Concur Travel Training I

Inspire Higher

UHCL University of Houston Clear Lake

Overview

- **PLEASE HOLD ALL QUESTION TO THE END FOR Q&A**

- Training Overview
- Creating a Travel Request
- Expected Expenses
- Travel Card
- Common Errors
- Travel Website Resources
- Q&A

University of Houston Clear Lake

Travel Request

Expected Expenses

Travel Card

Common Errors

Q&A

Concur

UHCL University of Houston Clear Lake

Creating a Travel Request

- Request Policy
  - Travel Request
  - Blanket Request
- Document ID
  - MartinezS.Seattle110526
  - MartinezS.Blanket083126
- Travel Dates
  - Start Date & End Date
- Travel Type. Purpose of Travel, Benefit & Destination
  - Select the Travel Type and Purpose of travel
  - Detailed description of travel purpose
  - Destination City – Country – Additional Cities
- Cost Center
  - Business Unit (00759) – Department - Fund type (LOCAL)
  - Fund Code – Program – Project - Grant Type
  - Comment If needed

* Required field

Request Policy: *Test-Travel Request

Document ID *: MartinezS.Seattle110526

Traveler Type *: Employee

Travel Start Date *: 09/18/2024

Travel End Date *: 09/25/2024

Duration (Days): 8

Number of Personal Days *: 2

List Personal Days: Sept 21-22

Travel Type *: Out of State

Purpose of Travel *: Training - Conference/Seminar

Benefit * 70/500: Learning advanced teaching techniques to help students succeed at UHCL

Destination City *: Reno, Nevada

Destination Country: UNITED STATES (US)

Additional Destination Cities:

Business Unit * 1: (00759) Univ. of Houston - Cle...

Department * 2: (C0130) C0130 ACCOUNTS P...

Fund Type * 3: LOCAL

Fund Code * 4: (2064) DESIG-TUITION

Program * 5: (F0741) ACCOUNTS PAYABLE

Project * 6: NA

Grant Type * 7: NON-GRANT

Comment

Limited funds not to exceed $1,500.00

Travel Request

Expected Expenses

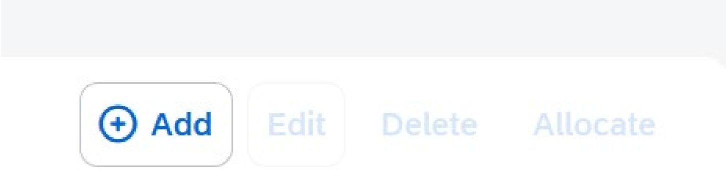
Travel Card

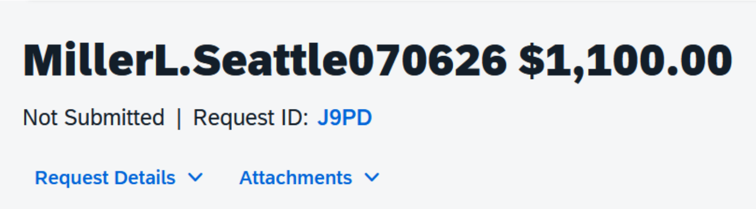
Common Errors

Q&A

Adding Expected Expenses

- Select the "+ Add"
  - The List of Expense will open
    - Hotel
    - Airfare
    - Meals – Actuals
    - Etc.
  - Select the Expected Expenses that will apply to your Travel
  - Add expected amount
  - Comment – If needed
- Supporting Documentation
  - Conference Agenda
- Foreign Travel
  - CITI Training Certificate (current)
  - Signed Export Control and Travel Embargo Form (Prior to Travel)





University of Houston Clear Lake

Travel Request

Expected Expenses

Travel Card

Common Errors

Q&A

University of Houston Clear Lake

Travel Card

- How to Obtain Travel Card
- Visit the UHCL Travel Website
- Select “Travel Card Packet” (DocuSign)
- This will need the following signatures
  - Department Supervisor/Head
  - College/Department Administrator (CBA/DBA)
  - Process can take up to two weeks to complete
- Travel card use
  - All Travel Expenses including Registration and meals
  - All Expense Receipts are required Except for meals unless it over the GSA daily rate

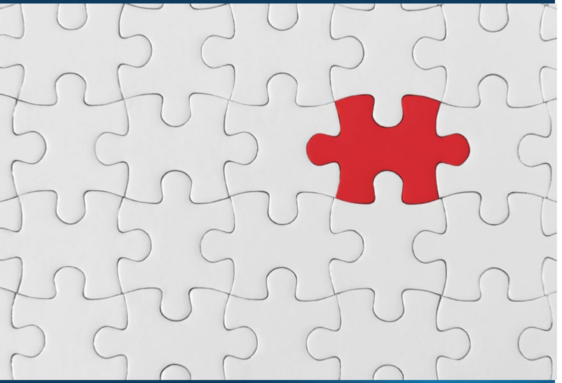
Travel Request

Expected Expenses

Travel Card

Common Errors

Q&A



Common Errors

- Request Header showing “UH Request Policy”
- Document ID (new format as of 09/1/2025)
- Travel End date and Document ID date do not match
- Conference Agenda not uploaded
- CITI Certificate and Embargo form (foreign travel only)
- Approval Path needs to be updated
- Request amount over the approved budgeted amount
- Specify If its Blanket Travel and Travel Request

Travel Request

Expected Expenses

Travel Card

Common Errors

Q&A

University of Houston Clear Lake

Travel Website

- Travel Policy
- Travel Card Packet (Travel Card)
- Concur Self – Registration
- Travel Guidelines
- UHCL Concur instructions
- Forms
- https://www.uhcl.edu/about/administrative-offices/travel/

Q&A

Travel Office Resources

- https://www.uhcl.edu/about/administrative-offices/travel/
- 281-283-2270
- concurtravel@uhcl.edu
- Hands-On Training offered during Hawk Power Hour.
- Office Hours: Monday-Friday, 8:00am-5:00pm