



UNIVERSITY OF SOUTH ALABAMA

Concur Travel Request Manual

Procurement Card and Travel Services

<https://www.southalabama.edu/departments/financialaffairs/travelandprocurement/>

650 Clinic Drive, Suite 1400

Mobile, Alabama 36688

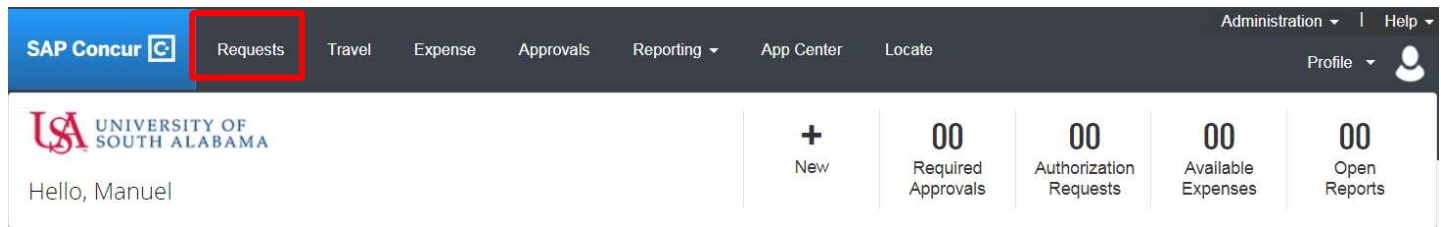
251.460.6242

Revised August 28, 2018



This page intentionally left blank.

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



2. Click **New Request**.



3. Complete all required fields of the Header. *Required fields are marked with a red line.*

Request Cancel Save Print / Email Delete Request Submit Request
 Status: Not Submitted

Request/Trip Name:
 Additional Information:

Request Header Segments Expenses Approval Flow Audit Trail

Request/Trip Name: Dallas Request/Trip Start Date: 08/29/2018 Request/Trip End Date: 09/01/2018 Request/Trip Purpose: Conference Conference/Event Name: Trip Type: Out-of-State
 Destination City: Dallas, Texas Main Destination Country: UNITED STATES

Division: (17) Finance and Administration Division 2: (17200) University Accounting/Control Org: (172800) PCard and Travel Services Fund: (110000) University Program: (4500) Institutional Support Active:

Additional Information: Comment: Who will be covering teaching and Admin duties?:

Are you a PHS funded investigator? Select if travel is sponsored or reimbursed by the following: **ONLY for PHS Investigators** Is travel related in any way to current PHS funded research? Does sponsor have financial or equity in PHS funded research? Has Attachments:

- A. Trip name, dates, purpose, and destination.
- B. Single funding source. If you need to enter multiple funding sources see allocation steps 11-14.
- C. The Additional Information & Comment fields are available for any special instructions. The field “Who will be covering...” is available for noting your coverage.
- D. Check the box next to “Has Attachments” if you have attached any documentation. See steps 9-10 for instructions on attaching documents.

4. Next click the **Segments** tab.

Request Cancel Save Print / Email Delete Request Submit Request
 Status: Not Submitted

Request/Trip Name:
 Additional Information:

Request Header Segments Expenses Approval Flow Audit Trail





5. If you have any Airfare, Rail, Rental Car, or Hotel to place on this request click the appropriate icon and complete the required fields. *Required fields are marked with a red line.* Click save. *For this illustration we are entering Airfare.* If you do **not** have any Airfare, Rail, Rental Car, or Hotel you need to include on this request go to step 6.

Request 3U4C Attachments Print / Email Delete Request Submit Request
Status: Not Submitted

Request/Trip Name: Dallas
Additional Information:

Request Header Segments **Expenses** Approval Flow Audit Trail

Add Segment
CLICK ICON TO CREATE SEGMENT

Air Ticket Round Trip One Way Multi-Segment Amount: 600.00 USD

Outbound
From: Mobile Municipal (Airport - MOB), Mobile, Alabama
To: Dallas Ft Worth Intl (Airport - DFW), Dallas, Texas
Date: 08/29/2018 Depart at: 03:00 pm
Comment:

Return
Date: 09/01/2018 Depart at: 04:00 pm
Comment:

Save Cancel

6. To enter other expenses click the **Expenses** tab.

Request 3U4C Attachments Print / Email Delete Request Submit Request
Status: Not Submitted
Amount: \$600.00

Request/Trip Name: Dallas
Additional Information:

Request Header Segments **Expenses** Approval Flow Audit Trail

+ New Expense Delete

| Date | Expense Type | Amount | Requested |
|------------|--------------|----------|-----------|
| 08/29/2018 | Airfare | \$600.00 | \$600.00 |

TOTAL AMOUNT \$600.00 TOTAL REQUESTED \$600.00

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

| | | | |
|---|-----------------------|---------------------------------------|------------------------------|
| 01. Travel Expenses | 02. Transportation | 03. Individual Meals | 07. Other |
| Estimated Personal Mileage | Baggage Fees | Individual Meals (International Only) | Conference Registration/Fees |
| Outside Funding | Fuel | Meals | Food Products |
| Per Diem-In State (one overnight stay) \$85.00/day | Parking | 04. Meals & Entertainment | Miscellaneous |
| Per Diem-In State (Overnight) \$75.00 | Public Transportation | Group Meals/Entertainment | |
| Per Diem-In State (two or more nights) \$100.00/day | Taxi | | |
| Per Diem-In State 12+hrs (No Overnight) \$34.00 | Tolls | | |
| Per Diem-In State 6-12 hrs \$12.75 | | | |
| Personal Funding | | | |

Note: The left-hand side of your screen is your report and the right-hand side contains possible anticipated expenses you can add to your report.

7. To add an expense click the **Expense Type** you wish to add, complete the required fields, and click **Save**. Do this for all your anticipate expenses.

Request 3U4C Attachments Print / Email Delete Request **Submit Request**

Request/Trip Name: Dallas Status: Not Submitted
Amount: \$600.00

Additional Information:

Request Header Segments Expenses Approval Flow Audit Trail

+ New Expense Delete

| Date | Expense Type | Amount | Requested |
|-------------------------------------|--------------|----------|-----------|
| <input type="checkbox"/> 08/29/2018 | Airfare | \$600.00 | \$600.00 |

Expense Type: Transaction Date: Description:

Transaction Amount: Comment:

TOTAL AMOUNT **\$600.00** TOTAL REQUESTED **\$600.00** Save Allocate Cancel

Note: For Requests the transaction date is the first day of travel and the amounts are estimates. The Description & Comment boxes are optional.

8. After you have added all anticipated expenses click **Submit Request**.

Request 3U4C Attachments Print / Email Delete Request **Submit Request**

Request/Trip Name: Dallas Status: Not Submitted
Amount: \$650.00

Additional Information:

Request Header Segments Expenses Approval Flow Audit Trail

+ New Expense Delete

| Date | Expense Type | Amount | Requested |
|-------------------------------------|--------------|----------|-----------|
| <input type="checkbox"/> 08/29/2018 | Airfare | \$600.00 | \$600.00 |
| <input type="checkbox"/> 08/29/2018 | Baggage Fees | \$50.00 | \$50.00 |

Expense Type:

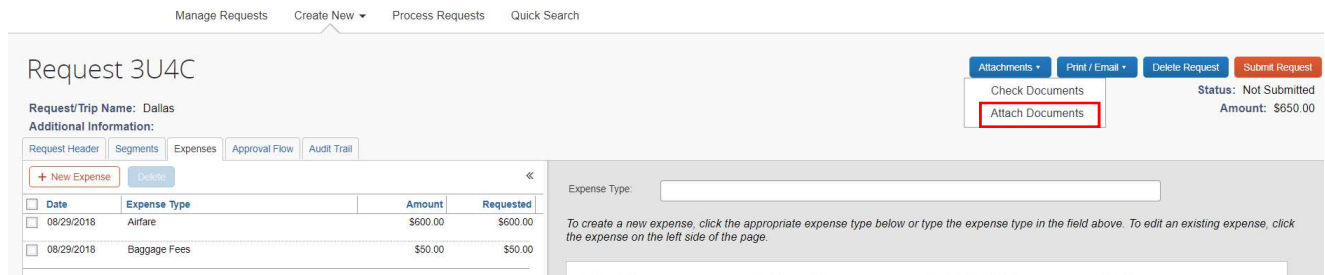
To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

| | | | |
|--|--|---|--|
| <p>01. Travel Expenses</p> <p>Estimated Personal Mileage</p> <p>Outside Funding</p> <p>Per Diem-In State (one overnight stay) \$85.00/day</p> <p>Per Diem-In State (Overnight) \$75.00</p> <p>Per Diem-In State (two or more nights) \$100.00/day</p> <p>Per Diem-In State 12+hrs (No Overnight) \$34.00</p> <p>Per Diem-In State 6-12 hrs \$12.75</p> <p>Personal Funding</p> | <p>02. Transportation</p> <p>Baggage Fees</p> <p>Fuel</p> <p>Parking</p> <p>Public Transportation</p> <p>Taxi</p> <p>Tolls</p> | <p>03. Individual Meals</p> <p>Individual Meals (International Only)</p> <p>Meals</p> <p>04. Meals & Entertainment</p> <p>Group Meals/Entertainment</p> | <p>07. Other</p> <p>Conference Registration/Fees</p> <p>Food Products</p> <p>Miscellaneous</p> |
|--|--|---|--|

TOTAL AMOUNT **\$650.00** TOTAL REQUESTED **\$650.00**

Instructions for adding attachments:

9. If you need to add attachments to your Request click the **Attachments – Attach Documents**.

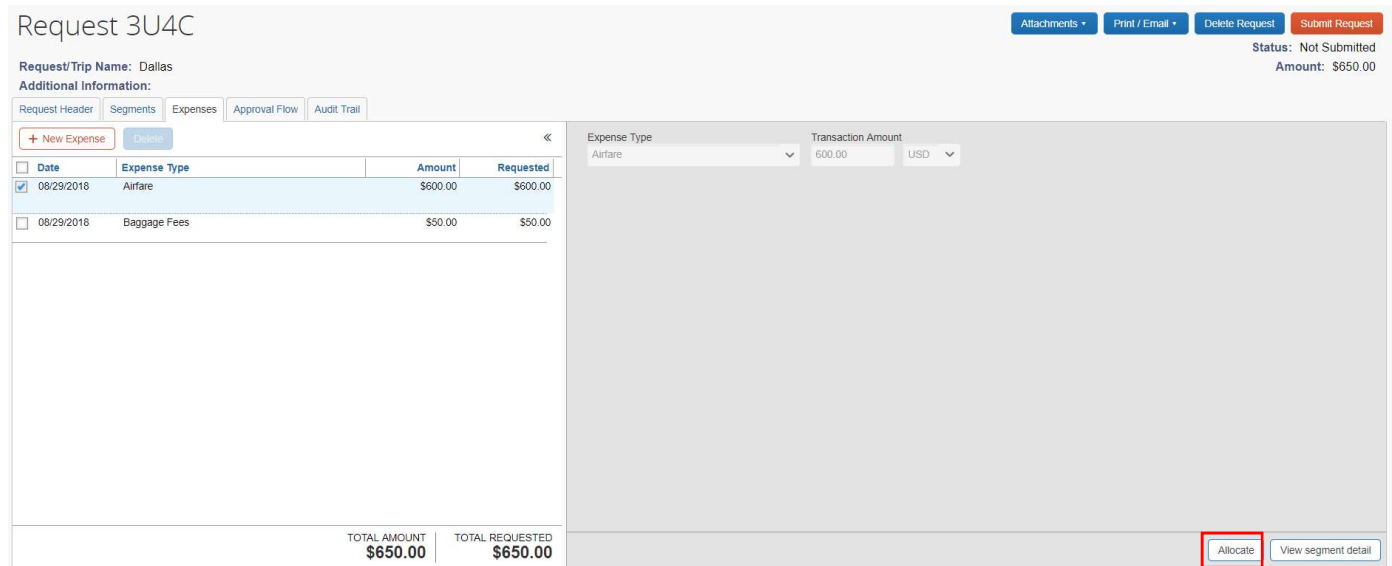


10. Browse for your document(s) then select the document(s) you wish to upload and click **Upload**.



NOTE: The following steps, 11-14, are applicable to Allocations. If you do not have any allocations, then you do not need to complete these steps.

11. To allocate an expense select any expense and click the **Allocate** button.



12. Select the expense you wish to allocate then select **Allocate Selected Expenses**.

Allocations for Request : Dallas ☐ ✕

Request List

Allocate Selected Expenses Clear Selections Summary

Select Group ▾

| <input type="checkbox"/> | Date ▾ | Expense Type | Group | Amount |
|-------------------------------------|------------|--------------|-------|----------|
| <input checked="" type="checkbox"/> | 08/29/2018 | Airfare | 1 | \$600.00 |
| <input type="checkbox"/> | 08/29/2018 | Baggage Fees | | \$50.00 |

Allocations Total:\$600.00 Allocated:\$0.00(0%) Remaining:\$600.00(100%)

Allocate By: ▾ | Add New Allocation Delete Selected Allocations Favorites ▾ Add to Favorites

| <input type="checkbox"/> | Percentage | * Division | * Division 2 | * Org | * Fund | * Program | Activity | Code |
|--------------------------|------------|------------|--------------|-------|--------|-----------|----------|------|
| <input type="checkbox"/> | | | | | | | | |

13. The default for allocations is by percentage however, you can click **Allocate By** and change to Amount if you wish. For this example we are going with percentage.

Allocations for Request : Dallas ☐ ✕

Request List

Allocate Selected Expenses Clear Selections Summary

Select Group ▾

| <input type="checkbox"/> | Date ▾ | Expense Type | Group | Amount |
|-------------------------------------|------------|--------------|-------|----------|
| <input checked="" type="checkbox"/> | 08/29/2018 | Airfare | | \$600.00 |
| <input type="checkbox"/> | 08/29/2018 | Baggage Fees | | \$50.00 |

Allocations Total:\$600.00 Allocated:\$600.00(100%) Remaining:\$0.00(0%)

Allocate By: ▾ | Add New Allocation Delete Selected Allocations Favorites ▾ Add to Favorites

| <input type="checkbox"/> | Percentage | * Division | * Division 2 | * Org | * Fund | * Program | Activity | Code |
|--------------------------|------------|-------------------|------------------|-------------------|-------------------|---------------------|----------|-------------|
| <input type="checkbox"/> | 50 | (17) Finance a... | (172000) Univ... | (172800) PCar... | (110000) Unive... | (4600) Instituti... | | (17) Financ |
| <input type="checkbox"/> | 25 | (17) Finance a... | (172000) Univ... | (172300) Grant... | (110000) Unive... | (4600) Instituti... | | (17) Financ |
| <input type="checkbox"/> | 25 | (17) Finance a... | (172000) Univ... | (172100) Busi... | (110000) Unive... | (4600) Instituti... | | (17) Financ |

Fill in the Percentage, Division, Division 2, Org, Fund, and Program codes for each funding source you need to allocate to. Then click Save.

14. You will now see a pie chart icon next to any expenses you have allocated. Illustration below.

Request 3U4C

Request/Trip Name: Dallas

Additional Information:

Request Header | Segments | Expenses | Approval Flow | Audit Trail

+ New Expense Delete ⏪

| <input type="checkbox"/> | Date | Expense Type | Amount | Requested |
|-------------------------------------|------------|--------------|----------|-----------|
| <input checked="" type="checkbox"/> | 08/29/2018 | Airfare | \$600.00 | \$600.00 |
| <input type="checkbox"/> | 08/29/2018 | Baggage Fees | \$50.00 | \$50.00 |

TIP:

SAVING AN ALLOCATION AS A FAVORITE

After entering your desired funding sources into the allocation in step 13 you can click **Add to Favorites** give it a name and save. It will then be available under the **Favorites** button the next time you need to allocate to the same funding source(s) as the favorite you saved.

Allocations for Request : Dallas ☐ ✕

Request List

Allocate Selected Expenses Clear Selections Summary

Select Group ▾

| <input type="checkbox"/> | Date ▾ | Expense Type | Group | Amount |
|-------------------------------------|------------|--------------|-------|----------|
| <input checked="" type="checkbox"/> | 08/29/2018 | Airfare | 1 | \$600.00 |
| <input type="checkbox"/> | 08/29/2018 | Baggage Fees | | \$50.00 |

Allocations Total:\$600.00 Allocated:\$600.00(100%) Remaining:\$0.00(0%)

Allocate By: ▾ | Add New Allocation Delete Selected Allocations Favorites ▾ Add to Favorites

| <input type="checkbox"/> | Percentage | * Division | * Division 2 | * Org | * Fund | * Program | Activity | Code |
|--------------------------|------------|-------------------|------------------|-------------------|-------------------|---------------------|----------|-------------|
| <input type="checkbox"/> | 50 | (17) Finance a... | (172000) Univ... | (172800) PCar... | (110000) Unive... | (4600) Instituti... | | (17) Financ |
| <input type="checkbox"/> | 25 | (17) Finance a... | (172000) Univ... | (172300) Grant... | (110000) Unive... | (4600) Instituti... | | (17) Financ |
| <input type="checkbox"/> | 25 | (17) Finance a... | (172000) Univ... | (172100) Busi... | (110000) Unive... | (4600) Instituti... | | (17) Financ |