

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/Trip Emit Date *	* Required field
Ortando		10/28/2024	8	11/01/2024	8
Request/Trip Purpose **		Conference/Event Name		the Stee .	
Conference	¥.			Out-of-State	~
Destitution City *		Main Destination Country			
Orlando, Florida	× •	UNITED STATES (US)			
Dwision *	1	Division 2 *	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
Addional Information	0/64	Who will cover teaching and whim studies? List courses covered.			
An and the Annual An		, T. (11) (11) (11)		A	Create Request

3. Click Add.

Orlando	Submit Request Copy Request Delate Request
Not Submitted (Request ID: 97DR	
Request Details 🛩 Print/Share 🛩 Attachments 🛩	
EXPECTED EXPENSES	() Add () () () () () () () () () () () () ()
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:	Hotel Reser	rvation			Save Cancel
					* Required field
Check-In					
() ate		42		City *	
MM/DD/YYYY	8	hh:mm A	0	Orlando, Florida	× ~
Detail *					
Hilton					
Check-Out					
Date		At			
MM/DD/YYYY	÷	hh:mm A	0		
Comment			0/2000		
-					
Amount *		Currancy *			
1.300.00		US. Dollar	~		
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.

Orla	ndo \$1,300.00		Submit Request Copy Request Delete Request
Not Subm	itted Request ID: 97DR		
Request [Details V Print/Share V Attachments V		
EXPEC	CTED EXPENSES		(Add Edit Determ Allocare
	Expense type↓↑	Details↓↑	Date↓ [∓] Amount↓↑ Requested↓↑
	Hotel 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
Not Subm	nitted Request ID: 97DR				
Request I	Details 🗸 Print/Share 🗸 Attachments 🗸				
EXPE	CTED EXPENSES		(Add	Edit Dei	ese Allocate
0	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				Percent %
Allocations (0)			() Add La	preserve distanting

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		
	* Required	field -
Division *		1
(20) Student Affairs	×	~
Division 2.*		2
(210000) Dean of Student Affairs	x	~
Org *		3
(210100) Student Affairs Deans Office	×	~
Fund *		4
(110000) University	x	~ .

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

1 \$1,300.00									×
Parcent	Amount								
00 location		Allocated \$1.80.00 100%				© Remaining \$0.00 0%			
00-172800-110000-4600									Percent
tions (2)							⊙ Add	prin / Pairman	Save as Favorite
Division 17	Division 211	Orgif	FundIt	Program11	Activity11	Code†i			Percent
Finance and Administration	University Accounting/Controller	PCard and Travel Services	University	Institutional Support		17-172000-172800-110000-4600		50	
Student Attains	Dean of Student Atlairs	Student Atlains Deans Office	University	Student Services		20-210000-210100-110000-4500		50	
	1 \$1.300.00 Precent 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	st.300.00 Precent Amount O	1 \$1.00.00 Percent Annual Annual Annual Dears of Student Afters Dears of Stude	I 51.30.00 Precent Amound 0 0 100% 00-172800-110000-4600 J00% 100% portalization Division 211 Org.11 Fund.11 finance and Administration University Accessing/Contoster PCant and Travis Services University Student Affairs Dear of Student Affairs Student Affairs University	Number of Student Affairs Description	Name Amound Precent Amound Occasion 100% D0-172800-110000-4600 100% D00-172800-110000-4600 Division 21* D0172800-110000-4600 University AccountingController Division1T Division 21* Org.11* Preue and Administration University AccountingController PCard and Tarvit Services Student Affairs Dearior 550utert Affairs Student Affairs Dearn Office University	International States Amound Amound Amound Amound Amound States Amound S	Name Annuel Annuel Precent Annuel Precent Annuel Precent Annuel Precent Precen	N \$1.00.00 Amound Precent Amound Amound 100% Amound 2000000000000000000000000000000000000

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		Odesda Finite	10/21/2024	\$1 200 00	\$1,300.00
U	Hotel Reservation	Onando, Florida	10/21/2024 \$1,		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.