

Concur Travel Training II

Inspire Higher



Overview

- PLEASE HOLD ALL QUESTION TILL THE END FOR Q & A
 - Creating a Travel Expense Report
 - Adding Expenses
 - Travel Card
 - Common Errors
 - Travel Website, Resources and Non-Employee Travel (Candidates & Students)
 - Travel Office Contact Information
 - Q & A

Creating a Travel Expense Report & Itinerary

Adding Expenses

Adding Travel Card Expenses & Supporting Documentation

Travel Card

Common Errors

Travel Website Resources

Travel Office Contact Information

Q&A

UHCL University of Houston
Clear Lake

Creating a Travel Expense Report

➤ Create from the Approved Request

- Create Expense Report

➤ Create Travel Itinerary

- Travel Allowance
- Manage Travel Allowance
- Create New Itinerary
- Departing City – Date – Time
- (Houston 091125 6:00am)
- Arrival City – Date – Time
- (Seattle 091125 9:00am)
- Click Save to enter your Return
- Departing City – Date – Time
- (Seattle 091525 1:00pm)
- Arrival City – Date – Time
- (Houston 091525 5:00pm)
- Click “Save” – Click “Next” – Click “Done”

KnightL.Seattle091525 \$720.00

Approved | Request ID: JL79

Request Details ▾

Attachments ▾

EXPECTED EXPENSES

Report Details ▾

Print/Share ▾

Manage Receipts ▾

Travel Allowance ▾

Expenses

Manage Travel Allowance

1 Create New Itinerary 2 Available Itineraries

Itinerary Info

Itinerary Name: KnightL.Seattle091525 Selection: USGSA-UHCL ▾

Add Stop Delete Rows Import Itinerary

☐ Departure City ¹	Arrival City	Arrival Rate Location
No Itinerary Rows Found		

New Itinerary Stop

Departure City: Houston, Texas

Date: 09/11/2025 Time: 7:00 AM

Arrival City: Seattle, Washington

Date: 09/11/2025 Save

Departure City

Seattle, Washington

Date 09/15/2025 **Time** 1:00 PM

Arrival City

Houston, Texas

Date 09/15/2025 **Time** 5:00 PM

Save

Next >> Cancel

<< Previous Done

Creating a Travel Expense Report & Itinerary

Adding Expenses

Adding Travel Card Expenses & Supporting Documentation

Travel Card

Common Errors

Travel Website Resources

Travel Office Contact

Q&A

UHCL University of Houston
Clear Lake

Click the “+ Add”

Manually Create Expense

Select the Expense Type

- Hotel
- Airfare
- Meals – Actuals
- Mileage Reimbursement

❖ **Use the Mileage Calculator**

- Fill in all Required Fields*
- Itemize Hotel Rate, Tax and Meal Tips
- Add a Comment– *If needed*
- Allocate – *If needed*
- **Attach Receipt**

Expense Type *	
Airfare	
Traveler Type *	Travel Type *
Employee	Out of State
Transaction Date *	Vendor *
08/01/2025	Southwest Airlines
City of Purchase	Ticket Number
Houston, Texas	12042007
Payment Type *	
Paid by Traveler	
Amount *	Currency *
256.00	US, Dollar (USD)

Adding Expenses

KnightL.Seattle091525 \$0.00

Not Submitted (Report Number: D3XHTS)

REQUEST

Approved
\$720.00

Report Details

Print/Share

Manage Receipts

Travel Allowance

Expenses

+ Add Expense

Scan Receipt

Manually Create Expense

Select from Available Expenses (0)

Details	Itemizations
Mileage Calculator	
Expense Type *	
Mileage Reimbursement	

Mileage Calculator

Start address: Area Blvd, Houston, TX 77058, USA

End address: E Market St, San Antonio, TX 78205

Calculate Route

Map

Directions

1. Head east 89 ft

2. Turn right toward Bayou Rd E 218 ft

3. Turn right onto Bayou Rd E 0.2 mi

4. Turn left onto University Dr 0.4 mi

5. Continue onto Krueger Way 0.2 mi

6. Turn left onto Falcon Pass 0.5 mi

7. Turn right onto Space Center Blvd 2.1 mi

8. Turn left onto Clear Lake City Blvd 2.2 mi

TOTAL PERSONAL: 0.0 MI

TOTAL BUSINESS: 224.1 MI

Airfare \$256.00

09/01/2025 | Southwest Airlines

Details Itemizations

Allocate

Expense Type *

Airfare

Percent	Amount
Amount	Allocated \$256.00
\$256.00	100%
Default Allocation	
Code	
UHCL-Out of State-00759-C0130-LOCAL-2064	
Allocations (0)	
Add Allocation	
+ New Allocation	
★ Favorite Allocations	
Expense Group	
UHCL	
Travel Type	
Out of State	
Business Unit *	
(00759) Univ of Houston - Clear Lake	
Department *	
Save	
Cancel	

Mileage Reimbursement
Tolls, Parking, Fuel, Checked Baggage, Other Incidentals
Airfare
Public Transportation - Taxi, Uber, Bus, Rail, Other
Meals & Lodging
Hotel
Mileage

Percent %
50
5
Save
Cancel

Creating a Travel Expense
Report & Itinerary

Adding Expenses

Adding Travel Card Expenses &
Supporting Documentation

Travel Card

Common Errors

Travel Website Resources

Travel Office Contact

Q&A

Adding Travel Card Expenses & Supporting Documentation

➤ Travel Card Charges

- Available Expenses
- Select – Move to Report
- Add the Expense Type if it says “Undefined”
- Add the Itemized Receipt

Available Expenses

Drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.

View: All Expenses ▾

Upload Receipt New Edit Delete Combine Expenses Move ▾

	Receipt	Payment Type↑↓	Expense Source	Expense Type↑↓	Vendor Details↑↓	Date↓↑	New Report
☒		Citi Bank	Corporate Card	Undefined Public Transportation	UBER TRIP	08/04/2025	102292Blanket083125
☒		Citi Bank	Corporate Card	Undefined Hotel	HAMPTON INNS	08/04/2025	\$99.45 ...
☒		Citi Bank	Corporate Card	Undefined Public Transportation	UBER TRIP	08/04/2025	\$32.97 ...

➤ Supporting Documentation

- Attach **All** itemized receipts except for Meals
- Meal Receipts will be required **if** the GSA Daily Allowable Limit **is** exceeded

Creating a Travel Expense
Report & Itinerary

Adding Expenses

Adding Travel Card Expenses &
Supporting Documentation

Travel Card

Common Errors

Travel Website Resources

Travel Office Contact

Q&A

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 **Business** Travel Expenses including Registration and Meals
 - All Expense Receipts are required Except for meals, unless the GSA Daily Allowable limit is exceeded

Creating a Travel Expense
Report & Itinerary

Adding Expenses

Adding Travel Card Expenses &
Supporting Documentation

Travel Card

Common Errors

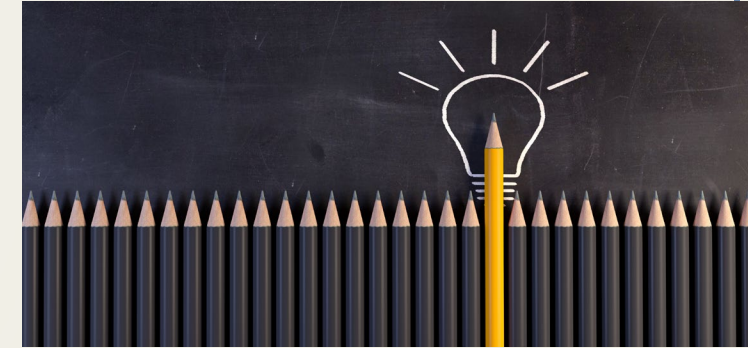
Travel Website Resources

Travel Office Contact

Q&A

Common Errors

- ▶ Not creating from an Approved Request
- ▶ Not creating the Travel Allowance Itinerary
- ▶ Not separating Meals-Actuals by date
- ▶ Not staying under 20% when tipping
- ▶ Not using the Mileage Calculator
- ▶ Not applying **ALL Travel Card Charges and Credits** to Expense Report
- ▶ Not attaching receipts – except for meals
- ▶ Not itemizing Hotel Tax and Tips
- ▶ Using a Personal card and a Travel card to purchase meals
- ▶ Exceeding Limited Funds
- ▶ Blanket Mileage – Not separating dates of Travel
- ▶ Submitting 60 days after the last date of Travel without the ***signed*** Exhibit B Form and Exception Form



Creating a Travel Expense
Report & Itinerary

Adding Expenses

Adding Travel Card Expenses &
Supporting Documentation

Travel Card

Common Errors

Travel Website Resources

Travel Office Contact

Q&A

Travel Website Resources

- Travel Policy
- Travel Card Packet (Travel Card)
- Travel Card Quick Tips
- Concur Self – Registration
- Travel Guidelines
- UHCL Concur instructions
- Forms for:
 - Foreign Travel
 - Candidate Travel (***Contact the Travel Office for additional information***)
 - Student Travel (***Contact the Travel Office for additional information***)
 - Exhibit B (If submitting 60 days after the last date of Travel)
 - Exception Form
- <https://www.uhcl.edu/about/administrative-offices/travel/>



Travel Office Contact Information

- concurtravel@uhcl.edu
- 281-283-2170
- Office Hours: Monday–Friday, 8:00am–5:00pm



Q & A

