



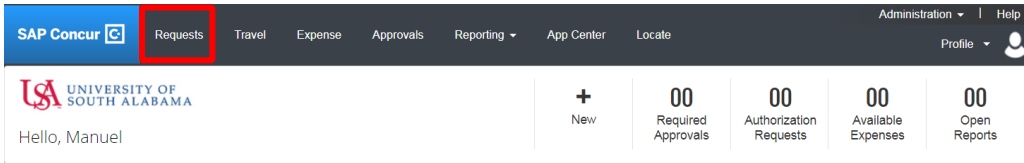
UNIVERSITY OF
SOUTH ALABAMA

Concur
Travel Reporting
NextGen Request Manual

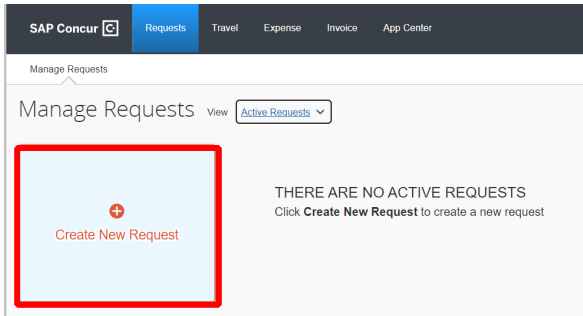
Procurement Card and Travel Services

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

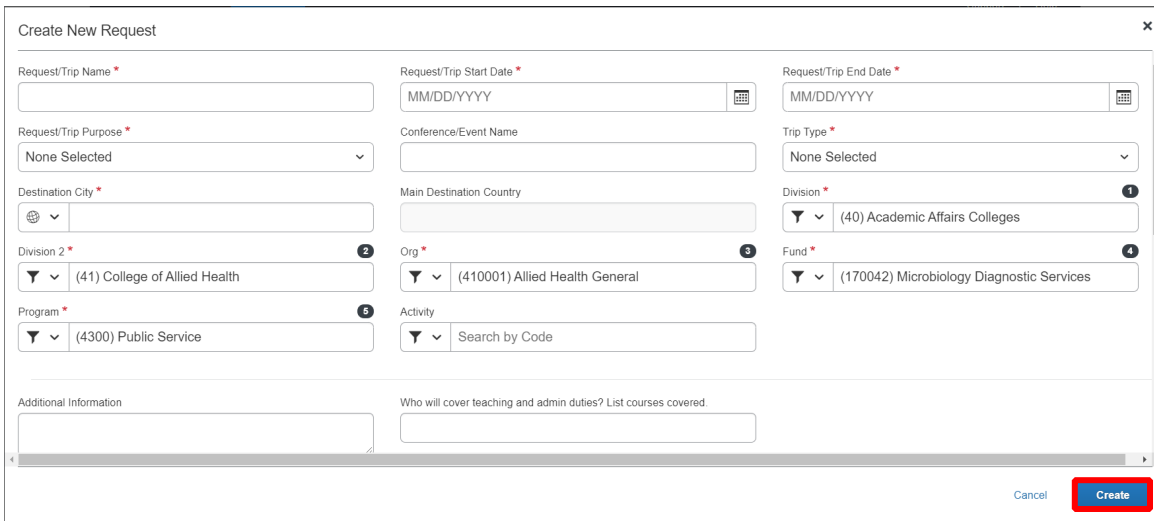
1. Log into Concur and select **Request**.



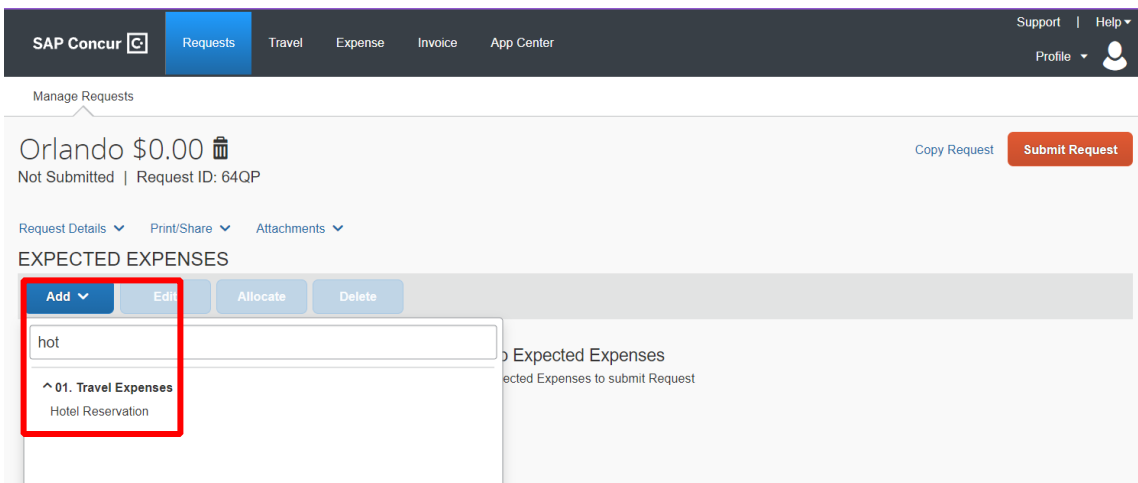
2. Click "Create New Request".



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



4. Then click **Add** and add each expected expense to your request one by one. Example below was a search for hotel.



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

New Expense: Hotel Reservation

Cancel Save

* Required field

Check-in

Date MM/DD/YYYY At hh:mm A City* Orlando, Florida

Detail* Hilton

Check-Out

Date MM/DD/YYYY At hh:mm A

Comment

Amount* 1,200.00 Currency* US, Dollar

Save Cancel

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

Manage Requests

Orlando \$1,200.00

Not Submitted | Request ID: 64QP

Copy Request Submit Request

Request Details Print/Share Attachments

EXPECTED EXPENSES

Add Edit Allocate Delete

Expense type	Details	Date	Amount	Requested
<input type="checkbox"/> Hotel Reservation	Orlando, Florida	10/19/2021	\$1,200.00	\$1,200.00

Estimated Total: \$1,200.00

7. After you have added all of your expected expenses click **Submit Request**. *If you need to allocate, assign multiple funding sources to this request, please see the following pages concerning allocations.*

Manage Requests

Orlando \$2,270.00

Not Submitted | Request ID: 64QP

Copy Request Submit Request

Request Details Print/Share Attachments

EXPECTED EXPENSES

Add Edit Allocate Delete

Expense type	Details	Date	Amount	Requested
<input type="checkbox"/> Hotel Reservation	Orlando, Florida	10/19/2021	\$1,200.00	\$1,200.00
<input type="checkbox"/> Taxi		10/19/2021	\$60.00	\$60.00
<input type="checkbox"/> Air Ticket	Mobile (MOB) - Orlando (MCO) : Round Trip	10/19/2021	\$950.00	\$950.00
<input type="checkbox"/> Baggage Fees		10/19/2021	\$60.00	\$60.00

Estimated Total: \$2,270.00

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 8-14. The following steps, 8-14, 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**.

The screenshot shows the SAP Concur 'Manage Requests' interface. At the top, there's a navigation bar with 'Requests', 'Travel', 'Expense', 'Invoice', and 'App Center'. Below that, the request details for 'Orlando \$2,270.00' are shown, including 'Not Submitted' and 'Request ID: 64QP'. Under 'EXPECTED EXPENSES', there are buttons for 'Add', 'Edit', 'Allocate', and 'Delete'. A table lists expenses: 'Hotel Reservation' (Orlando, Florida) for \$1,200.00, 'Taxi' for \$60.00, 'Air Ticket' (Mobile (MOB) - Orlando (MCO) : Round Trip) for \$950.00, and 'Baggage Fees' for \$60.00. The 'Allocate' button and the checkbox for 'Hotel Reservation' are highlighted with red boxes. The estimated total is \$2,270.00.

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

The screenshot shows the 'Allocate' dialog box. It has two tabs: 'Percent' and 'Amount'. The 'Percent' tab is selected and highlighted with a red box. Below the tabs, the amount is \$1,200.00, allocated 100%, and remaining 0%. A 'Default Allocation' section shows a code '40-41-410001-170042-4300' with a percentage of 100%. A blue arrow points from this code to a blue speech bubble on the right that says 'Funding source from the header'. At the bottom, there are 'Add', 'Edit', 'Remove', and 'Save as Favorite' buttons, and 'Save' and 'Cancel' buttons at the very bottom.

10. After you have selected Percent or Amount click **Add**.

This screenshot is identical to the previous one, but the 'Add' button in the 'Default Allocation' section is highlighted with a red box.

11. Complete the required fields and click **Add to List** or select from your Favorite Allocations tab (see Saving an Allocation as a Favorite on page 5 of this manual).

Add Allocation x

+
New Allocation

★
Favorite Allocations

* Indicates required field

Division * 1

▼ (17) Finance and Administration

Division 2 * 2

▼ (172000) University Accounting/Cor

Org * 3

▼ (172800) PCard and Travel Service

Fund * 4

▼ (110000) University

Program * 5

▼ (4600) Institutional Support

Activity

▼ Search by Code

Cancel Add to List

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

Allocate x

Expenses: 1 | \$1,200.00

Percent

Amount

Allocated \$1,200.00 100%

Remaining \$0.00 0%

Default Allocation

Code: 40-41-410001-170042-4300 Percent % 0

Add

Edit

Remove

Save as Favorite

<input type="checkbox"/>	Division	Division 2	Org	Fund	Program	Activity	Code	Percent %
<input type="checkbox"/>	Finance and Administration	Finance and Administration	Office of VP Fin and Administration	University	Institutional Support		17-17-170000-110000-4000	50
<input type="checkbox"/>	Academic Affairs Colleges	College of Allied Health	Allied Health General	Microbiology Diagnostic Services	Public Service		40-41-410001-170042-4300	50

Save Cancel

See Note

NOTE: Concur will automatically calculate the remaining to apply to the funding source keyed on the header.

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

14. After all funding sources are added click **Save**. On your report you will see “Allocated” under the Requested amount.

<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	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, (pg. 4) 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

