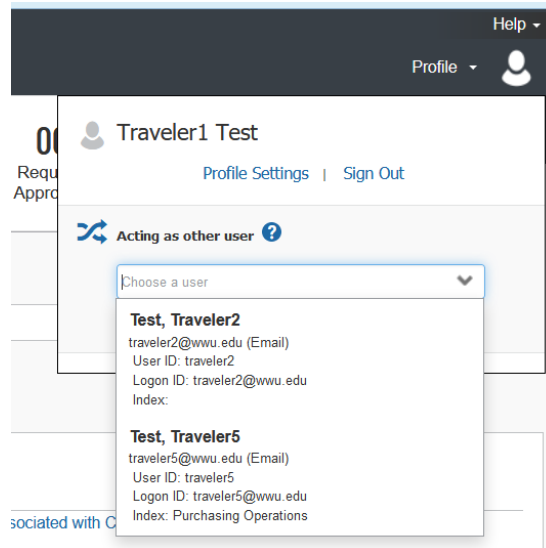
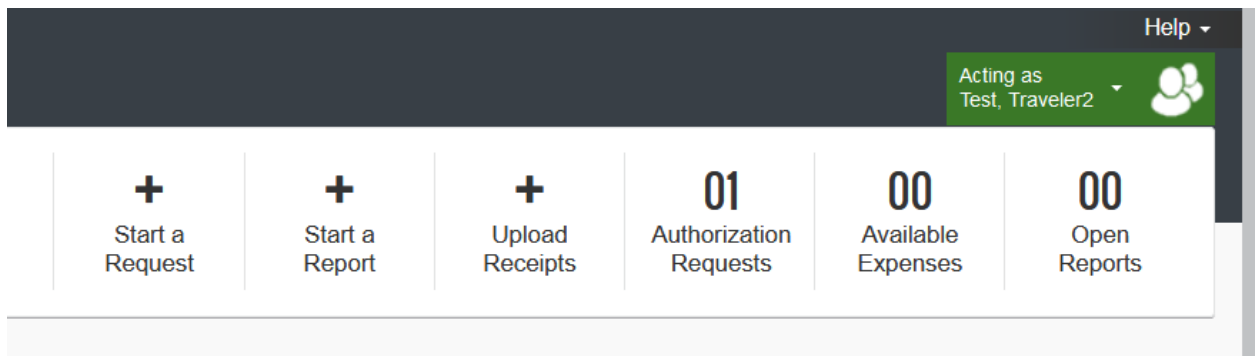


Create a mileage or stand-alone Expense Report

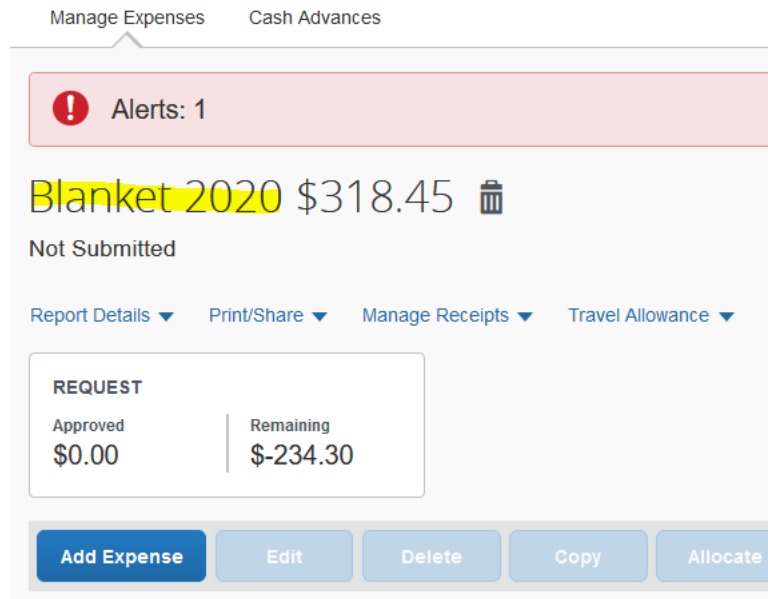
1. Log in to [Concur](#). You may need to log in through [MyWestern](#) with your universal ID first.
 - **Travelers skip to #2**
 - **Delegates Only:** Click **Profile** on the upper-right of your dashboard and begin typing the traveler's name to search and select from the list field under **Acting as other user**:



- **If you do not have the Acting as other User option or the traveler's name does not come up in the search, the traveler must assign you as a delegate in their Profile Settings.** Travel Services can also enable delegate permissions.
- Click **Start Session**. You are now acting as a delegate for this user, shown by the green label "Acting as . . .":




2. **Generate your expense report directly from your approved Request.** *If no request was completed for in state daytrips, or traveler authorized via another employee's Group TA Request, click **Start a Report**.*
3. **Report Header information** is copied from the Request and needs to be updated (or entered for a stand-alone expense report) Click on the Trip Name to edit:



Manage Expenses Cash Advances

Alerts: 1

Blanket 2020 \$318.45 

Not Submitted

Report Details ▼ Print/Share ▼ Manage Receipts ▼ Travel Allowance ▼

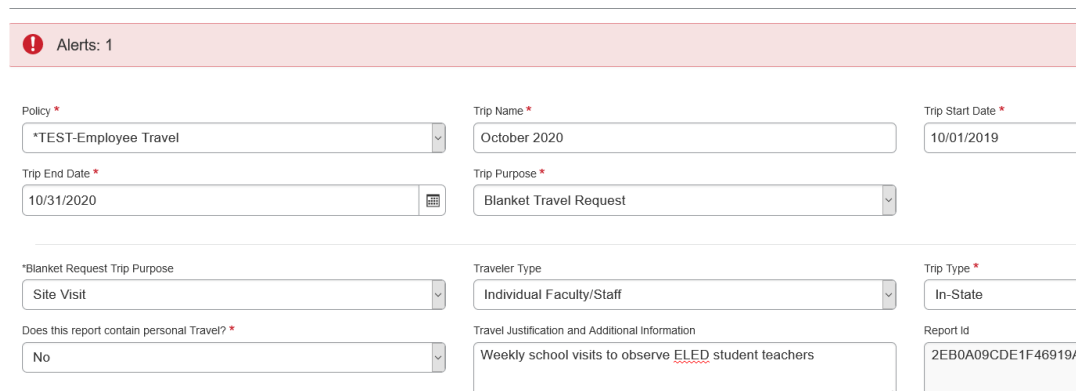
REQUEST	
Approved	Remaining
\$0.00	\$-234.30

Add Expense Edit Delete Copy Allocate

4. Edit or enter Header Information

- a. Trip Name
- b. Trip Start and End Dates (for repeated mileage enter first/last days of the month or travel span)
- c. ***If authorized via another employee's group TA Request***, enter the employee's name and Request ID # in the travel justification & additional information field.

Report Header
October 2020 | \$318.45



Alerts: 1

Policy *
*TEST-Employee Travel

Trip Name *
October 2020

Trip Start Date *
10/01/2019

Trip End Date *
10/31/2020

Trip Purpose *
Blanket Travel Request

*Blanket Request Trip Purpose
Site Visit

Traveler Type
Individual Faculty/Staff

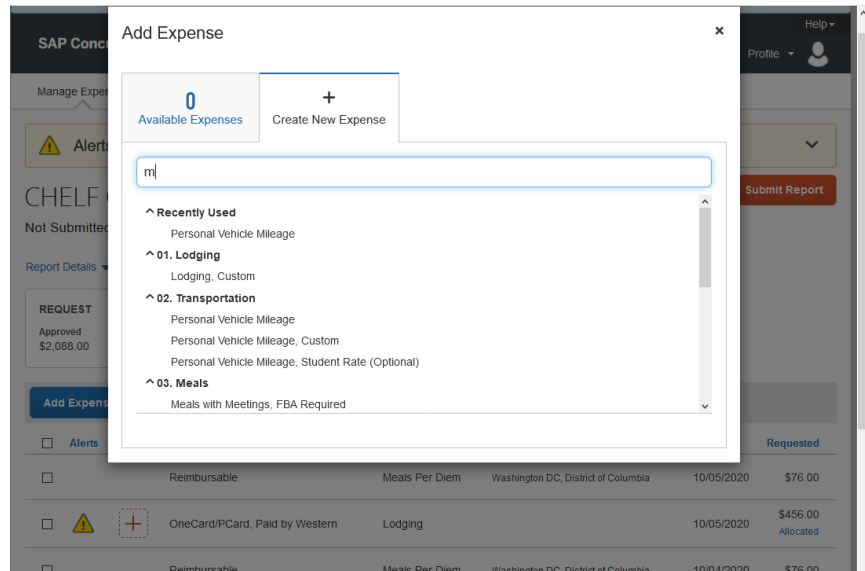
Trip Type *
In-State

Does this report contain personal Travel? *
No

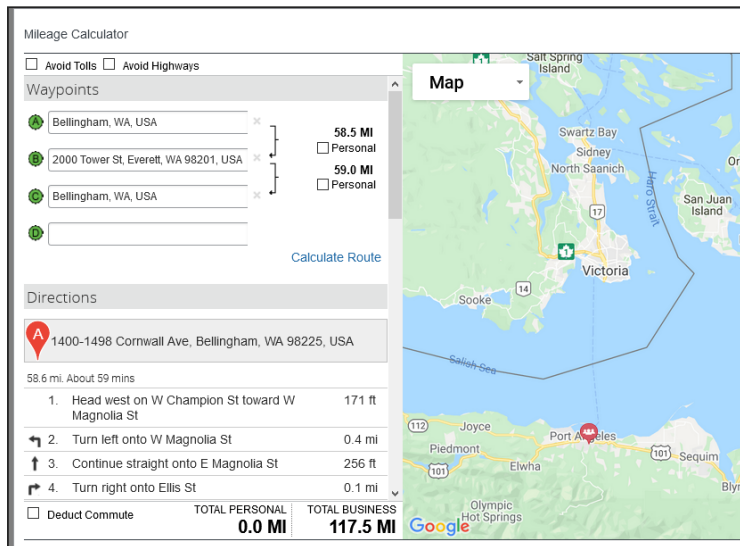
Travel Justification and Additional Information
Weekly school visits to observe ELED student teachers

Report Id
2EB0A09CDE1F46919F

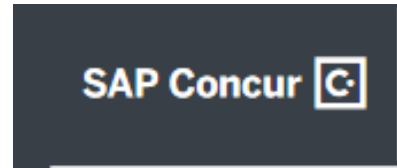
5. Click **Save** on the bottom right
6. Click **blue Add Expense button**. Search Personal Vehicle Mileage in the Expense Type window or select from the list:



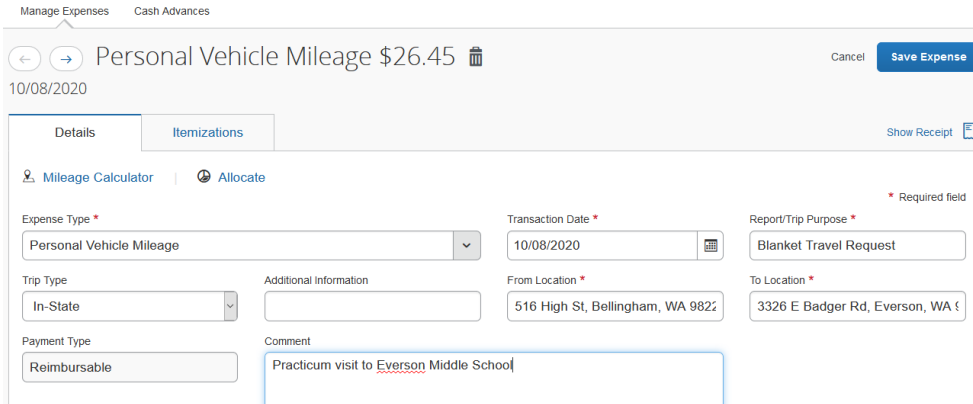
- a. This opens the Mileage Calculator/Google Maps. Enter Waypoints and click Calculate Route.
- b. Click Make Round Trip if applicable. Add multiple stops as needed for that day's trip. To accurately calculate mileage with ferry trips, include ferry terminal stops.




- c. Click Add Mileage to Expense button on bottom right
- d. Enter Transaction Date



- e. Add a comment to describe the trip, i.e. Practicum site visit to Ferndale High School to observe student Chris Smith:



Manage Expenses Cash Advances

Personal Vehicle Mileage \$26.45  Cancel Save Expense

10/08/2020 Show Receipt

Details Itemizations

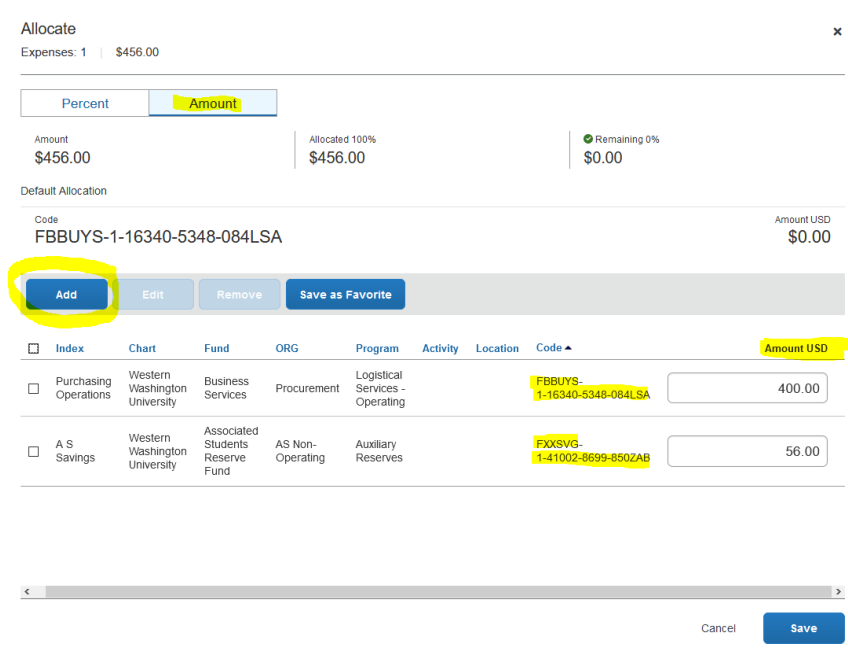
[Mileage Calculator](#) | [Allocate](#)

Expense Type * Personal Vehicle Mileage Transaction Date * 10/08/2020 Report/Trip Purpose * Blanket Travel Request

Trip Type In-State Additional Information From Location * 516 High St, Bellingham, WA 9822 To Location * 3326 E Badger Rd, Everson, WA 9

Payment Type Reimbursable Comment Practicum visit to Everson Middle School

- f. Click Save Expense or Save and Add Another
7. Repeat for each mileage expense. **Include all mileage trips on the same Expense Report.**
- Copy a mileage expense by clicking the box to the left and selecting Copy button above. The system automatically assigns next day's date to the copied expense. Edit transaction dates as needed.
 - To Change or Split Funding:** from the Add Expense Screen, check the box of the Expense(s) and click the **Allocate** Button above, or use the **Allocate** link found in the expense. **Use the Add button to enter one or more funding sources.** If needed, split by Percent or Amount:



Allocate Expenses: 1 | \$456.00

Percent Amount

Amount \$456.00 Allocated 100% \$456.00 Remaining 0% \$0.00

Default Allocation

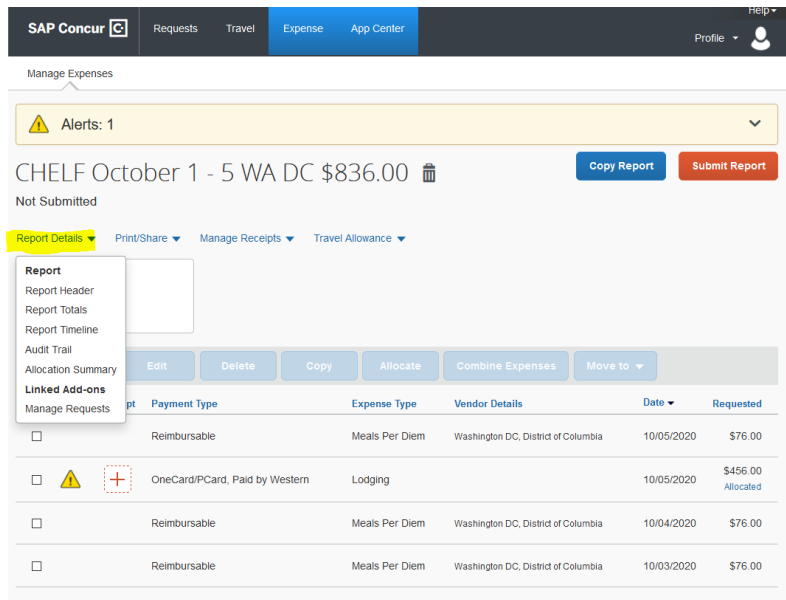
Code FBBUYS-1-16340-5348-084LSA Amount USD \$0.00

Add Edit Remove Save as Favorite

<input type="checkbox"/>	Index	Chart	Fund	ORG	Program	Activity	Location	Code	Amount USD
<input type="checkbox"/>	Purchasing Operations	Western Washington University	Business Services	Procurement	Logistical Services - Operating			FBBUYS-1-16340-5348-084LSA	400.00
<input type="checkbox"/>	A S Savings	Western Washington University	Associated Students Reserve Fund	AS Non-Operating	Auxiliary Reserves			FXXSVG-1-41002-8699-850ZAB	56.00

Cancel Save

9. **Add other expenses and receipts as needed**
10. **Click Report Details to review** and edit if necessary:
 1. Report Header
 2. Report Totals- shows breakdown of reimbursable vs non-reimbursable amounts
 3. Report Timeline to view Approval Flow
 4. Allocation Summary



The screenshot shows the SAP Concur 'Manage Expenses' interface. At the top, there are navigation tabs for 'Requests', 'Travel', 'Expense', and 'App Center'. Below the navigation, there is a header for 'Manage Expenses' with an alert icon and 'Alerts: 1'. The main content area displays a report titled 'CHELF October 1 - 5 WA DC \$836.00' with a trash icon and buttons for 'Copy Report' and 'Submit Report'. Below the report title, it says 'Not Submitted'. There are several dropdown menus: 'Report Details' (highlighted), 'Print/Share', 'Manage Receipts', and 'Travel Allowance'. The 'Report Details' dropdown menu is open, showing options: 'Report', 'Report Header', 'Report Totals', 'Report Timeline', 'Audit Trail', 'Allocation Summary', 'Linked Add-ons', and 'Manage Requests'. Below the dropdown, there are buttons for 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. At the bottom, there is a table with columns: 'Payment Type', 'Expense Type', 'Vendor Details', 'Date', and 'Requested'.

Payment Type	Expense Type	Vendor Details	Date	Requested
Reimbursable	Meals Per Diem	Washington DC, District of Columbia	10/05/2020	\$76.00
OneCard/PCard, Paid by Western	Lodging		10/05/2020	\$456.00 Allocated
Reimbursable	Meals Per Diem	Washington DC, District of Columbia	10/04/2020	\$76.00
Reimbursable	Meals Per Diem	Washington DC, District of Columbia	10/03/2020	\$76.00

11. **Click Orange Submit Report** button on the top right. Delegates will see a **Notify Employee** button instead.