Blanket Travel

• Blanket Travel Overview
• Creating a Blanket Travel Request
• Creating an Expense Report (from a Blanket Request)
**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 routine, local travel 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 > Start a Request**

  OR

• On the menu, click **Requests > New Request**
Creating a New Travel Request

Travel Request consists of the following Tabs:

- Request Header
- Segments (No segments for blanket travel)
- Expenses
- Approval Flow
- Audit Trail
<table>
<thead>
<tr>
<th>Required Fields related to Blanket</th>
<th>Appropriate Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request/Trip Name</td>
<td>Blanket Travel and the Fiscal Year.</td>
</tr>
<tr>
<td>Trip Type</td>
<td>In State</td>
</tr>
<tr>
<td>Travel Start and End Date</td>
<td>End Date = June 30, 20XX</td>
</tr>
<tr>
<td>Trip Purpose</td>
<td>Mileage/Parking Only</td>
</tr>
<tr>
<td>Personal Dates of Travel</td>
<td>NA</td>
</tr>
<tr>
<td>Destination City/State</td>
<td>Multiple Locations (Mileage Only), California</td>
</tr>
</tbody>
</table>
Request Header

- **Step 1**: Complete **Travel Request Header**.
- **Step 2**: Once Header is complete, click **Save**.
- **Step 3**: Skip the **Segments** Tab and click on **Expenses** Tab.

- All boxes with red bars are required fields.
- Enter Multiple Locations as the Destination City/State.
- Chartfield default is NGO01 & your Dept. ID is populated from HR.
You can provide estimates for the following additional Expense Types:

- You should provide estimates for all expenses related to your travel for the whole fiscal year/duration of the blanket.
- By selecting Personal Car Mileage, you will indicate the distance (estimated mileage) for the fiscal year/duration of the blanket.
- If you think you will have Parking/Tolls or Ground Transportation, add those estimated expenses to the blanket.
- 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.
- After clicking on the Expense Type and entering the required and optional information if needed, you can then Allocate (if needed) and Save.
Expenses (Personal Car Mileage)
Expenses (Ground Transportation)
• Continue adding your estimated expenses. Again, estimated amounts should be for the duration of the blanket.

• If you need to attach a document or site visit list, click on Attachments > Attach Documents on the top right hand corner.
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 action is needed.
  - You have the option to allocate by **Percentage** or **Amount**.
  - The allocations will carry over to the expense report when the request is linked and the expense type is chosen.
- **Delete**: If you want to delete the segment/expense all together.
- **Modify**: If you need to make changes to any part of the expense.
After you have completed the **Request Header, Segments** and **Expenses**, you can submit your request by clicking **Submit Request**.

- You can also click on **Print/Email** and a PDF version of the Travel Request will pop up and you can make your selection. It is best to do this after the Travel Request is fully approved. Attachments will not be with request. You will need to open the attachment and print/email separately.

- 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 submitted. However, you can **Recall** the Request after submission if it has yet to be fully approved, or **Cancel** the Request at any time.
Travel Request Approval Workflow

_travel Request (in-state) Approval Workflow_

1. **Travel Request Submitted**
2. **Routes to "Reports To" Approver**
3. **Routes to Budget Approver**
4. **Request Approved**
Travel Request Approved

- Once your travel request has been approved, you will receive an email notification from Concur stating your Request has changed status to: Approved.

- Once the request is approved, you can no longer make updates. However, you can add additional attachments at anytime.
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**.

• 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 or negative.
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** and click **Calculate Route**, then click **Add Mileage to Expenses**. The From/To Locations will populate. Then click **Save**.
Adding Expenses

- Continue adding all expenses regarding your travel (Parking/Tolls, Ground Transportation, etc.) Each expense should be separated by travel date and not lumped together for the month.

- If the transaction total is $75 or more, please make sure to attach a receipt. You can also Allocate (if chartfield is different than on Report Header) if needed.
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 Handbook and other related documentation at: https://fiscaff.sfsu.edu/content/sf-state-travel-center
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