

General Information

Per ICSUAM and the CSU Travel Procedures, the Expense Report must be submitted for reimbursement within 60 days of the end of the trip. For Blanket Travel, please submit one (1) Expense Report at the end of every month when there is travel. To remain in compliance with Executive Orders and the CSU Travel Procedures, approval of the Expense Report must be obtained as follows:

- All travel for faculty and staff, Domestic and International: HEERA Manager
- All travel for faculty, Domestic and International: College Dean
- All travel for faculty and staff, Domestic: Vice President’s Sub-Delegates

Creating an Expense Report from a Blanket Travel Request for Mileage

To begin creating your Expense Report, do one of the following:

- Click on the “Open Requests” tile in the “Quick Task Bar” on the home page.

**MY TASKS**

Count	Task Name	Action
41	Open Requests	→
00	Available Expenses	→
31	Open Reports	→

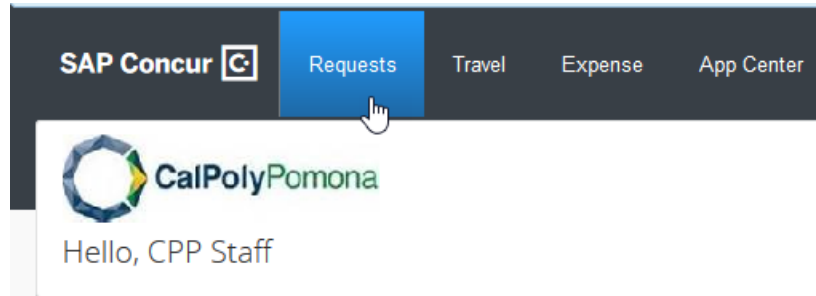
**Open Requests Details:**

03/31	Copy of CSU Business Confer...	\$1,379.31 — Travel
01/01	Dory - Jan 2019 Mileage	\$109.00 — Travel
12/17	Adrian - "Business Travel"	\$3,869.49 — Travel
12/10	Manisha Desai-CSU CONFER...	\$185.00 — Travel
12/01	Helen - Blanket REQUEST for...	\$43.60 — Travel

**Open Reports Details:**

12/13	Helen - Dory	\$1,468.36 Returned
12/13	Helen - Natalie	\$1,468.36 Returned
12/13	Helen - Linda	\$1,468.36 Returned
12/12	Helen - Adrian	\$48.44
12/03	Nov 2018 Mileage Supervision	\$18.53

- On the menu, click “Requests”.



The “Manage Requests” page will appear. Choose the correct approved Travel Request and click on the blue “Expense” hyperlink on the far-right side of the request. You can then begin to build your Expense Report.

Manage Requests    New Request    Quick Search

### Active Requests (2)

<input type="checkbox"/>	Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approved ...	Remaining...	Action
<input type="checkbox"/>	Nov 2018 Mileage Supervision	33H9	Not Submitted	11/01/2018		\$109.00	\$0.00	\$0.00	
<input type="checkbox"/>	Nov 2018 Mileage Supervision	33H7	Approved	07/01/2018 11/30/2018 07/01/2018	12/03/2018	\$109.00	\$109.00	\$109.00	<a href="#">Expense</a>

Create an expense report from this request

# CREATING AN EXPENSE REPORT FROM A BLANKET TRAVEL REQUEST FOR MILEAGE IN CONCUR

08/26/2019

The selected Travel Request will appear in the “Requests” area of the “Report Header”. Additionally, by associating your Travel Request with your Expense Report, select fields will auto-populate from your approved request. Validate that the information populated by your Request is accurate and complete the remaining required and optional fields. Each required field is identified by a red line on the left of the box. Use the drop-down arrows and the calendar when available on each field. After entering all required and optional information, click “Next”.

Create a New Expense Report  
Report Header

Policy: \*TEST CPP-State Travel Policy  
Report/Trip Name: Nov 2018 Mileage Supervision  
Report/Trip Start Date: 07/01/2018  
Report/Trip Start Time: 08:00 am  
Report/Trip End Date: 07/01/2018  
Report/Trip End Time: 05:00 pm  
Destination City: Pomona  
Country: UNITED STATES

Destination State: CALIFORNIA  
Report/Trip Purpose: Blanket Travel (Mileage/Parking)  
Traveler Type: Staff  
Trip Type: In-State Travel  
Division: Administrative Affairs  
Does this trip include personal travel?: No  
Personal Travel Dates: [Empty]  
Additional Information: [Empty]  
Comment: [Empty]

Business Unit: POCMP  
Fund: (POM01) OPERATING FUND  
Department: (67700) Accounting Services  
Program: (0602) Fiscal Operations  
Class: (00000) No Class Value  
Project: [Empty]

Slate Vendor ID: 123456  
Home Address: 123 ABC Street, Pomona CA 91768  
Call for Pickup: [Unchecked]

Requests

Request Name	Request ID	Cancelled	Request Total	Amount Approved	Amount Remaining
Nov 2018 Mileage Supervision	33H7	No	\$109.00	\$109.00	\$109.00

Next >> Cancel

Once you click on “Next” on the “Report Header” page, you will automatically be routed to the “Expenses” page. This page will be used to enter your actual mileage expenses incurred for the month. Select the “Personal Car Mileage” “Expense Type” and complete the required and optional fields.

Nov 2018 Mileage Supervision

+ New Expense Import Expenses Details Receipts Print / Email

Expenses

Date	Expense Type	Amount	Requested
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Adding New Expense

No Expenses Found

New Expense

Expense Type: [Empty]

Recently Used Expense Types

Hotel - Domestic	Dinner - Domestic	Personal Car Mileage	Airfare	Registration Fees
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All Expense Types

<b>01. Travel Expenses</b> Hotel - Domestic Incidentals Lodging Allowance - International Airfare Airline Fees Car Rental	<b>...02. Transportation</b> Parking Public Transport Shuttle Fees Taxi Tolls/Road Charges Train 03. Meals	<b>...03. Meals</b> Daily Meal Allowance - International Dinner - Domestic Lunch - Domestic 05. Office Expenses Courier/Shipping/Freight Office Supplies/Software Printing/Photocopying/Stationery	<b>07. Fees</b> Agency Booking Fees Currency Exchange Fees Passports/Visa Fees 08. Other Abstract Fee Justification Miscellaneous	<b>...08. Other</b> Professional Subscriptions/Dues Registration Fees Student Liability Form <b>Mileage</b> Personal Car Mileage
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When you use your personal car for business purposes, you need to create a personal car expense to determine the amount of mileage reimbursement. CPP will reimburse for the lesser of the mileage computed between the traveler’s residence or normal work location and their destination. The mileage reimbursement rate is pre-populated and is based on the current IRS Standard Rate. The “Transaction Date” you enter will determine the mileage reimbursement rate the system will use. To view the current mileage reimbursement rate, click on the “View Reimbursement Rates” hyperlink on the “Personal Car Mileage” “Expense Type”.



Once you click on the “Personal Car Mileage” “Expense Type” on the “Expenses” screen, the page refreshes with the required and optional fields displayed, including the “Mileage Calculator” link. Because you added your approved request to your Expense Report, the “Transaction Date” and “Report/Trip Purpose” fields will auto-populate. **However, a separate entry for mileage should be completed for each day of travel during the month.** Complete the remaining required fields that are identified with a red line on the left of the box. The “From Location” and “To Location” fields should be entered using the “Mileage Calculator”.

Click the “Mileage Calculator”. In the Waypoints fields, enter the addresses of your starting and ending locations. For more accuracy, it is recommended to always enter the full address for both locations. Click “Calculate Route” to determine the mileage for your trip. You can click “Make Round Trip” to calculate the mileage for a round trip. You will see the calculated distance between the locations that you have entered. To add the distance to your expense, click “Add Mileage to Expense”.

The screenshot displays the 'Mileage Calculator' window. On the left, the 'Waypoints' section contains two entries: '3801 W Temple Ave, Pomona, CA 9176' and 'Ontario International Airport (ONT), Ont', both enclosed in a red box. To their right, the calculated distance is '18.2 MI' with a 'Personal' checkbox. Below the waypoints are 'Calculate Route' and 'Make Round Trip' buttons. The 'Directions' section lists suggested routes: 'I-10 E 18.2 mi. About 23 mins', 'CA-60 E 16.5 mi. About 23 mins', and 'CA-60 E and S Archibald Ave 17.5 mi. About 26 mins'. A detailed route is shown on the map, starting at point 'A' (3801 W Temple Ave, Pomona, CA 91768, USA) and ending at point 'B' (Ontario International Airport). The map shows a path through Pomona, Ontario, and Upland. At the bottom, a red box highlights the text 'Click Add Mileage to Expense to add the mileage to your expense type.' with an arrow pointing to the 'Add Mileage to Expense' button. The 'TOTAL BUSINESS' mileage is shown as '18.2 MI'.

The “From Location” and “To Location” fields are populated automatically, and the calculated distance appears in the “Distance” field; which Concur rounds to the nearest mile. The “Distance” and “Rate” values automatically calculate the “Amount” for the expense. In the “Comment” field, be sure to enter the name(s) of the school(s) or location(s) you have visited for each entry. Click “Save”.

View Reimbursement Rates

Expense Type: Personal Car Mileage

Trip Type: In-State Travel

Transaction Date: 09/05/2018

Report/Trip Purpose: Conference Attendee

Additional Information:

From Location: 3801 W Temple Ave, Pomona, CA 9

To Location: Ontario International Airport (ONT)

License Plate Number: ABC123

Payment Type: Out of Pocket

Distance : Amount: 18 : 9.81 USD

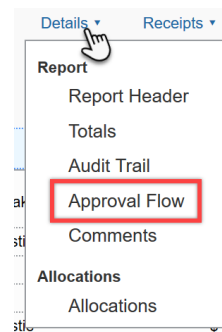
Comment:

Request: 09/03/2018, \$18.31 - FOA Cc

Mileage Calculator

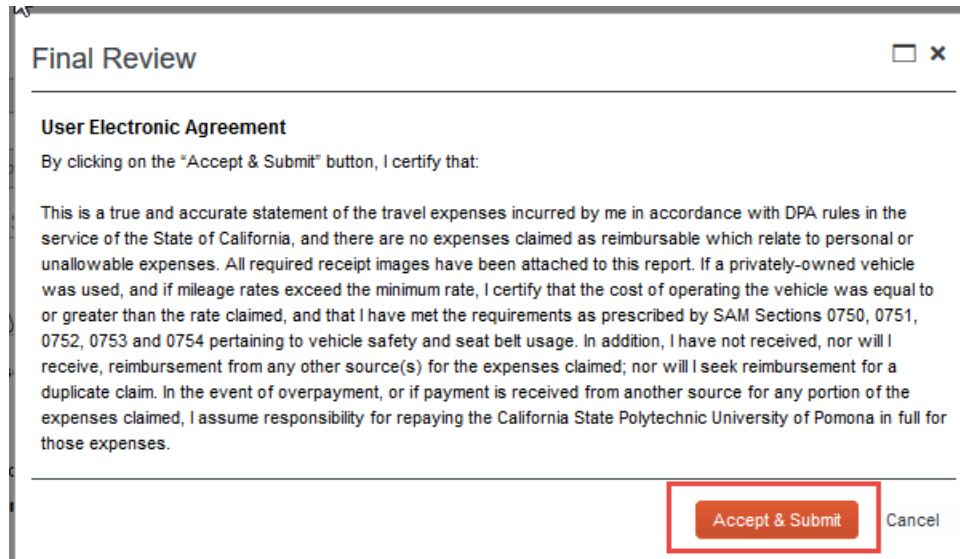
Be sure to click the Save button after each entry. → Save Allocate Attach Receipt Cancel

Once you have entered all mileage and parking (if applicable) for each day of the month you traveled, you are now ready to review your approval workflow and submit your Expense Report for approval. From the “Expenses” screen, click on “Details” > “Approval Flow” to have the “Approval Flow for Report” window appear for review.





Once done inputting all information for your Expense Report, click “Submit Report” in the upper right corner of the screen. The “Final Review” window will appear. Read through the user electronic agreement and click “Accept & Submit” to acknowledge confirmation of your submission.



The screenshot shows a window titled "Final Review" with a close button in the top right corner. Below the title is a section titled "User Electronic Agreement". The text in this section reads: "By clicking on the 'Accept & Submit' button, I certify that: This is a true and accurate statement of the travel expenses incurred by me in accordance with DPA rules in the service of the State of California, and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses. All required receipt images have been attached to this report. If a privately-owned vehicle was used, and if mileage rates exceed the minimum rate, I certify that the cost of operating the vehicle was equal to or greater than the rate claimed, and that I have met the requirements as prescribed by SAM Sections 0750, 0751, 0752, 0753 and 0754 pertaining to vehicle safety and seat belt usage. In addition, I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed; nor will I seek reimbursement for a duplicate claim. In the event of overpayment, or if payment is received from another source for any portion of the expenses claimed, I assume responsibility for repaying the California State Polytechnic University of Pomona in full for those expenses." At the bottom right of the window, there are two buttons: "Accept & Submit" (highlighted with a red box) and "Cancel".

Your report is now submitted and pending approval.



[Campus Contact Information](#)

If you have questions regarding the Travel Procedures or how to use Concur, please contact:

[Travel@cpp.edu](mailto:Travel@cpp.edu)

A staff member from University Accounting Services/Accounts Payable will contact you to address your question.

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If you have technical questions regarding the Concur system, or your default approvers need to be updated, please contact:

[concurtech@cpp.edu](mailto:concurtech@cpp.edu)

A staff member from IT will contact you to address your question.