

# University of Houston Concur Instructions

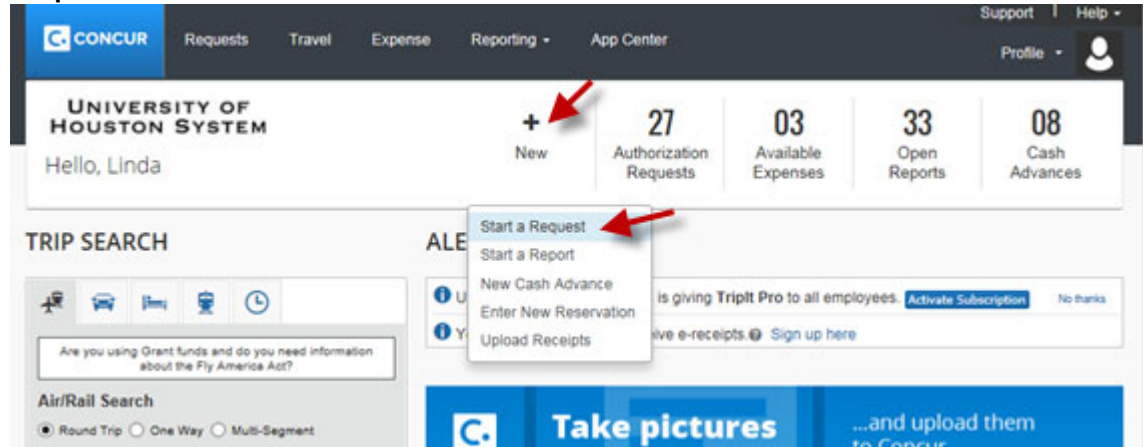
## Creating a Travel Request

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

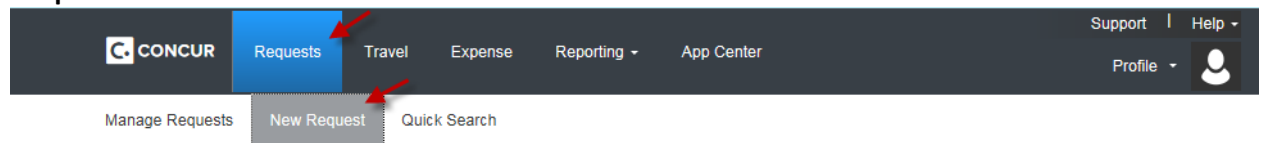
To go to the Request page, you can:

- (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.**

**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 1:   
Paris, FRANCE

Additional Destination Cities:

Business Unit:   
(00730) University of Houston

## University of Houston Concur Instructions

### Creating a Travel Request

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:

- 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)

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**

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).

## 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**

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.

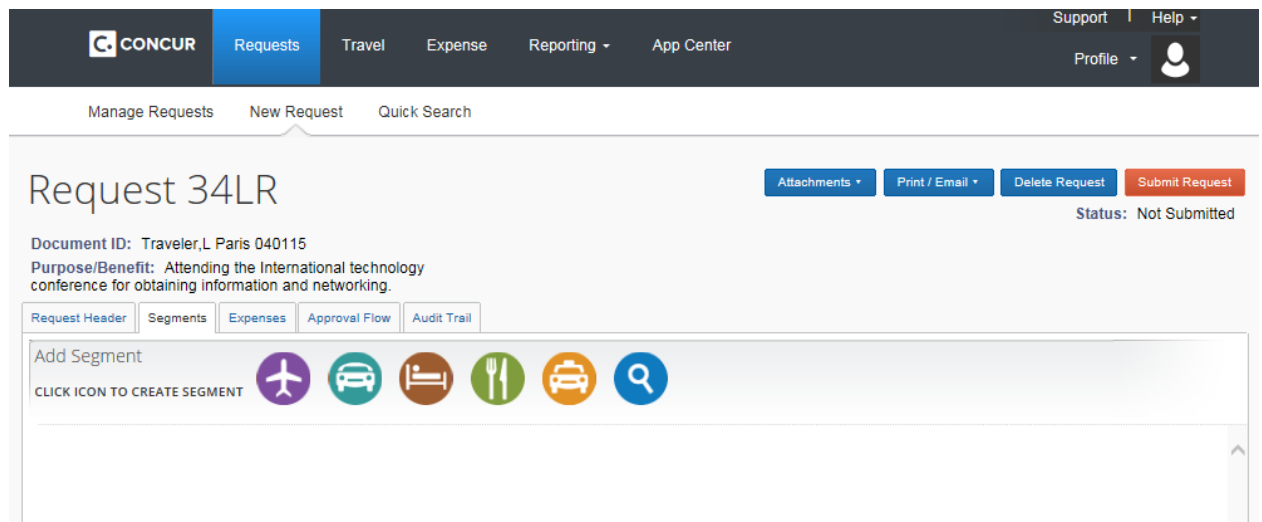
## University of Houston Concur Instructions

### Creating a Travel Request

**Step 3: Save the header information by clicking on “Save”.**



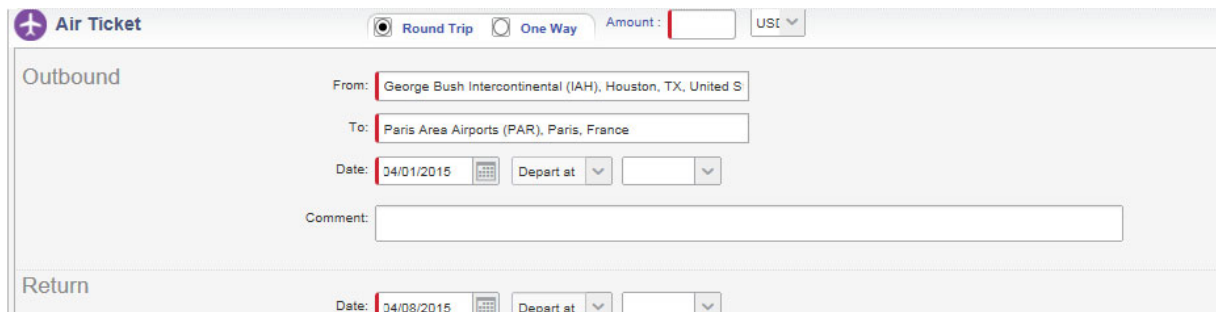
**Step 4: Complete the information in the Segments page.**



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”.

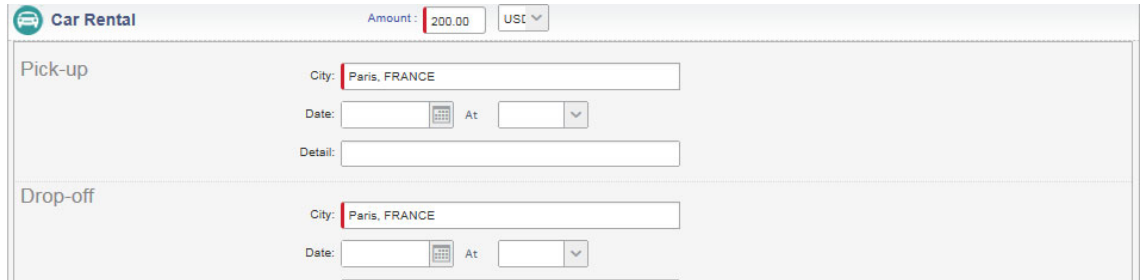


# University of Houston Concur Instructions

## Creating a Travel Request

### Car Rental

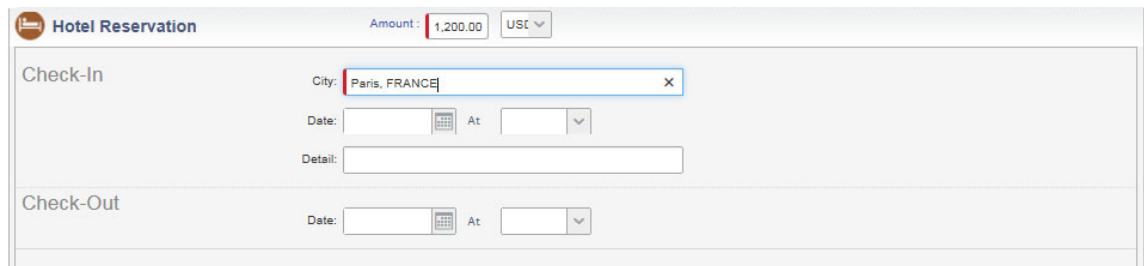
Enter the request amount, pick-up/drop-off cities. Other fields are optional. Click on “Save”.



The Car Rental form is titled "Car Rental" with a car icon. It features an "Amount" field set to "200.00" and a currency dropdown set to "USD". The form is divided into two sections: "Pick-up" and "Drop-off". Each section contains a "City" field (both set to "Paris, FRANCE"), a "Date" field with a calendar icon, an "At" dropdown, and a "Detail" text field.

### Hotel Reservation

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

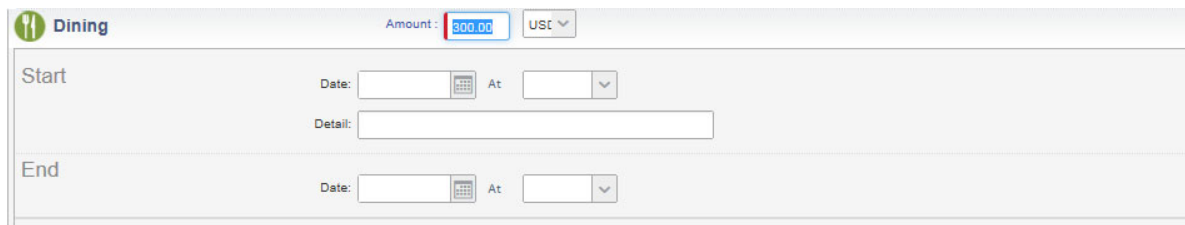


The Hotel Reservation form is titled "Hotel Reservation" with a hotel icon. It features an "Amount" field set to "1,200.00" and a currency dropdown set to "USD". The form is divided into two sections: "Check-In" and "Check-Out". The "Check-In" section contains a "City" field (set to "Paris, FRANCE" with a clear 'X' button), a "Date" field with a calendar icon, an "At" dropdown, and a "Detail" text field. The "Check-Out" section contains a "Date" field with a calendar icon and an "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.



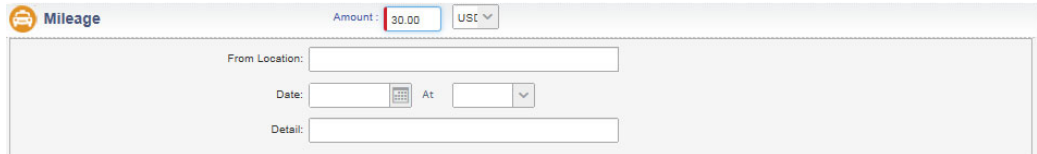
The Dining form is titled "Dining" with a fork and knife icon. It features an "Amount" field set to "300.00" and a currency dropdown set to "USD". The form is divided into two sections: "Start" and "End". Each section contains a "Date" field with a calendar icon, an "At" dropdown, and a "Detail" text field.

# University of Houston Concur Instructions

## Creating a Travel Request

### Mileage

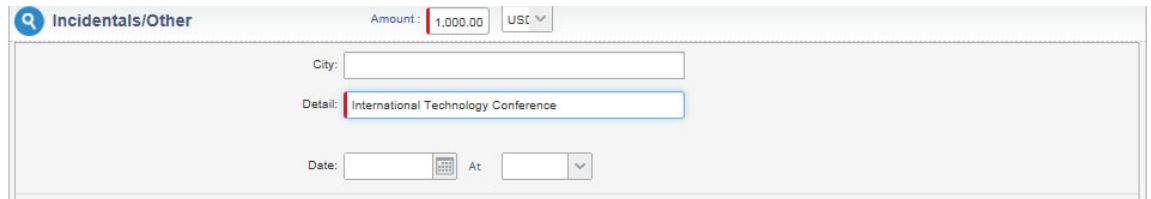
Enter the amount and “Save”. Other fields are optional.

The screenshot shows the 'Mileage' form in the Concur system. At the top, there is a header bar 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 several input fields: 'From Location:', 'Date:', 'At:', and 'Detail:'. The 'Date' and 'At' fields are grouped together with a calendar icon and a dropdown arrow respectively.

### Incidentals/Other

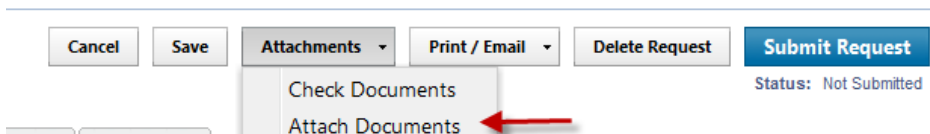
Enter the request amount and expense detail. Other fields are optional. Click on “Save”.

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.

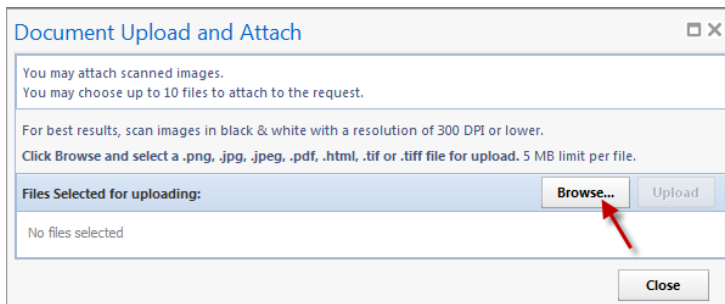
The screenshot shows the 'Incidentals/Other' form in the Concur system. At the top, there is a header bar with a magnifying glass icon and the text 'Incidentals/Other'. To the right of the header, there is a field for 'Amount' with the value '1,000.00' and a dropdown menu for 'USD'. Below the header, there are several input fields: 'City:', 'Detail:', and 'Date:'. The 'Detail' field contains the text 'International Technology Conference'. The 'Date' and 'At' fields are grouped together with a calendar icon and a dropdown arrow respectively.

### Step 5: Attach required documents if necessary.

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

The screenshot shows the bottom of the Concur form, specifically the 'Attachments' dropdown menu. The menu is open, showing two options: 'Check Documents' and 'Attach Documents'. A red arrow points to the 'Attach Documents' option. To the right of the menu, there is a 'Submit Request' button and a status indicator that says 'Status: Not Submitted'.

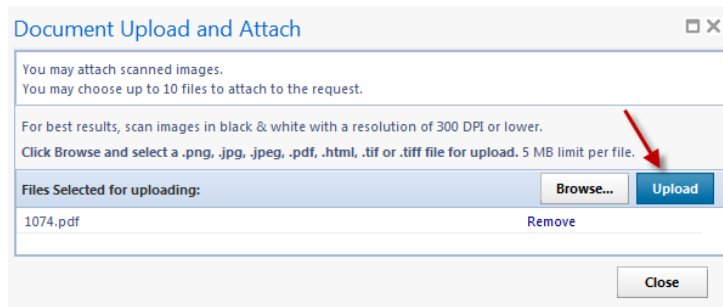
Click on “Browse” and select any documents from your file to attach.

The screenshot shows the 'Document Upload and Attach' dialog box in the Concur system. The dialog box has a title bar with the text 'Document Upload and Attach' and a close button. Inside the dialog, there is a text area with instructions: 'You may attach scanned images. You may choose up to 10 files to attach to the request. For best results, scan images in black & white with a resolution of 300 DPI or lower. Click Browse and select a .png, .jpg, .jpeg, .pdf, .html, .tif or .tiff file for upload. 5 MB limit per file.' Below the text area, there is a section titled 'Files Selected for uploading:' with a 'Browse...' button and an 'Upload' button. A red arrow points to the 'Browse...' button. At the bottom of the dialog, there is a 'Close' button.

Upload the document by clicking on “Upload”.

## University of Houston Concur Instructions

### Creating a Travel Request



Document Upload and Attach

You may attach scanned images.  
You may choose up to 10 files to attach to the request.

For best results, scan images in black & white with a resolution of 300 DPI or lower.  
Click Browse and select a .png, .jpg, .jpeg, .pdf, .html, .tif or .tiff file for upload. 5 MB limit per file.

Files Selected for uploading:

1074.pdf Remove

Browse... Upload

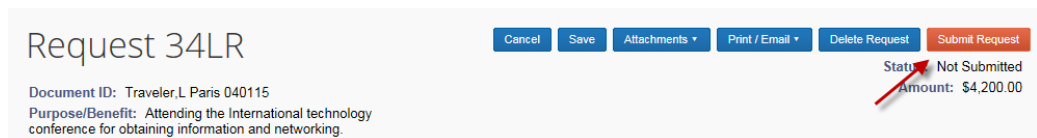
Close

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 6: Submit the request in workflow.

Click on “Submit Request”.



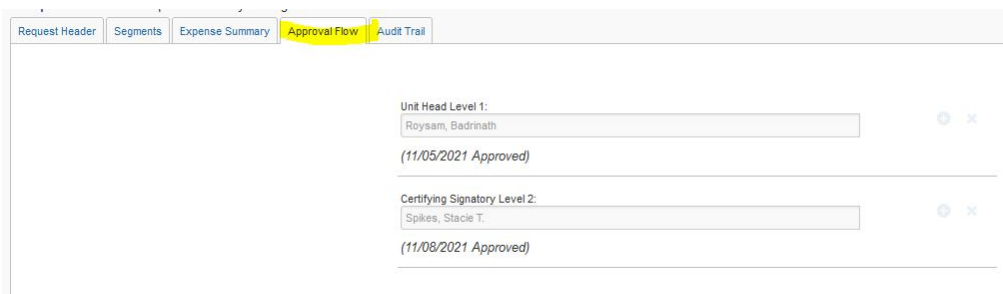
Request 34LR

Cancel Save Attachments Print / Email Delete Request Submit Request

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

Status: Not Submitted  
Amount: \$4,200.00

Before submitting your request, please look under the "Approval Flow" tab to ensure **Badrinath Roysam** is the level 1 approver & **Stacie Spikes** is the level 2 or final approver. Search for approvers by pressing \* in the box. Contact ECE front desk if there are any issues.

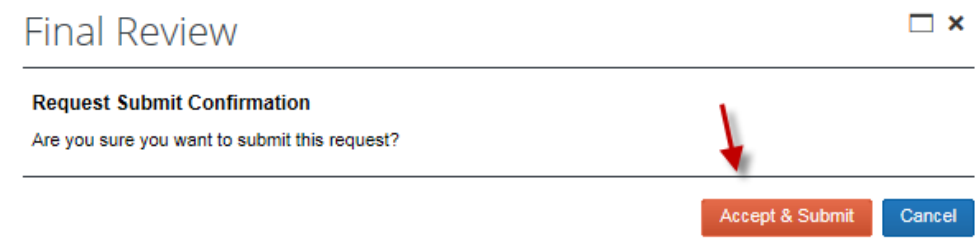


Request Header Segments Expense Summary **Approval Flow** Audit Trail

Unit Head Level 1:  
Roysam, Badrinath  
(11/05/2021 Approved)

Certifying Signatory Level 2:  
Spikes, Stacie T.  
(11/08/2021 Approved)

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