



# Concur Travel & Expense

BLANKET TRAVEL



# Blanket Travel



- Blanket Travel Overview
- Creating a Blanket Travel Request
- Creating an Expense Report (from a Blanket Request)



# Blanket Travel Overview

- **Travel Request**- Formerly known as a Request for Authorization to Travel is required to obtain preapproval of your travel prior to making any travel reservations and submitting an Expense Report.
- A Blanket Travel Request is acceptable for local travel (mileage only) with no overnight stay.
- Your Blanket Travel Request can be on a fiscal year basis and you must complete an Expense Report each month when there is travel.
- Approved Travel Requests will automatically close 60 days after the travel end date.

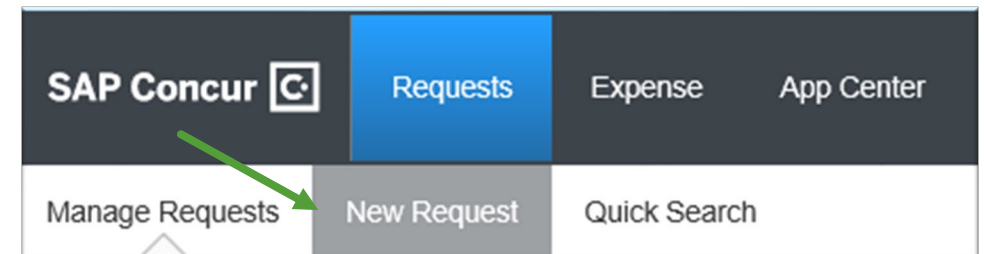
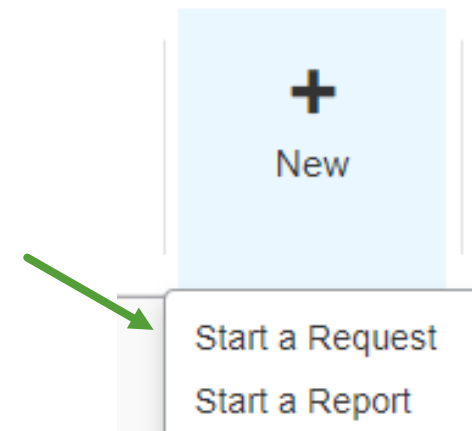
# Creating a New Travel Request

To Create a New Travel Request from the Concur Homepage, you have two options:

- On the Quick Task Bar, under **New**, click **Start a Request**

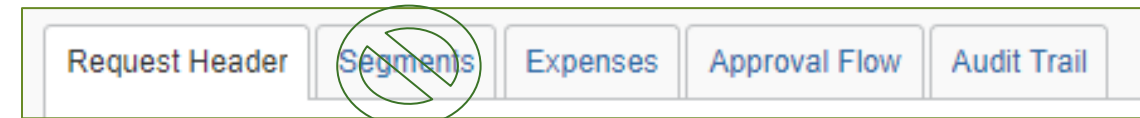
OR

- On the menu, click **Requests > New Request**



# Creating a New Travel Request (Blanket)

➤ **Travel Request consists of the following Tabs:**



- **Request Header**
- **Segments (Airfare, Car Rental, Hotel) No Segments for Blanket Travel**
- **Expenses**
- **Approval Flow**
- **Audit Trail**

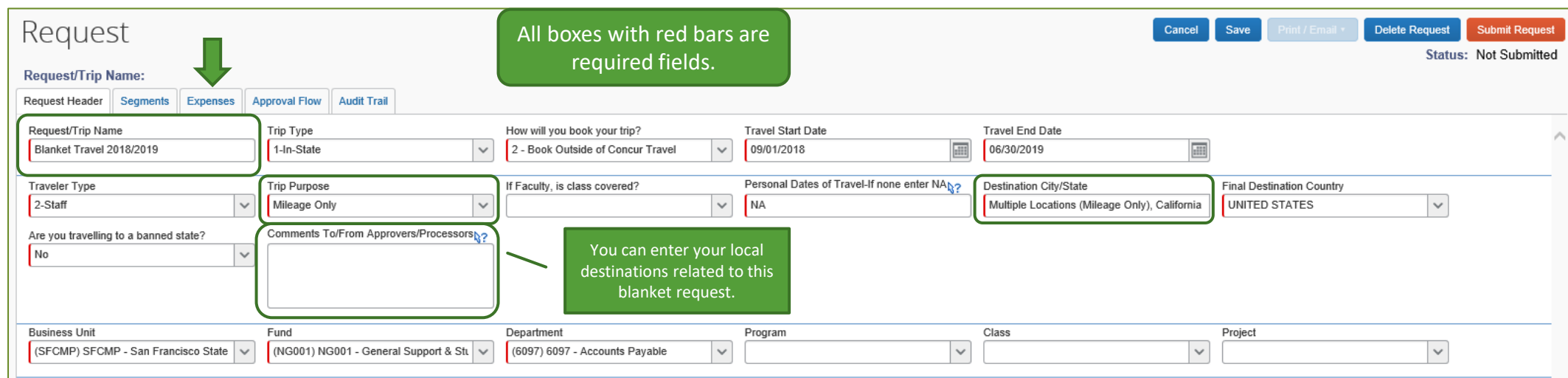


# Request Header (Blanket)

Required Fields related to Blanket	Appropriate Usage
<b>Request/Trip Name</b>	Blanket Travel and the Fiscal Year.
<b>Trip Type</b>	In State
<b>How will you book your trip?</b>	Outside Concur
<b>Travel Start and End Date</b>	End Date = June 30, 20XX
<b>Trip Purpose</b>	Mileage/ Parking Only
<b>Personal Dates of Travel</b>	NA
<b>Destination City/State</b>	Multiple Locations (Mileage Only), California

# Request Header (Blanket)

- **Step 1:** Complete **Travel Request Header**.
- **Step 2:** Once Header is complete, click on **Expenses Tab**.



The screenshot shows the 'Request' form in the Concur system. The 'Request Header' tab is active. The form contains several fields, some of which are highlighted with red bars to indicate they are required. A green arrow points to the 'Request/Trip Name' field. A green box with a red border contains the text 'All boxes with red bars are required fields.' Another green box with a red border contains the text 'You can enter your local destinations related to this blanket request.' A third green box with a red border contains the text 'Chartfield default is MDS01 & your Dept. ID is populated from HR. You can edit your chartfield.'

Request/Trip Name	Trip Type	How will you book your trip?	Travel Start Date	Travel End Date	
Blanket Travel 2018/2019	1-In-State	2 - Book Outside of Concur Travel	09/01/2018	06/30/2019	
Traveler Type	Trip Purpose	If Faculty, is class covered?	Personal Dates of Travel-If none enter NA	Destination City/State	Final Destination Country
2-Staff	Mileage Only		NA	Multiple Locations (Mileage Only), California	UNITED STATES
Are you travelling to a banned state?	Comments To/From Approvers/Processors?				
No					
Business Unit	Fund	Department	Program	Class	Project
(SFCMP) SFCMP - San Francisco State	(NG001) NG001 - General Support & St	(6097) 6097 - Accounts Payable			

# Expenses

You can provide estimates for the following additional Expense Types: **Personal Car Mileage, Ground Transportation** and **Parking/Tolls**.

01. Travel Expenses	03. Transportation	05. Hospitality
Incidentals	Ground Transportation	Hospitality
Other Accommodation	Parking/Tolls	09. Other
Team/Group Travel	04a. Meals & Incidentals - International, Alaska & Hawaii	Other Expense
02. Personal Car Mileage	04b. Meals - Domestic	Registration/Fees

- You will need to estimate your expenses for the fiscal year.
- You will need to register a car under **Profile > Profile Settings > Personal Car** in order to add **Personal Car Mileage** Expense Type to an Expense Report.





### Request 3KXN

Request/Trip Name: Blanket Mileage FY 19/20

Status: Not Submitted

Request Header Segments Expenses Approval Flow Audit Trail

+ New Expense Delete

Date	Expense Type	Amount	Requested
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Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

01. Travel Expenses	04a. Meals & Incidentals - International, Alaska & Hawaii
Incidentals	04b. Meals - Domestic
Other Accommodation	05. Hospitality
Team/Group Travel	Hospitality
02. Personal Car Mileage	09. Other
03. Transportation	Other Expense
Ground Transportation	Registration/Fees
Parking/Tolls	

TOTAL AMOUNT \$0.00 | TOTAL REQUESTED \$0.00

### Request 3KXN

Request/Trip Name: Blanket Mileage FY 19/20

Status: Not Submitted

Amount: \$664.00

Request Header Segments Expenses Approval Flow Audit Trail

+ New Expense Delete

Date	Expense Type	Amount	Requested
07/01/2019	02. Personal Car Mileage	\$464.00	\$464.00
07/01/2019	Parking/Tolls	\$200.00	\$200.00

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

01. Travel Expenses	04a. Meals & Incidentals - International, Alaska & Hawaii
Incidentals	04b. Meals - Domestic
Other Accommodation	05. Hospitality
Team/Group Travel	Hospitality
02. Personal Car Mileage	09. Other
03. Transportation	Other Expense
Ground Transportation	Registration/Fees
Parking/Tolls	

TOTAL AMOUNT \$664.00 | TOTAL REQUESTED \$664.00

Expense Type: 02. Personal Car Mileage

Travel Start Date: 07/01/2019

Travel End Date: 06/30/2020

Distance: 800

Mileage Rate: 0.58

Amount - Will automatically calculate when you hit save. 464.00 USD

Comments To/From Approvers/Processors

Save Allocate Cancel

Enter your estimated miles for the fiscal year

Expense Type: Parking/Tolls

Travel Start Date: 07/01/2019

Travel End Date: 06/30/2020

Transaction Amount: 200.00 USD

Comments To/From Approvers/Processors

Save Allocate Cancel

Enter your estimated parking/tolls for the fiscal year

- Add your **Personal Car Mileage, ground transportation and/or Parking/Tolls** estimates if applicable.
- If you need to attach a document, click on **Attachments >Attach Documents**.

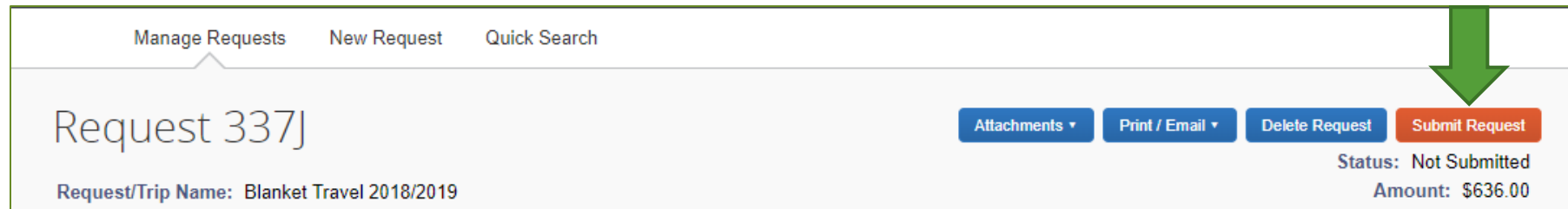
# Allocate, Delete, Modify

You have the option to allocate, delete or modify within each expense.

- **Allocate:** You have the ability to allocate a valid chartfield for a particular expense if necessary. If you will be using the same chartfield from your Travel Request Header, then no further allocation is needed.
  - You have the option to allocate by **Percentage** or **Amount**.
- **Delete:** If you want to delete the segment/expense all together.
- **Modify:** If you need to make changes to any part of the expense.

# Travel Request Submission

- After you have completed the **Request Header** and **Expenses Tabs**, you can submit your request by clicking **Submit Request**.



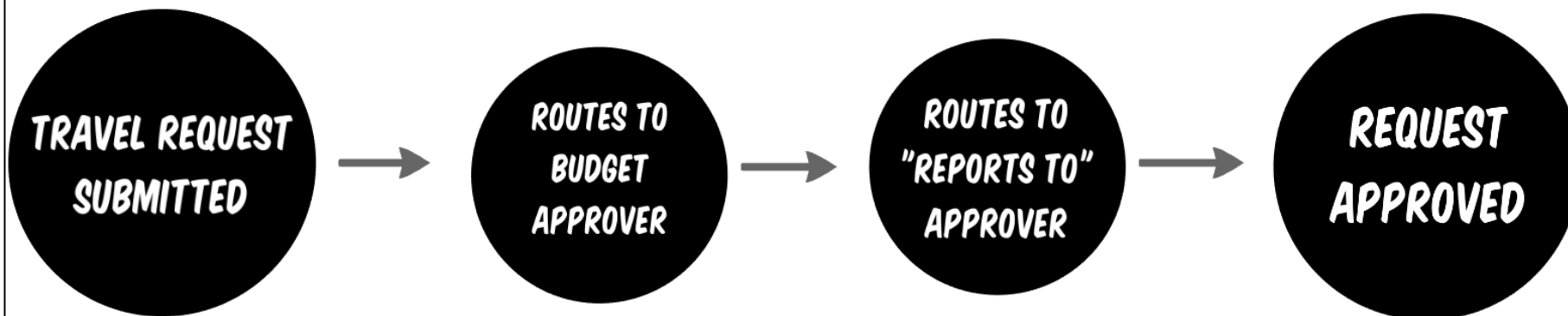
The screenshot shows the CONCUR interface for a travel request. At the top, there are navigation links: 'Manage Requests', 'New Request', and 'Quick Search'. Below this, the request is identified as 'Request 337J' with the name 'Blanket Travel 2018/2019'. On the right side, there are four buttons: 'Attachments', 'Print / Email', 'Delete Request', and 'Submit Request'. A large green arrow points down to the 'Submit Request' button. Below the buttons, the status is 'Status: Not Submitted' and the amount is 'Amount: \$636.00'.

- You can also click on Print/Email and a PDF version of the Travel Request will pop up and you can make your selection.
- If you wish to delete your entire request, you can do so by clicking **Delete Request**. You will not be able to delete a request once the request is approved. However, you can **Recall** (prior to being approved) or **Cancel** the request at anytime prior to submitting an Expense Report.

# Travel Request Approval

## ***TRAVEL REQUEST (IN-STATE) APPROVAL WORKFLOW***

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# Creating an Expense Report

- An Expense Report will need to be created and submitted for each month an expense has occurred. Please do not submit more than one expense per month.
- To make it easier, you can copy your previous month's Expense Report, make any necessary changes such as dates and amounts and submit.
- Under **Requests > Manage Requests**, find your approved Blanket Travel Request and click on **Expense** under Action.

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates ▾	Date Submitted	Total	Approved a...	Remaining ...	Action
<input type="checkbox"/>	Blanket Travel 2018/2019	337J	Approved	09/01/2018 06/30/2019		\$636.00	\$636.00	\$636.00	Expense



- Each Expense Report you submit will decrease the remaining balance of your Request. **Please note:** You can still expense if your remaining balance is zero.



# Creating an Expense Report

Create a New Expense Report

Report Header

Report Key:

Report/Trip Name:  Update Name to Blanket Travel and the month/year

Trip Type:

Travel Start Date:  Change the dates from fiscal year to start/end of month

Travel End Date:

Travel < 24 hrs?:

Are you travelling to a banned state?:

Traveler Type:

Trip Purpose:

Personal Dates of Travel-if none enter NA:

Is this trip going to be reimbursed by the Chancellor's Office?:

Comments To/From Approvers/Processors:

Business Unit:

Fund:

Department:

Program:

Class:

Project:

Requests

Blanket Travel Request should be linked

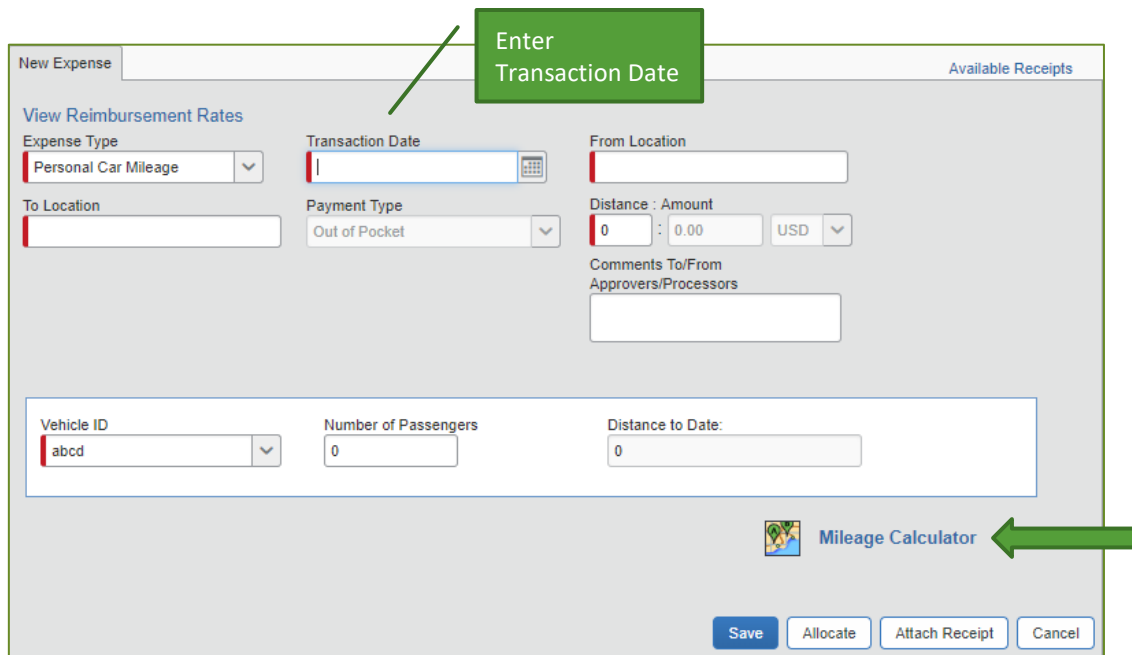
<input type="checkbox"/>	Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining
<input type="checkbox"/>	Blanket Travel 2018/2019	337J	No	\$636.00	\$636.00	\$636.00

➤ Once you fill out the **Expense Header**, click on **Next** to start entering your expenses.

# Adding Expenses

- Click on **Personal Car Mileage** Expense Type. Enter **Transaction Date**, then click on **Mileage Calculator**.
- Enter destination **Waypoints**, then click **Add Mileage to Expenses**. Then **Save**.

Enter Personal Car Mileage expense for each day of travel.



New Expense Available Receipts

View Reimbursement Rates

Expense Type: Personal Car Mileage

Transaction Date: [ ]

From Location: [ ]

To Location: [ ]

Payment Type: Out of Pocket

Distance : Amount: 0 : 0.00 USD

Comments To/From Approvers/Processors: [ ]

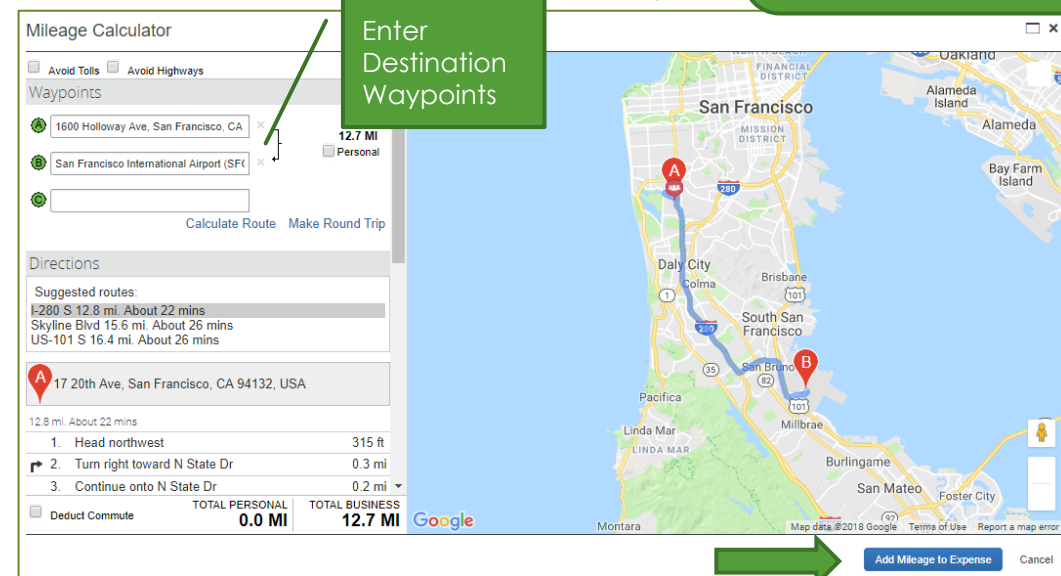
Vehicle ID: abcd

Number of Passengers: 0

Distance to Date: 0

Mileage Calculator

Save Allocate Attach Receipt Cancel



Mileage Calculator

Avoid Tolls Avoid Highways

Waypoints

1600 Holloway Ave, San Francisco, CA 12.7 MI

San Francisco International Airport (SFO) Personal

Calculate Route Make Round Trip

Directions

Suggested routes:

- I-280 S 12.8 mi. About 22 mins
- Skyline Blvd 15.6 mi. About 26 mins
- US-101 S 16.4 mi. About 26 mins

A 17 20th Ave, San Francisco, CA 94132, USA

12.8 mi. About 22 mins

- Head northwest 315 ft
- Turn right toward N State Dr 0.3 mi
- Continue onto N State Dr 0.2 mi

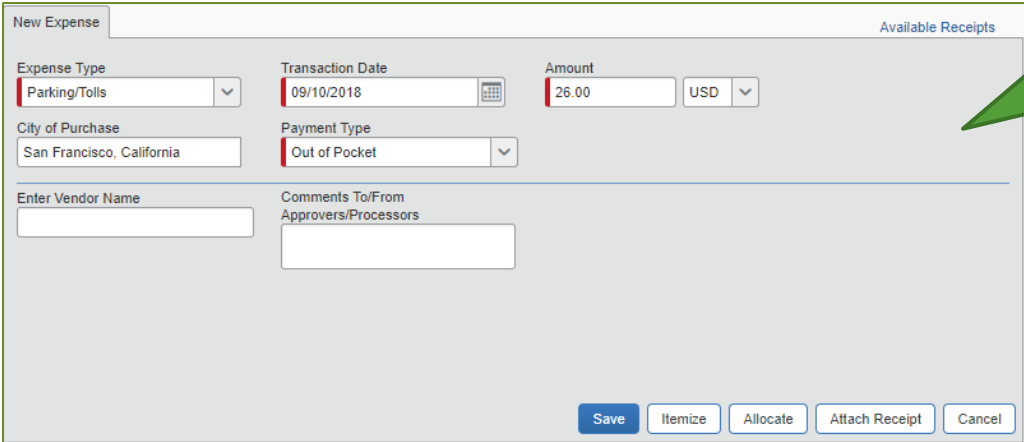
Deduct Commute

TOTAL PERSONAL 0.0 MI TOTAL BUSINESS 12.7 MI

Add Mileage to Expense Cancel

# Adding Expenses

- Click on **Parking/Tolls, or Ground Transportation** Expense Type/s if applicable to your travel. Provide all information including any required fields. Click **Save**.
- If the transaction total is \$75 or more, please make sure to attach a receipt. You can also **Allocate** if needed.



New Expense Available Receipts

Expense Type  
Parking/Tolls

Transaction Date  
09/10/2018

Amount  
26.00 USD

City of Purchase  
San Francisco, California

Payment Type  
Out of Pocket

Enter Vendor Name

Comments To/From Approvers/Processors

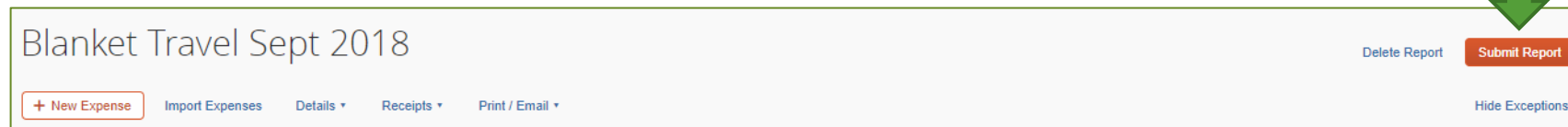
Save Itemize Allocate Attach Receipt Cancel

Enter Parking/Tolls expense for each day of travel.



# Expense Report Submission

- Once all your expenses for the month have been entered, click **Submit Report**.
- Expense Reports must be submitted within 60 days from the Travel End date and you can only submit the Expense Report after the Travel End Date has passed.



- All red exception flags must be cleared before the report can be submitted. Yellow flags are considered warnings, but will not stop the submittal process.
- To see who is approving your reports or to see where your report is in the workflow, open the Expense Report, click **Details** then click **Approval Flow**.
- Expense Report approval workflow will go to the “Reports to” Approver, then the Budget Approver for approval. It will then route to AP Travel Desk for final approval and processing.



# Need More Information?



- For more in depth information regarding Concur Travel & Expense, please check out the Concur Resources at:  
<https://www.csus.edu/administration-business-affairs/internal/concur-travel/>
- Questions? Email [sacstatetravel@csus.edu](mailto:sacstatetravel@csus.edu)