



# UNIVERSITY OF SOUTH ALABAMA

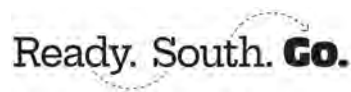
FLAGSHIP OF THE GULF COAST.

## Concur Travel Request Manual

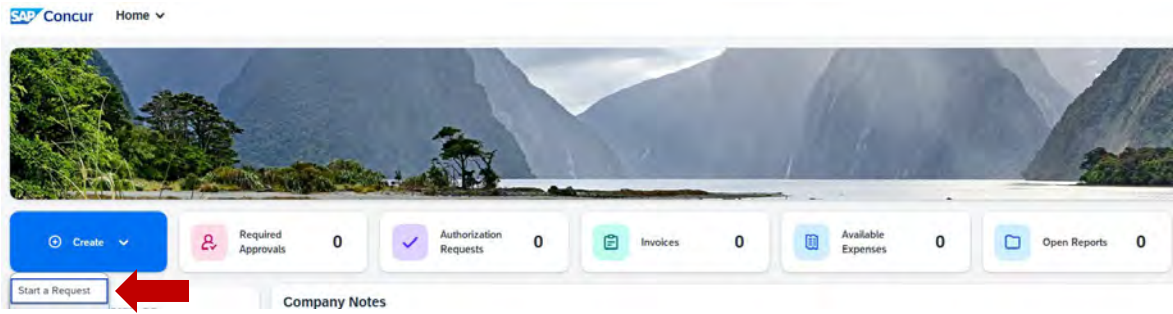
### **Procurement Card and Travel Services**

650 Clinic Drive Suite 1400 | Mobile, Alabama | 36688 | 251.460.6242

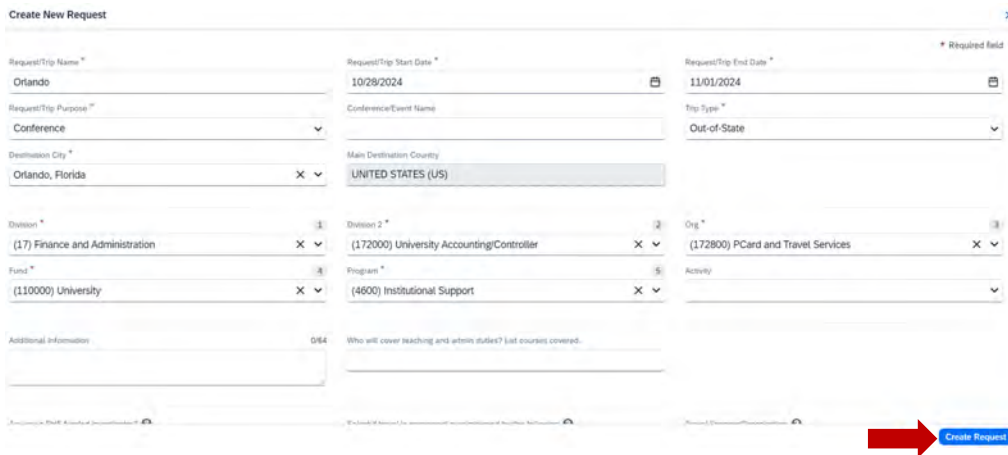
[pcardandtravelsvcs@southalabama.edu](mailto:pcardandtravelsvcs@southalabama.edu)



1. Log into Concur and click **Create** and select **Start a Request**.



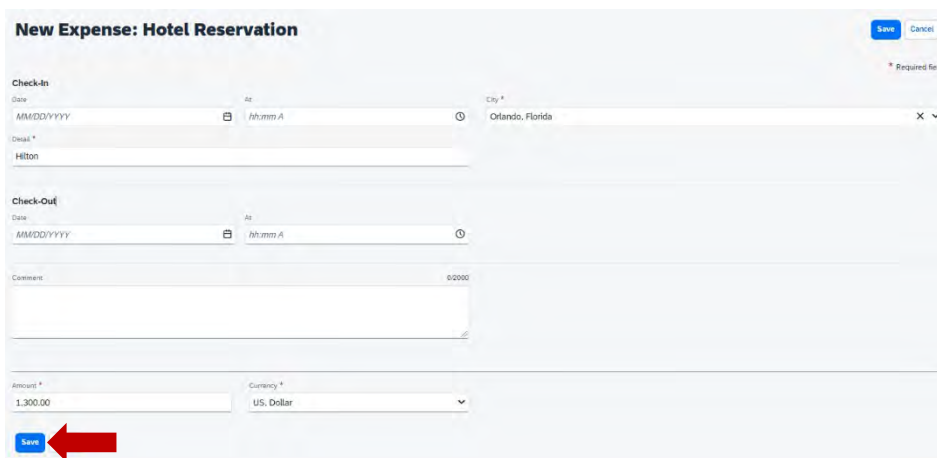
2. Complete all required fields as indicated by the **red asterisk** next to the field name then click **Create Request**.



3. Click **Add**.



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

**Orlando \$1,300.00** Submit Request Copy Request Delete Request

Not Submitted | Request ID: 97DR

[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	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**.

**Orlando \$1,300.00** Submit Request Copy Request Delete Request

Not Submitted | Request ID: 97DR

[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	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 then click **Allocate**.

**Orlando \$1,300.00** Submit Request Copy Request Delete Request

Not Submitted | Request ID: 97DR

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

**EXPECTED EXPENSES** Add Edit Delete Allocate

<input checked="" type="checkbox"/> Expense type	Details	Date	Amount	Requested
<input checked="" type="checkbox"/> 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%

Remaining \$0.00  
0%

Code  
17-172000-172800-110000-4600

Allocations (0)

Add Edit Cancel Close Print

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).

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

Division	Division 2	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

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
Hotel Reservation	Orlando, Florida	10/21/2024	\$1,300.00	\$1,300.00 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.