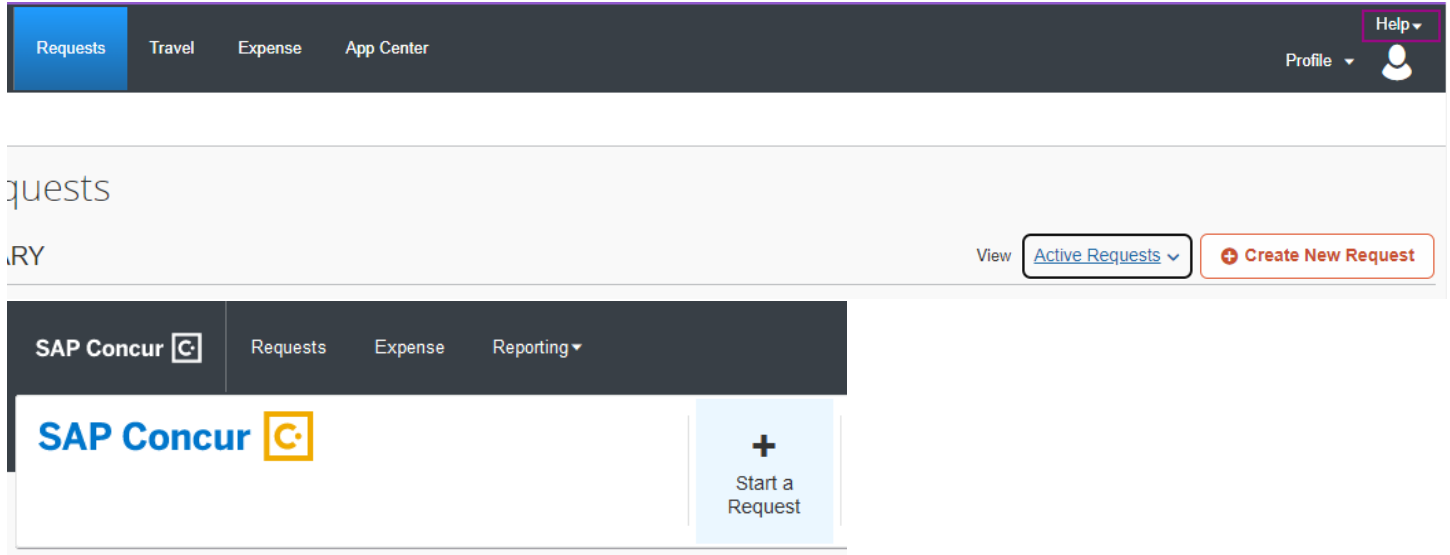


Create a Request

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.

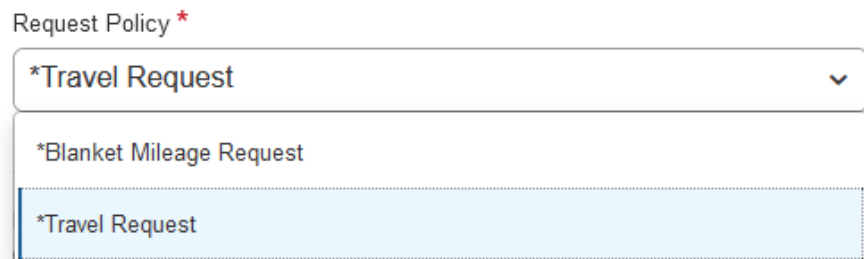


Request Policy - This Automatically defaults to the Travel Request Policy!

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.

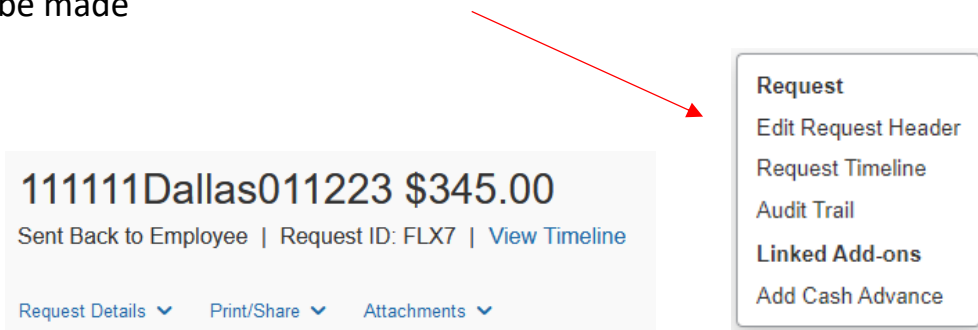
Cancel

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.

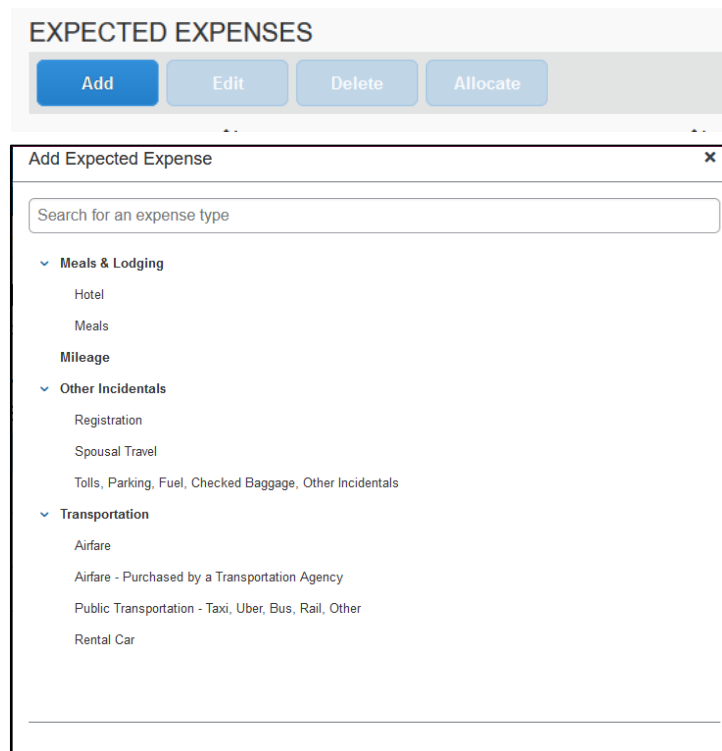
Clicking Edit Request Header will return the traveler to the request header so corrections can be made



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

Adding expected expenses

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



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

- 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.

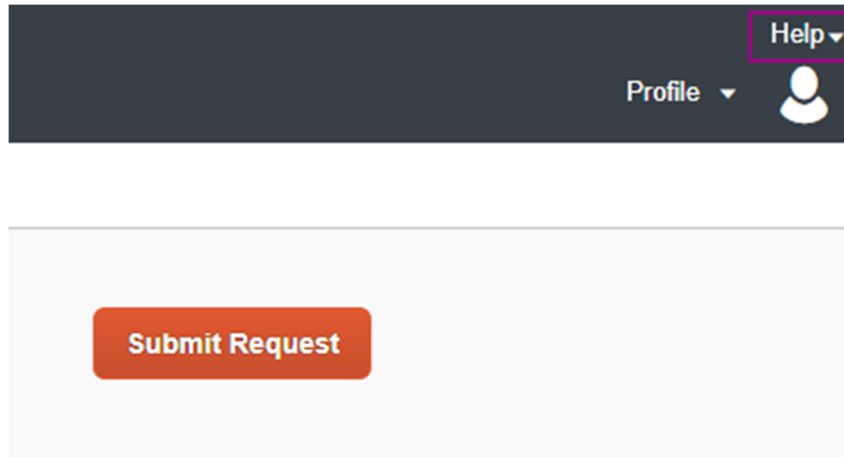
Request Details ▼ Print/Share ▼ Attachments ▼

EXPECTED EXPENSES

Attach Documents

Submit Request

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



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

