



# UNIVERSITY OF SOUTH ALABAMA

FLAGSHIP OF THE GULF COAST.

## Concur Travel Expense Report Manual

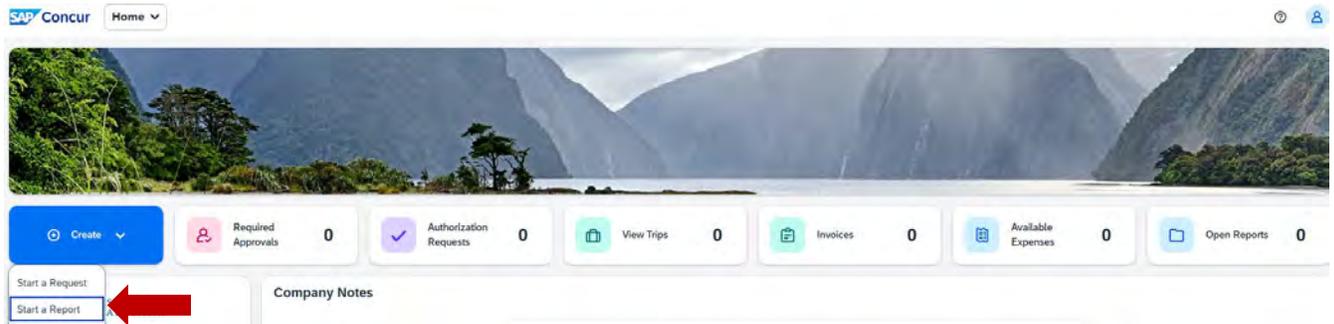
### Procurement Card and Travel Services

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

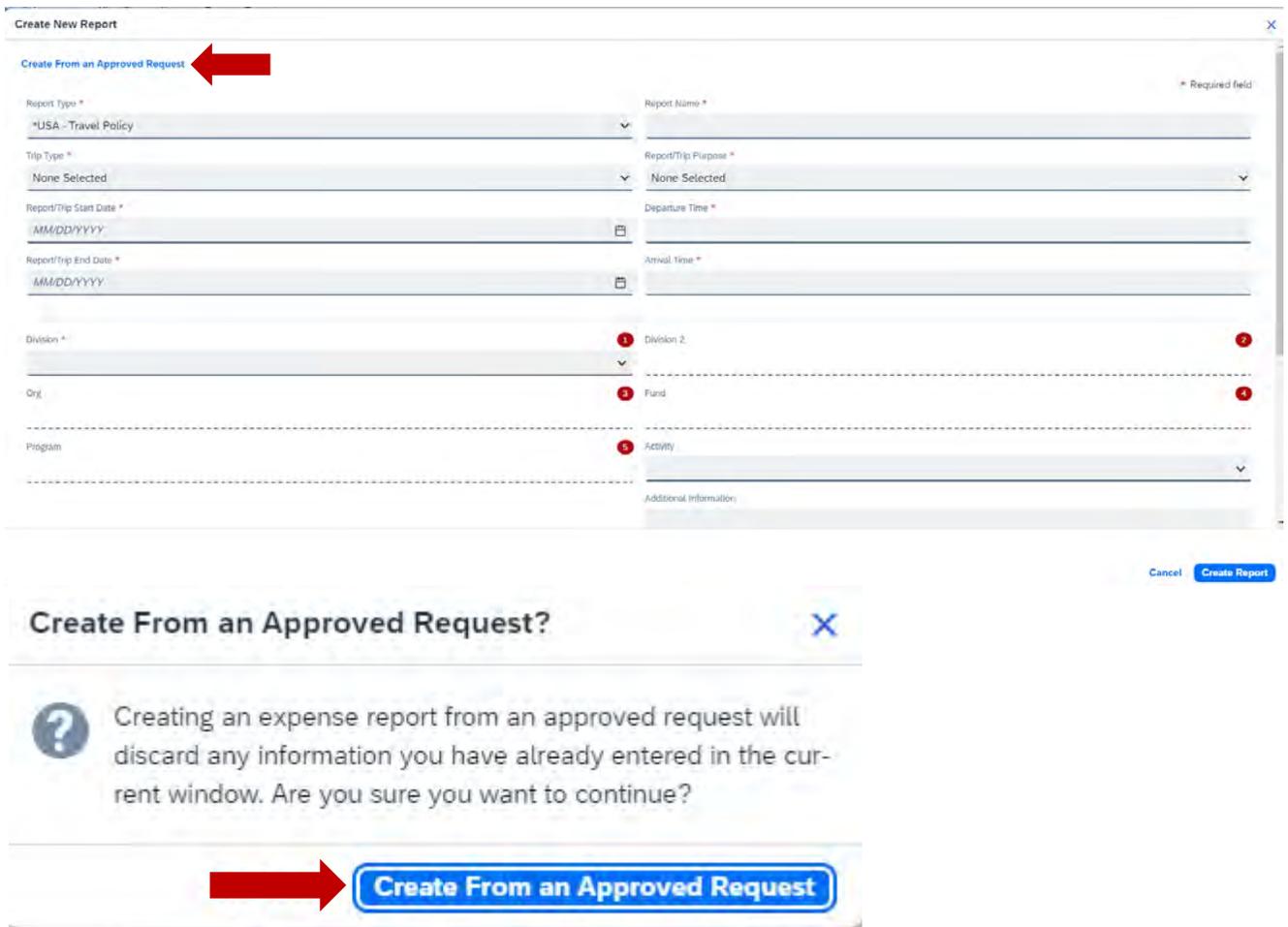
Ready. South. **Go.**

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.



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

Available Requests ✕

	Request Name↓↑	Request ID↓↑	Start Date↓↑	End Date↓↑	Cancelled↓↑	Request Total↓↑	Approved↓↑	Remaining↓
<input checked="" type="radio"/>	Concur Fusion 2022 - Orlando	67WR	03/14/2022	03/18/2022	No	\$3,000.00	\$3,000.00	\$592.29
<input type="radio"/>	Concur Fusion 2020	4MA3	03/09/2020	03/13/2020	No	\$3,000.00	\$3,000.00	\$3,000.00
<input type="radio"/>	Concur Fusion 2019	3YL6	03/11/2019	03/15/2019	No	\$3,000.00	\$3,000.00	\$478.96
<input type="radio"/>	Concur Fusion - 2018	3M9K	03/13/2018	03/16/2018	No	\$2,995.00	\$2,995.00	\$323.61
<input type="radio"/>	Montgomery	334Y	05/09/2016	05/09/2016	No	\$195.93	\$195.93	\$184.68

Create Report

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**.

Alerts: 1

### Concur Fusion 2022 - Orlando \$0.00

Not Submitted | Report Number: V57UQF

**REQUEST**

Approved: \$3,000.00 | Remaining: \$592.29

Report Details | Print/Share | Manage Receipts | View Available Receipts

- Report
- Report Header**
- Report Totals
- Report Timeline
- Audit Trail
- Linked Add-ons
- Manage Requests

Add Expense
Edit Details Copy Release Compare Expenses More

Report Header

Concur Fusion 2022 - Orlando \$0.00

Alerts: 1

Report Type *	Request Name *	Trip Type *	Report Purpose *
USA - Travel Policy	Concur Fusion 2022 - Orlando	Out-of-State	Conference
Report Start Date *	Resource Type *	Report End Date *	Annual Date *
03/14/2022		03/18/2022	
Conference Event Name	Division *	Division 2 *	Fund *
Concur Fusion 2022	(17) Finance and Administration	(172000) University Accounting/Controller	(110000) University
Program *	Activity		Report Currency
(4800) Institutional Support			US Dollar
Report Total *	Personal Expenses *	Amount for Expenses	Approval Status *
0	0	0	Not Submitted
Amount University Paid *	Amount Due University *	Amount Due Date *	Amount Approved *
0	0	0	0
Total Request Covered *	Attachments or Receipts	Qualified Amount (including OTR)	Amount Due University Easy *
0	<input type="checkbox"/>	0	0
Comments			How do you report travel (per diem/actuals/both)? *
			None Selected

Missing fields – complete then click save

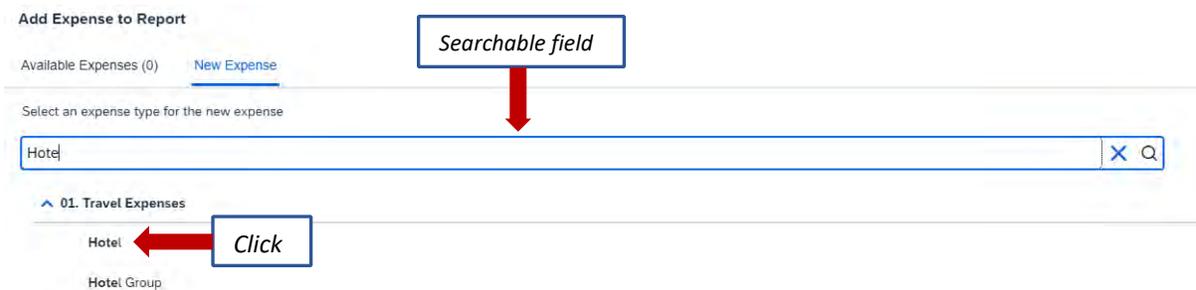
5. To add an expense click **Add Expense**.



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 not any charges under your Available Expenses tab you need to attach to this report, then select the tab **New Expense**.



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**.



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

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.

**Available Receipts (6)**  
Attach an available receipt to the expense by selecting "Attach". Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.

[Upload New Receipt](#)

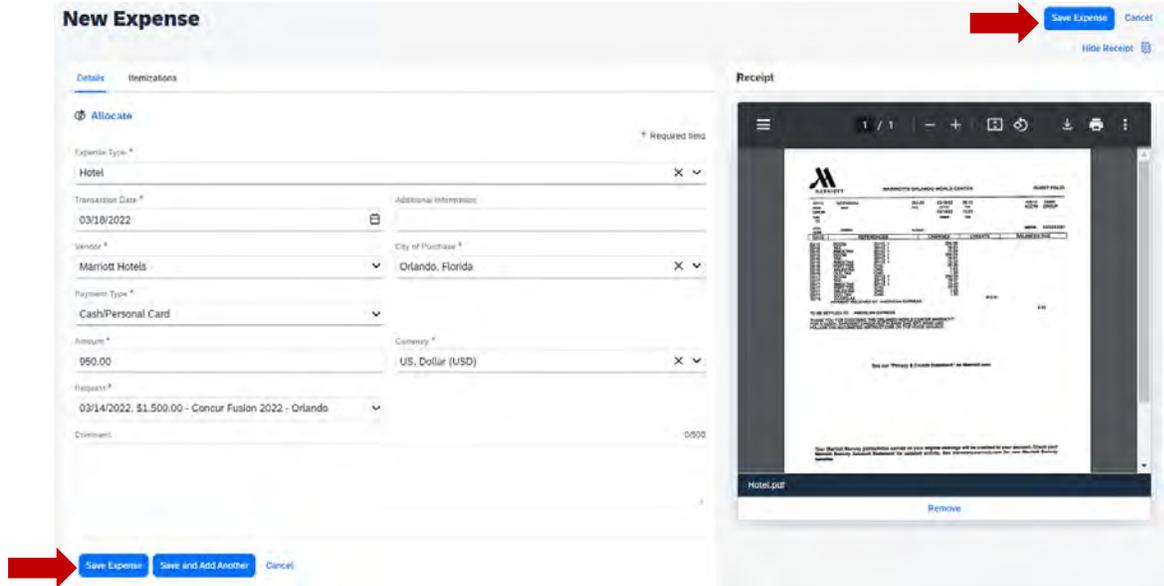
**Agenda.pdf**  
Uploaded: 08/20/2024 10:56 AM

**Baggage fees.pdf**  
Uploaded: 07/12/2024 11:37 AM

*This pop-up shows all of the receipts you have uploaded to Concur and the option to "Upload New Receipt" from your computer or other location.*

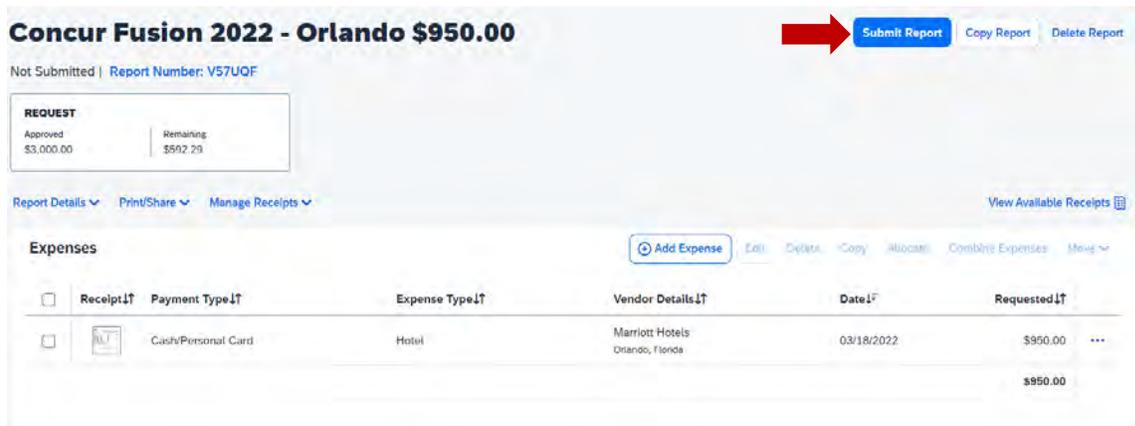
*If your receipt has already been uploaded into Available Receipts click "Attach".*

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.



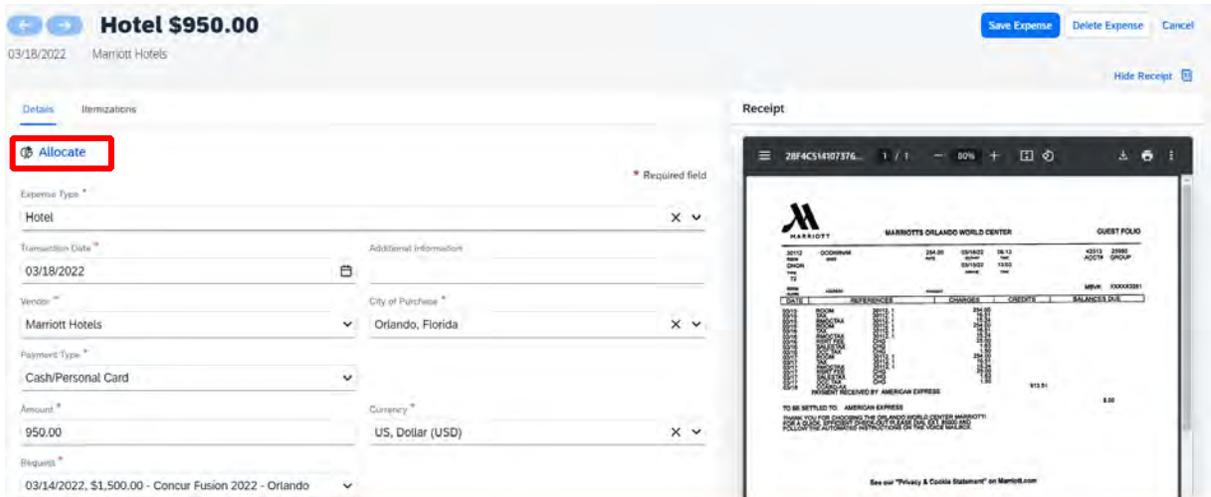
11. After you have clicked **Save Expense**, you will be back to your entire report where you can add more expenses or adjust those you have already added. To add more expenses repeat steps 5-10 for each additional expense.

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



**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.**

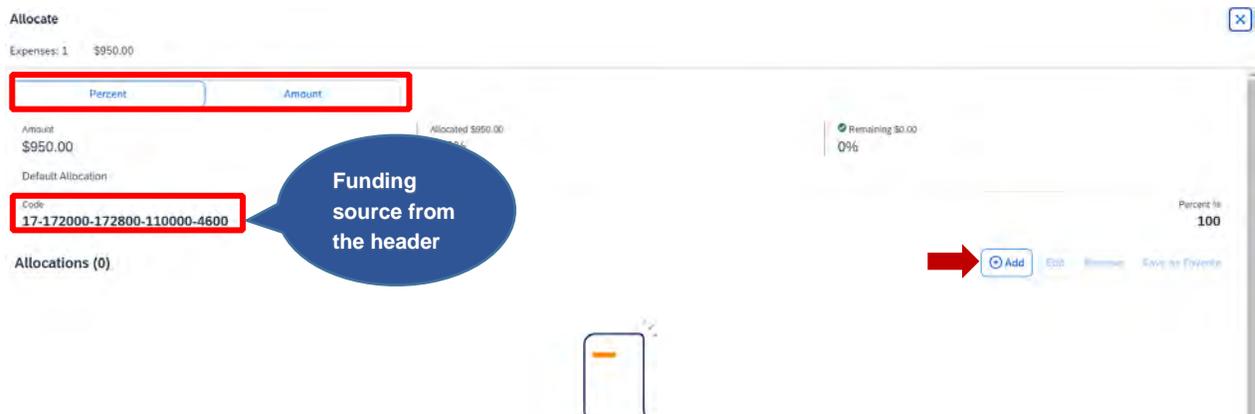
13. To allocate an expense click the expense you wish to allocate and click the **Allocate** link directly below the word Details. *Hint: You can also check the box next to the expense on your report and click the Allocate button.*



*Hint:*



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



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).

**Add Allocation**

+ New Allocation    ★ Favorite Allocations

Division \* (13) Development and Alumni Relations

Division 2 \* (13) Development and Alumni Relations

Org \* (130000) Office of VP Development & Alumni

Fund \* (110000) University

Cancel    Save

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

**Allocate**

Expenses: 1    \$950.00    View Allocation Group

Amount \$950.00    Allocated \$950.00 100%    Remaining \$0.00 0%

Code 17-172000-172800-110000-4600

**Allocations (2)**

Division	Division 2	Org	Fund	Program	Activity	Code	Percent %
Development and Alumni Relations	Development and Alumni Relations	Office of VP Development & Alumni	University	Institutional Support		13-13-130000-110000-4600	50
Finance and Administration	University Accounting/Controller	PCard and Travel Services	University	Institutional Support		17-172000-172800-110000-4600	50

Save

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
<input type="checkbox"/>	Cash/Personal Card	Hotel	Marriott Hotels Orlando, Florida	03/18/2022	\$950.00 <b>Allocated</b>
					\$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.