

# University of Houston Concur Instructions

## Creating a Travel Request

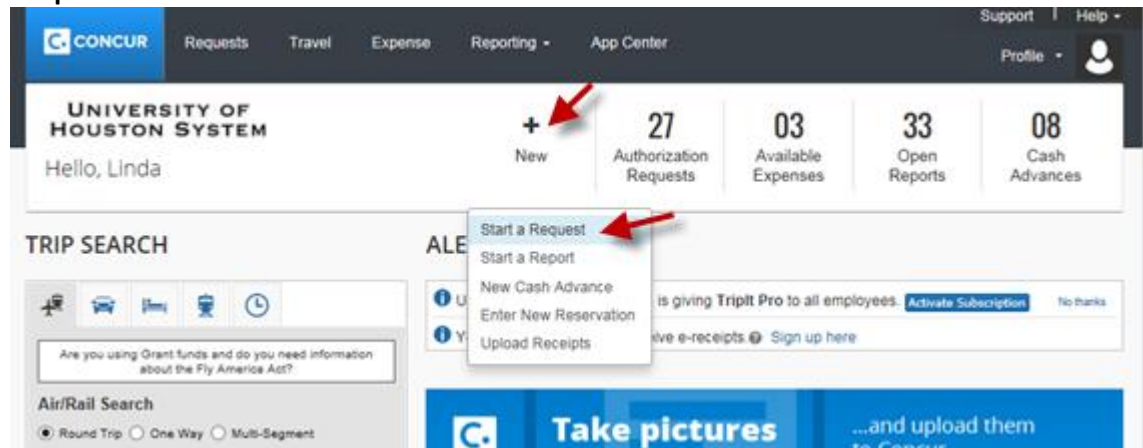
To complete a Travel Request in Concur, you need to login through *AccessUH* and click on “Concur Travel Management Icon”. From there, the screen will prompt you to “Login to Concur” and to the Homepage.

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

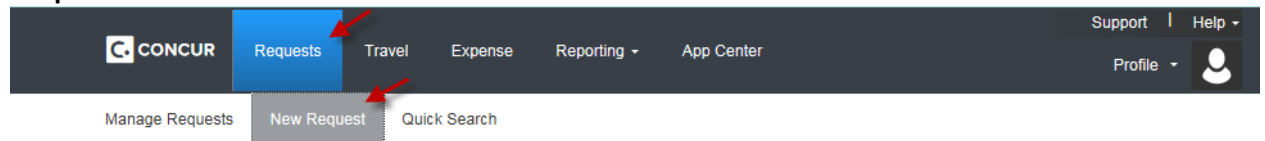
To go to the Request page, you can:

- (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.**

# University of Houston Concur Instructions

## Creating a Travel Request

**Request** Cancel Save Print / Email Delete Request Submit Request  
Status: Not Submitted

Document ID:  
Purpose/Benefit:

Request Header Segments Expenses Approval Flow Audit Trail

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 [?](#)  
Paris, FRANCE

Additional Destination Cities [?](#)

Business Unit  
(00730) University of Houston

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

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

Public Health Service (PHS) Grant [?](#)

### 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:

## University of Houston Concur Instructions Creating a Travel Request

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.

### **Travel Type**

# University of Houston Concur Instructions

## Creating a Travel Request

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

box: 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).

### **Foreign Travel for Employee/Prospective Employee**

## University of Houston Concur Instructions Creating a Travel Request

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.). Please email [Bertha Gil](#) to obtain cost center string.

### **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.

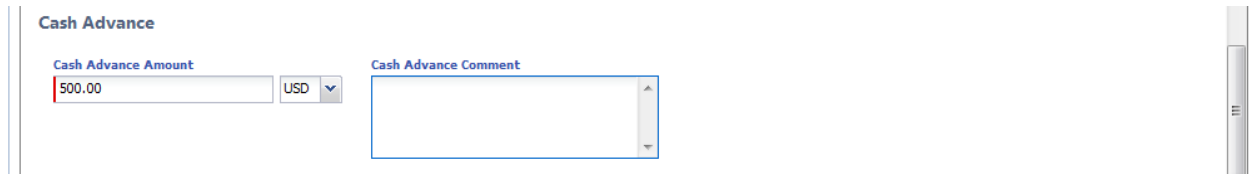
### **Step 3: If you are requesting a Travel Advance, complete the Cash Advance section.**

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.

# University of Houston Concur Instructions

## Creating a Travel Request

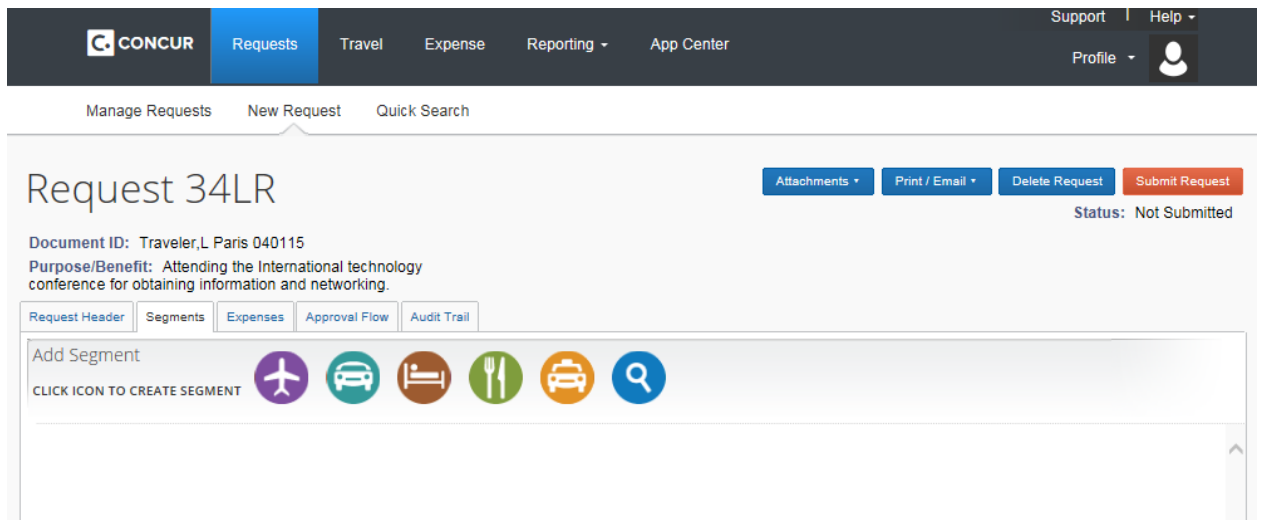
The Cash Advance section is on the bottom of the Request Header page. Enter the amount.



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



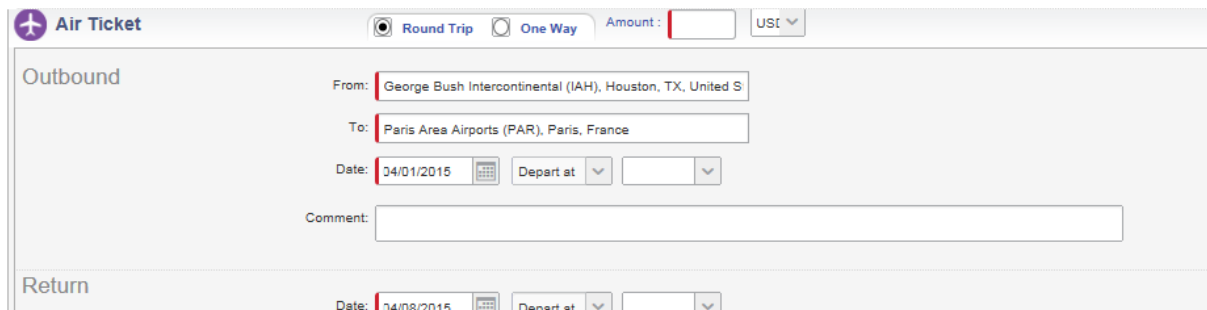
**Step 5: Complete the information in the Segments page.**



Click on an appropriate icon to complete the segment information.

### **Airfare**

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

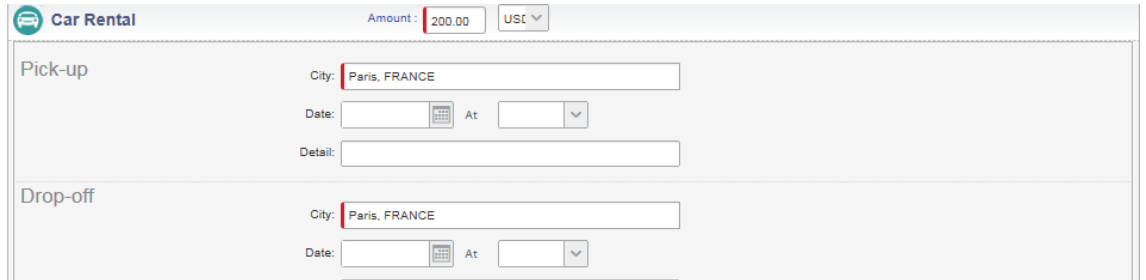


# University of Houston Concur Instructions

## Creating a Travel Request

### Car Rental

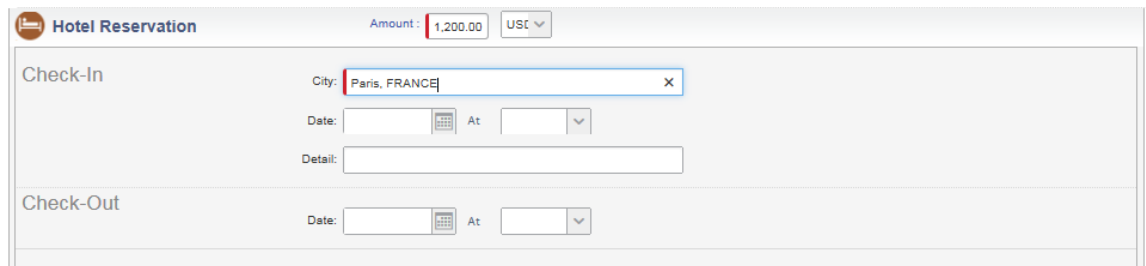
Enter the request amount, pick-up/drop-off cities. Other fields are optional. Click on “Save”.



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 (both containing 'Paris, FRANCE'), 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”.

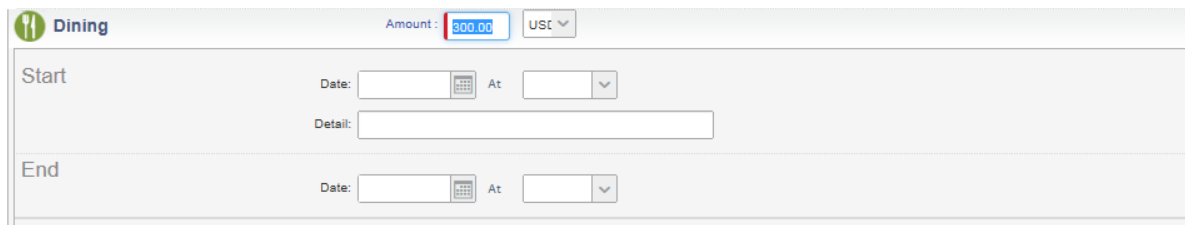


The screenshot shows the 'Hotel Reservation' form in Concur. At the top, there is a header with a hotel icon, the text 'Hotel Reservation', and a field for 'Amount' set to '1,200.00' with a currency dropdown set to 'USD'. Below this, the form is divided into two sections: 'Check-In' and 'Check-Out'.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



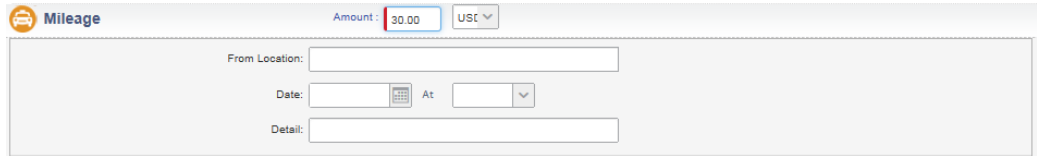
The screenshot shows the 'Dining' form in Concur. At the top, there is a header with a fork and knife icon, the text 'Dining', and a field for 'Amount' set to '300.00' with a currency dropdown set to 'USD'. Below this, the form is divided into two sections: 'Start' and 'End'. Each section has a 'Date' field with a calendar icon and an 'At' dropdown menu. There is also a 'Detail' text input field for the 'Start' section.

# University of Houston Concur Instructions

## Creating a Travel Request

### Mileage

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

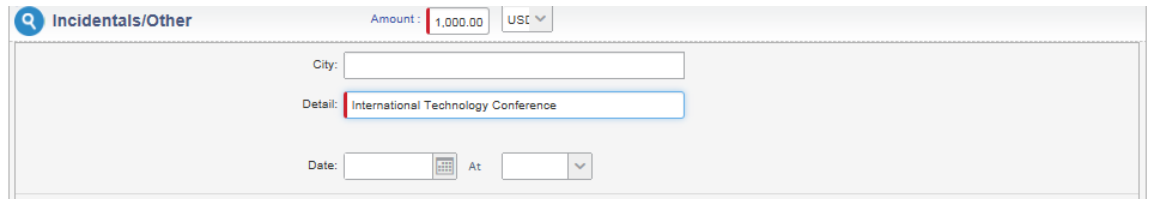


The screenshot shows the 'Mileage' form in Concur. At the top, there is a header with a car icon and the word 'Mileage'. To the right of the header, there is a field for 'Amount' with the value '30.00' and a dropdown menu for 'USD'. Below the header, there are three input fields: 'From Location:', 'Date:' (with a calendar icon and 'At' label), and 'Detail:'. The 'From Location' field is empty, the 'Date' field is empty, and the 'Detail' field is empty.

### 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 header with a magnifying glass icon and the text 'Incidentals/Other'. To the right of the header, there is a field for 'Amount' with the value '1,000.00' and a dropdown menu for 'USD'. Below the header, there are three input fields: 'City:', 'Detail:', and 'Date:' (with a calendar icon and 'At' label). The 'City' field is empty, the 'Detail' field contains the text 'International Technology Conference', and the 'Date' field is empty.

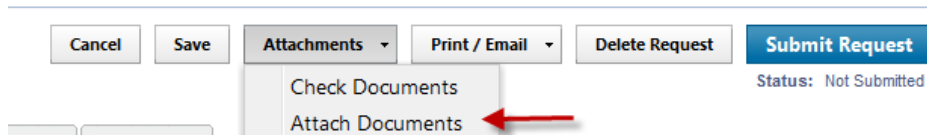


# University of Houston Concur Instructions

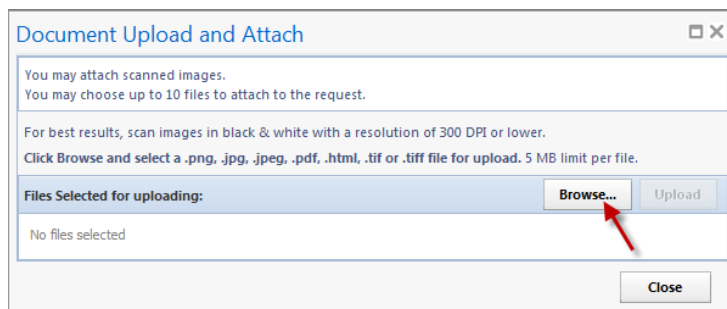
## Creating a Travel Request

### Step 6: Attach required documents if necessary.

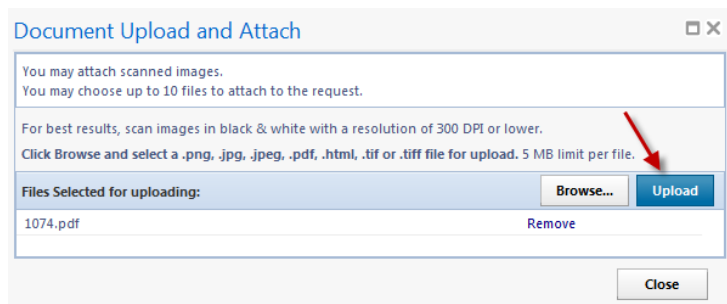
Click on “Attachments” and select “Attach documents”.



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



Upload the document by clicking on “Upload”.



### Documents to attach to the Travel Request for foreign travel:

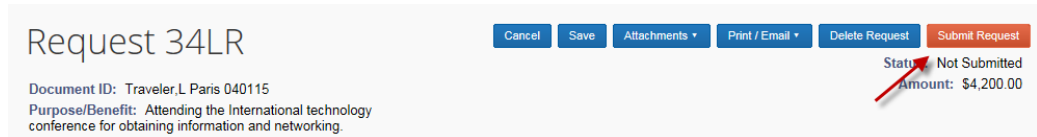
- Principal Investigator email-approval
- Proposed airfare
- Hotel information
- Conference registration rates
- Conference agenda and/or acceptance letter from the sponsor
- Export Controls and Travel Embargo form
- Fly America Act Waiver Checklist: If a Non-US carrier is paid with Federal funds, then the form must be completed to document the exception to the Fly America Act. The form must also be certified by the Department Business Administrator. Please contact [Bertha Gil](#) for further information.
- The Foreign Travel Statement

# University of Houston Concur Instructions

## Creating a Travel Request

### Step 7: Submit the request in workflow.

Click on "Submit Request".



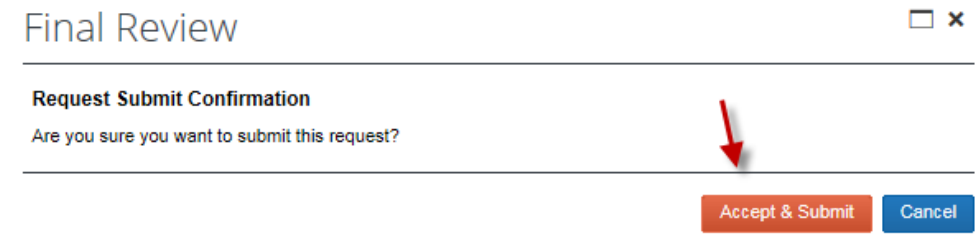
Request 34LR

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

Cancel Save Attachments Print / Email Delete Request Submit Request

Status: Not Submitted  
Amount: \$4,200.00

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



Final Review

Request Submit Confirmation

Are you sure you want to submit this request?

Accept & Submit Cancel

### Important key notes:

**\*\*Please note the TR must be fully approved by all approvers before finalizing travel arrangements. \*\***

- Please email [Bertha Gil](mailto:Bertha.Gil@uh.edu) for the cost center string information. The cost center string can also be found on the TIMES SharePoint Chart of Accounts:
  - <http://my.times.uh.edu/Core/admin/Lists/ChartOfAccounts/AllItems.aspx>
- Bertha will then notify you when the TR is ready for submission.