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

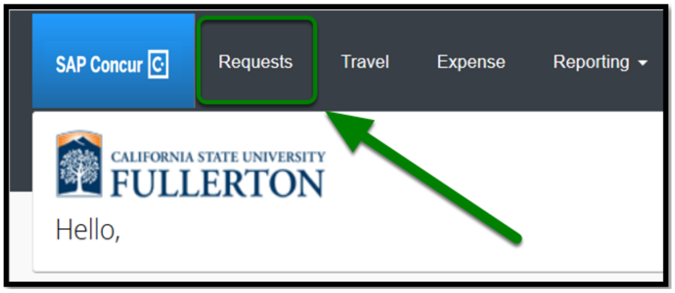
24/7 Help Line for User Support: 866-793-4040

Blanket Travel Expense Approval Workflow

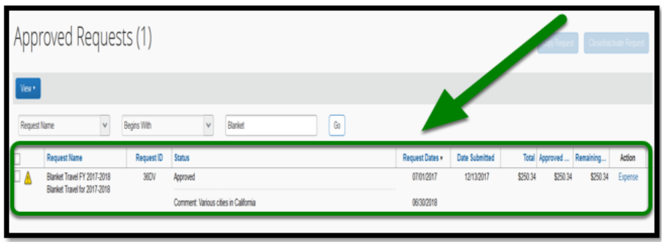
Traveler (Initiator)	Submit blanket travel expense report - How to create Blanket Travel Expense Report - How to create Blanket Travel Expense Report Header
Department Coordinator/ COE Travel	Review expense report and ensure all necessary information is inputted **** Dept. Coordinator will leave comment "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**.**

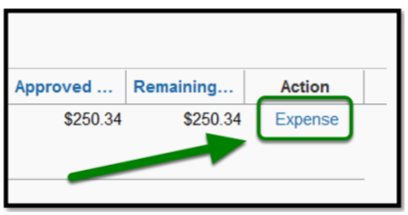


Step 2: Go to your approved **Blanket Travel Request.**



** 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.

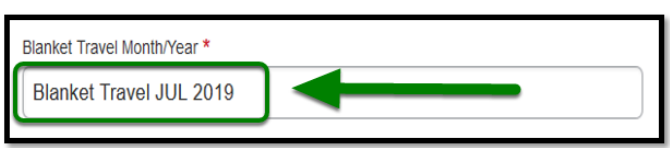


Report Header

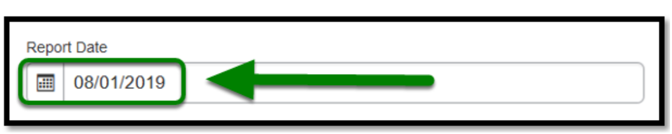
Step 1: In the Report header, change the Policy to **State Blanket Travel Policy.**

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

Ex: Blanket Travel JUL 2023

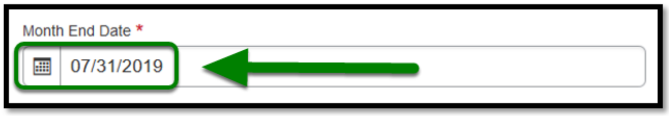


Step 3: Leave **Report Date** as the date that you are creating the report.



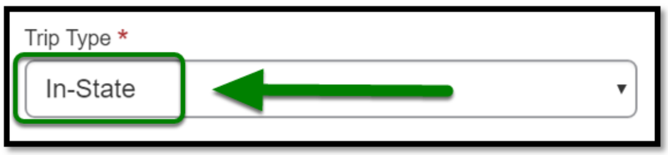
Step 4: For **Month Start Date,** change the date to the beginning of the month you are traveling.

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



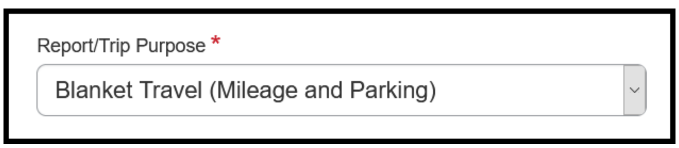
**** You will submit one report for the entire month. Expense reports are due by the 15th of the following month.****

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

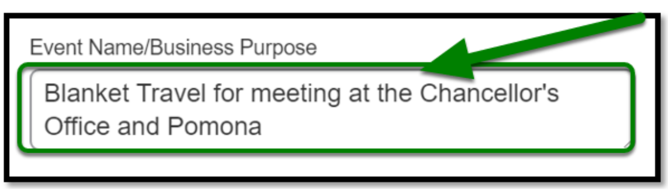


Step 7: For **Were Registration Fees incurred or paid by the University?** dropdown, select the appropriate option.

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

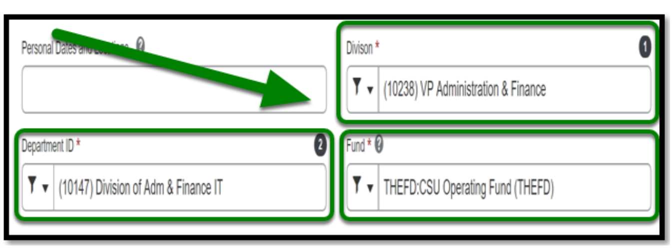


Step 9: For **Event Name / Business Purpose** field, type Blanket Travel and your business purpose for driving.



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

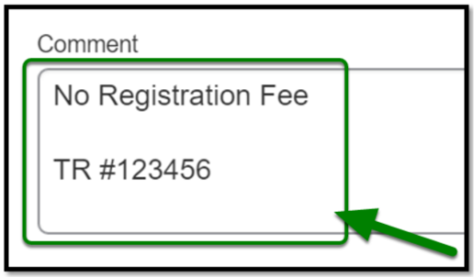
Step 11: For **Division, Department ID, and Fund**



- "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#



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.

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

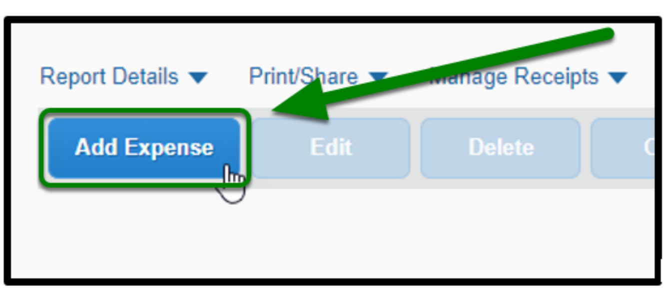
Note: Please make sure that you have the correct blanket travel request linked. If you are in multiple departments and submitted multiple travel requests, ensure that you have the correct department funding linked. If you have multiple travel requests, you will be submitting separate blanket travel expense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

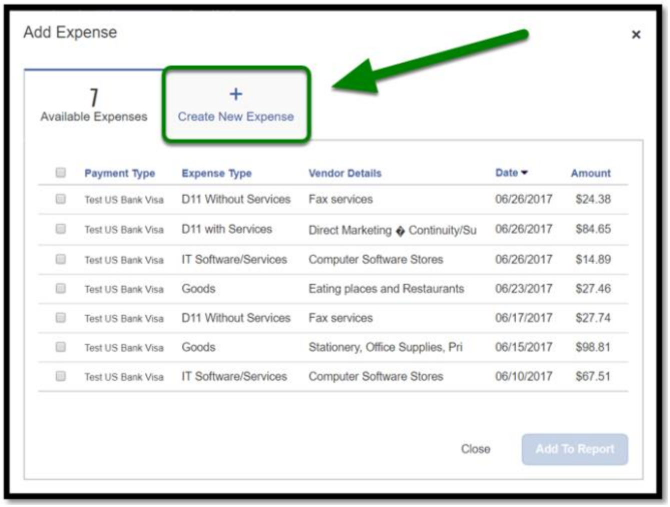
Adding Blanket Travel Expenses

Personal Car Mileage Expenses

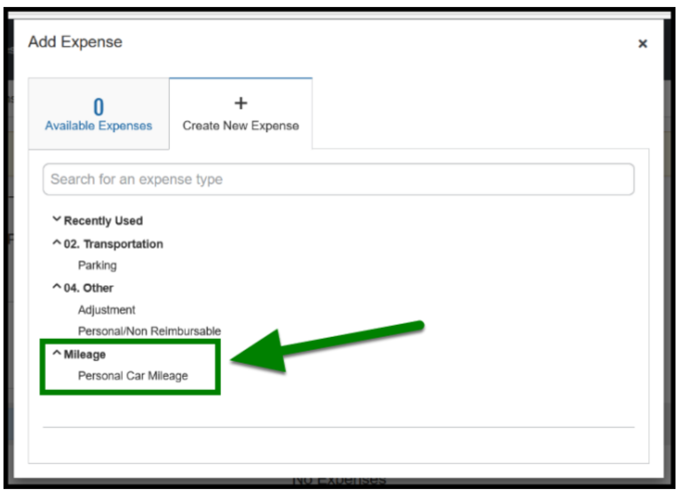
Step 1: If you are claiming mileage, click on the **Add Expense** button under Report Details.



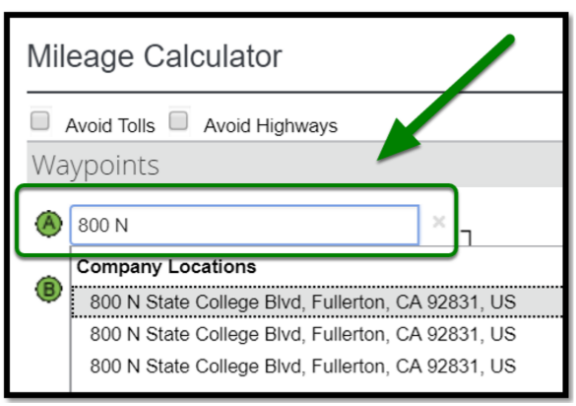
Step 2: A window will pop-up. Click on the **+ Create New Expense** tab.



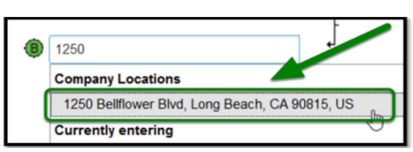
Step 3: Click on Personal Car Mileage under the Mileage section.



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



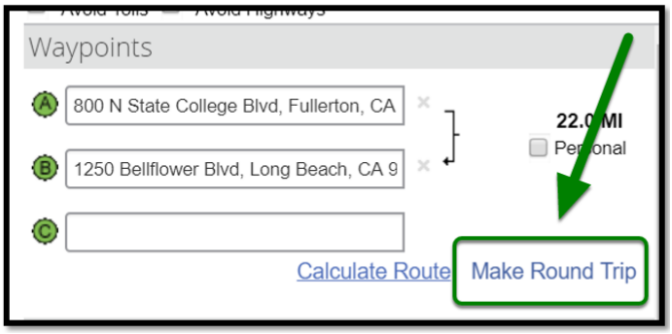
Step 5: Fill in the location you are heading to in **Point B.**



Step 6: Click on the **Calculate Route.**

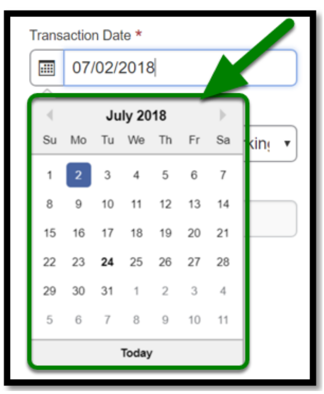
Step 7: Click on **Make Round Trip,** if you are returning to your work location.

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



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

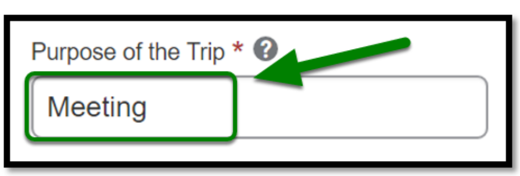
Step 9: Under **Transaction Date,** click on your travel date.



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

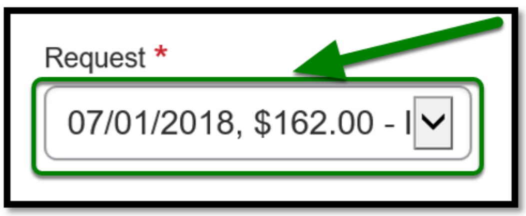
Step 11: Under **Type of Work Day,** click on the appropriate option. (If supervising, use "Supervision of Teachers")

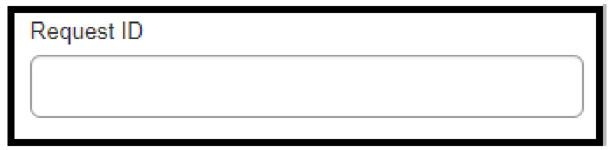
Step 12: Under **Purpose of the Trip,** enter in the purpose of your trip if it is different from your report header.



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)

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.





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

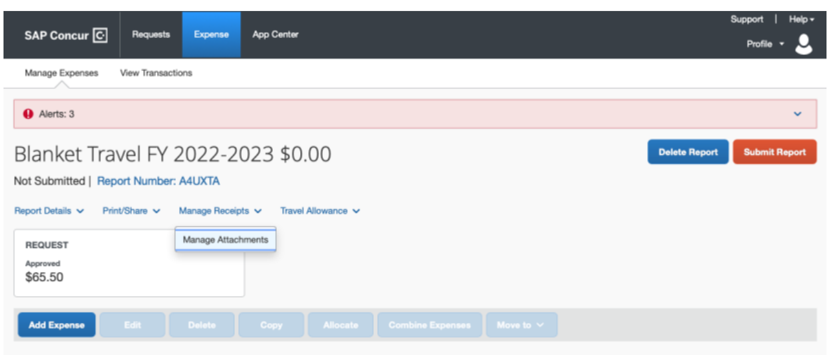
<u>Add Attachments to Expense Report:</u>

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



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