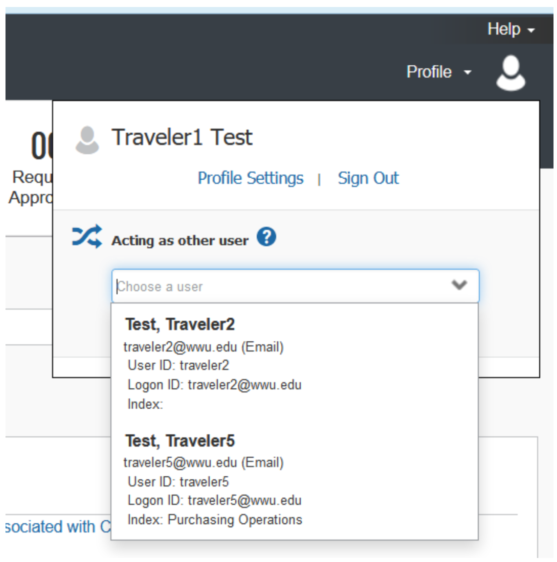
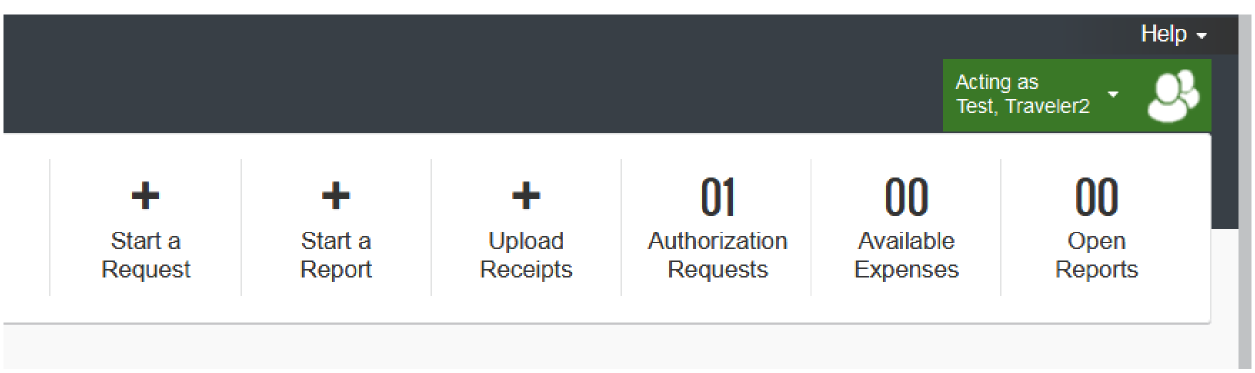
Travel Services

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:**

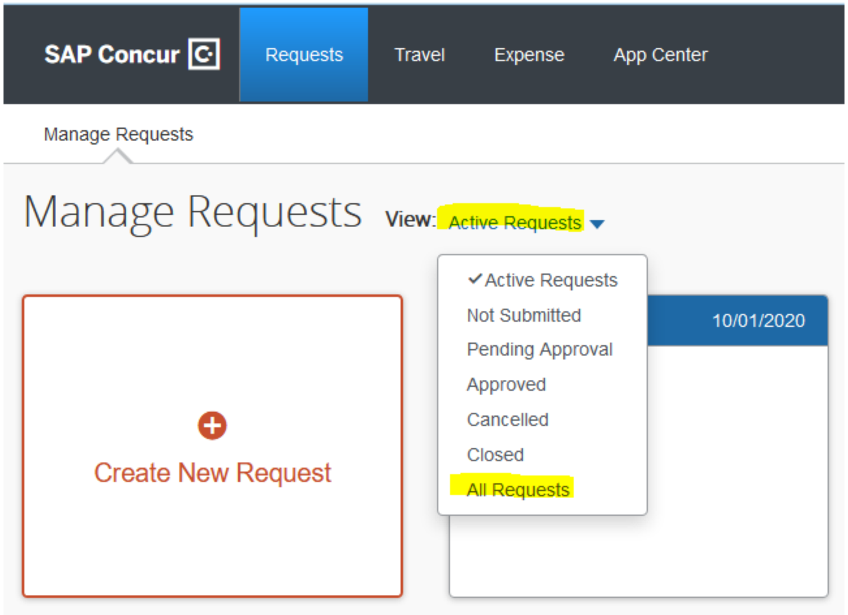


- ***If you do not have*** *the Acting as other User option or the traveler's name does not come up in the search,* ***the traveler must assign you as a delegate*** *in their Profile Settings.* Travel Services can also enable delegate permissions.
- Click **Start Session**. You are now acting as a delegate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

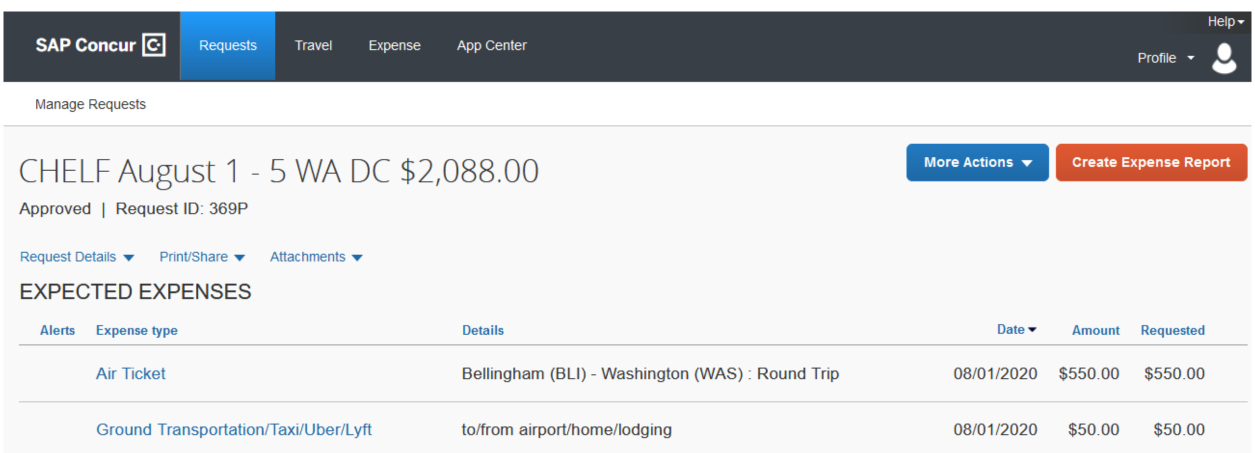


2. Click the Requests tab **at the top of the screen.** Always start with the approved Request.

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:***



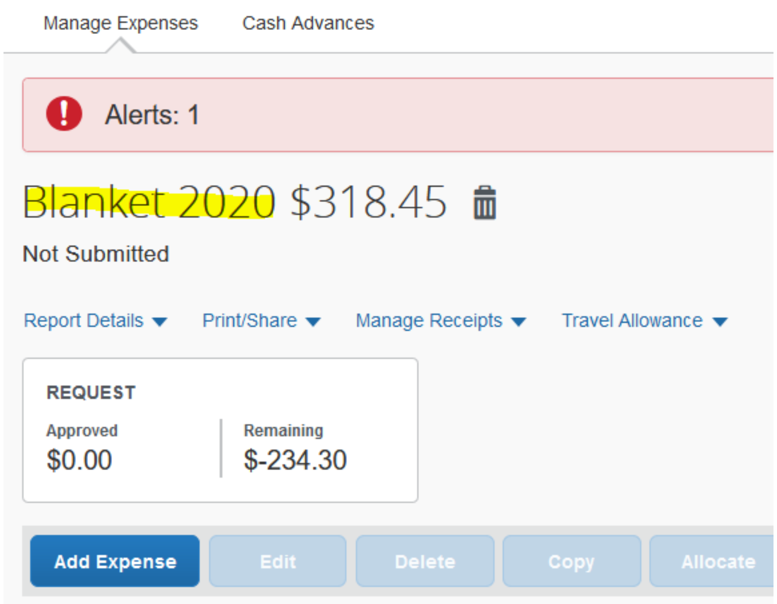
4. **Click the Create Expense Report Button** at the top right within the approved Request:



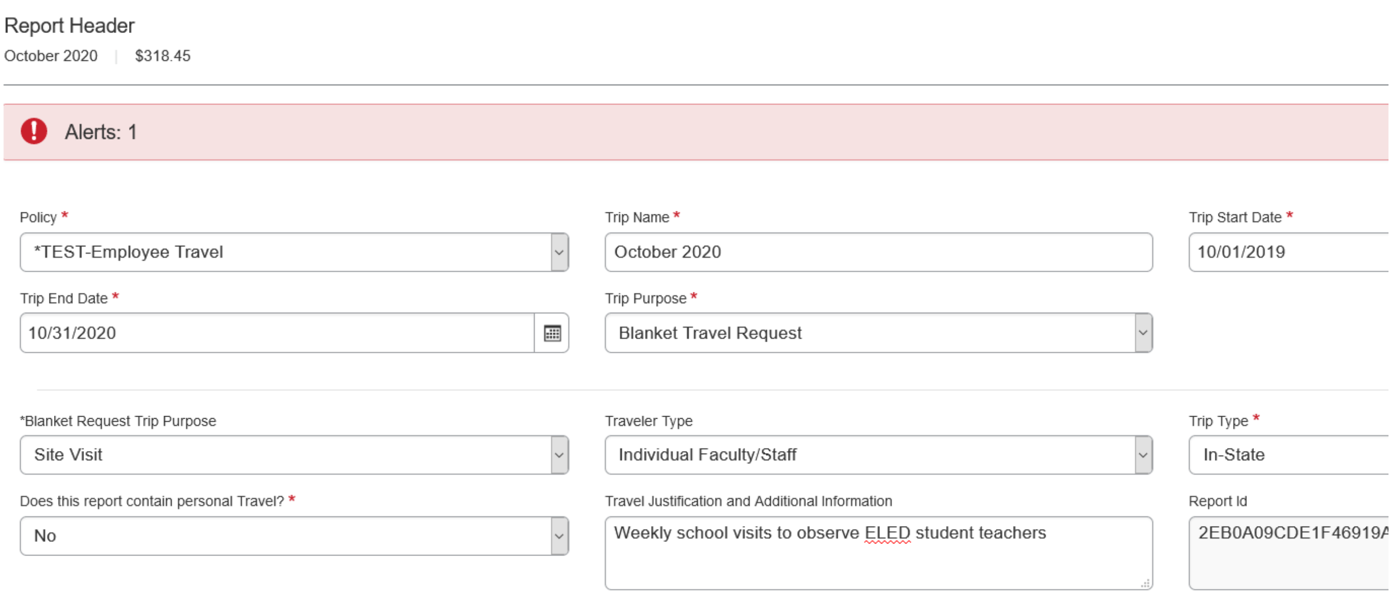
5. **Report Header information** is copied from the Blanket Request and needs to be updated for each report. Click on the Blanket Name or select Report Header under Report Details:

Sally Parsons | Travel Services
sally.parsons@wwu.edu | 360.650.6640

Devlin Sweeney | Business & Financial Systems
devlin.sweeney@wwu.edu | 360.650.4550

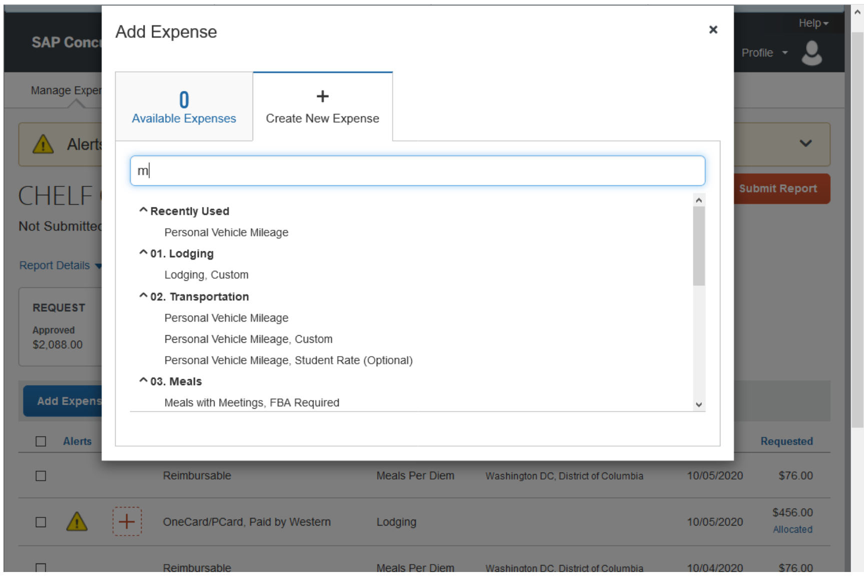


- **Edit Header Information from Blanket to Correct Month (see below):**
  - Trip Name
  - Trip Start and End Dates
  - Select a Blanket Request Trip Purpose from the drop-down list
  - Update the Travel Justification information

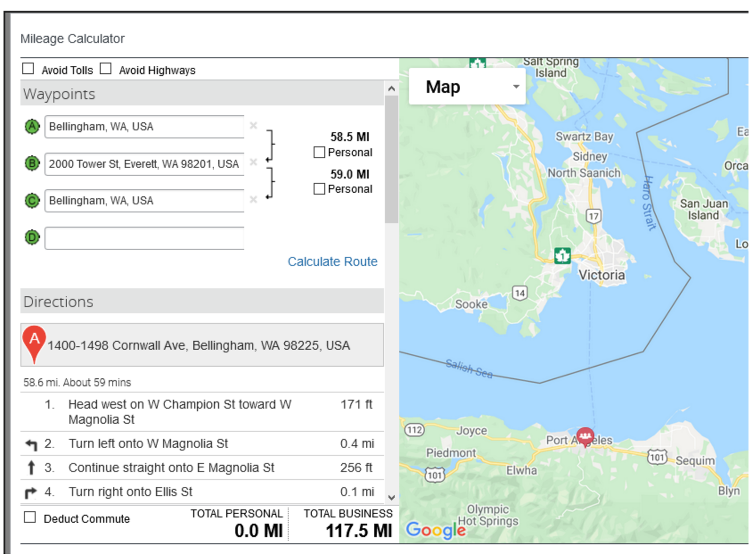


6. **Click Save** on the bottom right

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



   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.

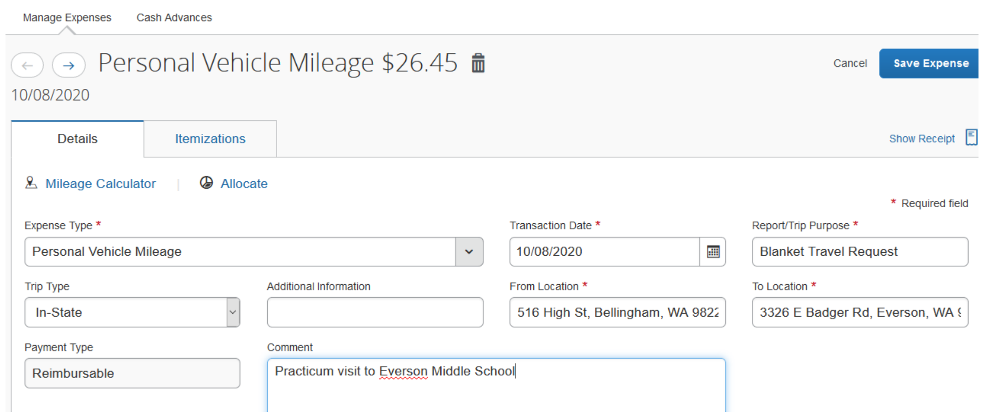


   c. Click Add Mileage to Expense button on bottom right
   d. Enter Transaction Date

Sally Parsons | Travel Services
sally.parsons@wwu.edu | 360.650.6640

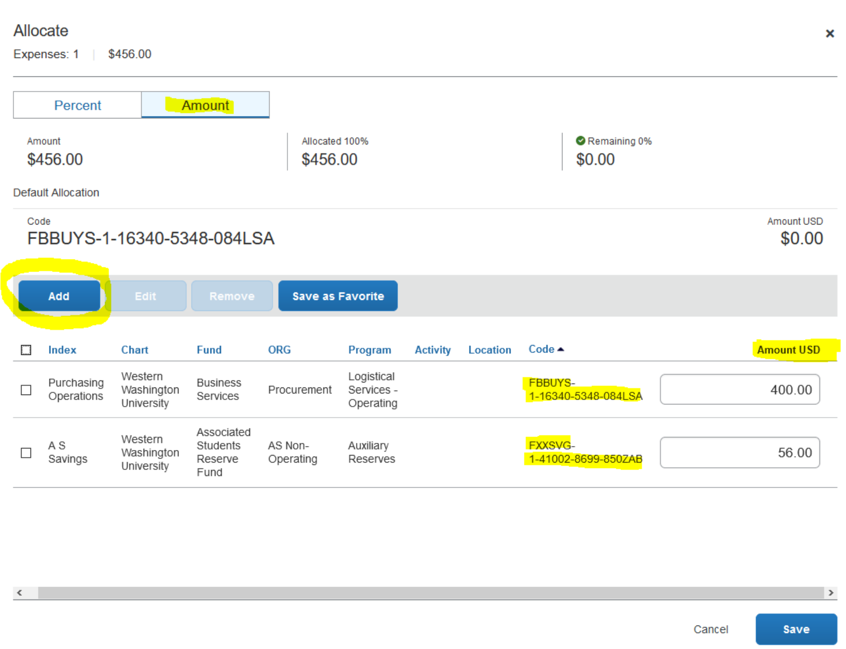
Devlin Sweeney | Business & Financial Systems
devlin.sweeney@wwu.edu | 360.650.4550

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



f. Click Save Expense or Save and Add Another

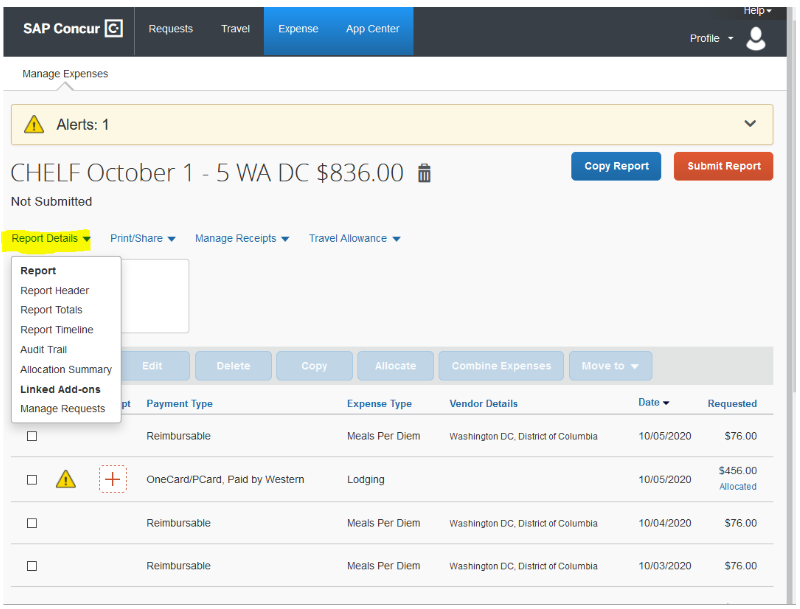
8. Repeat for each mileage expense. **Include all mileage trips on the same Expense Report.**
   - Copy a mileage expense by clicking the box to the left and selecting Copy button above. The system automatically assigns next day's date to copied expense. Edit transaction dates as needed.
9. **To Change 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:



Sally Parsons | Travel Services
sally.parsons@wwu.edu | 360.650.6640

Devlin Sweeney | Business & Financial Systems
devlin.sweeney@wwu.edu | 360.650.4550

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



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