



UNIVERSITY OF  
SOUTH ALABAMA

# SAP Concur



## What do you need to do?

### Create a Request

1. Log into Concur.
2. Click on **Requests** at the top of the screen.
3. Click **Create New Request**.
4. Complete all required fields on the Request Header as indicated by the **red lines**.
5. Click on the **Segments** tab if you have any airfare, hotel, rail, or car rental for this request and enter them here.
6. Click on the **Expenses** tab and enter any other expenses you are anticipating.
7. Once you have all of your estimated expenses entered, click **Submit Request**.

### Create a Travel Expense report

1. Log into Concur.
2. Click on **Expense** at the top of the screen.
3. Click **Create New Report**.
4. In the dropdown field "**Report Type**", select **USA Travel Policy**.
5. Complete all required fields on the Report Header as indicated by the **red lines**.
6. Under the Requests tab at the bottom of the screen click **Add**.
7. Click the **Approved Request** associated with this travel and click **Add**.
8. Click **Next**.
9. Assign the applicable expenses to the report and attach all required documentation.
10. 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 on **Expense** at the top of the screen.
3. Click on **Create New 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 lines**.
6. Click **Next**.
7. Click the box next to the P-Card charges you wish to assign to this report and click **Move**.
8. Assign each charge an Expense Type and Purpose.
9. Attached required invoice/receipt to each charge.
10. Once you have all the charges assigned to this report you wish to have assigned click **Submit Report**.

**Methods for attaching receipts located on the back of this page.**

### Methods for uploading documents to your Concur “Available Receipts”

1. Email attachment(s) or scan document(s) to [receipts@concur.com](mailto: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 **Attach Receipts button** at the bottom right.
3. Check the box next to the receipt you have uploaded to **Available Receipts**.  
**OR**
4. Click **Browse** and find the receipt/document you saved to your computer.
5. Click **Attach**.
6. Click **Save**.

### 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 **Receipts – Attach Receipt Images** directly above the Amount column.
2. Click **Browse** and find the receipt/document you saved to your computer.
3. Click **Upload**.
4. Click **Close**.

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/>