

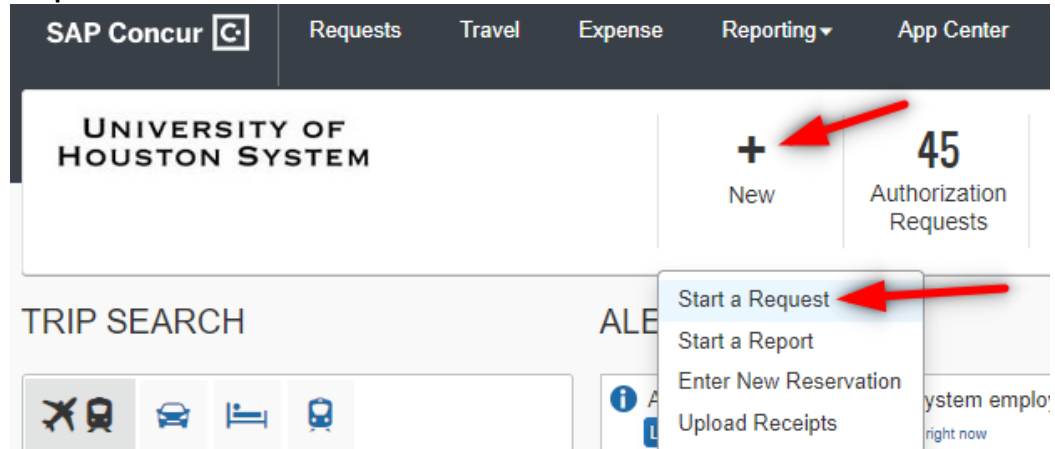
University of Houston-Downtown Concur Instructions Creating a Travel Request

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

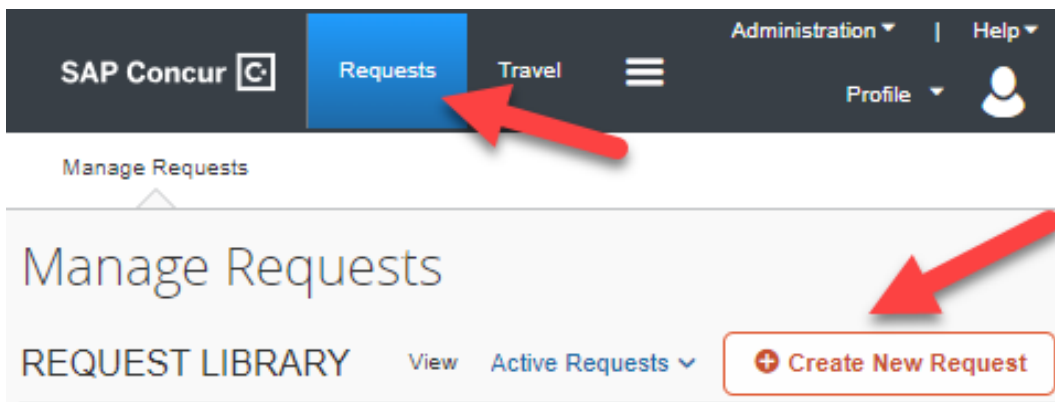
To go to the Request page, you can:

- (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



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Step 2: Complete the information in the Request Header (all fields with a red asterisk * are required) then click Create Request

Create New Request

Type text h

Request Destination/Date * ? Traveler, L Paris 07/11/22	Travel Type * Employee Travel Outside US, Canada, and Me... ▾	Traveler Type * Required field Employee
Travel Start Date * 07/11/2022	Travel End Date * 07/16/2022	Duration (Days) 0
Main Destination * ? Paris, FRANCE × ▾	Destination Country FRANCE (FR)	Additional Destination Cities ?
Number of Personal Days * 0	Primary Purpose of Travel * Conference, workshop, training ▾	Description/Purpose and Benefit * Attending the International technology conference for obtaining information and networking.

Cancel Create Request

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
- Recruit employees
- Recruit students
- Research
- State government meeting
- Student field trip
- Study abroad trip
- Team competition
- Whatever is not listed above (describe in Comments)

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Traveler Type

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

Travel Type

Select the travel type from the dropdown box:

- 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
- Prospective Employee Travel
- Prospective Student Travel
- Student Field Trip in the US
- Student Study Abroad Travel
- Student Team Competition
- Student Travel (Not Field Trip, Study Abroad, Competition)
- 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 UHD Request Policy.

Travel State Date and **Travel End Date**

Enter the departure date and return dates.

Purpose/Benefit

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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

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.

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-UHD third party payment, enter the name of the third

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

If "Yes" is selected for a non-UHD 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

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If “Yes” is selected for a non-UHD 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.

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Step 5: Complete the information in the Expected Expenses page by Adding the expected expenses for your trip

EXPECTED EXPENSES						
<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Allocate"/>						
<input type="checkbox"/>	Alerts ↑↓	Expense type ≡	Details ↑↓	Date ↑↓	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>		Air Ticket	Houston (IAH) - Paris (CDG) : Round Trip	07/11/2022	\$750.00	\$750.00
<input type="checkbox"/>		Car Rental	Paris, FRANCE - Paris, FRANCE	07/11/2022	\$500.00	\$500.00
<input type="checkbox"/>		Dining		07/11/2022	\$400.00	\$400.00
<input type="checkbox"/>		Hotel Reservation	Paris, FRANCE	07/11/2022	\$800.00	\$800.00
<input type="checkbox"/>		Mileage		07/11/2022	\$50.00	\$50.00
<input type="checkbox"/>		Other Incidental Expenses	Conference Registration Fee	07/11/2022	\$700.00	\$700.00
					\$3,200.00	

Air Ticket

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

New Expense: Air Ticket

Outbound

From * To *

Date * Depart at

Comment

Return

Date * Depart at

Comment

Amount * Currency *

Car Rental

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

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New Expense: Car Rental Cancel Save

* Required field

Pick-up

City * Date At

Detail

Drop-off

City * Date At

Detail

Comment

Amount * Currency *

Hotel Reservation

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

New Expense: Hotel Reservation Cancel Save

* Required field

Check-In

Date At City *

Detail

Check-Out

Date At

Comment

Amount * Currency *

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Dining (Travel Meals)

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

New Expense: Dining

[Cancel](#) [Save](#)

* Required field

Start

Date: At: Detail:

End

Date: At:

Comment:

Amount * Currency *

Mileage

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

Type text here

New Expense: Mileage

[Cancel](#) [Save](#)

* Required field

Outbound

From Location: Date: At:

Detail:

Return

To Location: Date: At:

Detail:

Comment:

Amount * Currency *

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Other Incidental Expenses

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.

New Expense: Other Incidental Expenses \$700.00

Allocate

Transaction Date * 07/11/2022

Description Conference Registration Fee

Transaction Amount * 700.00

Currency * US, Dollar

Comment International Technology Conference

Step 6: Attach required documents if necessary.

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

Traveler, L Paris 071122 \$3,200.00

Not Submitted | Request ID: A4UU

Request Details Print/Share Attachments

Attach Documents

Click on “**Upload and Attach**” and select any documents from your file to attach.

Document Upload and Attach

Upload and Attach

Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.

Close

Examples of documents to attach to the Travel Request:

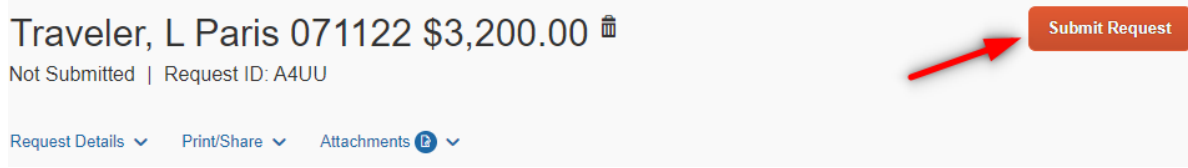
- Conference agenda
- Export Controls form for foreign travel
- Office of State-Federal Relations confirmation for travel to DC on state funds

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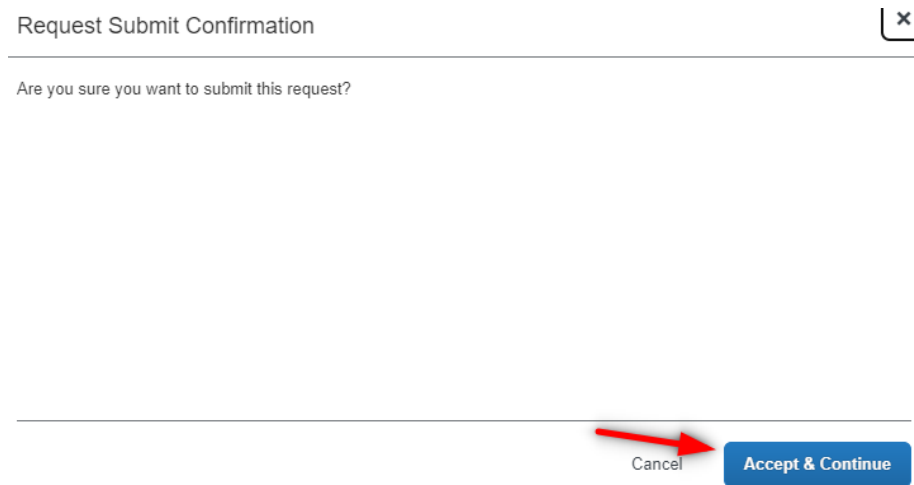
Creating a Travel Request

Step 7: Submit the request in workflow.

Click on "Submit Request".

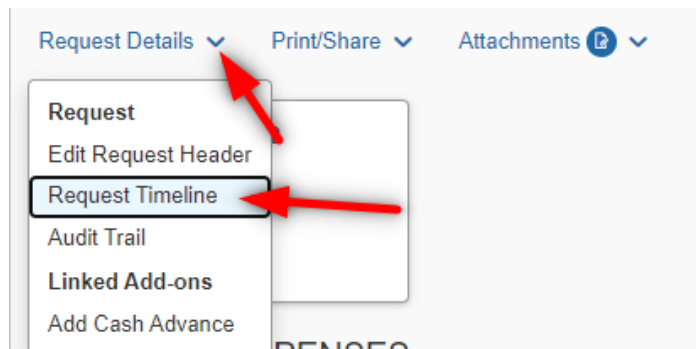


The system asks for your confirmation. Click on "Accept & Submit"



Step 8 (Optional): If you need to adjust the Approval Flow click on Request Details > Request Timeline

On Request Timeline click on Edit. From here you can then edit the Approval Flow > click Save



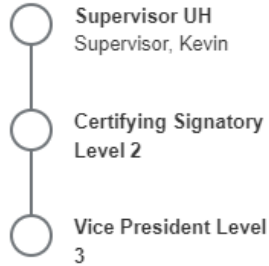
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Creating a Travel Request

Request Timeline

Traveler, L Paris 071122 | \$3,200.00

Approval Flow [Edit](#)



Request Summary

EXPENSE COMMENT Other Incidental Expenses | 07/11/2022 | \$700.00 [View](#)
Traveler, Linda 07/06/2022

International Technology Conference

[Add Comment](#)

Edit Approval Flow



Supervisor UH

Supervisor, Kevin

Certifying Signatory Level 2

▼ Search by Last Name

Vice President Level 3

▼ Search by Last Name

Cancel

Save