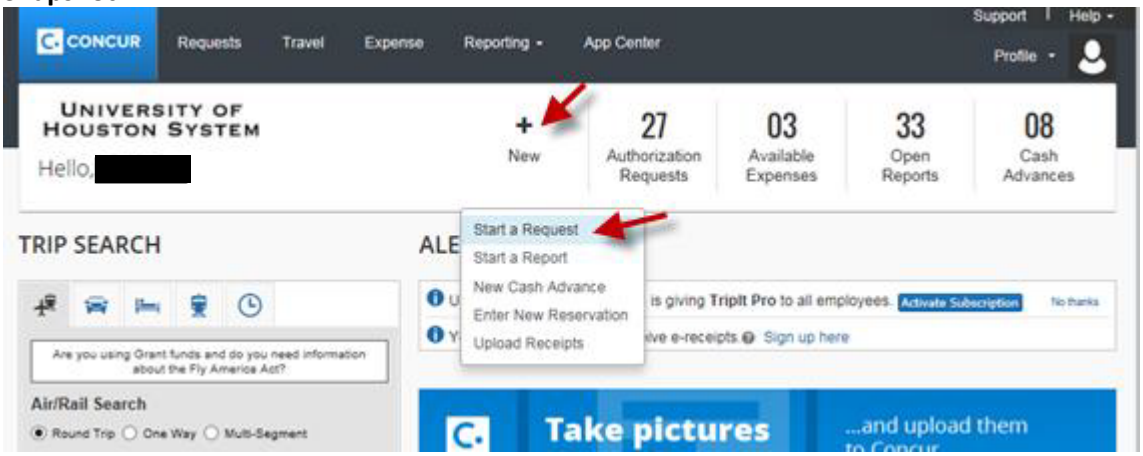
University of Houston Concur Instructions
Creating a Travel Request

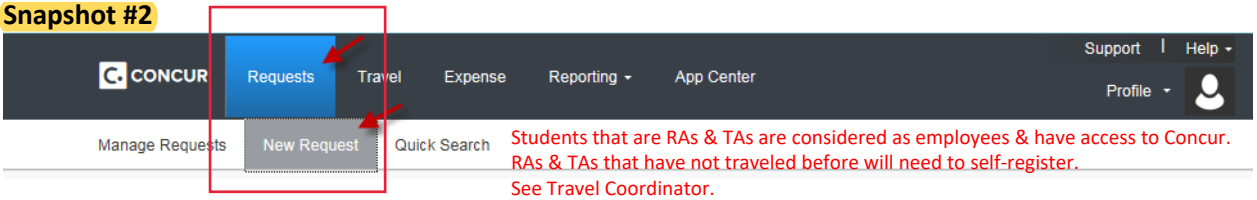
Step 1: Go to the Request page and select "New Request".

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**

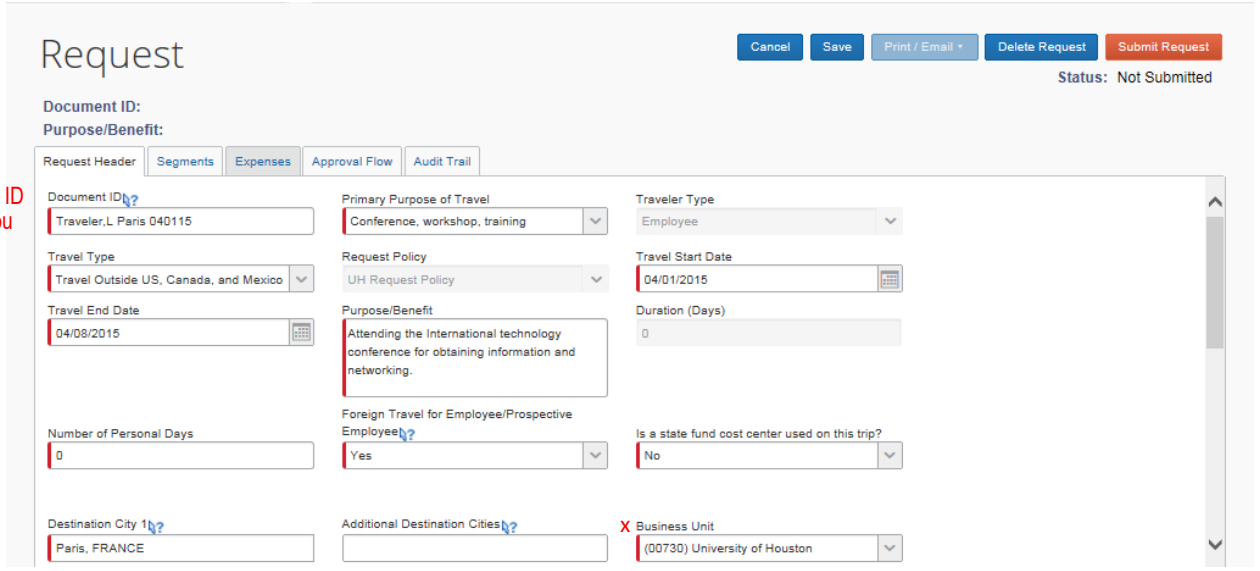


Students that are RAs & TAs are considered as employees & have access to Concur. RAs & TAs that have not traveled before will need to self-register. See Travel Coordinator.

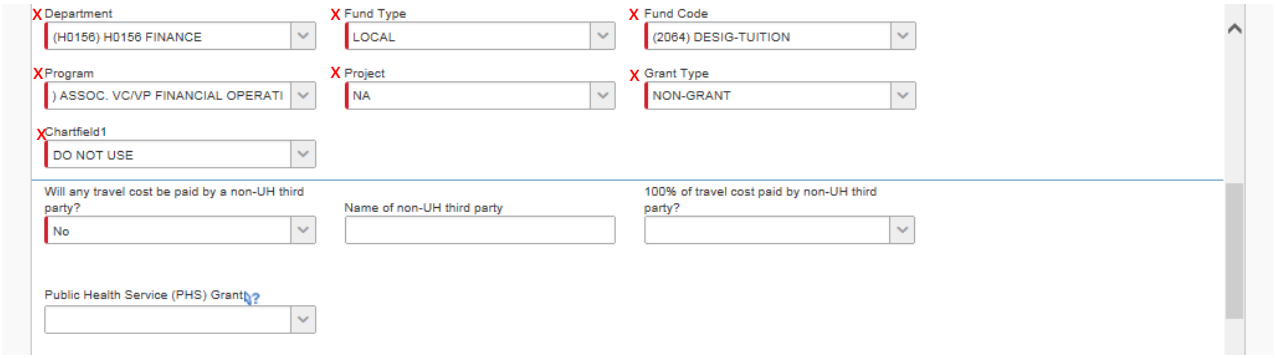
NOTE: Students (not RAs & TAs) and Guests do not have access to Concur. Professor requesting travels should contact Travel Coordinator by email to create Concur travel account/travel request.

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.



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.

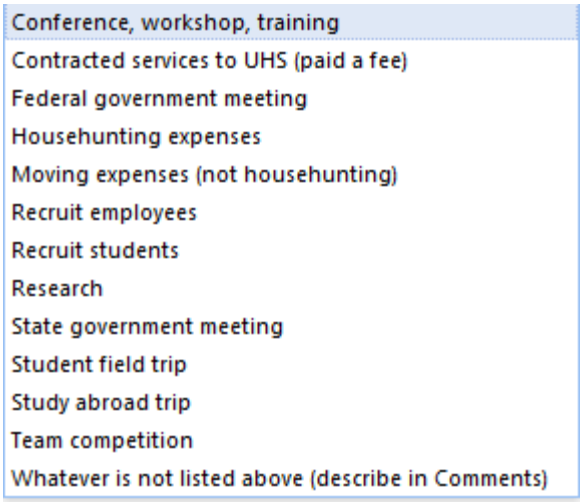


Document ID

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:



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)

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

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

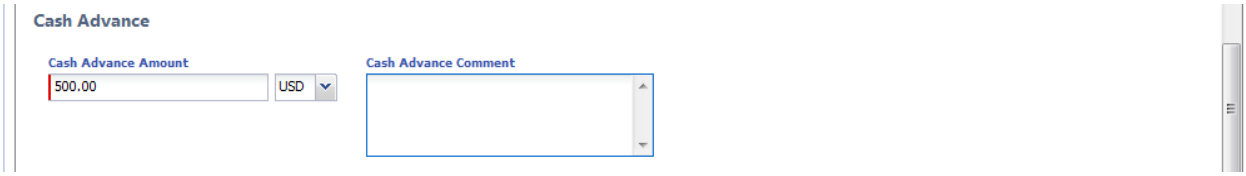
If "Yes" is selected for a non-UH third party payment, indicate the traveler's association with a PHS grant. If the traveler's salary was paid from a PHS grant and/or he/she is an investigator on the grant, Concur sends an e-mail notification to the Office of Research Policies, Compliance, and Committees, 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

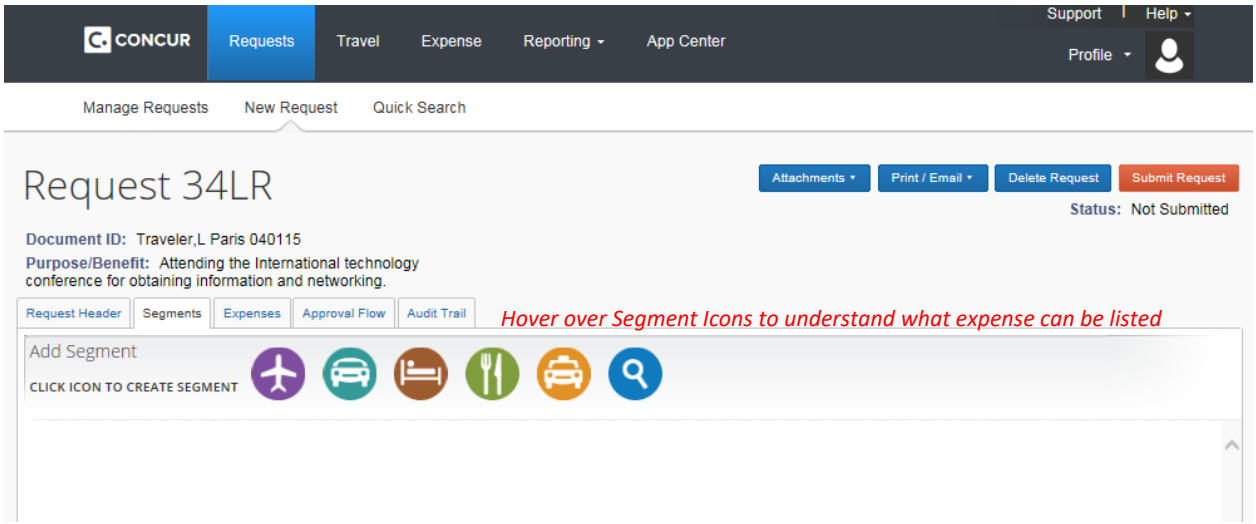
Note: Travel Advances are available for employee foreign travel and group travel only. Only employees who are eligible for Travel Advances may receive Travel Advances.

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".

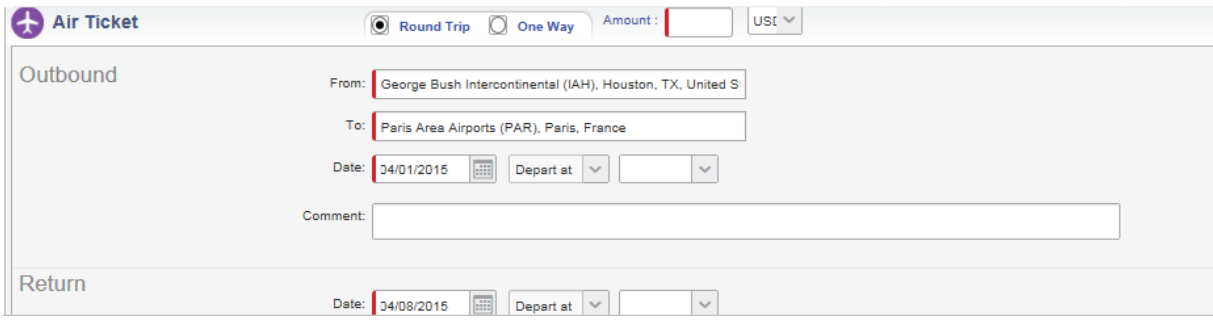
Step 5: Complete the information in the Segments page.



Click on an appropriate icon to complete the segment information.

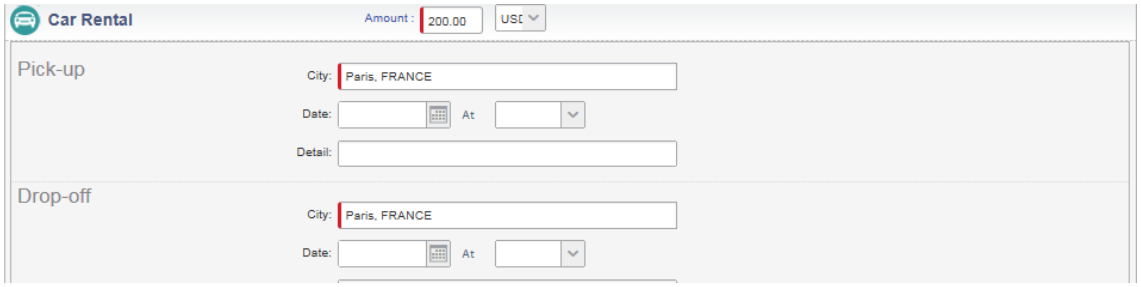
Airfare

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



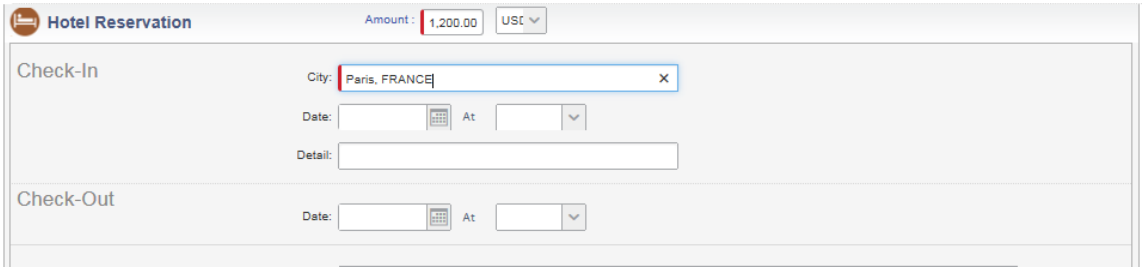
Car Rental

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



Hotel Reservation

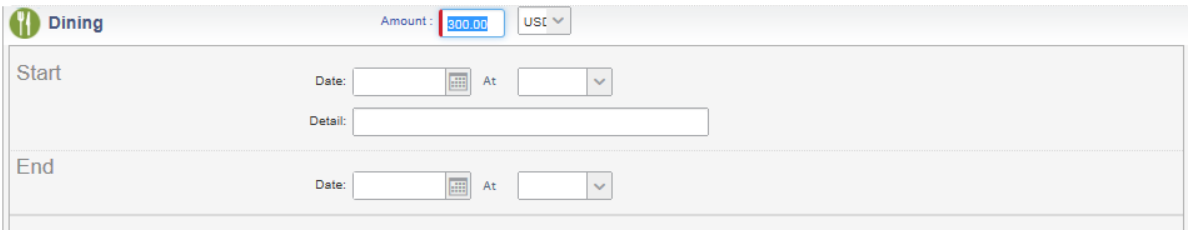
Enter the request amount and city. Other fields are optional. Click on "Save".



Dining (Travel Meals)

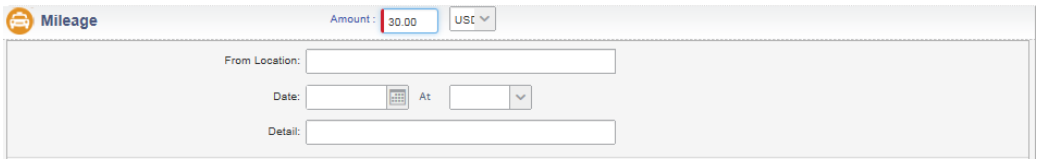
Enter the request amount. Other fields are optional. Click on "Save".

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



Mileage

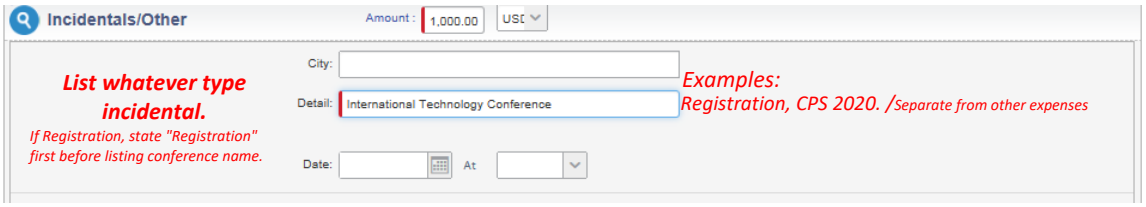
Enter the amount and "Save". Other fields are optional.



Incidentals/Other

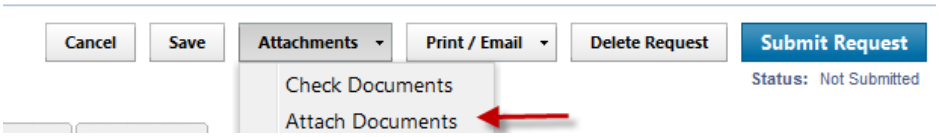
Enter the request amount and expense detail. Other fields are optional. Click on "Save".

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.

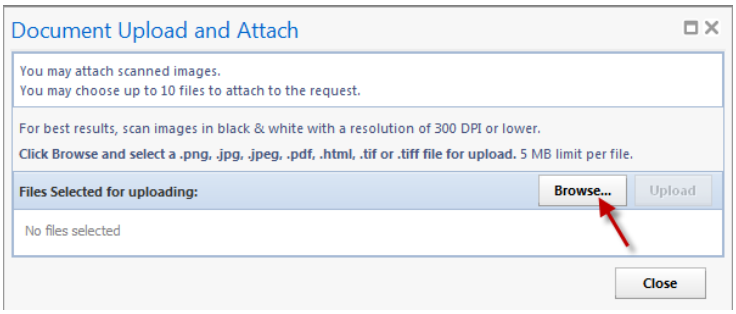


Step 6: Attach required documents if necessary.

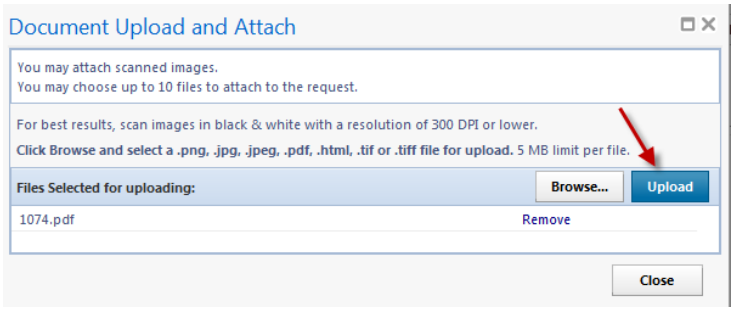
Click on "Attachments" and select "Attach documents".



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:

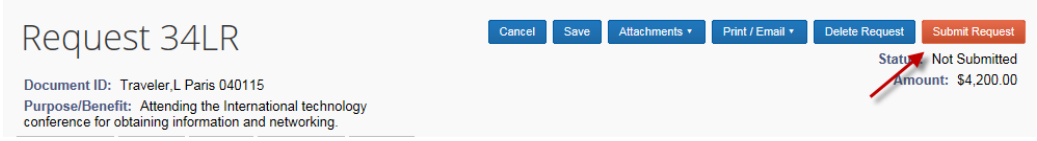
- Conference agenda/Hotel information showing rates
- Export Controls form/Foreign Travel Specific Statement Addendum for foreign travel
- Office of State-Federal Relations confirmation for travel to DC on state funds

STOP

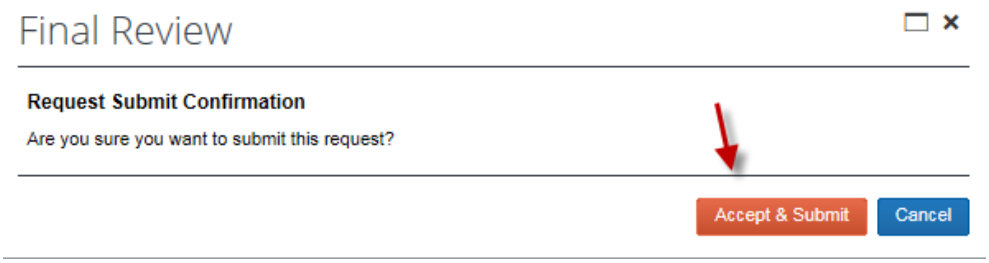
Step 7: Submit the request in workflow.

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"


Final Review
Request Submit Confirmation
Are you sure you want to submit this request?
Accept & Submit
Cancel