University of Houston Clear Lake

UHCL CONCUR

TRAVEL GUIDE

Business Operations – Version 1

June 2023

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A. Getting Started

Contact Information

- **University of Houston-Clear Lake - Travel Office**

  Phone: 281-283-2270
  Email: 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.

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.

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.

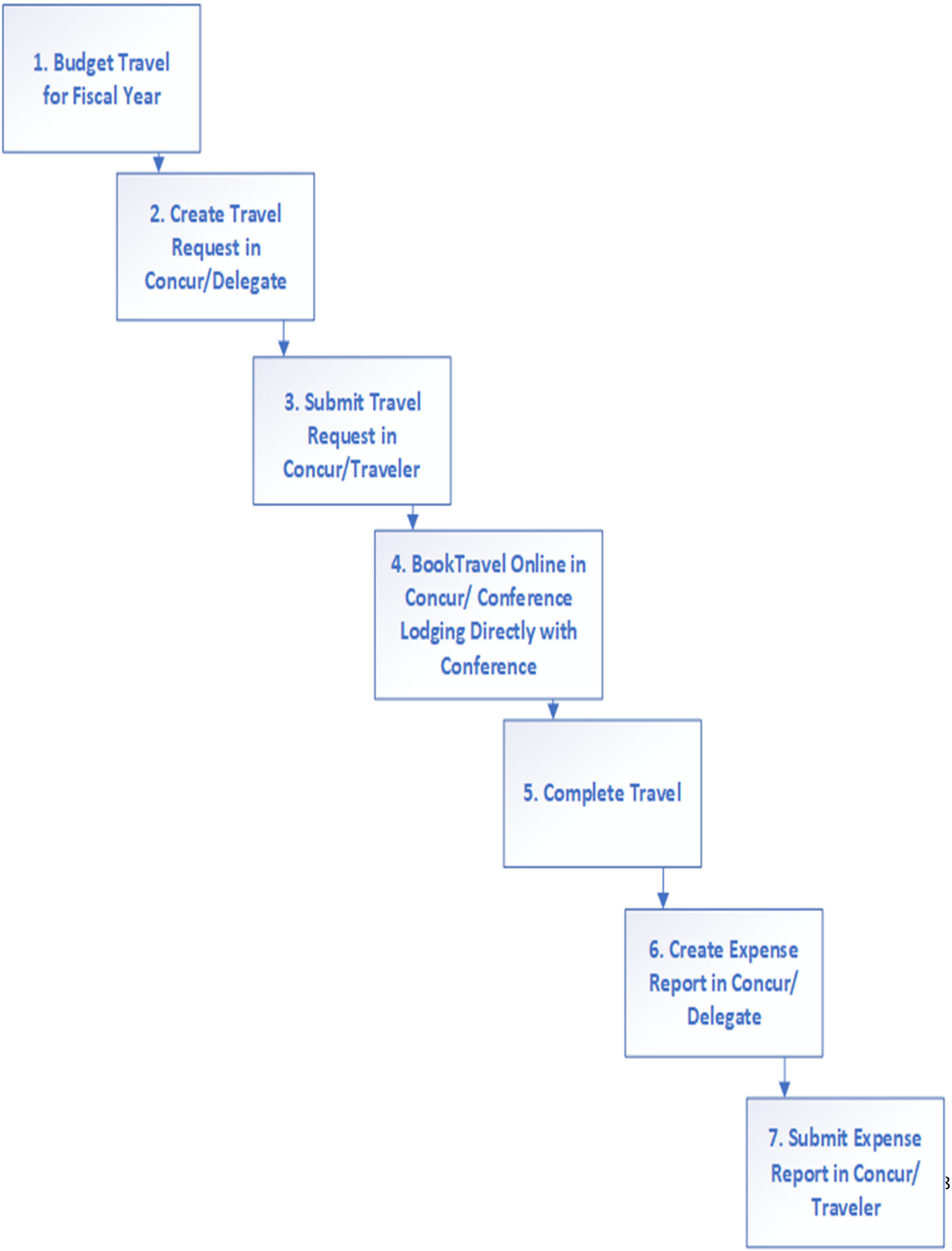
✓ The **Travel** module is where your requested itinerary is transformed into actual bookings for your trip. This includes hotel, car, airfare and/or other transport. Online bookings are included within Concur for no additional charge. Any bookings purchased directly through the travel agency for exceptional 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.*


1. Budget Travel for Fiscal Year
2. Create Travel Request in Concur/Delegate
3. Submit Travel Request in Concur/Traveler
4. BookTravel Online in Concur/ Conference Lodging Directly with Conference
5. Complete Travel
6. Create Expense Report in Concur/ Delegate
7. Submit Expense Report in Concur/ Traveler

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 **Agency Proposal** 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
- Use your UHCL single sign on to log in

□ Go to your Profile and confirm Profile Information

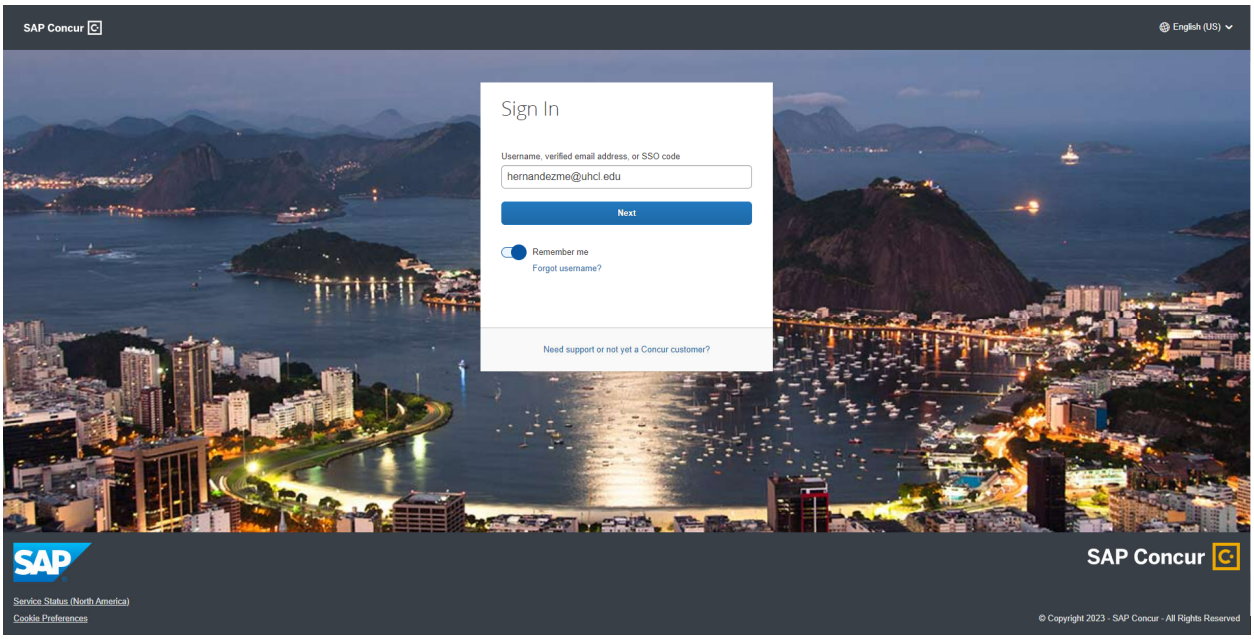
- Name, ID, basic contact information
- Add any desired information (phone numbers, alternate email, etc.)
- Activate e-receipts

□ 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

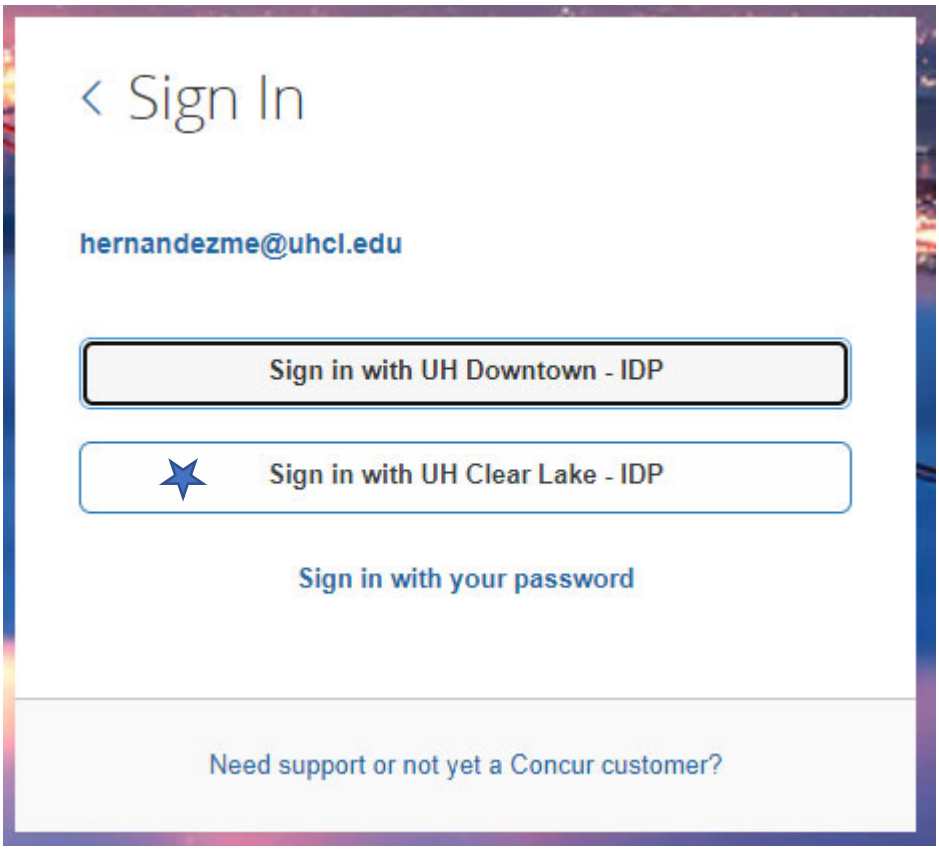
B. Signing In … and Getting Moving!

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



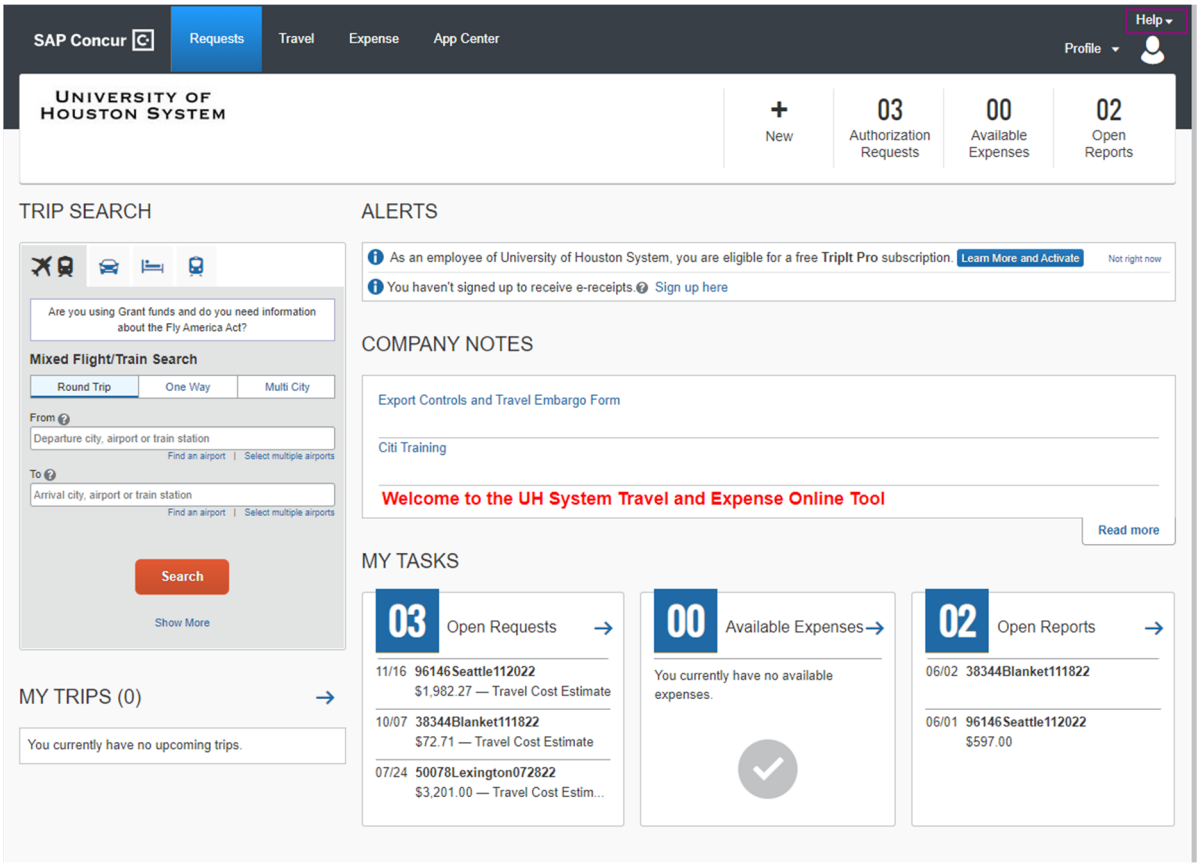
Enter your UHCL email address and click next (example: doej@uhcl.edu)

Click Sign in with *UHCL - IDP*



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

Welcome to Concur!



Home Page

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

1. Top Header Top left of the screen contains tabs below.

SAP Concur Tab Will return the traveler to their home page.

Request Tab Will take the traveler to the travel request page.

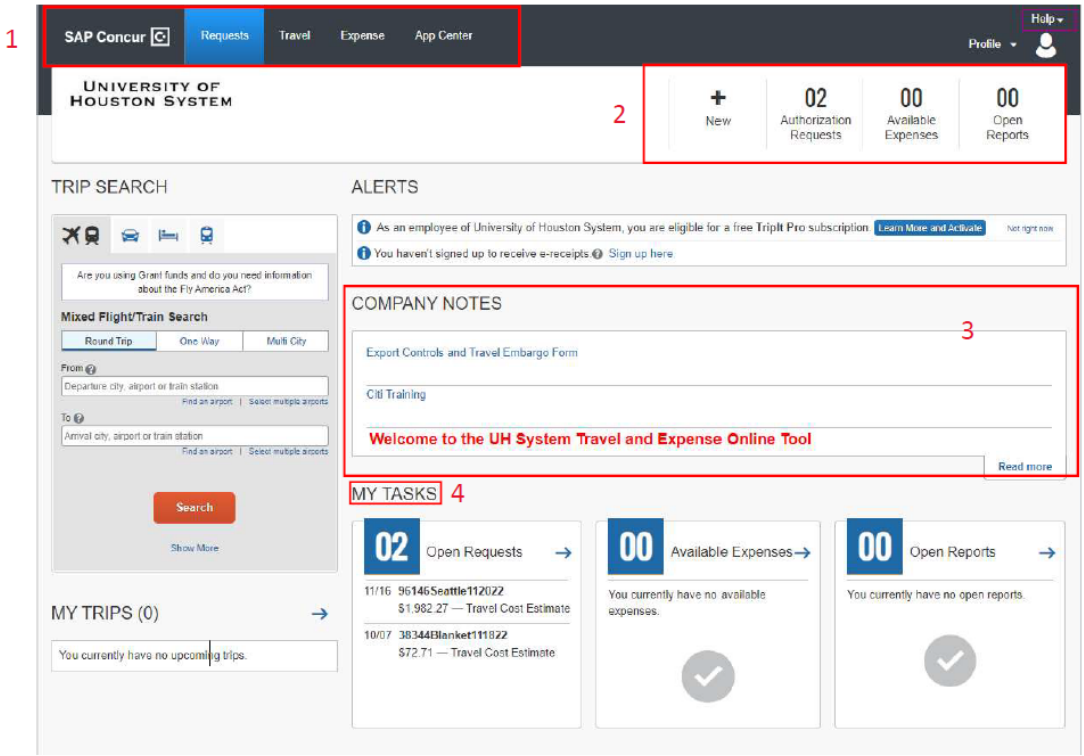
Expense Tab Will take the traveler to the expense reports page.

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.

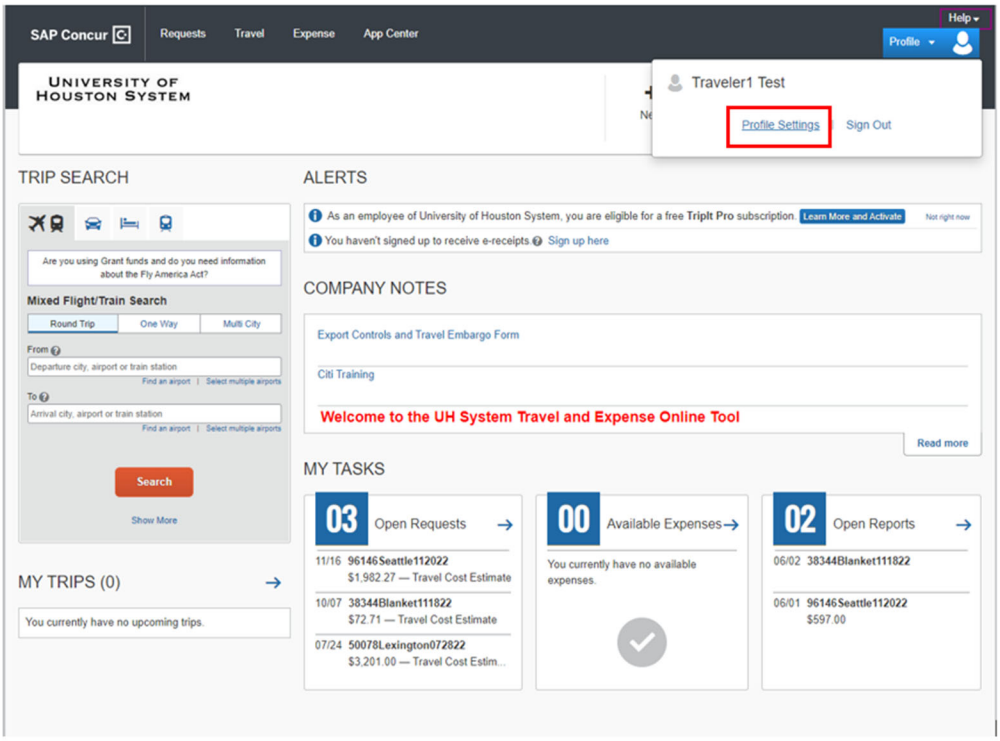


Using Delegates

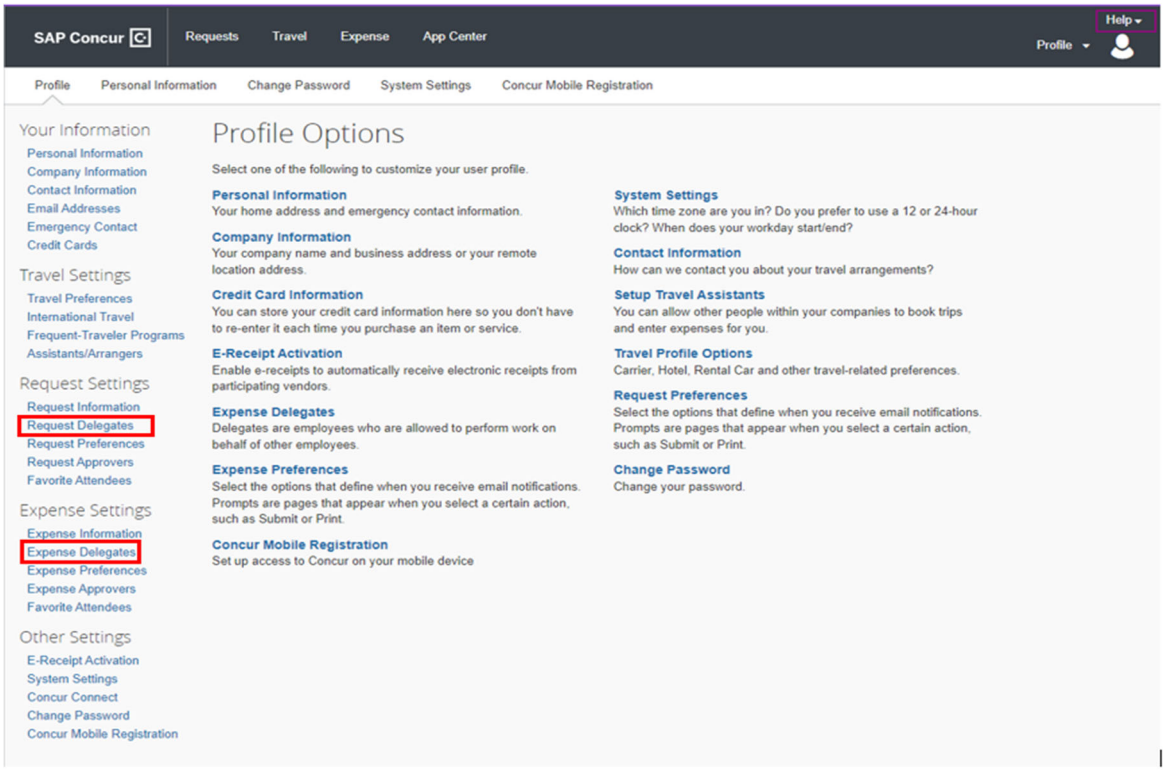
A traveler may assign a delegate to *create* their travel request and expense reports for them. They may also have the delegate view receipts and receive emails on their behalf. The permissions provided to the delegate depend on how the traveler sets up their profile; delegates may have fewer permissions 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

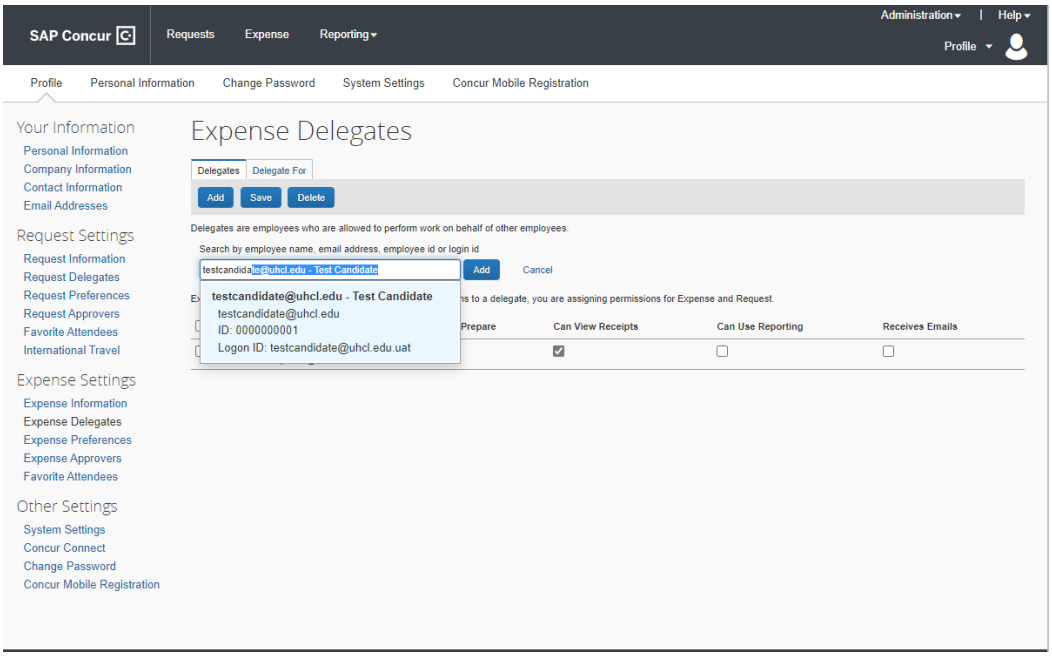
Select Profile and then Profile Settings



Click Expense or Request Delegates.

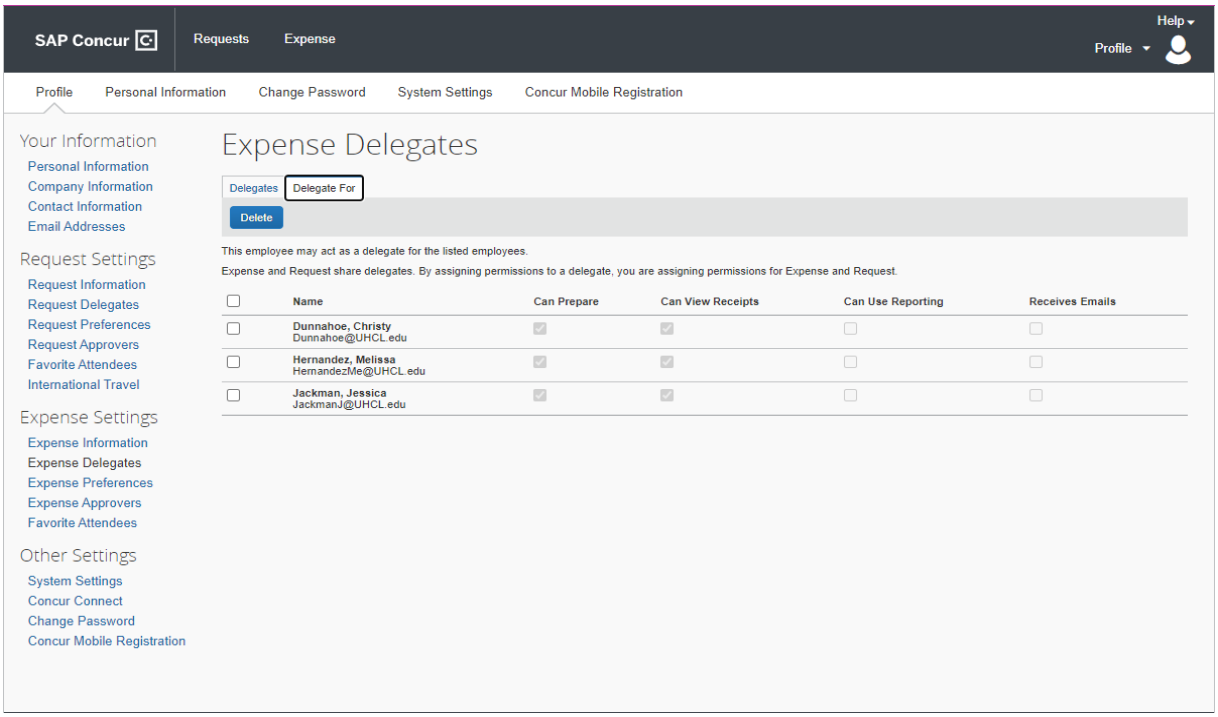


Click Add and then a search bar will appear. You can look up by last name, email address, employee id or login. Once you have the delegate selected then **Click** Add.



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.



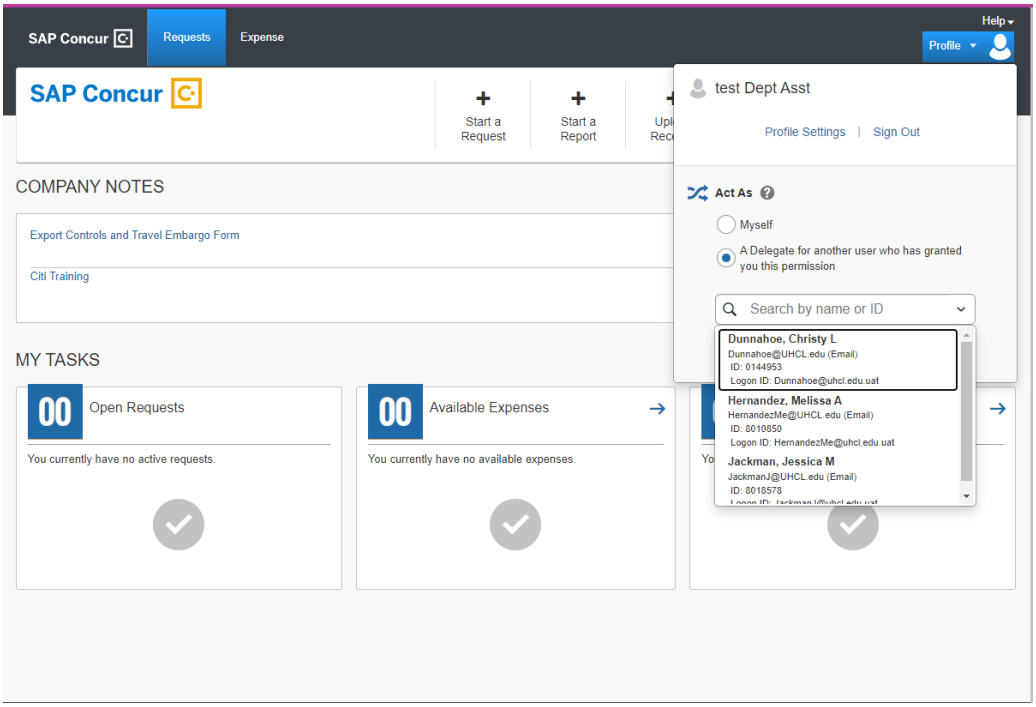
Delegate Role

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**.

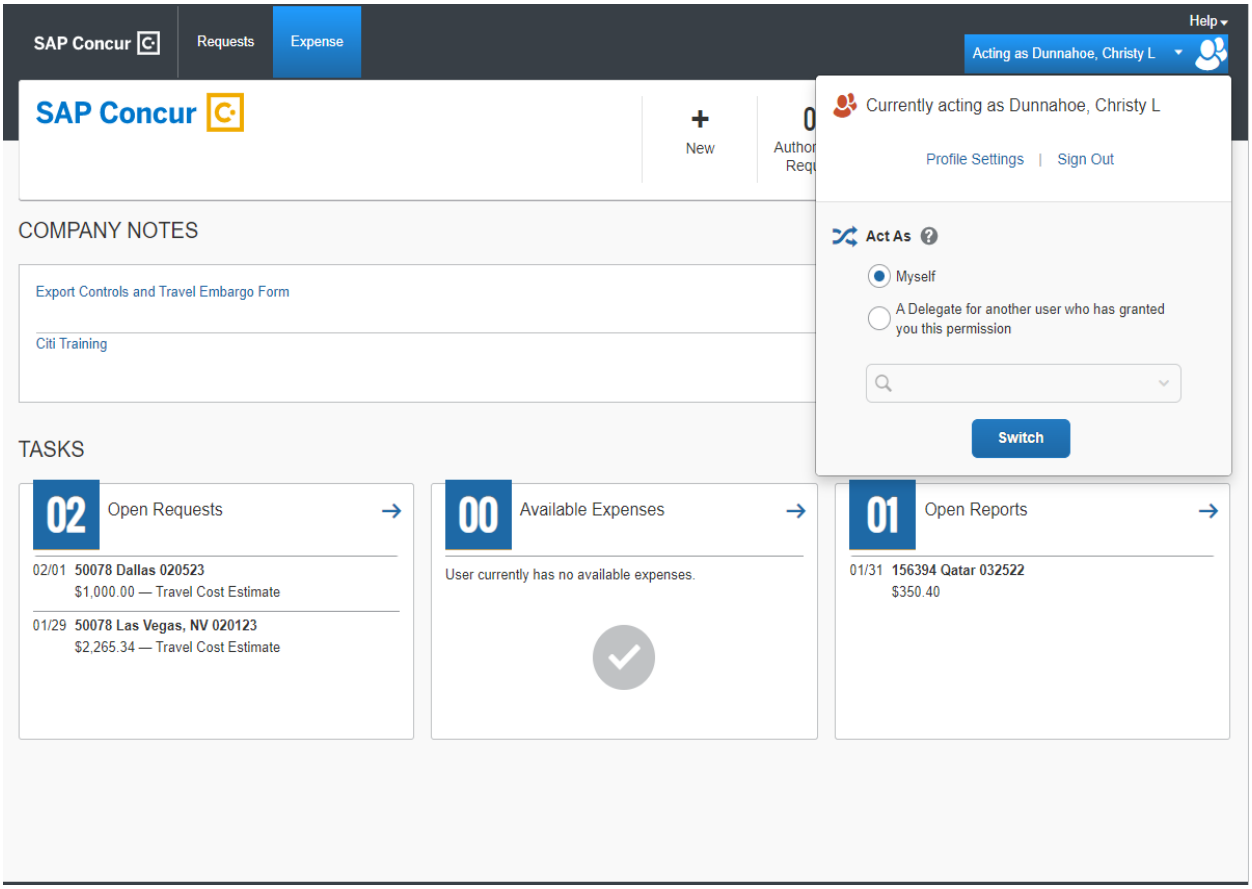
The delegate can type in the last name of the traveler they are a delegate for, or they can use the drop-down arrow and will be given a list of Travelers they have been given permissions to delegate for and select from the list. Then **Click** Switch.



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**.

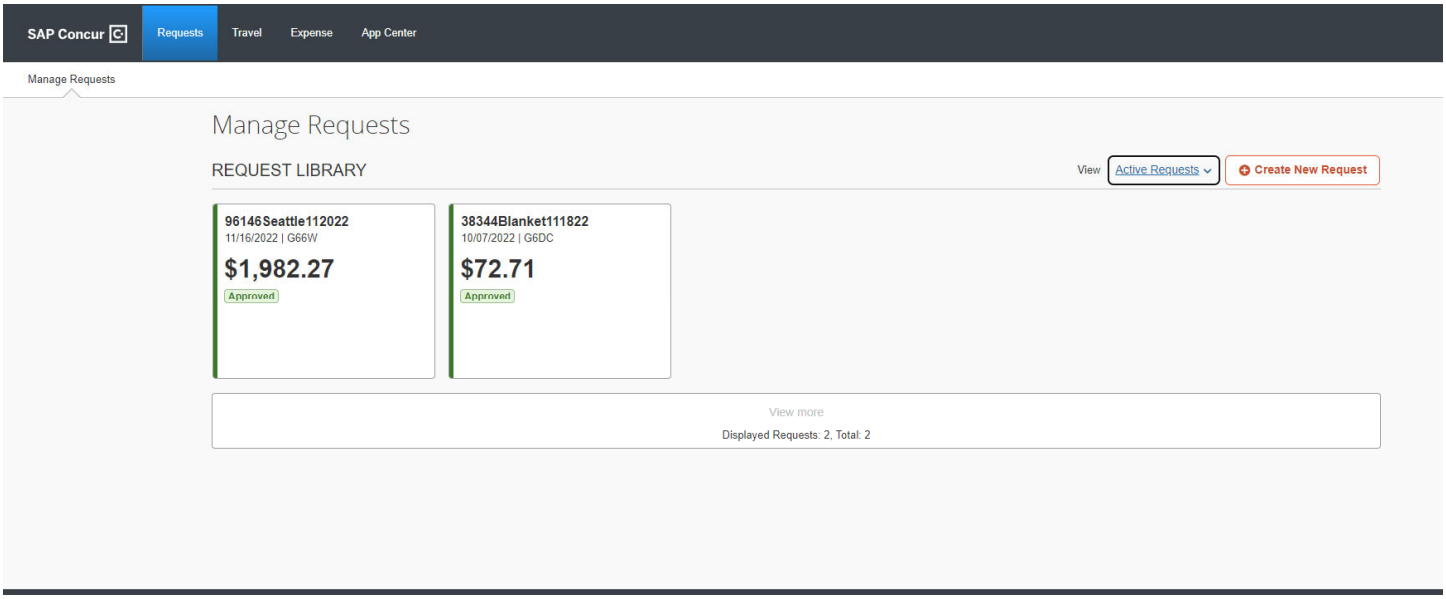
Then **Click** Switch.



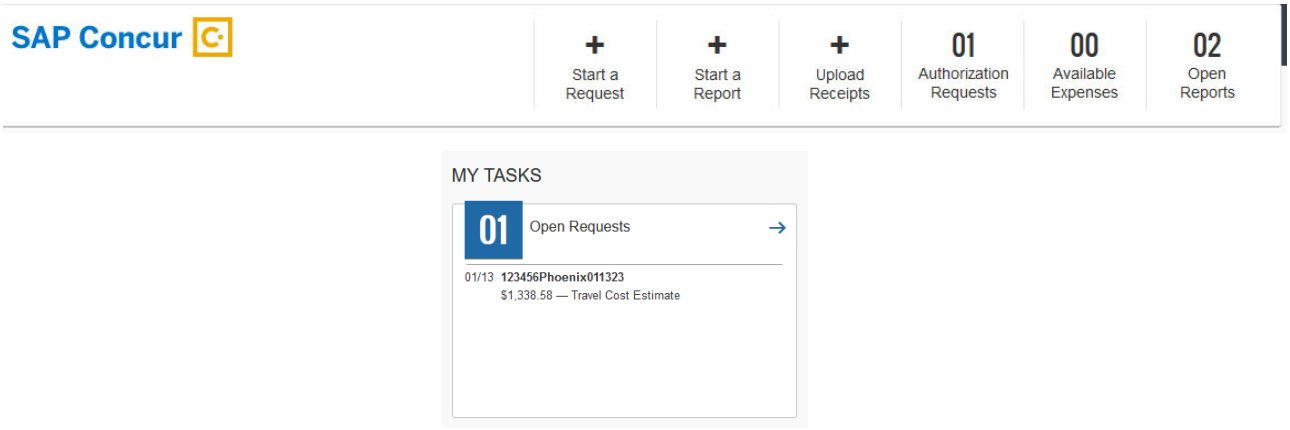
Requesting Travel

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.

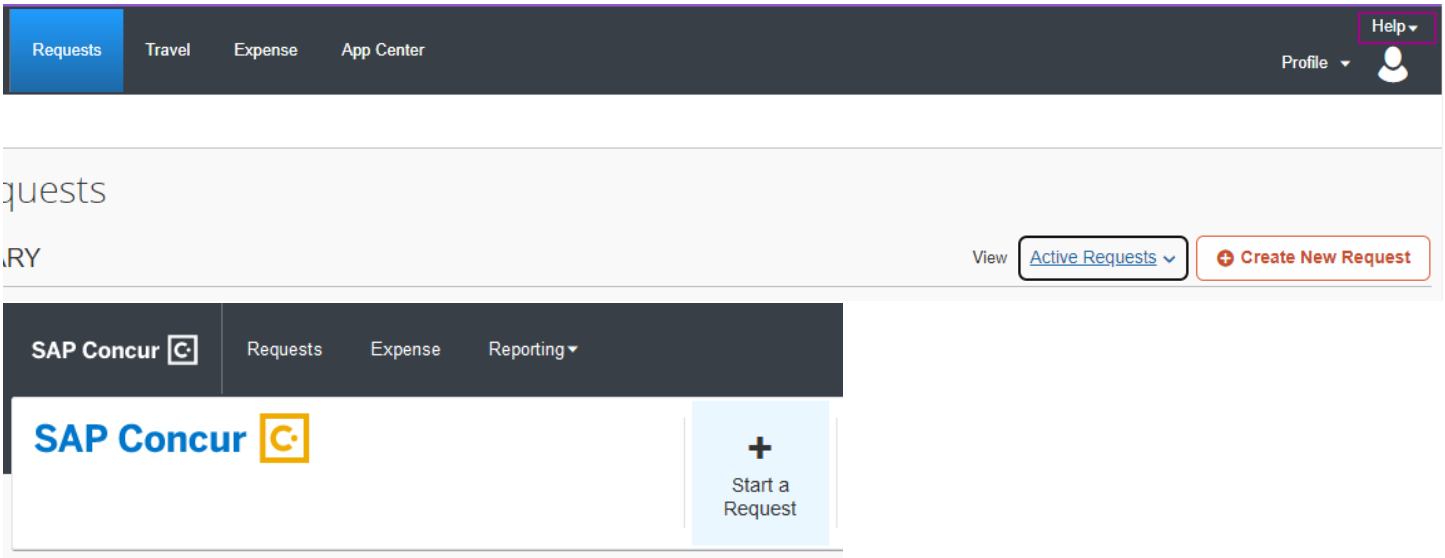


From the Home page, **Clicking** Authorization Requests or Open Requests will also take the Traveler to the Request page.



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.

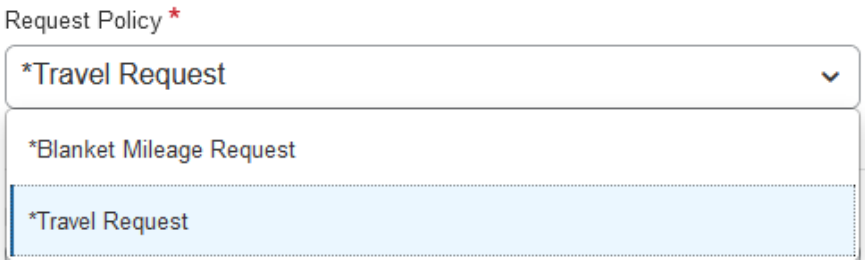


Request Policy - **This Automatically defaults to the Travel Request Policy!**

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

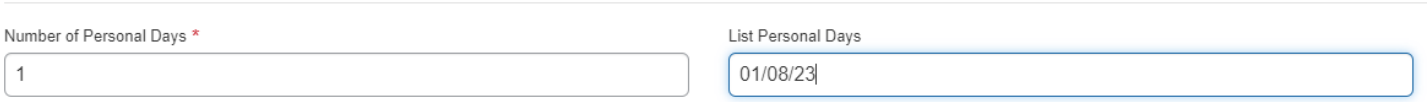
Last Date of Travel - MM/DD/YYYY **(*Example*: 01/01/2023)**

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)

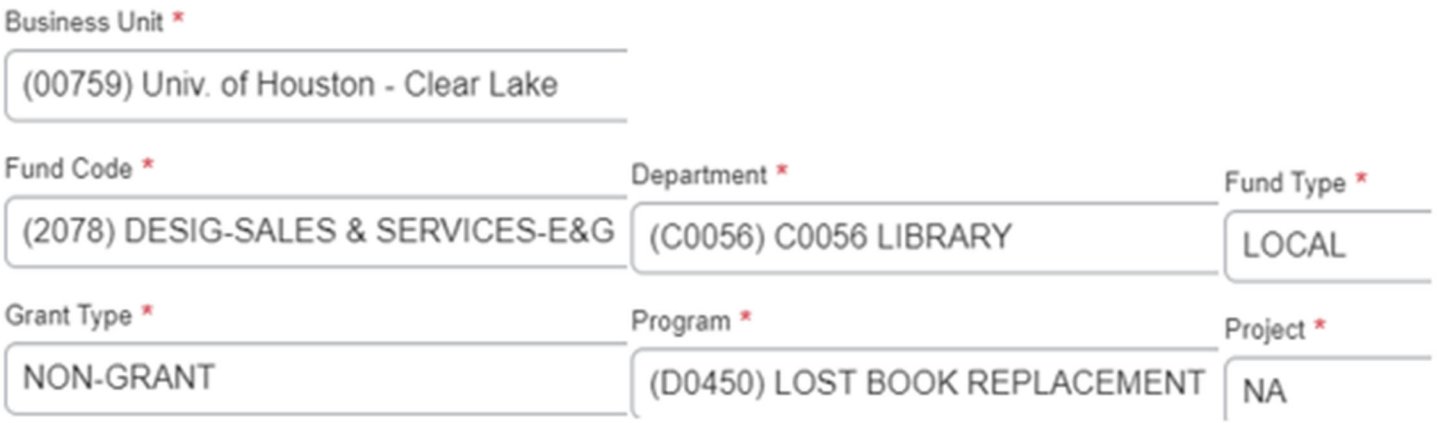


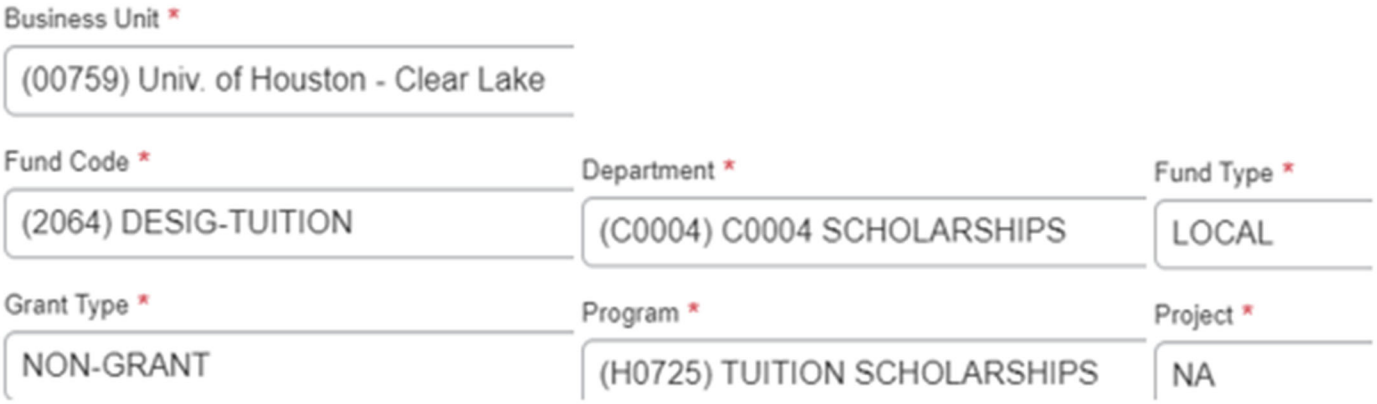
Purpose of Travel - Select drop-down arrow and **select** purpose that most closely aligns with travel

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

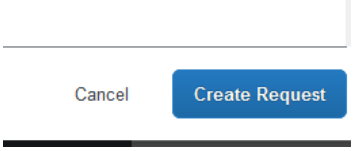
Cost Center Information

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





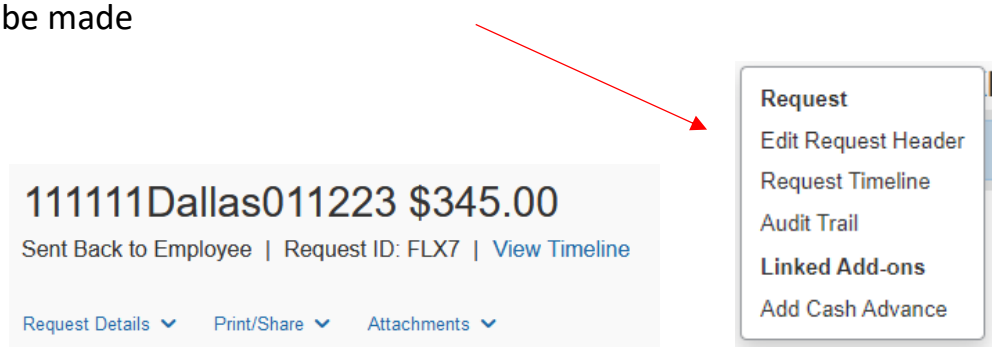
Once all information is entered, **Click** Create Request at the bottom right of the form. This will take you to the Expected Expenses page.



Expected Expenses

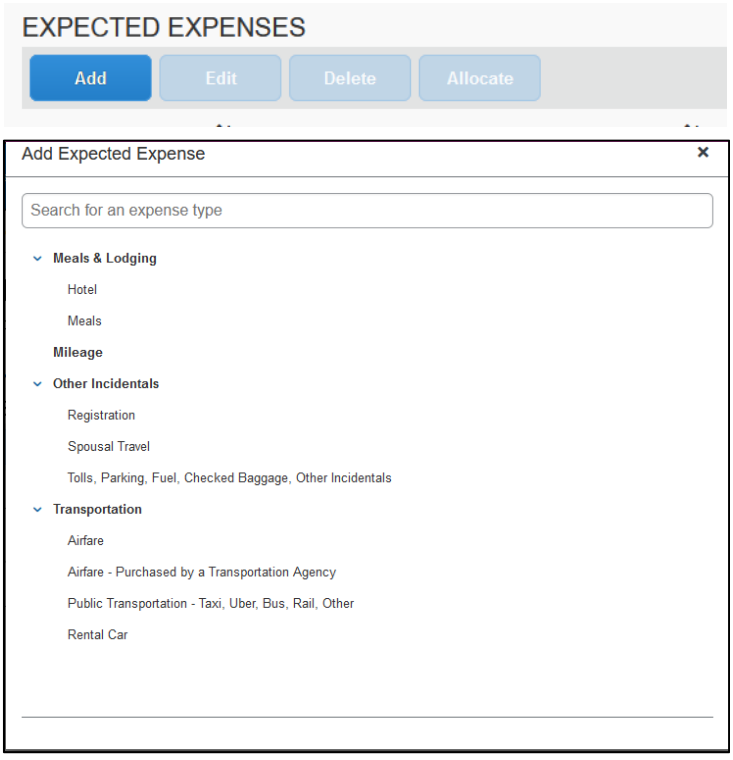
On the Request Header **Click** the drop-down arrow next to Requested Details. The traveler can select from the menu to view the approval flow through Request Timeline, Audit Trail, and the Allocation Summary of the expected expenses.

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

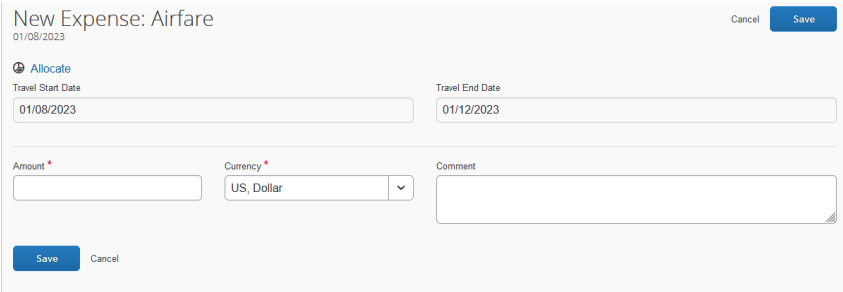


Adding expected expenses

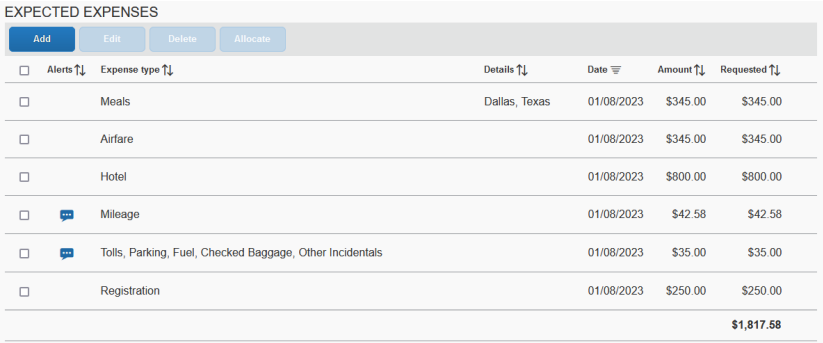
Click Add. A selection of expenses will appear. **Click** on the expense type that will be added to the request.



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



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

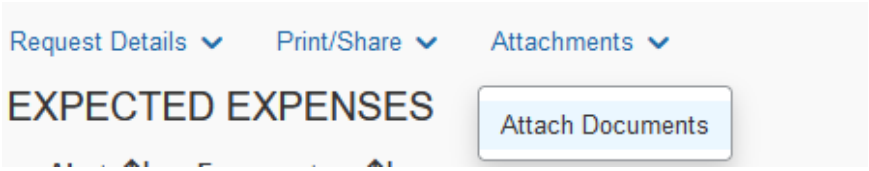


Alerts	Expense type	Details	Date	Amount	Requested
	Meals	Dallas, Texas	01/08/2023	$345.00	$345.00
	Airfare		01/08/2023	$345.00	$345.00
	Hotel		01/08/2023	$800.00	$800.00
	Mileage		01/08/2023	$42.58	$42.58
	Tolls, Parking, Fuel, Checked Baggage, Other Incidentals		01/08/2023	$35.00	$35.00
	Registration		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.

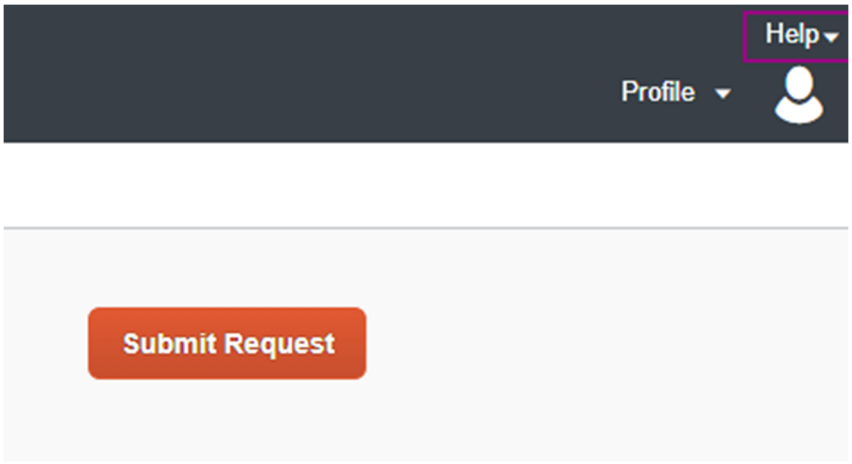
Foreign Travel requires both the completed Export Controls and Travel Embargo Form and CITI (Collaborative Institute of Training Initiatives) program certificate.

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.

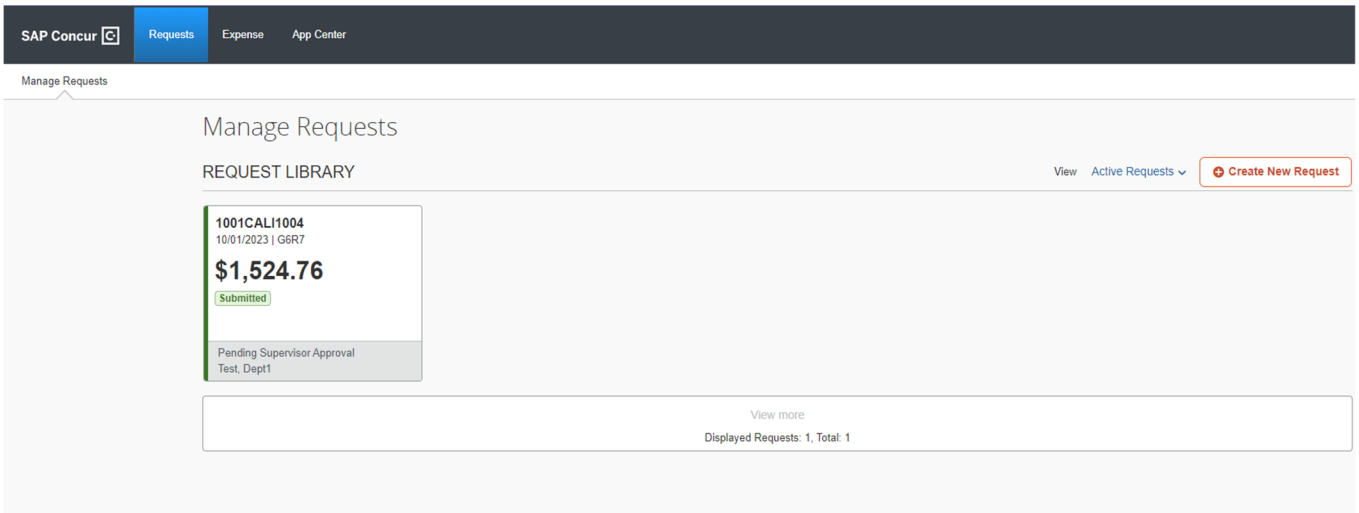


Submit Request

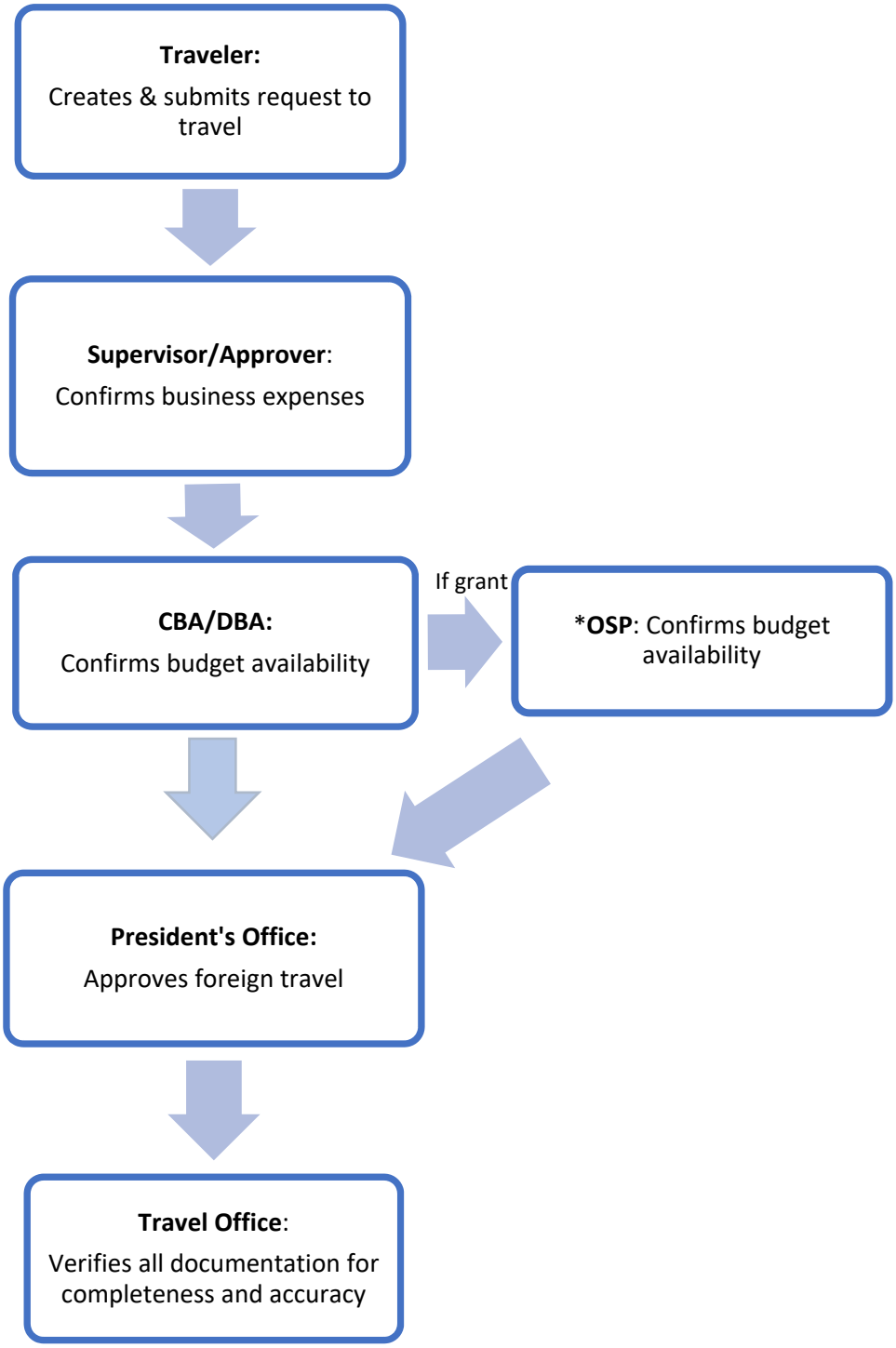
Click Submit Request at the Right top of the form. This will enter the request into the approval workflow.



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



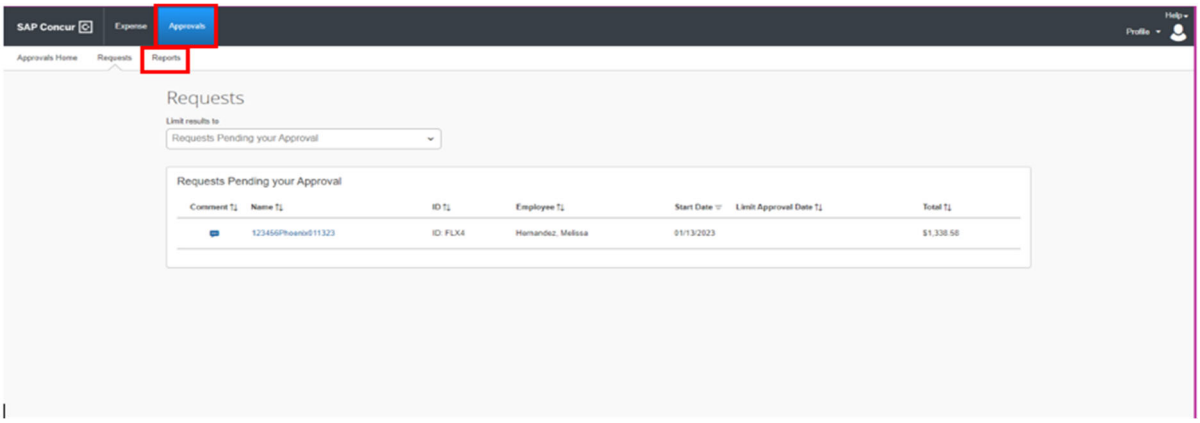
Request Approval Workflow



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

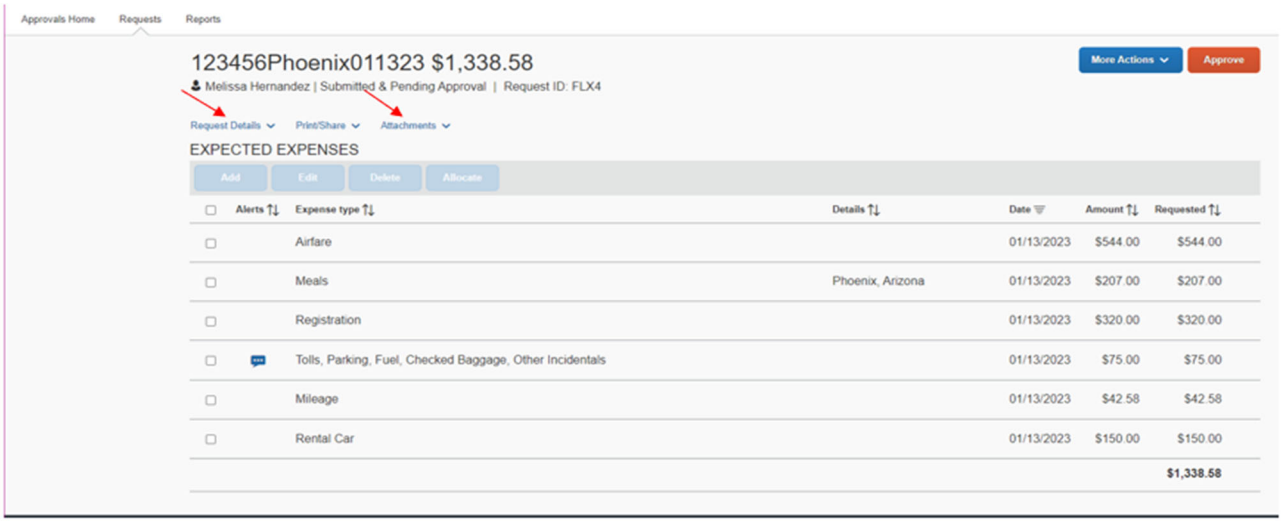
Request Approval

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.

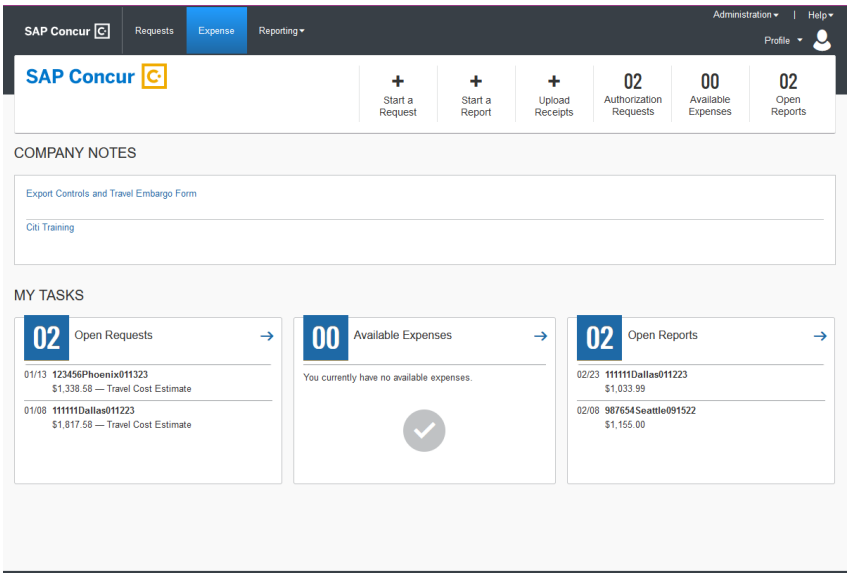


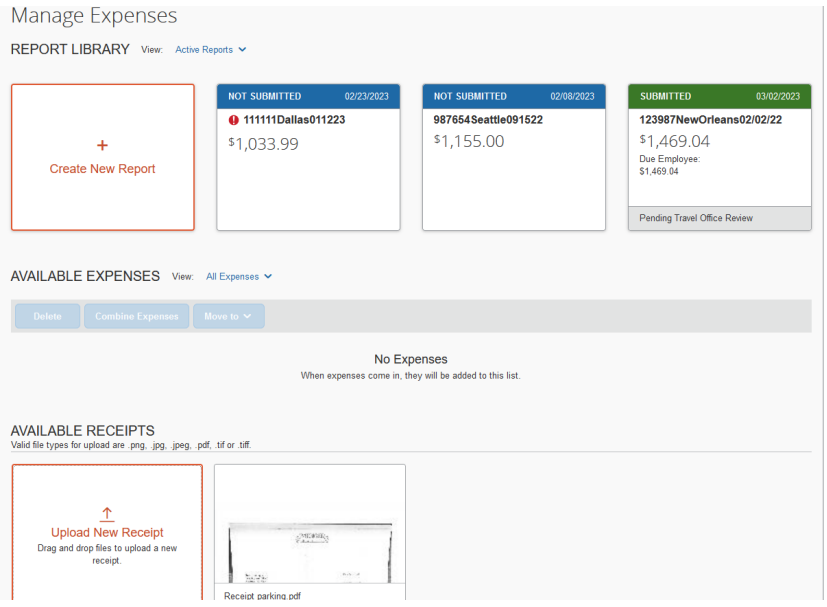
Expense Reporting

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

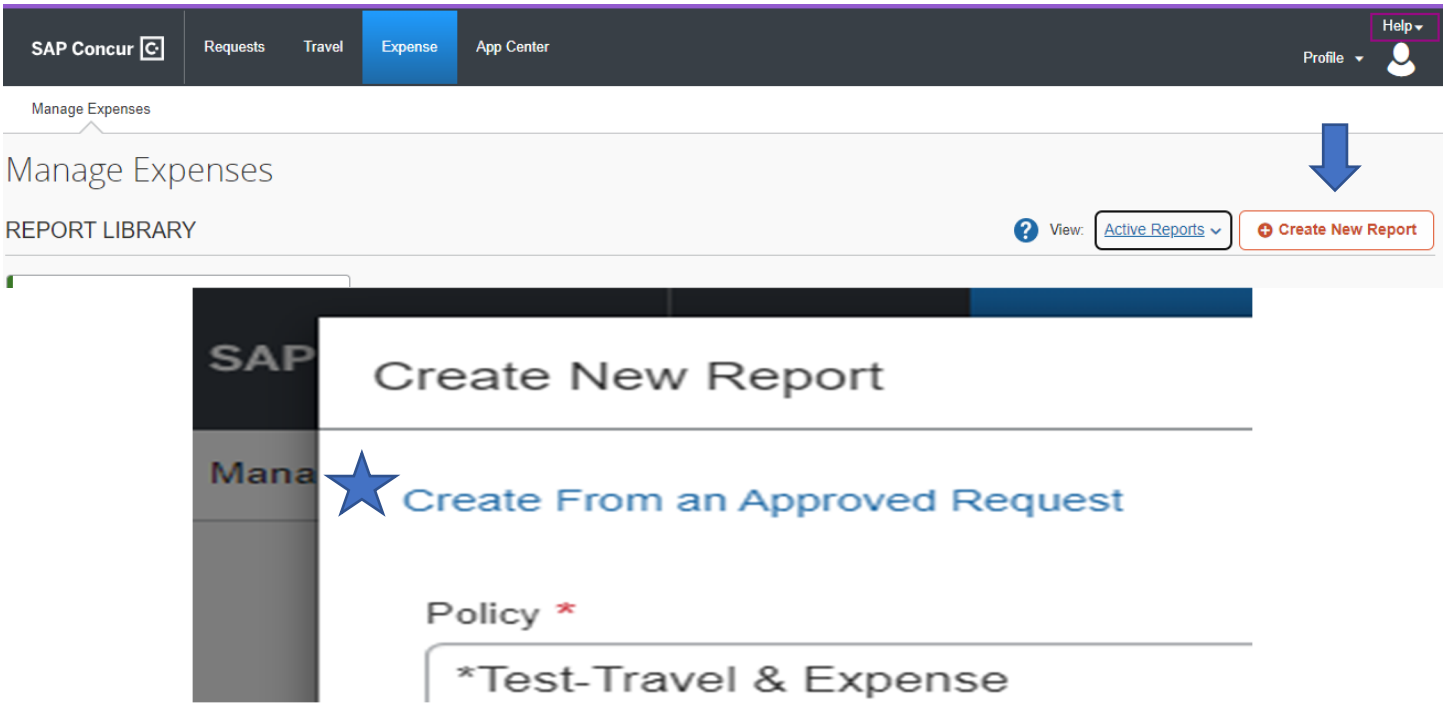


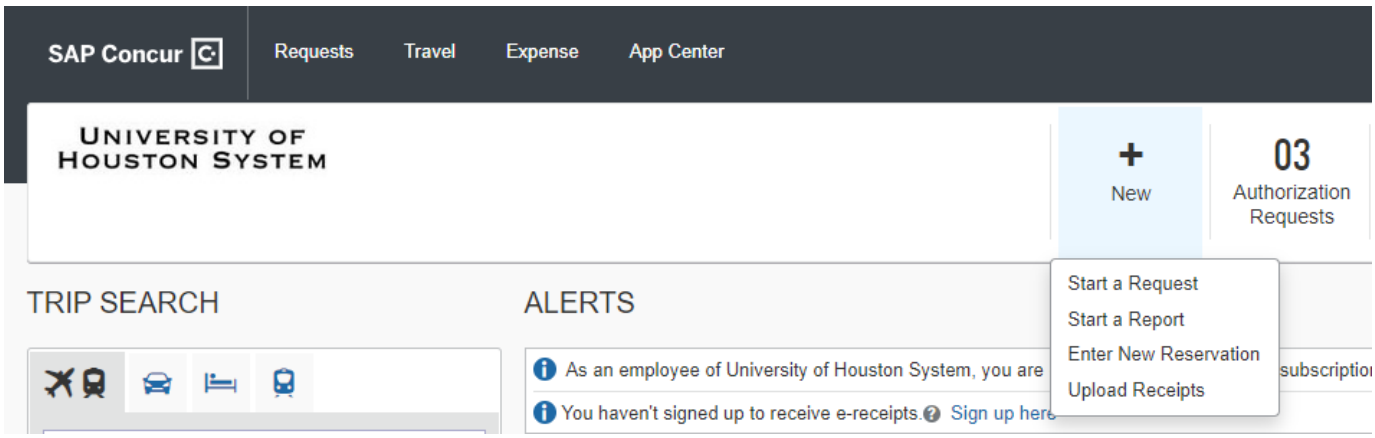


Report

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 ★



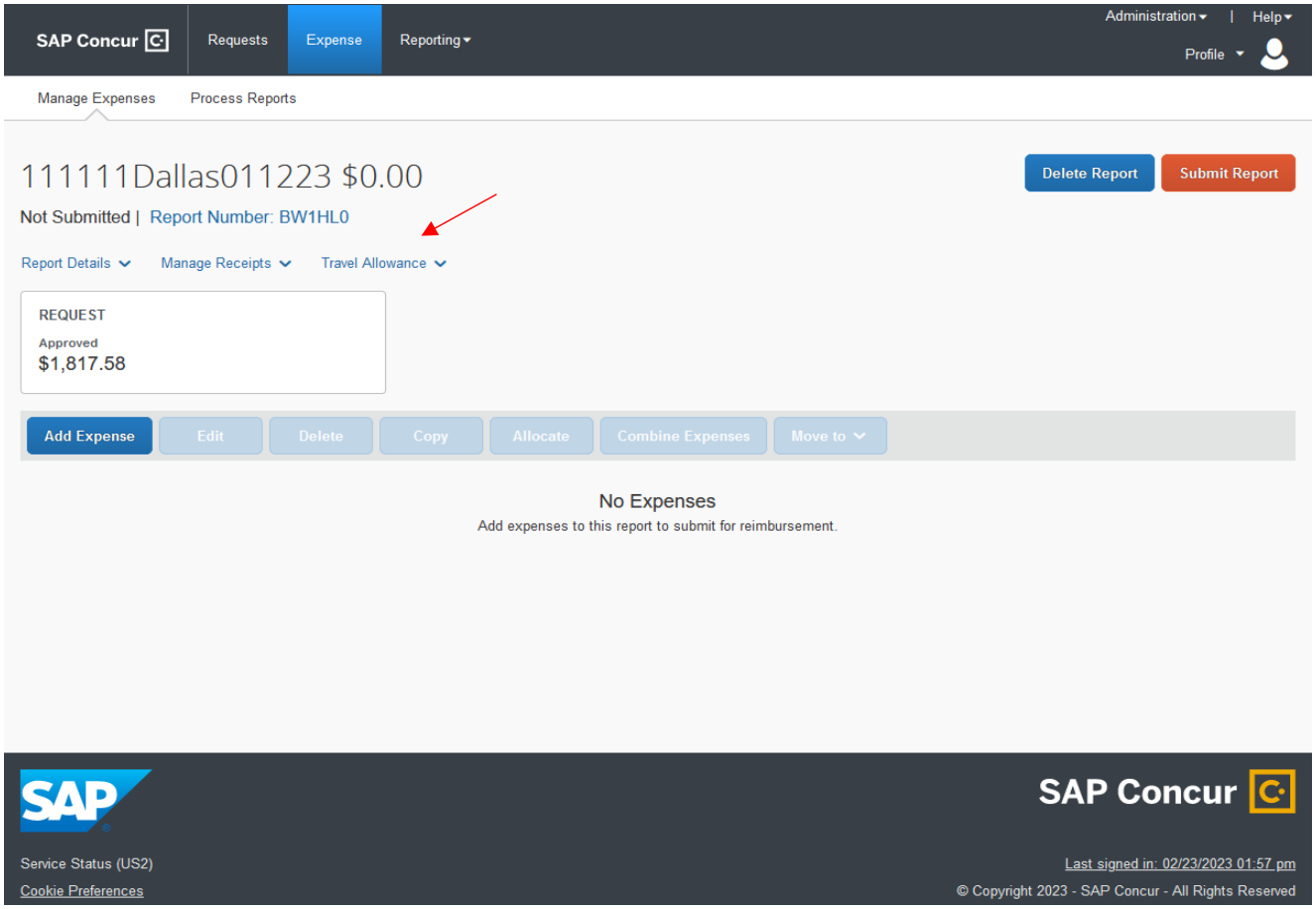


A pop-up box will appear listing available approved invoices to choose from to create an expense report. Select the report by selecting on the left side of the report Request Name and then Create Report.

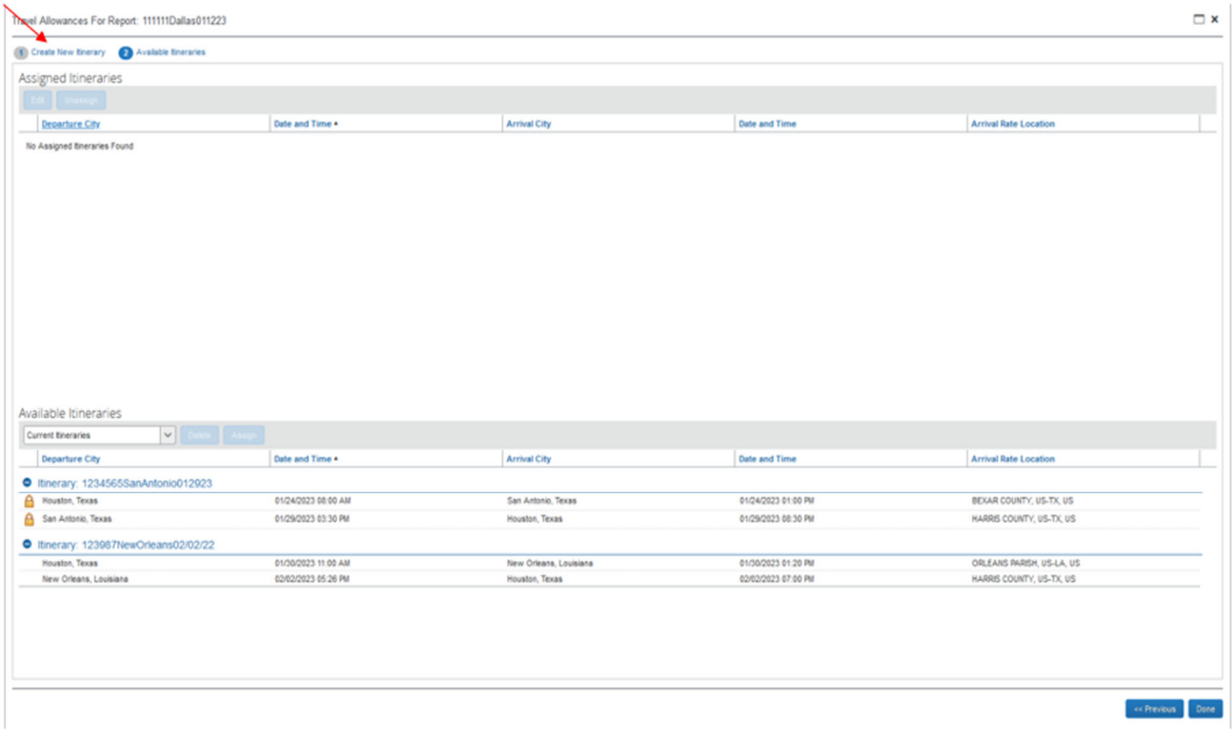
Calculated Travel Allowance for Daily GSA (General Services Administration) Lodging and Meals.

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



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



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**)

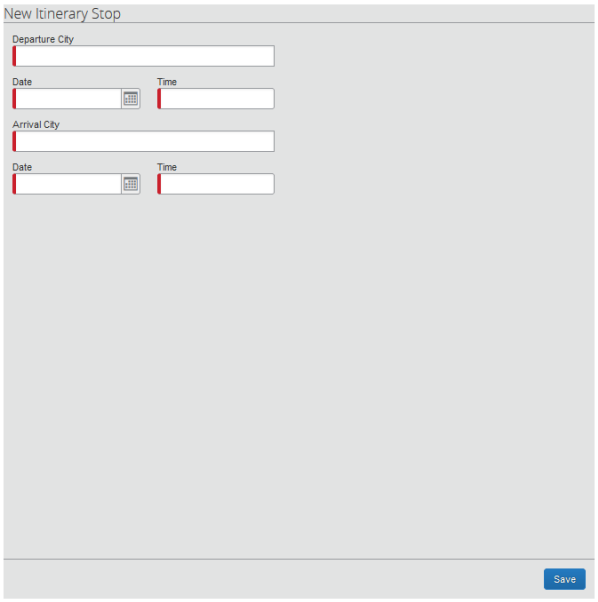
Click Save at the bottom right.

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.

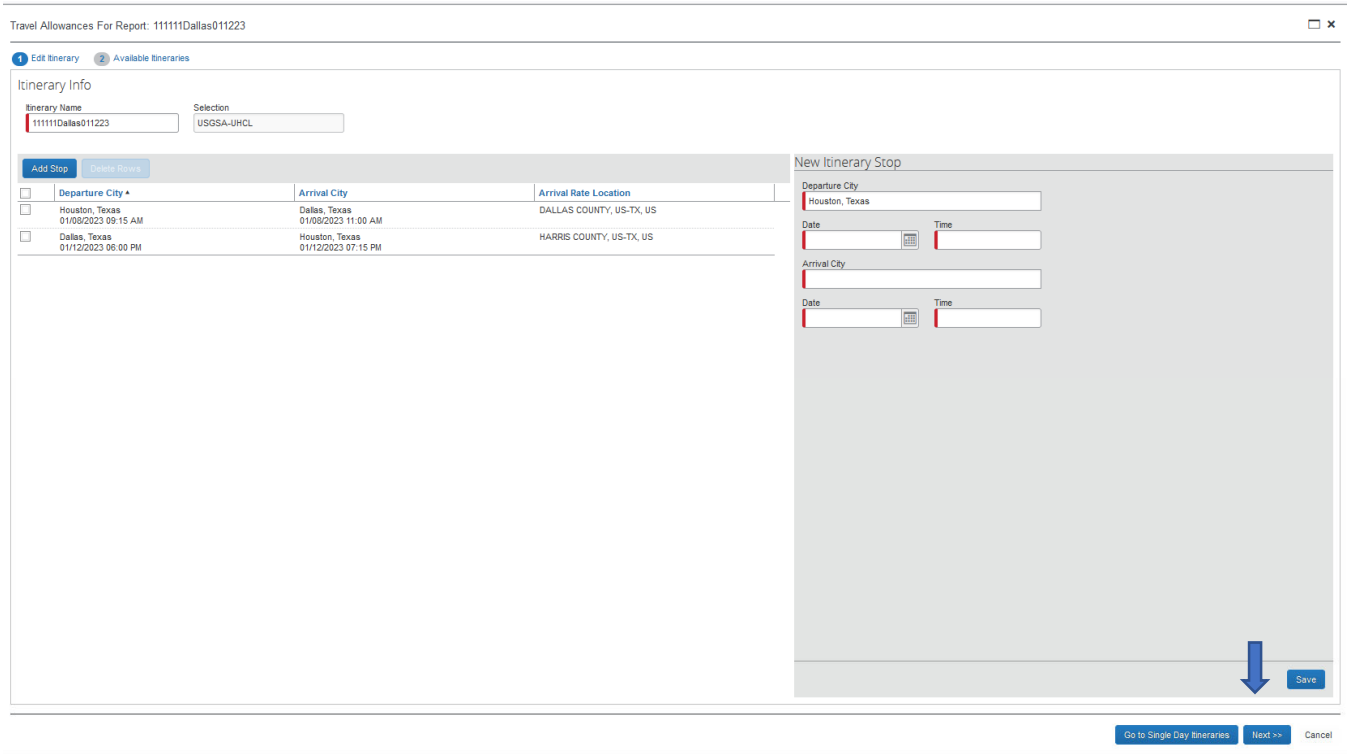
Complete the form by including the Departure City, Date and Time and the Arrival City, Date, and Time.

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

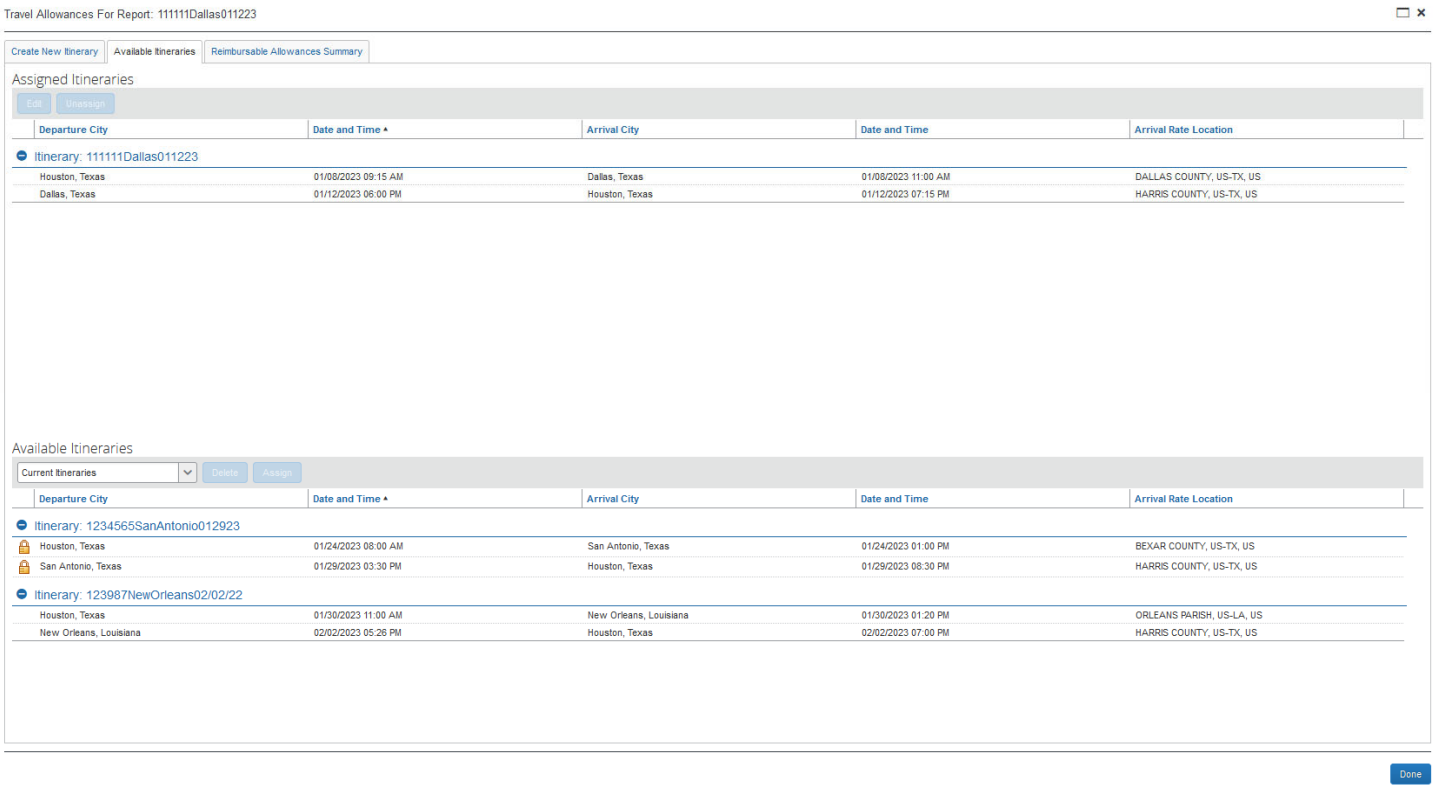
The saved trip segments appear on the left side of the screen and can be edited by **Clicking** on the row of the segment that needs editing



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

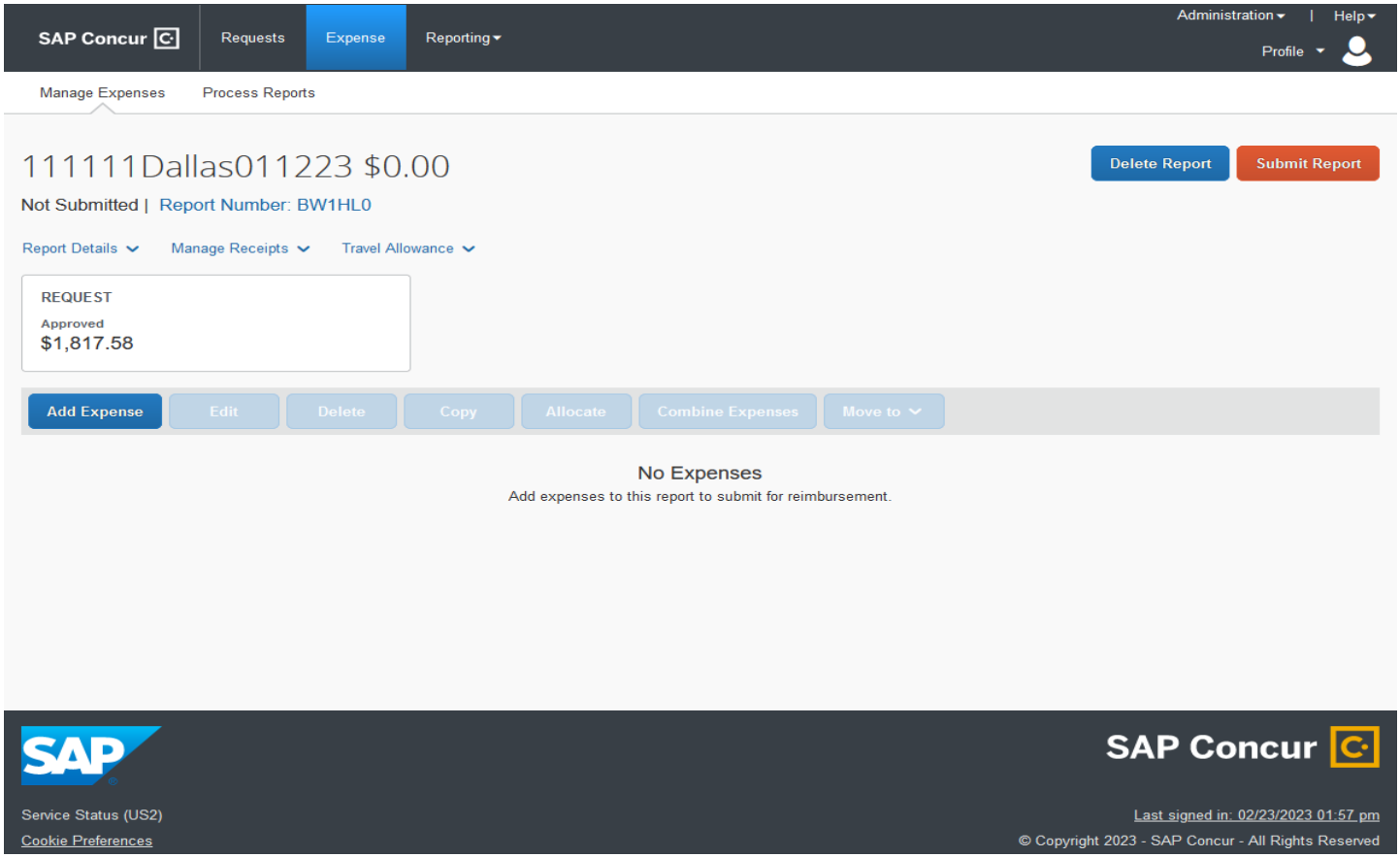


The Travel Itinerary has been added to Assigned Itineraries, **Click** Done at the bottom right of the screen.



Add Each Expense Type

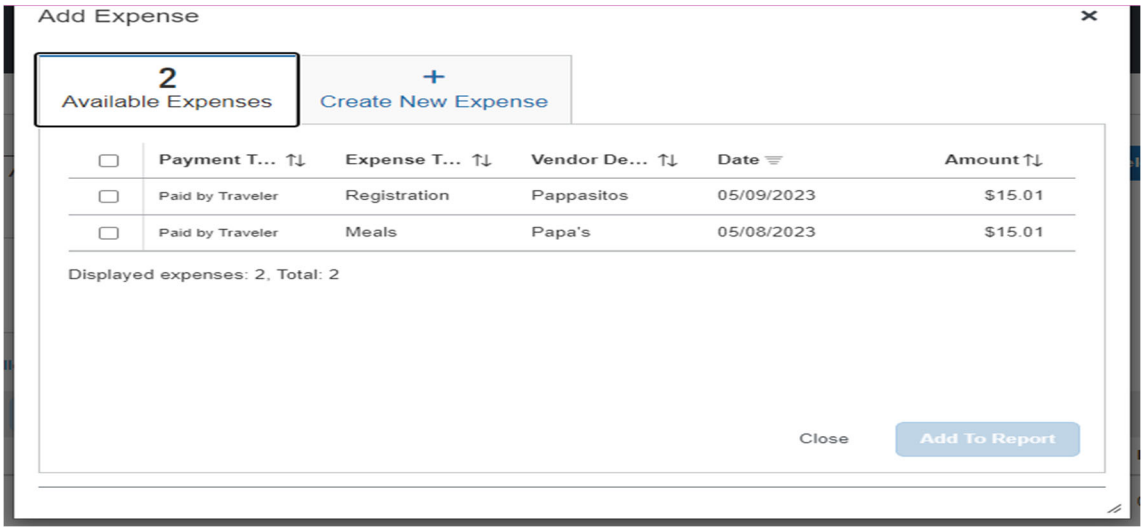
Begin adding expenses by **Clicking** Add Expense

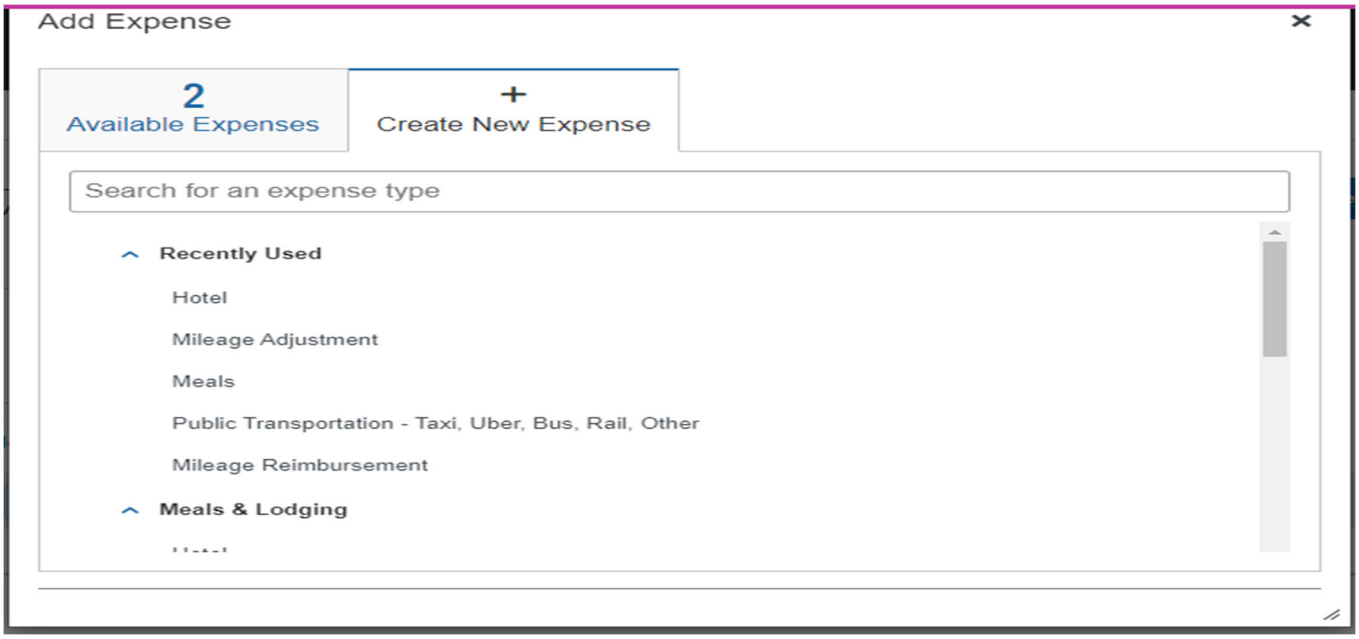


If there are saved receipts in the Traveler's Wallet or Travel Card charges available to be added to a report, the traveler will see a box pop up. The traveler can choose to add an available expense by selecting the expense and then **Clicking** Add to Report.

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.

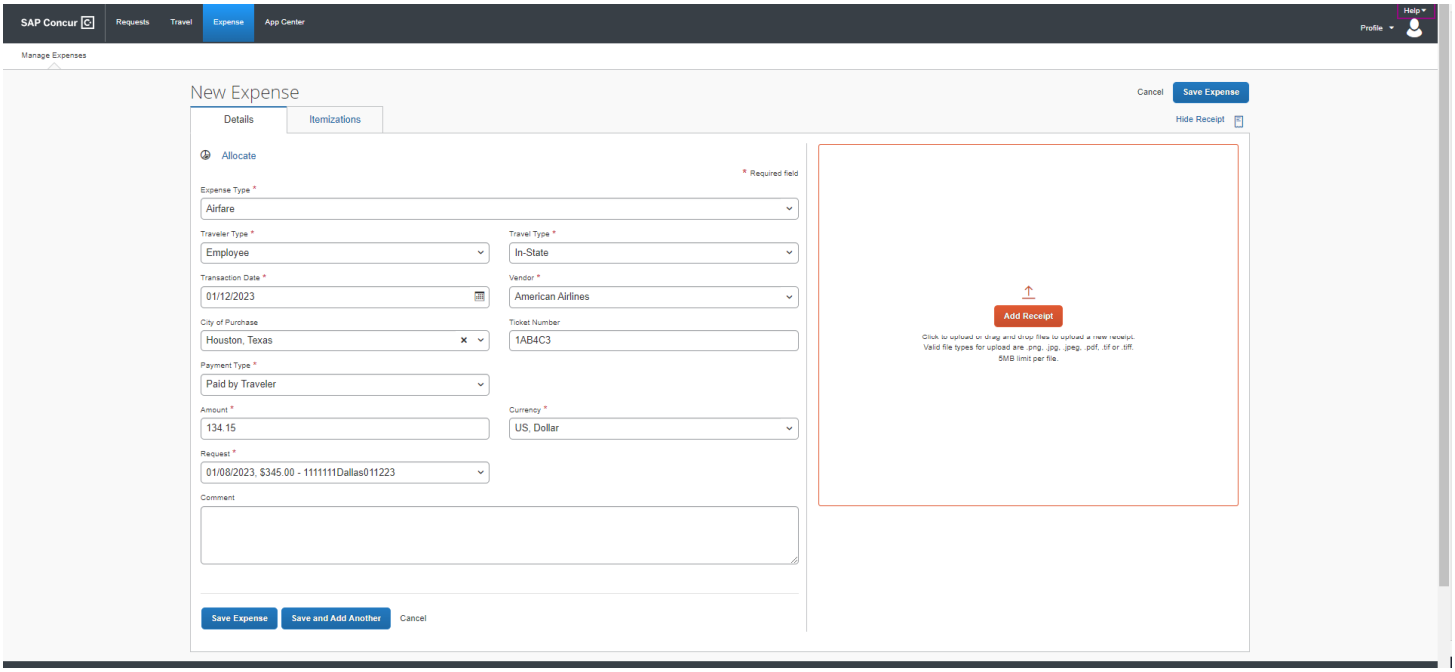




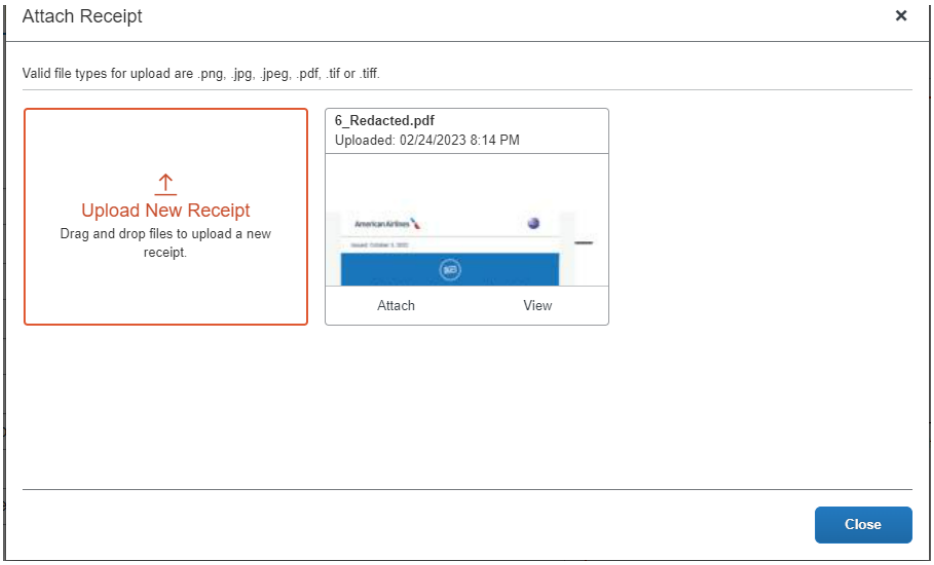
Airfare Expense

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

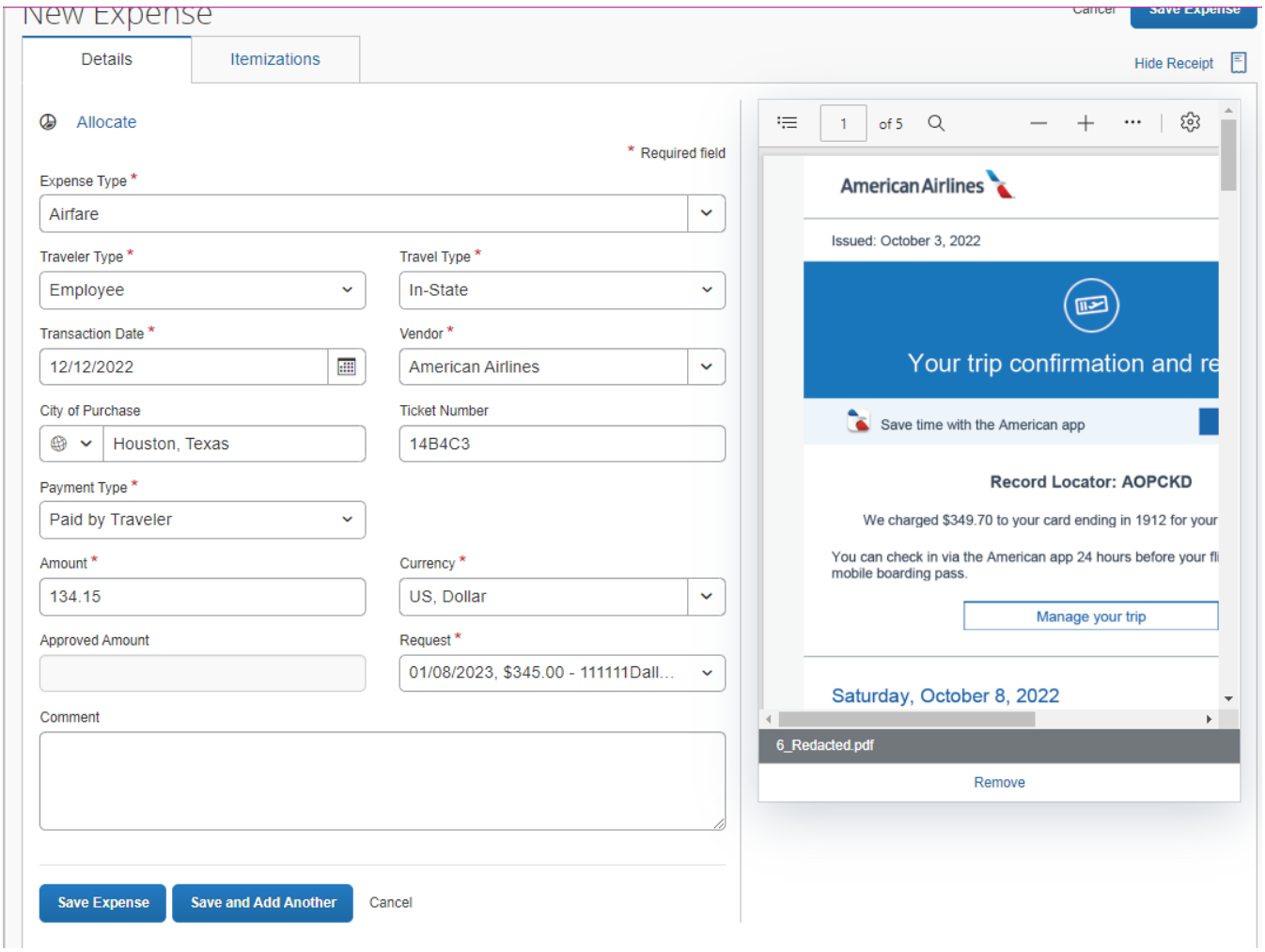
Then **Click** add receipt



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



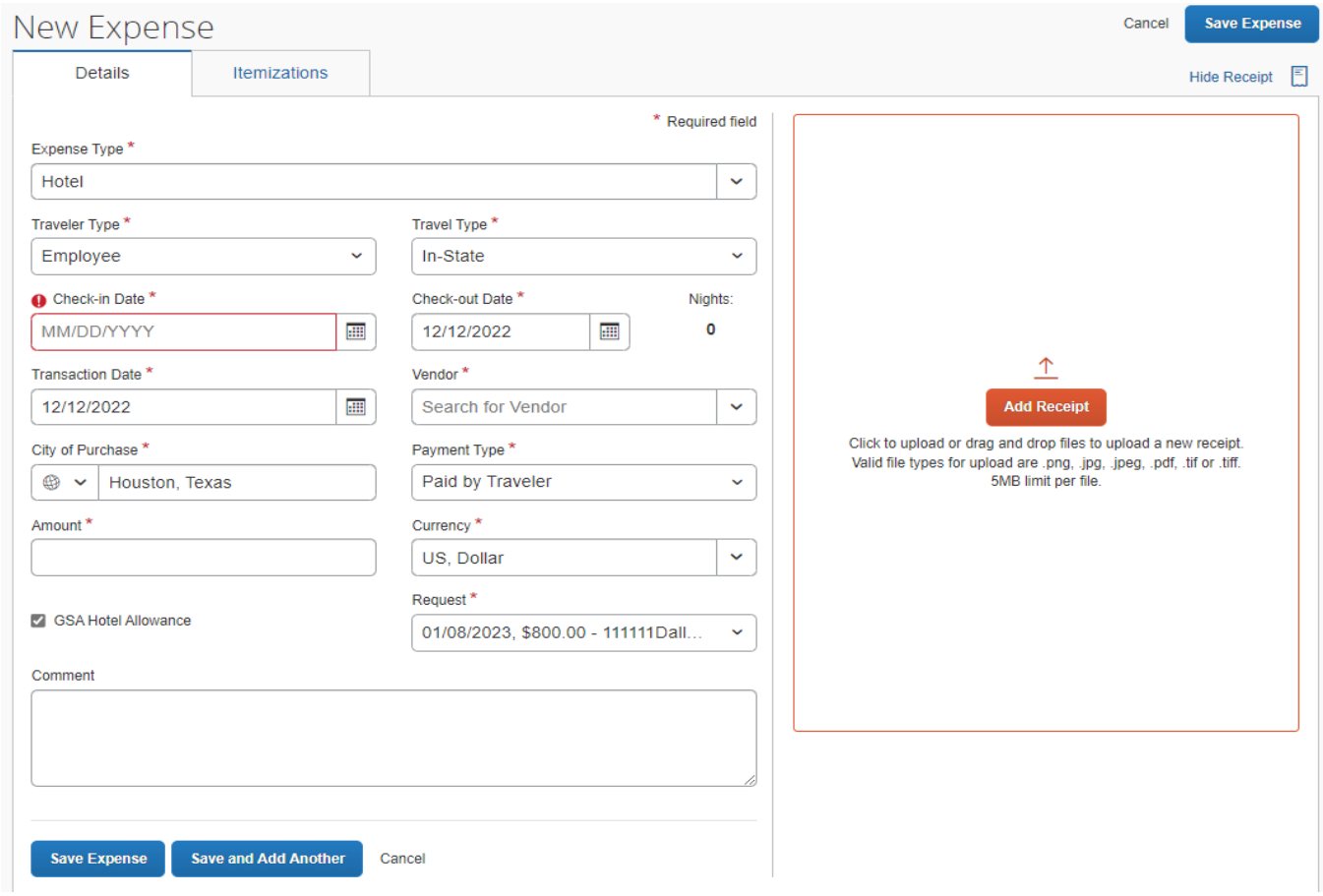
Once the receipt has been attached, **Click** Save Expense



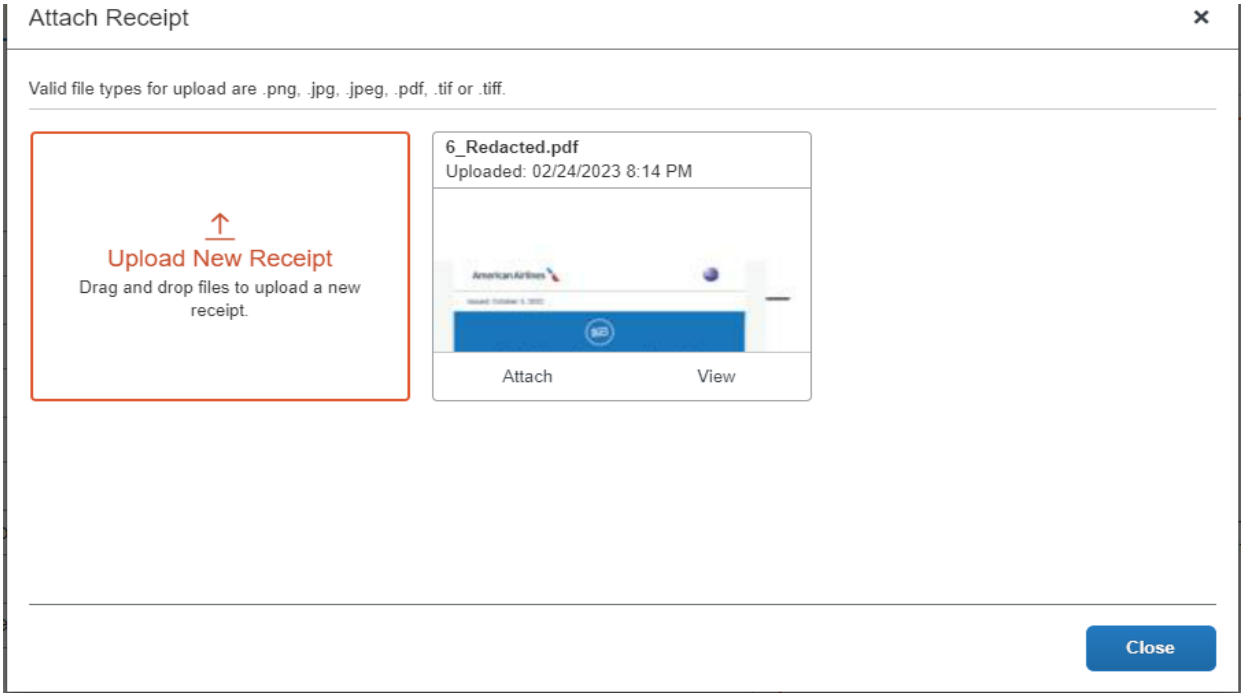
Hotel Expense

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

Click add receipt

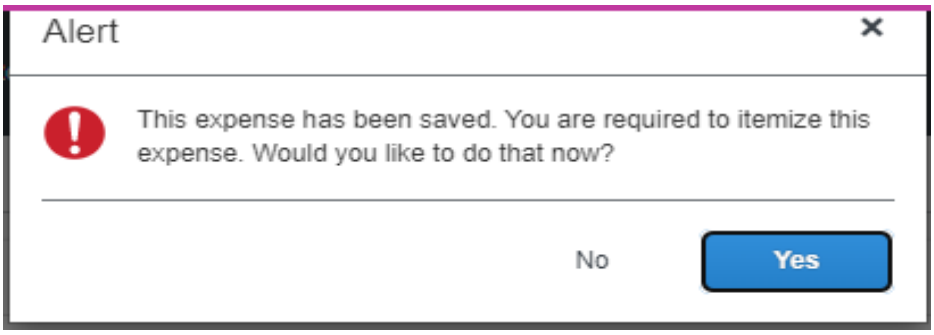


Click upload New Receipt and use a previously scanned receipt or a saved receipt from the traveler's wallet, then **select** the saved receipt.



Click Save Expense

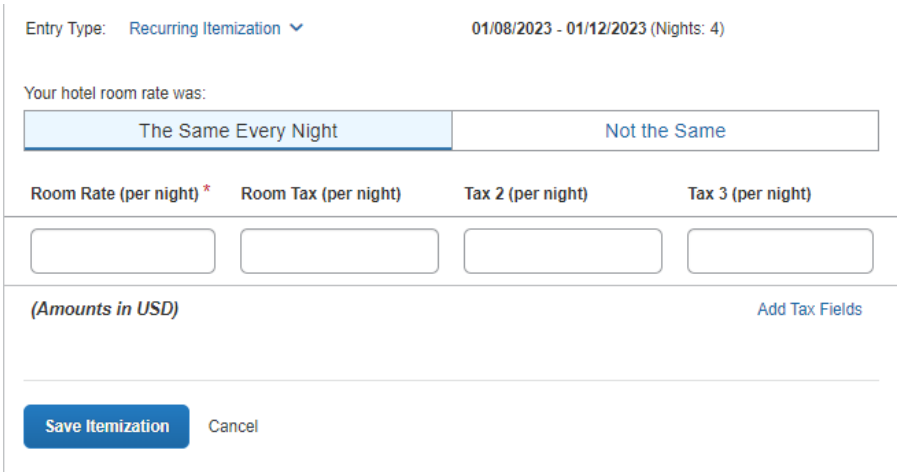
The system will pop a box advising the hotel charge will need to be itemized. **Click** Yes.



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.

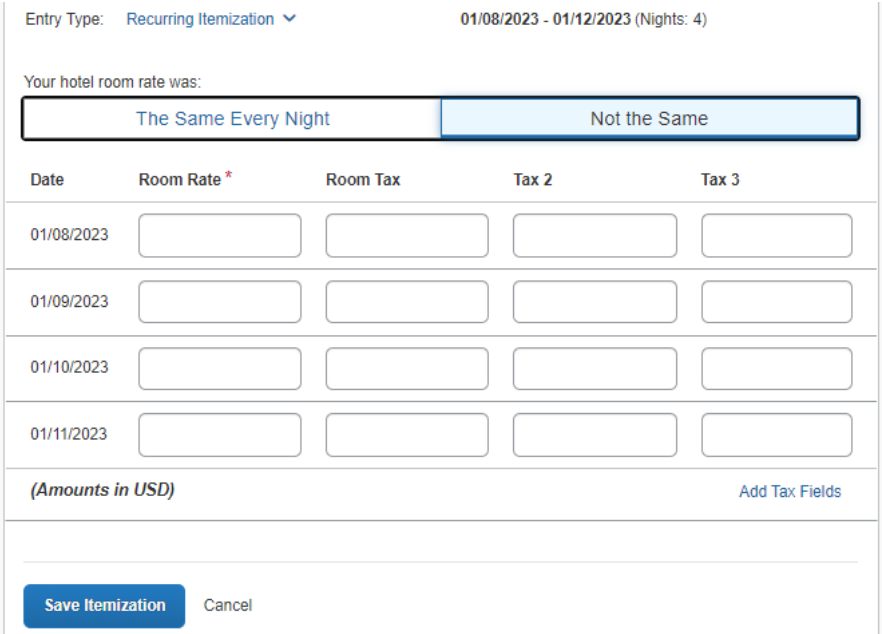
The Same <u>Every Night</u> – The rates for each night ***are*** charged the same.

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



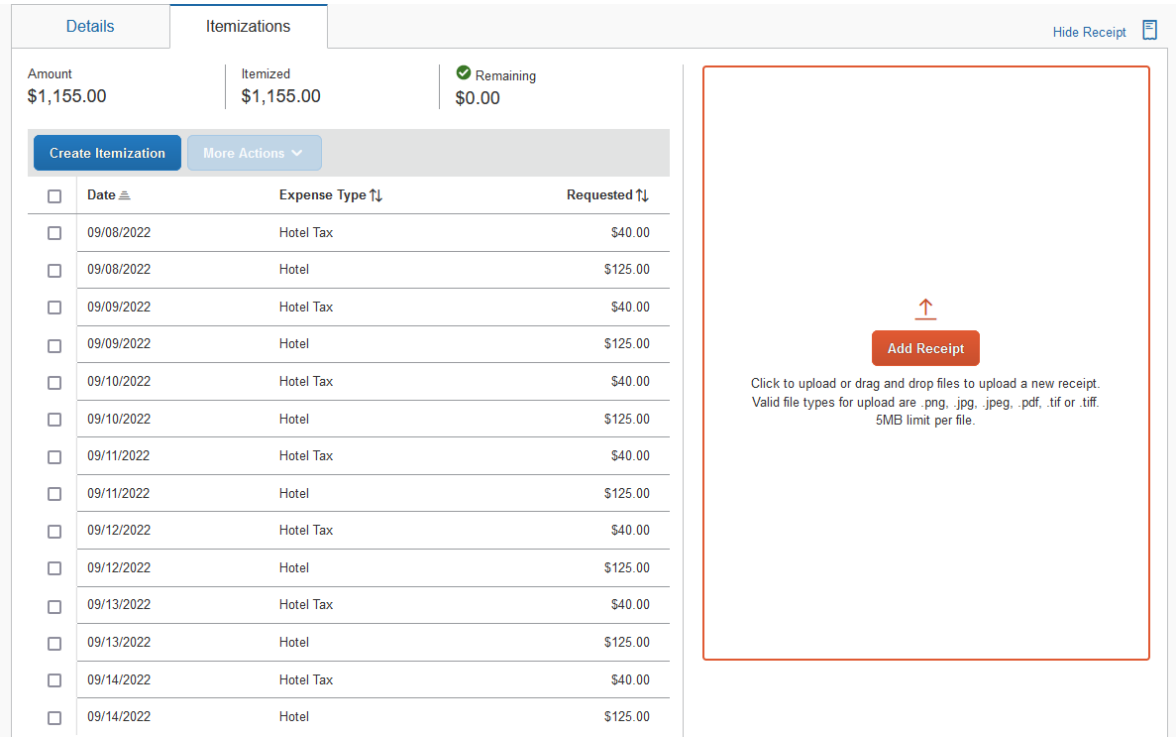
Not the Same – The rates for each night are ***not*** charged the same including taxes/fees

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

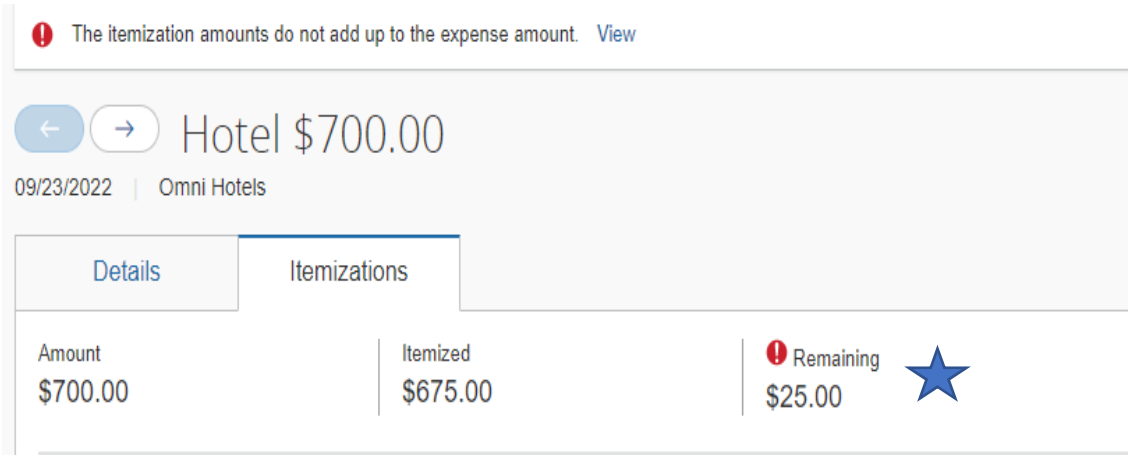


Once the itemizations have been entered, **Click** Save Itemization.

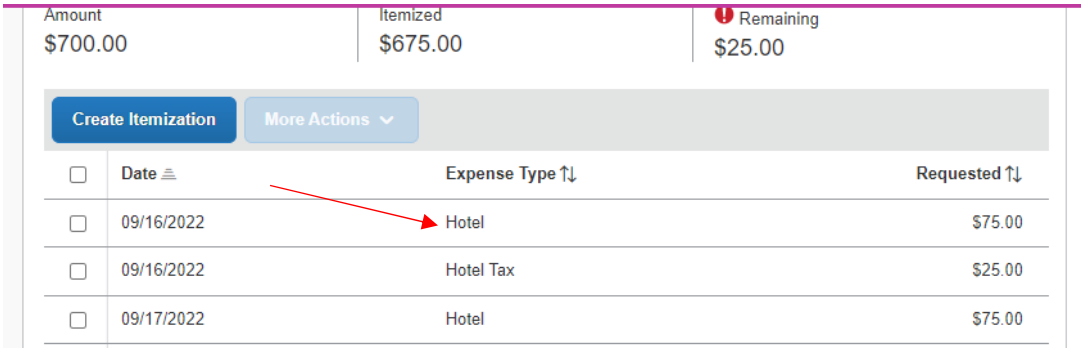
Concur will calculate the itemization and a listing of the expenses that were entered for hotel and hotel taxes will appear. At the top, is the total amount entered for the expense, the itemized total, and any remaining amounts that have not been accounted for.



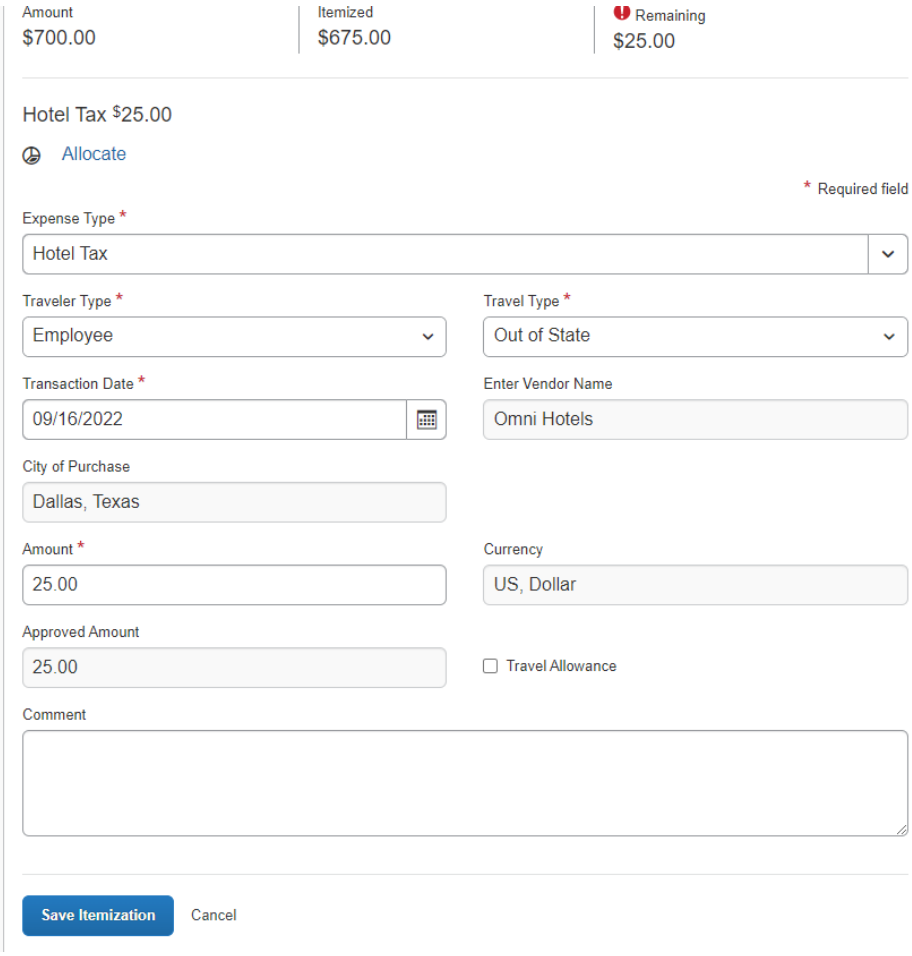
***** There should Not be a Remaining Amount. An error will appear. Verify that all itemized amounts are correct.***



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



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

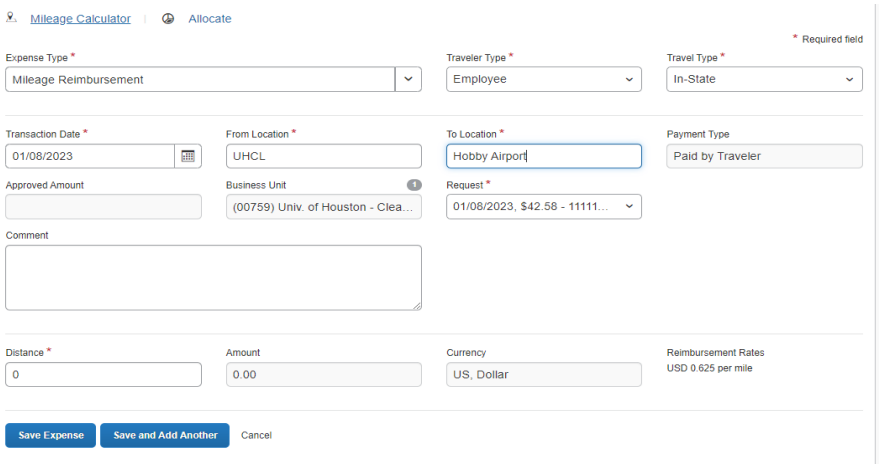


Once all amounts have been itemized, at the top right of the form **Click** Save Expense.

Mileage Expense

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

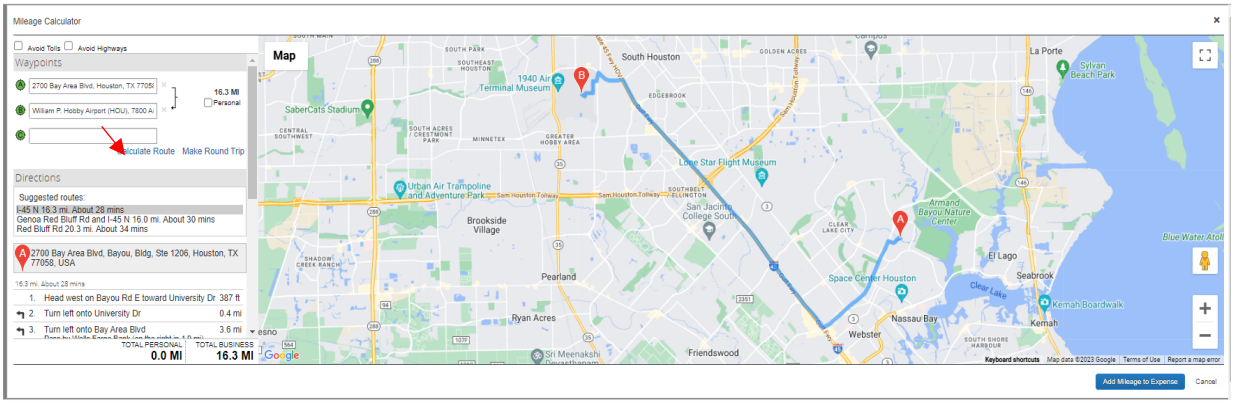
Comments - **For blanket mileage (local only) specify the purpose of each trip.**
***This is a very intuitive app. Entry can be by common destination names such as airports, schools, convention centers, landmarks, etc. (Examples: Dallas Convention Center, Minute Maid Park, Hobby Airport) or by address.**



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.

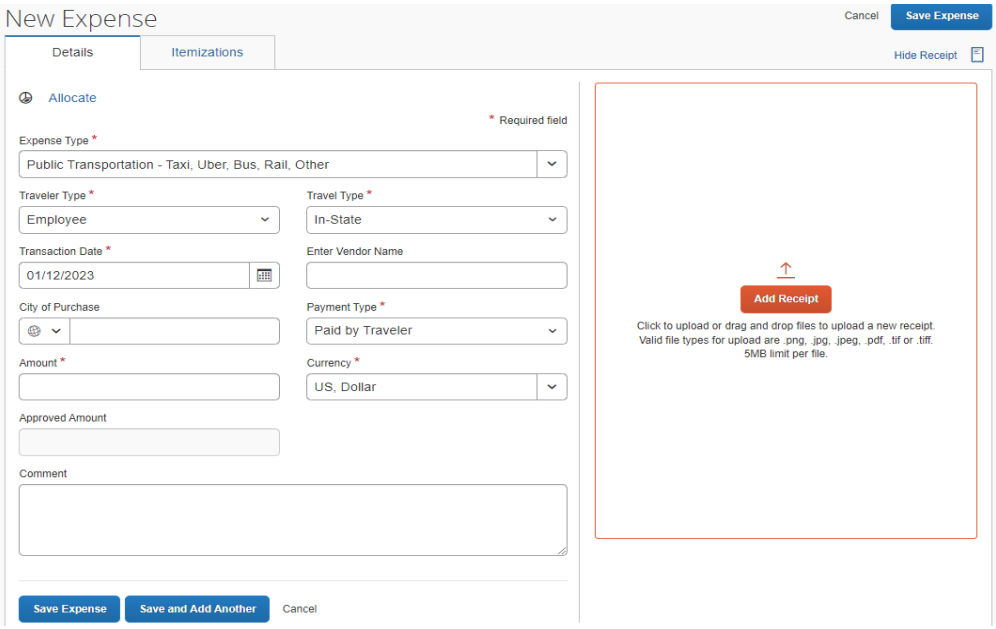


Once all stops have been entered **Click** Add Mileage to Expense.

Click Save Expense

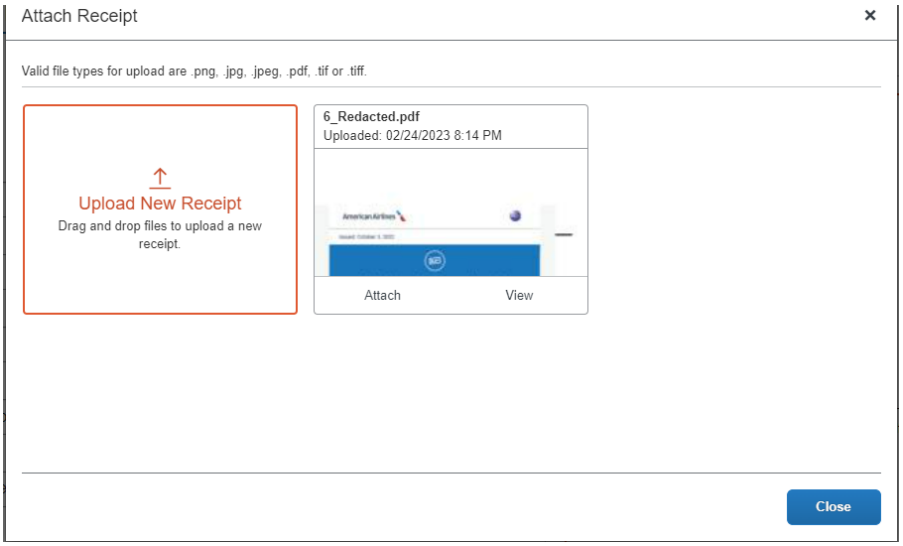
Public Transportation Expense

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.



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.

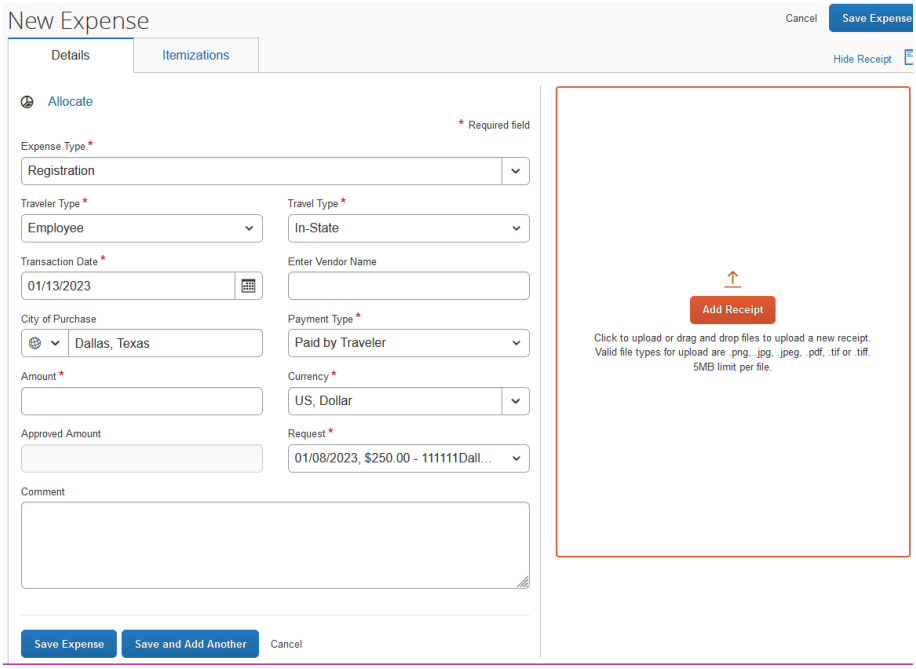


Registration Expense

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

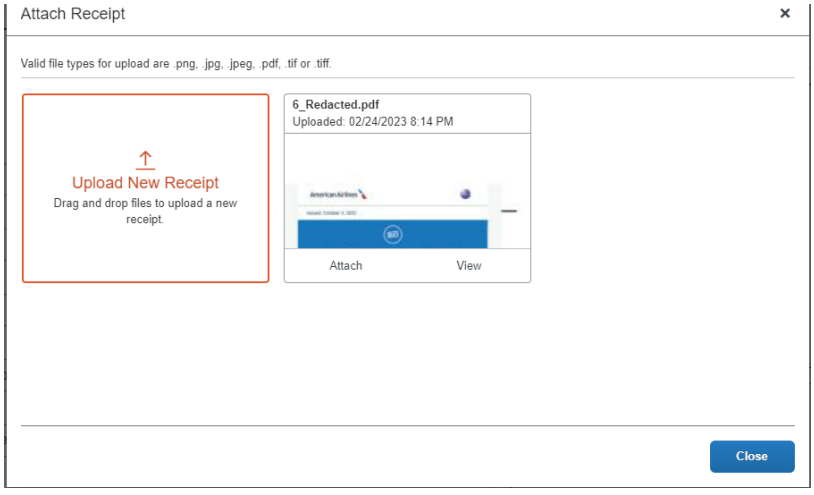
* The traveler must have other expenses in addition to registration to be reimbursed through travel. If there are no expenses, then the department will reimburse on a departmental voucher.

Click Save Expense



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.



Incidental Expenses

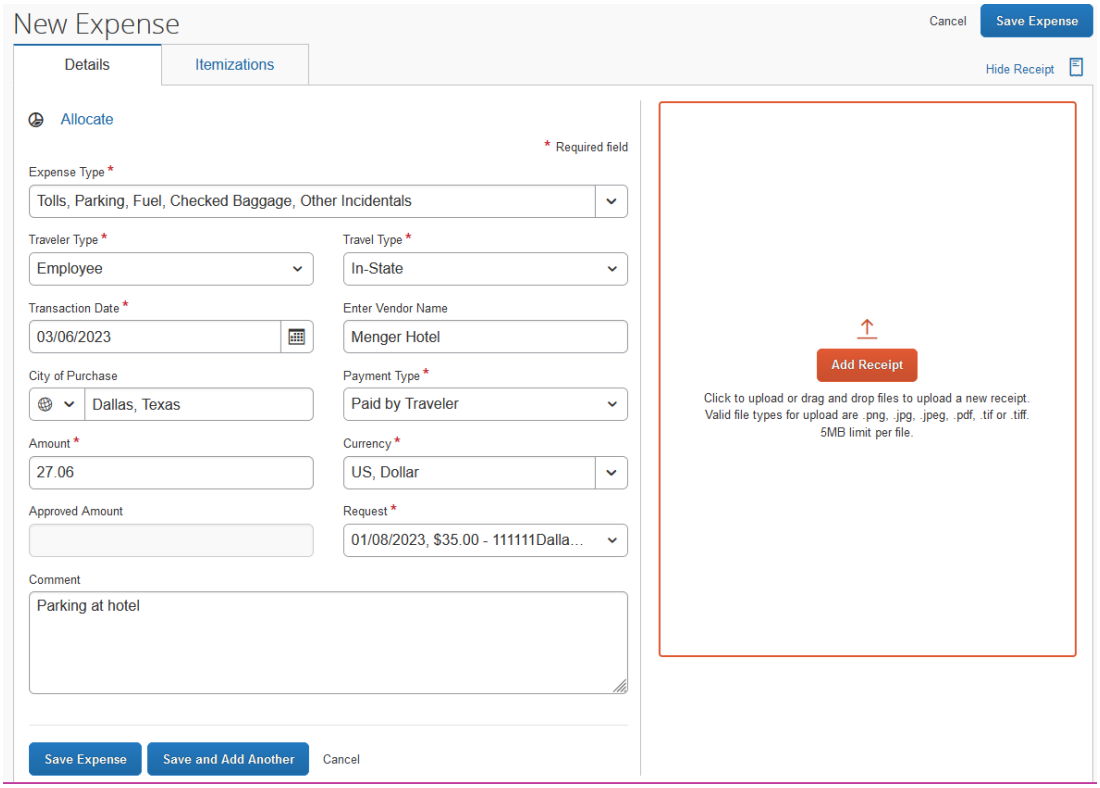
Enter Transaction date, Vendor Name, City of Purchase, Amount and Comment detailing charge.

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

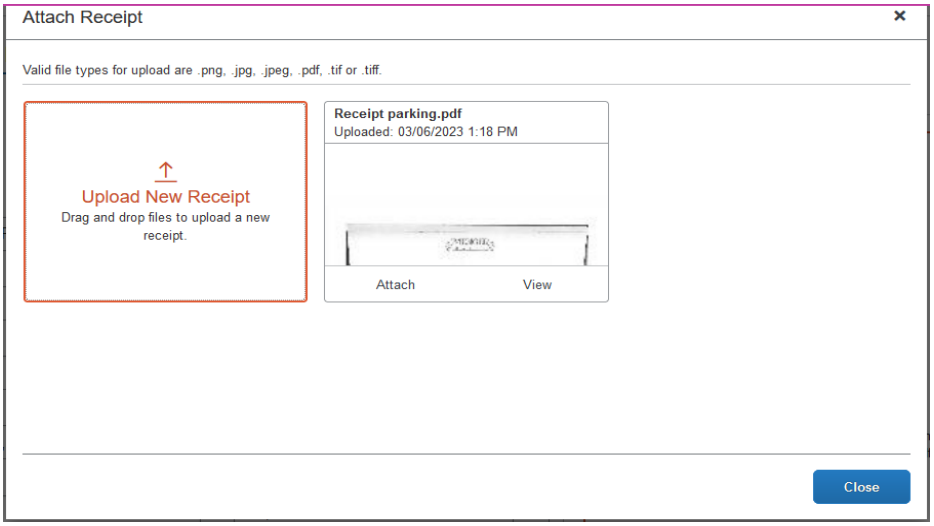
- Fuel for rental car
- Parking fees
- Tolls
- Medical evacuation insurance
- Passport, Visa, Inoculations for foreign travel
- Laundry services for trips longer than 1 week
- Postage for business
- Currency exchange fee
- Tools or supplies necessary to conduct business (i.e.: office supplies, postage)

If you have questions regarding incidental expenses not listed, please email traveloffice@uhcl.edu.

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.

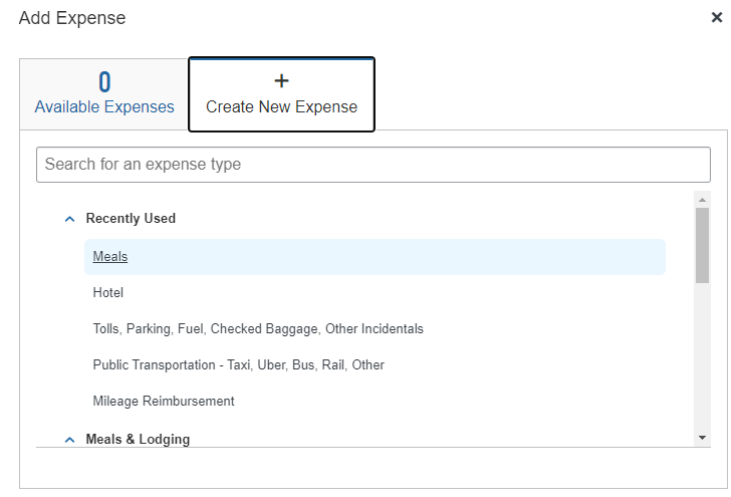


Meal Expense

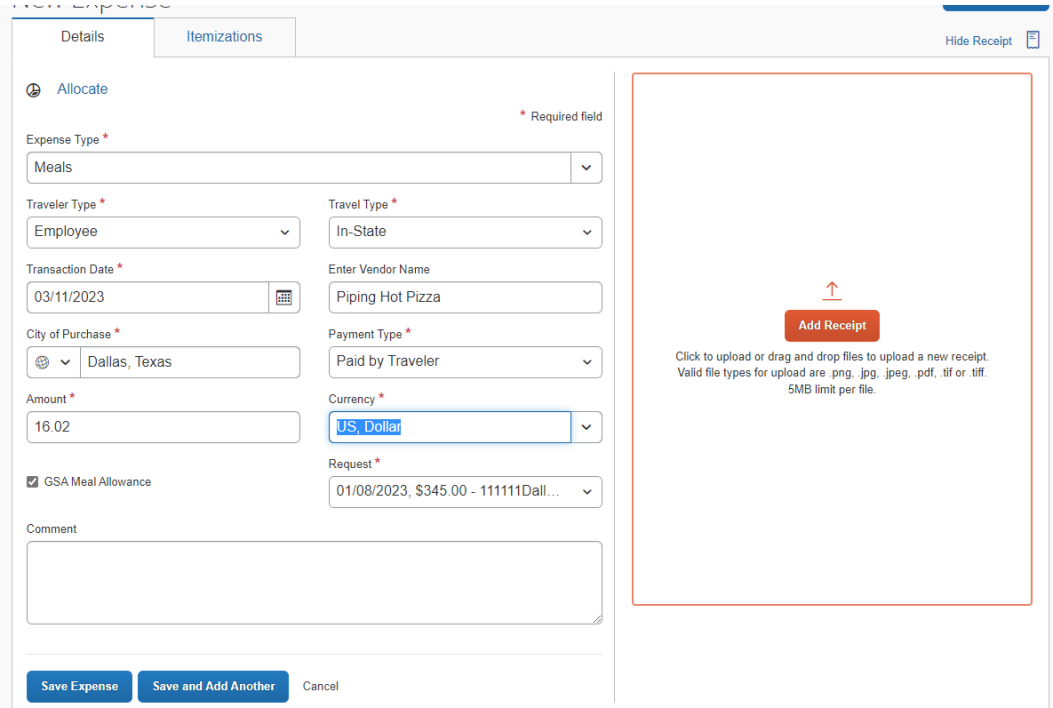
Concur will calculate daily spending and will reimburse actual expenses up to the daily per diem rates. If a traveler exceeds daily per diem, they will not be reimbursed for any overages.

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

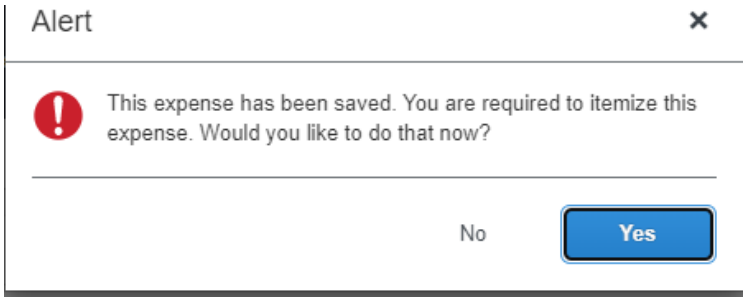
To create a new Meal Expense **Click** Add Expense, **select** Meals



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.



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



Click Yes.

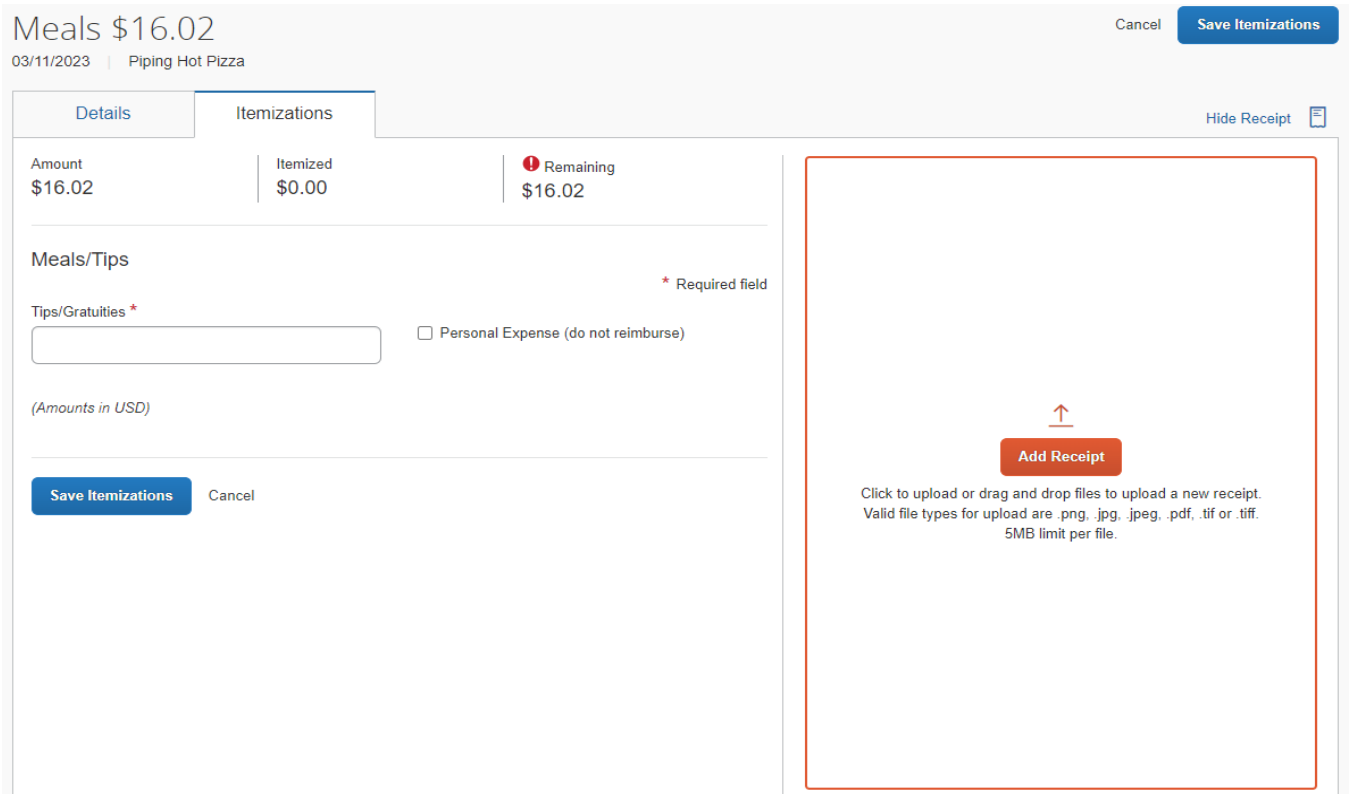
The itemization form below will appear to distinguish meal expense from tip amount.

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.

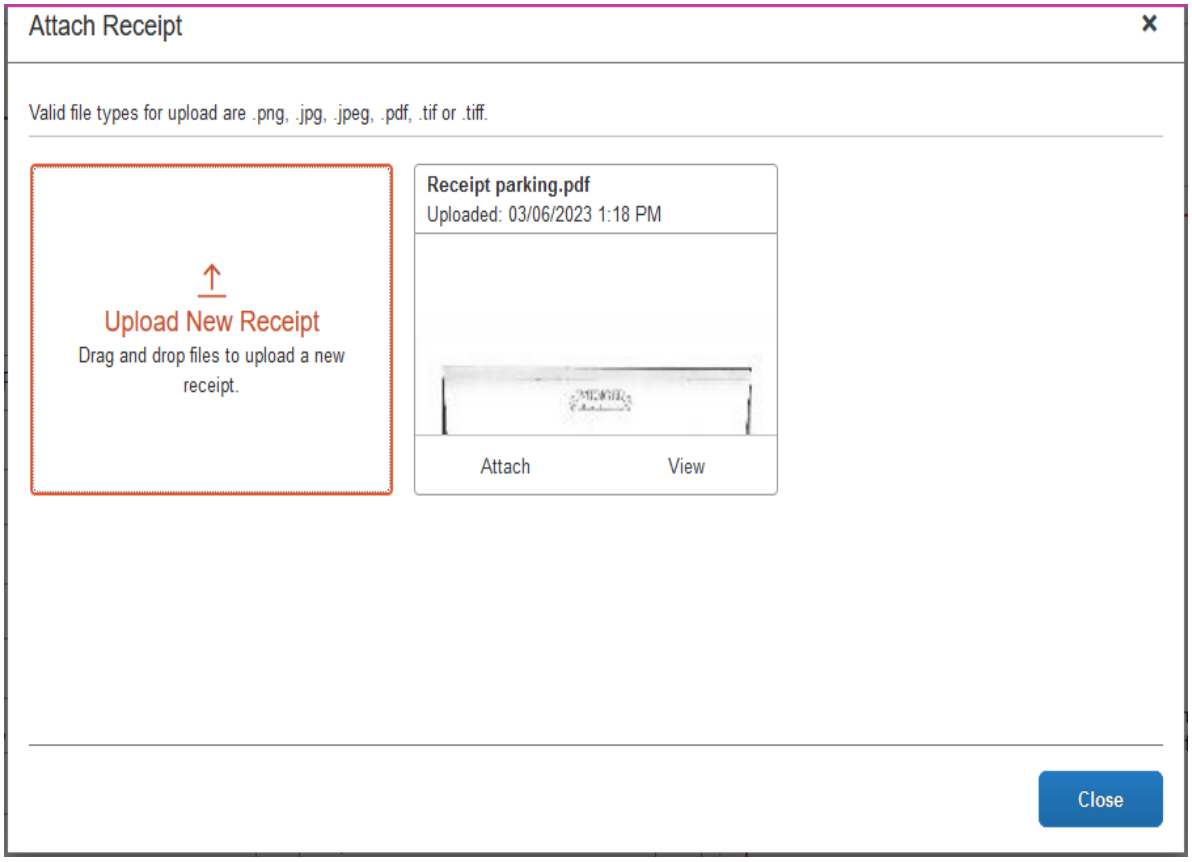
Example: Traveling to Corpus Christi, the traveler has a total allowance of $64 daily. Concur will calculate the total meal purchases for each day and the traveler will be reimbursed for actual expenses up to $64. Any amount over $64 will not be reimbursed.



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.

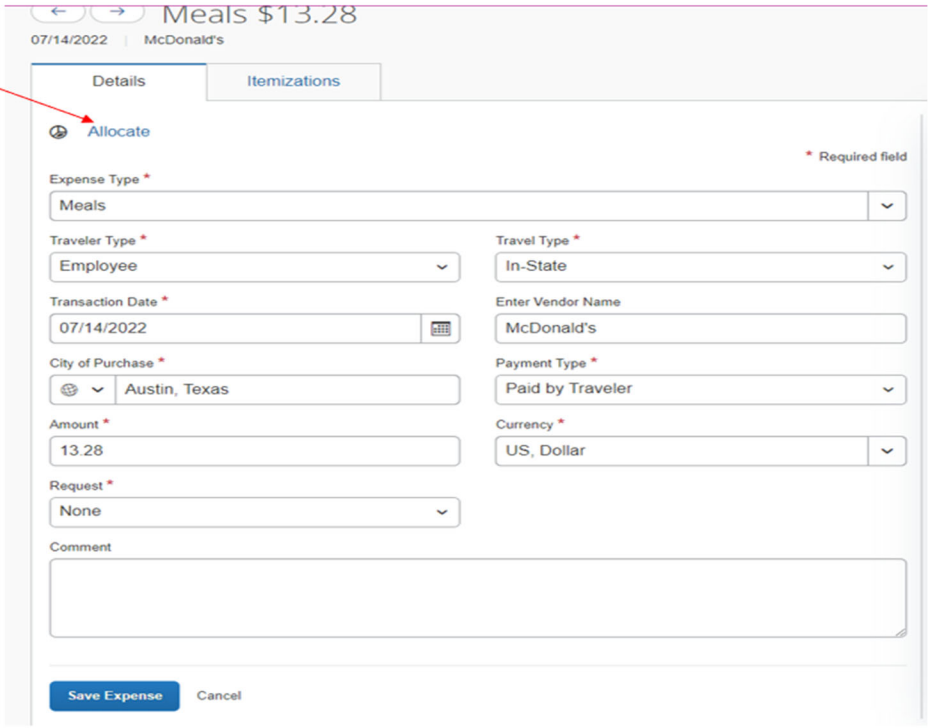


Once all expenses have been entered and all necessary receipts have been uploaded or attached, **Click** Submit Report.

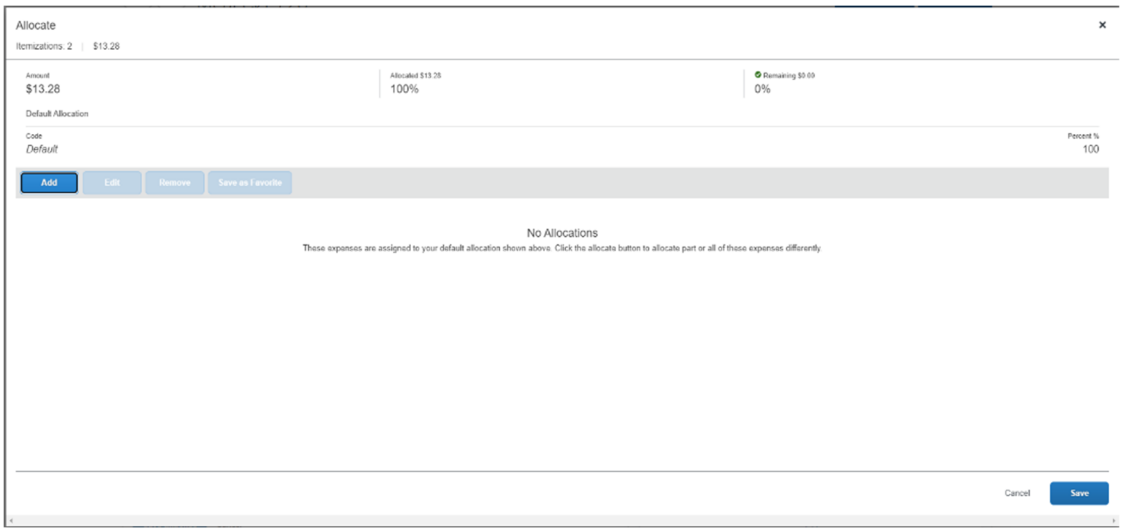
Reallocating Charges

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.

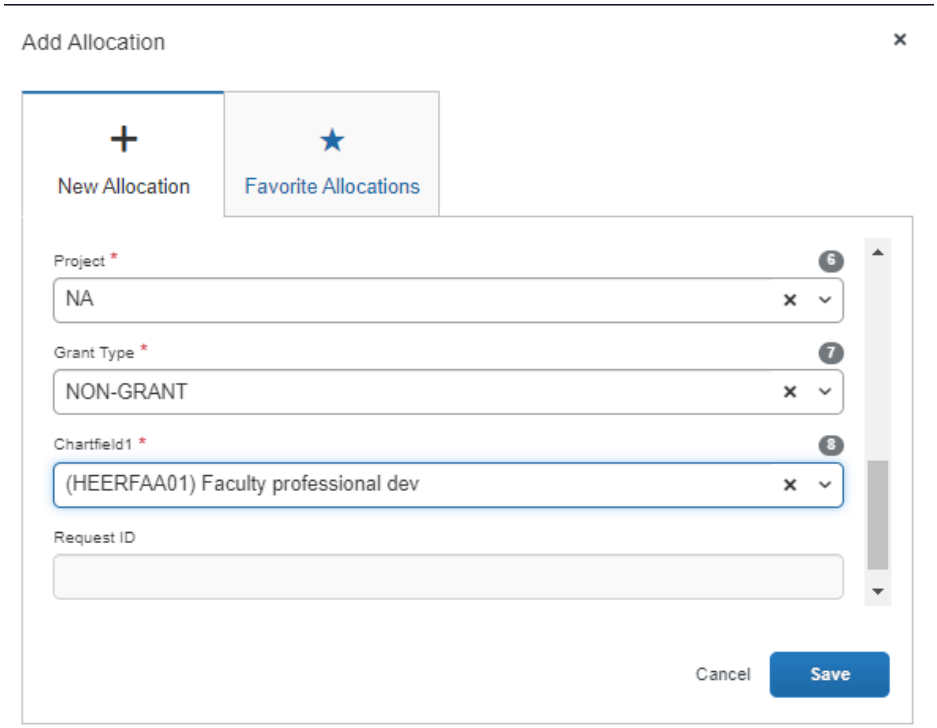
In the expense form, **Click** Allocate



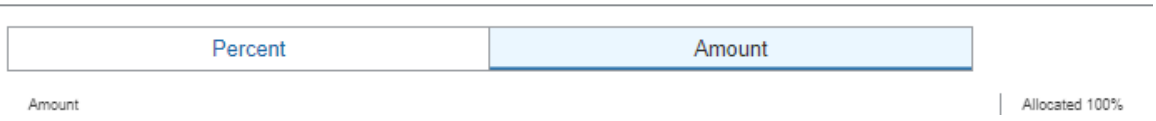
Click Add.



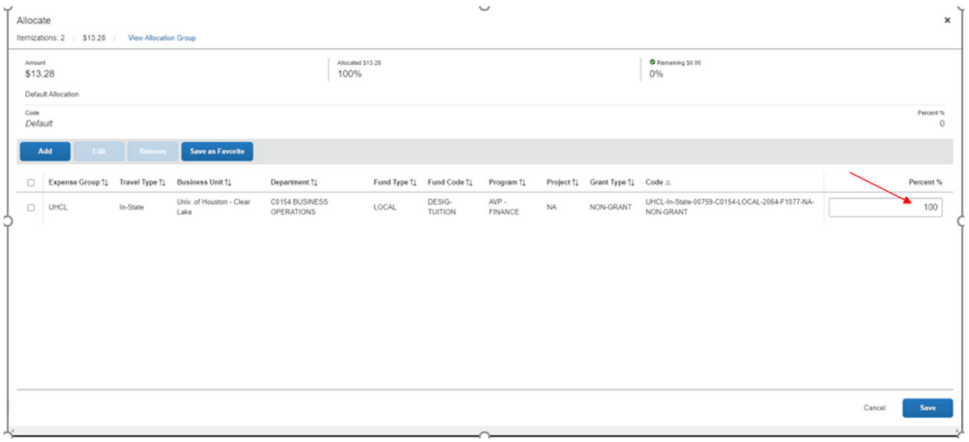
Enter the Cost Center, then **Click** Save.



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



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

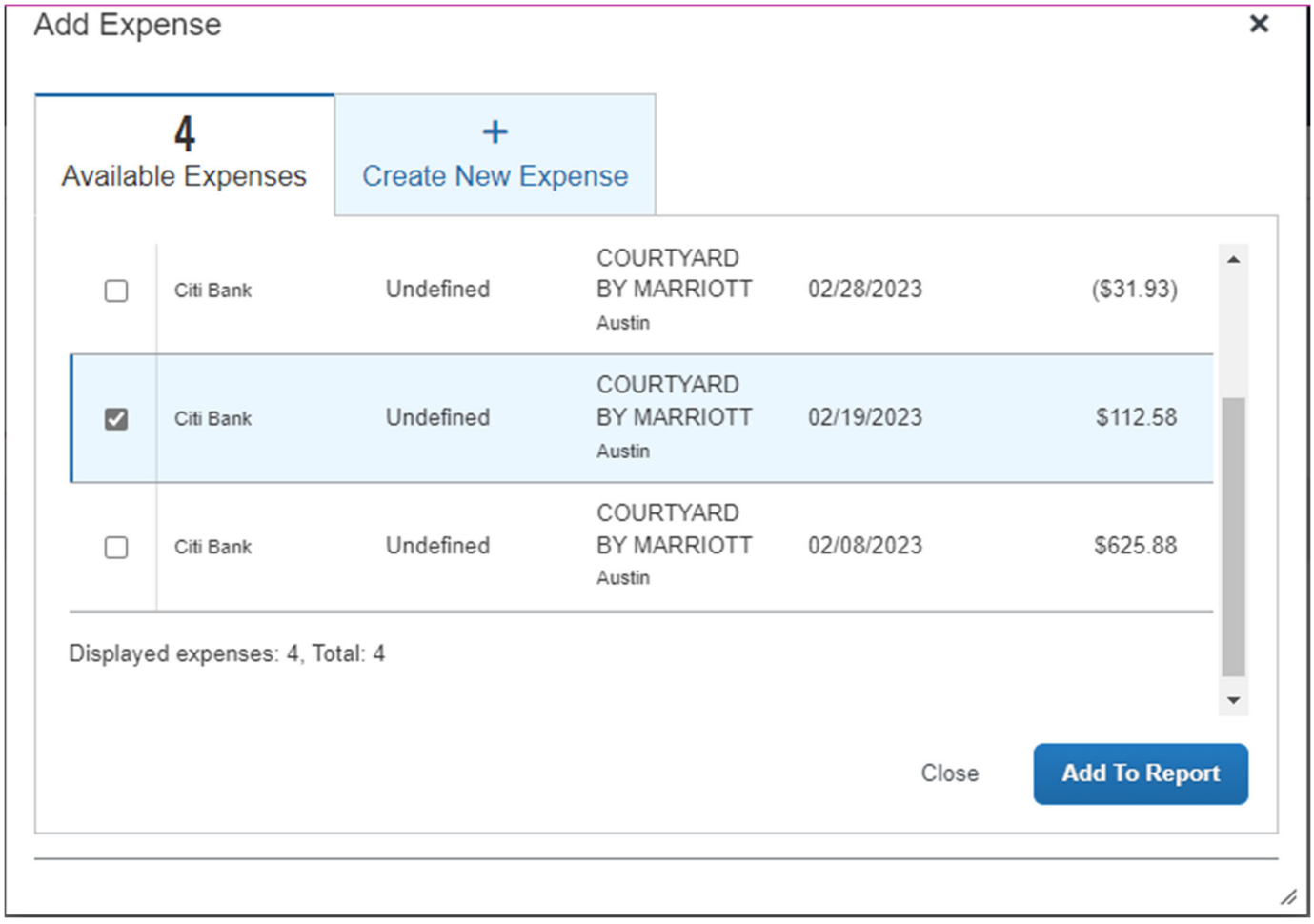


Travel Card Expense

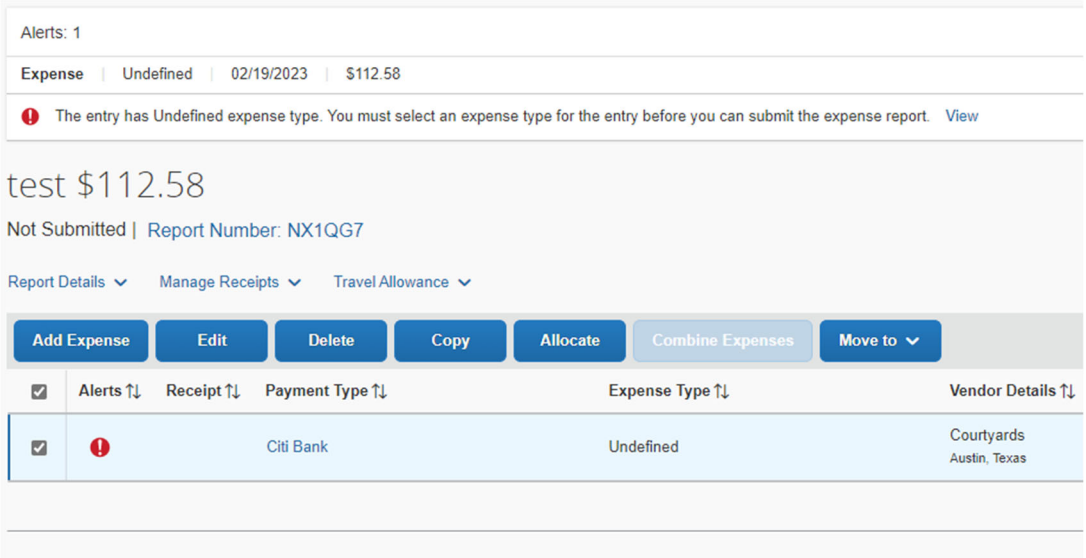
To assign a UHCL Travel Card Expense to a report **Click** Add an expense within the report that has been created. You may also add a personal credit card to your Concur profile and assign specific expenses to it if you prefer to wait for reimbursement.

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



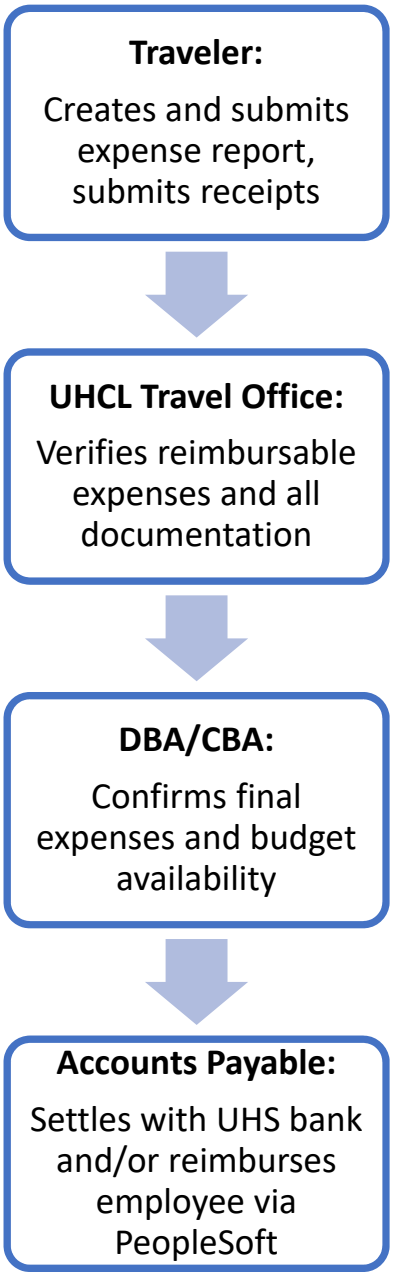
To Edit the expense, **Click** on the check box next to the expense and then **select** Edit.



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.

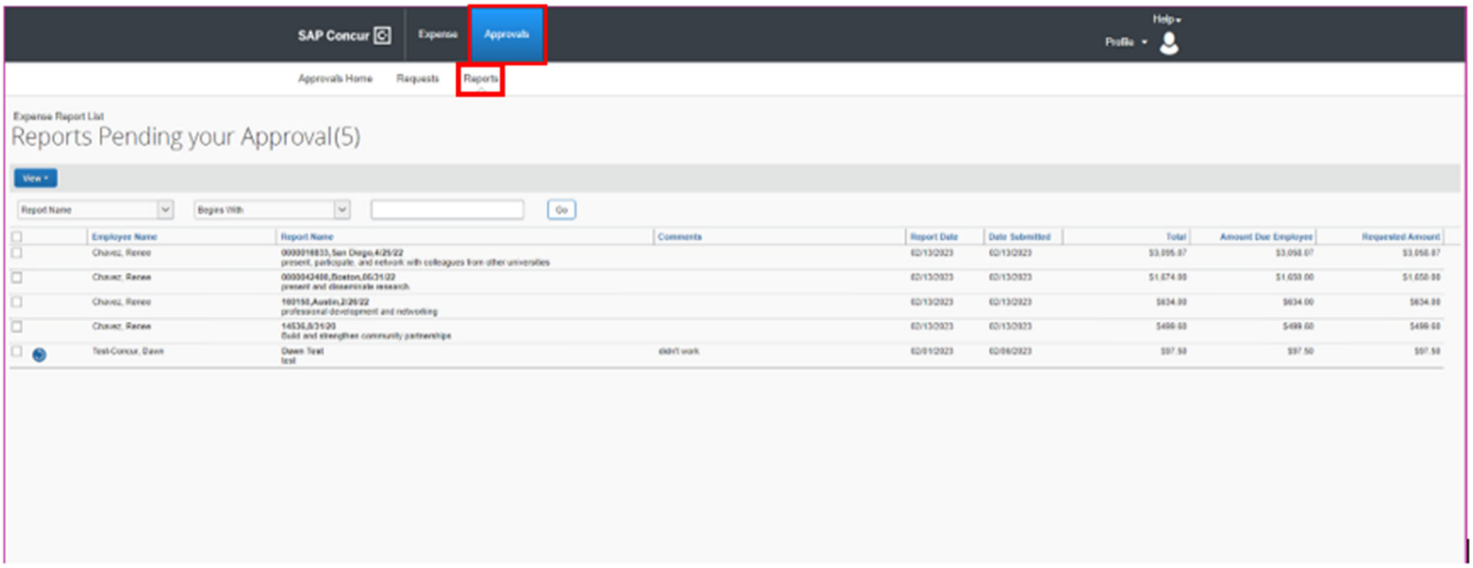
- Any expenses charged to the Travel Card which are non-reimbursable in Concur must be repaid to UHCL within **45 business days**.
- Repayment must be made at the Student Business Services (SBS) window at the Student Services Classroom Building by bringing *(a)* a check or cash, and *(b)* 2 copies of 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.

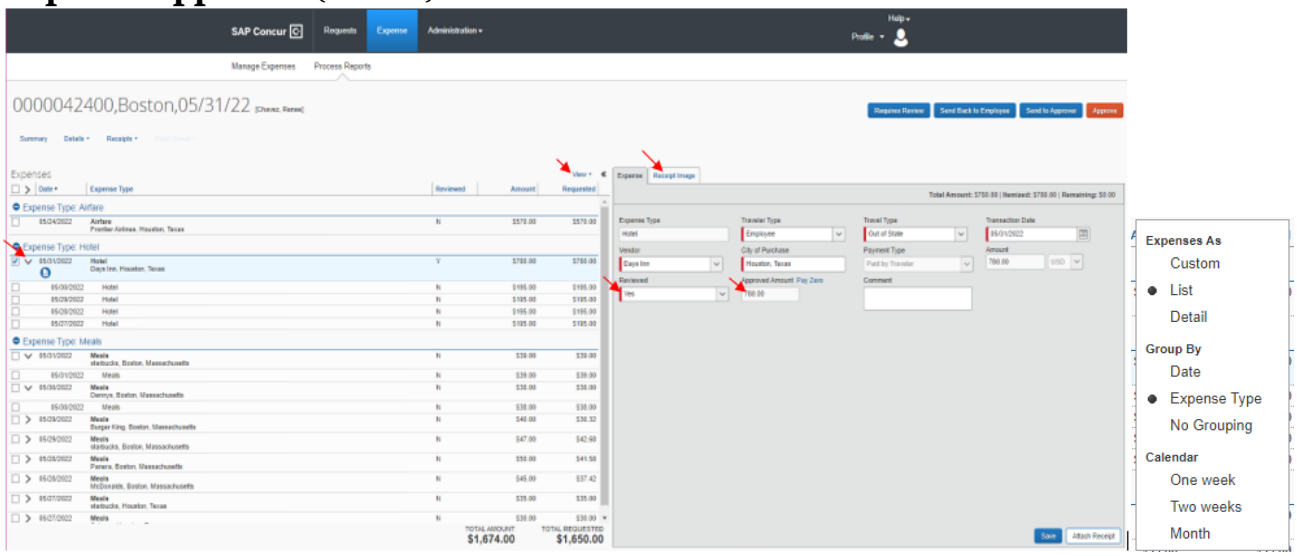


The expense report will open. The view can be changed by **Clicking** View. A drop-down box will appear, and you can arrange the report to see expenses in a list or detailed. They can also be grouped by date or expense type.

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)



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

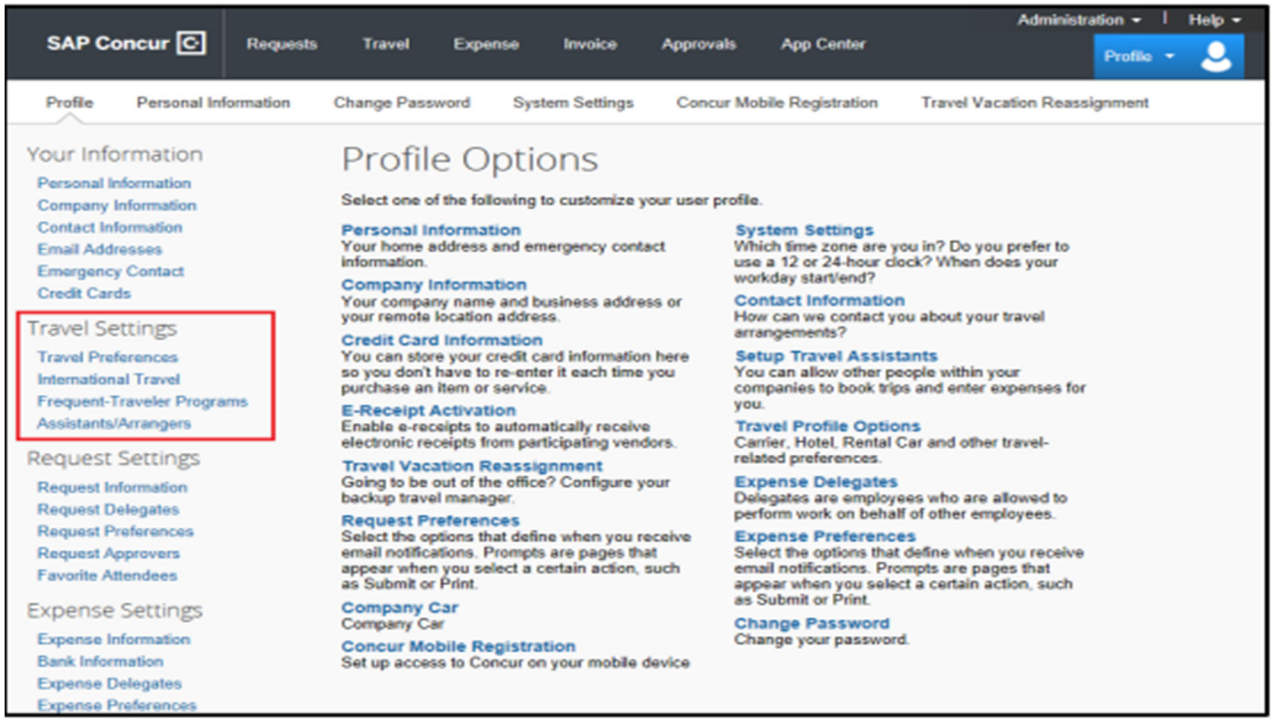
1. If you are a travel arranger and you want to change the profile of one of your users, **Click** Profile.

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.

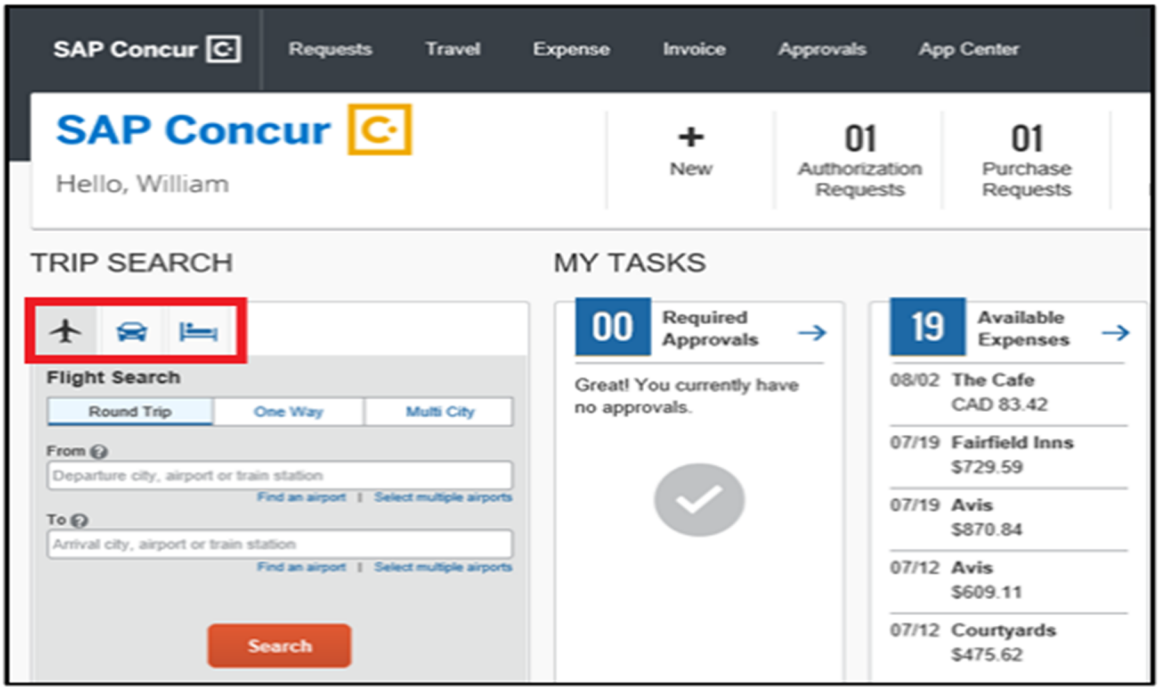
5. On the Profile Options page, select the appropriate Travel Settings links on the left side of the page



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:

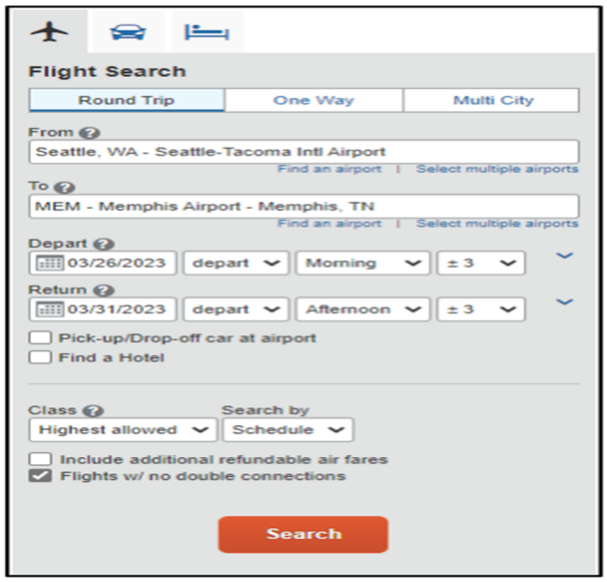
- *The graphical display is based on flight schedule data. It will not show any rail options, and it cannot take refundability or class of service preferences into account.*
- *Each green bar represents 30 minutes of time. Place your mouse pointer over a green bar to see all the flights available for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

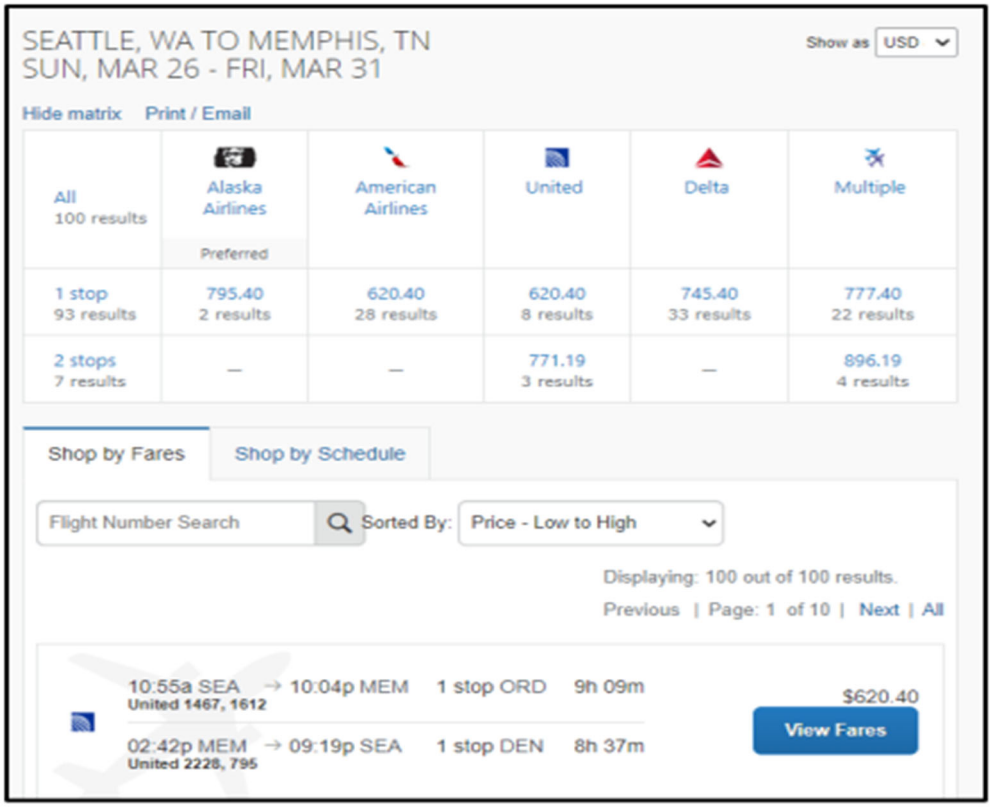
7. Click Search.



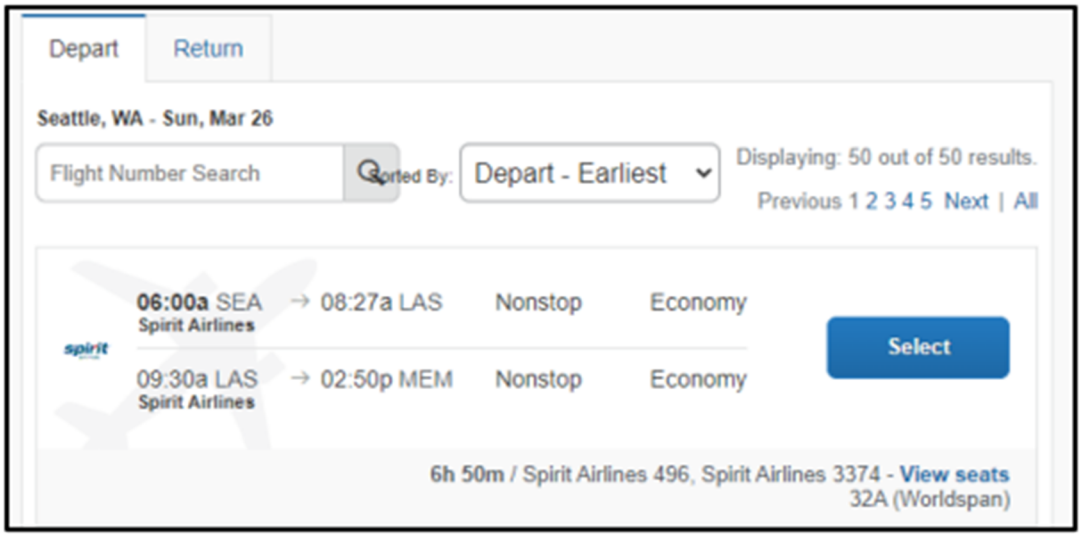
Step 2: Select a flight

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.



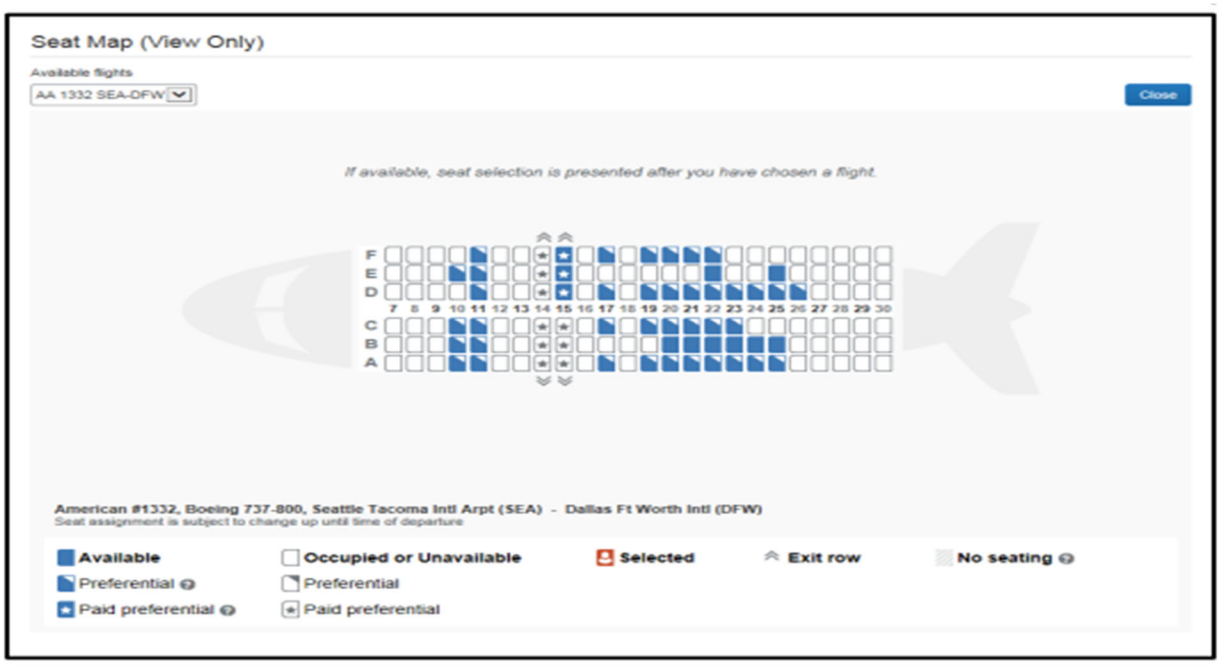
If you **Clicked** Schedule on the previous page, the **Depart** tab is initially active. **Click** the Select button for the flights that you want to purchase from the **Depart** and **Return** tabs.



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.

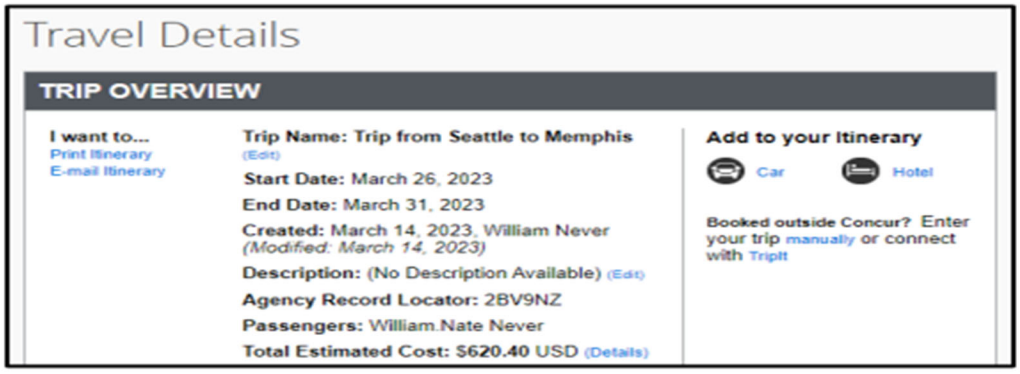
Step 4: Select a hotel

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:

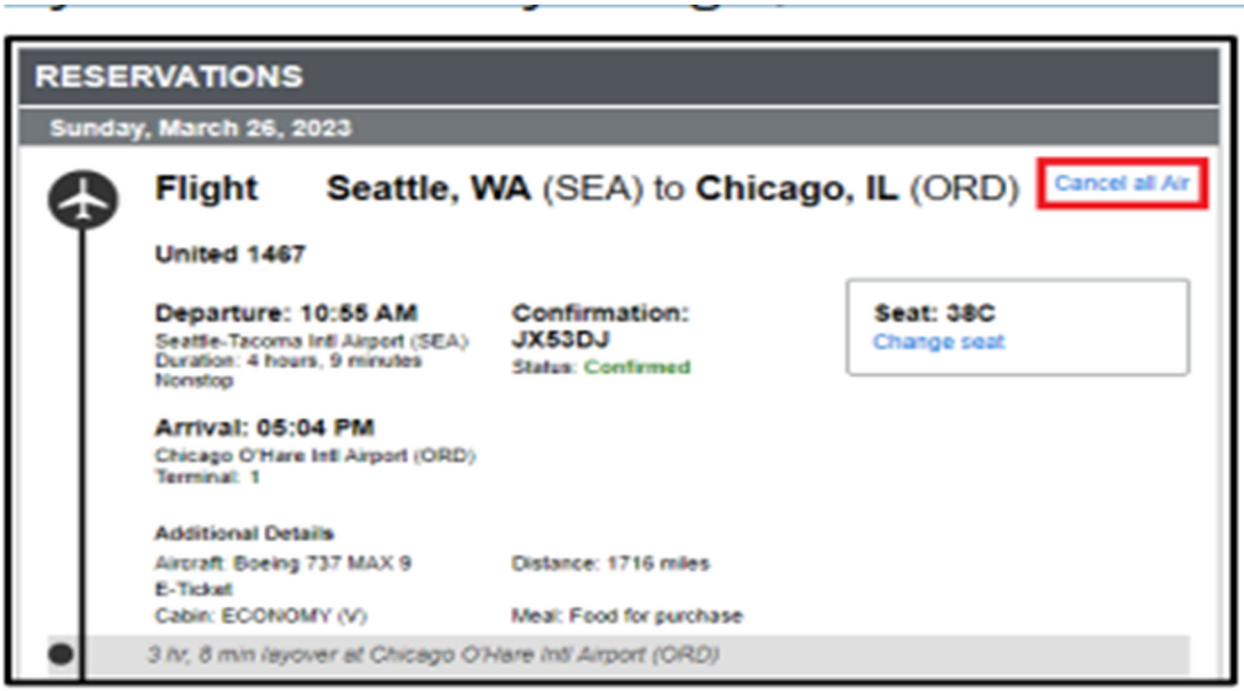
- Review the information for accuracy.
- In the **I want to** section, print, or email your itinerary as appropriate.
- In the **Add to your Itinerary section**, add a car, hotel, Wi-Fi, etc., as needed.



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.*



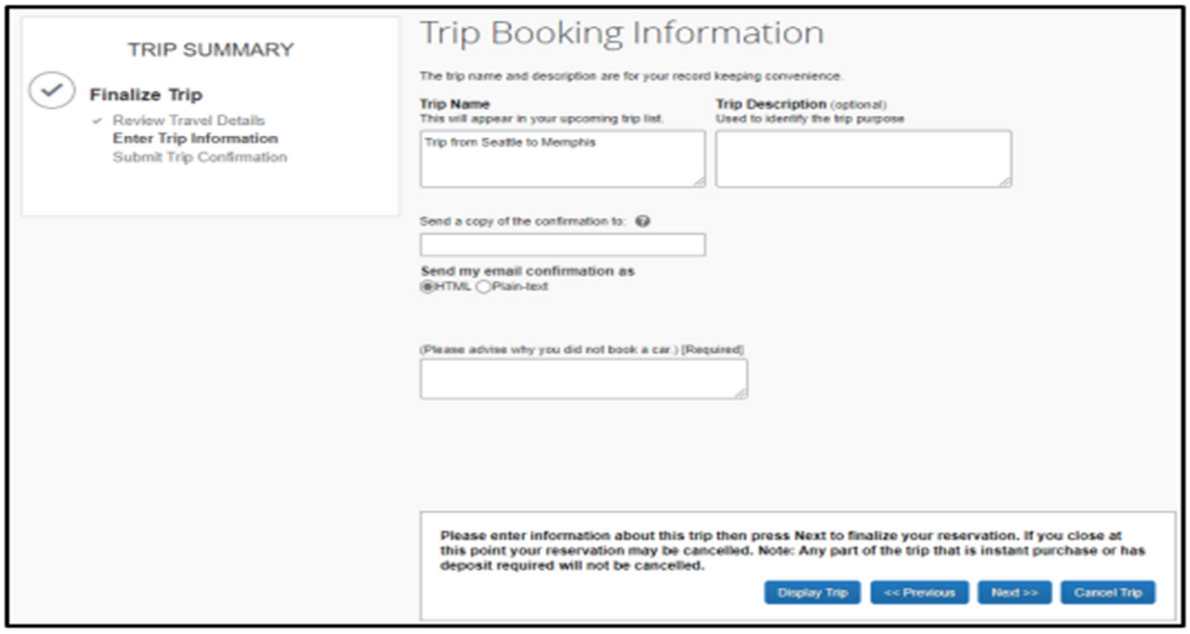
3. Review the remaining sections as necessary and make the appropriate changes.

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.



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).

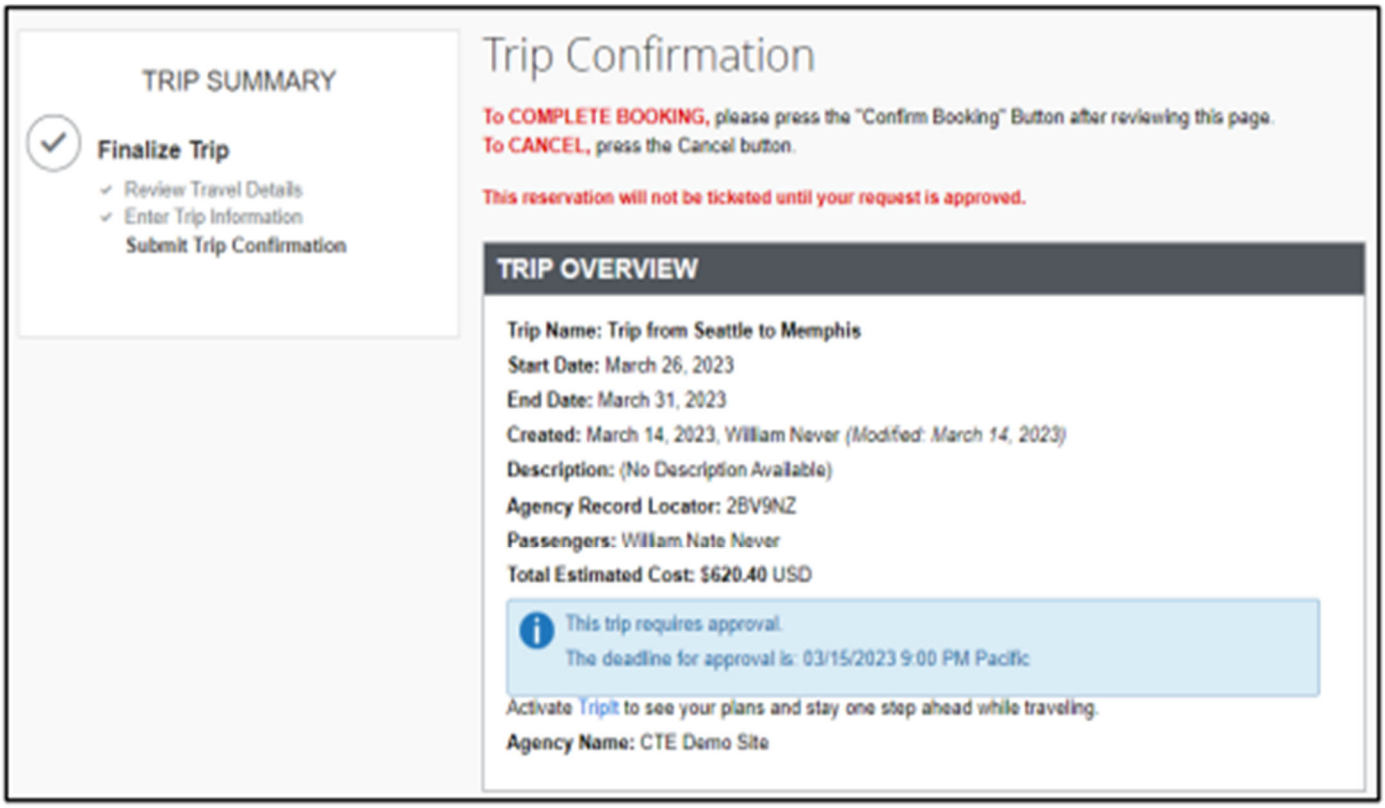
4. Indicate if there is anyone else who should receive the initial confirmation email. Enter as many recipients as needed, separated by commas.

- 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.*



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.

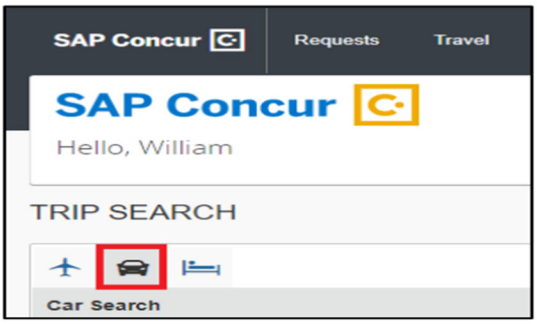
2. Click Finish. The **Finished!** screen shows your confirmation number and information to contact the travel agent.

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.

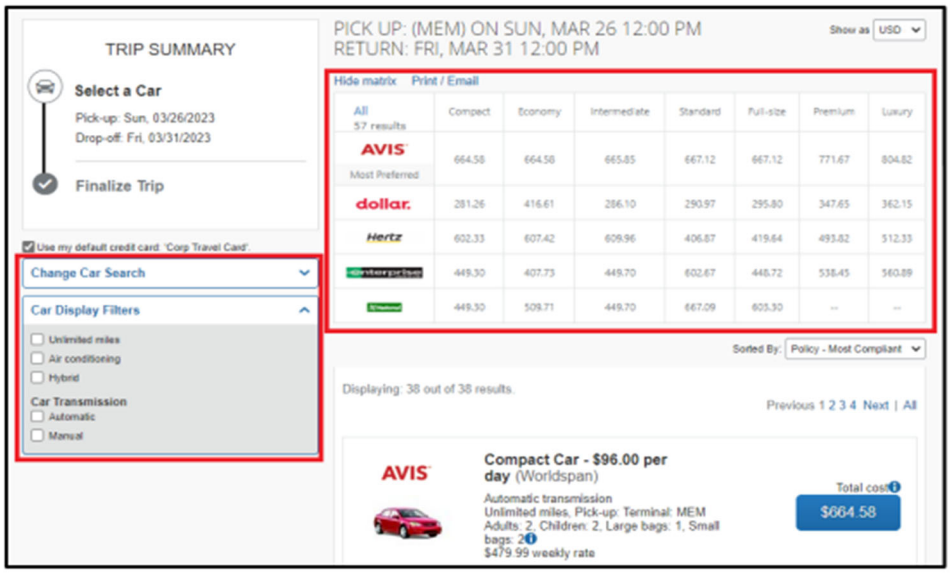
- Select the Car Type.
- Select smoking or non-smoking.
- Select the preferred vendors.

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.



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,

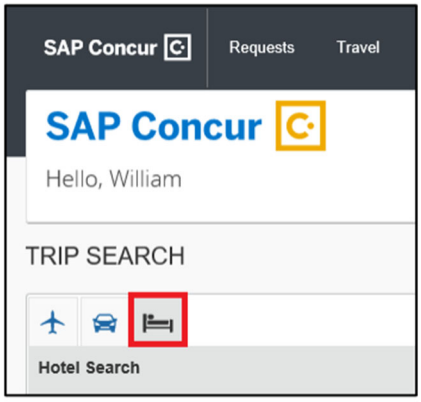
16. On the **Trip Confirmation** page, review your trip details, and then **Click** Confirm Booking. If your trip is not compliant with your company's travel policy, a **Travel Rule Triggered** window appears.

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.

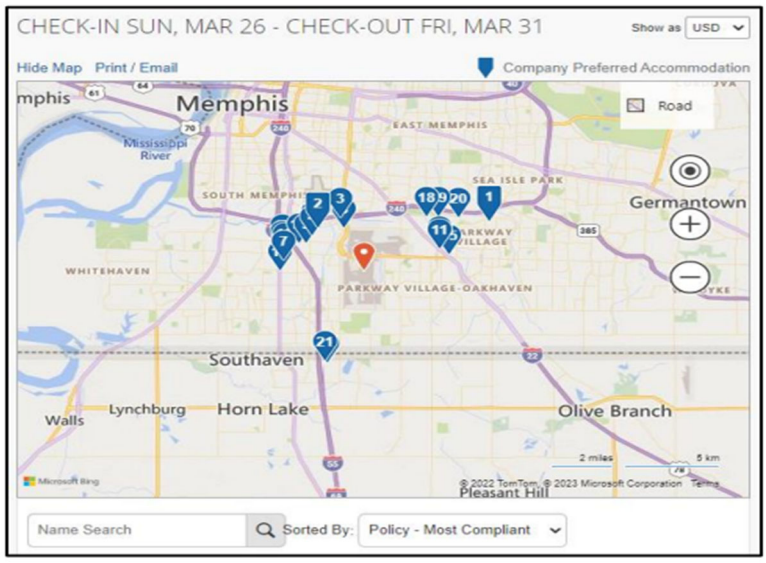
3. In the **Display Settings** area, select the appropriate check boxes.

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

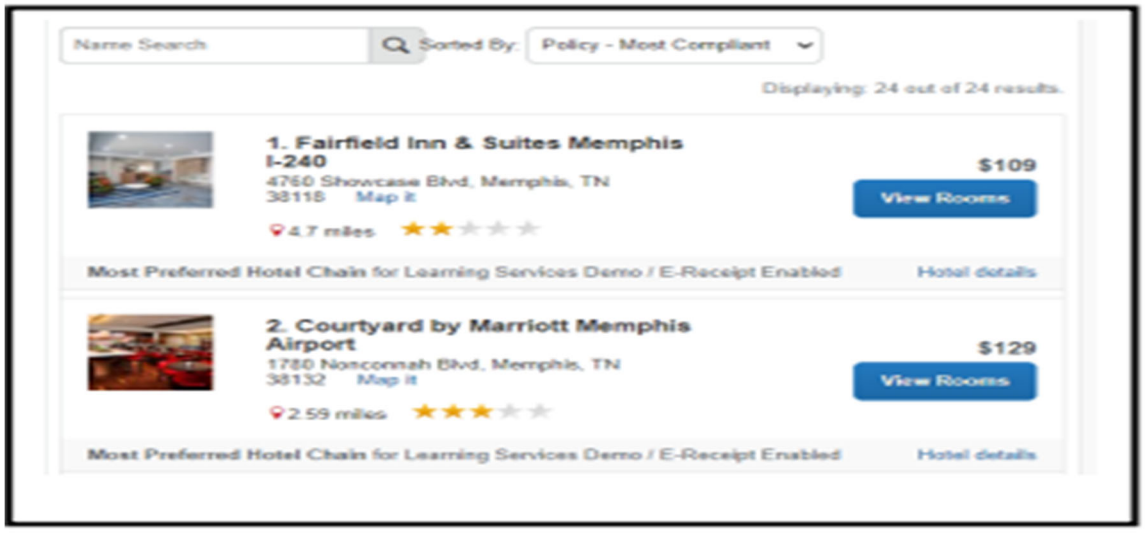
A picture as well as the name, address, rating stars, and price range appears.

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.

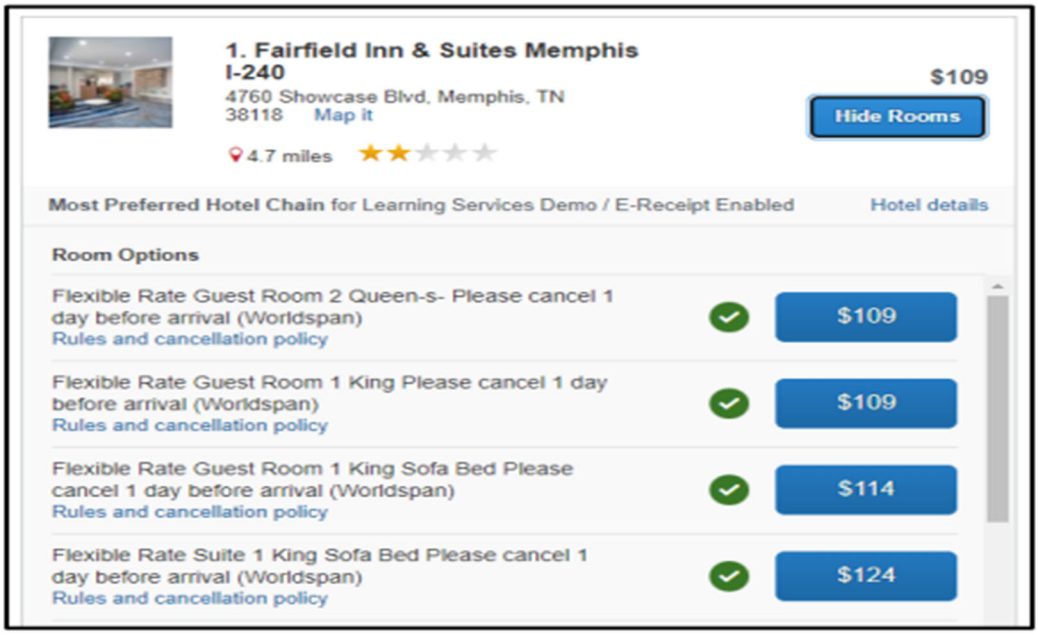
3. Click View Rooms to see:

- 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.



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

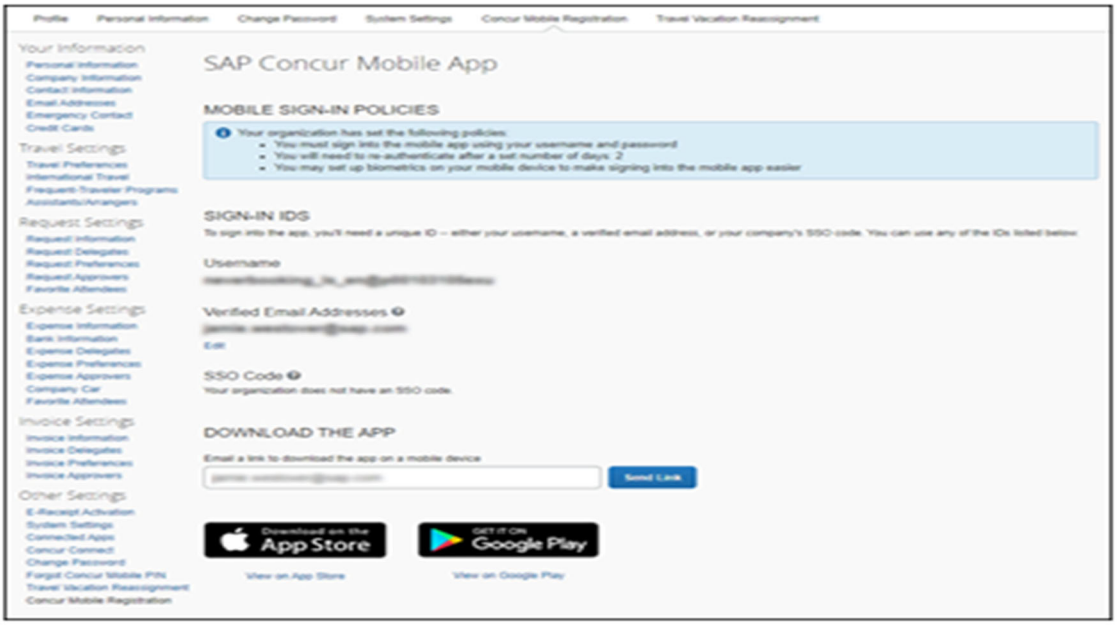
You can use SAP Concur on your mobile device to assist with your Expense, Travel, and Request needs. Because you are using your mobile device, you can access your information in a cab, in a meeting, or at the restaurant.

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).*

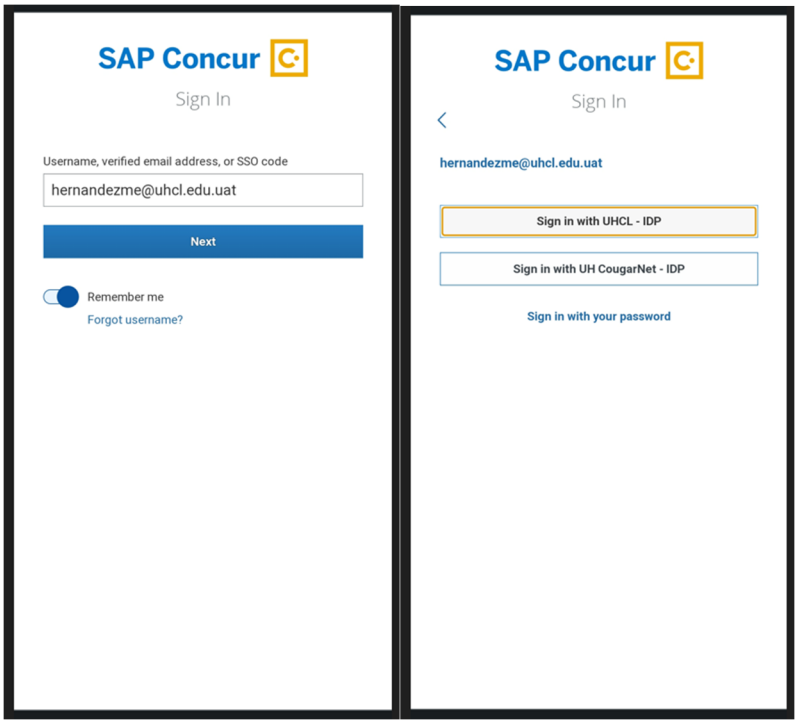
Signing In

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.

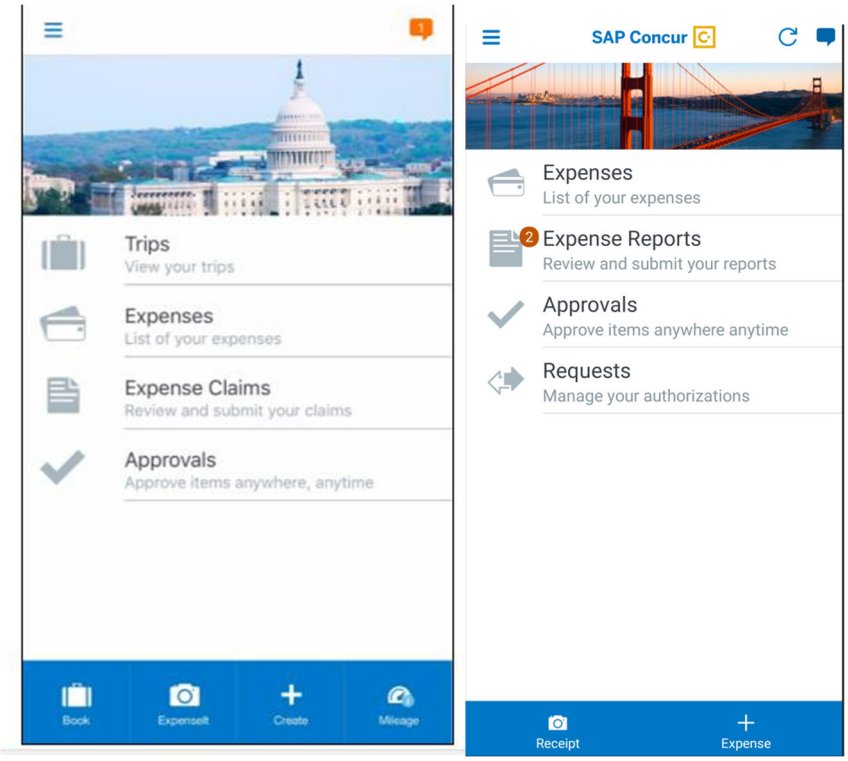
Expense Reports: A view of open expense reports and current statuses. An expense report can be completed from a mobile device.

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.*

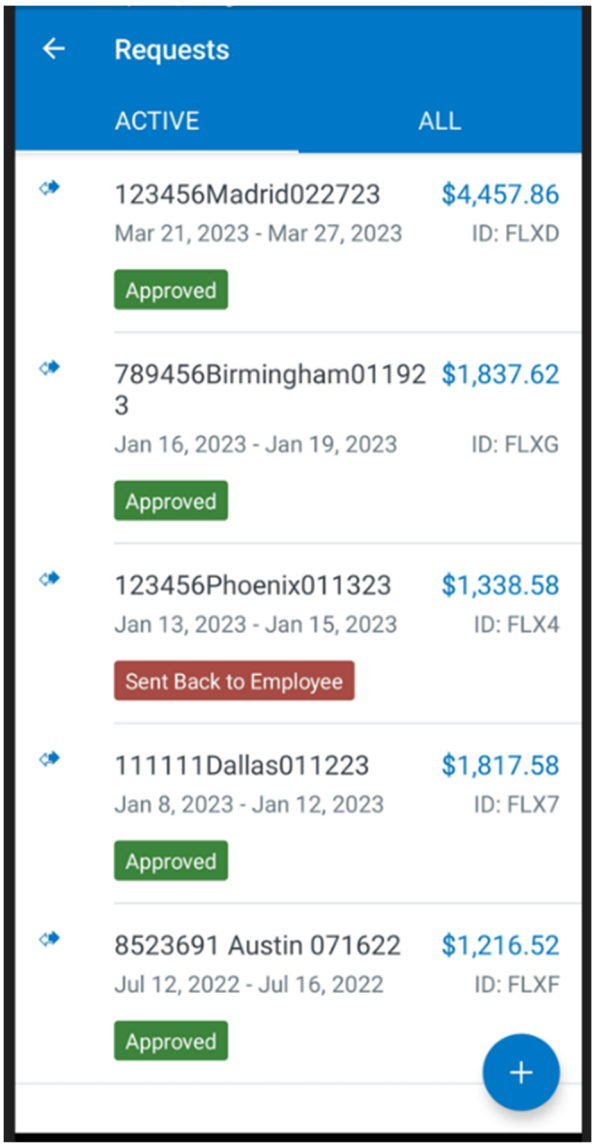


Request

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.

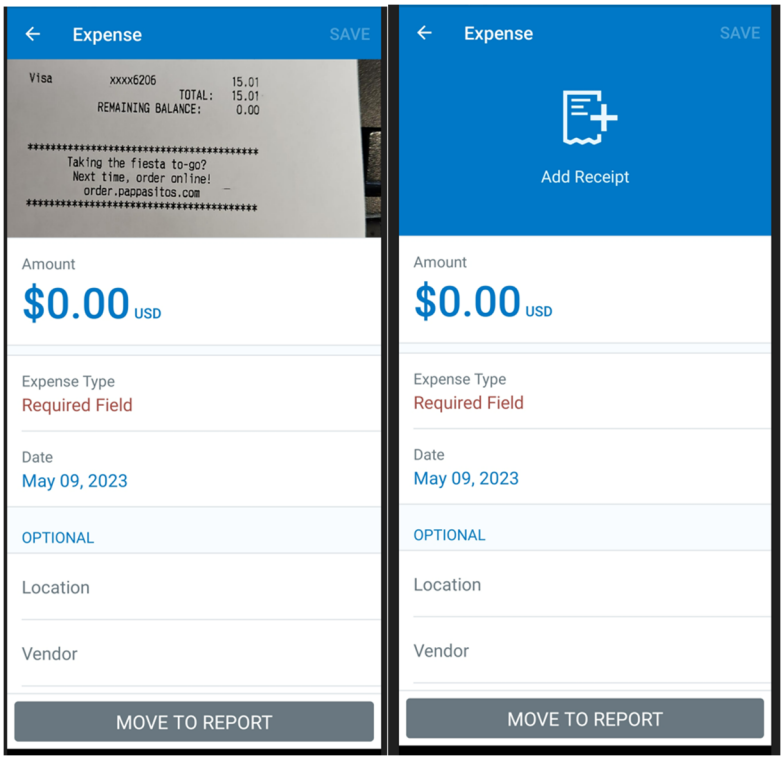
Tips for receipts:

- 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.



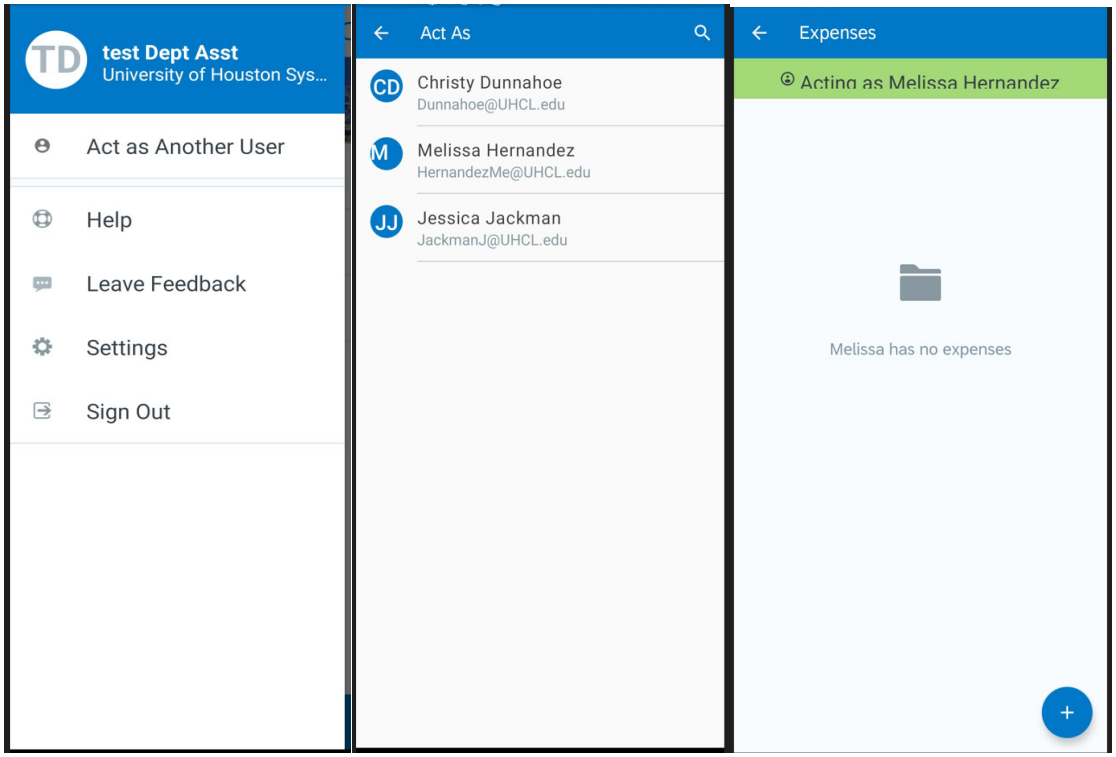
Note: *For an expense to be saved to a report, an expense report must already have been created.*

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

Technical Issues

Travel Office Phone: 281-283-2270 Email: 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….