

UNIVERSITY OF SOUTH ALABAMA

FLAGSHIP OF THE GULF COAST.

Concur Travel Request Manual

Procurement Card and Travel Services

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Rev 10.21.24

1. Log into Concur and click Create and select Start a Request.



2. Complete all required fields as indicated by the red asterisk next to the field name then click **Create Request**.

Create New Request					>
Request/Trip Name*		Request/Trip Start Date *		Request/Rep Emit Date *	* Required field
Ortando		10/28/2024	8	11/01/2024	8
Request/Trip Purpose "		Conference/Event Name		tip 5,p+ *	
Conference	¥.			Out-of-State	~
Destitution City *		Main Destination Country			
Orlando, Florida	× •	UNITED STATES (US)			
Dwision *	-1	Division 2 *		Org."	
(17) Finance and Administration	× ×	(172000) University Accounting/Controller	× ~	(172800) PCard and Travel Services	× ~
Fund *	4	Frogram *	5	Actively	
(110000) University	× •	(4600) Institutional Support	× ×		v
Additional Information	0/64	Who will cover teaching and etmin studies? List courses covered.			
An and the Annual An		ο		A	Create Request

3. Click Add.

Orlando	Submit Request Copy Request Deinte Request
Not Submitted (Request ID: 97DR	
Request Details V Print/Share V Attachments V	
EXPECTED EXPENSES	O And a second s
C	

4. Select your expected expense and complete the required fields as indicated by the red asterisk next to the field name and click **Save**.

New Expense: I	notet Rese	rvation			Save Cancel
					* Required fiel
heck-In					
ate-		Az.		Dity *	
MM/DD/YYYY	8	hh:mm A	0	Orlando, Florida	× •
ecal *					
Hilton					
heck-Out					
ate		Az			
MM/DD/YYYY	e	hh:mm A	0		
omment			6/2000		
mount *		Currancy *			
1,300.00		US. Dollar	~		
4					
Save					

5. Once you click **Save** you will see the expected expense added to your request. Follow steps 3 & 4 for each expected expense until you have added all of your expected expenses added to your request.

Orland	o \$1,300.00		Submit Request Copy Request Delete Reque
lot Submitted	Request ID: 97DR		
Request Details	Print/Share Attachments		
EXPECTED	EXPENSES		(Add Edit Delete Allocate
Expe	ense type ↓ ↑	Details↓↑	Date↓₹ Amount↓† Requested↓†
Hotel	l Reservation	Orlando, Florida	10/21/2024 \$1,300.00 \$1,300.00
			\$1,300.00

6. After you have added all of your expected expenses click Submit Request.

Orla	ndo \$1,300.00		Submit Request Copy Request Delete Request
lot Subm	nitted Request ID: 97DR		
Request [Details V Print/Share V Attachments V		
EXPEC	CTED EXPENSES		Add Edit Delete Allocate
	Expense type↓↑	Details↓↑	Date↓∓ Amount↓∱ Requested↓∱
	Hotel Reservation	Orlando, Florida	10/21/2024 \$1,300.00 \$1,300.00
			\$1,300.00

NOTE: If you need to allocate any expense to funding sources other than the one you entered on the header (the first screen when you created the request), then follow steps 7-10. The following steps, 7-10, are applicable to Allocations only. If you do not have any allocations, then you do not need to complete these steps.

7. To allocate an expected expense select the expense the click Allocate.

Orlando \$1,300.00		Submit Request Copy Request Delete Request
Not Submitted Request ID: 97DR		
Request Details V Print/Share V Attachments V		
EXPECTED EXPENSES		(Add Edit Delete Allocate
✓ Expense type↓↑	Details↓↑	Date↓ [∓] Amount↓↑ Requested↓↑
Hotel Reservation	Orlando, Florida	10/21/2024 \$1,300.00 \$1,300.00
		\$1,300.00

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

Allocate				×
Expenses: 1 \$1,300.00				
Percent	Amount			
\$1,300.00 Default Allocation		Allocated \$1,300.00 100%6	© Remaining \$5.00 096	
Code 17-172000-172800-110000-4600				Present %
Allocations (0)			(Add Line	Jacob Same

9. 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).

+ New Allocation * Favorite Allocations		
	* Required	field -
Division *		1
(20) Student Affairs	×	~
Division 2.*		2
(210000) Dean of Student Affairs	×	~
Org *		3
(210100) Student Affairs Deans Office	×	~
Fund *		4
(110000) University	X	v *

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

	Percent	Amount							
mount 51,300 Nefault	0.00 Allocation		Allocated \$1.80.00 100%				© Remaining \$0.00 0%		
xder 7-172	2000-172800-110000-4600								Percent
Alloc	ations (2)						(@Add	Erre Palman	Save as Favorite
0	Division17	Division 211	Org11	FundIt	Program.17	Activity11	Code†i		Percent
	Finance and Administration	University Accounting/Controller	PCard and Travel Services	University	Institutional Support		17-172000-172800-110000-4600	50	

11. If you need to add more funding sources repeat steps 9-11 for each new funding source.

12. After all funding sources are added click Save. You will see "Allocated" under the Requested amount.

	Expense type↓↑	Details↓↑	Date↓⁼	Amount↓↑	Requested↓↑
0	Hotel Reservation	Orlando, Florida	10/21/2024	\$1,300.00	\$1,300.00
U	Hotel Reservation	Onando, Florida			Allocated

SAVING AN ALLOCATION AS A FAVORITE

After entering your desired funding sources into the allocation in step 11, 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.