



UNIVERSITY OF SOUTH ALABAMA

FLAGSHIP OF THE GULF COAST.



What do you need to do?

Create a Request

1. Log into Concur.
2. Click **Create**.
3. Click **Start a Request**.
4. Complete all required fields on the Request Header as indicated by the **red asterisks**.
5. Click the **Create Request** button.
6. Click the **Add** button and begin enter expenses you are anticipating one by one.
7. Once you have all of your estimated expenses entered, click **Submit Request**.

Create a Travel Expense report

1. Log into Concur.
2. Click **Create**.
3. Click **Start a Report**.
4. Click the link "**Create From an Approved Request**".
5. Click the **Alerts** then click **View** and complete the remaining required fields indicated by the **red highlighted fields**.
6. Click **Save**.
7. Click **Add Expense** to add expenses to the report and attach all required documentation.
8. Once you have all your expenses and required documentation assigned to the report click **Submit Report**.

Create a P-Card Expense report

1. Log into Concur.
2. Click **Create**.
3. Click on **Start a Report**.
4. In the dropdown field "**Report Type**", select **USA Procurement Policy**.
5. Complete all required fields on the Report Header as indicated by the **red asterisks**.
6. Click **Create Report**.
7. Click **Add Expense** then **Available Expenses** to add PCard transactions to the report.
8. Assign each transaction an Expense Type and Purpose.
9. Attached required invoice/receipt to each transaction.
10. Once you have all the transactions assigned to this report you wish to have assigned click **Submit Report**.

Methods for uploading documents to your Concur “Available Receipts”

1. Email attachment(s) or scan document(s) to receipts@concur.com from your USA email account.
2. Use the Concur mobile app to take pictures of your receipts/documentation.

You can also scan receipt(s)/document(s) to your computer. This method does not save it to the “Available Receipts” however, it allows you to select these documents for your report.

Attaching documents to Expense line items in your Concur report via “Available Receipts” or your Computer

1. Select the **Expense** to which you need to attach a receipt.
2. Select the **Add Receipt** at the right.
3. Click **Attach** under the receipt you have uploaded to **Available Receipts**.
OR
4. Click **Upload New Receipt** and find the receipt/document you saved to your computer.
5. Click **Open to attach**.
6. Click **Save Expense**.

Attaching documents to your Concur report as a whole, e.g. a document pertaining to the entire report not an individual line item

1. Select the **Manage Receipts**.
2. Click **Manage Attachments**.
3. Click **Add** and locate the receipts/documents you wish to add then click Open.
4. **Close** the open manage attachments box.

For assistance with travel please contact Charisse Armstrong @ 460-6870 and for P-card reporting Shantarry Norris-Griggs @ 460-6646. Main office: 460-6242. More information is available @ <https://www.southalabama.edu/departments/financialaffairs/travelandprocurement/>