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)*

<table>
<thead>
<tr>
<th>Number of Personal Days</th>
<th>List Personal Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>01/08/23</td>
</tr>
</tbody>
</table>

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

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

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

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

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

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

**Adding expected expenses**

**Click** Add. A selection of expenses will appear. **Click** on the expense type that will be added to the request.
Each expense will be an estimated expense. **Enter** the amount and any comments that may pertain to the expense. Then **Click** save.

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

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.