



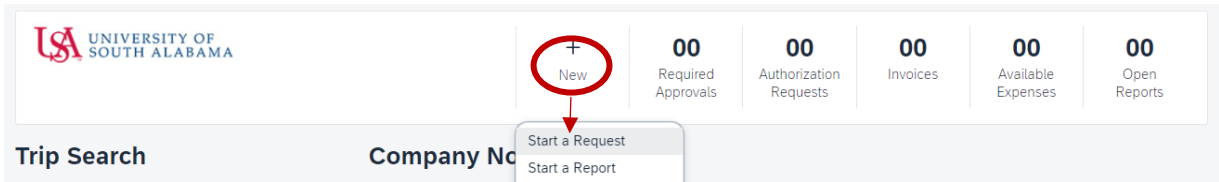
UNIVERSITY OF  
SOUTH ALABAMA

Concur  
Travel Reporting  
Request Manual

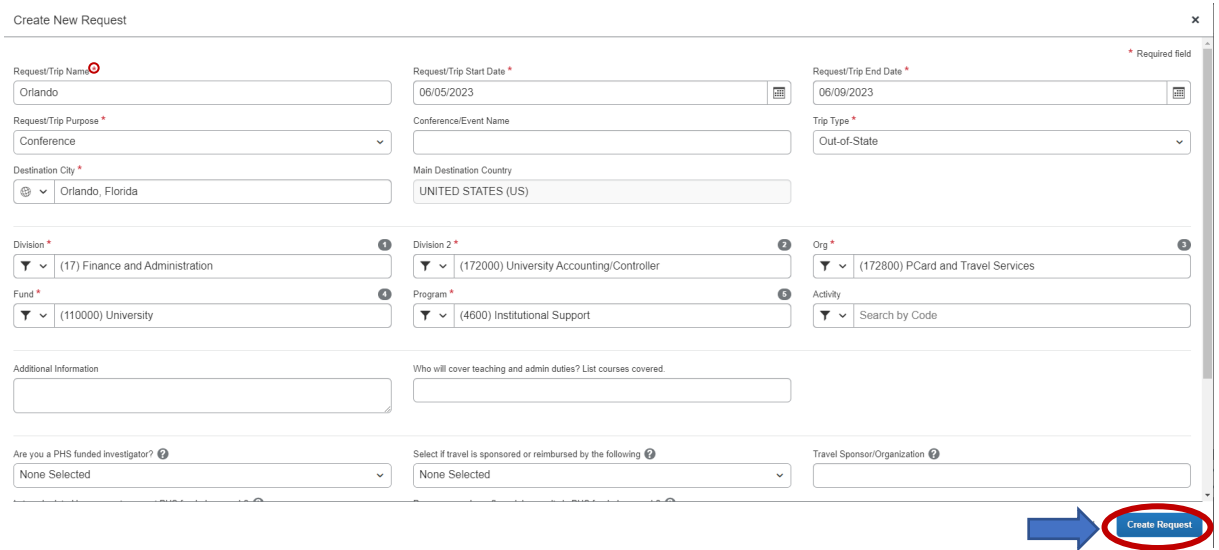
Procurement Card and Travel Services

<https://www.southalabama.edu/departments/financialaffairs/travelandprocurement/>  
650 Clinic Drive, Suite 1400  
Mobile, Alabama 36688  
251.460.6242

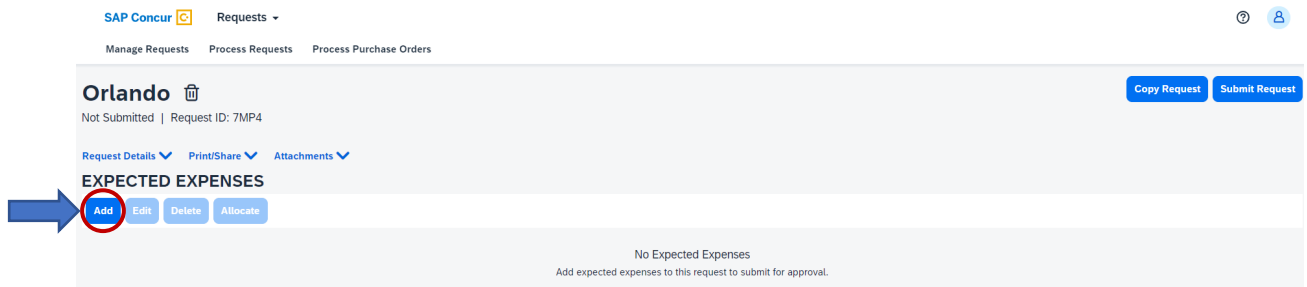
1. Log into Concur and hover your cursor over **New** and select **Start a Request**.



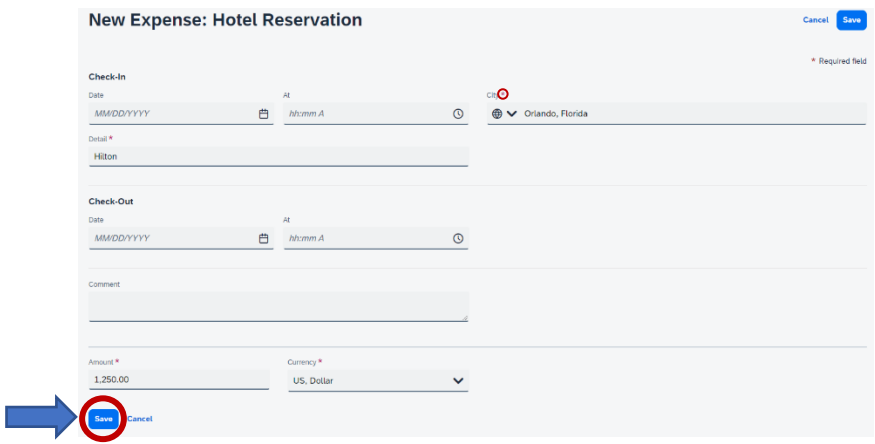
2. Complete all required fields of the Header. *Required fields are marked with a red asterisk.* Then click **Create Request**.



4. Then click **Add**.



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



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

Orlando \$1,250.00

Not Submitted | Request ID: 7MP4

Request Details Print/Share Attachments

**EXPECTED EXPENSES**

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Hotel Reservation	Orlando, Florida	05/30/2023	\$1,250.00	\$1,250.00
					\$1,250.00

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

Orlando \$1,970.00

Not Submitted | Request ID: 7MP4

Request Details Print/Share Attachments

**EXPECTED EXPENSES**

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Air Ticket	Mobile (MOB) - Orlando (MCO) : Round Trip	06/05/2023	\$600.00	\$600.00
<input type="checkbox"/>	Meals		06/05/2023	\$120.00	\$120.00
<input type="checkbox"/>	Hotel Reservation	Orlando, Florida	05/30/2023	\$1,250.00	\$1,250.00
					\$1,970.00

[Copy Request](#) [Submit Request](#)

**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 8-11. The following steps, 8-13, are applicable to Allocations only. If you do not have any allocations, then you do not need to complete these steps.**

8. To allocate an expected expense select the expense then click **Allocate**.

**Orlando \$1,970.00**

Not Submitted | Request ID: 7MP4

[Request Details](#) [Print/Share](#) [Attachments](#)

### EXPENDED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Air Ticket	Mobile (MOB) - Orlando (MCO) : Round Trip	06/05/2023	\$600.00	\$600.00
<input type="checkbox"/>	Meals		06/05/2023	\$120.00	\$120.00
<input checked="" type="checkbox"/>	Hotel Reservation	Orlando, Florida	05/30/2023	\$1,250.00	\$1,250.00
					<b>\$1,970.00</b>

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

**Allocate**

Expenses: 2 | \$1,850.00

Percent  Amount

Amount: \$1,850.00 | Allocated \$1,850.00 100% | Remaining \$0.00 0%

Default Allocation

Code: **Default** Percent %: 100

[Add](#) [Link](#) [Remove](#) [Save as Favorite](#)

No Allocations  
These expenses are assigned to your default allocation shown above. Click the allocate button to allocate part or all of these expenses differently.

[Cancel](#) [Save](#)

10. Complete the required fields and click **Save** or select from your Favorite Allocations tab (see Saving an Allocation as a Favorite on page 4 of this manual).

**Add Allocation**

[+ New Allocation](#) [★ Favorite Allocations](#)

\* Required field

Division \*  1

Division 2 \*  2

Org \*  3

Fund \*  4

[Cancel](#) [Save](#)

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

The screenshot shows the 'Allocate' window with the following details:

- Expenses: 2 | \$1,850.00
- Amount: \$1,850.00 | Allocated \$1,850.00 (100%) | Remaining \$0.00 (0%)
- Default Allocation Code: Default
- Buttons: Add, Edit, Remove, Save as Favorite
- Table with columns: Division, Org, Fund, Program, Activity, Code, Percent %

Division	Org	Fund	Program	Activity	Code	Percent %
Finance and Administration	University Accounting/Controller	PCard and Travel Services	University	Institutional Support	17-172000-172800-110000-4600	50
Student Affairs	Dean of Student Affairs	Student Affairs Deans Office	University	Student Services	20-210000-210100-110000-4500	50

12. If you need to add more funding sources repeat steps 10-11 for each new funding source.

13. After all funding sources are added click **Save**. You will see “Allocated” under the Requested amount.

Expense type	Details	Date	Amount	Requested
Hotel Reservation	Orlando, Florida	10/19/2021	\$1,200.00	\$1,200.00 Allocated

### SAVING AN ALLOCATION AS A FAVORITE

After entering your desired funding sources into the allocation in step 12, 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.

#### Add Allocation

