. After review you will be notified through Concur and by email when to submit. Then follow Step 7 for submission.

Click on “Submit Request”.



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

University of Houston Concur Instructions
Creating a Travel Request

Final Review



Request Submit Confirmation

Are you sure you want to submit this request?



Accept & Submit

Cancel