

University of Houston  Clear Lake

UHCL CONCUR

INSTRUCTIONS

Business Operations – Version 1

June 2023

TABLE OF CONTENTS

		PAGE
A. Getting Started	<u>Travel Office Contacts</u>	5
	<u>Design Overview</u>	6
	* Request	
	* Expenses	
	* Travel booking	
	* Flowchart	
	<u>Icons</u>	9
	<u>Getting Started Checklist</u>	11
B. Signing In ... and Getting Moving!	<u>General Information</u>	12
	<u>Sign In Page</u>	13
	<u>Home Page</u>	15
	<u>Using Delegates</u>	16
	<u>Requesting Travel</u>	22
	* Expected Expenses	
	* Request Appr	
* Flowchart		

B. (cont) **Expense Reporting / Itinerary** **31**

- * Airfare
- * Hotel/Lodging
- * Mileage
- * Public Transportation
- * Registration
- * Incidentals
- * Meals
- * Reallocating Charges
- * Travel Card Expense
- * Expense Approval
Flowchart

Travel Booking Online **60**

- * Profile Update
- * Traveler Arranger/Delegate
- * Flights
- * Car
- * Hotel
- * Other/Misc.

Using Concur Mobile **78**

C. Getting Support **Trip Planning** **85**

In Each Phase

- * Mid-Trip**
- * After Return**
- * Technical Issues**

D. Timing Matters!

Expense Report Due

86

- * 7-10 days**

Checking Status

- * Online 24/7**

Personal Days Rules

- * If $\leq 50\%$ of days**
- * If $> 50\%$**
- * If During Foreign Trip**

Repaying UHCL

- * Within 45 days**

E. FAQs

Sundry Factoids & Links

87

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

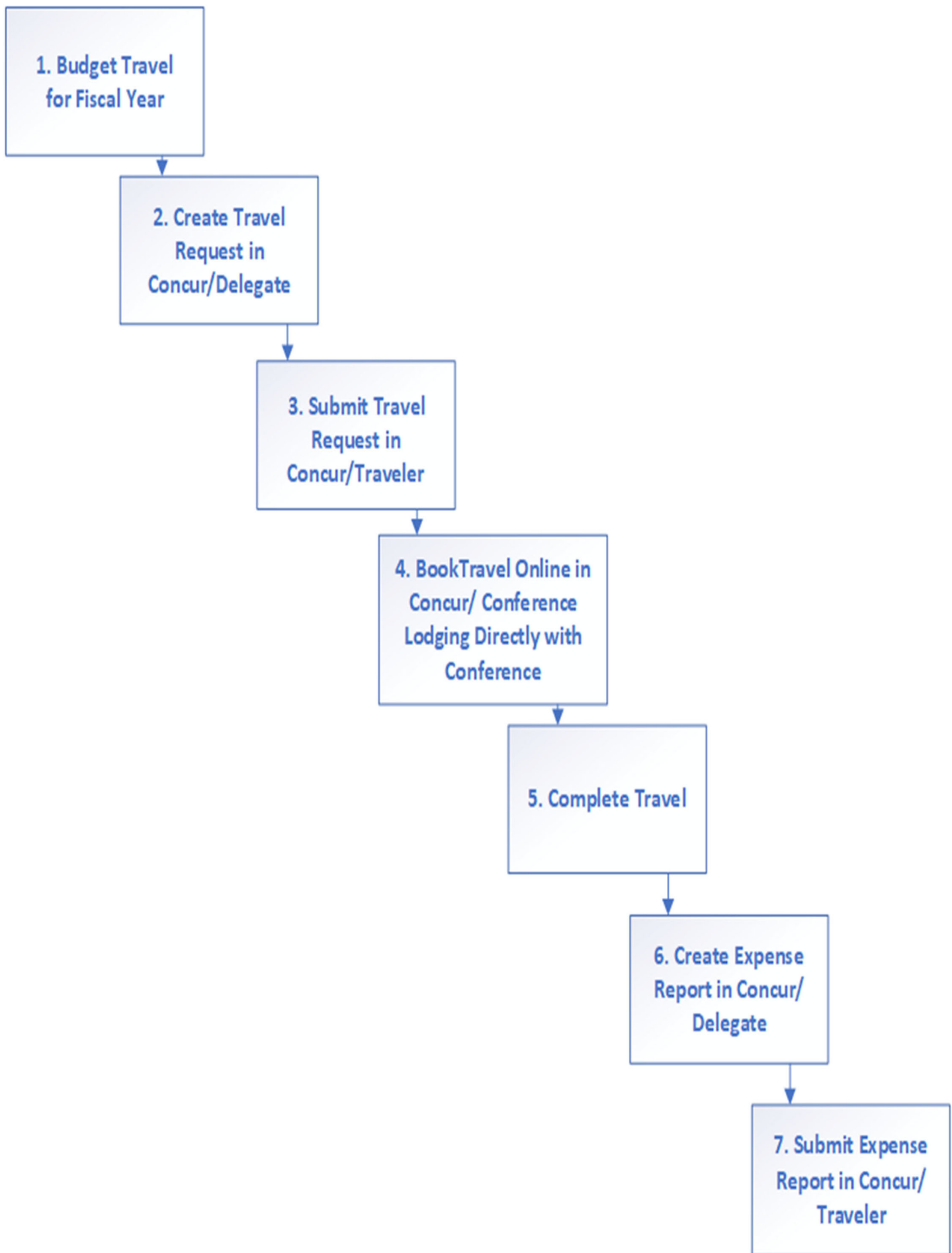
- ✓ The **Request** module enables you to seek approval for the trip and associated estimated expenses before you travel.

- ✓ 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.





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

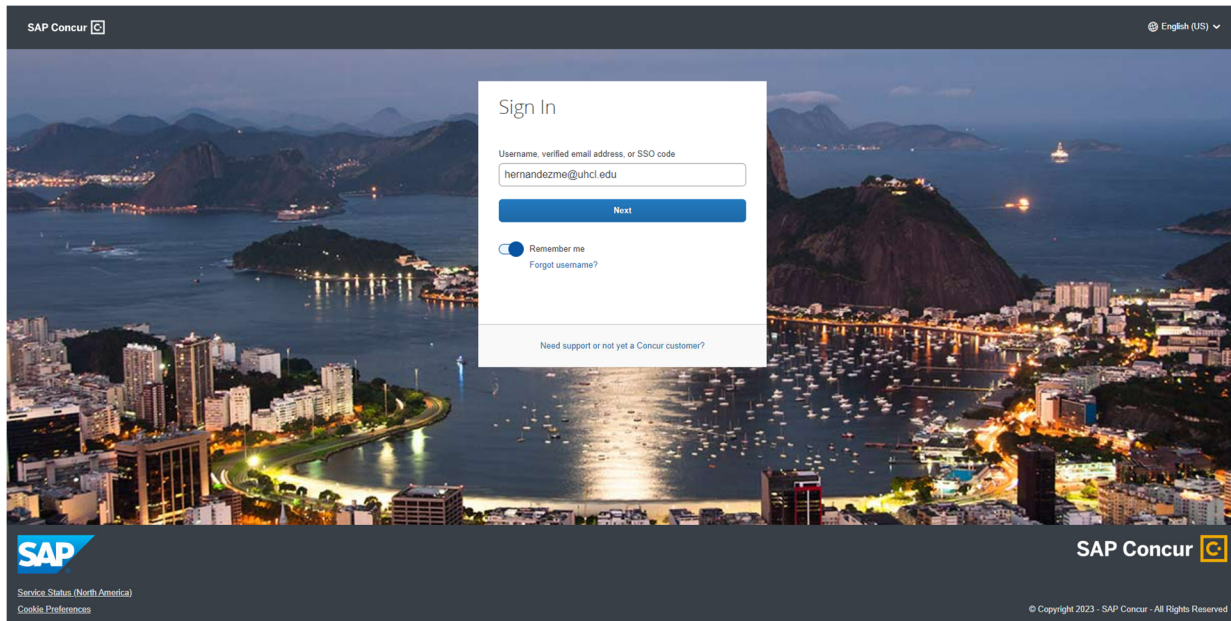
- Name, ID, basic contact information
- Add any desired information (phone numbers, alternate email, etc.)
- Activate e-receipts

□ 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

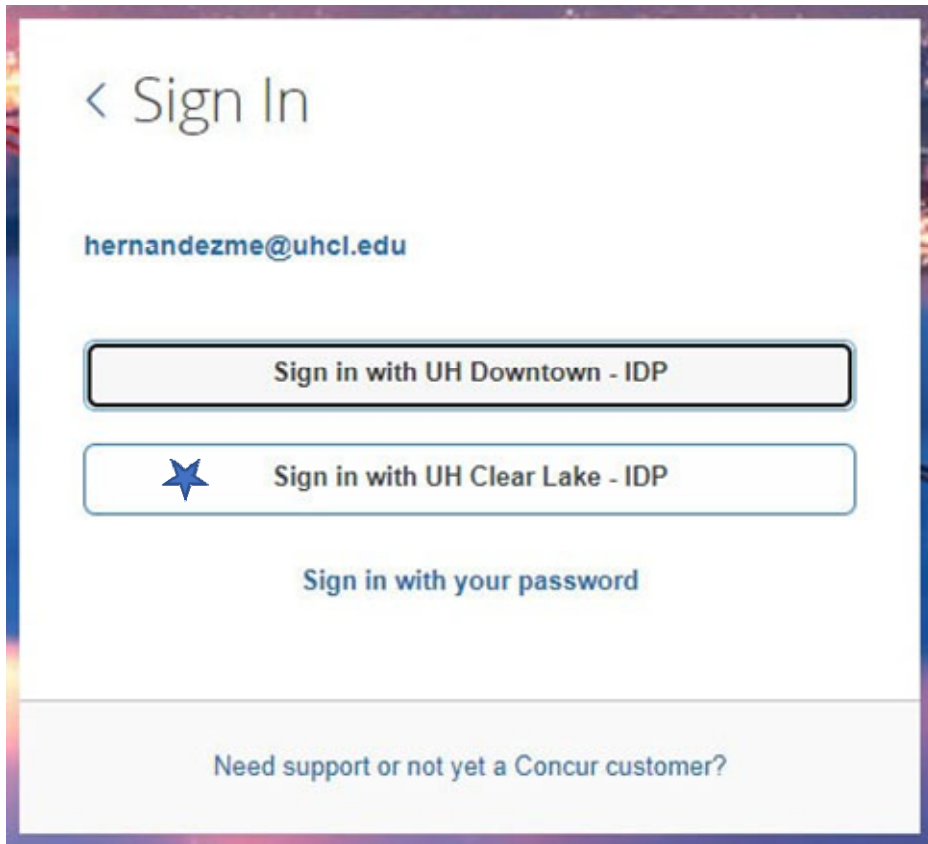
B. Signing In ... and Getting Moving!

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!

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

ALERTS

- As an employee of University of Houston System, you are eligible for a free Triplt 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

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

MY TRIPS (0)

You currently have no upcoming trips.

Home Page

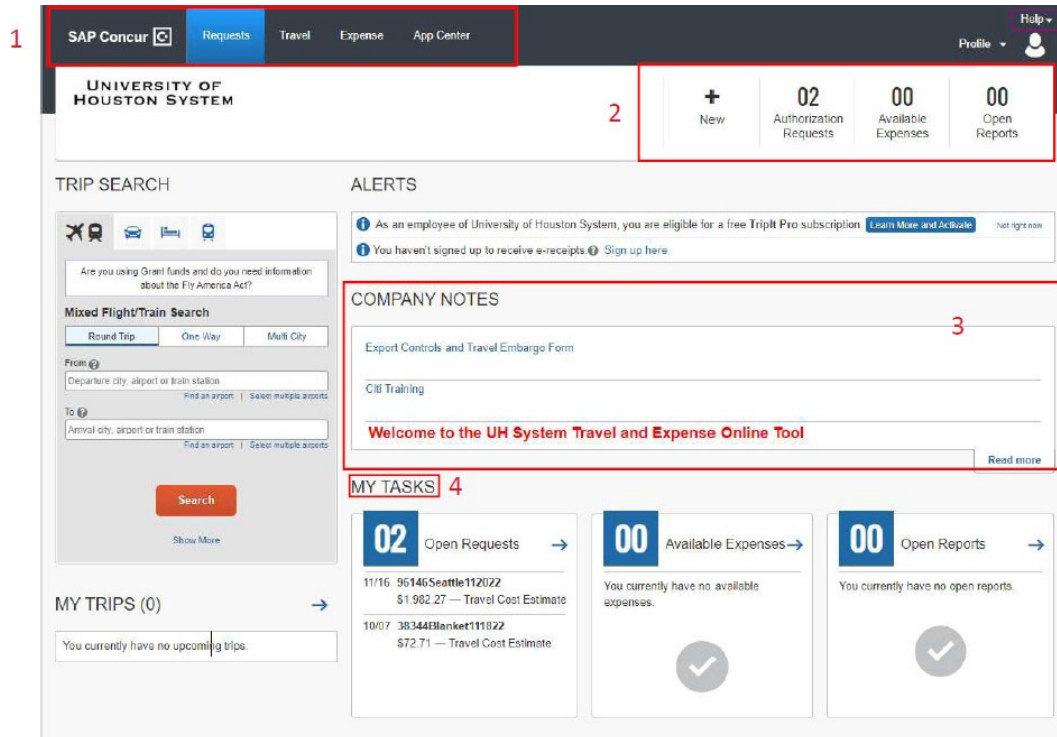
The appearance of a traveler's home page will vary based on the permissions of each traveler.

- 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.

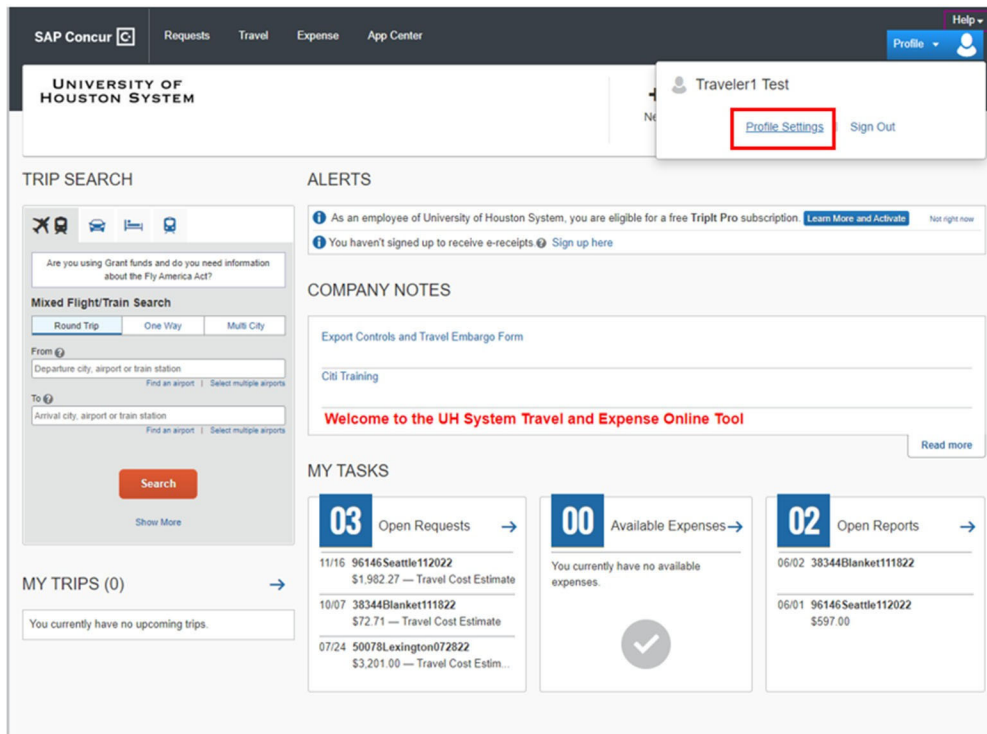


Using Delegates

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

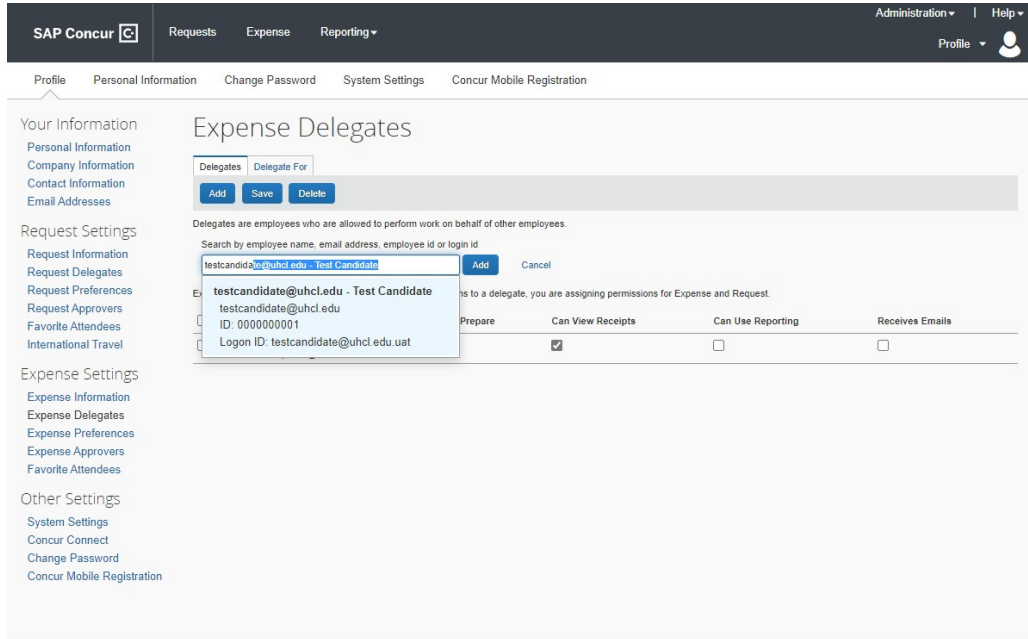
Select Profile and then Profile Settings



Click Expense or Request Delegates.

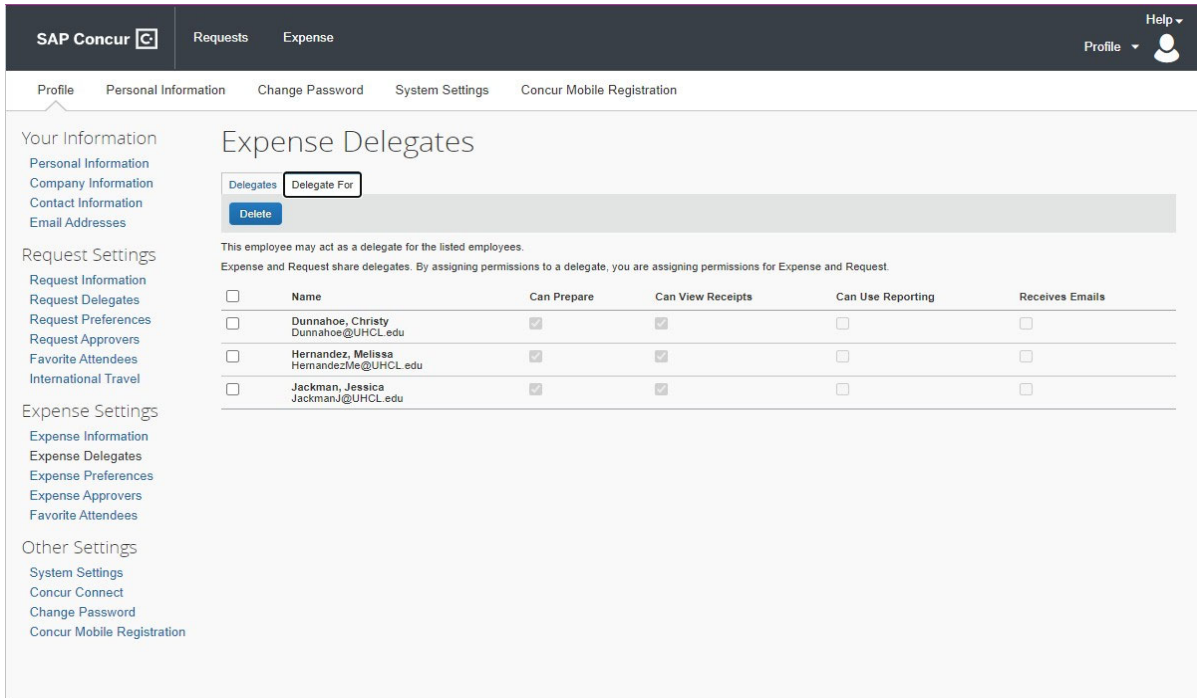
The screenshot shows the SAP Concur user interface. At the top, there is a navigation bar with 'SAP Concur' logo, 'Requests', 'Travel', 'Expense', and 'App Center' tabs. On the right of the navigation bar, there is a 'Profile' dropdown menu and a 'Help' button. Below the navigation bar, there is a sub-navigation bar with 'Profile', 'Personal Information', 'Change Password', 'System Settings', and 'Concur Mobile Registration' options. 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 'Request Delegates' link is located under 'Request Settings', and the 'Expense Delegates' link is located under 'Expense Settings'. The 'Request Delegates' link is located at approximately [415, 155, 425, 235] and the 'Expense Delegates' link is located at approximately [475, 155, 485, 235].

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', 'Expense', 'Profile', and 'Help'. Below this, a secondary navigation bar lists 'Profile', 'Personal Information', 'Change Password', 'System Settings', and 'Concur Mobile Registration'. The left sidebar contains a menu with categories: 'Your Information' (Personal Information, Company Information, Contact Information, Email Addresses), 'Request Settings' (Request Information, Request Delegates, Request Preferences, Request Approvers, Favorite Attendees, International Travel), 'Expense Settings' (Expense Information, Expense Delegates, Expense Preferences, Expense Approvers, Favorite Attendees), and 'Other Settings' (System Settings, Concur Connect, Change Password, Concur Mobile Registration).

Expense Delegates

Delegates **Delegate For**

[Delete](#)

This employee may act as a delegate for the listed employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

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

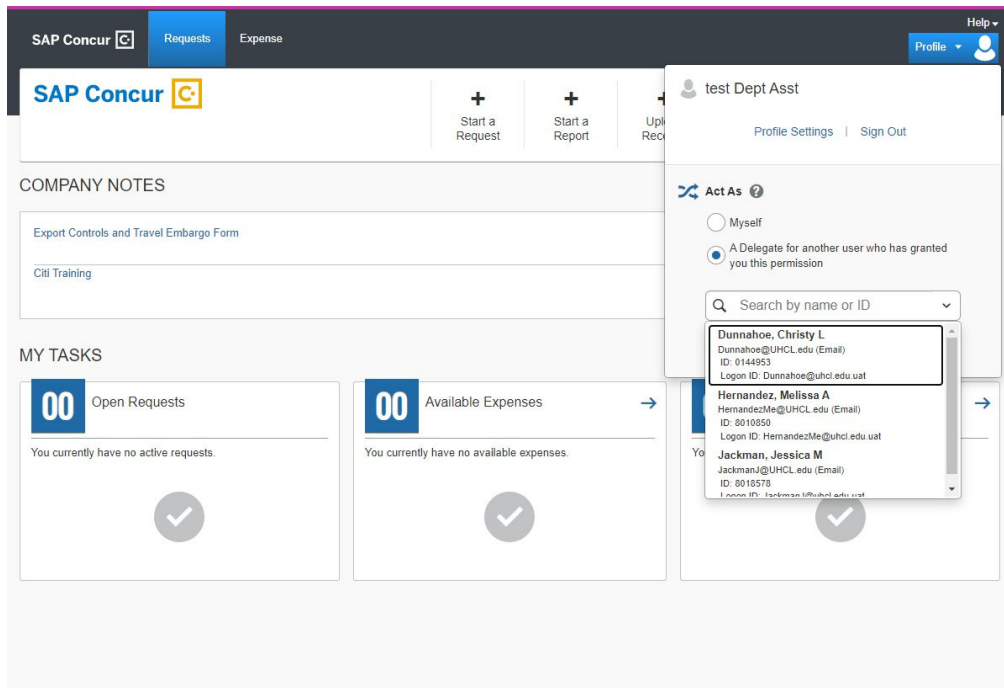
Delegate Role

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**.

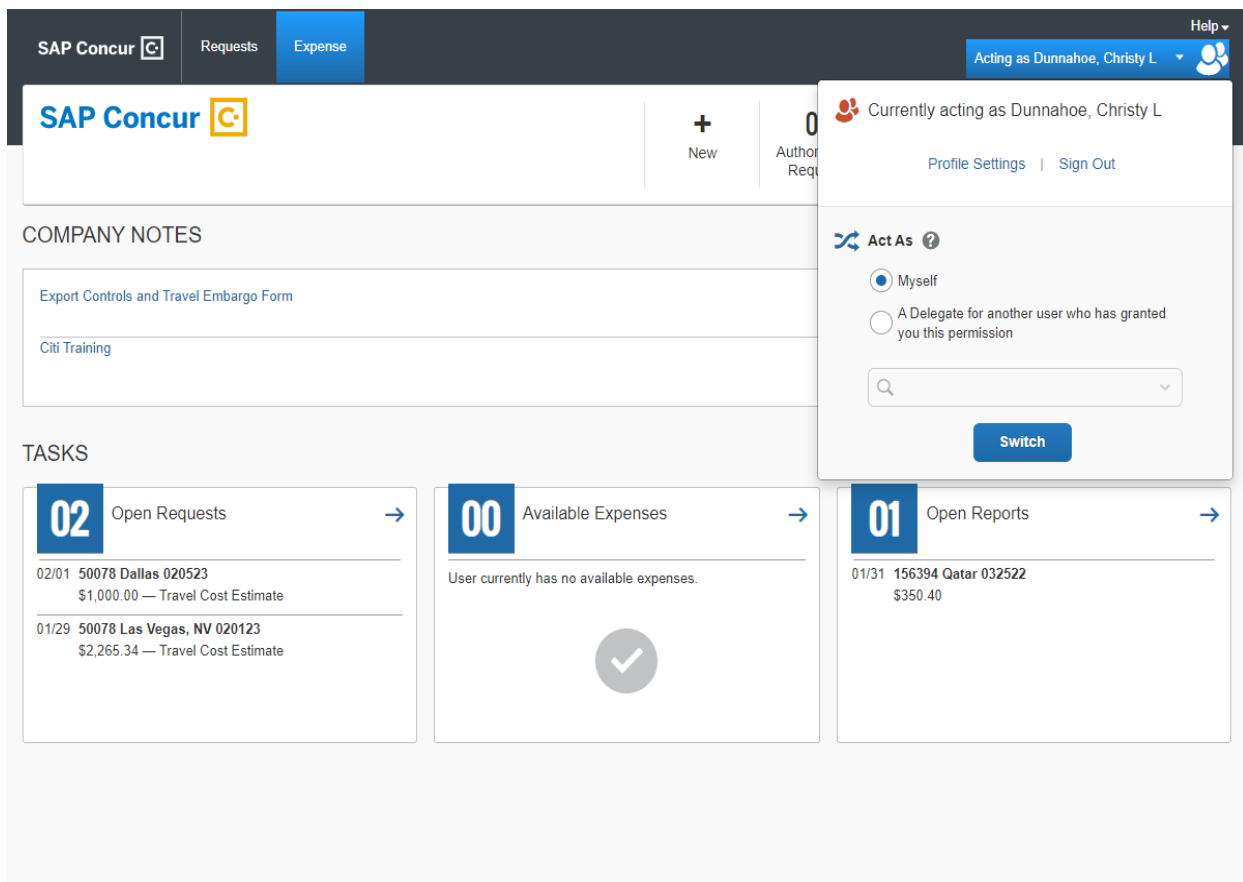
The delegate can type in the last name of the traveler they are a delegate for, or they can use the drop-down arrow and will be given a list of Travelers they have been given permissions to delegate for and select from the list. Then **Click Switch**.



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**.



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**

96146Seattle112022 11/16/2022 G66W \$1,982.27 Approved	38344Blanket111822 10/07/2022 G6DC \$72.71 Approved
---	--

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

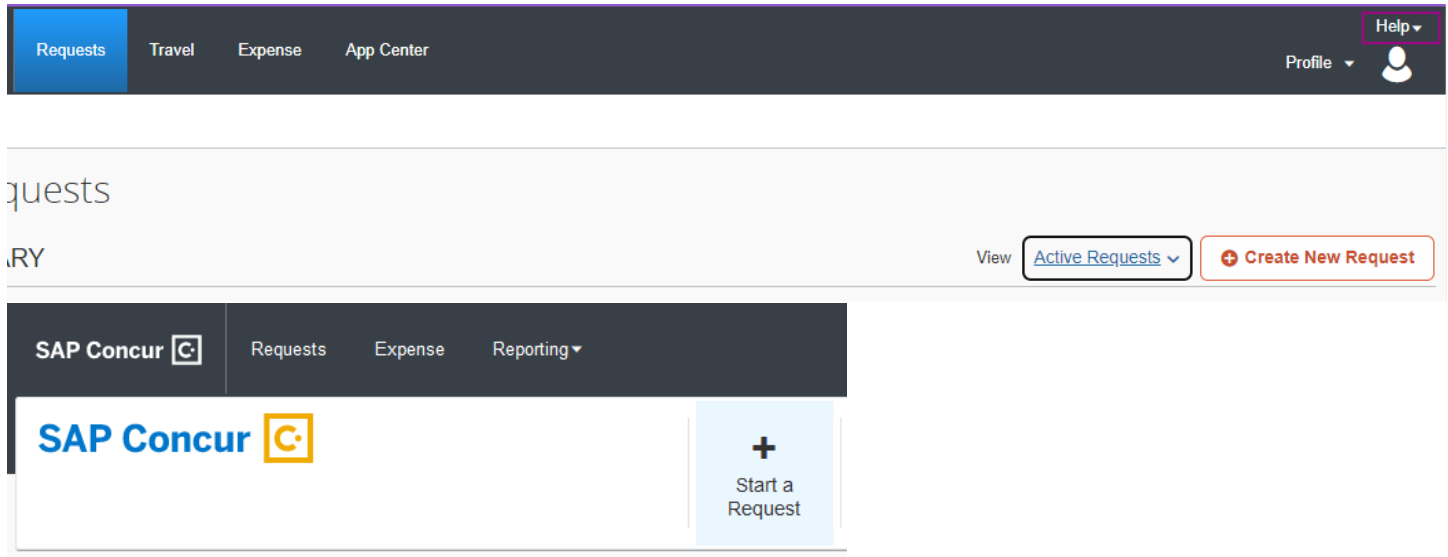
MY TASKS

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.

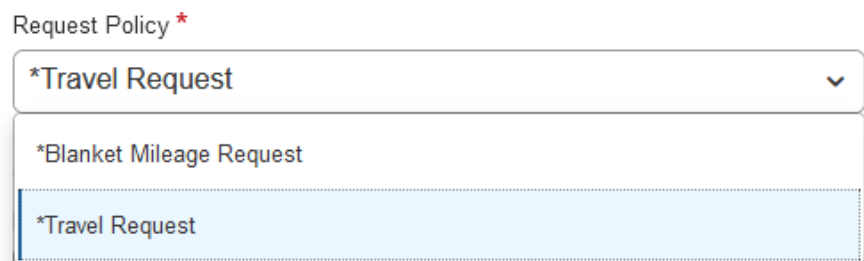


Request Policy - This Automatically defaults to the Travel Request Policy!

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 *

(00759) Univ. of Houston - Clear Lake

Fund Code *

(2078) DESIG-SALES & SERVICES-E&G

Department *

(C0056) C0056 LIBRARY

Fund Type *

LOCAL

Grant Type *

NON-GRANT

Program *

(D0450) LOST BOOK REPLACEMENT

Project *

NA

Business Unit *

(00759) Univ. of Houston - Clear Lake

Fund Code *

(2064) DESIG-TUITION

Department *

(C0004) C0004 SCHOLARSHIPS

Fund Type *

LOCAL

Grant Type *

NON-GRANT

Program *

(H0725) TUITION SCHOLARSHIPS

Project *

NA

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

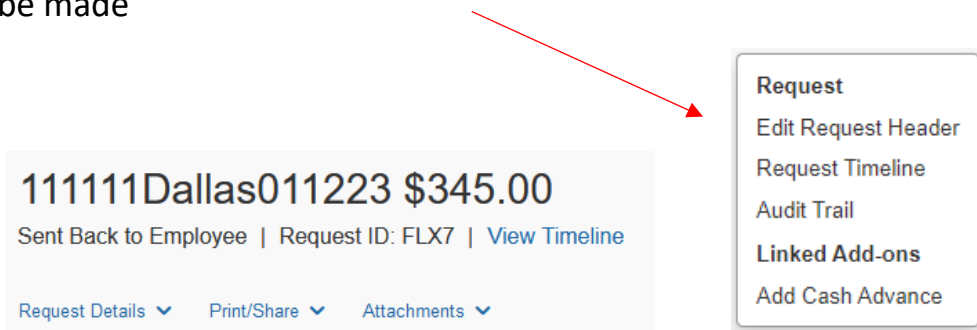
Cancel

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.

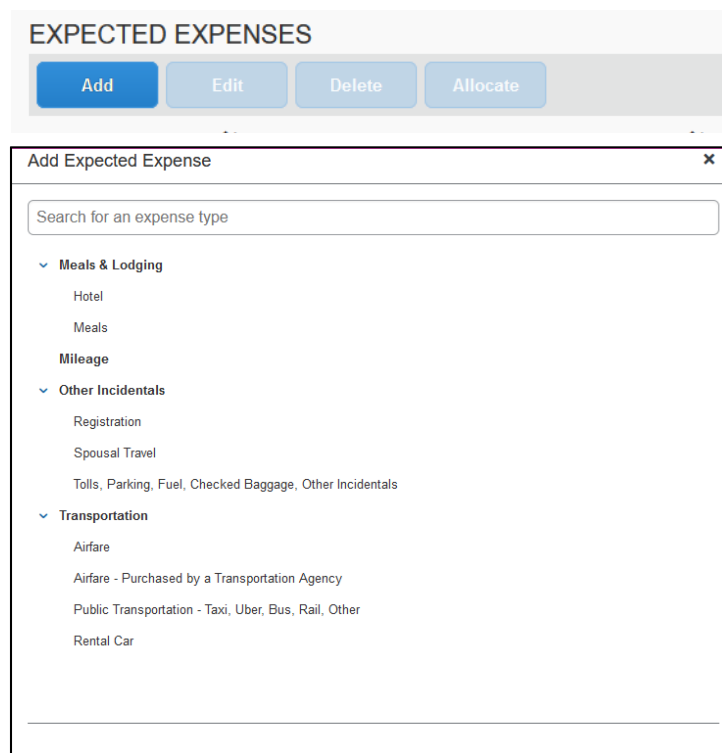
Clicking Edit Request Header will return the traveler to the request header so corrections can be made



The screenshot shows a request header card for '111111Dallas011223' with a total amount of '\$345.00'. Below the card, there are 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 four buttons: 'Add', 'Edit', 'Delete', and 'Allocate'. Below this, a modal window titled 'Add Expected Expense' is open. It features a search bar and a list of expense categories with their sub-items:

- 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

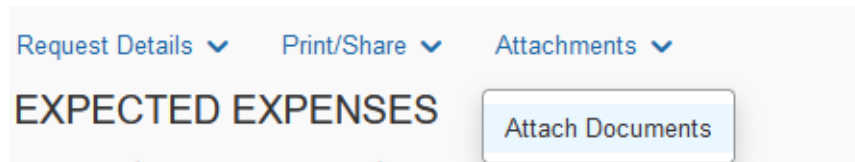
Add Edit Delete Allocate

<input type="checkbox"/>	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.

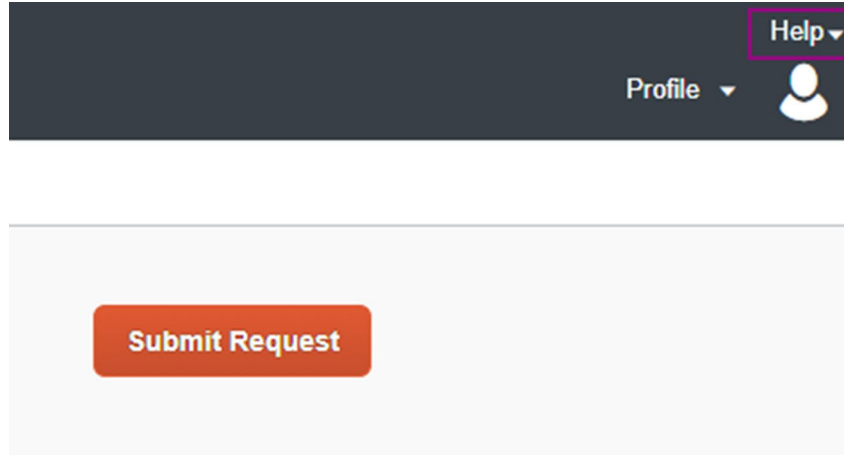
Foreign Travel requires both the completed [Export Controls and Travel Embargo Form](#) and CITI ([Collaborative Institute of Training Initiatives](#)) program certificate.

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.

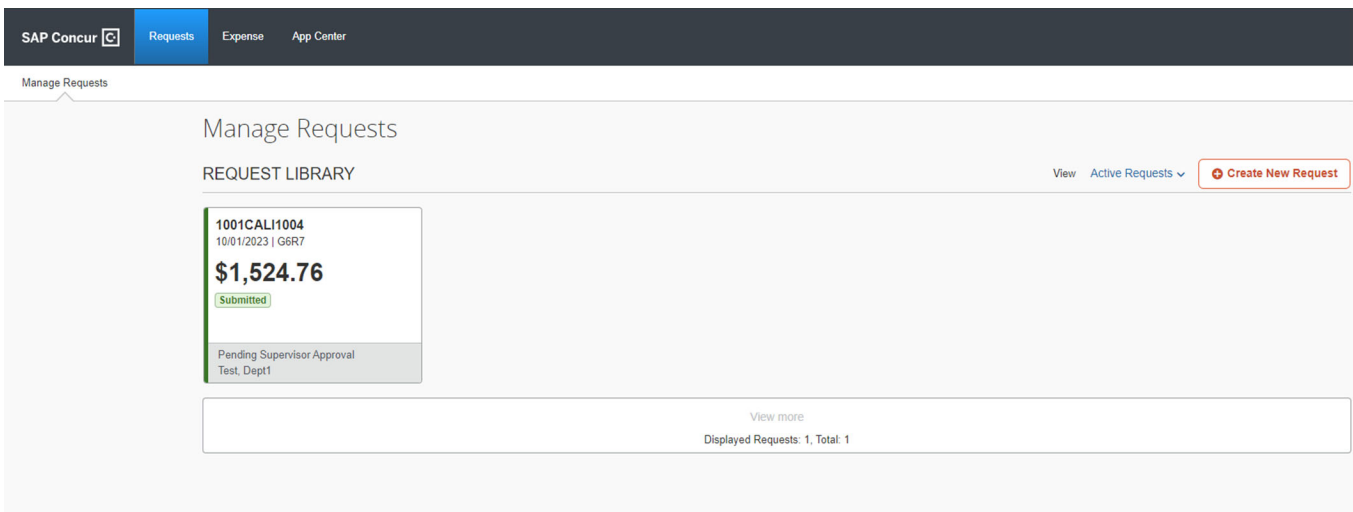


Submit Request

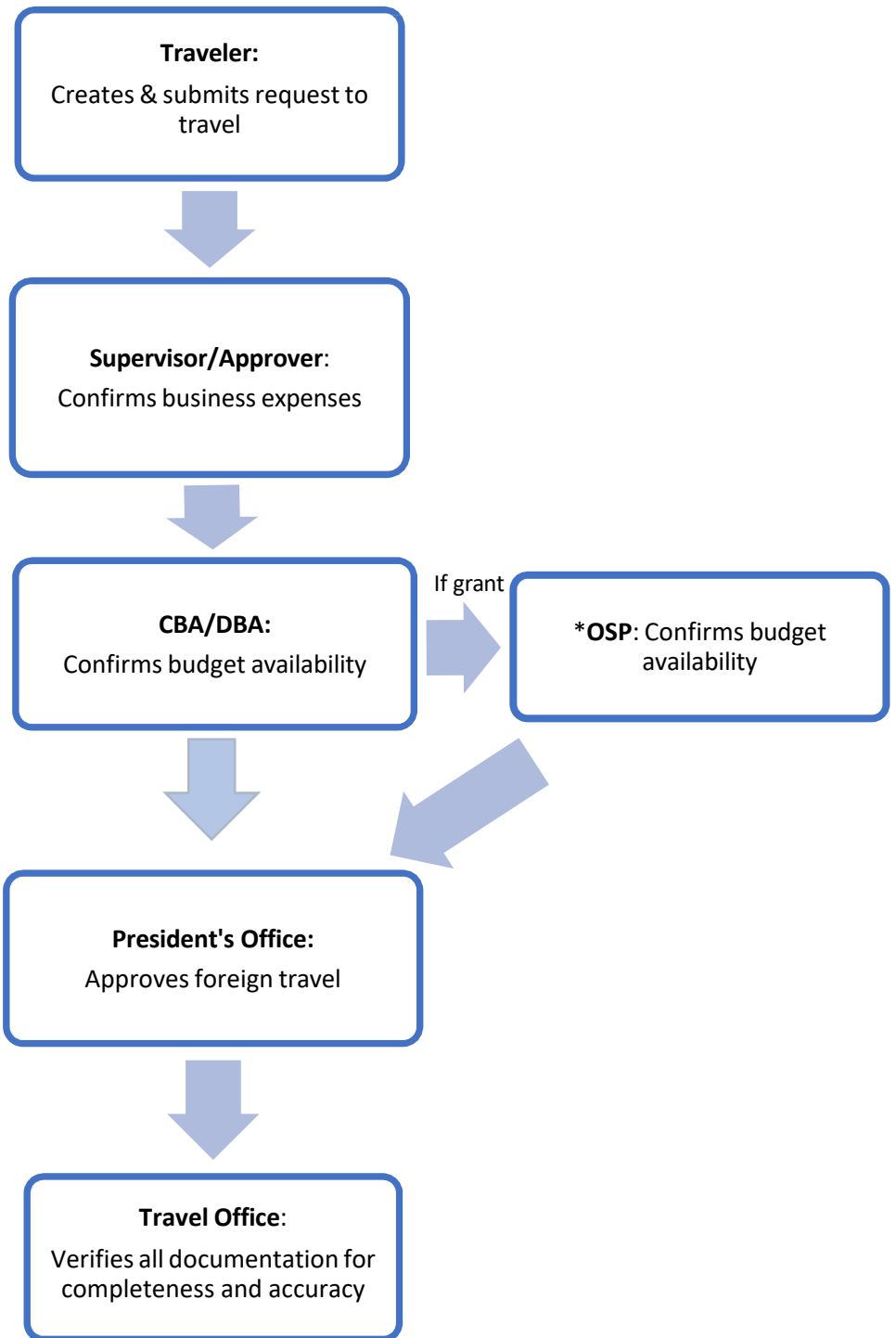
Click Submit Request at the Right top of the form. This will enter the request into the approval workflow.



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



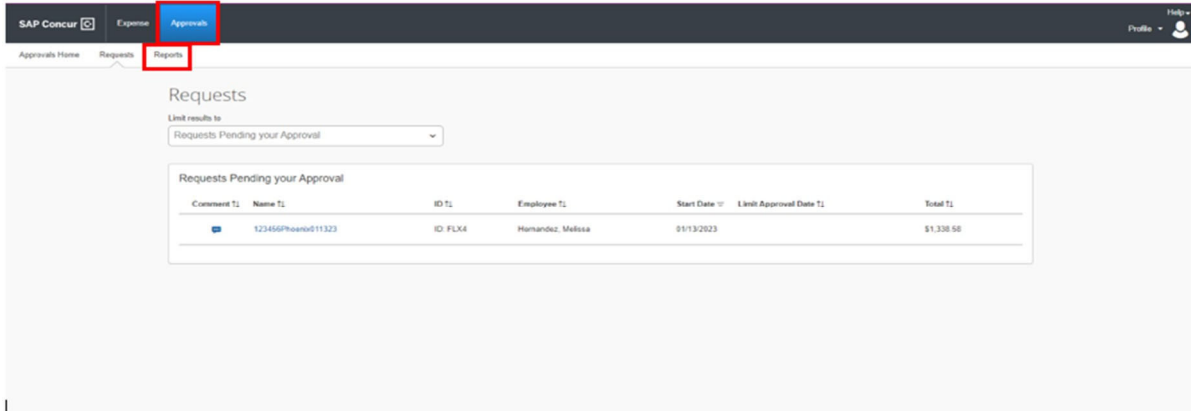
Request Approval Workflow



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

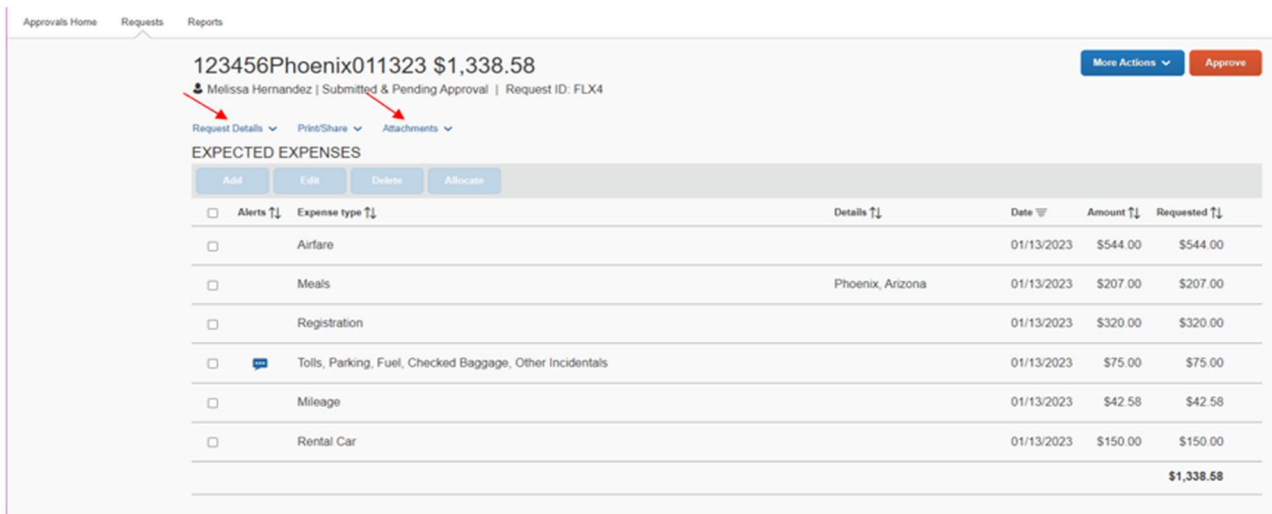
Request Approval

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

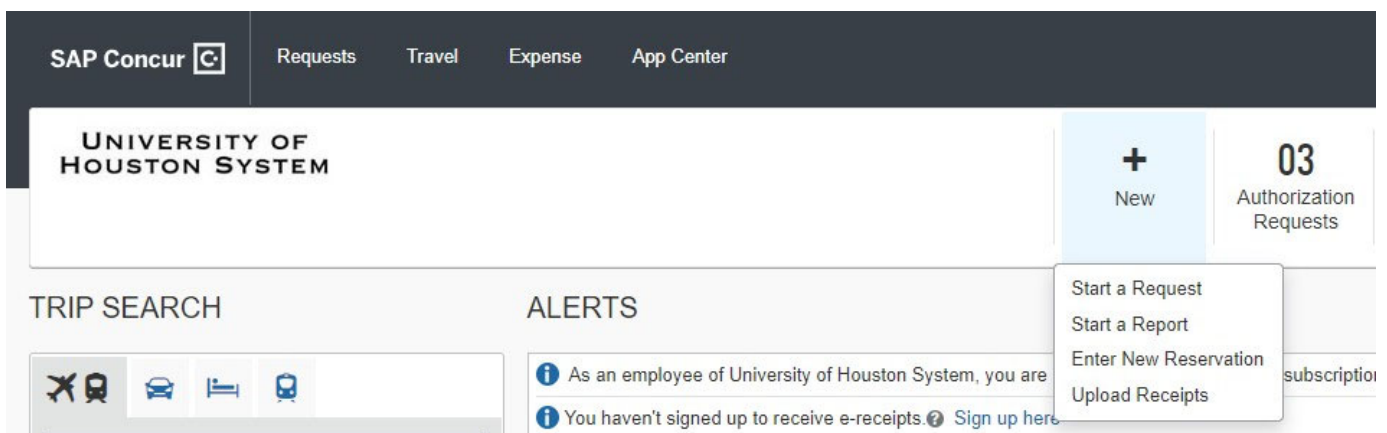
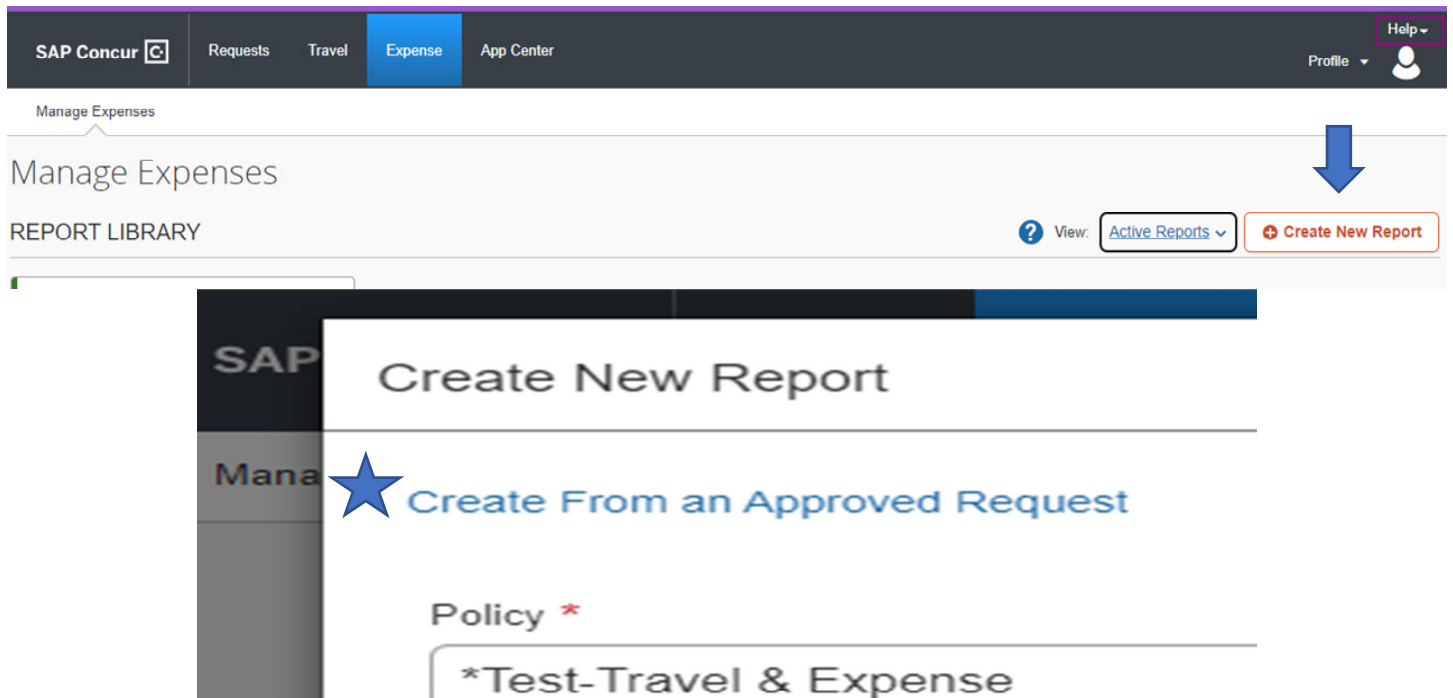
The screenshot shows the SAP Concur Expense Reporting dashboard. At the top, there are navigation tabs for 'Requests', 'Expense', and 'Reporting'. The 'Expense' tab is active. Below the navigation, there are several action buttons: '+ Start a Request', '+ Start a Report', '+ Upload Receipts', '02 Authorization Requests', '00 Available Expenses', and '02 Open Reports'. The dashboard is divided into sections: 'COMPANY NOTES' with links for 'Export Controls and Travel Embargo Form' and 'Citi Training'; 'MY TASKS' with three tiles: '02 Open Requests' (listing two reports with amounts), '00 Available Expenses' (indicating no available expenses), and '02 Open Reports' (listing two reports with amounts).

The screenshot shows the 'Manage Expenses' page. It features a 'REPORT LIBRARY' section with a 'View: Active Reports' dropdown and a 'Create New Report' button. Below this are three report cards: two 'NOT SUBMITTED' reports (one for Dallas with amount \$1,033.99 and one for Seattle with amount \$1,155.00) and one 'SUBMITTED' report for New Orleans with amount \$1,469.04 and a 'Pending Travel Office Review' status. The 'AVAILABLE EXPENSES' section has a 'View: All Expenses' dropdown and buttons for 'Delete', 'Combine Expenses', and 'Move to'. It currently shows 'No Expenses' with a note: 'When expenses come in, they will be added to this list.' The 'AVAILABLE RECEIPTS' section has a note about valid file types and an 'Upload New Receipt' button with a 'Receipt parking.pdf' thumbnail.

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 below the toolbar shows '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', 'Last signed in: 02/23/2023 01:57 pm', and '© Copyright 2023 - SAP Concur - All Rights Reserved'.

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
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 08:30 PM	Houston, Texas	01/29/2023 08:30 PM	HARRIS COUNTY, US-TX, US
Itinerary: 123987NewOrleans02/02/22				
Houston, Texas	01/30/2023 11:00 AM	New Orleans, Louisiana	01/30/2023 01:00 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)**

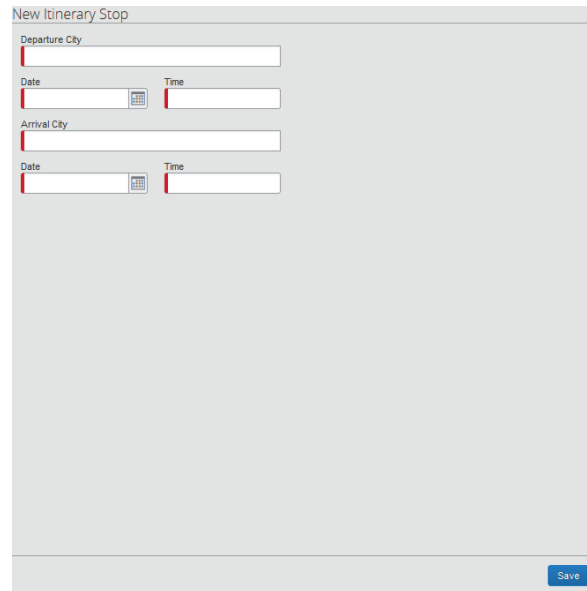
Click Save at the bottom right.

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.

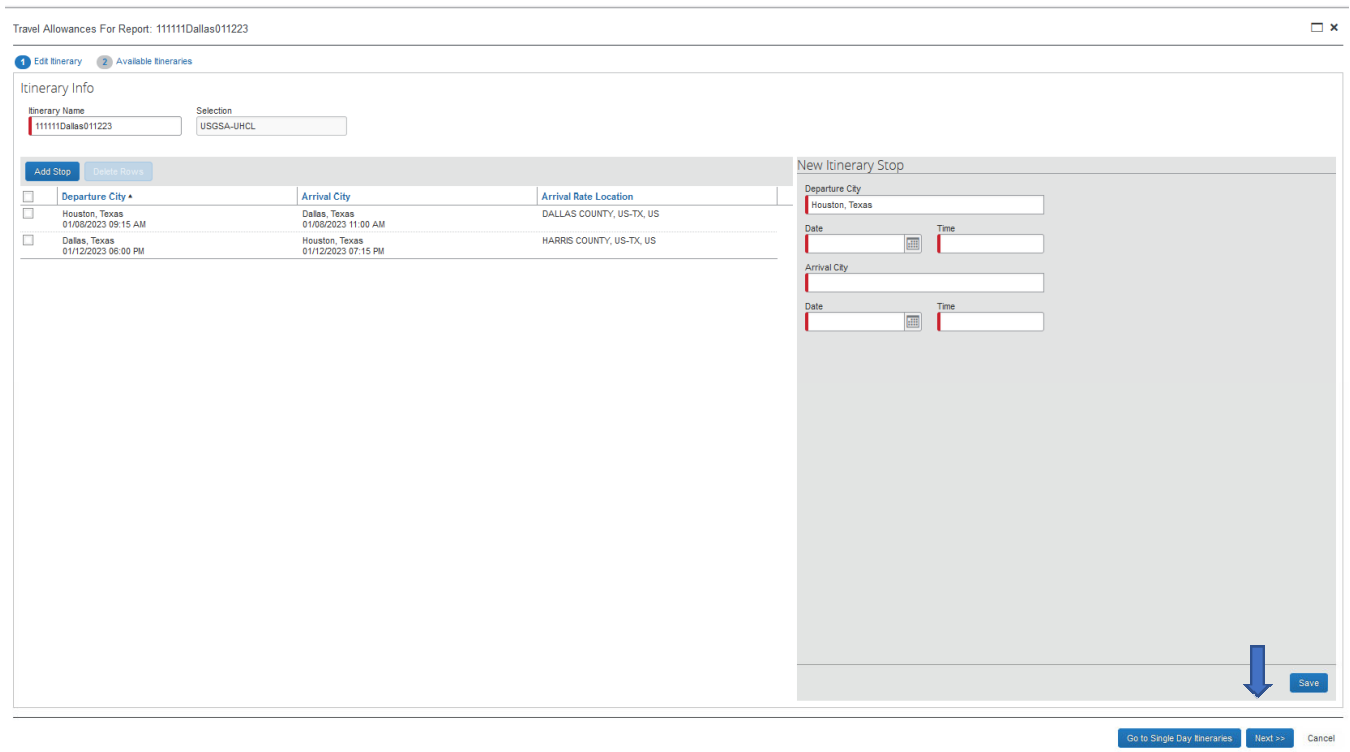
If your travel is to **multiple cities**, this step will need to be **completed for each segment**.

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 screenshot of a 'New Itinerary Stop' form. It contains two sets of input fields. The first set includes a 'Departure City' text box, a 'Date' field with a calendar icon, and a 'Time' text box. The second set includes an 'Arrival City' text box, a 'Date' field with a calendar icon, and a 'Time' text box. A 'Save' button is located at the bottom right of the form.

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



The main interface for managing itineraries. At the top, it shows 'Travel Allowances For Report: 11111Dallas011223' and a close button. Below this are two tabs: '1 Edit Itinerary' (active) and '2 Available Itineraries'. The 'Itinerary Info' section shows 'Itinerary Name' as '11111Dallas011223' and 'Selection' as 'USGSA-UHCL'. Below this is a table with columns for 'Departure City', 'Arrival City', and 'Arrival Rate Location'. Two rows are listed, each with a checkbox on the left. To the right of the table is a 'New Itinerary Stop' form, which is partially filled with 'Houston, Texas' for the departure city. At the bottom right of the form, a blue arrow points down to a 'Save' button. At the very bottom of the page, there are three buttons: 'Go to Single Day Itineraries', 'Next >>', and 'Cancel'.

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

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

Edit Unassign

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

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	01/30/2023 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

Done

Add Each Expense Type

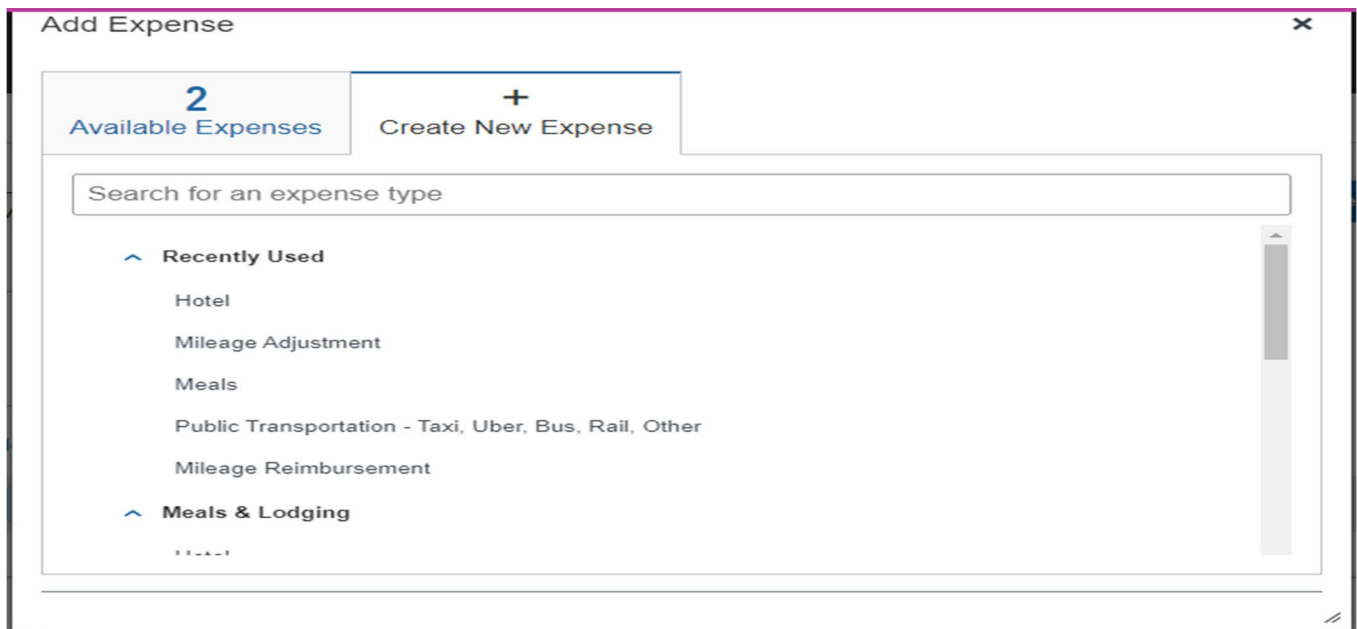
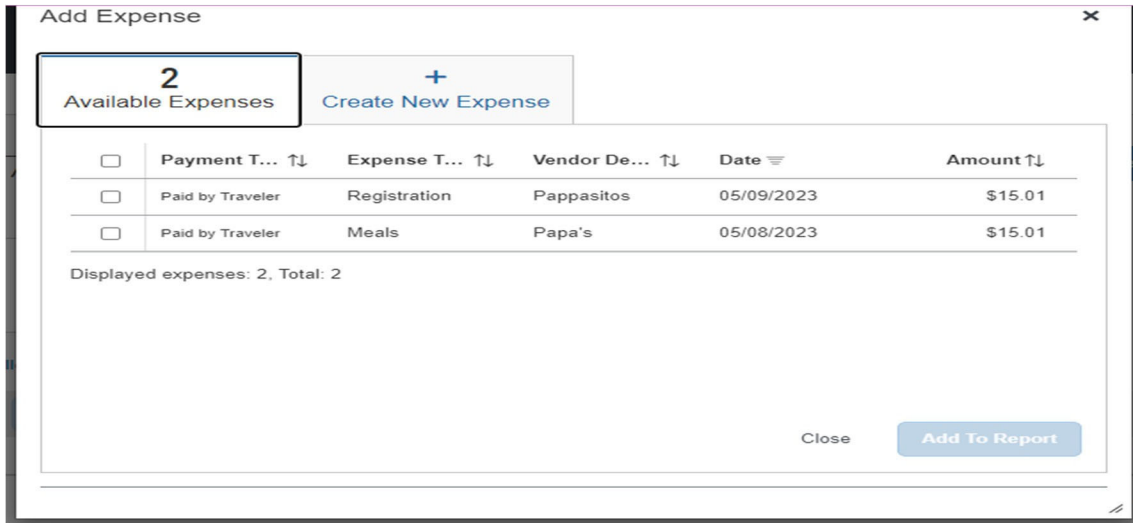
Begin adding expenses by **Clicking** Add Expense

The screenshot displays the SAP Concur Expense Reporting interface. At the top, there is a navigation bar with 'SAP Concur' logo, 'Requests', 'Expense' (selected), and 'Reporting' menus. On the right, there are links for 'Administration', 'Help', and 'Profile'. Below the navigation bar, there are tabs for 'Manage Expenses' and 'Process Reports'. The main content area shows a report for '111111Dallas011223' with a total amount of '\$0.00'. It is marked as 'Not Submitted' with a 'Report Number: BW1HL0'. There are 'Delete Report' and 'Submit Report' buttons. Below this, there are links for 'Report Details', 'Manage Receipts', and 'Travel Allowance'. A 'REQUEST' box shows 'Approved \$1,817.58'. A toolbar contains buttons for 'Add Expense', 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. The main area displays 'No Expenses' and a message: 'Add expenses to this report to submit for reimbursement.' The footer includes the SAP logo, 'SAP Concur' logo, '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

The screenshot shows the 'New Expense' form in SAP Concur. The 'Expense Type' is set to 'Airfare', 'Traveler Type' is 'Employee', and the 'Amount' is '134.15'. A large red box on the right side of the form 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 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 instructions: 'Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.' Below this, there is a large red box with an 'Upload New Receipt' button and instructions: 'Drag and drop files to upload a new receipt.' To the right of this box, there is a preview of a file named '6_Redacted.pdf' with the upload date '02/24/2023 8:14 PM'. Below the preview are 'Attach' and 'View' buttons. At the bottom right of the dialog box is a 'Close' button.

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 - 111111Dall...

Comment

Save Expense **Save and Add Another** Cancel

1 of 5

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 fl
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...

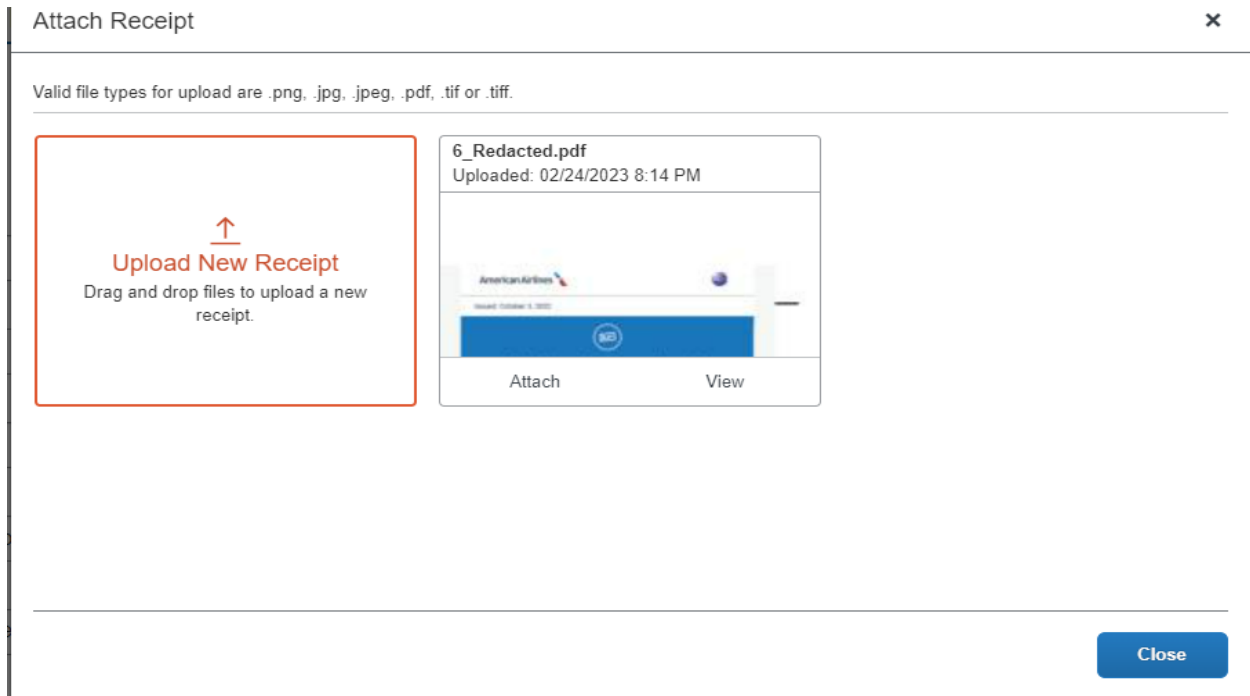
Comment

Save Expense Save and Add Another Cancel

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.

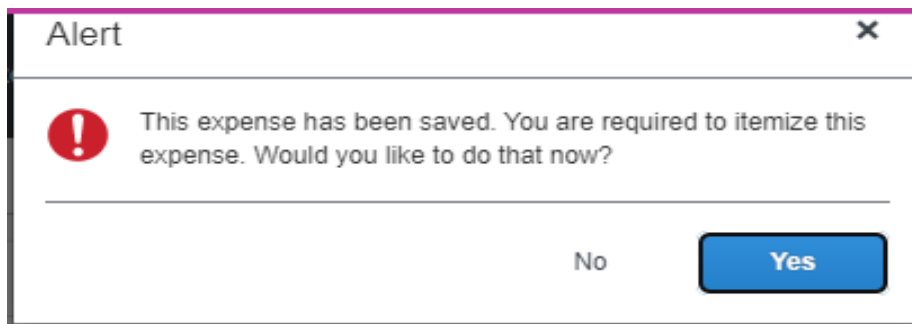
Add Receipt

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 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 type="text"/>	<input type="text"/>	<input type="text"/>	<input 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 type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
01/09/2023	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
01/10/2023	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
01/11/2023	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input 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.

The screenshot shows the 'Itemizations' tab for an expense. At the top, the 'Amount' is \$1,155.00, the 'Itemized' amount is \$1,155.00, and the 'Remaining' amount is \$0.00. Below this is a table of itemizations with columns for Date, Expense Type, and Requested amount. To the right is a red-bordered box for uploading receipts, 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.'

<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

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



The screenshot shows an error message at the top: 'The itemization amounts do not add up to the expense amount. View'. Below this, the expense details are shown: 'Hotel \$700.00' for '09/23/2022' at 'Omni Hotels'. The 'Itemizations' tab is active, and the summary at the bottom shows: Amount \$700.00, Itemized \$675.00, and Remaining \$25.00 with a blue star icon next to it.

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

<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 *
Hotel Tax

Traveler Type *
Employee

Travel Type *
Out of State

Transaction Date *
09/16/2022

Enter Vendor Name
Omni Hotels

City of Purchase
Dallas, Texas

Amount *
25.00

Currency
US, Dollar

Approved Amount
25.00

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.

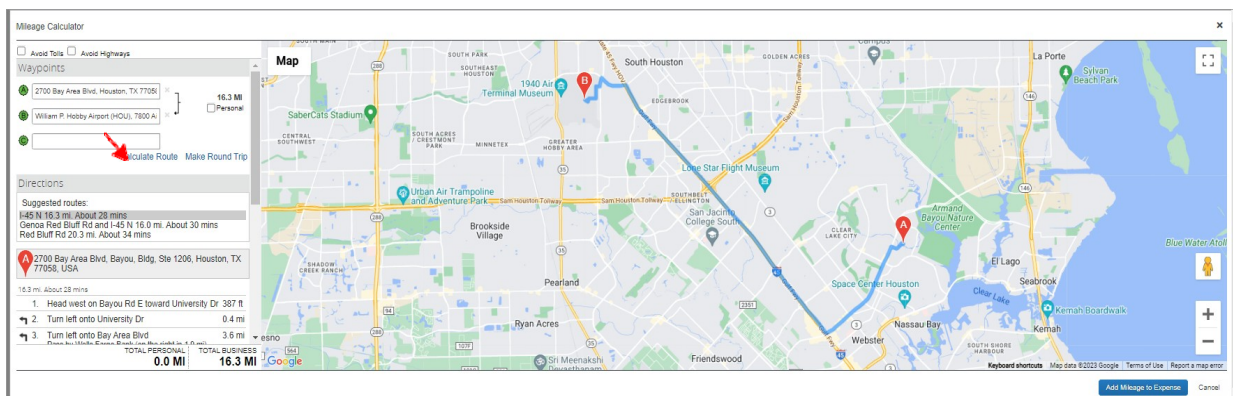
*This is a very intuitive app. Entry can be by common destination names such as airports, schools, convention centers, landmarks, etc. (Examples: Dallas Convention Center, Minute Maid Park, Hobby Airport) or by address.

The screenshot shows a web form for calculating mileage. It includes several sections: Expense Type (Mileage Reimbursement), Traveler Type (Employee), and Travel Type (In-State). There are fields for Transaction Date (01/08/2023), From Location (UHCL), To Location (Hobby Airport), and Payment Type (Paid by Traveler). A Request dropdown shows a date and amount. A Comment field is present but empty. At the bottom, there are fields for Distance (0), Amount (0.00), Currency (US, Dollar), and Reimbursement Rates (USD 0.625 per mile). Buttons for 'Save Expense', 'Save and Add Another', and 'Cancel' are at the bottom.

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 following fields and options:

- Expense Type ***: Public Transportation - Taxi, Uber, Bus, Rail, Other
- Traveler Type ***: Employee
- Travel Type ***: In-State
- Transaction Date ***: 01/12/2023
- Enter Vendor Name**: (empty text field)
- City of Purchase**: (empty text field)
- Payment Type ***: Paid by Traveler
- Amount ***: (empty text field)
- Currency ***: US, Dollar
- Approved Amount**: (empty text field)
- Comment**: (empty text area)
- Buttons**: Save Expense, Save and Add Another, Cancel
- Receipt Upload Area**: Add Receipt button, 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 'Attach Receipt' dialog box contains the following elements:

- Header**: Attach Receipt
- Instructions**: Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.
- Upload Area**: Upload New Receipt button, Drag and drop files to upload a new receipt.
- Receipt List**:
 - File name: 6_Redacted.pdf
 - Uploaded: 02/24/2023 8:14 PM
 - Thumbnail: American Airlines receipt
 - Buttons: Attach, View
- Footer**: Close button

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

New Expense

Cancel Save Expense

Details Itemizations Hide Receipt

Allocate

Expense Type * Required field
Registration

Traveler Type * Employee
Travel Type * In-State

Transaction Date * 01/13/2023
Enter Vendor Name

City of Purchase Dallas, Texas
Payment Type * Paid by Traveler

Amount *
Currency * US, Dollar

Approved Amount
Request * 01/08/2023, \$250.00 - 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 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.

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

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.

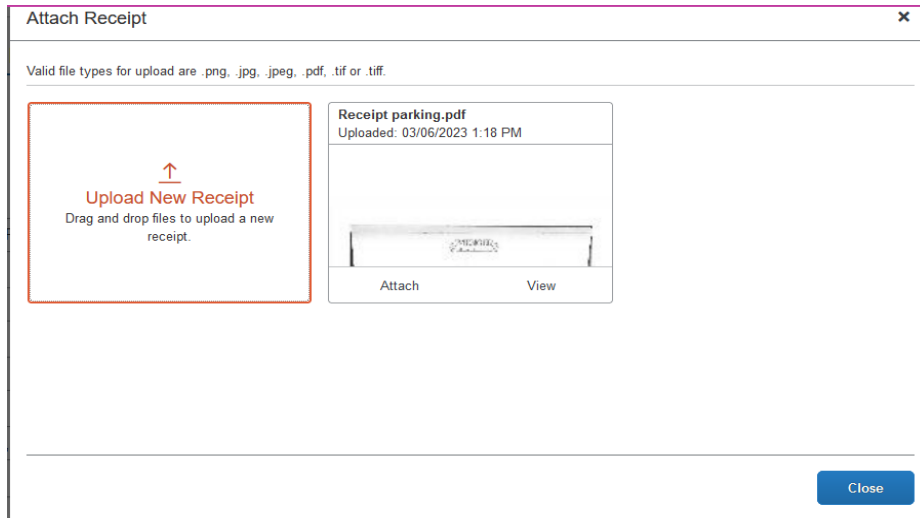
Click add receipt

The screenshot shows a web application interface for entering a new expense. The form is titled "New Expense" and has two tabs: "Details" (selected) and "Itemizations". At the top right, there are "Cancel" and "Save Expense" buttons. Below the tabs, there is an "Allocate" icon and a "* Required field" label. The form fields are organized into two columns:

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

At the bottom left, there are three buttons: "Save Expense", "Save and Add Another", and "Cancel". On the right side, there is a large red-bordered area for adding receipts. It contains an "Add Receipt" button with an upward arrow icon 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.

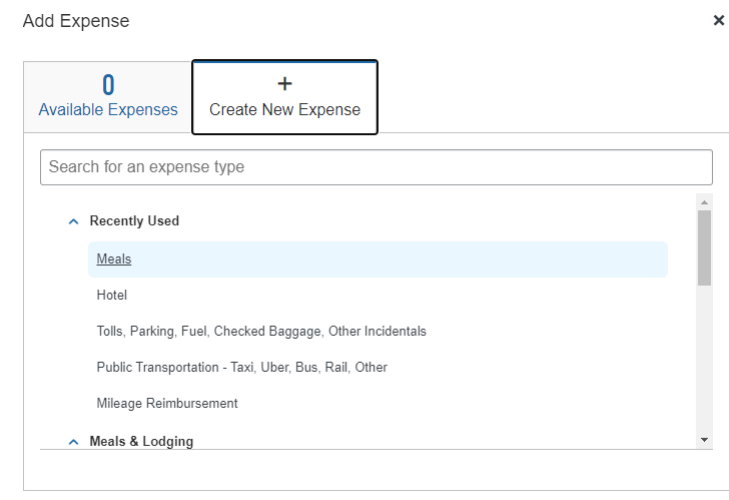


Meal Expense

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 a web form for entering an expense. The form is divided into two tabs: "Details" (selected) and "Itemizations". On the right side of the form, there is a "Hide Receipt" button. The "Details" section includes an "Allocate" icon and a "* Required field" label. The fields are as follows:

- Expense Type*: Meals (dropdown)
- Traveler Type*: Employee (dropdown)
- Travel Type*: In-State (dropdown)
- Transaction Date*: 03/11/2023 (calendar icon)
- Enter Vendor Name: Piping Hot Pizza (text input)
- City of Purchase*: Dallas, Texas (dropdown)
- Payment Type*: Paid by Traveler (dropdown)
- Amount*: 16.02 (text input)
- Currency*: US, Dollar (dropdown)
- GSA Meal Allowance
- Request*: 01/08/2023, \$345.00 - 111111Dall... (dropdown)
- Comment: (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 for uploading a receipt. It contains an "Add Receipt" button with an upload icon 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."

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, there are two buttons: "No" and "Yes". The "Yes" button is highlighted in blue.

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". The "Itemizations" tab is active, showing a summary table:

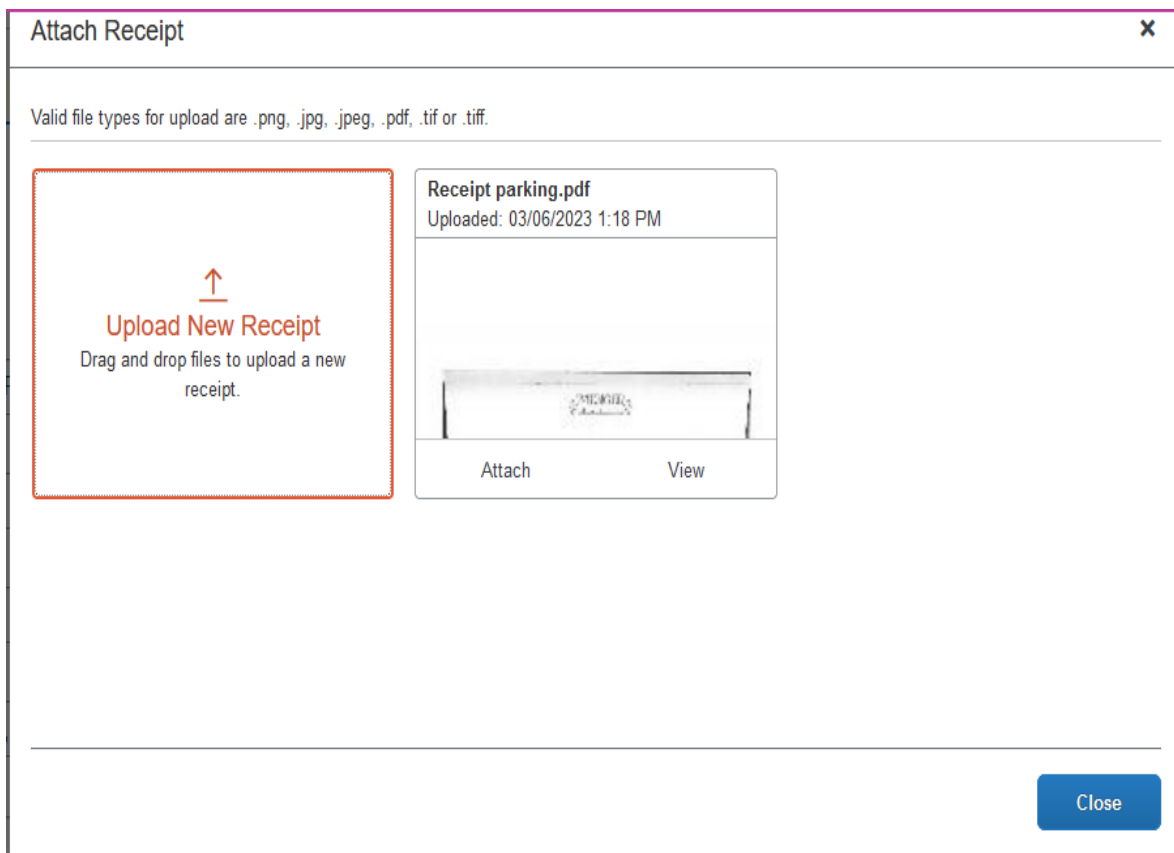
Amount	Itemized	Remaining
\$16.02	\$0.00	\$16.02

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 left of the form are "Save Itemizations" and "Cancel" buttons. On the right side, there is a "Hide Receipt" button and a large red-bordered box containing an "Add Receipt" button with an upload icon 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.

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 the 'Meals \$13.28' expense form. At the top, there are navigation arrows and the title 'Meals \$13.28'. Below the title, the date '07/14/2022' and vendor 'McDonald's' are displayed. The form has two tabs: 'Details' (selected) and 'Itemizations'. In the 'Details' tab, there is an 'Allocate' button with a circular icon, highlighted by a red arrow. Below the 'Allocate' button, there are several required fields marked with an asterisk (*):
- Expense Type: Meals
- Traveler Type: Employee
- Transaction Date: 07/14/2022
- City of Purchase: Austin, Texas
- Amount: 13.28
- Request: None
- Travel Type: In-State
- Enter Vendor Name: McDonald's
- Payment Type: Paid by Traveler
- Currency: US, Dollar
A 'Comment' text area is located below the 'Request' dropdown. At the bottom of the form, there are 'Save Expense' and 'Cancel' buttons.

Click Add.

The screenshot shows the 'Allocate' dialog box. At the top, it says 'Allocate' and 'Itemizations: 2 | \$13.28'. Below this, there is a summary table:

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

Below the table, there is a section for 'Default Allocation' with a table:

Code	Percent %
Default	100

Below the table, there are buttons: 'Add', 'Edit', 'Remove', and 'Save as Favorite'. In the center, there is a message: 'No Allocations. These expenses are assigned to your default allocation shown above. Click the allocate button to allocate part or all of these expenses differently.' At the bottom right, there are 'Cancel' and 'Save' buttons.

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%

Default Allocation

Code Default Percent % 0

Add Edit Remove Save as Favorite

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	02154 BUSINESS OPERATIONS	LOCAL	DESIG-TUITION	AVP - FINANCE	NA	NON-GRANT	UHCL-In-State-00759-C2154-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 BY MARRIOTT Austin	02/28/2023	(\$31.93)
<input checked="" type="checkbox"/>	Citi Bank	Undefined	COURTYARD BY MARRIOTT Austin	02/19/2023	\$112.58
<input type="checkbox"/>	Citi Bank	Undefined	COURTYARD BY MARRIOTT 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](#)

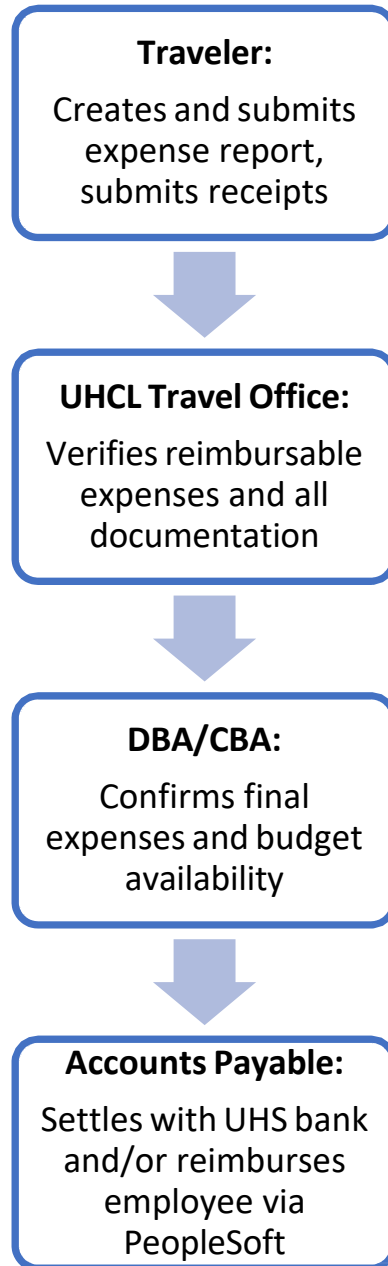
[Add Expense](#) [Edit](#) [Delete](#) [Copy](#) [Allocate](#) [Combine Expenses](#) [Move to](#)

<input checked="" type="checkbox"/>	Alerts ↑↓	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓
<input checked="" type="checkbox"/>	!		Citi Bank	Undefined	Courtyards 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.

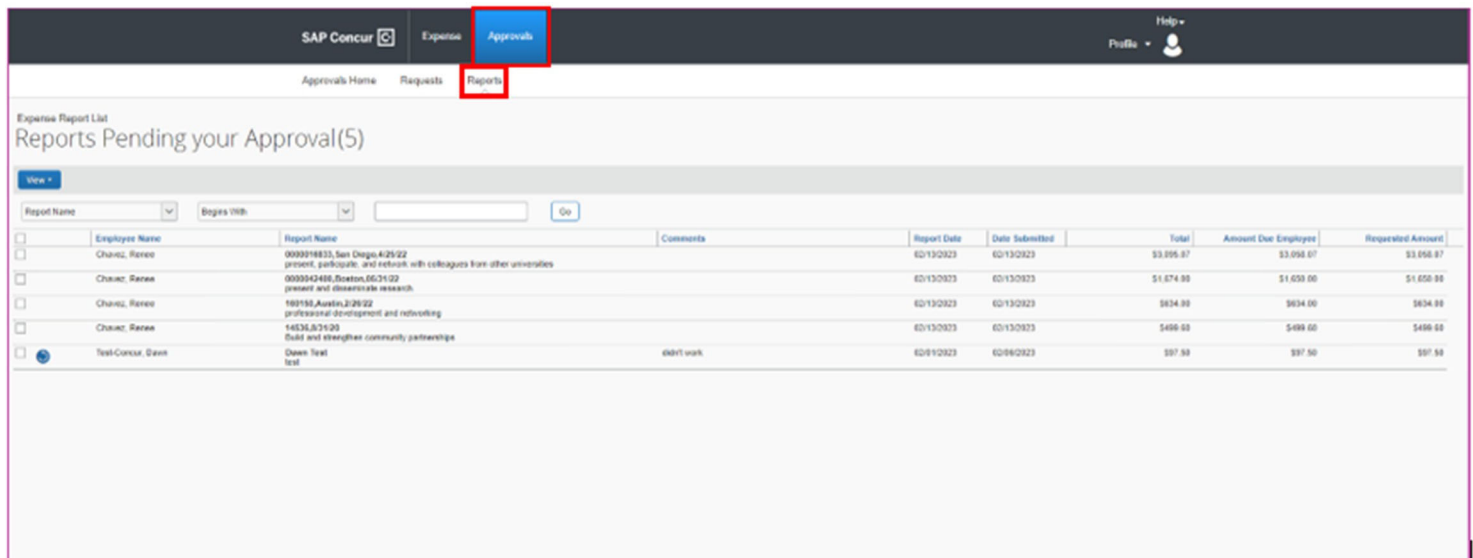
- Any expenses charged to the Travel Card which are non-reimbursable in Concur must be repaid to UHCL within **45 business days**.
- Repayment must be made at the Student Business Services (SBS) window at the Student Services Classroom Building by bringing (a) a check or cash, and (b) 2 copies of the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



Expense Report List
Reports Pending your Approval(5)

View +

Report Name: [dropdown] Begins With: [input] Go

<input type="checkbox"/>	Employee Name	Report Name	Comments	Report Date	Date Submitted	Total	Amount Due Employee	Repeated Amount
<input type="checkbox"/>	Chavez, Renee	000919833, San Diego 4/29/22 present, participate, and network with colleagues from other universities		02/13/2023	02/13/2023	\$3,096.87	\$3,096.87	\$3,096.87
<input type="checkbox"/>	Chavez, Renee	000942488, Boston, 06/21/22 present and disseminate research.		02/13/2023	02/13/2023	\$1,674.00	\$1,650.00	\$1,650.00
<input type="checkbox"/>	Chavez, Renee	189198, Austin, 2/29/22 professional development and networking		02/13/2023	02/13/2023	\$634.00	\$634.00	\$634.00
<input type="checkbox"/>	Chavez, Renee	14536, 8/1/20 Build and strengthen community partnerships		02/13/2023	02/13/2023	\$499.00	\$499.00	\$499.00
<input type="checkbox"/>	Test Concur, Dawn	Dawn Test test	edit work.	02/13/2023	02/08/2023	\$97.50	\$97.50	\$97.50

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 breadcrumb trail 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			
05/04/2022 Airfare Frontier Airlines Houston, Texas	N	\$570.00	\$570.00
Expense Type: Hotel			
05/01/2022 Hotel Days Inn Houston, Texas	Y	\$700.00	\$700.00
05/09/2022 Hotel	N	\$195.00	\$195.00
05/08/2022 Hotel	N	\$195.00	\$195.00
05/08/2022 Hotel	N	\$195.00	\$195.00
05/07/2022 Hotel	N	\$195.00	\$195.00
Expense Type: Meals			
05/01/2022 Meals McDonalds, Boston, Massachusetts	N	\$38.00	\$38.00
05/01/2022 Meals	N	\$38.00	\$38.00
05/08/2022 Meals Dunkin, Boston, Massachusetts	N	\$38.00	\$38.00
05/08/2022 Meals	N	\$38.00	\$38.00
05/08/2022 Meals Burger King Boston, Massachusetts	N	\$40.00	\$38.32
05/08/2022 Meals McDonalds, Boston, Massachusetts	N	\$47.00	\$42.00
05/08/2022 Meals Panera, Boston, Massachusetts	N	\$58.00	\$41.58
05/08/2022 Meals McDonalds, Boston, Massachusetts	N	\$45.00	\$37.42
05/07/2022 Meals McDonalds, Boston, Massachusetts	N	\$38.00	\$38.00
05/07/2022 Meals McDonalds, Houston, Texas	N	\$38.00	\$38.00
TOTAL AMOUNT		\$1,674.00	\$1,650.00

Expense Detail View:

Expense Type: hotel, Transfer Type: Employee, Travel Type: Out of State, Transaction Date: 05/01/2022

Vendor: Days Inn, City of Purchase: Houston, Texas, Payment Type: Paid by Traveler, Amount: 700.00 USD

Forwarded: Yes, Approved Amount: Pay Date: 700.00

Comment: [Empty]

Total Amount: \$700.00 | Remained: \$700.00 | Remaining: \$0.00

Buttons: Approve Expense, Send Back to Employee, Send to Approver, Expense

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.

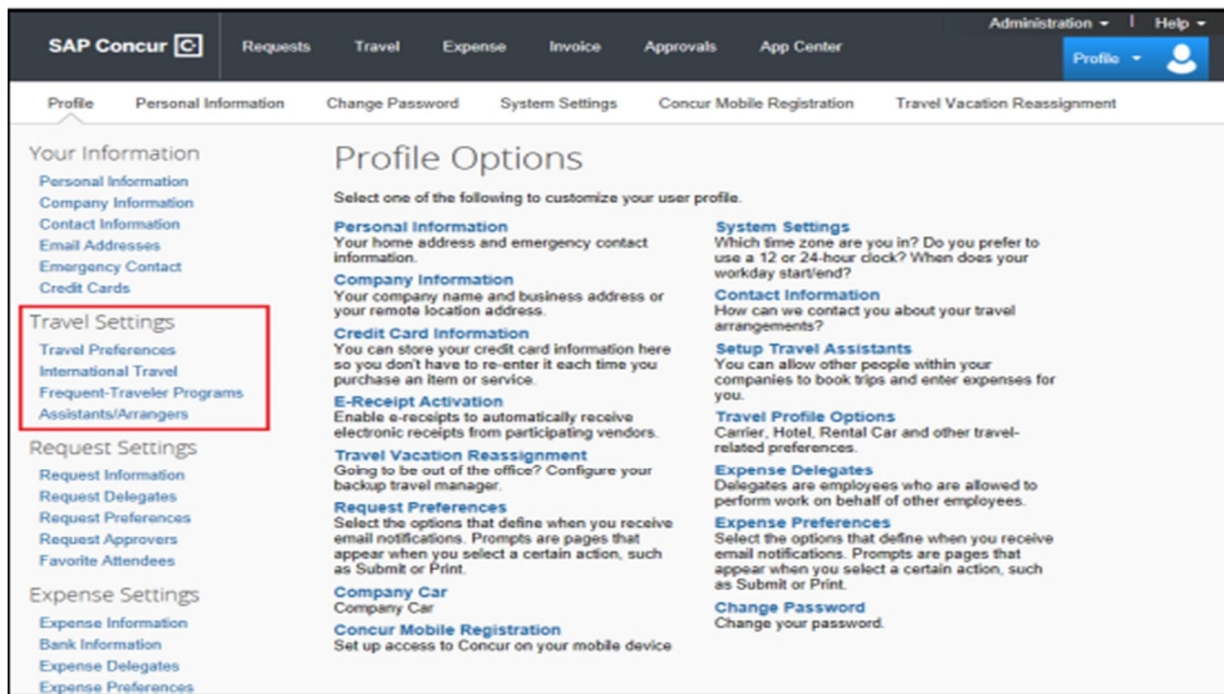
Use the options to set or change your personal preferences and settings, which include:

- 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

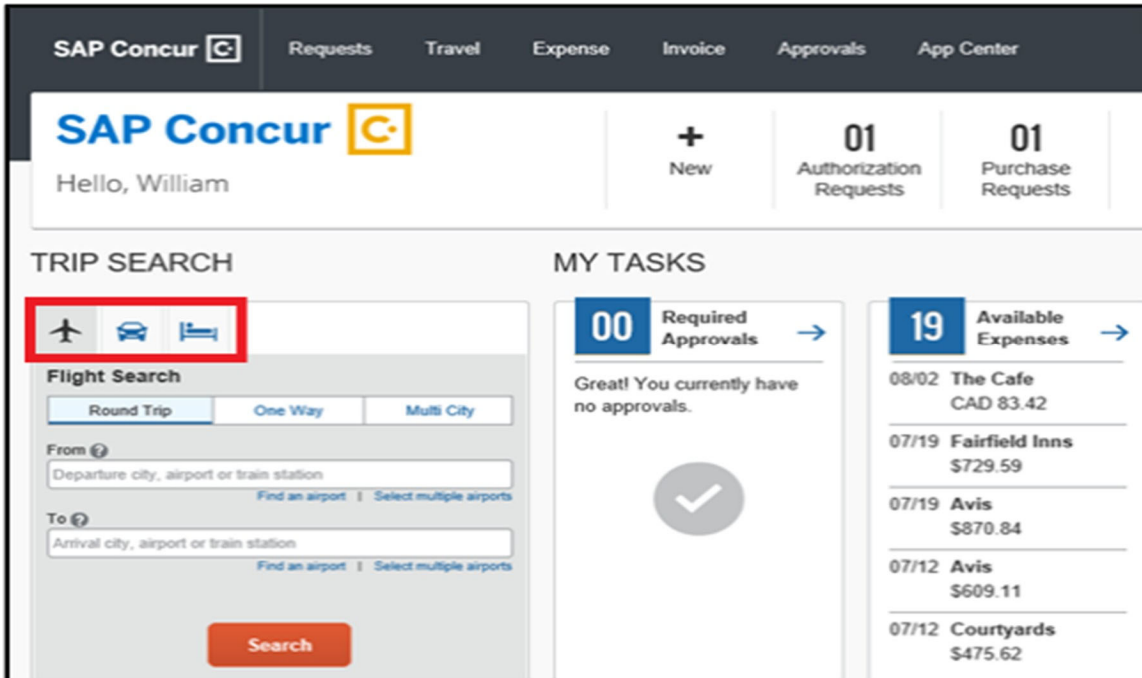
1. If you are a travel arranger and you want to change the profile of one of your users, **Click Profile**.
2. In the Administer for Another User Field, type the first few letters of the user's name.
3. Select the appropriate user from the search results, and then **Click Start Session**.
Accessing your 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, a time selection of "Morning", and a time range of "± 3". The "Return" field shows the date "03/31/2023", a "depart" dropdown, a time selection of "Afternoon", and a time range of "± 3". There are two checkboxes: "Pick-up/Drop-off car at airport" (unchecked) and "Find a Hotel" (unchecked). Below these are "Class" and "Search by" dropdowns, with "Highest allowed" and "Schedule" selected respectively. There are also two 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 100 results	Preferred				
1 stop 93 results	795.40 2 results	620.40 28 results	620.40 8 results	745.40 33 results	777.40 22 results
2 stops 7 results	—	—	771.19 3 results	—	896.19 4 results

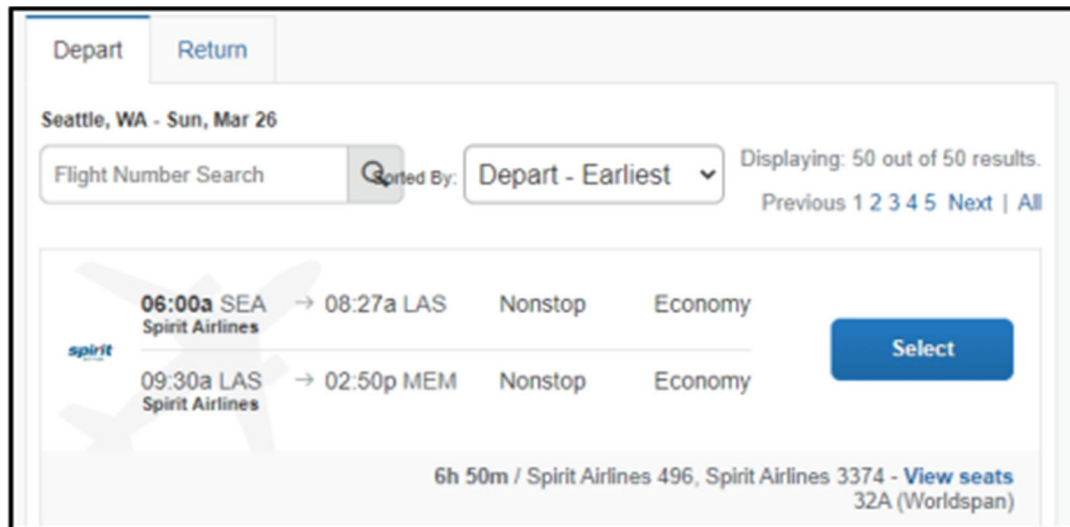
Shop by Fares Shop by Schedule

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 United 1467, 1612	1 stop ORD	9h 09m	\$620.40
	02:42p MEM → 09:19p SEA United 2228, 795	1 stop DEN	8h 37m	View Fares

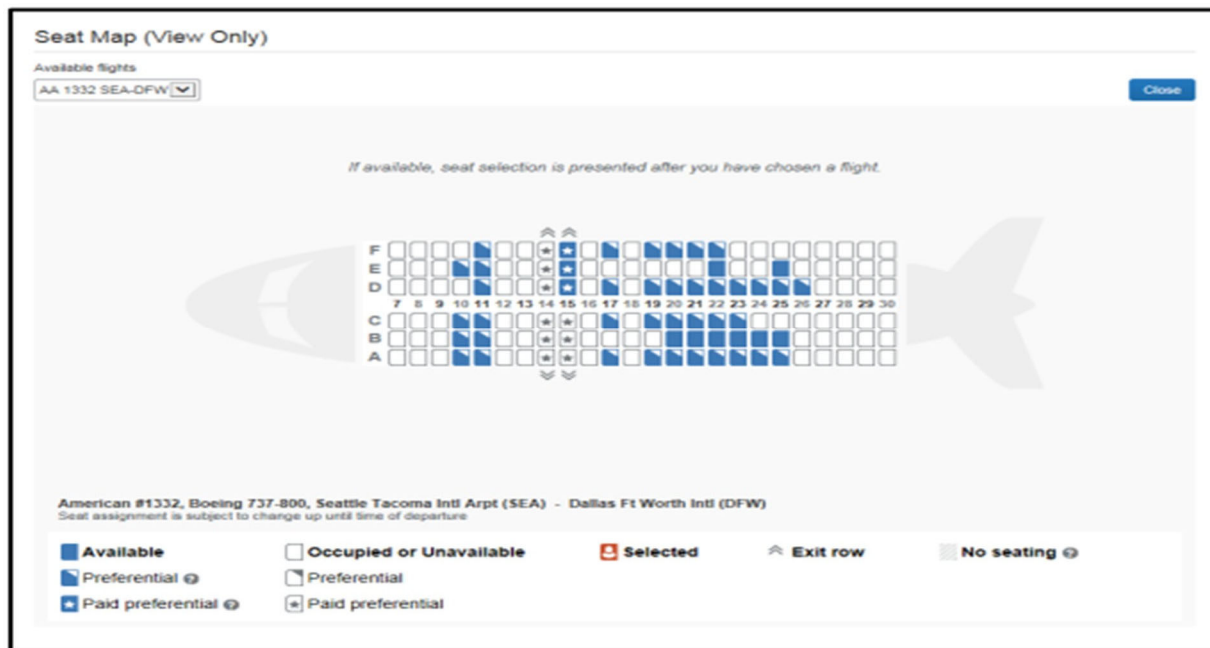
If you **Clicked** Schedule on the previous page, the **Depart** tab is initially active. **Click** the **Select** button for the flights that you want to purchase from the **Depart** and **Return** tabs.



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.

[Motor Vehicle Rental Tax Exemption Form](#)

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>I want to... Print Itinerary E-mail Itinerary</p>	<p>Trip Name: Trip from Seattle to Memphis <small>(Edit)</small></p> <p>Start Date: March 26, 2023</p> <p>End Date: March 31, 2023</p> <p>Created: March 14, 2023, William Never <small>(Modified: March 14, 2023)</small></p> <p>Description: (No Description Available) <small>(Edit)</small></p> <p>Agency Record Locator: 2BV9NZ</p> <p>Passengers: William.Nate Never</p> <p>Total Estimated Cost: \$620.40 USD <small>(Details)</small></p>	<p>Add to your Itinerary</p> <p><input type="checkbox"/> Car <input type="checkbox"/> 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 main heading is "Flight Seattle, WA (SEA) to Chicago, IL (ORD)" with a "Cancel all Air" button highlighted in a red box. Below this, it lists "United 1467". The departure is "10:55 AM" from "Seattle-Tacoma Int'l Airport (SEA)" with a duration of "4 hours, 9 minutes" and "Nonstop". The arrival is "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 shown with a "Change seat" link. Under "Additional Details", it lists "Aircraft: Boeing 737 MAX 9", "Distance: 1716 miles", "E-Ticket", "Cabin: ECONOMY (V)", and "Meal: Food for purchase". A grey bar 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

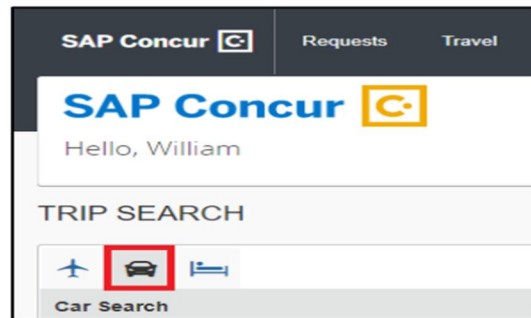
Step 7: Purchase the Ticket

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.

Please use the [Motor Vehicle Rental Tax Exemption Form](#) when renting vehicles for UHCL Travel Business purposes.

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
AVIS Most Preferred	664.58	664.58	665.85	667.12	667.12	771.67	804.82
dollar.	281.26	416.61	286.10	293.97	295.80	347.65	362.15
Hertz	602.33	607.42	609.96	406.87	419.64	493.82	512.33
Enterprise	449.30	407.73	449.70	602.67	448.72	538.45	560.89
Alamo	449.30	509.71	449.70	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,

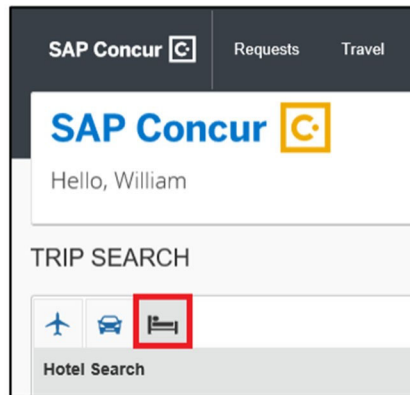
16. On the **Trip Confirmation** page, review your trip details, and then **Click** Confirm Booking. If your trip is not compliant with your company's travel policy, a **Travel Rule Triggered** window appears.

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.

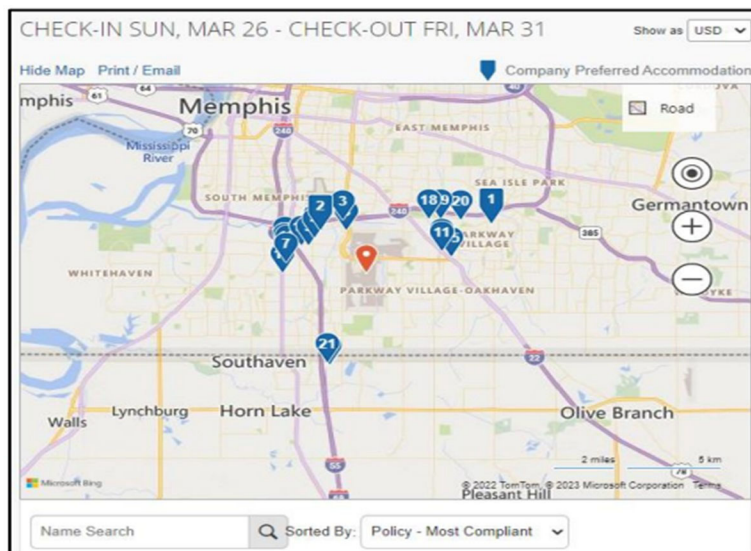
3. In the **Display Settings** area, select the appropriate check boxes.

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.



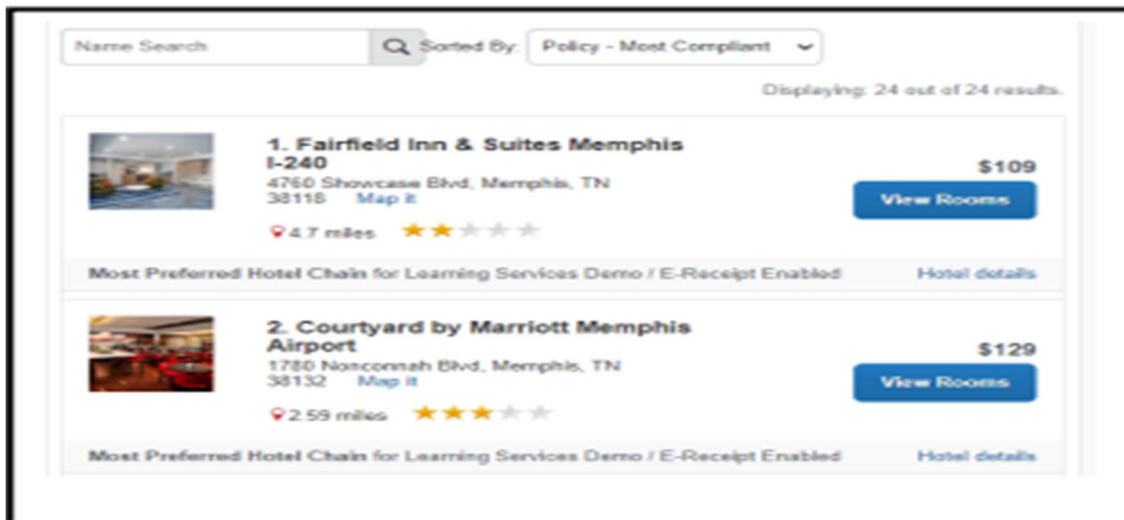
Step 4: Sort the search results (as needed)

- 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. At the top left is a small image of the hotel lobby. To its right, the hotel name and address are listed: "1. Fairfield Inn & Suites Memphis I-240, 4760 Showcase Blvd, Memphis, TN 38118". A "Map it" link is provided. Below the address, it shows "4.7 miles" and a 3-star rating. A blue button labeled "Hide Rooms" is in the top right corner, with a price of "\$109" next to it. Below this, a banner reads "Most Preferred Hotel Chain for Learning Services Demo / E-Receipt Enabled" with a "Hotel details" link. The "Room Options" section lists four room types, each with a green checkmark icon and a blue price button:

Room Option	Price
Flexible Rate Guest Room 2 Queen-s- Please cancel 1 day before arrival (Worldspan) Rules and cancellation policy	\$109
Flexible Rate Guest Room 1 King Please cancel 1 day before arrival (Worldspan) Rules and cancellation policy	\$109
Flexible Rate Guest Room 1 King Sofa Bed Please cancel 1 day before arrival (Worldspan) Rules and cancellation policy	\$114
Flexible Rate Suite 1 King Sofa Bed Please cancel 1 day before arrival (Worldspan) Rules and cancellation policy	\$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

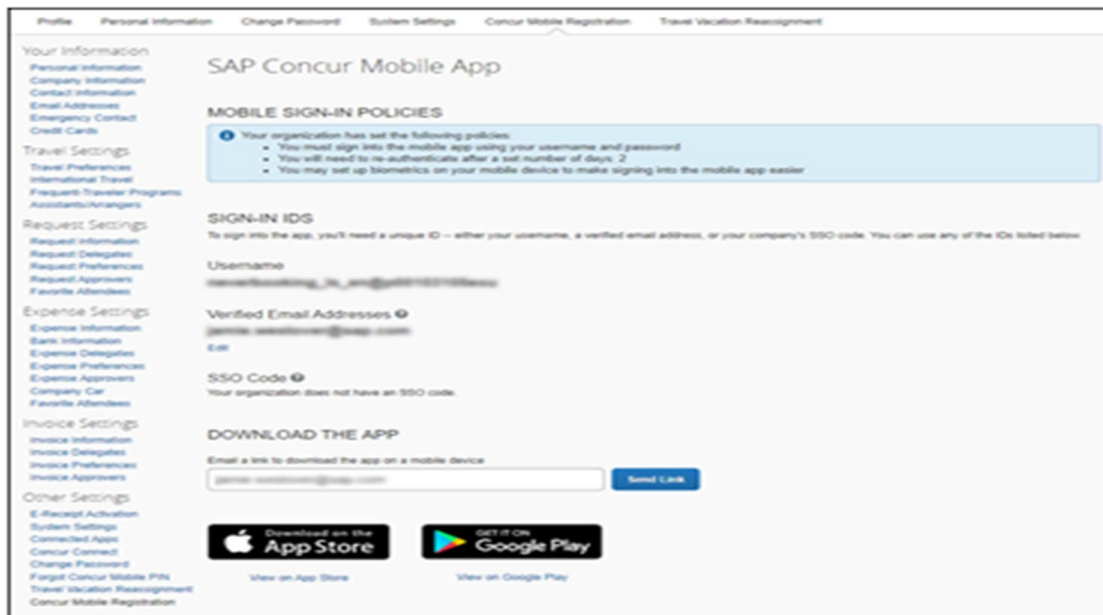
You can use SAP Concur on your mobile device to assist with your Expense, Travel, and Request needs. Because you are using your mobile device, you can access your information in a cab, in a meeting, or at the restaurant.

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

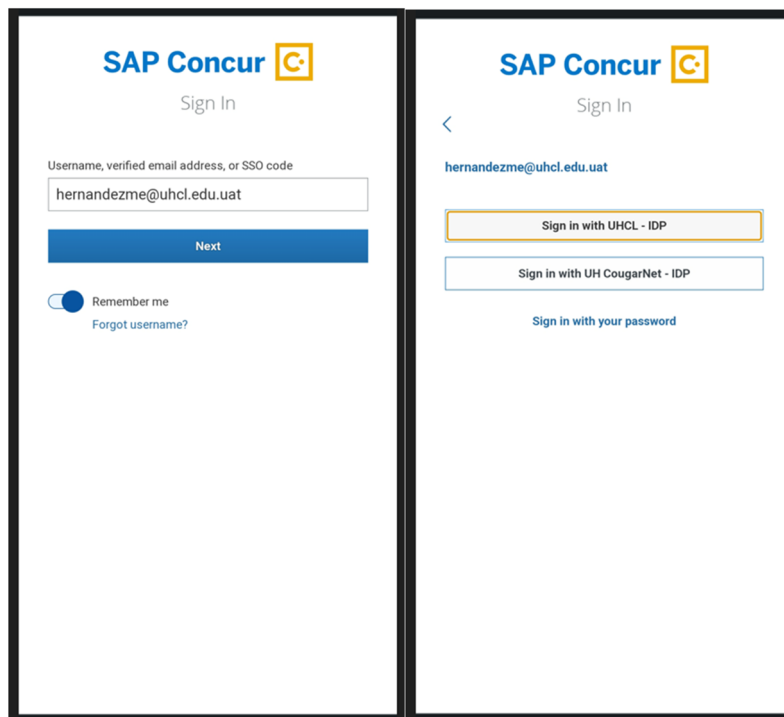


Select the Concur Mobile App from your mobile device to open.

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.

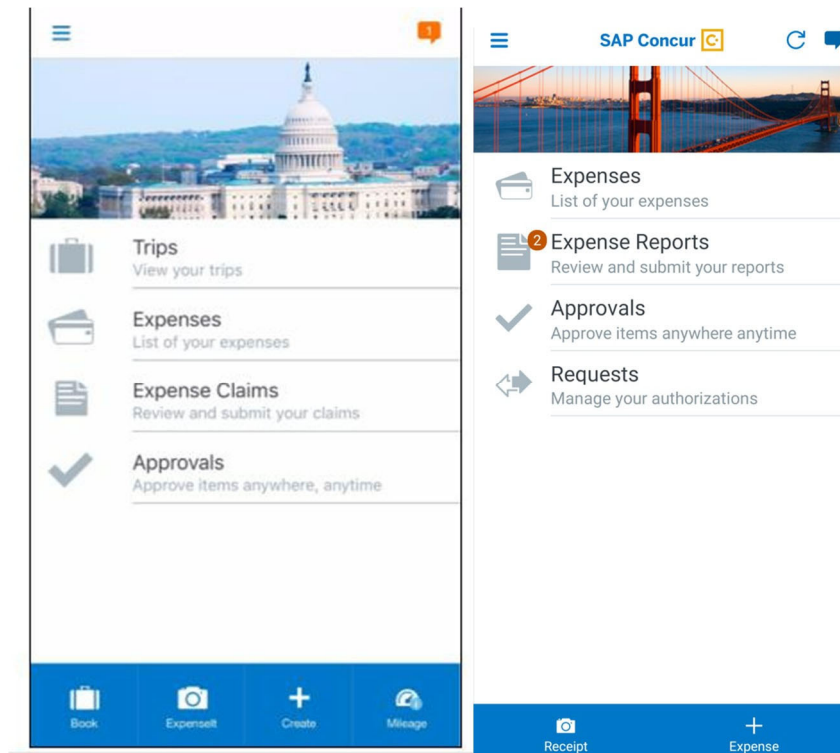
Expense Reports: A view of open expense reports and current statuses. An expense report can be completed from a mobile device.

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.

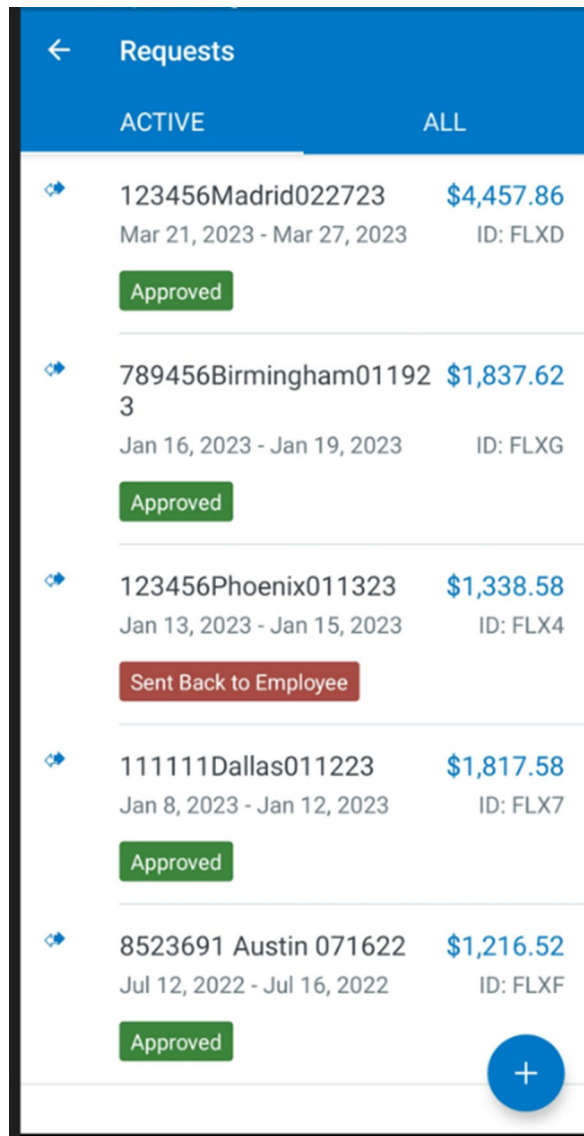


Request

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



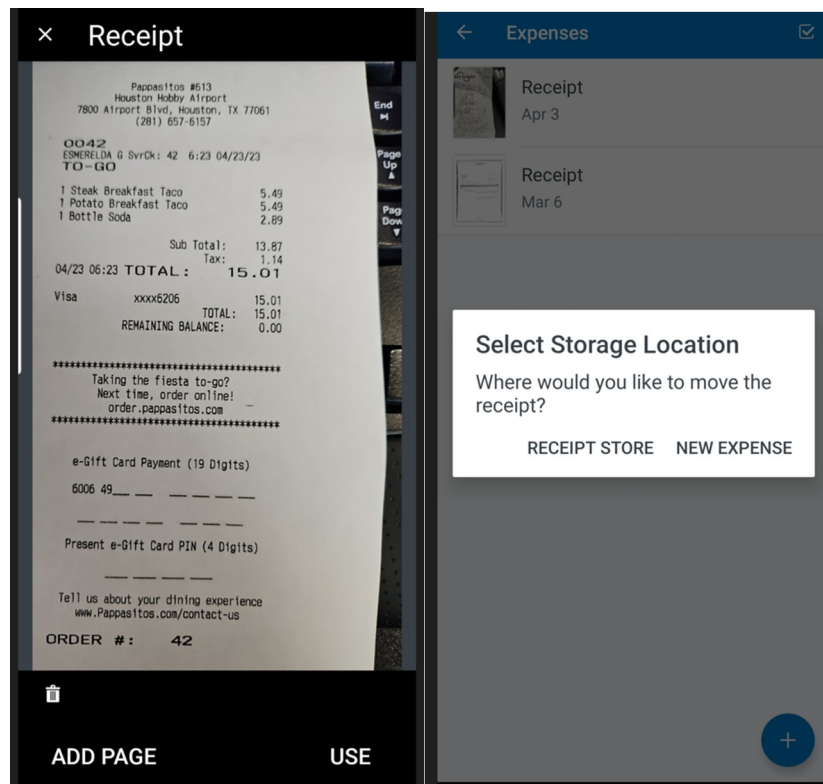
Receipts

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.



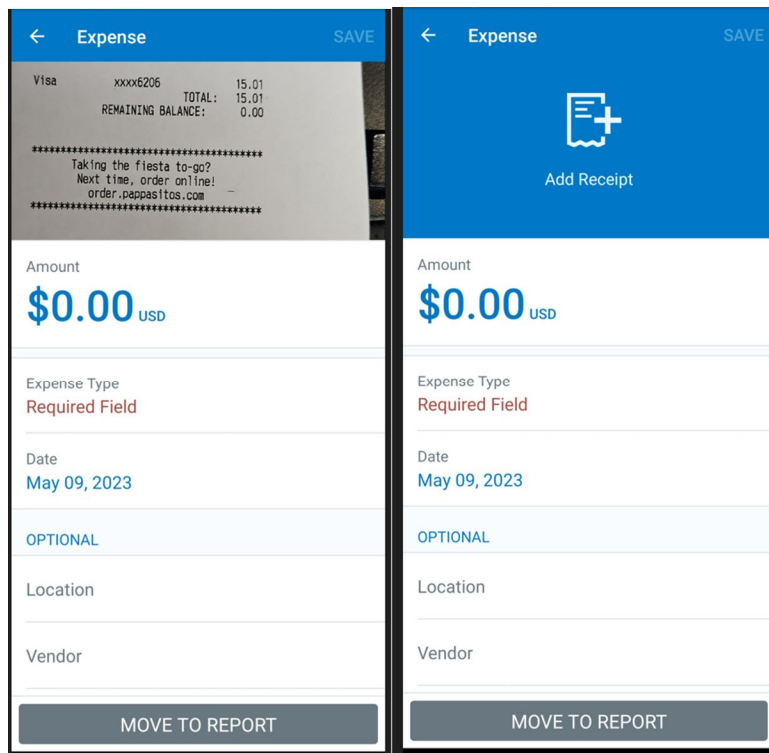
Tips for receipts:

- 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.



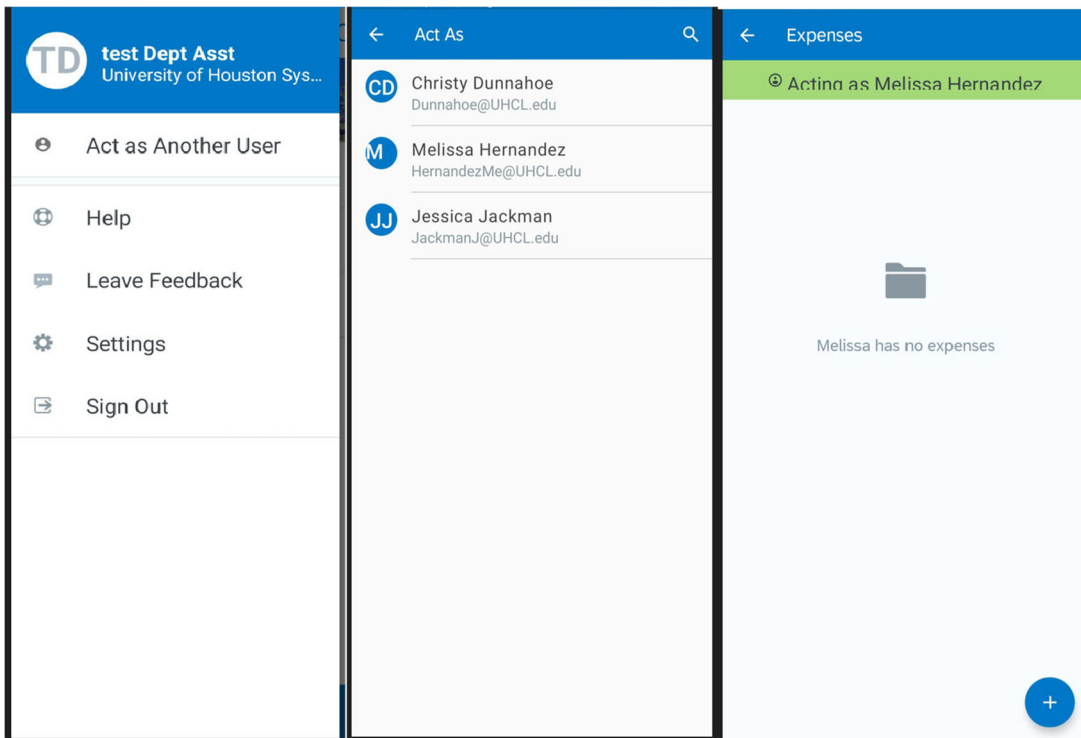
Note: For an expense to be saved to a report, an expense report must already have been created.

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

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....