Concur Travel Training II

Inspire Higher

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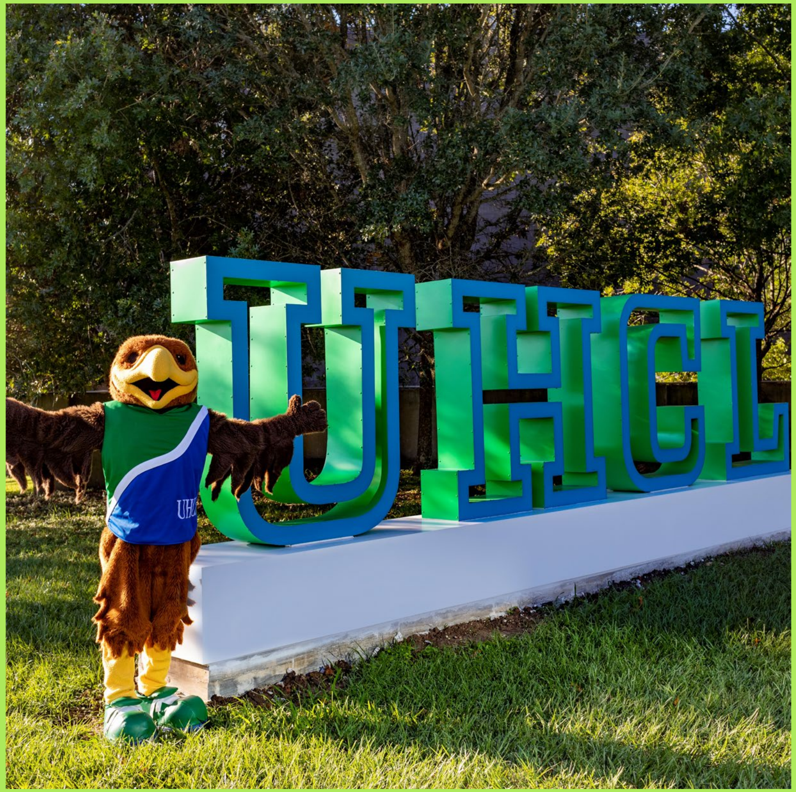

Overview

- 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

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Concur

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

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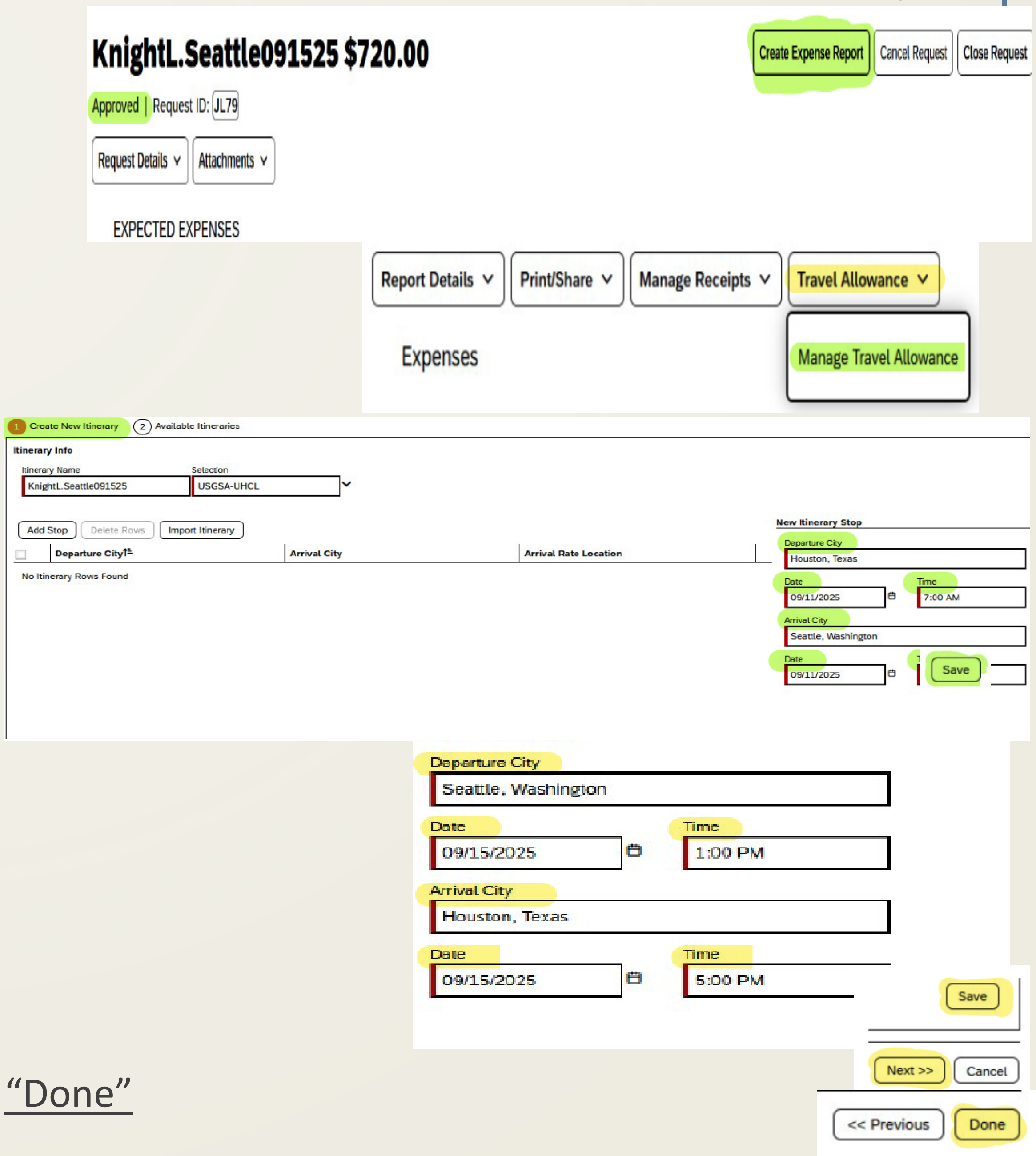
Creating a Travel Expense Report

- ***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"



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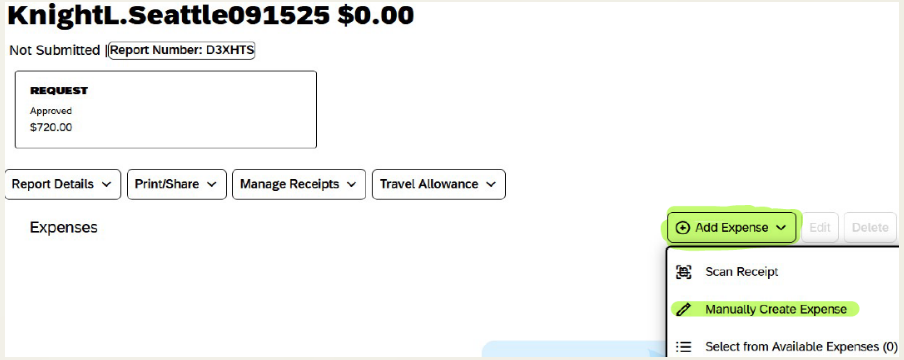
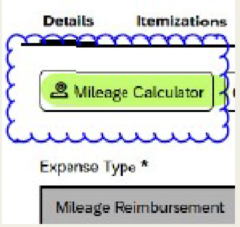
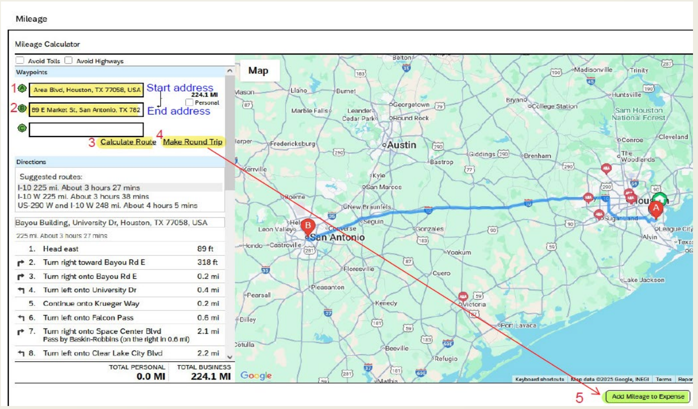
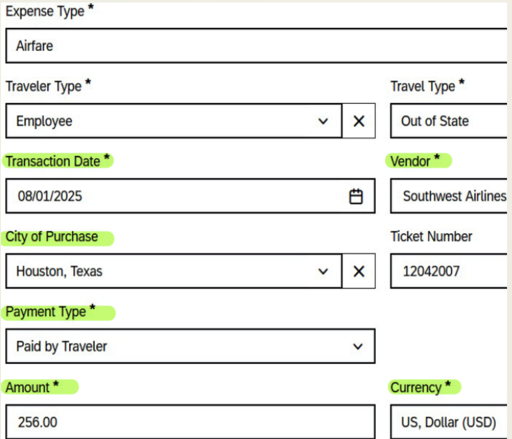
Adding Expenses

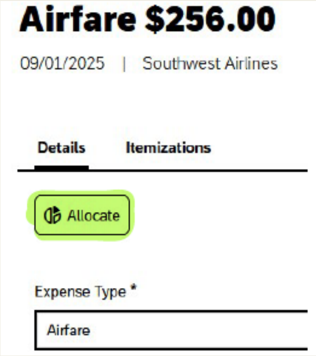
- ***Click the "+ Add"***
- Manually Create Expense
- Select the Expense Type
  - Hotel
  - Airfare
  - Meals – Actuals
  - Mileage Reimbursement
    - **Use the Mileage Calculator**
- Fill in all Required Fields*
- Itemize Hotel Rate, Tax and Meal Tips
- Add a Comment– *If needed*
- Allocate – *If needed*
- **Attach Receipt**

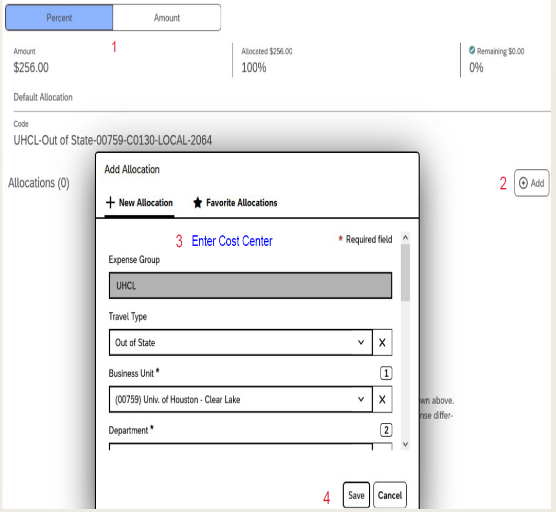


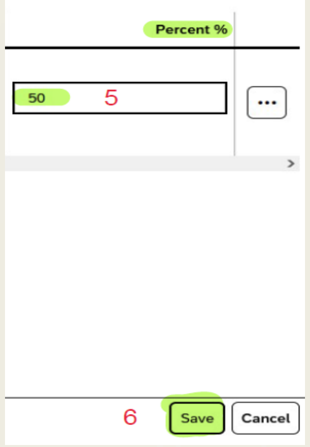












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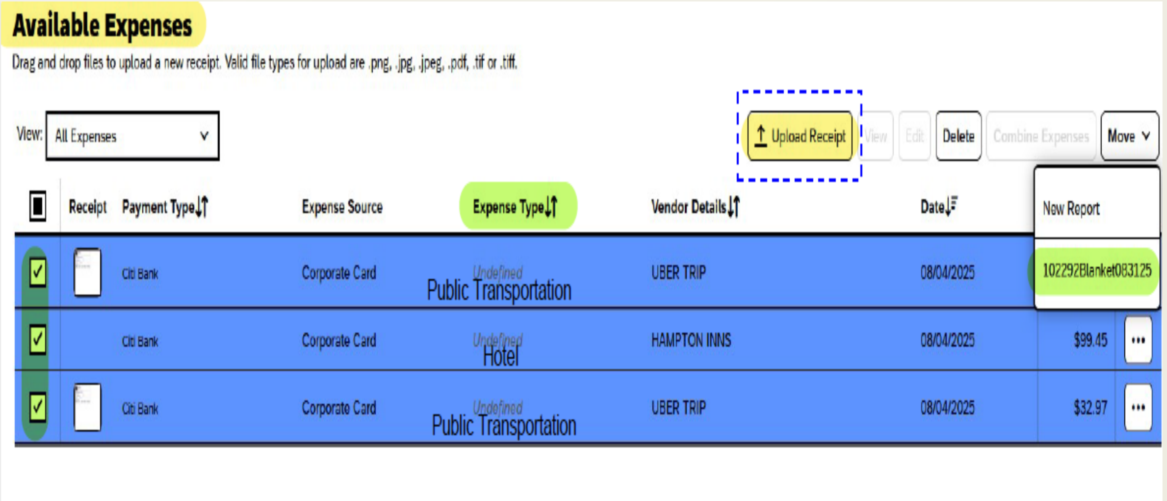
Adding Travel Card Expenses & Supporting Documentation

- ***Travel Card Charges***
  - Available Expenses
  - Select – Move to Report
  - Add the Expense Type if it says "Undefined"
  - Add the Itemized Receipt



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

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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

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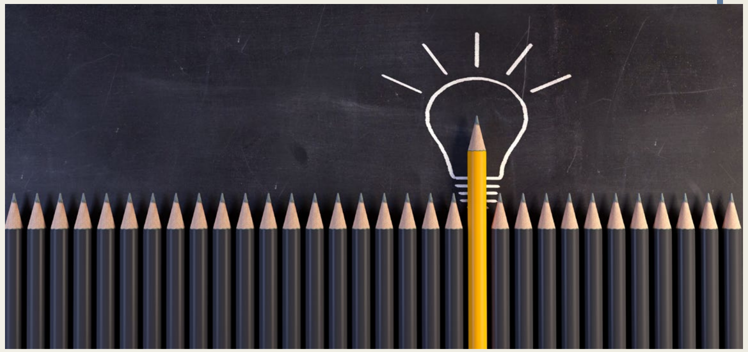
Common Errors



- 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

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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