

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.

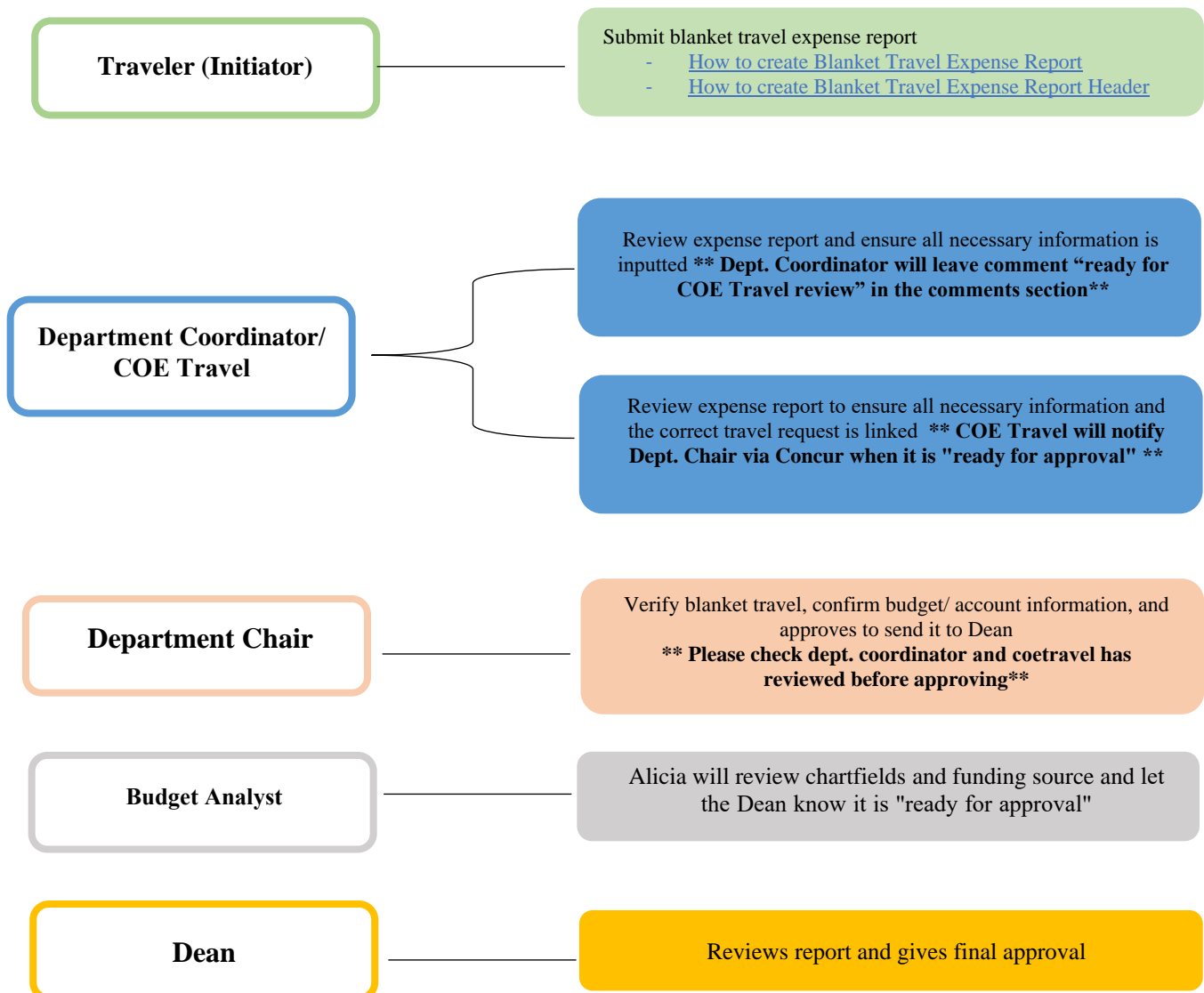
[Concur User Support](#)

[Concur Trainings](#)

[Concur Video Channel](#)

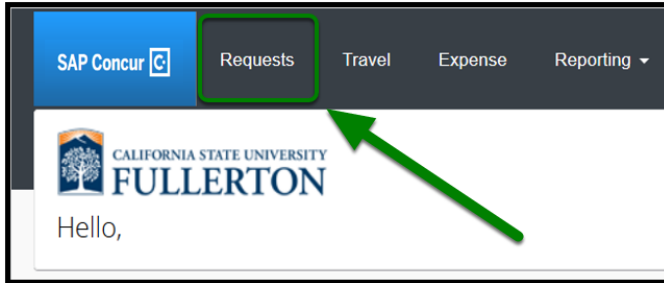
24/7 Help Line for User Support: 866-793-4040

Blanket Travel Expense Approval Workflow

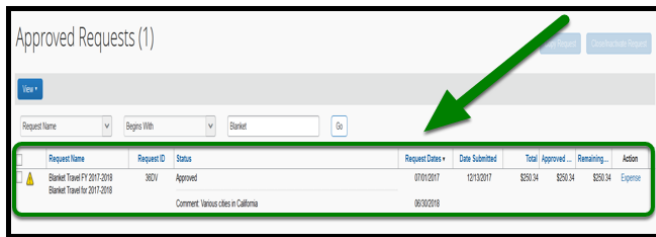


Blanket Travel Expense Report

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

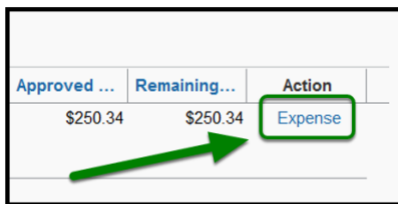


Step 2: Go to your approved **Blanket Travel Request**.



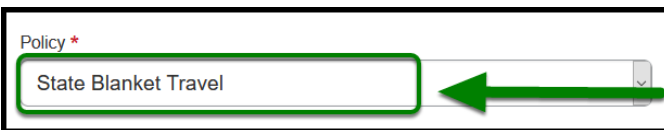
** If you have an approved Blanket Travel Request, please go to [How to link a paper travel request](#) for instructions **

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



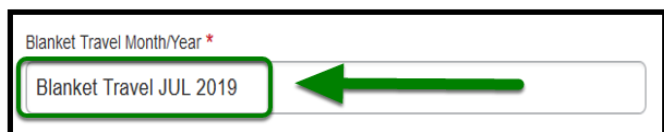
Report Header

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]**.

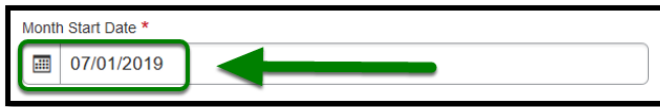
Ex: Blanket Travel JUL 2023



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.

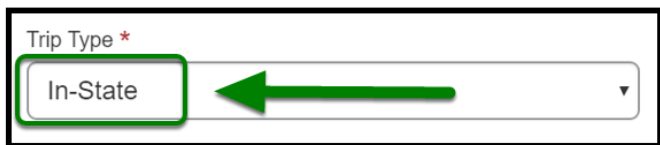


Step 5: For **Month End Date**, change the date to the end of the month you are traveling.

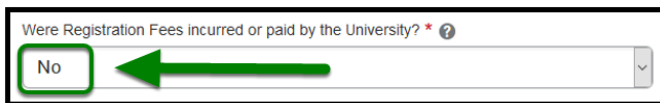


**** You will submit one report for the entire month. Expense reports are due by the 15th of the following month.****

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



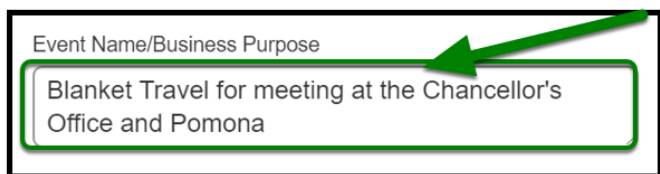
Step 7: For **Were Registration Fees incurred or paid by the University?** dropdown, select the appropriate option.



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

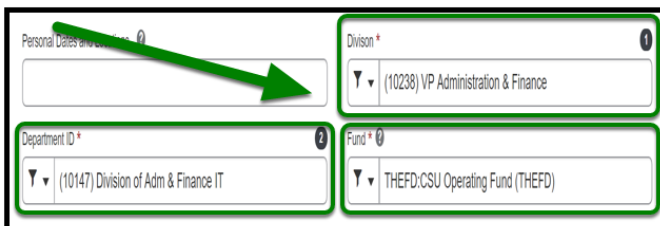


Step 9: For **Event Name / Business Purpose** field, type Blanket Travel and your business purpose for driving.



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

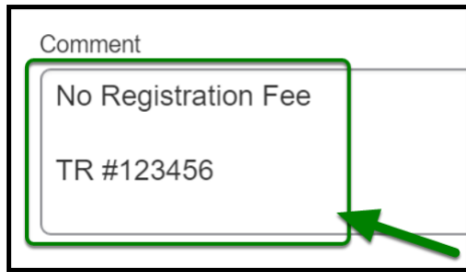
Step 11: For **Division, Department ID, and Fund**



- “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

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.



Requests

Add Remove

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

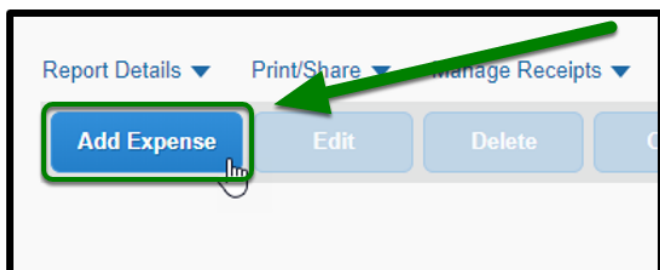
Note: Please make sure that you have the correct blanket travel request linked. If you are in multiple departments and submitted multiple travel requests, ensure that you have the correct department funding linked. If you have multiple travel requests, you will be submitting separate blanket travel expense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

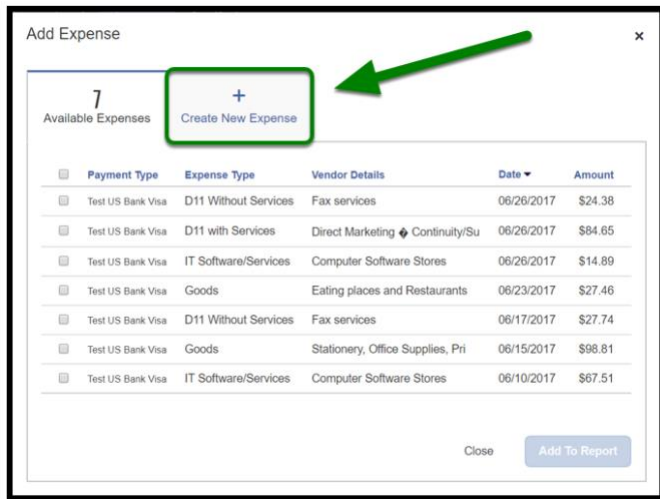
Step 1: If you are claiming mileage, click on the **Add Expense** button under Report Details.



Report Details ▾ Print/Share ▾ Manage Receipts ▾

Add Expense Edit Delete

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



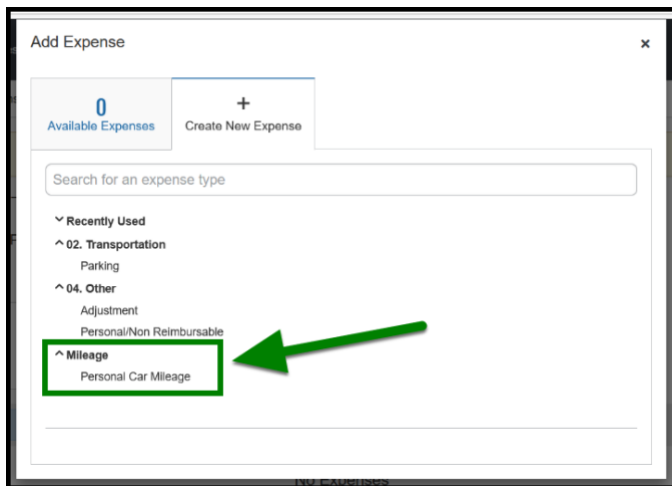
7 Available Expenses

+ Create New Expense

<input type="checkbox"/>	Payment Type	Expense Type	Vendor Details	Date	Amount
<input type="checkbox"/>	Test US Bank Visa	D11 Without Services	Fax services	06/26/2017	\$24.38
<input type="checkbox"/>	Test US Bank Visa	D11 with Services	Direct Marketing & Continuity/Su	06/26/2017	\$84.65
<input type="checkbox"/>	Test US Bank Visa	IT Software/Services	Computer Software Stores	06/26/2017	\$14.89
<input type="checkbox"/>	Test US Bank Visa	Goods	Eating places and Restaurants	06/23/2017	\$27.46
<input type="checkbox"/>	Test US Bank Visa	D11 Without Services	Fax services	06/17/2017	\$27.74
<input type="checkbox"/>	Test US Bank Visa	Goods	Stationery, Office Supplies, Pri	06/15/2017	\$96.81
<input type="checkbox"/>	Test US Bank Visa	IT Software/Services	Computer Software Stores	06/10/2017	\$67.51

Close Add To Report

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



0 Available Expenses

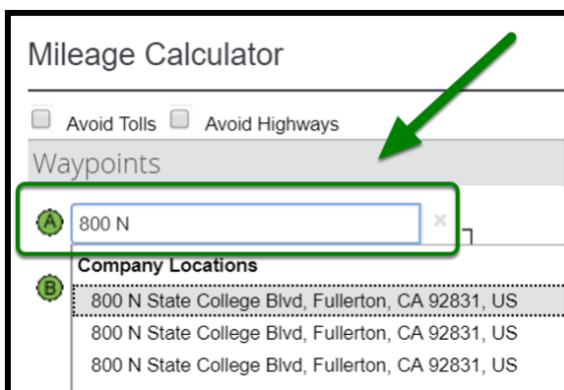
+ Create New Expense

Search for an expense type

Recently Used

- 02. Transportation
 - Parking
- 04. Other
 - Adjustment
 - Personal/Non Reimbursable
- Mileage
 - Personal Car Mileage

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



Mileage Calculator

☐ Avoid Tolls ☐ Avoid Highways

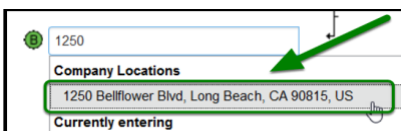
Waypoints

A 800 N

Company Locations

- B 800 N State College Blvd, Fullerton, CA 92831, US
- 800 N State College Blvd, Fullerton, CA 92831, US
- 800 N State College Blvd, Fullerton, CA 92831, US

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



B 1250

Company Locations

- 1250 Bellflower Blvd, Long Beach, CA 90815, US

Currently entering

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

Avoid Tolls ☐ Avoid Highways ☐

Waypoints

A 800 N State College Blvd, Fullerton, CA x

B 1250 Bellflower Blvd, Long Beach, CA 9 x

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 x

B 1250 Bellflower Blvd, Long Beach, CA 9 x

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.



The screenshot shows two parts of the SAP Concur interface. On the left, a 'Request' dropdown menu is open, displaying '07/01/2018, \$162.00 - I' with a downward arrow. A green arrow points to this dropdown. On the right, there is a 'Request ID' field with a text input box below it.

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



The screenshot shows a button labeled 'Save Expense' with a green arrow pointing to it. Other buttons visible are 'Save and Add Another' and 'Cancel'.

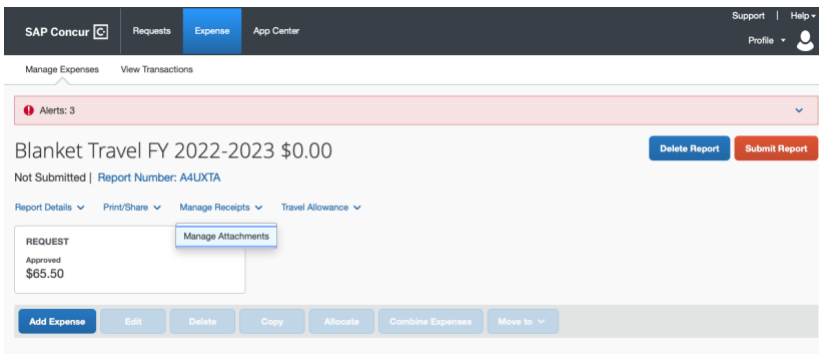
Add Attachments to Expense Report:

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

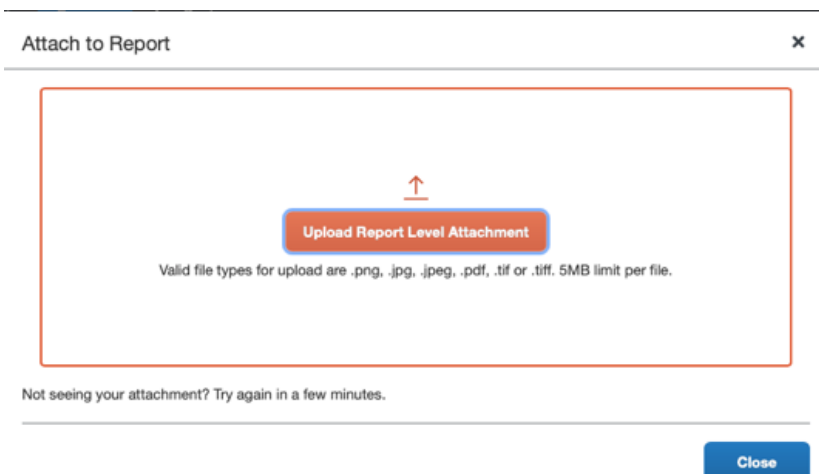
**** If the maps are not uploaded your expense report will be considered incomplete ****

Step 1: Click on manage receipts and click manage attachments



The screenshot shows the SAP Concur interface. At the top, there are tabs for 'SAP Concur', 'Requests', 'Expense', and 'App Center'. Below the tabs, there is a section for 'Manage Expenses' and 'View Transactions'. A red alert bar indicates 'Alerts: 3'. Below the alert bar, there is a section for 'Blanket Travel FY 2022-2023 \$0.00' with buttons for 'Delete Report' and 'Submit Report'. Below this, there is a section for 'Report Details' with buttons for 'Print/Share', 'Manage Receipts', and 'Travel Allowance'. A 'REQUEST' box shows 'Approved \$65.50'. A 'Manage Attachments' button is highlighted with a blue box.

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



The screenshot shows a dialog box titled 'Attach to Report' with a close button (X). Inside the dialog, there is a large red box containing an upward arrow and a button labeled 'Upload Report Level Attachment'. Below the button, it says 'Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5MB limit per file.' At the bottom of the dialog, there is a 'Close' button.