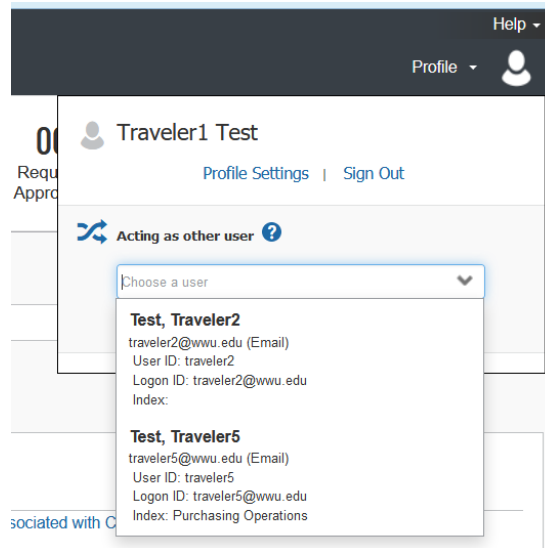
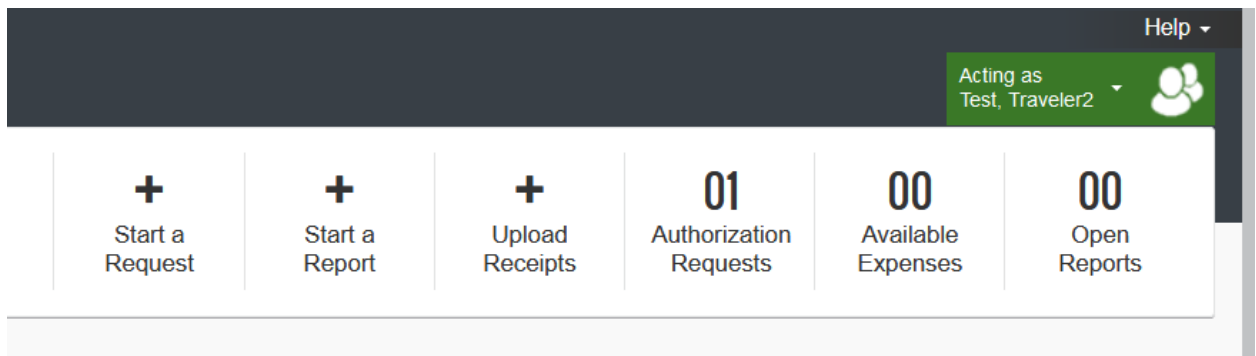


## Create a monthly Blanket Mileage Expense Report

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**:

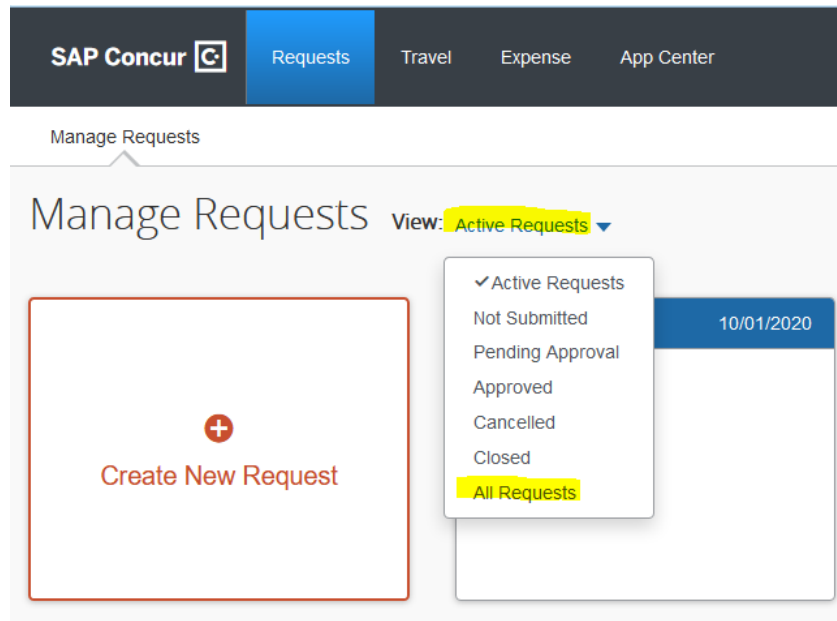


- **If you do not have the Acting as other User option or the traveler's name does not come up in the search, the traveler must assign you as a delegate in their Profile Settings.** Travel Services can also enable delegate permissions.
- Click **Start Session**. You are now acting as a delegate for this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



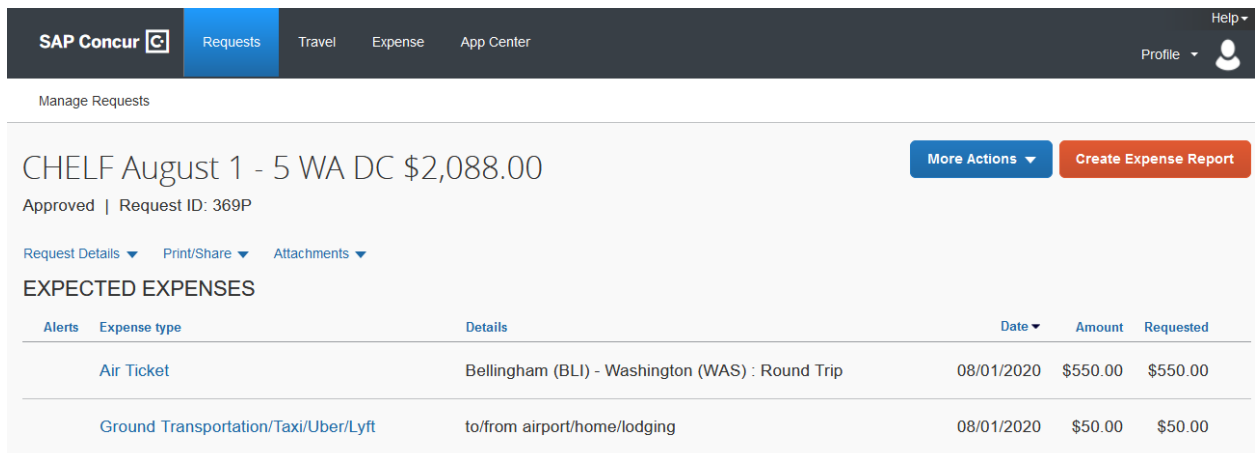
2. Click the Requests tab **at the top of the screen**. Always start with the approved Request.

3. Click the Request to open. *If you do not see the related trip Request, you may need to change your View from Active Requests to All Requests or Approved Requests:*



The screenshot shows the SAP Concur 'Manage Requests' interface. The top navigation bar includes 'Requests', 'Travel', 'Expense', and 'App Center'. Below the navigation, the page title is 'Manage Requests' and the current view is set to 'Active Requests'. A dropdown menu is open, showing options: 'Active Requests', 'Not Submitted', 'Pending Approval', 'Approved', 'Cancelled', 'Closed', and 'All Requests'. The 'All Requests' option is highlighted in yellow. A red box highlights a 'Create New Request' button on the left side of the page.

4. Click the **Create Expense Report Button** at the top right within the approved Request:



The screenshot shows the SAP Concur 'Request Details' page for an approved request. The request title is 'CHELF August 1 - 5 WA DC \$2,088.00' and the status is 'Approved | Request ID: 369P'. At the top right, there are two buttons: 'More Actions' and 'Create Expense Report'. Below the title, there are links for 'Request Details', 'Print/Share', and 'Attachments'. The main content area is titled 'EXPECTED EXPENSES' and contains a table with the following data:

Alerts	Expense type	Details	Date	Amount	Requested
	Air Ticket	Bellingham (BLI) - Washington (WAS) : Round Trip	08/01/2020	\$550.00	\$550.00
	Ground Transportation/Taxi/Uber/Lyft	to/from airport/home/lodging	08/01/2020	\$50.00	\$50.00

5. **Report Header information** is copied from the Blanket Request and needs to be updated for each report. Click on the Blanket Name or select Report Header under Report Details:

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

- **Edit Header Information from Blanket to Correct Month (see below):**
  - Trip Name
  - Trip Start and End Dates
  - Select a Blanket Request Trip Purpose from the drop-down list
  - Update the Travel Justification information

Report Header

October 2020 | \$318.45

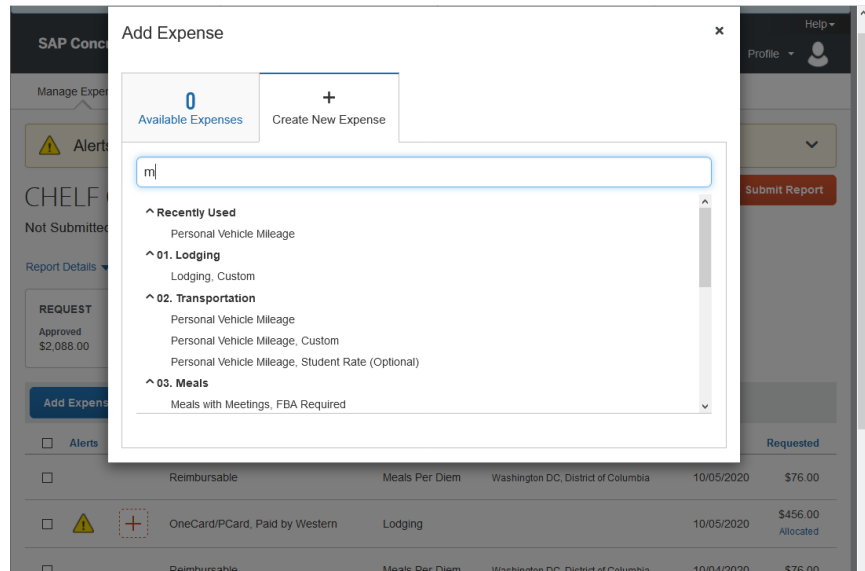
! Alerts: 1

<p><small>Policy *</small></p> <input style="width: 95%;" type="text" value="*TEST-Employee Travel"/>	<p><small>Trip Name *</small></p> <input style="width: 95%;" type="text" value="October 2020"/>	<p><small>Trip Start Date *</small></p> <input style="width: 95%;" type="text" value="10/01/2019"/>
<p><small>Trip End Date *</small></p> <input style="width: 95%;" type="text" value="10/31/2020"/>	<p><small>Trip Purpose *</small></p> <input style="width: 95%;" type="text" value="Blanket Travel Request"/>	

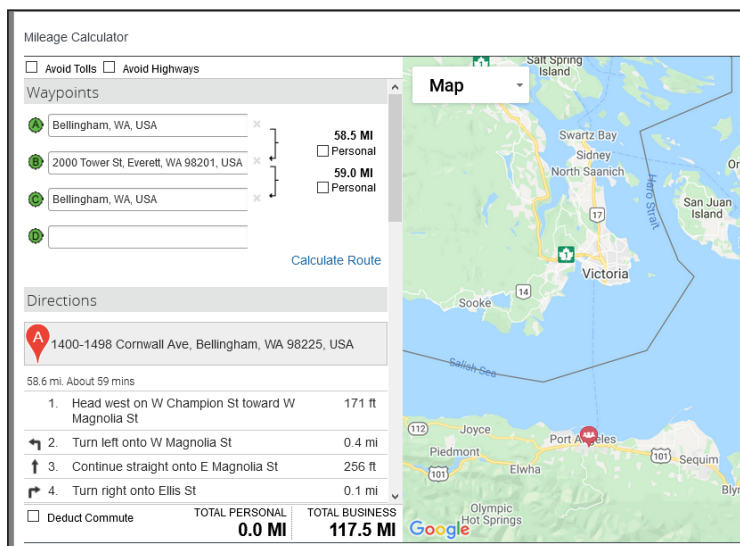
<p><small>*Blanket Request Trip Purpose</small></p> <input style="width: 95%;" type="text" value="Site Visit"/>	<p><small>Traveler Type</small></p> <input style="width: 95%;" type="text" value="Individual Faculty/Staff"/>	<p><small>Trip Type *</small></p> <input style="width: 95%;" type="text" value="In-State"/>
<p><small>Does this report contain personal Travel? *</small></p> <input style="width: 95%;" type="text" value="No"/>	<p><small>Travel Justification and Additional Information</small></p> <input style="width: 95%; height: 20px;" type="text" value="Weekly school visits to observe &lt;u&gt;ELED&lt;/u&gt; student teachers"/>	<p><small>Report Id</small></p> <input style="width: 95%;" type="text" value="2EB0A09CDE1F46919A"/>

6. **Click Save** on the bottom right

7. **Click blue Add Expense button.** Search Personal Vehicle Mileage in the Expense Type window or select from the list:

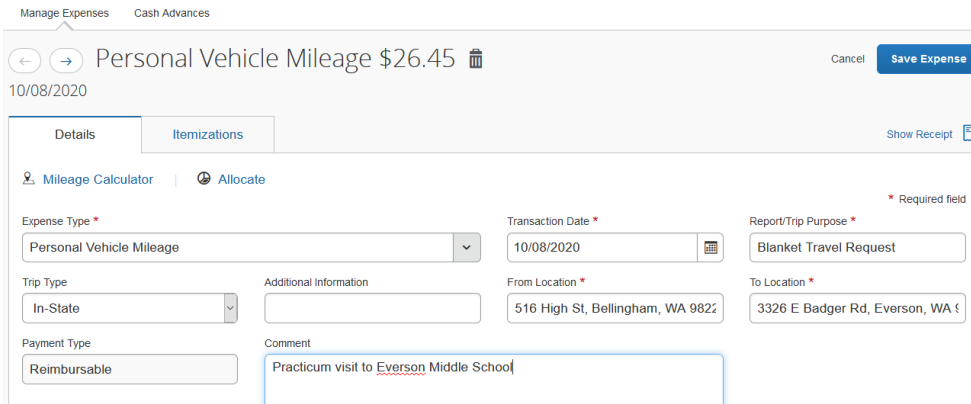


- This opens the Mileage Calculator/Google Maps. Enter Waypoints and click Calculate Route.
- Click Make Round Trip if applicable. Add multiple stops as needed for that day's trip. To accurately calculate mileage with ferry trips, include ferry terminal stops.



- Click Add Mileage to Expense button on bottom right
- 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

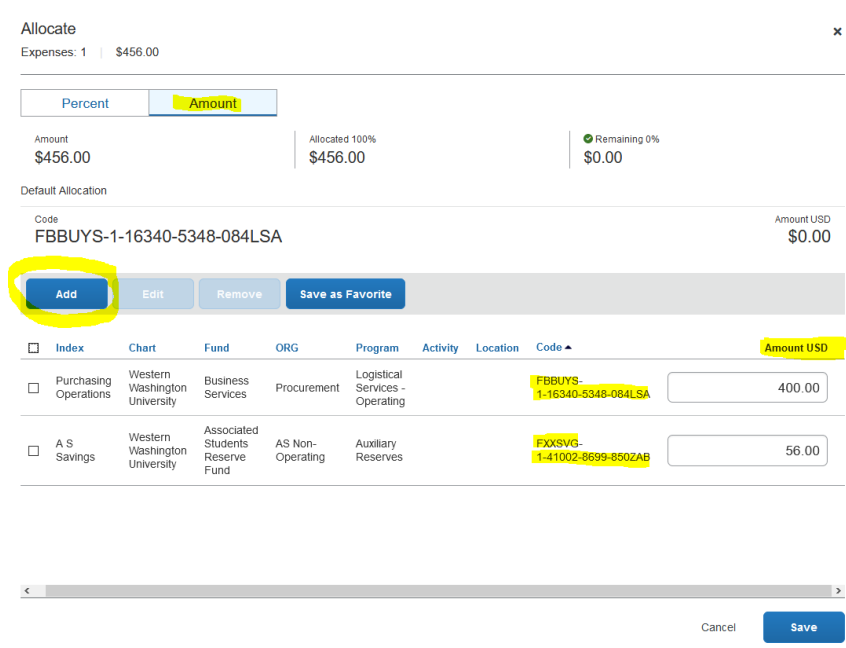
[Mileage Calculator](#) [Allocate](#)

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 982z To Location \* 3326 E Badger Rd, Everson, WA

Payment Type Reimbursable Comment Practicum visit to Everson Middle School

- f. Click Save Expense or Save and Add Another
8. 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 copied expense. Edit transaction dates as needed.
9. **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

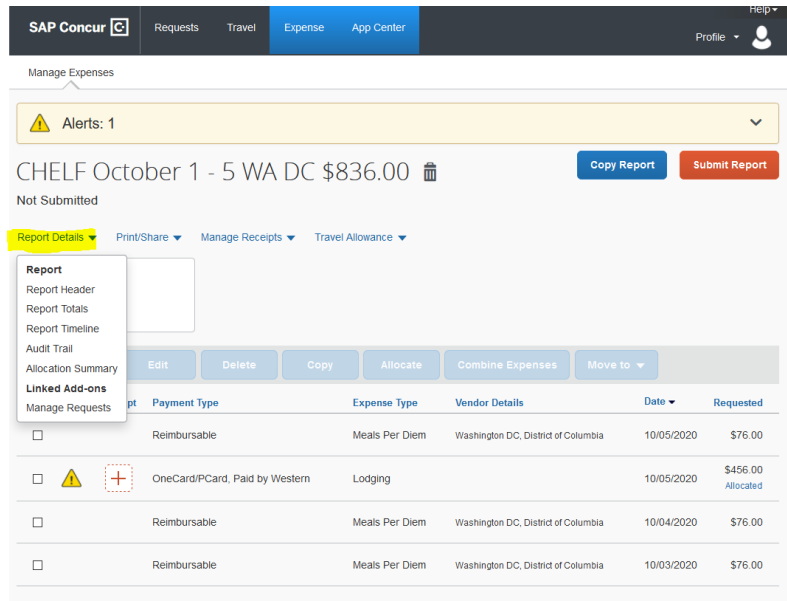
Add Edit Remove Save as Favorite

<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-1-41002-8699-8502AB	56.00

Cancel Save

10. Click **Report Details** to review and edit if necessary:

- Report Header
- Report Totals- shows breakdown of reimbursable vs non-reimbursable amounts
- Report Timeline to view Approval Flow
- Allocation Summary



The screenshot shows the SAP Concur interface for managing expenses. At the top, there are navigation tabs for Requests, Travel, Expense, and App Center. The main header displays 'Manage Expenses' and 'Alerts: 1'. Below this, the report title is 'CHELF October 1 - 5 WA DC \$836.00' with a trash icon and buttons for 'Copy Report' and 'Submit Report'. The status is 'Not Submitted'. A dropdown menu for 'Report Details' is open, showing options: Report Header, Report Totals, Report Timeline, Audit Trail, Allocation Summary, Linked Add-ons, and Manage Requests. Below the menu is a table of expenses with columns for Payment Type, Expense Type, Vendor Details, Date, and Requested amount.

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.