

University of Houston  Clear Lake

# **UHCL CONCUR**

*TRAVEL GUIDE*

**Business Operations – Version 1**

**June 2023**

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- \* 7-10 days**

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- \* If  $\leq 50\%$  of days**

- \* If  $> 50\%$**

- \* If During Foreign Trip**

**Repaying UHCL**

- \* Within 45 days**

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# A. Getting Started

## Contact Information

- University of Houston-Clear Lake - Travel Office

Phone: 281-283-2270

Email: [traveloffice@uhcl.edu](mailto:traveloffice@uhcl.edu)

Travel webpage: <https://www.uhcl.edu/about/administrative-offices/travel/>

- Corporate Travel Planners – Please check with the Travel Office

- Travel Card - Contact CitiBank Customer Service 24/7: 1-800-248-4553

**Fraudulent Activity:** Call Citibank Customer Service 24/7 – 1-800-248-4553 and notify Travel Office @ 281-283-2270 or email, [traveloffice@uhcl.edu](mailto:traveloffice@uhcl.edu).

**Lost or Stolen Card:** Call Citibank Customer Service 24/7 – 1-800-248-4553 and notify Travel Office @ 281-283-2270 or email, [traveloffice@uhcl.edu](mailto:traveloffice@uhcl.edu).

## Concur Design Overview: 3 Basic Modules

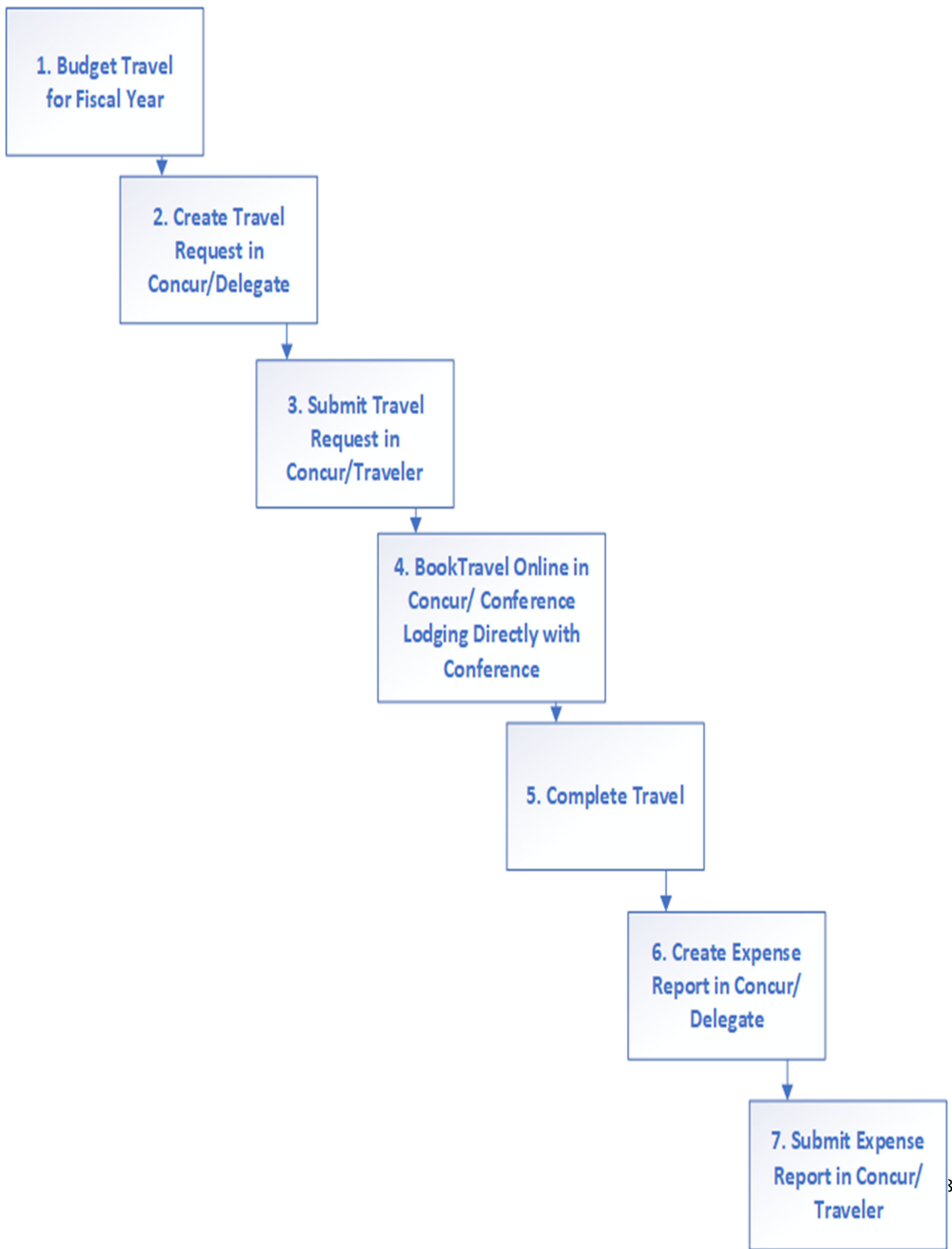
✓ The **Request** module enables you to seek approval for the trip and associated estimated expenses ***before*** you travel.

✓ The **Expense** module enables you to enter all your information. This will include receipts for all your expenses to request reimbursement. Entry of the information ***is not a guarantee*** of full reimbursement. Various federal, state, and local rules govern what is fully reimbursable and what is not. The Travel Office can help you understand your approved amount if you have any questions.

✓ The **Travel** module is where your requested itinerary is transformed into actual bookings for your trip. This includes hotel, car, airfare and/or other transport. Online bookings are included within Concur for no additional charge. Any bookings purchased directly through the travel agency for exceptional circumstances such as emergency travel or international group trips carry additional cost and should not be used as a general best practice.

## Travel Steps and Flowchart


















1. BUDGET IN ADVANCE FOR TRAVEL!
  2. REQUEST APPROVAL FOR ITINERARY & COST
    - TRAVELER OR DELEGATE MAY REQUEST
    - UPLOAD FOREIGN TRAVEL DOCUMENTS FOR INTERNATIONAL TRIP
  3. SUBMIT TRAVEL REQUEST
    - **TRAVELER SUBMITS**
  4. BOOK/PLAN TRAVEL ONLINE
    - TRAVELER OR DELEGATE MAY BOOK
  5. TAKE TRIP – COMPLETE TRAVEL
    - SAVE RECEIPTS ELECTRONICALLY
    - USE TRAVEL CARD FOR **ALL** UHCL BUSINESS TRAVEL EXPENSES; KEEP CARD FOR SUBSEQUENT REUSE
  6. CREATE EXPENSE REPORT
    - TRAVELER OR DELEGATE MAY CREATE
  7. SUBMIT EXPENSE REPORT
    - **TRAVELER SUBMITS**
- ★ ALSO...
- RESOLVE ISSUES/QUESTIONS TIMELY, AS NEEDED
  - REPAY UHCL FOR NON-REIMBURSABLE EXPENSES CHARGED ON TRAVEL CARD, AS NEEDED.







# Icons










## Request Icons

| Icon  | Name                 | Description  |
|---|----------------------|--|
|    | Attachments          | Indicates that the user has attached a document to the request.  |
|    | Filter               | Indicates that the user can filter items in a list.  |
|    | Attendees            | Indicates that a request has associated attendees.   |
|    | Attendee Groups      | Indicates a group of attendees.  |
|    | Recent Attendees     | Indicates attendees recently added to the report.  |
|    | Import Attendees     | Indicates that the user can import attendees using the import feature.   |
|    | Location             | Indicates the to and from location for the leg of a trip.  |
|    | Time                 | Indicates the start time and end time of a trip. Also, indicates the creation of segments for requests.                                  |
|   | Calendar             | Indicates that the user can click the icon to access the calendar popup.   |
|  | Exception            | Indicates that an expense entry has an exception that does not prevent submission.   |
|  | Alert                | Indicates an exception that does not prevent submission. Also appears when the user is deleting an expected expense from a request.      |
|  | Information          | Indicates an exception that does not prevent submission.   |
|  | Success              | Indicates when the attend import completes successfully, appears in the Request Timeline dialog, and on the <b>Agency Proposal</b> page. |
|  | Partial Allocation   | Indicates a particular set of previously used allocations saved as favorites.  |
|  | New Allocation       | Indicates that the user can add a new allocation.  |
|  | Favorite Allocations | Indicates previously favored allocations available to add to a report.   |
|  | Budget Item          | Indicates that the item is allocated to a budget you manage and requires your budget approval.   |

## Request Icons (cont'd)

| Icon  | Name              | Description   |
|---|-------------------|---|
|  | Request Sent Back | Indicates that the approver sent a request back to the submitter with comments. |
|  | Question          | Indicates a question that does not prevent submission.                          |

## Expense Icons

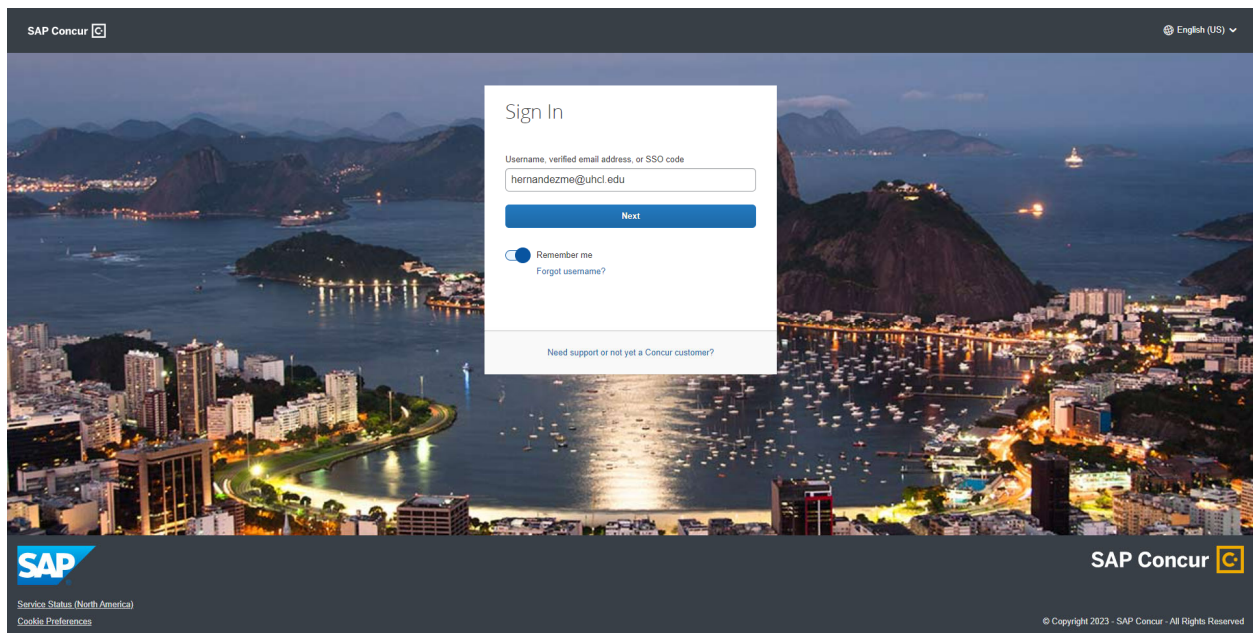
| Icon  | Name        | Description  |
|---|-------------|--|
|   | Success     | Indicates that all required approvals have been processed.               |
|  | Add         | Indicates that the user can add a new item.                              |
|  | Delete      | Indicates the ability to delete an object.                               |
|  | Exception   | Indicates an exception must be resolved before submission.               |
|  | Question    | Indicates a question that does not prevent submission.                   |
|  | Information | Indicates an exception that does not prevent submission.                 |
|  | Alert       | Indicates an exception that does not prevent submission.                 |
|  | Calendar    | Indicates that the user can click the icon to access the calendar popup. |
|  | View Image  | Indicates that the user can click the icon to view an image.             |

## Getting Started Checklist

- Login to Concur
  - Open internet browser and go to [www.concursolutions.com](http://www.concursolutions.com)
  - Use your UHCL single sign on to log in
  
- Go to your Profile and confirm Profile Information
  - Name, ID, basic contact information
  - Add any desired information (phone numbers, alternate email, etc.)
  - Activate e-receipts
  
- Complete Delegate Information
  - In Profile under Request Settings click Request Delegates
  - Add desired Delegate
  - Only the Traveler may request delegate(s) - up to 250
  - A Delegate may not self-select for the Traveler

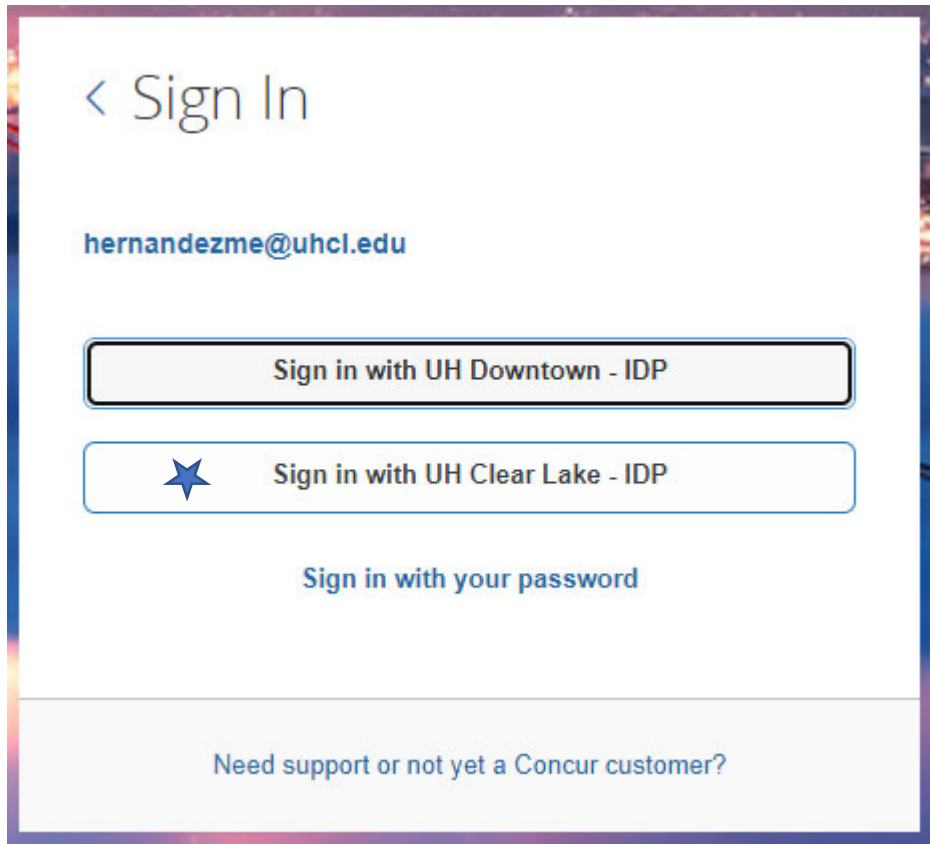
## B. Signing In ... and Getting Moving!

Go to: <https://www.concursolutions.com/>



**Enter your UHCL email address and click next (example: [doej@uhcl.edu](mailto:doej@uhcl.edu))**

Click Sign in with UHCL - IDP



Sign on using just your **username** and **password**.



# Welcome to Concur!

**SAP Concur** | Requests | Travel | Expense | App Center | Profile | Help

**UNIVERSITY OF HOUSTON SYSTEM**

**+** New | **03** Authorization Requests | **00** Available Expenses | **02** Open Reports

### TRIP SEARCH

Are you using Grant funds and do you need information about the Fly America Act?

**Mixed Flight/Train Search**

Round Trip | One Way | Multi City

From: Departure city, airport or train station

To: Arrival city, airport or train station

**Search** | Show More

### MY TRIPS (0)

You currently have no upcoming trips.

### ALERTS

- As an employee of University of Houston System, you are eligible for a free Tript Pro subscription. [Learn More and Activate](#) Not right now
- You haven't signed up to receive e-receipts. [Sign up here](#)

### COMPANY NOTES

Export Controls and Travel Embargo Form

Citi Training

**Welcome to the UH System Travel and Expense Online Tool** [Read more](#)

### MY TASKS

|   |   |                                      |
|---|---|--------------------------------------|
| <b>03</b> Open Requests →                                       | <b>00</b> Available Expenses →            | <b>02</b> Open Reports →             |
| 11/16 96146Seattle112022<br>\$1,982.27 — Travel Cost Estimate   | You currently have no available expenses. | 06/02 38344Blanket111822             |
| 10/07 38344Blanket111822<br>\$72.71 — Travel Cost Estimate      |   | 06/01 96146Seattle112022<br>\$597.00 |
| 07/24 50078Lexington072822<br>\$3,201.00 — Travel Cost Estim... |   |                                      |

# Home Page

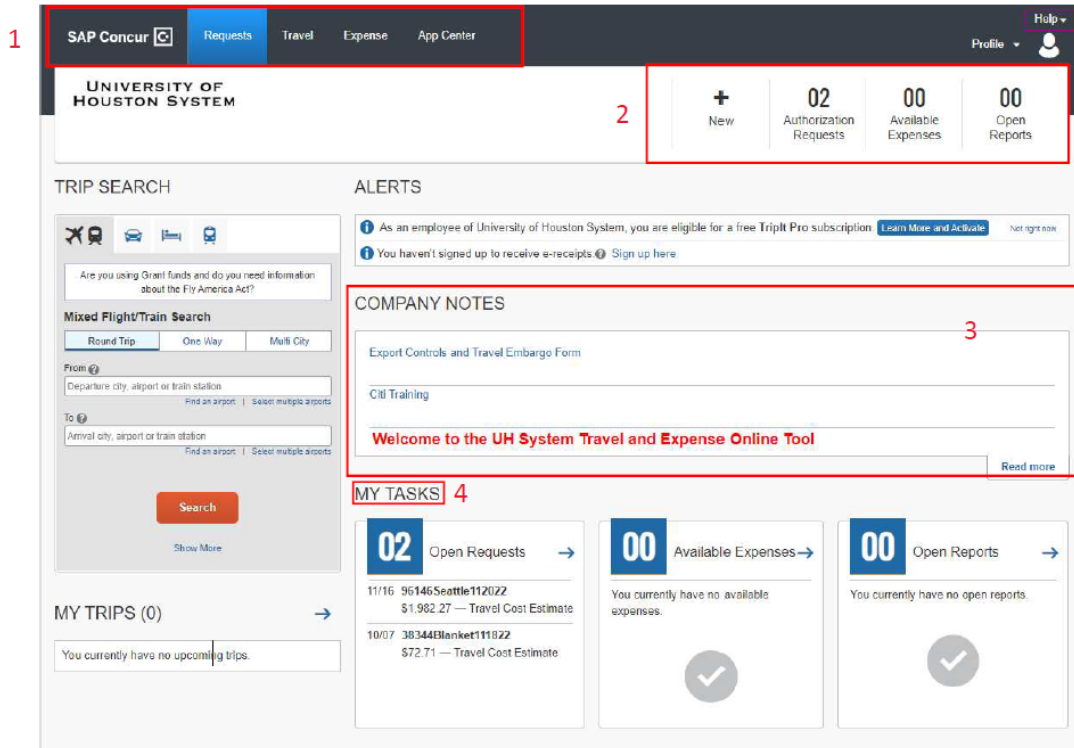
The appearance of a traveler's home page will vary based on the permissions of each traveler.

- 1. Top Header**
  - SAP Concur Tab** Will return the traveler to their home page.
  - Request Tab** Will take the traveler to the travel request page.
  - Expense Tab** Will take the traveler to the expense reports page.
  - Approvals Tab** Will take Approver to requests and reports that are awaiting approval (if applicable).

**2. Quick Task Bar** - Links to start a New Request, Travel, Reports, Upload Receipts, View, Open Reports, Pending Authorization Request and Available Expenses. Also allows Traveler to view number of requests, reports and other tasks pending traveler.

**3. Company Notes** - University-wide messages regarding travel updates and other Concur messages.

**4. My Task** - A quick overview of tasks pending traveler's action. Clicking on **Open Request**, **Available Expenses** or **Open Reports** will take the traveler to the respective page.

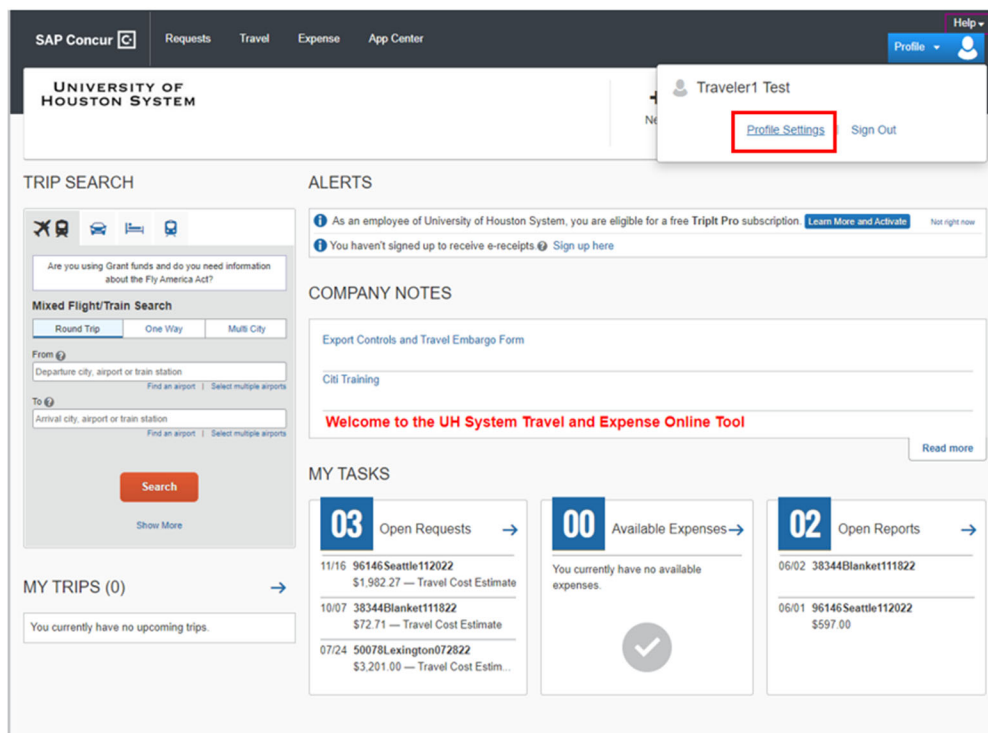


# Using Delegates

A traveler may assign a delegate to *create* their travel request and expense reports for them. They may also have the delegate view receipts and receive emails on their behalf. The permissions provided to the delegate depend on how the traveler sets up their profile; delegates may have fewer permissions than the traveler. **It is the traveler's ultimate responsibility to submit these requests and reports. The delegate does *not* have permission to submit requests or expense reports on behalf of the traveler.**

## Selecting A Delegate

Select Profile and then Profile Settings

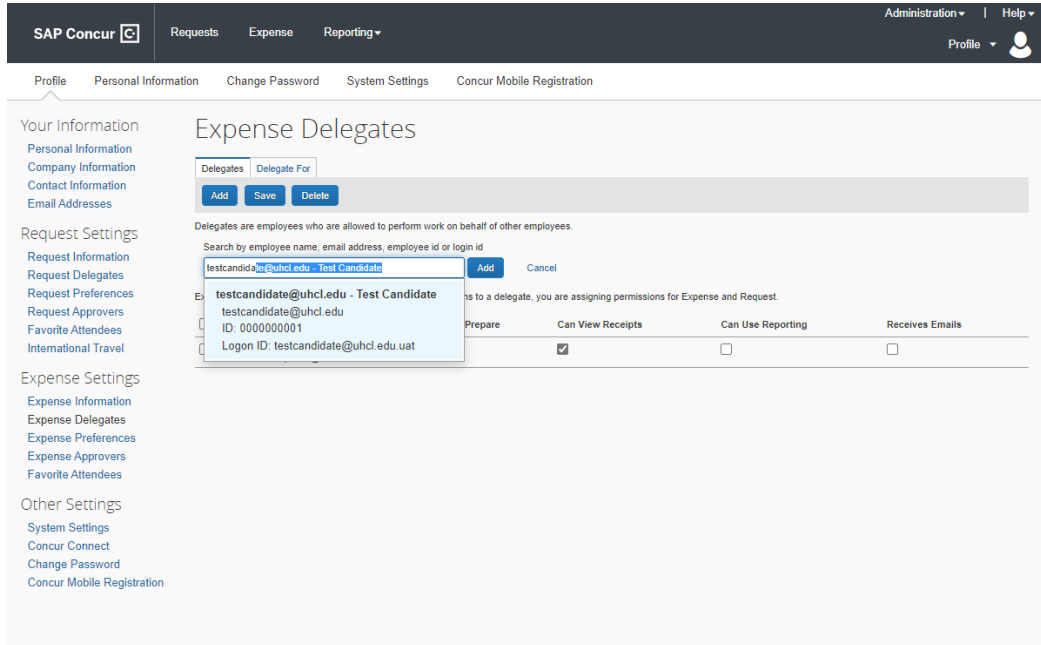




Click Expense or Request Delegates.

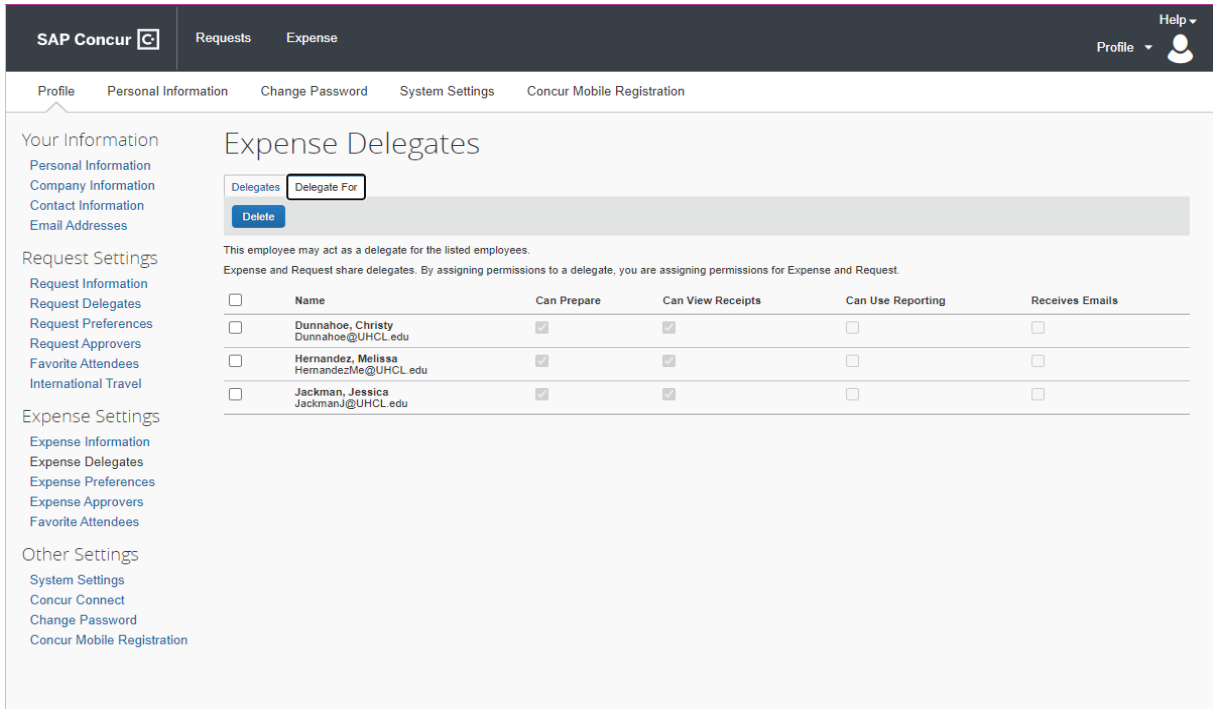
The screenshot shows the SAP Concur user interface. At the top, there is a navigation bar with 'SAP Concur' logo, 'Requests', 'Travel', 'Expense', and 'App Center'. On the right, there is a 'Profile' dropdown menu and a 'Help' button. Below the navigation bar, there is a sub-navigation bar with 'Profile', 'Personal Information', 'Change Password', 'System Settings', and 'Concur Mobile Registration'. The main content area is titled 'Profile Options' and contains several sections: 'Your Information', 'Travel Settings', 'Request Settings', 'Expense Settings', and 'Other Settings'. The 'Request Settings' section includes 'Request Information', 'Request Delegates', 'Request Preferences', 'Request Approvers', and 'Favorite Attendees'. The 'Expense Settings' section includes 'Expense Information', 'Expense Delegates', 'Expense Preferences', 'Expense Approvers', and 'Favorite Attendees'. The 'Request Delegates' and 'Expense Delegates' links are highlighted with a red rectangular box. The 'Profile Options' section also includes 'Personal Information', 'Company Information', 'Credit Card Information', 'E-Receipt Activation', 'Expense Delegates', 'Expense Preferences', 'Concur Mobile Registration', 'System Settings', 'Contact Information', 'Setup Travel Assistants', and 'Travel Profile Options'.

**Click Add** and then a search bar will appear. You can look up by last name, email address, employee id or login. Once you have the delegate selected then **Click Add**.



**Note:** The traveler will need to complete this delegate set-up process for both travel request and expense reporting activities. A person who seeks to assist a traveler without having been set up as a delegate in advance by the traveler will not be able to create transactions in Concur.

Click Delegate to see which travelers have given permission to delegate on their behalf.



The screenshot shows the SAP Concur user interface for the 'Expense Delegates' page. The top navigation bar includes 'SAP Concur', 'Requests', and 'Expense'. The user's profile is visible in the top right corner. The left sidebar contains navigation links for 'Your Information', 'Request Settings', 'Expense Settings', and 'Other Settings'. The main content area is titled 'Expense Delegates' and features a 'Delegates' section with a 'Delegate For' button and a 'Delete' button. Below this, a table lists three employees with their names and email addresses, and checkboxes for 'Can Prepare', 'Can View Receipts', 'Can Use Reporting', and 'Receives Emails'. The table data is as follows:

| <input type="checkbox"/> | Name                                       | Can Prepare                         | Can View Receipts                   | Can Use Reporting        | Receives Emails          |
|--------------------------|--|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | Dunnahoe, Christy<br>Dunnahoe@UHCL.edu     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | Hernandez, Melissa<br>HernandezMe@UHCL.edu | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | Jackman, Jessica<br>JackmanJ@UHCL.edu      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

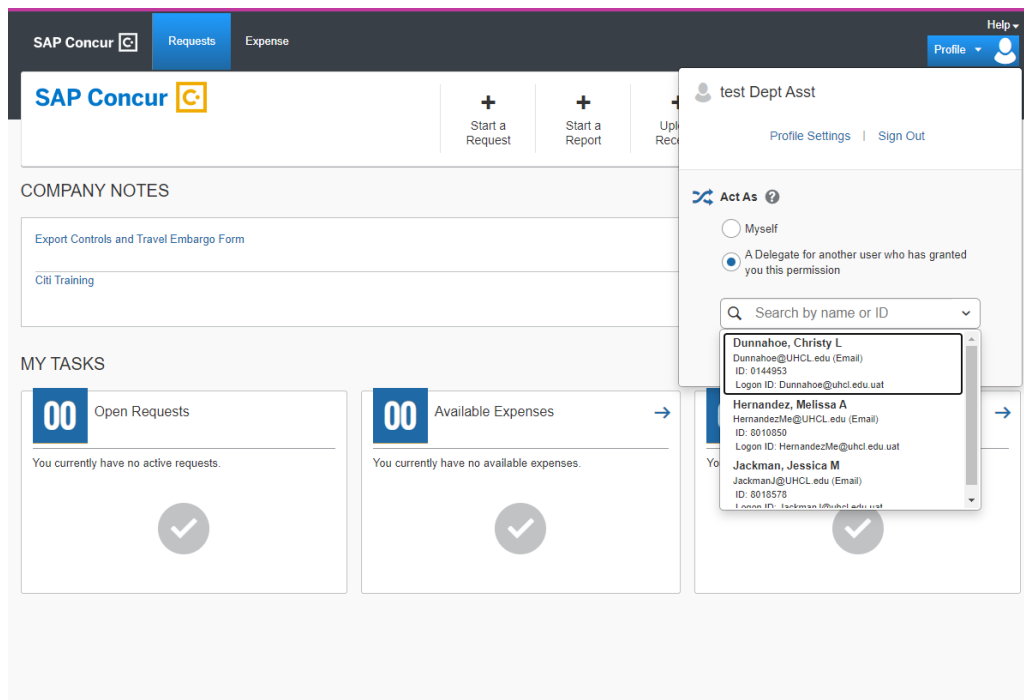
## Delegate Role

To ***assume the Delegate role*** (after the traveler has created your delegate role) you must also create a connection to your traveler within Concur.

**It is a 2-way process!**

To do that, **Click on Profile**, and then select under **Act As** select **A Delegate for another Traveler who has granted you this permission**.

The delegate can type in the last name of the traveler they are a delegate for, or they can use the drop-down arrow and will be given a list of Travelers they have been given permissions to delegate for and select from the list. Then **Click Switch**.



The page will change and at the top where profile was you will see **Acting As** and the **Traveler** you are delegating for.

To return to acting as yourself (not as a delegate), or to become the delegate of a different Traveler simply **Click Acting As** and a box will pop up. Select **Myself** or **A Delegate for Traveler who has granted you this permission**.

Then **Click Switch**.

The screenshot shows the SAP Concur Expense page. The top navigation bar includes 'SAP Concur', 'Requests', and 'Expense'. The user is currently acting as 'Dunnahoe, Christy L'. A modal window titled 'Act As' is open, showing options to 'Myself' (selected) or 'A Delegate for another user who has granted you this permission'. Below the modal, the page content is visible, including 'COMPANY NOTES' and 'TASKS'.

**COMPANY NOTES**

- Export Controls and Travel Embargo Form
- Citi Training

**TASKS**

| Count | Task Name          | Action |
|-------|--------------------|--------|
| 02    | Open Requests      | →      |
| 00    | Available Expenses | →      |
| 01    | Open Reports       | →      |

**Open Requests Details:**

- 02/01 50078 Dallas 020523: \$1,000.00 — Travel Cost Estimate
- 01/29 50078 Las Vegas, NV 020123: \$2,265.34 — Travel Cost Estimate

**Available Expenses Details:**

- User currently has no available expenses.

**Open Reports Details:**

- 01/31 156394 Qatar 032522: \$350.40

# Requesting Travel

There are multiple ways to view a travel request, create a travel request and return to a travel request that was previously created.

From the Home page **Click** the Request tab. The Traveler will be taken to the Request Page. The Traveler will see the status of requests pending approval and can also create new requests.

SAP Concur Requests Travel Expense App Center

Manage Requests

Manage Requests

REQUEST LIBRARY View [Active Requests](#) [Create New Request](#)

|   |  |
|---|--|
| <b>96146Seattle112022</b><br>11/16/2022   G66W<br><b>\$1,982.27</b><br><a href="#">Approved</a> | <b>38344Blanket111822</b><br>10/07/2022   G6DC<br><b>\$72.71</b><br><a href="#">Approved</a> |
|---|--|

[View more](#)  
Displayed Requests: 2, Total: 2

From the Home page, **Clicking** Authorization Requests or Open Requests will also take the Traveler to the Request page.

SAP Concur

+ Start a Request   + Start a Report   + Upload Receipts   01 Authorization Requests   00 Available Expenses   02 Open Reports

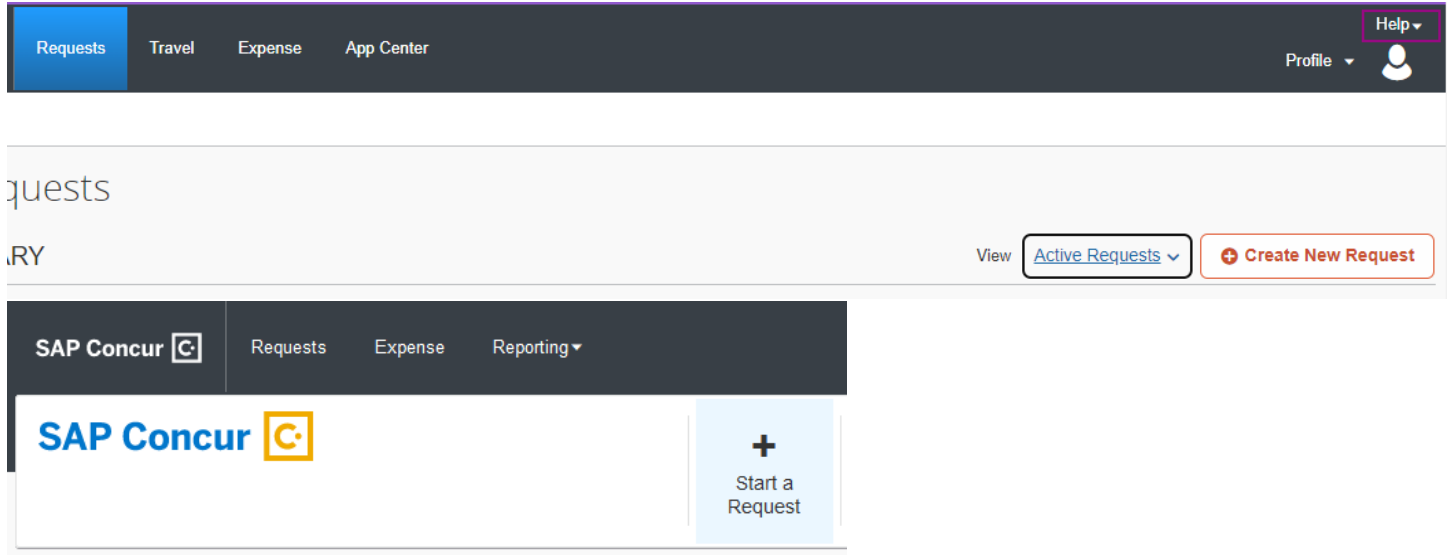
MY TASKS

**01** Open Requests →

01/13 123456Phoenix011323  
\$1,338.58 — Travel Cost Estimate

# Create a Request

You can start a request by **Clicking** the Requests tab and then Create New Request or by **Clicking** Create a Request on the Quick Task Bar on the home page.

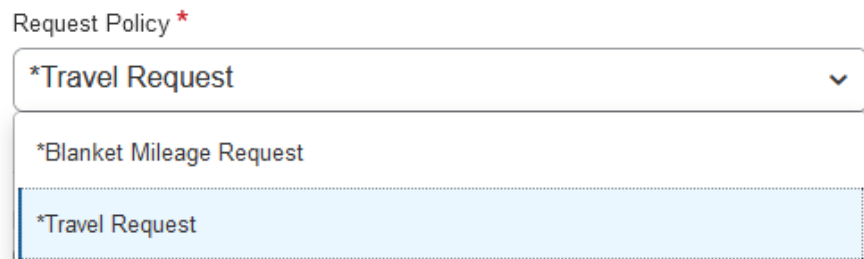


## **Request Policy** - This Automatically defaults to the Travel Request Policy!

You may select Blanket Mileage instead via the drop-down arrow.

**Travel Request** - Travel outside of local mileage. Including in state, out of state and foreign travel.

**Blanket Mileage** -Travel that is only within *local* mileage



**Document ID** - This number uniquely identifies the travel per traveler.  
(*Examples: 54321Dallas052422 or 987654Blanket030123*)

**Vendor ID** - Enter **without** leading zeroes (*Example: 987654 instead of 0000987654*)

**City of Travel** - If several cities are involved use the last city name or enter Blanket for local mileage

**Last Date of Travel** - MM/DD/YYYY (*Example: 01/01/2023*)

**Traveler Type** - This is predetermined by the Concur setup and cannot be changed.

**Duration (Days)** - Days will automatically be calculated once the Travel Start and Travel End Dates have been entered. (*Not on Blanket mileage form*)

**Travel Start Date and Travel End Dates** - Enter the date travel will begin and end either by entering using calendar icon or manual entry using **MM/DD/YYYY** format.

**Number of Personal Days & List Personal Days** - Enter the *number of personal days* then list the dates in **MM/DD/YYYY** format in the List Personal Days field. **If none, enter 0.**  
(*Not on Blanket mileage form*)

Number of Personal Days \*

1

List Personal Days

01/08/23

**Purpose of Travel** - Select drop-down arrow and **select** purpose that most closely aligns with travel

**Benefit** - Provide a detailed benefit statement that describes the **benefit to UHCL** for travel, **do not** use acronyms or abbreviations. **Limit to 500 characters.**



# Cost Center Information

Use the drop-down arrows in each box to select an option.

Business Unit \*

Fund Code \*

Department \*

Fund Type \*

Grant Type \*

Program \*

Project \*

Business Unit \*

Fund Code \*

Department \*

Fund Type \*

Grant Type \*

Program \*

Project \*

Once all information is entered, **Click** Create Request at the bottom right of the form. This will take you to the Expected Expenses page.

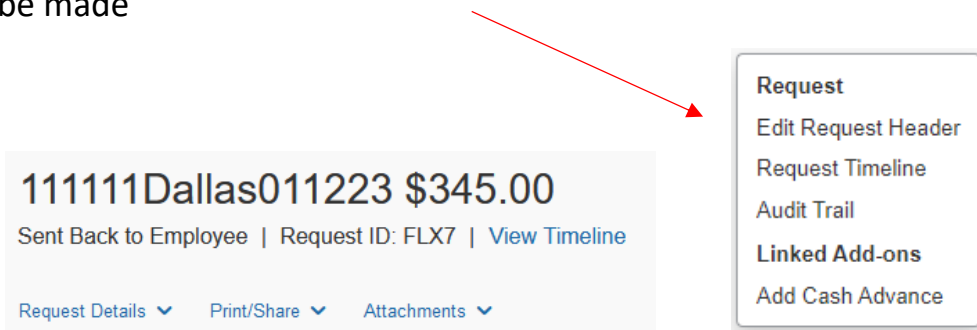
Cancel

Create Request

## Expected Expenses

On the Request Header **Click** the drop-down arrow next to Requested Details. The traveler can select from the menu to view the approval flow through Request Timeline, Audit Trail, and the Allocation Summary of the expected expenses.

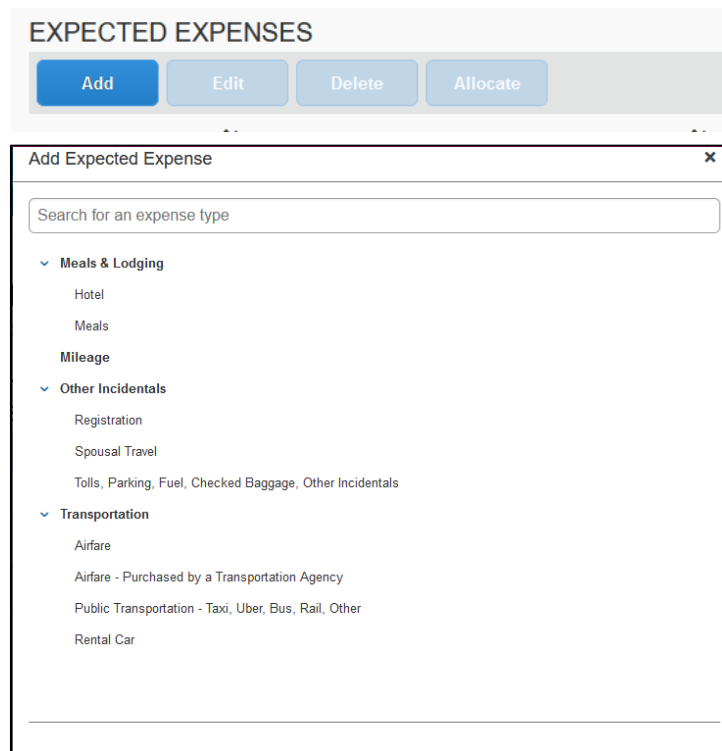
**Clicking** Edit Request Header will return the traveler to the request header so corrections can be made



The screenshot shows a request header card with the following information: "111111Dallas011223 \$345.00", "Sent Back to Employee | Request ID: FLX7 | [View Timeline](#)", and three dropdown menus: "Request Details", "Print/Share", and "Attachments". A red arrow points from the "Request Details" dropdown to a menu that is open, showing the following options: "Request", "Edit Request Header", "Request Timeline", "Audit Trail", "Linked Add-ons", and "Add Cash Advance".

## Adding expected expenses

**Click** Add. A selection of expenses will appear. **Click** on the expense type that will be added to the request.



The screenshot shows the "EXPECTED EXPENSES" section with buttons for "Add", "Edit", "Delete", and "Allocate". Below this is a dialog box titled "Add Expected Expense" with a search bar and a list of expense types:

- Meals & Lodging
  - Hotel
  - Meals
  - Mileage
- Other Incidentals
  - Registration
  - Spousal Travel
  - Tolls, Parking, Fuel, Checked Baggage, Other Incidentals
- Transportation
  - Airfare
    - Airfare - Purchased by a Transportation Agency
  - Public Transportation - Taxi, Uber, Bus, Rail, Other
  - Rental Car

Each expense will be an estimated expense. **Enter** the amount and any comments that may pertain to the expense. Then **Click** save.

New Expense: Airfare  
01/08/2023

Allocate

Travel Start Date: 01/08/2023  
Travel End Date: 01/12/2023

Amount:   
Currency: US, Dollar  
Comment:

Save Cancel

The expected expense will be added to the form, and it will calculate the total expected expenses.

| EXPECTED EXPENSES        |  |               |            |          |            |
|--------------------------|--|---------------|------------|----------|------------|
| Add                      | Edit   | Delete        | Allocate   |          |            |
| Alerts                   | Expense type   | Details       | Date       | Amount   | Requested  |
| <input type="checkbox"/> | Meals  | Dallas, Texas | 01/08/2023 | \$345.00 | \$345.00   |
| <input type="checkbox"/> | Airfare  |               | 01/08/2023 | \$345.00 | \$345.00   |
| <input type="checkbox"/> | Hotel  |               | 01/08/2023 | \$800.00 | \$800.00   |
| <input type="checkbox"/> | Mileage  |               | 01/08/2023 | \$42.58  | \$42.58    |
| <input type="checkbox"/> | Tolls, Parking, Fuel, Checked Baggage, Other Incidentals |               | 01/08/2023 | \$35.00  | \$35.00    |
| <input type="checkbox"/> | Registration   |               | 01/08/2023 | \$250.00 | \$250.00   |
|                          |  |               |            |          | \$1,817.58 |

Once all expected expenses have been entered, upload any back-up documentation including conference agendas, hotel reservations, airfare quotes, mileage and any required approval from the traveler's department, university required documentation or approvals.

Foreign Travel requires both the completed [Export Controls and Travel Embargo Form](#) and CITI ([Collaborative Institute of Training Initiatives](#)) program certificate.

**To upload documents:** Select Attachments above Expected Expenses and then Attach Documents. **Click** Upload and Attach, then select the saved documents on your computer, then open.

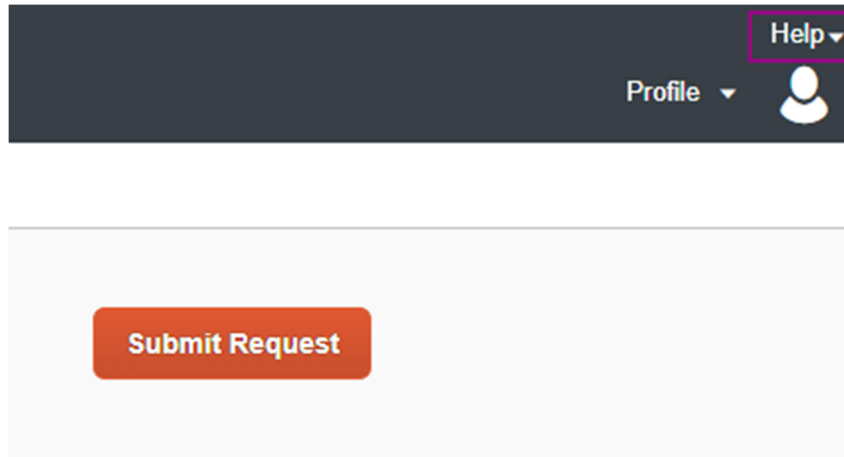
Request Details Print/Share Attachments

EXPECTED EXPENSES

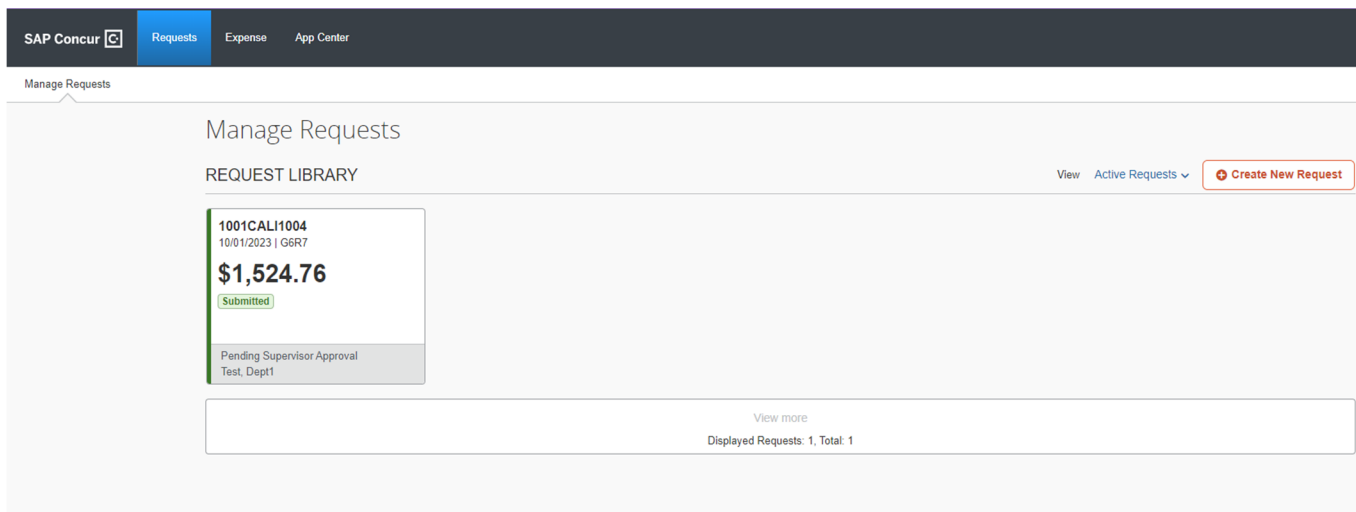
Attach Documents

# Submit Request

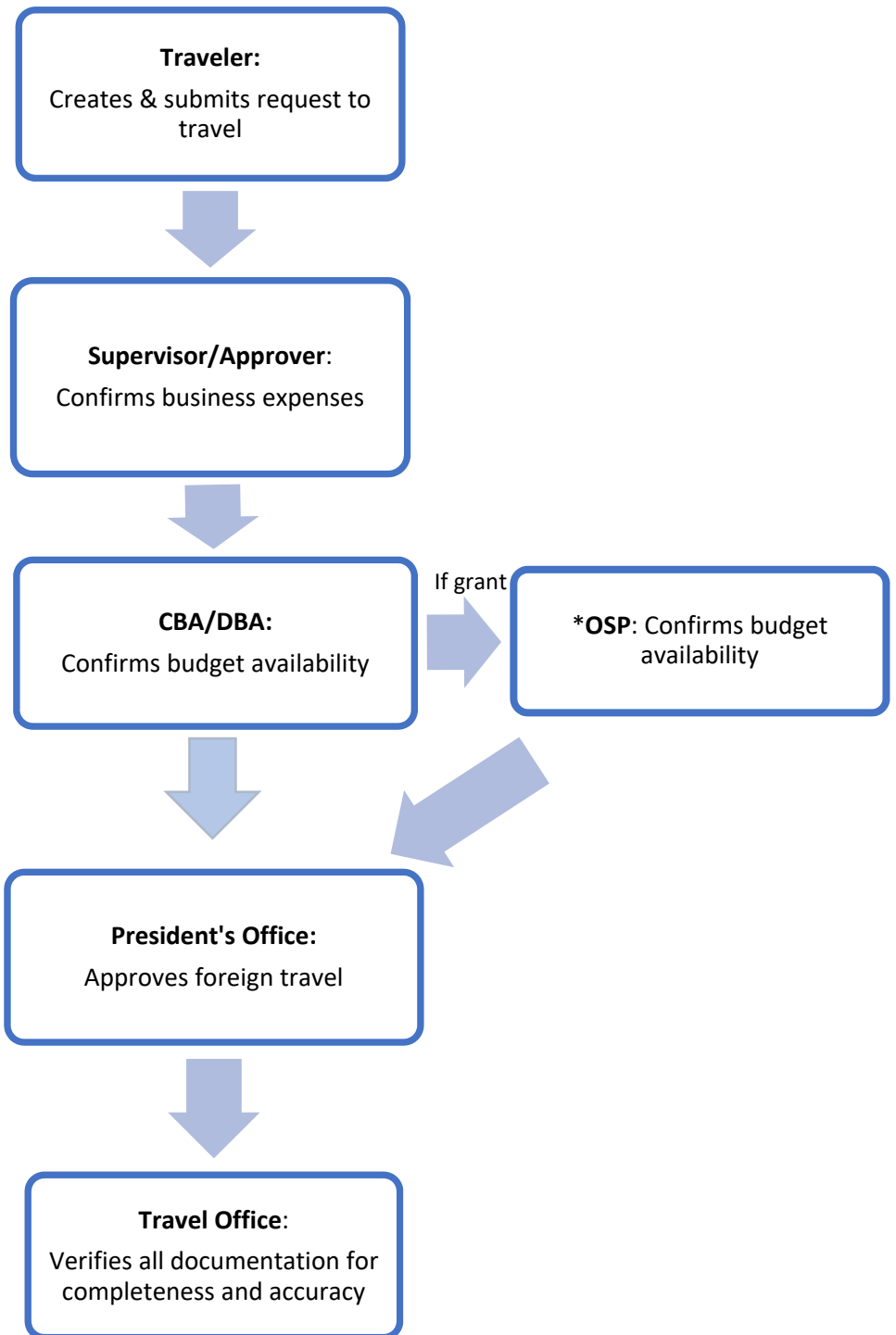
Click Submit Request at the Right top of the form. This will enter the request into the approval workflow.



Requests can be monitored by the traveler to see where it is in the workflow from the Request page. The tiles contain the status.



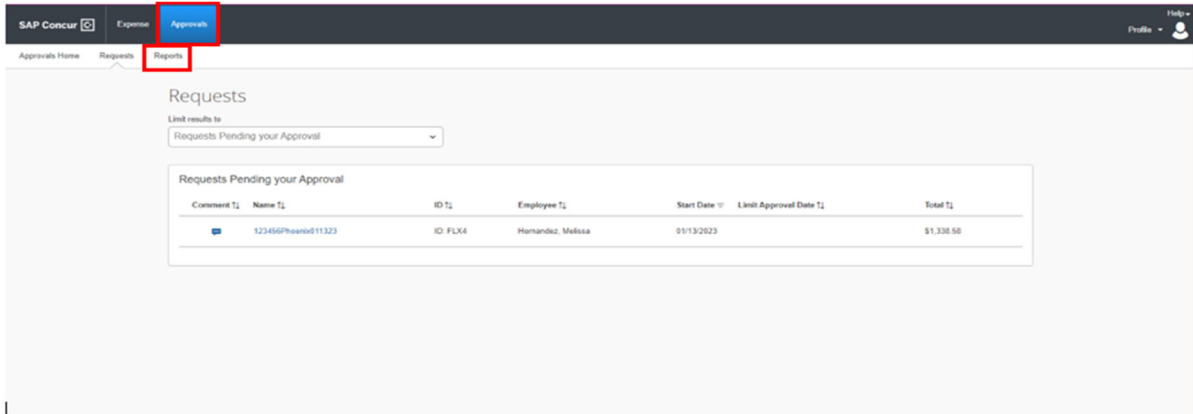
# Request Approval Workflow



\*Concur will only handle Ledger Five Travel. Any Ledger One Travel must be managed through the state of Texas travel site

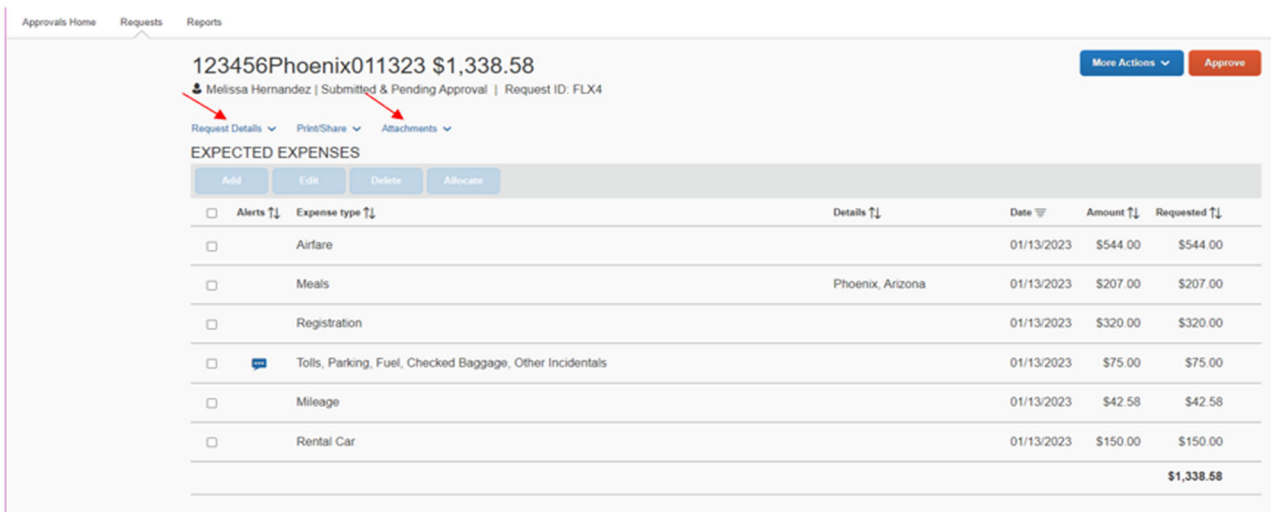
# Request Approval

Click on Approvals then Requests. A list of requests pending approval will appear, then Click on the name of the report



Each reviewer in the workflow must verify the Request Header by **Clicking** Request Details drop-down arrow then selecting Request Header and documents by **Clicking** the Attachments drop-down arrow.

Once reviewed and **Click** Approve and the request will move through the workflow.

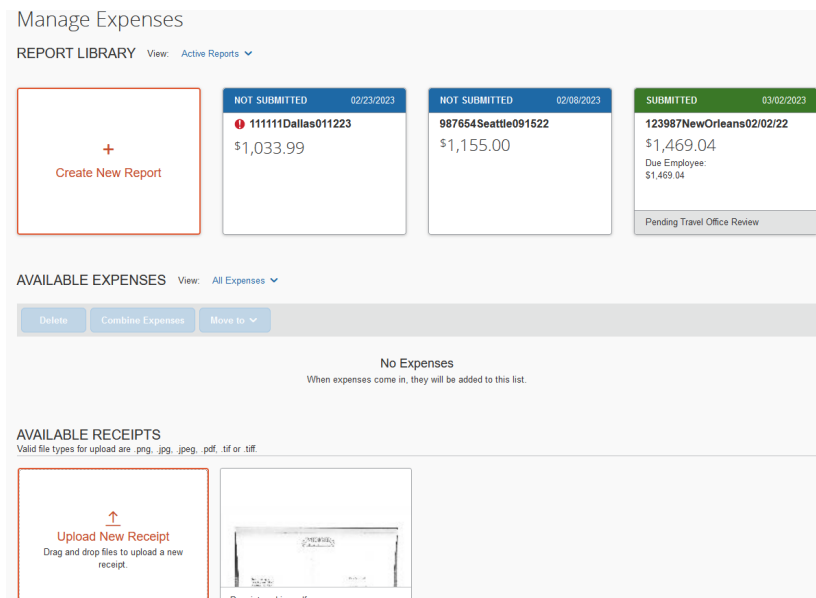
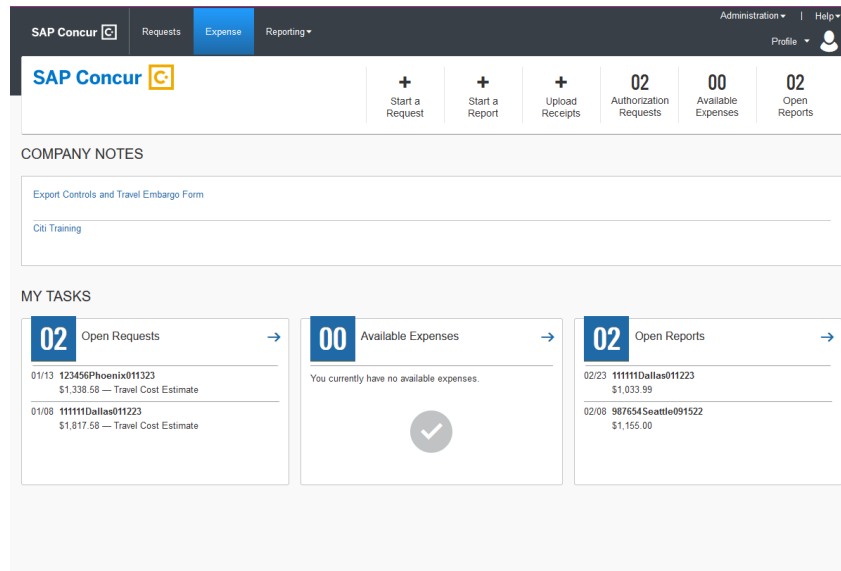


# Expense Reporting

To get to the Expense page **Click** Expense at the top of the page.

On the Expense page you can see:

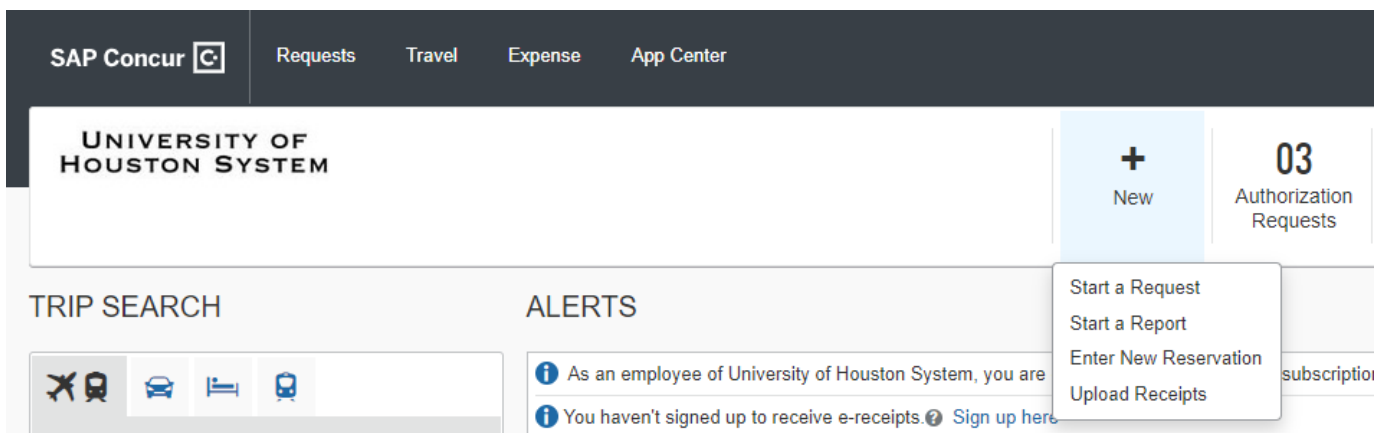
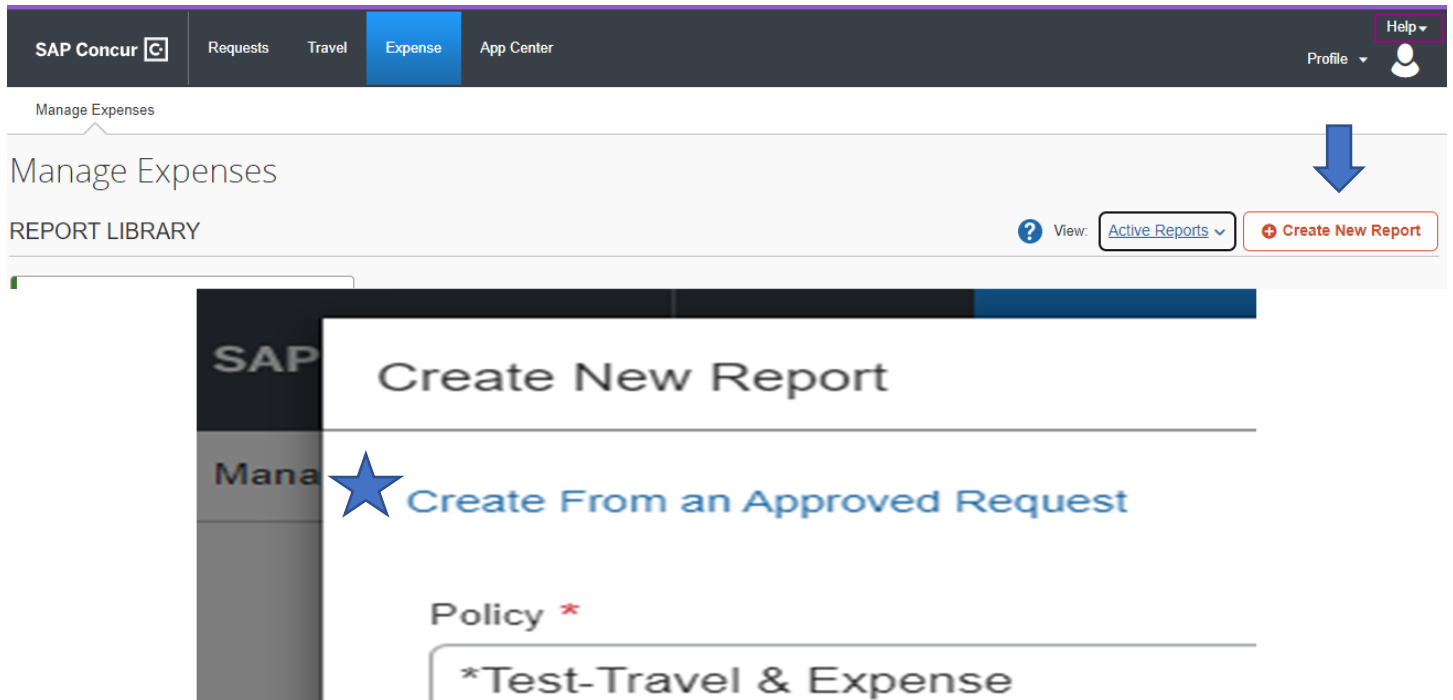
- Expense reports that have and have not been submitted
- Dashboard tiles display expense report(s) status
- Pending travel card expenses that should be applied to a report
- Pending receipts or upload receipts to be applied to future reports



# Report

## Create a new Expense Report

Click Expense, then Start a Report (based upon your initial Travel Request) from the Expense tab and Managing Expenses or create a report on the home page by **Clicking + New** and then Start a Report. **At the top left of the Report header, Click [Create from an Approved Request](#)**★



***A pop-up box will appear listing available approved invoices to choose from to create an expense report. Select the report by selecting on the left side of the report Request Name and then Create Report.***



## Calculated Travel Allowance for Daily GSA (General Services Administration) Lodging and Meals.

An Itinerary must be completed before entering expenses so Concur can calculate the appropriate daily GSA rates.

Begin entering the travel itinerary by **Clicking** Travel Allowance then **Click** Manage Travel A

The screenshot displays the SAP Concur Expense Reporting interface. At the top, the navigation bar includes 'SAP Concur', 'Requests', 'Expense', and 'Reporting'. The 'Expense' tab is active. The main content area shows a report titled '111111Dallas011223 \$0.00' with a status of 'Not Submitted' and 'Report Number: BW1HL0'. A red arrow points to the 'Travel Allowance' dropdown menu. Below this, a box displays 'REQUEST Approved \$1,817.58'. A toolbar contains buttons for 'Add Expense', 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. The main area is currently empty, displaying 'No Expenses' and a prompt to 'Add expenses to this report to submit for reimbursement.' The footer includes the SAP logo, 'Service Status (US2)', 'Cookie Preferences', 'SAP Concur', and 'Last signed in: 02/23/2023 01:57 pm'.

At the top left of the form **Click Create New Itinerary.**

Travel Allowances For Report: 11111Dallas011223

Create New Itinerary Available Itineraries

Assigned Itineraries

| Departure City                | Date and Time | Arrival City | Date and Time | Arrival Rate Location |
|-------------------------------|---------------|--------------|---------------|-----------------------|
| No Assigned Itineraries Found |               |              |               |                       |

Available Itineraries

| Departure City                             | Date and Time       | Arrival City           | Date and Time       | Arrival Rate Location     |
|--|---------------------|------------------------|---------------------|---------------------------|
| <b>Itinerary: 1234565SanAntonio012923</b>  |                     |                        |                     |                           |
| Houston, Texas                             | 01/24/2023 08:00 AM | San Antonio, Texas     | 01/24/2023 01:00 PM | BEXAR COUNTY, US-TX, US   |
| San Antonio, Texas                         | 01/29/2023 03:30 PM | Houston, Texas         | 01/29/2023 08:30 PM | HARRIS COUNTY, US-TX, US  |
| <b>Itinerary: 123987NewOrleans02/02/22</b> |                     |                        |                     |                           |
| Houston, Texas                             | 01/30/2023 11:00 AM | New Orleans, Louisiana | 01/30/2023 01:20 PM | ORLEANS PARISH, US-LA, US |
| New Orleans, Louisiana                     | 02/02/2023 05:26 PM | Houston, Texas         | 02/02/2023 07:00 PM | HARRIS COUNTY, US-TX, US  |

Previous Done

## Itinerary Information

Enter *Departure City*, the Date (MM/DD/YYYY), and Time **EX:(6:00 AM) (12:00 PM)**

Enter *Arrival City*, the Date (MM/DD/YYYY), and Time **(1:00 PM) (8:00 PM)**

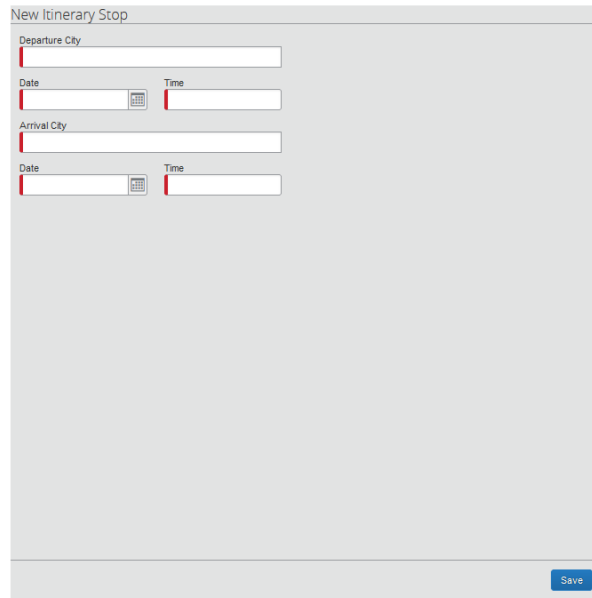
Click Save at the bottom right.

The next form will pop up and will look identical to the previous. This form will be for **Returning** information or travel to a different city.

**Complete** the form by including the Departure City, Date and Time and the Arrival City, Date, and Time.

If your travel is to **multiple cities**, this step will need to be **completed for each segment**.

The saved trip segments appear on the left side of the screen and can be edited by **Clicking** on the row of the segment that needs editing

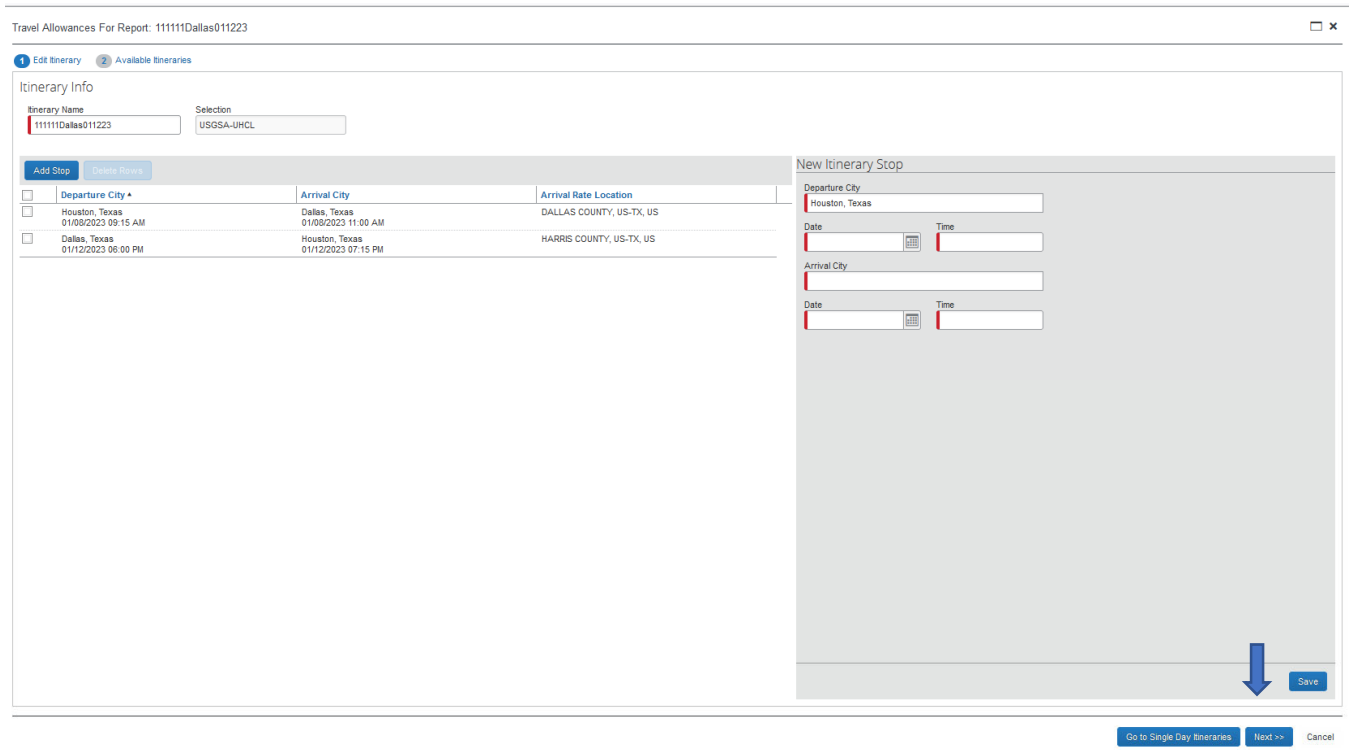


A form titled "New Itinerary Stop" with the following fields:

- Departure City:
- Date:
- Arrival City:
- Date:

Buttons:

Once all trip segments have been entered **Click** next at the bottom right of the form.



Travel Allowances For Report: 111111Dallas011223

1 Edit Itinerary 2 Available Itineraries

Itinerary Info

Itinerary Name: 111111Dallas011223 Selection: USGSA-UHCL

| Departure City   | Arrival City                          | Arrival Rate Location    |
|--|---------------------------------------|--------------------------|
| <input type="checkbox"/> Houston, Texas<br>01/09/2023 09:15 AM | Dallas, Texas<br>01/09/2023 11:00 AM  | DALLAS COUNTY, US-TX, US |
| <input type="checkbox"/> Dallas, Texas<br>01/12/2023 06:00 PM  | Houston, Texas<br>01/12/2023 07:15 PM | HARRIS COUNTY, US-TX, US |

New Itinerary Stop

Departure City:

Date:

Arrival City:

Date:

The Travel Itinerary has been added to Assigned Itineraries, **Click Done** at the bottom right of the screen.

Travel Allowances For Report: 111111Dallas011223



Create New Itinerary Available Itineraries Reimbursable Allowances Summary

Assigned Itineraries

| Assigned Itineraries          |                     |                |                     |                          |
|-------------------------------|---------------------|----------------|---------------------|--------------------------|
| Departure City                | Date and Time       | Arrival City   | Date and Time       | Arrival Rate Location    |
| Itinerary: 111111Dallas011223 |                     |                |                     |                          |
| Houston, Texas                | 01/08/2023 09:15 AM | Dallas, Texas  | 01/08/2023 11:00 AM | DALLAS COUNTY, US-TX, US |
| Dallas, Texas                 | 01/12/2023 06:00 PM | Houston, Texas | 01/12/2023 07:15 PM | HARRIS COUNTY, US-TX, US |

Available Itineraries

| Available Itineraries               |                     |                        |                     |                           |
|-------------------------------------|---------------------|------------------------|---------------------|---------------------------|
| Current Itineraries                 | Delete              | Assign                 |                     |                           |
| Departure City                      | Date and Time       | Arrival City           | Date and Time       | Arrival Rate Location     |
| Itinerary: 1234565SanAntonio012923  |                     |                        |                     |                           |
| Houston, Texas                      | 01/24/2023 08:00 AM | San Antonio, Texas     | 01/24/2023 01:00 PM | BEXAR COUNTY, US-TX, US   |
| San Antonio, Texas                  | 01/29/2023 03:30 PM | Houston, Texas         | 01/29/2023 08:30 PM | HARRIS COUNTY, US-TX, US  |
| Itinerary: 123987NewOrleans02/02/22 |                     |                        |                     |                           |
| Houston, Texas                      | 01/20/2023 11:00 AM | New Orleans, Louisiana | 01/20/2023 01:20 PM | ORLEANS PARISH, US-LA, US |
| New Orleans, Louisiana              | 02/02/2023 05:28 PM | Houston, Texas         | 02/02/2023 07:00 PM | HARRIS COUNTY, US-TX, US  |

Done

# Add Each Expense Type

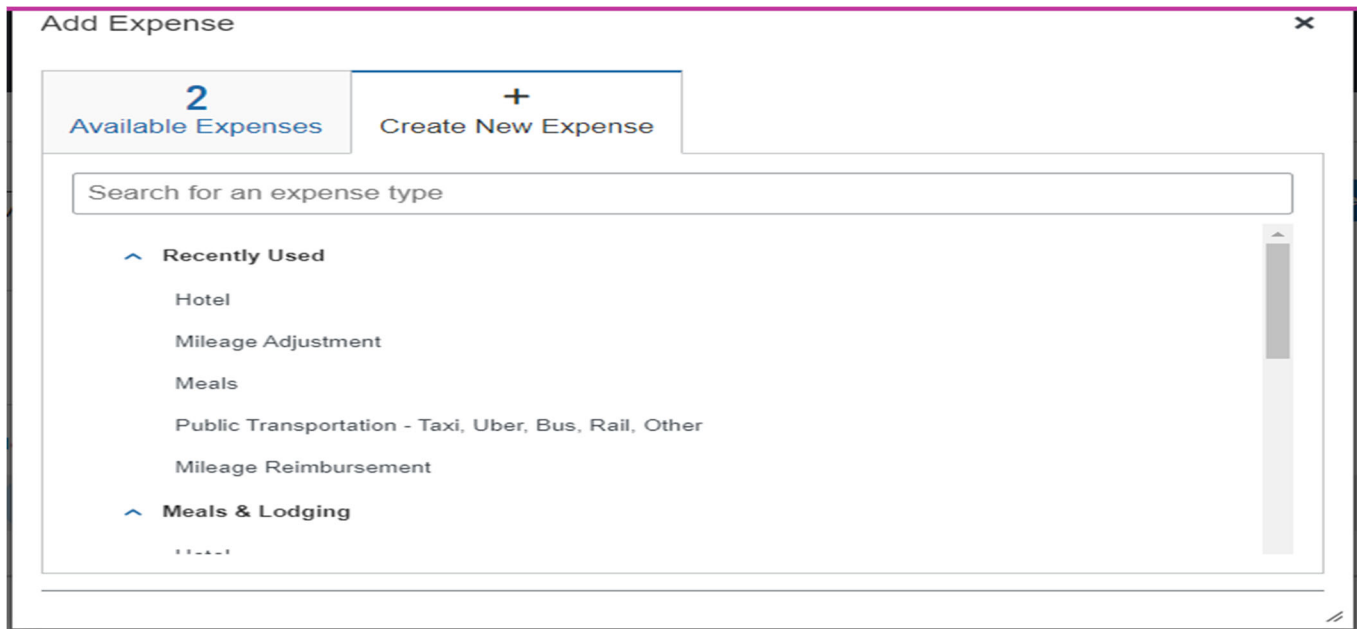
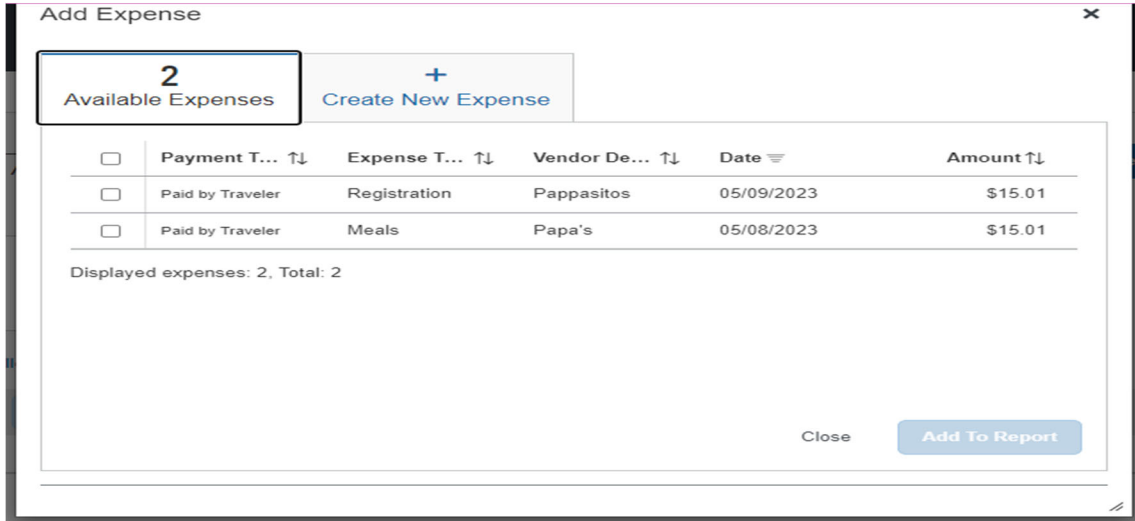
Begin adding expenses by **Clicking** Add Expense

The screenshot displays the SAP Concur Expense report interface. At the top, the navigation bar includes 'SAP Concur', 'Requests', 'Expense' (highlighted), and 'Reporting'. On the right, there are links for 'Administration', 'Help', and 'Profile'. Below the navigation bar, the report ID '111111Dallas011223' and amount '\$0.00' are shown, along with a 'Delete Report' button and a 'Submit Report' button. The status is 'Not Submitted' with 'Report Number: BW1HL0'. There are three dropdown menus: 'Report Details', 'Manage Receipts', and 'Travel Allowance'. A 'REQUEST' box shows 'Approved \$1,817.58'. Below this is a row of action buttons: 'Add Expense', 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. The main content area displays 'No Expenses' and the instruction 'Add expenses to this report to submit for reimbursement.' The footer contains the SAP logo, 'SAP Concur', 'Service Status (US2)', 'Cookie Preferences', 'Last signed in: 02/23/2023 01:57 pm', and '© Copyright 2023 - SAP Concur - All Rights Reserved'.

If there are saved receipts in the Traveler’s Wallet or Travel Card charges available to be added to a report, the traveler will see a box pop up. The traveler can choose to add an available expense by selecting the expense and then **Clicking** Add to Report.

To add a new Expense, **Click** on the tab **+ Create New Expense**.

The traveler will be prompted to select an expense type from the list.



# Airfare Expense

Enter Date of Purchase, Vendor name, City of Purchase, Payment Type and Amount of Purchase

Then **Click** add receipt

SAP Concur | Requests | Travel | Expense | App Center | Profile | Help

Manage Expenses

### New Expense

Cancel Save Expense Hide Receipt

Allocate

Expense Type \* \* Required field  
Airfare

Traveler Type \* Employee Travel Type \* In-State

Transaction Date \* 01/12/2023 Vendor \* American Airlines

City of Purchase Houston, Texas Ticket Number 1A84C3

Payment Type \* Paid by Traveler

Amount \* 134.15 Currency \* US, Dollar

Request \* 01/08/2023, \$345.00 - 1111111Dallas011223

Comment

Save Expense Save and Add Another Cancel

Click to upload or drag and drop files to upload a new receipt.  
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.  
5MB limit per file.

**Click** upload New Receipt and use a previously scanned receipt or a saved receipt from the Traveler's Wallet, then **select** the saved receipt.

Attach Receipt

Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.

Upload New Receipt  
Drag and drop files to upload a new receipt.

6\_Redacted.pdf  
Uploaded: 02/24/2023 8:14 PM

Attach View

Close

Once the receipt has been attached, **Click Save Expense**

**New Expense** Cancel **Save Expense**

Details **Itemizations** Hide Receipt

**Allocate** \* Required field

Expense Type \*  
Airfare

Traveler Type \*  
Employee

Travel Type \*  
In-State

Transaction Date \*  
12/12/2022

Vendor \*  
American Airlines

City of Purchase  
Houston, Texas

Ticket Number  
14B4C3

Payment Type \*  
Paid by Traveler

Amount \*  
134.15

Currency \*  
US, Dollar

Approved Amount

Request \*  
01/08/2023, \$345.00 - 11111Dall...

Comment

**Save Expense** **Save and Add Another** Cancel

American Airlines

Issued: October 3, 2022

Your trip confirmation and re

Save time with the American app

**Record Locator: AOPCKD**

We charged \$349.70 to your card ending in 1912 for your

You can check in via the American app 24 hours before your flight mobile boarding pass.

Manage your trip

Saturday, October 8, 2022

6\_Redacted.pdf

Remove



# Hotel Expense

Enter Check-in and Check-out Dates, Vendor name, City of Purchase and Amount (total amount paid)

Click add receipt

### New Expense

Cancel Save Expense

Details Itemizations Hide Receipt

**\* Required field**

Expense Type \*  
Hotel

Traveler Type \*  
Employee

Travel Type \*  
In-State

Check-in Date \*  
MM/DD/YYYY

Check-out Date \*  
12/12/2022

Nights:  
0

Transaction Date \*  
12/12/2022

Vendor \*  
Search for Vendor

City of Purchase \*  
Houston, Texas

Payment Type \*  
Paid by Traveler

Amount \*

Currency \*  
US, Dollar

GSA Hotel Allowance

Request \*  
01/08/2023, \$800.00 - 111111Dall...

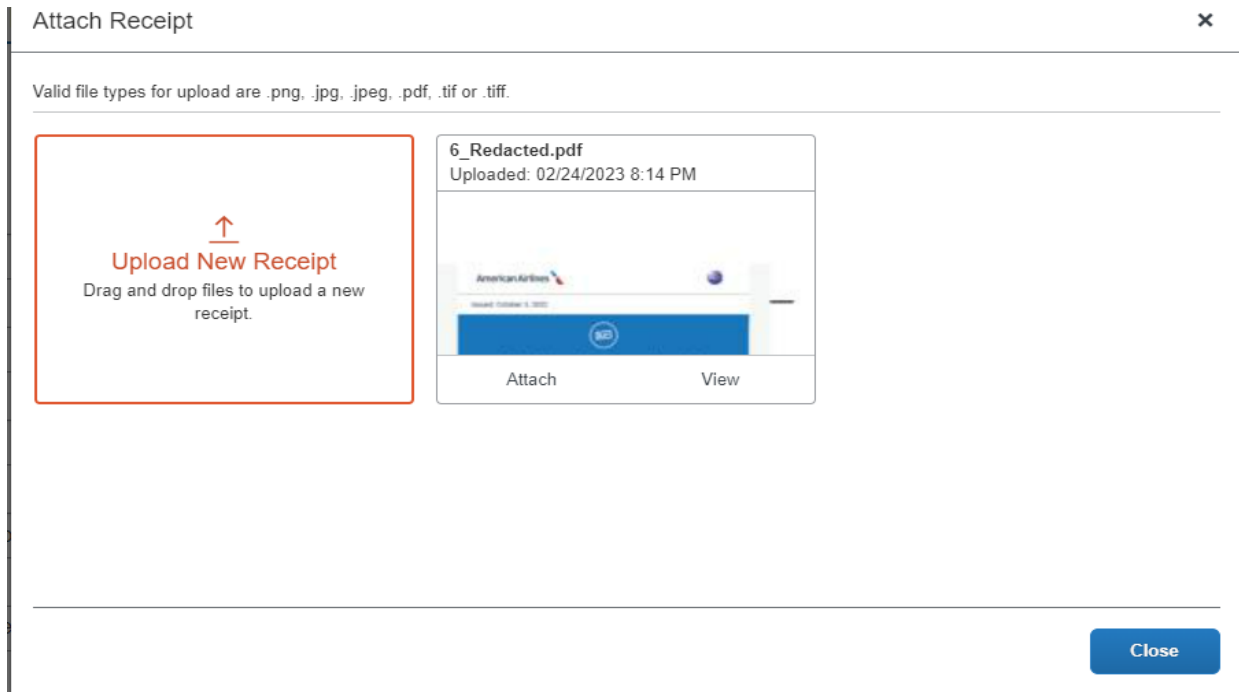
Comment

Save Expense Save and Add Another Cancel

↑  
Add Receipt

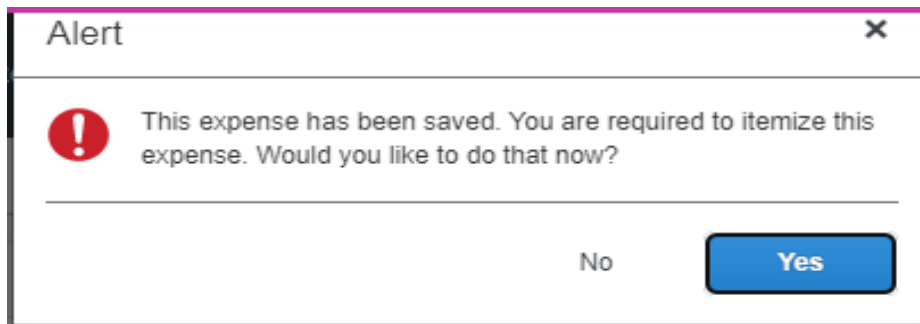
Click to upload or drag and drop files to upload a new receipt.  
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.  
5MB limit per file.

**Click** upload New Receipt and use a previously scanned receipt or a saved receipt from the traveler’s wallet, then **select** the saved receipt.



**Click** Save Expense

The system will pop a box advising the hotel charge will need to be itemized. **Click** Yes.



The hotel will need to be itemized for **each night** of hotel stay. There are two tabs toward the middle of the form. Select the tab according to how the charges will be entered in.

**The Same Every Night** – The rates for each night *are* charged the same.

- **Enter** the Room Rate per night.
- **Enter** the tax per night. Taxes and fees can be entered under Room Tax.

Entry Type: Recurring Itemization 01/08/2023 - 01/12/2023 (Nights: 4)

Your hotel room rate was:

The Same Every Night
Not the Same

| Room Rate (per night) *                  | Room Tax (per night)                     | Tax 2 (per night)                        | Tax 3 (per night)                        |
|--|--|--|--|
| <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> |

*(Amounts in USD)* [Add Tax Fields](#)

Save Itemization Cancel

**Not the Same** – The rates for each night are *not* charged the same including taxes/fees

- **Enter** the Room Rate **per night**.
- **Enter** the tax **per night**. Taxes and fees can be entered under Room Tax.

Entry Type: Recurring Itemization 01/08/2023 - 01/12/2023 (Nights: 4)

Your hotel room rate was:

The Same Every Night
Not the Same

| Date       | Room Rate *                              | Room Tax                                 | Tax 2                                    | Tax 3                                    |
|------------|--|--|--|--|
| 01/08/2023 | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> |
| 01/09/2023 | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> |
| 01/10/2023 | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> |
| 01/11/2023 | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> |

*(Amounts in USD)* [Add Tax Fields](#)

Save Itemization Cancel

Once the itemizations have been entered, **Click** Save Itemization.

Concur will calculate the itemization and a listing of the expenses that were entered for hotel and hotel taxes will appear. At the top, is the total amount entered for the expense, the itemized total, and any remaining amounts that have not been accounted for.

Details | Itemizations | Hide Receipt

Amount: \$1,155.00 | Itemized: \$1,155.00 | Remaining: \$0.00

Create Itemization | More Actions

| <input type="checkbox"/> | Date       | Expense Type | Requested |
|--------------------------|------------|--------------|-----------|
| <input type="checkbox"/> | 09/08/2022 | Hotel Tax    | \$40.00   |
| <input type="checkbox"/> | 09/08/2022 | Hotel        | \$125.00  |
| <input type="checkbox"/> | 09/09/2022 | Hotel Tax    | \$40.00   |
| <input type="checkbox"/> | 09/09/2022 | Hotel        | \$125.00  |
| <input type="checkbox"/> | 09/10/2022 | Hotel Tax    | \$40.00   |
| <input type="checkbox"/> | 09/10/2022 | Hotel        | \$125.00  |
| <input type="checkbox"/> | 09/11/2022 | Hotel Tax    | \$40.00   |
| <input type="checkbox"/> | 09/11/2022 | Hotel        | \$125.00  |
| <input type="checkbox"/> | 09/12/2022 | Hotel Tax    | \$40.00   |
| <input type="checkbox"/> | 09/12/2022 | Hotel        | \$125.00  |
| <input type="checkbox"/> | 09/13/2022 | Hotel Tax    | \$40.00   |
| <input type="checkbox"/> | 09/13/2022 | Hotel        | \$125.00  |
| <input type="checkbox"/> | 09/14/2022 | Hotel Tax    | \$40.00   |
| <input type="checkbox"/> | 09/14/2022 | Hotel        | \$125.00  |

Add Receipt

Click to upload or drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.

**\*\* There should Not be a Remaining Amount. An error will appear. Verify that all itemized amounts are correct.**



**!** The itemization amounts do not add up to the expense amount. [View](#)

Hotel \$700.00

09/23/2022 | Omni Hotels

Details | Itemizations

Amount: \$700.00 | Itemized: \$675.00 | Remaining: \$25.00 **★**

Adjust any amounts that are not correct by **Clicking** on the itemized expense. If an additional itemization needs to be added, **Click** Create Itemization.

| Amount   | Itemized | Remaining |
|----------|----------|-----------|
| \$700.00 | \$675.00 | \$25.00   |

| Create Itemization       |            | More Actions |           |
|--------------------------|------------|--------------|-----------|
| <input type="checkbox"/> | Date       | Expense Type | Requested |
| <input type="checkbox"/> | 09/16/2022 | Hotel        | \$75.00   |
| <input type="checkbox"/> | 09/16/2022 | Hotel Tax    | \$25.00   |
| <input type="checkbox"/> | 09/17/2022 | Hotel        | \$75.00   |

A form will appear, adjust the amount, and then **Click** save itemization.

| Amount   | Itemized | Remaining |
|----------|----------|-----------|
| \$700.00 | \$675.00 | \$25.00   |

Hotel Tax \$25.00

Allocate \* Required field

Expense Type \*

Traveler Type \*       Travel Type \*

Transaction Date \*       Enter Vendor Name

City of Purchase

Amount \*       Currency

Approved Amount        Travel Allowance

Comment

Once all amounts have been itemized, at the top right of the form **Click** Save Expense.

# Mileage Expense

Enter **From** Location and **To** Location then **Click Mileage Calculator**.

**Comments** - For blanket mileage (local only) specify the purpose of each trip.

**\*This is a very intuitive app. Entry can be by common destination names such as airports, schools, convention centers, landmarks, etc. (Examples: Dallas Convention Center, Minute Maid Park, Hobby Airport) or by address.**

The screenshot shows a web form titled "Mileage Calculator" with a sub-header "Allocate". The form includes several input fields and dropdown menus:

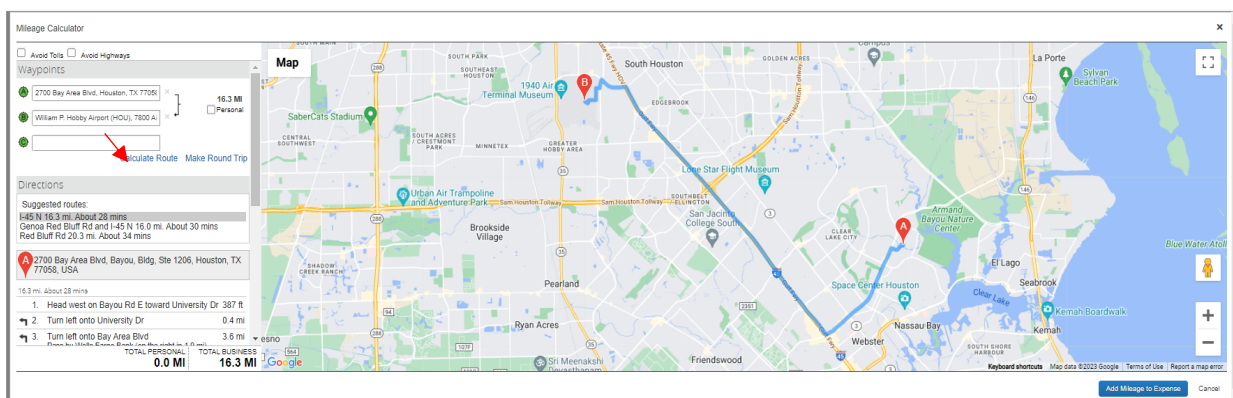
- Expense Type \***: A dropdown menu with "Mileage Reimbursement" selected.
- Traveler Type \***: A dropdown menu with "Employee" selected.
- Travel Type \***: A dropdown menu with "In-State" selected.
- Transaction Date \***: A date field with "01/08/2023" entered.
- From Location \***: A text field with "UHCL" entered.
- To Location \***: A text field with "Hobby Airport" entered.
- Payment Type**: A dropdown menu with "Paid by Traveler" selected.
- Approved Amount**: An empty text field.
- Business Unit**: A dropdown menu with "(00759) Univ. of Houston - Clea..." selected.
- Request \***: A dropdown menu with "01/08/2023, \$42.58 - 11111..." selected.
- Comment**: A large empty text area.
- Distance \***: A text field with "0" entered.
- Amount**: A text field with "0.00" entered.
- Currency**: A dropdown menu with "US, Dollar" selected.
- Reimbursement Rates**: A text field with "USD 0.625 per mile" entered.

At the bottom of the form, there are three buttons: "Save Expense", "Save and Add Another", and "Cancel".

Enter departure address and destination address.

If the trip is a round trip, then **Click Make Round Trip** and it will add the return address to match the departure address.

**Multiple Stops** – add additional stops as needed and the calculator will calculate total mileage.



Once all stops have been entered **Click Add Mileage to Expense**.

**Click Save Expense**

# Public Transportation Expense

Enter Transaction Date, Enter Vendor Name, City of Purchase, and Amount. In Comment, add a note detailing the charge. **Example:** Uber from airport to hotel; taxi to convention center, subway pass, etc.

The screenshot shows the 'New Expense' form with the 'Details' tab selected. The form includes fields for Expense Type (Public Transportation - Taxi, Uber, Bus, Rail, Other), Traveler Type (Employee), Travel Type (In-State), Transaction Date (01/12/2023), Enter Vendor Name, City of Purchase, Payment Type (Paid by Traveler), Amount, Currency (US, Dollar), Approved Amount, and Comment. A large red-bordered box on the right side of the form highlights the 'Add Receipt' area, which contains an 'Add Receipt' button and instructions: 'Click to upload or drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.'

Click Add Receipt

Click Upload New Receipt and use a previously scanned receipt or a saved receipt from the traveler's wallet, then **select** the saved receipt.

The screenshot shows the 'Attach Receipt' dialog box. It includes a text prompt: 'Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.' On the left, there is an 'Upload New Receipt' button with an upward arrow icon and the text 'Drag and drop files to upload a new receipt.' On the right, there is a list of receipts. The first item is '6\_Redacted.pdf', uploaded on 02/24/2023 at 8:14 PM. Below the filename is a small thumbnail of the receipt, which appears to be an American Airlines boarding pass. Below the thumbnail are 'Attach' and 'View' buttons. A 'Close' button is located at the bottom right of the dialog box.

# Registration Expense

Enter Transaction date, Vendor name, City of Purchase, and Amount

\* The traveler must have other expenses in addition to registration to be reimbursed through travel. If there are no expenses, then the department will reimburse on a departmental voucher.

Click Save Expense

The screenshot shows the 'New Expense' form with the 'Details' tab selected. The form contains the following fields and options:

- Expense Type \***: Registration
- Traveler Type \***: Employee
- Travel Type \***: In-State
- Transaction Date \***: 01/13/2023
- City of Purchase**: Dallas, Texas
- Amount \***: (empty)
- Approved Amount**: (empty)
- Enter Vendor Name**: (empty)
- Payment Type \***: Paid by Traveler
- Currency \***: US, Dollar
- Request \***: 01/08/2023, \$250.00 - 111111Dall...
- Comment**: (empty text area)

A large red box highlights the 'Add Receipt' button and the instructions: 'Click to upload or drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.'

Click add receipt

Click upload New Receipt and use a previously scanned receipt or a saved receipt from the traveler's wallet, then **select** the saved receipt.

The screenshot shows the 'Attach Receipt' dialog box. It contains the following elements:

- Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.**
- Upload New Receipt** button (highlighted with a red box).
- 6\_Redacted.pdf** (Uploaded: 02/24/2023 8:14 PM) with a thumbnail and 'Attach' and 'View' buttons.
- Close** button at the bottom right.



## Incidental Expenses

Enter Transaction date, Vendor Name, City of Purchase, Amount and Comment detailing charge.

Below is a list of some common, reimbursable incidental expenses:

- Fuel for rental car
- Parking fees
- Tolls
- Medical evacuation insurance
- Passport, Visa, Inoculations for foreign travel
- Laundry services for trips longer than 1 week
- Postage for business
- Currency exchange fee
- Tools or supplies necessary to conduct business (i.e.: office supplies, postage)

If you have questions regarding incidental expenses not listed, please email [traveloffice@uhcl.edu](mailto:traveloffice@uhcl.edu).

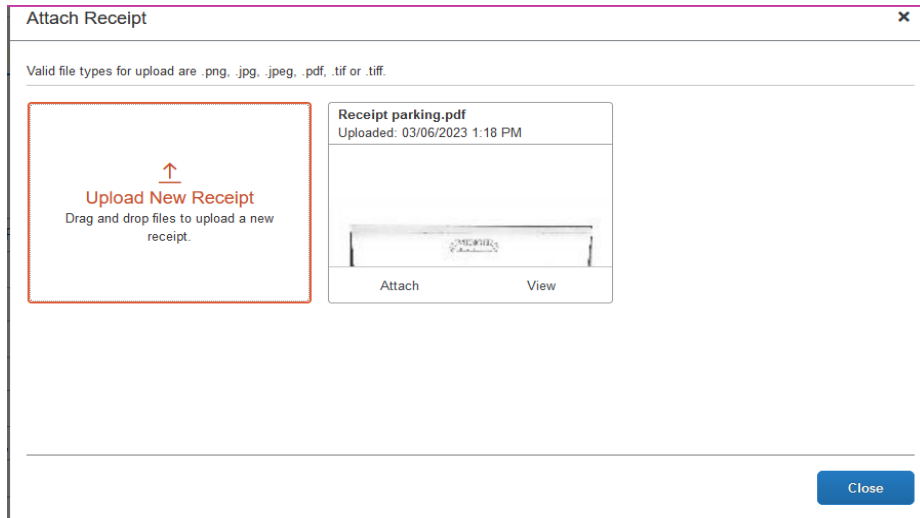
Click add receipt

The screenshot shows a 'New Expense' form with the following fields and values:

- Expense Type \***: Tolls, Parking, Fuel, Checked Baggage, Other Incidentals
- Traveler Type \***: Employee
- Travel Type \***: In-State
- Transaction Date \***: 03/06/2023
- Enter Vendor Name**: Menger Hotel
- City of Purchase**: Dallas, Texas
- Payment Type \***: Paid by Traveler
- Amount \***: 27.06
- Currency \***: US, Dollar
- Approved Amount**: (empty)
- Request \***: 01/08/2023, \$35.00 - 111111Dalla...
- Comment**: Parking at hotel

At the bottom of the form, there are buttons for 'Save Expense', 'Save and Add Another', and 'Cancel'. On the right side, a large red-bordered box contains an 'Add Receipt' button and the following text: 'Click to upload or drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.'

Click upload New Receipt and use a previously scanned receipt or a saved receipt from the traveler's wallet, then **select** the saved receipt.

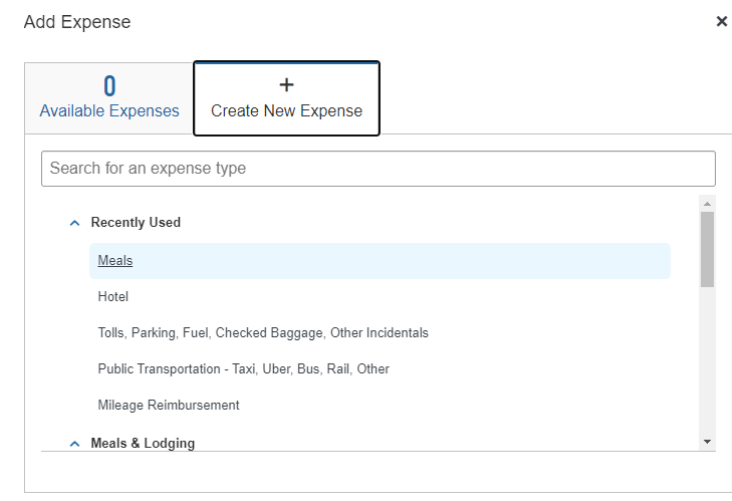


## Meal Expense

Concur will calculate daily spending and will reimburse actual expenses up to the daily per diem rates. If a traveler exceeds daily per diem, they will not be reimbursed for any overages.

The daily per diem rates can be found at: <https://www.gsa.gov/travel/plan-book/per-diem-rates>

To create a new Meal Expense **Click** Add Expense, **select** Meals



**Enter** Transaction date, Vendor Name, City of Purchase, total meal expense, including tip and Amount. The box for GSA (General Services Administration) Meal Allowance must be checked. **Click** Save Expense.

The screenshot shows the 'New Expense' form with the following fields and values:

- Expense Type \***: Meals
- Traveler Type \***: Employee
- Travel Type \***: In-State
- Transaction Date \***: 03/11/2023
- Enter Vendor Name**: Piping Hot Pizza
- City of Purchase \***: Dallas, Texas
- Payment Type \***: Paid by Traveler
- Amount \***: 16.02
- Currency \***: US, Dollar
- Request \***: 01/08/2023, \$345.00 - 111111Dall...
- GSA Meal Allowance**
- Comment**: (Empty text area)

At the bottom of the form are three buttons: **Save Expense**, **Save and Add Another**, and **Cancel**. To the right of the form is a large red-bordered box containing an **Add Receipt** button and instructions: 'Click to upload or drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.'

A prompt will appear informing the traveler that the charge must be itemized.

The alert dialog box has a title bar with the word 'Alert' and a close button (X). The main content area contains a red exclamation mark icon followed by the text: 'This expense has been saved. You are required to itemize this expense. Would you like to do that now?'. At the bottom of the dialog are two buttons: 'No' and 'Yes'.

**Click** Yes.

The itemization form below will appear to distinguish meal expense from tip amount.

**Enter** the amounts for Tip/Gratuities. If there is no tip amount, then enter 0.00. **Click** Save Itemization.

***\*Tip/Gratuities** –Tips cannot exceed 20% of the meal expense. The total of the meal and the tip is calculated toward the daily GSA Meal Allowance for reimbursement.*

The remaining balance represents the meal cost.

**Example:** Traveling to Corpus Christi, the traveler has a total allowance of \$64 daily. Concur will calculate the total meal purchases for each day and the traveler will be reimbursed for actual expenses up to \$64. Any amount over \$64 will not be reimbursed.

The screenshot shows a web form titled "Meals \$16.02" with a date of "03/11/2023" and a description of "Piping Hot Pizza". The form has two tabs: "Details" and "Itemizations". In the "Details" tab, there is a summary table:

| Amount  | Itemized | Remaining |
|---------|----------|-----------|
| \$16.02 | \$0.00   | \$16.02   |

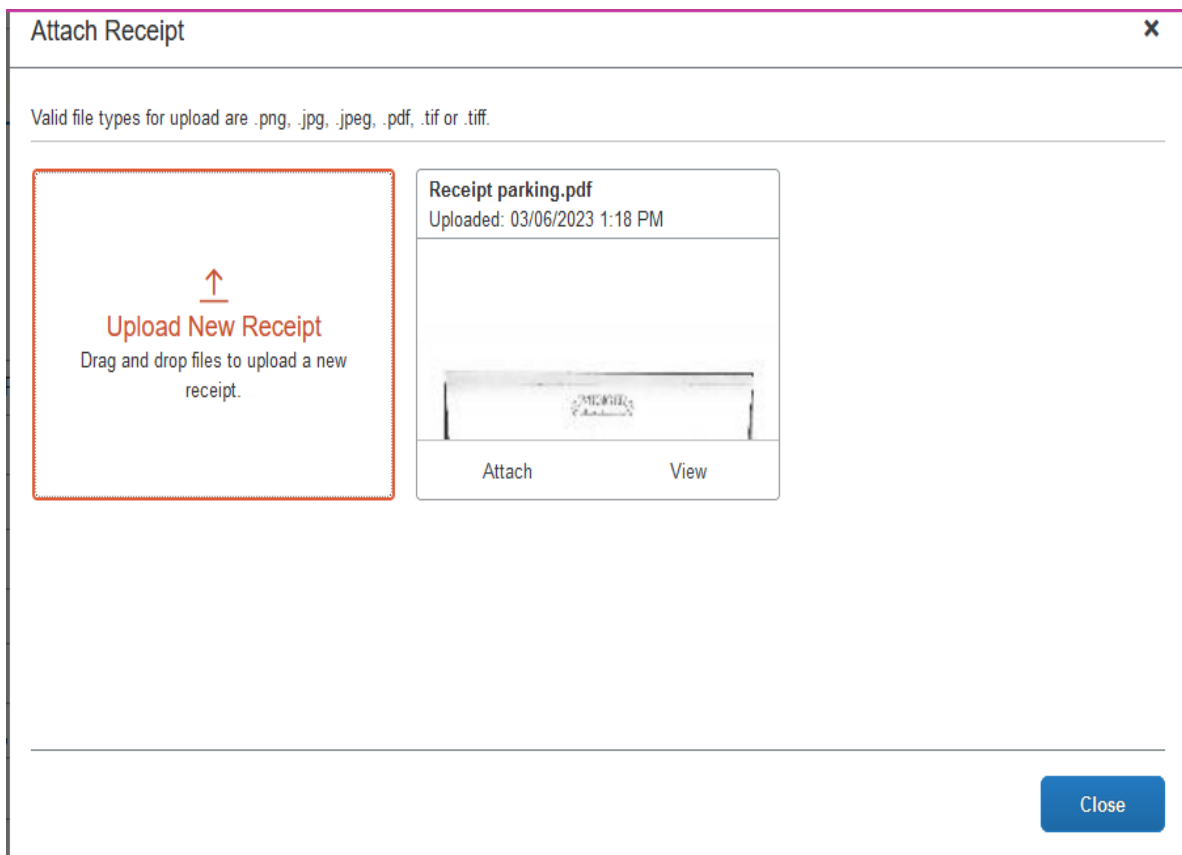
Below the table, there is a section for "Meals/Tips" with a "\* Required field" label. It contains a text input field for "Tips/Gratuities \*", a checkbox for "Personal Expense (do not reimburse)", and a note "(Amounts in USD)". At the bottom of the form, there are "Save Itemizations" and "Cancel" buttons.

On the right side of the form, there is a large red-bordered box for uploading a receipt. It contains an "Add Receipt" button with an upward arrow icon. Below the button, there is text: "Click to upload or drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file."

**Click** add receipt

**Click** upload New Receipt and use a previously scanned receipt or a saved receipt from the traveler’s wallet, then **select** the saved receipt.

**Click** save Itemizations. **Click** Save Expense.



Once all expenses have been entered and all necessary receipts have been uploaded or attached, **Click** Submit Report.

# Reallocating Charges

If a traveler has multiple **Cost Centers** that charges need to be reallocated to, the cost center will have to be changed within the expense.

In the expense form, **Click Allocate**

The screenshot shows an expense form titled "Meals \$13.28" dated 07/14/2022 for McDonald's. The form has two tabs: "Details" (selected) and "Itemizations". A red arrow points to the "Allocate" button in the top left of the "Details" tab. Below the button are several required fields marked with an asterisk (\*):

- Expense Type: Meals
- Traveler Type: Employee
- Travel Type: In-State
- Transaction Date: 07/14/2022
- Enter Vendor Name: McDonald's
- City of Purchase: Austin, Texas
- Payment Type: Paid by Traveler
- Amount: 13.28
- Currency: US, Dollar
- Request: None

There is also a "Comment" text area and "Save Expense" and "Cancel" buttons at the bottom.

**Click Add.**

The screenshot shows the "Allocate" dialog box for the expense. It displays the following information:

- Itemizations: 2 | \$13.28
- Amount: \$13.28
- Allocated: \$13.28 (100%)
- Remaining: \$0.00 (0%)

Below this is a "Default Allocation" section with a table:

| Code    | Percent % |
|---------|-----------|
| Default | 100       |

At the bottom of the dialog, there are buttons for "Add", "Edit", "Remove", and "Save as Favorite". The main area of the dialog is empty, with the text "No Allocations" and a note: "These expenses are assigned to your default allocation shown above. Click the allocate button to allocate part or all of these expenses differently." "Cancel" and "Save" buttons are at the bottom right.

Enter the Cost Center, then **Click Save**.

Add Allocation

New Allocation Favorite Allocations

Project \* NA

Grant Type \* NON-GRANT

Chartfield1 \* (HEERFAA01) Faculty professional dev

Request ID

Cancel Save

Entry can be made by amounts or percent by selecting at the top of the screen.

Percent Amount

Amount | Allocated 100%

The entry can be a partial amount/ percentage, then **Click Save**.

Allocate

Items: 2 | \$13.28 | View Allocation Group

Amount \$13.28 Allocated \$13.28 100% Remaining \$0.00 0%

Default Allocation

Code Default Percent % 0

| Expense Group            | Travel Type | Business Unit | Department                    | Fund Type                 | Fund Code | Program       | Project       | Grant Type | Code      | Percent %   |     |
|--------------------------|-------------|---------------|-------------------------------|---------------------------|-----------|---------------|---------------|------------|-----------|---|-----|
| <input type="checkbox"/> | UHCL        | In-State      | Univ. of Houston - Clear Lake | C0154 BUSINESS OPERATIONS | LOCAL     | DESIG-TUITION | AVP - FINANCE | NA         | NON-GRANT | UHCL-In-State-00759-C0154-LOCAL-2064-F1077-NA-NON-GRANT | 100 |

Cancel Save

## Travel Card Expense

To assign a UHCL Travel Card Expense to a report **Click** Add an expense within the report that has been created. You may also add a personal credit card to your Concur profile and assign specific expenses to it if you prefer to wait for reimbursement.

Select the expense by **Clicking** in the check box next to the expense and then **Click** Add to Report.

**\*\*RECEIPTS ARE REQUIRED FOR BOTH UHCL TRAVEL CARD AND PERSONAL CARD EXPENSES\*\***

### Add Expense ✕

**4**  
Available Expenses + Create New Expense

|                                     |           |           |                                    |            |           |
|-------------------------------------|-----------|-----------|------------------------------------|------------|-----------|
| <input type="checkbox"/>            | Citi Bank | Undefined | COURTYARD<br>BY MARRIOTT<br>Austin | 02/28/2023 | (\$31.93) |
| <input checked="" type="checkbox"/> | Citi Bank | Undefined | COURTYARD<br>BY MARRIOTT<br>Austin | 02/19/2023 | \$112.58  |
| <input type="checkbox"/>            | Citi Bank | Undefined | COURTYARD<br>BY MARRIOTT<br>Austin | 02/08/2023 | \$625.88  |

Displayed expenses: 4, Total: 4

Close Add To Report



To Edit the expense, **Click** on the check box next to the expense and then **select** Edit.

Alerts: 1

Expense | Undefined | 02/19/2023 | \$112.58

**!** The entry has Undefined expense type. You must select an expense type for the entry before you can submit the expense report. [View](#)

test \$112.58

Not Submitted | [Report Number: NX1QG7](#)

[Report Details](#) [Manage Receipts](#) [Travel Allowance](#)

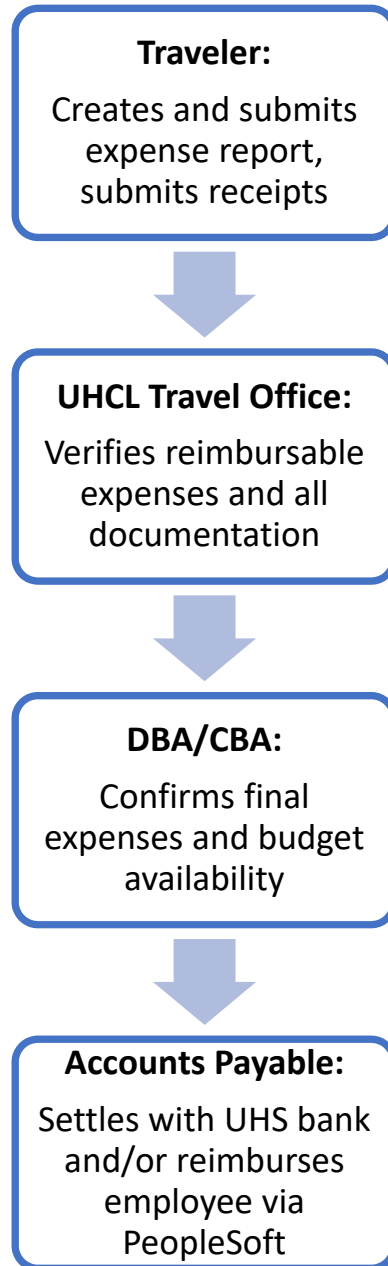
[Add Expense](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#) [Combine Expenses](#) [Move to](#)

| <input checked="" type="checkbox"/> | Alerts ↑↓ | Receipt ↑↓ | Payment Type ↑↓ | Expense Type ↑↓ | Vendor Details ↑↓           |
|-------------------------------------|-----------|------------|-----------------|-----------------|-----------------------------|
| <input checked="" type="checkbox"/> | <b>!</b>  |            | Citi Bank       | Undefined       | Courtyards<br>Austin, Texas |

Make sure that the Expense Type, Check-in, and Check-out Dates are correct and then save the expense. Upload a receipt. If any itemizations are necessary, the traveler will be prompted to itemize.

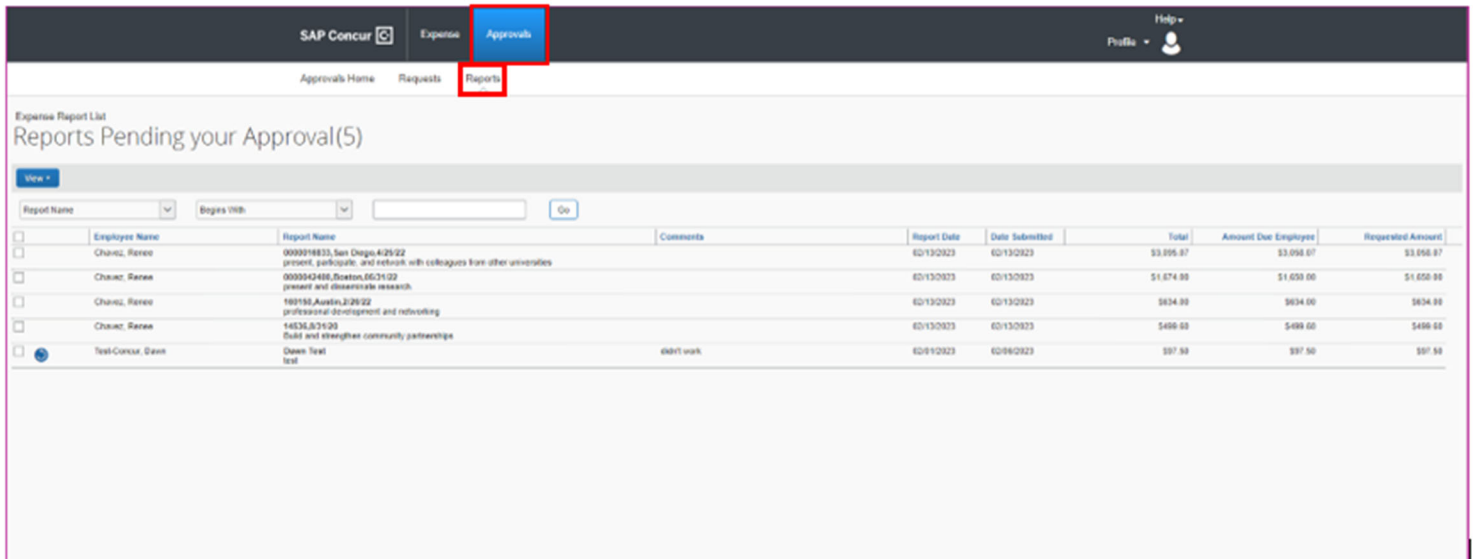
- Any expenses charged to the Travel Card which are non-reimbursable in Concur must be repaid to UHCL within **45 business days**.
- Repayment must be made at the Student Business Services (SBS) window at the Student Services Classroom Building by bringing (a) a check or cash, and (b) 2 copies of the Peoplesoft journal coversheet, all contained in a **locked bank bag**.
- The deposit at SBS must occur on the **SAME DAY** as the journal is approved in PeopleSoft.
- Any outstanding or unpaid repayments older than 45 business days will become vendor holds with the State of Texas Comptroller of Public Accounts.

## Expense Approval Workflow



# Expense Approval

Click on Approval then Reports. A list of expense reports pending approval will appear. Click on the name of the report to open a report.



The expense report will open. The view can be changed by **Clicking** View. A drop-down box will appear, and you can arrange the report to see expenses in a list or detailed. They can also be grouped by date or expense type.

Review each expense by **Clicking** on each row. To the right will appear the expense detail. There is a tab at the top of this section that attached receipts can be viewed. Once verified **Click** the drop-down arrow under review and mark yes. If the full amount is not approved by the department change the Approved Amount field to the correct amount. If the full amount is to be paid simply **Click** Save at the bottom right. Each expense will need to be reviewed and saved.

If the expense report is not correct, the approver **Clicks** Send Back to Employee so that the employee can make changes. If the report is approved simply **Click** Approve at the top right. The system will confirm that you have approved the expense report with a popup screen that will only last a few seconds that reads Approved.

## Expense Approver (CONT'D)

The screenshot displays the SAP Concur Expense Approver interface. The top navigation bar includes 'SAP Concur', 'Requests', 'Expense', and 'Administration'. The main header shows 'Manage Expenses' and 'Process Reports'. The transaction ID is '0000042400,Boston,05/31/22'. The interface is divided into two main sections: a list of expenses on the left and a detailed view of a selected expense on the right.

**Expenses List:**

| Expense Type  | Reviewed | Amount            | Requested         |
|---|----------|-------------------|-------------------|
| Expense Type: Airfare                                   |          |                   |                   |
| 85/04/2022 Airfare<br>Frontier Airlines, Houston, Texas | N        | \$570.00          | \$570.00          |
| Expense Type: Hotel                                     |          |                   |                   |
| 85/01/2022 Hotel<br>Delta Inn, Houston, Texas           | V        | \$780.00          | \$780.00          |
| 85/09/2022 Hotel  | N        | \$195.00          | \$195.00          |
| 85/02/2022 Hotel  | N        | \$195.00          | \$195.00          |
| 85/08/2022 Hotel  | N        | \$195.00          | \$195.00          |
| 85/07/2022 Hotel  | N        | \$195.00          | \$195.00          |
| Expense Type: Meals                                     |          |                   |                   |
| 85/01/2022 Meals<br>Waldorfs, Boston, Massachusetts     | N        | \$38.00           | \$38.00           |
| 85/01/2022 Meals  | N        | \$39.00           | \$39.00           |
| 85/04/2022 Meals<br>Denny's, Boston, Massachusetts      | N        | \$38.00           | \$38.00           |
| 85/09/2022 Meals  | N        | \$38.00           | \$38.00           |
| 85/09/2022 Meals<br>Ranger King, Boston, Massachusetts  | N        | \$40.00           | \$38.32           |
| 85/09/2022 Meals<br>Panera, Boston, Massachusetts       | N        | \$47.00           | \$42.68           |
| 85/08/2022 Meals<br>Panera, Boston, Massachusetts       | N        | \$38.00           | \$41.58           |
| 85/08/2022 Meals<br>McDonalds, Boston, Massachusetts    | N        | \$45.00           | \$37.42           |
| 85/07/2022 Meals<br>Waldorfs, Houston, Texas            | N        | \$35.00           | \$35.00           |
| 85/07/2022 Meals  | N        | \$38.00           | \$38.00           |
| <b>TOTAL APPROVED</b>                                   |          | <b>\$1,674.00</b> |                   |
| <b>TOTAL REQUESTED</b>                                  |          |                   | <b>\$1,650.00</b> |

**Expense Detail View:**

Expense Type: Hotel  
Transaction Type: Employee  
Travel Type: Out of State  
Transaction Date: 85/01/2022  
Vendor: Days Inn  
City of Purchase: Houston, Texas  
Payment Type: Paid by Traveler  
Amount: 780.00 USD  
Approved: Yes  
Approved Amount: 780.00  
Comment: [Empty]

**Expenses As:** Custom  
● List  
Detail  
Group By: Date  
● Expense Type  
No Grouping  
Calendar: One week, Two weeks, Month

## Travel Booking Online

### Updating Your Travel Profile

Before you use Concur Travel for the first time, you need to complete your Travel profile. You must save your profile before you can book a trip.

Use the options to set or change your personal preferences and settings, which include:

- Assistant or travel arranger (delegate)
- Credit card (automatically added as Travel Card, but you can add your personal credit card too)
- Email options
- E-Receipts
- Language
- Password
- Personal preferences (name, address, emergency contact, credit card)
- Regional preferences (number format, date format, language)
- Register for SAP Concur for Mobile
- Travel preferences (air, hotel, car rental, rail preferences)

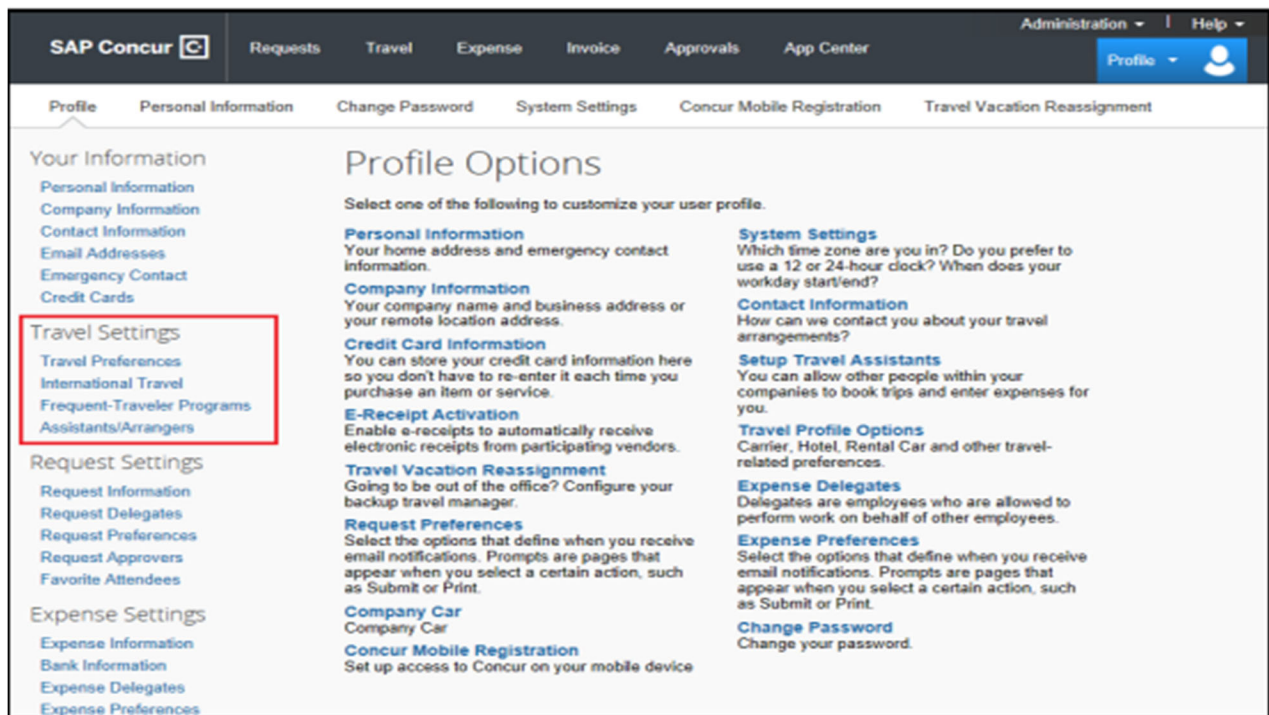
# Travel Arranger /Delegate

## To administer travel for another user

1. If you are a travel arranger and you want to change the profile of one of your users, **Click Profile**.
2. In the Administer for Another User Field, type the first few letters of the user's name.
3. Select the appropriate user from the search results, and then **Click Start Session**.  
Accessing your Travel Profile To access your Concur Travel profile information

4. **Click Profile > Profile Settings**.

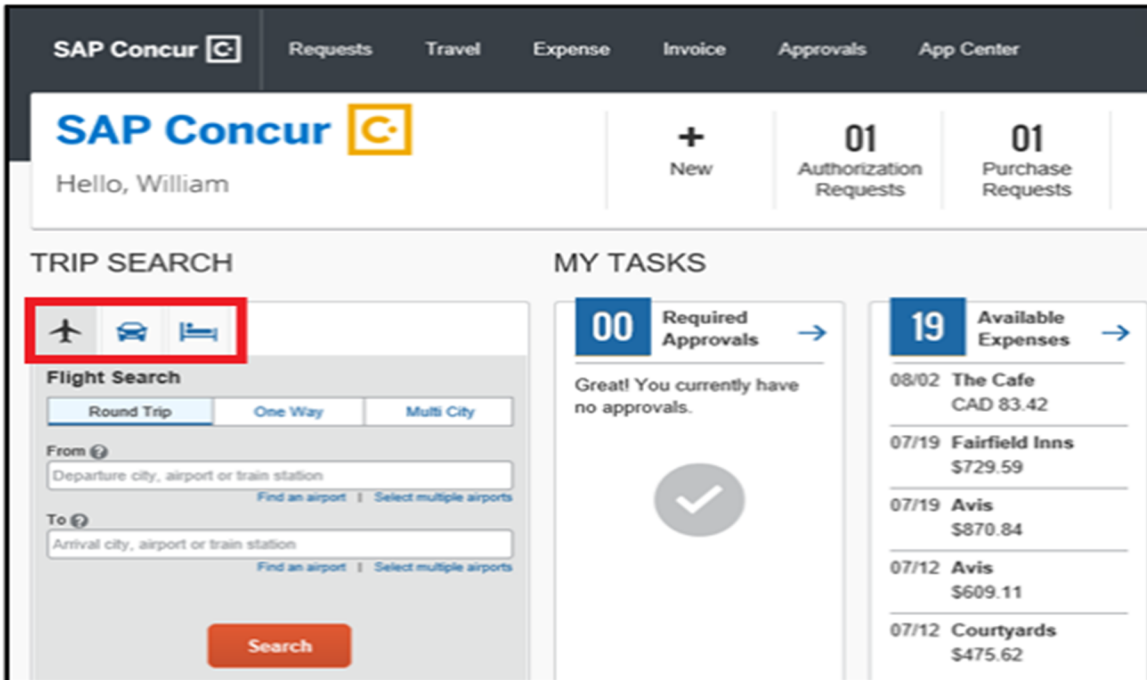
5. On the Profile Options page, select the appropriate Travel Settings links on the left side of the page



## Booking a Flight

From the home page, use the Flight tab to book a flight by itself or with car rental and/or hotel reservations. To book car and hotel reservations without a flight, use the Hotel and Car Search tabs, respectively. You can access the Flight tab (or Air / Rail) by doing the following:

- From the home page, **Click** t Travel on the menu.
- **Click** the SAP Concur logo from the left side of the menu.



### Step 1: Start the Search

1. Select one of the following types of flight options:

- Round Trip
- One Way
- Multi City

2. In the **From** and **To** fields, enter the departure and arrival cities. When you enter a city, airport name, or airport code, SAP Concur will automatically search for a match.

**Note:** Use the **Find an airport** and **select multiple airport** links as needed.

3. Click the **Depart** and **Return** date fields, and then select the appropriate dates from the calendar. Use the remaining fields in this section to define the appropriate time range.

4. Click the arrow to the right of the time window to see a graphical display of nonstop flights available for the routing and date you have selected. This allows you to adjust your search criteria, and if necessary, to see/reserve nonstop flights.

**Note:**

- The graphical display is based on flight schedule data. It will not show any rail options, and it cannot take refundability or class of service preferences into account.
- Each green bar represents 30 minutes of time. Place your mouse pointer over a green bar to see all the flights available for that time slot.
- If you change locations or dates, select refresh graph for more data.

5. If you need a car, Click the **Pick-up / Drop-off** car at the airport check box.

- You can automatically reserve a car, allowing you to bypass viewing the car search results. When you select this option, additional fields appear. Select a vendor and car type; the car is automatically added to your reservation.
- If you need an off-airport car or have other special requests, you can skip this step and add a car later from your itinerary.

6. If you need a hotel, Click the **Find a Hotel** check box.

7. Click Search.

The image shows a flight search interface. At the top, there are three icons: an airplane, a car, and a bed. Below these is the title "Flight Search". There are three tabs: "Round Trip" (selected), "One Way", and "Multi City". The "From" field contains "Seattle, WA - Seattle-Tacoma Intl Airport" with a "Find an airport" link and "Select multiple airports" text. The "To" field contains "MEM - Memphis Airport - Memphis, TN" with similar links. The "Depart" field shows the date "03/26/2023", a "depart" dropdown, "Morning" time, and a "± 3" dropdown. The "Return" field shows "03/31/2023", a "depart" dropdown, "Afternoon" time, and a "± 3" dropdown. There are two checkboxes: "Pick-up/Drop-off car at airport" (unchecked) and "Find a Hotel" (unchecked). Below these are "Class" (set to "Highest allowed") and "Search by" (set to "Schedule") dropdowns. There are two more checkboxes: "Include additional refundable air fares" (unchecked) and "Flights w/ no double connections" (checked). At the bottom is a red "Search" button.

## Step 2: Select a flight

### 1. On the **Select Flights** page:

- If you selected **Price** on the previous page, the **Shop by Fares** tab is initially active. Select either the **Shop by Fares** or **Shop by Schedule** tab for the appropriate flight information.
- **Click the View Fares** button for the flights that you want to purchase.

SEATTLE, WA TO MEMPHIS, TN  
SUN, MAR 26 - FRI, MAR 31

Show as USD

Hide matrix Print / Email

|                      | Alaska Airlines     | American Airlines    | United              | Delta                | Multiple             |
|----------------------|---------------------|----------------------|---------------------|----------------------|----------------------|
| All<br>100 results   | Preferred           |                      |                     |                      |                      |
| 1 stop<br>93 results | 795.40<br>2 results | 620.40<br>28 results | 620.40<br>8 results | 745.40<br>33 results | 777.40<br>22 results |
| 2 stops<br>7 results | —                   | —                    | 771.19<br>3 results | —                    | 896.19<br>4 results  |

Shop by Fares Shop by Schedule

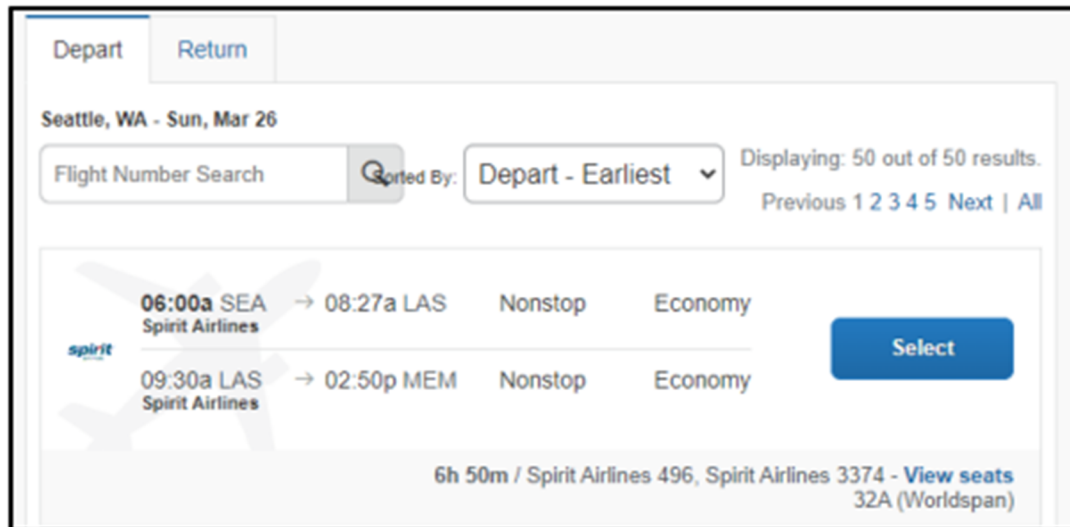
Flight Number Search  Sorted By: Price - Low to High

Displaying: 100 out of 100 results.  
Previous | Page: 1 of 10 | Next | All

|  |  |            |        |                            |
|--|--|------------|--------|----------------------------|
|  | 10:55a SEA → 10:04p MEM<br>United 1467, 1612 | 1 stop ORD | 9h 09m | \$620.40                   |
|  | 02:42p MEM → 09:19p SEA<br>United 2228, 795  | 1 stop DEN | 8h 37m | <a href="#">View Fares</a> |

If you **Clicked** Schedule on the previous page, the **Depart** tab is initially active. **Click** the **Select** button for the flights that you want to purchase from the **Depart** and **Return** tabs.

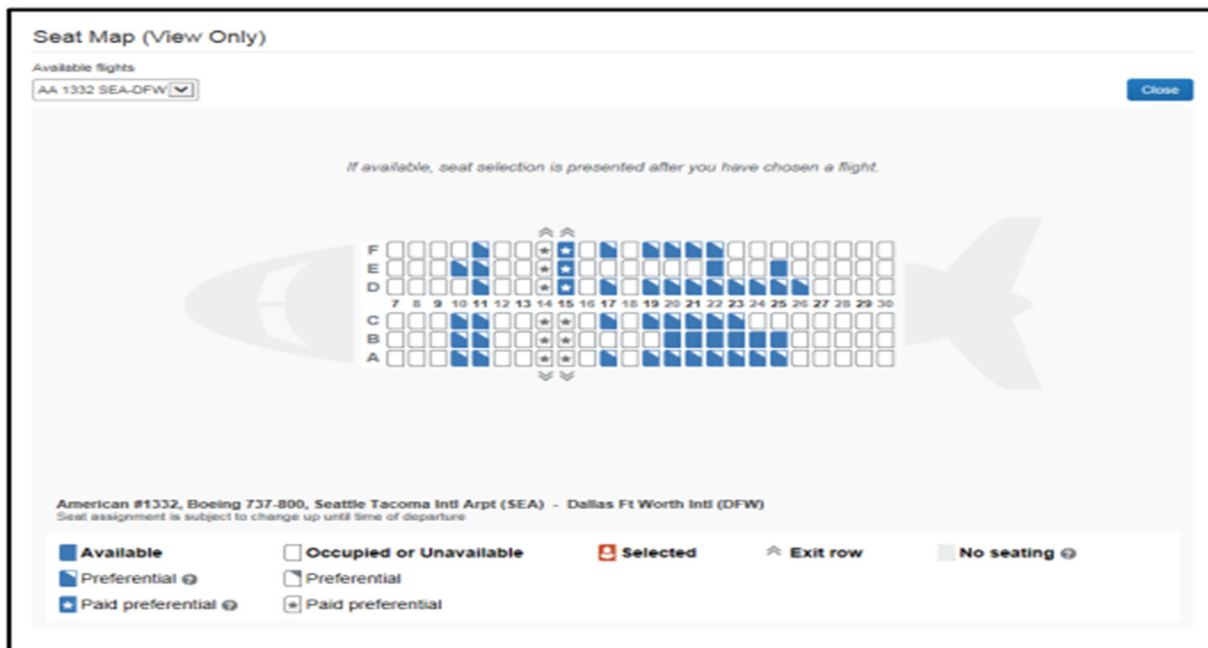




2. Click the **Hide Matrix** link to view additional information on the screen.

3. Review the flight details for your trip.

**Note:** Depending on your airfare provider, you can select the *View seats* link to select your seat on the flight. Select the appropriate Available seat from the Seat Map.



4. On the **Review and Reserve Flight** page you can:

- Review the flight details
- Enter traveler information
- Select frequent flyer programs

- Select your seat assignment
- Review the price summary
- Select your method of payment

5. Click Reserve Flight and Continue.

### Step 3: Select a rental car

If you requested a car on the **Flight** tab (or **Air / Rail**) **Search**, the rental car search results appear. For information about booking a rental car, see Booking a **Car** in this document.

### Step 4: Select a hotel

If you requested a hotel on the **Flight** tab (or **Air / Rail**) **Search**, the hotel search results appear. For information about booking a hotel, see Booking a Hotel, in this document



Review and change your itinerary, if necessary.

1. In the Trip Overview section:

- Review the information for accuracy.
- In the **I want to** section, print, or email your itinerary as appropriate.
- In the **Add to your Itinerary** section, add a car, hotel, Wi-Fi, etc., as needed.

## Travel Details

**TRIP OVERVIEW**

|   |   |   |
|---|---|---|
| <p><b>I want to...</b><br/> <a href="#">Print Itinerary</a><br/> <a href="#">E-mail Itinerary</a></p> | <p><b>Trip Name:</b> Trip from Seattle to Memphis <a href="#">(Edit)</a><br/> <b>Start Date:</b> March 26, 2023<br/> <b>End Date:</b> March 31, 2023<br/> <b>Created:</b> March 14, 2023, William Never<br/> <i>(Modified: March 14, 2023)</i><br/> <b>Description:</b> (No Description Available) <a href="#">(Edit)</a><br/> <b>Agency Record Locator:</b> 2BV9NZ<br/> <b>Passengers:</b> William.Nate Never<br/> <b>Total Estimated Cost:</b> \$620.40 USD <a href="#">(Details)</a></p> | <p><b>Add to your Itinerary</b></p> <p> Car     Hotel</p> <p><small>Booked outside Concur? Enter your trip manually or connect with Tript</small></p> |
|---|---|---|

2. Under **Reservations**, in the **Flight** section:

- Verify the information for accuracy.
- Select **Change Seat** if you want to change your seat option (depending on the airline).
- To **change or cancel** your flight from the itinerary page. If so, select **Change or Cancel all Air**, and then follow the prompts to change your outbound or return flight. Travelers given the option to change flight will be able to select a different date or time for the trip but must stay on the same airline. If you want to **cancel** your flight, **Click** Cancel all Air.

**Note:** Changing flights can result in fare changes. If this option is available, please check with your travel agency on fare differences.

The screenshot shows a flight reservation interface. At the top, it says "RESERVATIONS" and "Sunday, March 26, 2023". The flight is identified as "Flight Seattle, WA (SEA) to Chicago, IL (ORD)" with a "Cancel all Air" button highlighted in a red box. The airline is "United 1467". The departure is at "10:55 AM" from "Seattle-Tacoma Int'l Airport (SEA)" with a duration of "4 hours, 9 minutes" and is "Nonstop". The arrival is at "05:04 PM" at "Chicago O'Hare Int'l Airport (ORD)" in "Terminal: 1". The confirmation code is "JX53DJ" and the status is "Confirmed". A "Seat: 38C" is assigned, with a "Change seat" button. Under "Additional Details", the aircraft is "Boeing 737 MAX 9", the distance is "1716 miles", the ticket is "E-Ticket", the cabin is "ECONOMY (V)", and the meal is "Food for purchase". A note at the bottom indicates a "3 hr, 8 min layover at Chicago O'Hare Int'l Airport (ORD)".

3. Review the remaining sections as necessary and make the appropriate changes.
4. Review the **Total Estimated Cost** section.
5. **Click Next.**

## **Step 6: Review the booking information**

1. Use the Trip Booking Information page to enter additional information about your trip.

**TRIP SUMMARY**

✓ **Finalize Trip**

- ✓ Review Travel Details
- Enter Trip Information**
- Submit Trip Confirmation

### Trip Booking Information

The trip name and description are for your record keeping convenience.

**Trip Name**  
This will appear in your upcoming trip list.

Trip from Seattle to Memphis

**Trip Description (optional)**  
Used to identify the trip purpose

Send a copy of the confirmation to:

Send my email confirmation as  
 HTML  Plain-text

(Please advise why you did not book a car.) [Required]

Please enter information about this trip then press **Next** to finalize your reservation. If you close at this point your reservation may be cancelled. Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled.

Display Trip <- Previous Next >- Cancel Trip

2. Enter or modify your **Trip Name**. This is how the trip will appear on your itinerary and in the automated email from SAP Concur.
3. Enter a **Trip Description** (optional).
4. Indicate if there is anyone else who should receive the initial confirmation email. Enter as many recipients as needed, separated by commas.
  - If you book the trip, you will automatically receive the email.
  - If you book as a delegate, you will also receive the email.
5. Choose your preferred email format, either plain text or HTML.
6. **Click Next.**

**Note:** SAP Concur displays your itinerary on the **Trip Confirmation** page. This itinerary will include any messages about ticketing policies.

**TRIP SUMMARY**

✓ **Finalize Trip**

- ✓ Review Travel Details
- ✓ Enter Trip Information
- Submit Trip Confirmation

**Trip Confirmation**

To **COMPLETE BOOKING**, please press the "Confirm Booking" Button after reviewing this page.  
To **CANCEL**, press the Cancel button.

This reservation will not be ticketed until your request is approved.

**TRIP OVERVIEW**

Trip Name: Trip from Seattle to Memphis  
Start Date: March 26, 2023  
End Date: March 31, 2023  
Created: March 14, 2023, William Never (Modified: March 14, 2023)  
Description: (No Description Available)  
Agency Record Locator: 2BV9NZ  
Passengers: William Nate Never  
Total Estimated Cost: \$620.40 USD

**i** This trip requires approval.  
The deadline for approval is: 03/15/2023 9:00 PM Pacific

Activate [TripIt](#) to see your plans and stay one step ahead while traveling.

Agency Name: CTE Demo Site

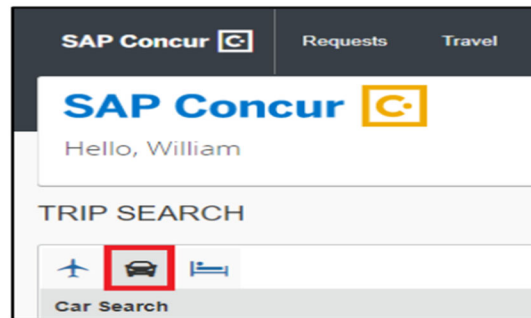
## **Step 7: Purchase the Ticket**

1. Scroll down and **Click** Confirm Booking to send your request to your manager for approval and the travel agent.
2. **Click** Finish. The **Finished!** screen shows your confirmation number and information to contact the travel agent.
3. **Click** Return to Travel Center.

# Booking a Car

## Step 1: Use the Car tab

1. If you require a car but not airfare, select the Car tab.



2. Enter your **Pick-up and Drop-off dates and times.**
3. In the **Pick-up car at** section, select either:
  - **Airport Terminal**, and then type the city or the Airport code
  - **Off-Airport**, and then enter (or search for) the location (depending on your company's configuration, you might be able to have a car delivered to or picked up from your company location).
4. **Click the Return car to another location** checkbox if needed. Additional fields appear. Choose the appropriate location.
5. To see additional search preferences, **Click More Search Options.**
  - Select the Car Type.
  - Select smoking or non-smoking.
  - Select the preferred vendors.
6. **Click Search.**

## Step 2: Filter the results (as needed)

**Note:** Only available options with State contracted vendors will be displayed.

There are two sets of filters: a matrix at the top of the page that you can show or hide, and one on the left side of the page.

TRIP SUMMARY

PICK UP: (MEM) ON SUN, MAR 26 12:00 PM  
RETURN: FRI, MAR 31 12:00 PM

Show as USD

Select a Car

Pick-up: Sun, 03/26/2023  
Drop-off: Fri, 03/31/2023

Finalize Trip

Use my default credit card: 'Corp Travel Card'

Change Car Search

Car Display Filters

- Unlimited miles
- Air conditioning
- Hybrid
- Car Transmission
  - Automatic
  - Manual

| All 57 results                | Compact | Economy | Intermediate | Standard | Full-size | Premium | Luxury |
|-------------------------------|---------|---------|--------------|----------|-----------|---------|--------|
| <b>AVIS</b><br>Most Preferred | 664.58  | 664.58  | 665.85       | 667.12   | 667.12    | 771.67  | 804.82 |
| <b>dollar.</b>                | 281.26  | 416.61  | 286.10       | 290.97   | 295.80    | 347.65  | 362.15 |
| <b>Hertz</b>                  | 602.33  | 607.42  | 609.96       | 406.87   | 419.64    | 493.82  | 512.33 |
| <b>Enterprise</b>             | 449.30  | 407.73  | 448.70       | 602.67   | 448.72    | 538.45  | 560.89 |
| <b>Enterprise</b>             | 449.30  | 508.71  | 448.70       | 667.09   | 605.30    | ---     | ---    |

Sorted By: Policy - Most Compliant

Displaying 38 out of 38 results.

Previous 1 2 3 4 Next | All

**AVIS** Compact Car - \$96.00 per day (Worldspan)

Automatic transmission  
Unlimited miles, Pick-up: Terminal: MEM  
Adults: 2, Children: 2, Large bags: 1, Small bags: 2  
\$479.99 weekly rate

Total cost: \$664.58

7. Select your filter options from the matrix, and from the **Car Display Filters** section on the left.

8. Click the fare button for the car you want to rent.

9. In the **Review and Reserve** section, select the appropriate options.

- **Provide Rental Car Preferences:** Enter any necessary information in the Comments field, and then select any additional preferences that you want.
- **Enter Driver Information:** To add a Rental car Agency Program, **Click the Add a Program link.**
- **Select a Method of Payment:** If you set up a credit card as the default in your profile, the credit card appears. Select the credit card you want to use from the drop-down list. To add a credit card, **Click the Add a credit card link.**

**10.** If you want to change your search, in the **Change Car Search** area:

- Change your pick-up and drop-off dates and times, and your pick-up and drop-off locations.
- Expand **More Search Options** to select the car type and vendors that you prefer.
- **Click Search**. Travel displays the new results.

**11.** In the **Travel Details** section:

- **Select** the appropriate links to print or e-mail your itinerary and follow the prompts.
- **Click** Change or Cancel if needed, and then follow the prompts to change your reservation.

**12.** **Click Next**

**13.** **Click Reserve Car and Continue.**

**14.** On the **Trip Booking Information** page:

- Enter or modify your **Trip Name**. This is how the trip will appear on your itinerary and in the automated email from SAP Concur.
- Enter a **Trip Description** (optional).
- Indicate if there is anyone else who should receive the initial confirmation email. Enter as many recipients as needed, separated by commas.

**15.** **Click Next,**

**16.** On the **Trip Confirmation** page, review your trip details, and then **Click Confirm Booking**. If your trip is not compliant with your company's travel policy, a **Travel Rule Triggered** window appears.

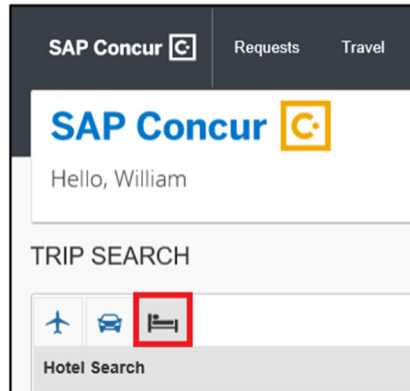
**17.** **Click Save.**



# Booking a Hotel

## Step 1: Use the Hotel tab

1. If you require a hotel but not airfare, **Click the Hotel tab.**



2. Enter the **Check-in and Check-out Dates** (or select each field and use the calendar).
3. Enter the search radius. SAP Concur will always show preferred hotels within a larger radius, usually 30 miles.
4. Choose to search near an airport, an address, company location, or near a reference point / zip code (a city or neighborhood).
5. Enter the reference point. The available options will depend on your selection in Step 4.
6. **Click Search.**

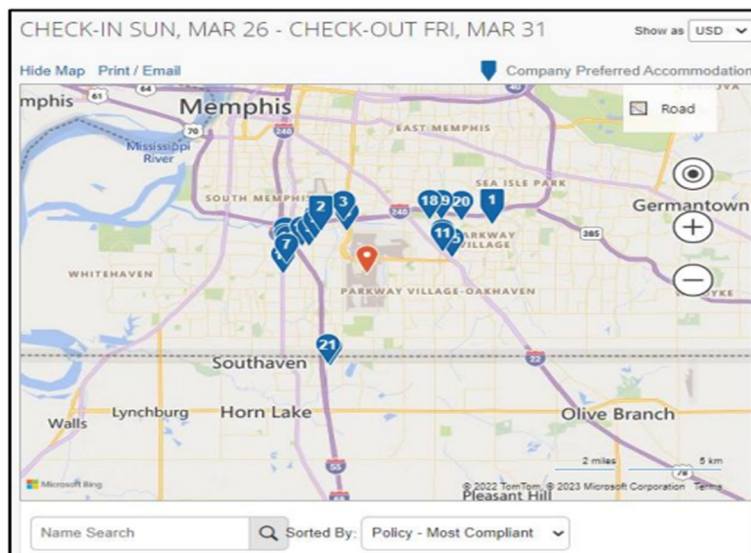
## Step 2: Change and filter your search (as needed)

There is a filter set on the left side of the page. Use show and hide arrows, as needed.

1. In the **Change search** area:
  - Change your check-in and check-out dates; change your hotel location.
  - **Click Search**. Travel displays the new results.
2. Use the slider in the **Price** area to narrow your search.
3. In the **Display Settings** area, select the appropriate check boxes.
4. In the **Hotel Chain** area, select the appropriate hotels.
5. In the **Hotel Amenities** area, select the appropriate options.

## Step 3: Review the hotel map (as needed)

1. Review the hotel map. The red icon shows your reference point.
2. Select any blue "balloon" to see specific hotel information.
3. Use your mouse to zoom and move the map, as needed.



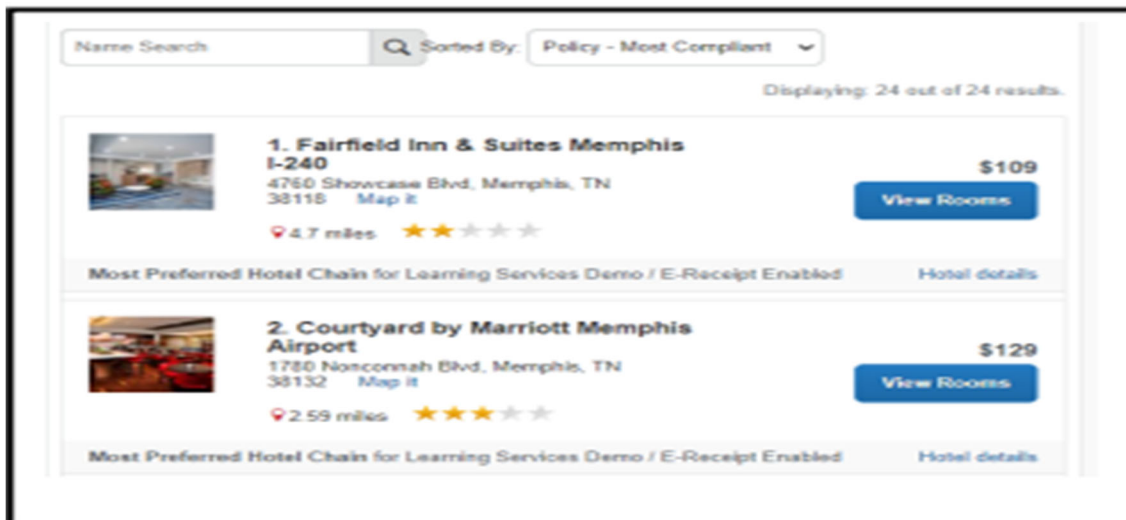
## Step 4: Sort the search results (as needed)

- Below the map, use the **Sorted By** list to sort the results. Enter hotel names, as needed.

## Step 5: Review the results

A picture as well as the name, address, rating stars, and price range appears.

1. Select the hotel picture to view more images.
2. **Click** Hotel details to see contact information, street address, cancellation policy and information about the facility.
3. **Click** View Rooms to see:
  - The available room options and rates
  - Other amenities per room/rate
  - Rules and cancellation policy



## Step 6: Select the hotel room

1. Select the **Cost** button next to the room that you want to reserve.

The screenshot displays a hotel booking page for Fairfield Inn & Suites Memphis I-240. The hotel's address is 4760 Showcase Blvd, Memphis, TN 38118, and it is 4.7 miles away. The hotel has a 4-star rating. A 'Hide Rooms' button is visible in the top right corner. Below the hotel information, there is a section for 'Room Options' with four choices, each with a green checkmark and a price button:

| Room Option  | Price |
|--|-------|
| Flexible Rate Guest Room 2 Queen-s- Please cancel 1 day before arrival (Worldspan)<br><a href="#">Rules and cancellation policy</a>      | \$109 |
| Flexible Rate Guest Room 1 King Please cancel 1 day before arrival (Worldspan)<br><a href="#">Rules and cancellation policy</a>          | \$109 |
| Flexible Rate Guest Room 1 King Sofa Bed Please cancel 1 day before arrival (Worldspan)<br><a href="#">Rules and cancellation policy</a> | \$114 |
| Flexible Rate Suite 1 King Sofa Bed Please cancel 1 day before arrival (Worldspan)<br><a href="#">Rules and cancellation policy</a>      | \$124 |

2. The **Review and Reserve Hotel** page appears. Navigate through the page and:

- Review or modify the room preferences.
- Verify or modify the guest and program information
- Review the price summary.
- Review and accept the rate details and cancellation policy.

3. Select the **I agree to the hotel's rate rules, restrictions, and cancellation policy** check box.

4. Click Reserve Hotel and Continue.

5. Your **Travel Details** page (itinerary) displays

# Concur Mobile

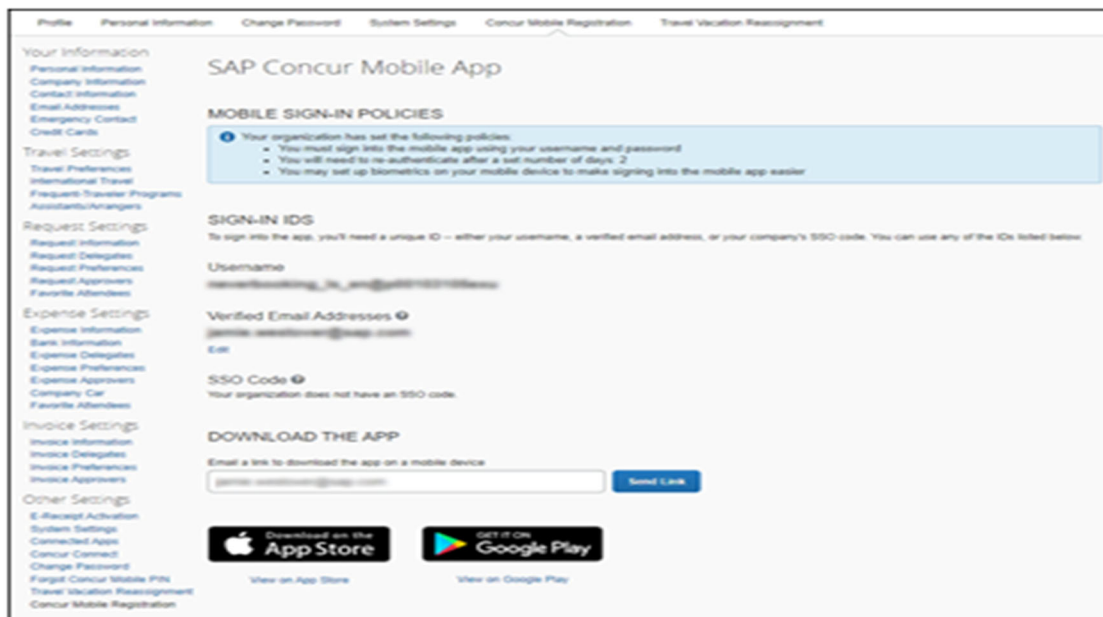
You can use SAP Concur on your mobile device to assist with your Expense, Travel, and Request needs. Because you are using your mobile device, you can access your information in a cab, in a meeting, or at the restaurant.

The Concur Mobile App works like the laptop version.

## Download

The **Concur Mobile Registration** link appears on the **Profile** menu in the web version of SAP Concur.

- Download the App from the App Store or Google Play
- Request a link from Concur site by going to Profile, Profile settings then Concur Mobile Registration



**Note:** SAP Concur will not let you sign in if your device does not have a passcode or if your device has been compromised (modified to remove manufacturer restrictions).

# Signing In

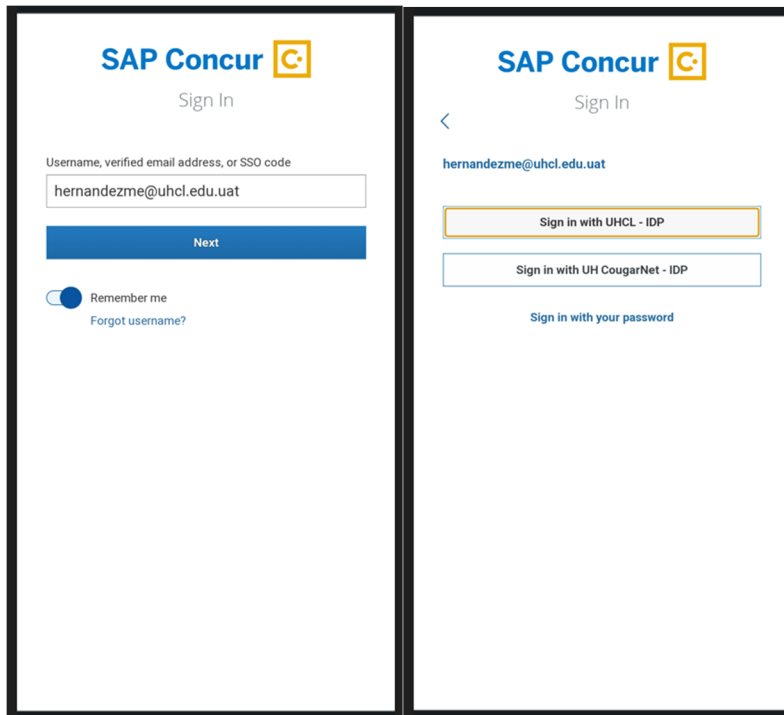


**Select** the Concur Mobile App from your mobile device to open.

**Enter** your UHCL email as the User ID then **tap** Next.

**Select** Sign in with UHCL – IDP

The App will redirect the traveler to sign on using single sign on.



# Concur Mobile App Landing Page

Once signed in you will see the Landing Page.

**Expenses:** Your wallet is a storage place for your receipts. They are safe here until the receipt is ready to be added to a report.

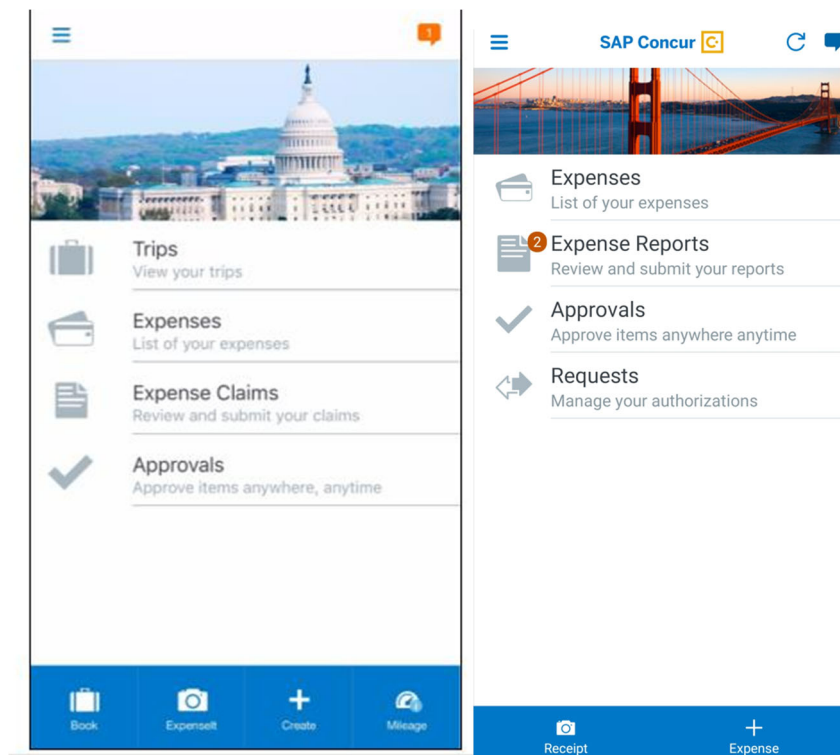
**Expense Reports:** A view of open expense reports and current statuses. An expense report can be completed from a mobile device.

**Approvals:** Pending requests and expense reports can be approved from the App.

**Requests:** A view of open requests and current statuses. A request can be made from a mobile device.

**Trips:** A view of all upcoming and traveled trips, view flight information, book travel

**Note:** Depending on individual device operating systems, the screens may vary slightly.

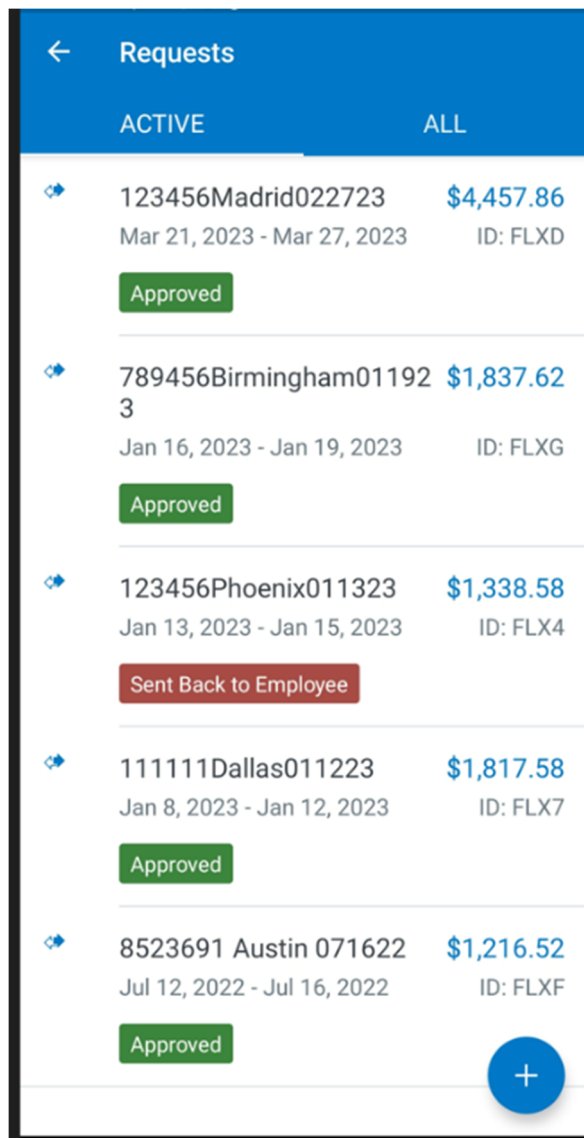


# Request

Click Request from the landing page.

A traveler can view all Active Requests or create a New Request.

To begin a New Request, simply **Click** on the **+** at the bottom right of the screen





# Receipts

Keeping track of receipts just got easier. From the Mobile App, click Receipt. This will open the camera on your device. Take a picture of the receipt.

Click Use to save the picture and a pop-up box will appear

**Receipt Store** – Will save the receipt to your wallet

**New Expense** – Will allow the traveler to expense the receipt from the app.



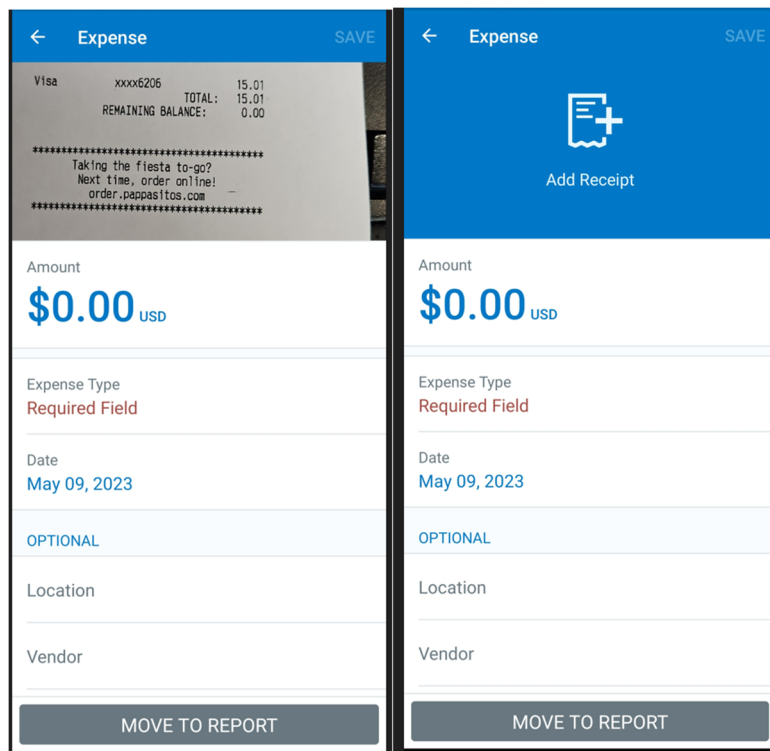
## Tips for receipts:

- A receipt is **required** for every purchase.
- Take a full picture of the receipt.
- The information **must** be legible
- The receipt must detail the prices, a description of the purchase and the total amount paid including tip.
- Hotel receipt/invoice must contain traveler's name, check in and out dates, a zero balance, daily charges and taxes/fees must be detailed and payment info.

# Expense

There are multiple ways to expense a receipt:

- If **New Expense** was selected after capturing the picture of the receipt, Concur will take the traveler to the form to detail the purchase.
- **Click on Expenses** from the landing page will take the traveler to their wallet, simply select the receipt that needs to be expensed, **Click** the three dots at the top right and then **Click** create expense.
- From the landing page, **Click** the **+** at the bottom of the screen and the traveler will be directed to the form. The form that appears will require a picture of a receipt either be taken with the device or uploaded from existing pictures on the device.



**Note:** For an expense to be saved to a report, an expense report must already have been created.

## Delegate Role

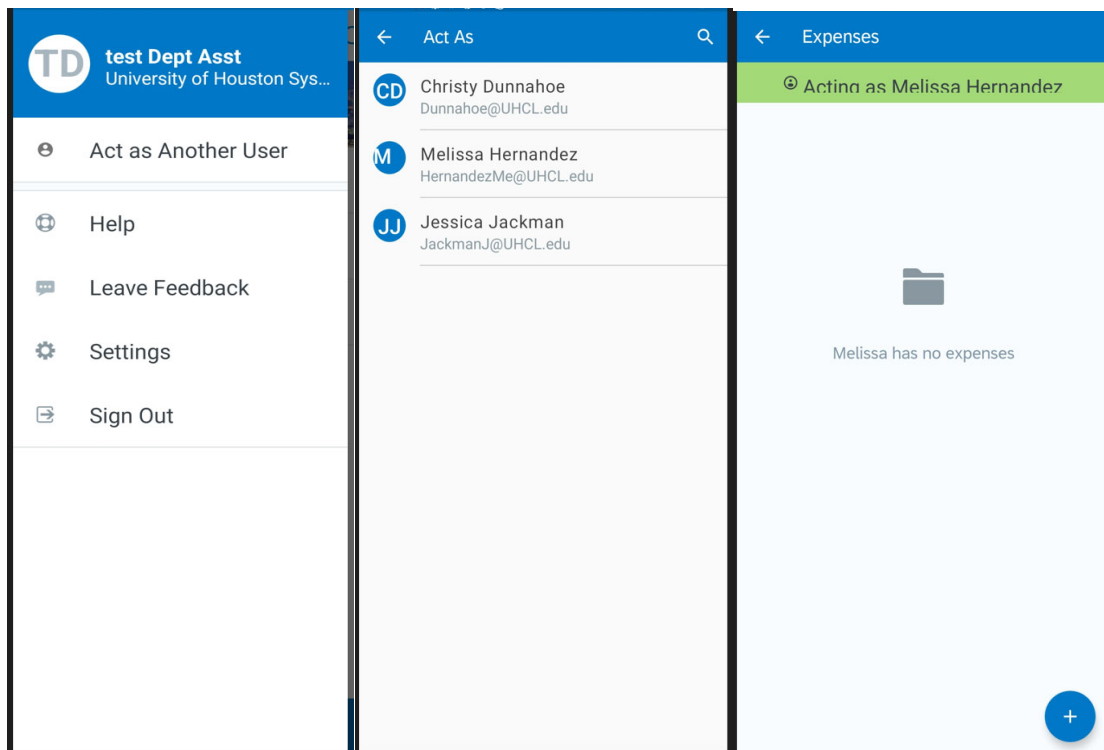
Acting as a Delegate only applies in the **Expense Module** within the Concur Mobile App. Delegates cannot request a trip via The Mobile App

From the landing page, **Click** the 3 lines in the upper left-hand corner.

**Click** Act As Another User.

A list of every traveler you can delegate for will be listed.

**Click** traveler.



## **C. Getting Support in Each Phase of Travel**

### **Trip Planning**

UHCL Travel Page: <https://www.uhcl.edu/about/administrative-offices/travel/resources>

UHCL Travel Office

Email: [traveloffice@UHCL.edu](mailto:traveloffice@UHCL.edu)

Phone: 281-283-2270

Concur Software: <https://www.concursolutions.com/nui/signin>

Concur Mobile App

Download



### **Mid-Trip/On the Road**

UHCL Travel Office

Phone: 281-283-2270

Email: [traveloffice@uhcl.edu](mailto:traveloffice@uhcl.edu)

Travel Card - Citibank customer Service available 24/7: 1-800-248-4553

### **After Trip/Return**

Travel Office

Phone: 281-283-2270

Email: [traveloffice@uhcl.edu](mailto:traveloffice@uhcl.edu)

Concur Software: <https://www.concursolutions.com/nui/signin>

### **Technical Issues**

Travel Office

Phone: 281-283-2270

Email: [ConcurTravel@UHCL.edu](mailto:ConcurTravel@UHCL.edu)

## **D. Time/Timing Matters! Key Points**

- Submit your Expense Report within **10 days** of the last date of travel
- Check trip Approval and Expense processing status online **24/7, or via the mobile app**
- If **>50%** of domestic trip days are personal (non-business) then travel is non-reimbursable.
- Personal days during *foreign travel* are reimbursable.
- Any non-reimbursable charges on your travel card **MUST** be repaid to UHCL within **45 business days** after your last date of travel. In the case of multiple consecutive trips, then the last date of travel for each trip starts the tolling period.
- Snap photos of your receipts en route to save time.

## E.

## FAQs

- **Candidate/Non-Employee Travel** – A non-employee requires a delegate to set up their Concur account for them. The delegate can create a request and subsequent expense report. If the non-employee seeks reimbursement, they will also need a Payment Works vendor ID (PWVI). That ID is entered on the access request page. The delegate can submit **only** for this traveler type.
- **Car Rental Auto Insurance** – When booking with a state contracted vendor for Car Rental additional insurance does not need to be added, it is included in the rental rate.
- **CITI Course** (For Foreign Travel) – <https://about.citiprogram.org/course/export-compliance-ec/>
- **Conferences** – You may book your conference rooms directly with the hotel/location. Concur travel request requires an uploaded flyer and daily agenda as documentation of expenses.
- **Embassies** – <https://www.usembassy.gov>
- **Export Control Form** - <https://www.uhcl.edu/about/administrative-offices/sponsored-programs/export-controls/>
- **Personal Credit Card** – You can use your personal credit card for charging UHCL business travel expenses if you have included it in your Concur profile

To be continued as we have more experience in live production....