

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 trouble shooting.

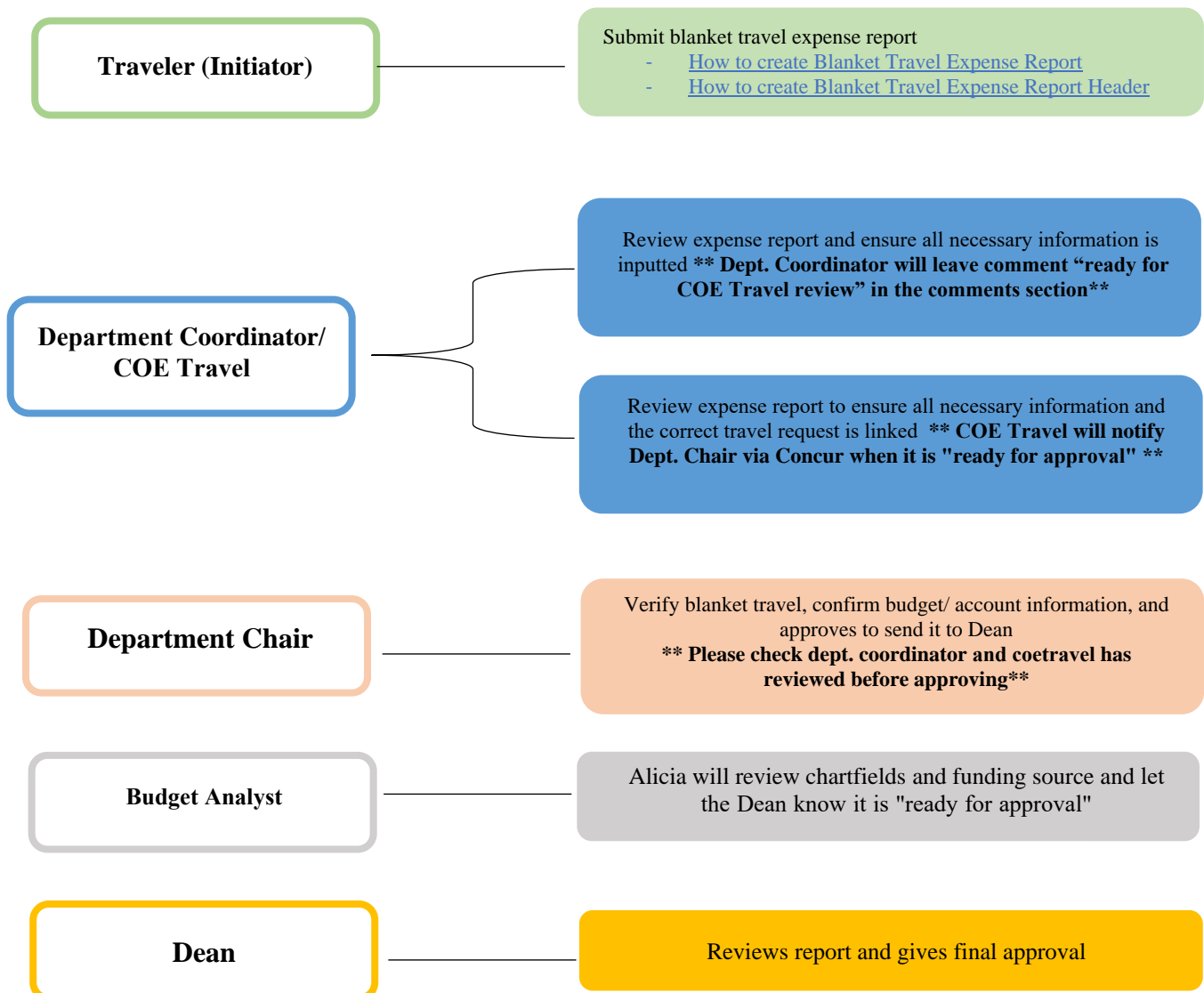
[Concur User Support](#)

[Concur Trainings](#)

[Concur Video Channel](#)

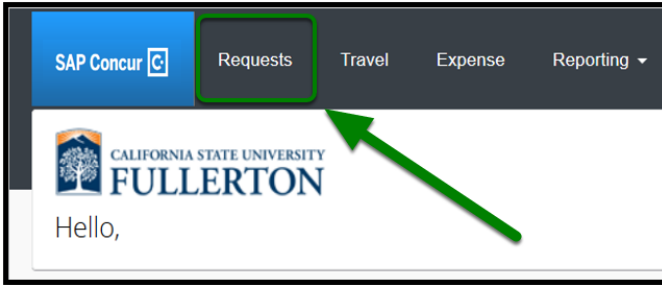
24/7 Help Line for User Support: 866-793-4040

Blanket Travel Expense Approval Workflow

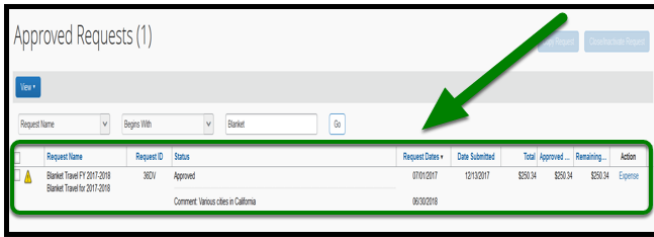


Blanket Travel Expense Report

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

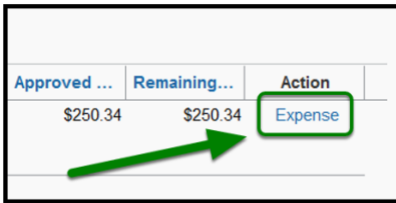


Step 2: Go to your approved **Blanket Travel Request**.



** 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.



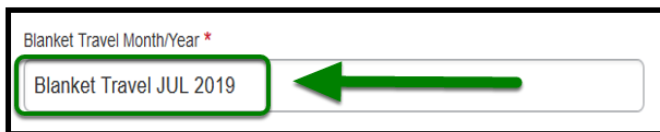
Report Header

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]**.

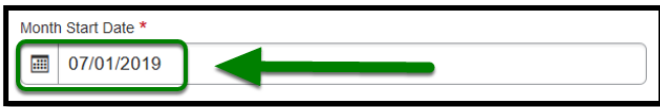
Ex: Blanket Travel JUL 2023



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.



Month Start Date *

07/01/2019

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

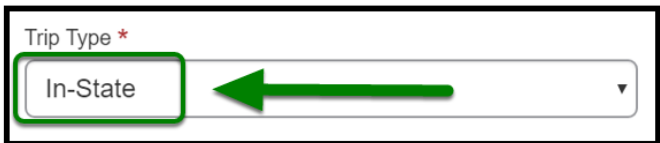


Month End Date *

07/31/2019

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

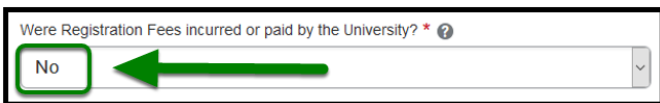
Step 6: For **Trip Type** dropdown, leave as In-State selection.



Trip Type *

In-State

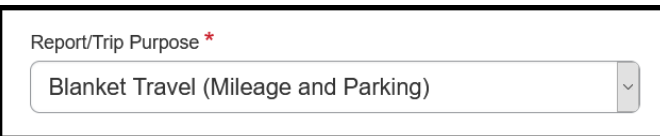
Step 7: For **Were Registration Fees incurred or paid by the University?** dropdown, select the appropriate option.



Were Registration Fees incurred or paid by the University? *

No

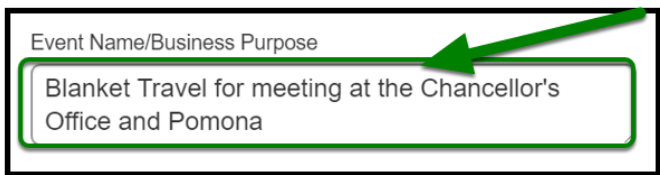
Step 8: For **Report/Trip Purpose** dropdown, select Blanket Travel (Mileage and Parking).



Report/Trip Purpose *

Blanket Travel (Mileage and Parking)

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

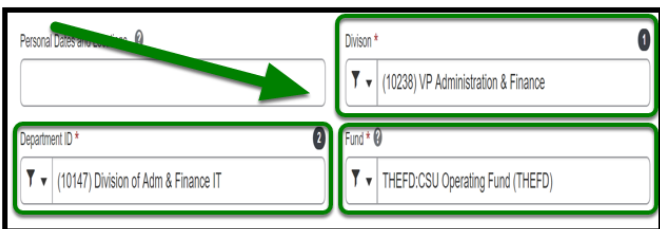


Event Name/Business Purpose

Blanket Travel for meeting at the Chancellor's Office and Pomona

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**



Personal Dates

Division *

(10238) VP Administration & Finance

Department ID *

(10147) Division of Adm & Finance IT

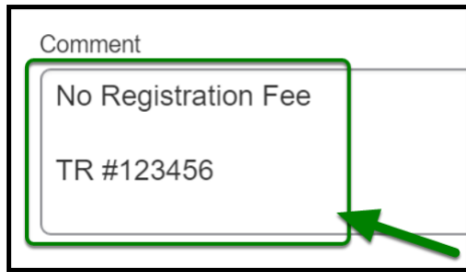
Fund *

THEFD:CSU Operating Fund (THEFD)

- “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

No Registration Fee

TR #123456

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.



Report Details ▾ Print/Share ▾ Manage Receipts ▾

REQUEST

Approved
\$300.34

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



Request Name	Request ID	Cancelled	Request Total	Approved	Remaining
Blanket Travel FY 2019-2019	36GL	No	\$300.34	\$300.34	\$300.34

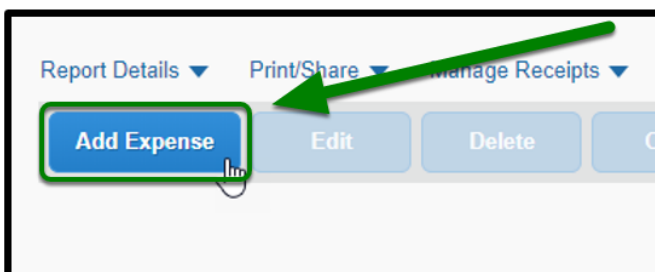
Note: Please make sure that you have the correct blanket travel request linked. If you are in multiple departments and submitted multiple travel requests, ensure that you have the correct department funding linked. If you have multiple travel requests, you will be submitting separate blanket travel expense 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

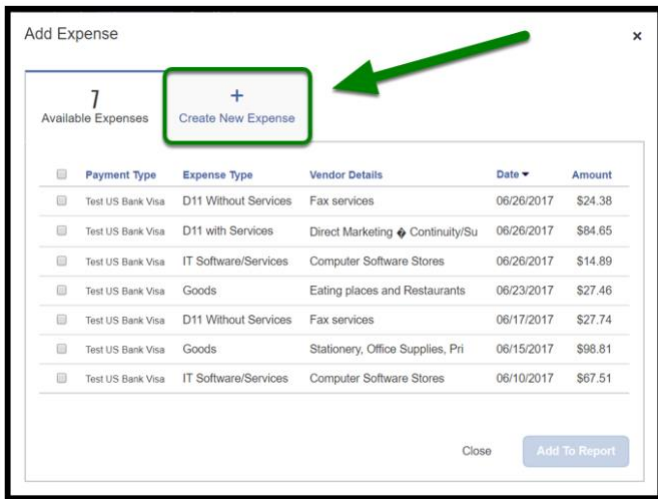
Step 1: If you are claiming mileage, click on the **Add Expense** button under Report Details.



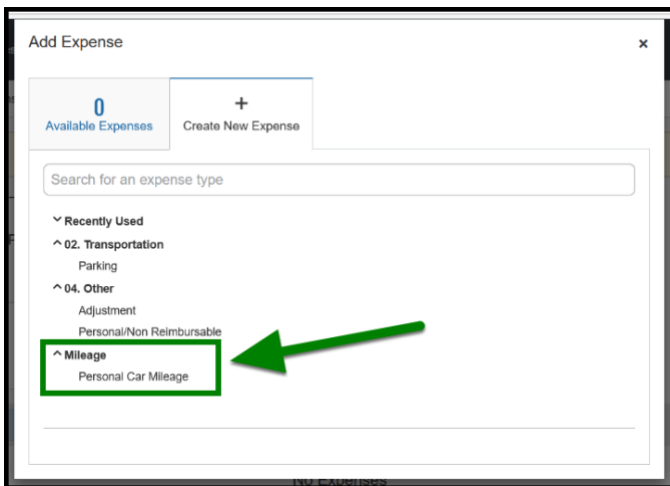
Report Details ▾ Print/Share ▾ Manage Receipts ▾

Add Expense Edit Delete

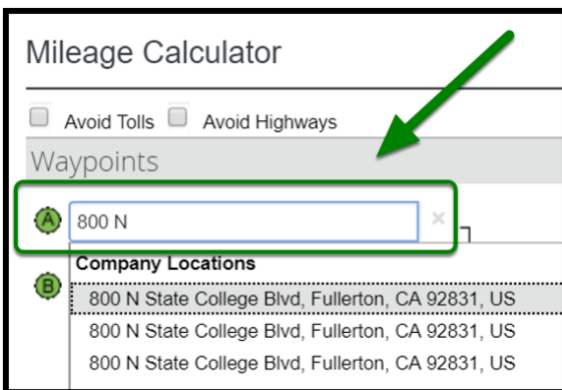
Step 2: A window will pop-up. Click on the + **Create New Expense** tab.



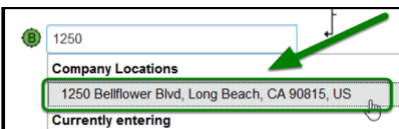
Step 3: Click on Personal Car Mileage under the Mileage section.



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**.

Avoid Tolls Avoid Highways

Waypoints

A 800 N State College Blvd, Fullerton, CA ×

B 1250 Bellflower Blvd, Long Beach, CA 9 ×

Calculate Route

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.

Avoid Tolls Avoid Highways

Waypoints

A 800 N State College Blvd, Fullerton, CA ×

B 1250 Bellflower Blvd, Long Beach, CA 9 ×

C

22.0 MI

Personal

Calculate Route Make Round Trip

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 *

07/02/2018

July 2018

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11						

Today

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 * ?

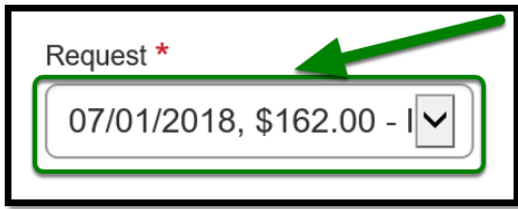
Meeting

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

Meeting at the Chancellor's Office.

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 *

07/01/2018, \$162.00 - I



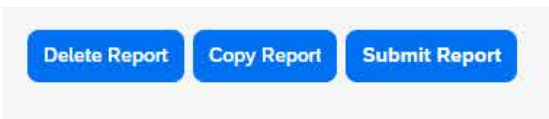
Request ID

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



Save Expense Save and Add Another Cancel

Step 16: Once you have inputted all your trips for the month, click on the **Submit Report** button.



Delete Report Copy Report Submit Report