

# UNIVERSITY OF SOUTH ALABAMA

### FLAGSHIP OF THE GULF COAST.

## Concur Travel Expense Report Manual

**Procurement Card and Travel Services** 

650 Clinic Drive Suite 1400 | Mobile, Alabama | 36688 | 251.460.6242 pcardandtravelsvcs@southalabama.edu



Rev 10.21.24

Note: If you are creating an expense report for local mileage please see the "Local Mileage Expense Report" manual.

**1.** Log into Concur and click Create then select Start a Report.



2. Click Create from an Approved Request. You will get a pop up asking if you are sure you want to continue, click "Create From an Approved Request" button.

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### **3.** Select the appropriate approved request and click **Create Report**.

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О	Concur Fusion 2020	4MA3	03/09/2020	03/13/2020	No	\$3,000.00	\$3,000.00	\$3,000.00
С	Concur Fusion 2019	3YL6	03/11/2019	03/15/2019	No	\$3,000.00	\$3,000.00	\$478.96
С	Concur Fusion - 2018	ЗМЭК	03/13/2018	03/16/2018	No	\$2,995.00	\$2,995.00	\$323.61
0	Montgomery	334Y	05/09/2016	05/09/2016	No	\$195.93	\$195.93	\$184.68

**4**. Once your report has been created you will have Alerts. Click **Report Details – Report Header**. Complete all missing required fields as indicated by the red highlights then click **Save**.

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5. To add an expense click Add Expense.

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**6.** If you have a PCard or participate in e-receipts, then your charges will show under "Available Expenses". If any of these charges are applicable to this report, then select the applicable charges and click **Add To Report**. If there are <u>not</u> any charges under your Available Expenses tab you need to attach to this report, then select the tab **New Expense**.

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Taxi, Uber, Lyft, etc.		

7. In the searchable field begin typing the expense type you wish to add. Then select the expense type you wish to add to your report and **Click it in the list**.

Add Expense to Report	Construction Could	
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**8.** Complete all the required fields (*required fields marked with red asterisks*) and attach the receipt. To attach a receipt click **Add Receipt**.

Details Itemizations			Receipt
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Cash/Personal Card			Click to upload or drag and drop files to upload a new receipt. Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.
Amount *	Currency *		SMB limit per file.
950.00	US, Dollar (USD)	× •	Add Receipt
Request *			
03/14/2022. \$1,500.00 - Concur Fusion 2022 - Orlando			
Comment		0/500	
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**9.** Once you click **Add Receipt**, you can select a receipt that you have loaded into your Concur account or select **Upload New Receipt** and upload the receipt from your computer or other location.



**10.** After you have attached your receipt, you will see your receipt image along with your expense details. If you are finished with this expense click **Save Expense** upper right or lower left.

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**11.** After you have clicked **Save Expense**, you will be back to your entire report where you can add more expenses or adjust those you have already added. To add more expenses repeat steps 5-10 for each additional expense.

**12.** After you have added all applicable expenses and you are ready to submit, click **Submit Report**.

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NOTE: The following steps, 13-18, are applicable to Allocations. If you do not have any allocations, then you do not need to complete these steps.

**13.** To allocate an expense click the expense you wish to allocate and click the **Allocate** link directly below the word Details. *Hint: You can also check the box next to the expense on your report and click the Allocate button.* 

Hotel \$950.00     Marriott Hotels				Save Expense Delete Expense Cancel
				Hide Receipt
Details Itemizations				Receipt
@ Allocate			* Required field	≡ 28F4CS14807376_ 1 / 1 - 00% + E &
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Transaction Date *		Additional information		HARRIGHT WARROTTS OILANDO WOILD CENTER ON TO TO THE
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Hint:

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14. Select whether you wish to allocate by Percent (default) or by Amount then click Add.

Amount \$950.00	Allocated \$950.00	
		Remaining 80.00 0%6
Default Allocation	Funding	Purcere Is
17-172000-172800-110000-4600	source from the header	100
Allocations (0)		Add East East Eavy to Events

**15.** Complete the required fields and click **Save** or select from your Favorite Allocations tab (see Saving an Allocation as a Favorite at the bottom of this page).

	* Required f	ield	1
Division *		1	
(13) Development and Alumni Relations	×	~	
Division 2 *		2	
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Org *		3	1
(130000) Office of VP Development & Alumni	×	~	
Fund *		4	
(110000) University	×	*	•

**16.** Key the percentage or amount you wish to apply to this funding source.

	Percent	Amount							
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	Division 1					Activity <b>↓</b> †	Code†±	50	

**17.** If you need to add more funding sources repeat steps 14-16 for each new funding source.

**18.** After all funding sources are added click **Save**. Then click **Save Expense**. You will see "Allocated" under the Requested amount.

Receipt↓↑ Payment Type↓↑	Expense Type↓↑	Vendor Details↓↑	Date↓₹	Requested↓↑
Cash/Personal Card	Hotel	Marriott Hotels Orlando, Florida	03/18/2022	\$950.00 Allocated
				\$950.00

### SAVING AN ALLOCATION AS A FAVORITE

After entering your desired funding sources into the allocation in step 16 you can click **Save as Favorite** give it a name and save. It will then be available under the **Favorite Allocations** tab the next time you need to allocate to the same funding source(s) as the favorite you saved.