Blanket Travel Expense Guide

Trainings and Support for Concur

The links provided below have training guides and resources you can access if you have any questions regarding Concur or need help troubleshooting.

Concur User Support

Concur Trainings

Concur Video Channel

24/7 Help Line for User Support: 866-793-4040

Blanket Travel Expense Approval Workflow

- **Traveler (Initiator)**
  - Submit blanket travel expense report
    - How to create Blanket Travel Expense Report
    - How to create Blanket Travel Expense Report Header

- **Department Coordinator/COE Travel**
  - Review expense report and ensure all necessary information is inputted
    - **Dept. Coordinator will leave comment “ready for COE Travel review” in the comments section**

  - Review expense report to ensure all necessary information and the correct travel request is linked
    - **COE Travel will notify Dept. Chair via Concur when it is "ready for approval"**

- **Department Chair**
  - Verify blanket travel, confirm budget/account information, and approves to send it to Dean
    - **Please check dept. coordinator and coetravel has reviewed before approving**

- **Budget Analyst**
  - Alicia will review chartfields and funding source and let the Dean know it is "ready for approval"

- **Dean**
  - Reviews report and gives final approval
Blanket Travel Expense Report

Step 1: From the Concur Dashboard, click on the Requests tab.

Step 2: Go to your approved Blanket Travel Request.

** If you have an approved Blanket Travel Request, please go to How to link a paper travel request for instructions **

Step 3: On the right-hand side of the coordinating request, click on the Expense link.

Report Header

Step 1: In the Report header, change the Policy to State Blanket Travel Policy.

Step 2: Under the Blanket Travel Month / Year field, change the naming convention to Blanket Travel [Month][Year].

Ex: Blanket Travel JUL 2023

Step 3: Leave Report Date as the date that you are creating the report.
Step 4: For Month Start Date, change the date to the beginning of the month you are traveling.

Step 5: For Month End Date, change the date to the end of the month you are traveling.

** You will submit one report for the entire month. Expense reports are due by the 15th of the following month.**

Step 6: For Trip Type dropdown, leave as In-State selection.

Step 7: For Were Registration Fees incurred or paid by the University? dropdown, select the appropriate option.

Step 8: For Report/Trip Purpose dropdown, select Blanket Travel (Mileage and Parking).

Step 9: For Event Name / Business Purpose field, type Blanket Travel and your business purpose for driving.

Step 10: For Mailing Address Current? check the box if your residential address is current in Accounts Payable System to mail your reimbursement check.

Step 11: For Division, Department ID, and Fund

- “Division” and “Department ID” will automatically be filled out for you
- FUND: THEFD
- Add PROGRAM: 5629
Step 12: Enter in the **Comment** section if you have the following:

- Have approved paper Blanket Travel Request - List the TR#

![Comment](image)

Step 13: Once you have filled everything out, click on the **Create Report** button.

Step 14: To confirm that your travel request has been linked to your expense report, you will see a Request box listed under the Report Details.

![Request Details](image)

Step 15: Once you click on the Request box, you will see your travel request linked to your expense report.

![Request](image)

**Note:** Please make sure that you have the correct blanket travel request linked. If you are in multiple departments and submitted multiple travel requests, ensure that you have the correct department funding linked. If you have multiple travel requests, you will be submitting separate blanket travel expense reports, one for each department per month, to link the correct department funding.

**The Department Chair of the second department will also need to be added into the approval flow. (Click **Report Details**>Select **Report Timeline**>Edit Approval Flow>click "+”>Search and select Department Chair>Click **Save**)**

**Adding Blanket Travel Expenses**

**Personal Car Mileage Expenses**

Step 1: If you are claiming mileage, click on the **Add Expense** button under Report Details.

![Add Expense](image)
Step 2: A window will pop-up. Click on the + Create New Expense tab.

Step 3: Click on Personal Car Mileage under the Mileage section.

Step 4: A Mileage Calculator window will display. Enter in your starting location in Point A. Your starting location can be work/home but you must choose the shortest distance driven.

Step 5: Fill in the location you are heading to in Point B.
Step 6: Click on the **Calculate Route**.

![Calculate Route](image)

Step 7: Click on **Make Round Trip**, if you are returning to your work location.

If you made multiple trips throughout the month, you can add it to the same Blanket Travel Expense Report.

![Make Round Trip](image)

Step 8: When you are done adding your mileage, click on the **Add Mileage to Expense** button.

Step 9: Under **Transaction Date**, click on your travel date.

![Transaction Date](image)

Step 10: Fill out your **Departure Time** and **Return Time**.

Step 11: Under **Type of Work Day**, click on the appropriate option. (If supervising, use "Supervision of Teachers")

Step 12: Under **Purpose of the Trip**, enter in the purpose of your trip if it is different from your report header.

![Purpose of the Trip](image)

Step 13: Under **Comment**, you may enter in details of the trip, i.e. purpose of your trip. (If you are supervising a student, please input the school site, name of student, and department (if you supervise for multiple departments)

![Comment](image)
Step 14: Under **Request** dropdown, click on the approved Blanket Travel Request if you have it available in Concur. You will also have to input the 4 character Travel Request # in "Request ID" field.

![Request dropdown](image)

**Request**

07/01/2018, $162.00 - [ ]

**Request ID**

![Request ID field](image)

Step 15: Once you have filled everything out, click on the **Save Expense** button.

![Save Expense button](image)

**Add Attachments to Expense Report:**

You will need to two maps each trip (Please date each map so the maps correspond with the proper trip)

1. Map showing distance from work to location/ school you are driving to
2. Map showing distance from home to location/ school you are driving to

**If the maps are not uploaded your expense report will be considered incomplete**

Step 1: Click on manage receipts and click manage attachments

![Manage attachments](image)

Step 2: Click upload report level attachment and select documents you want to upload

![Upload report level attachment](image)

Not seeing your attachment? Try again in a few minutes.