

# ENTERING MILEAGE EXPENSE REPORTS IN CONCUR

Log on to the YSU portal using your **username** and **password** (If you forget either of these, call the HelpDesk at 330-941-1595). In the left hand column under **e-Services for Faculty and Staff** click on **Concur Travel & Expense**.

Make sure that your profile is set up with a personal car. You only have to do this the first time unless you have a change. Setting up your car, lets the system determine which reimbursement rate that you will receive for personal car mileage. The University currently has 3 different reimbursement rates for mileage.

- Click on **“Profile”** (top right of the page). Then click on **“Profile Settings”**.



- Under Profile Options – Click on **“Personal Car”**. This takes you to the Personal Car Registration screen.
- Click **“New”** and type *Personal Car, State Grant Car, or Courtesy Car* in the Vehicle ID. Click on the **“Vehicle Type”** drop-down, choose *Courtesy Car* (reimbursed at \$.29 a mile – mostly athletics), *Personal Car* (reimbursed at \$.48 a mile – standard reimbursement rate), or *State Grants* (limited reimbursement of \$.45 a mile.) You can add more than one type if you are reimbursed at different rates depending on your business travel purpose.
- Click **“SAVE”**.

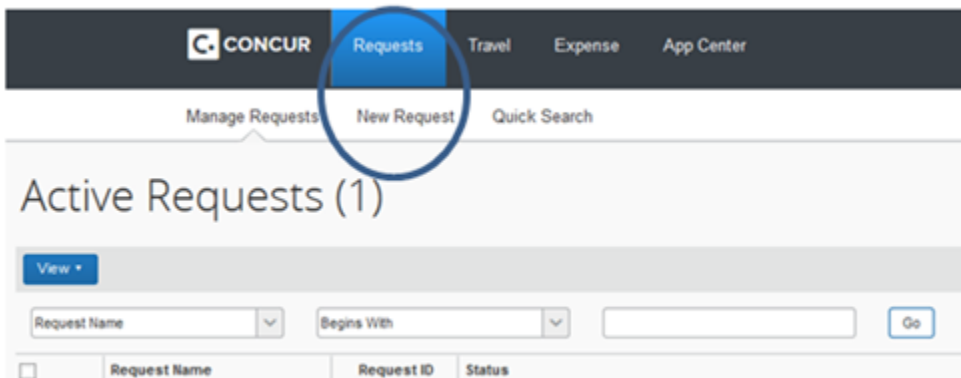
## Preparing the Request

**Your Request can be for a single trip, or be a blanket Request and encompass an entire semester or fiscal year depending on your department’s desires.**

- Click on **“+ Start a Request”** button to begin a new Request or click on **“Requests”** at the top of the screen and click on the **“Create New”** and choose **“New Request”**.

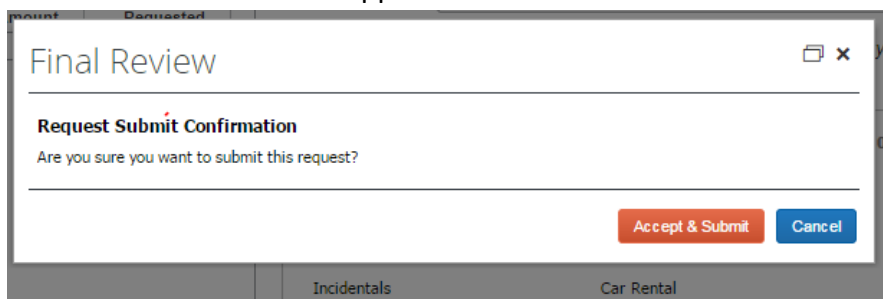


## Screen shot of managing Requests



- In **Request Name** type a description that if you are looking for the report, it will be easy to find such as **St Travel S14**; Enter the **Start Date** and **End Date**; the **Purpose**; and **Account** (select the account that your department tells you to use.)
- Click **“SAVE”**. This will take you to the Expenses tab.
- Click on **Personal Vehicle Mileage**.
- Enter the **Transaction Date** – use the first day of travel.
- Enter the total estimated amount in the **Transaction Amount** field. Click **“SAVE”**.
- Add any other estimates as necessary, parking, tolls, etc.
- Click on **“Submit Request.”**
- Click on **“Accept & Submit Request”**.

Final Review Window will appear




Upon approval your Request will show as approved in the Request pane under Status and you will also receive an email saying the status has changed to approved.

## Active Requests (3)

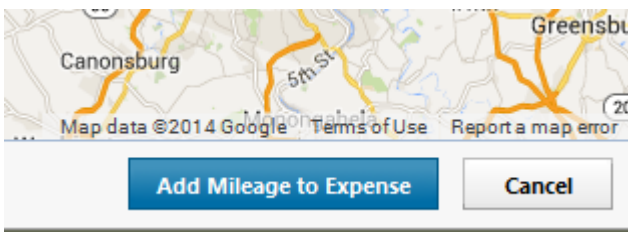
view ▾

Request Name ▾ Begins With ▾

Request Name	Request ID	Status
 FITSC Conference Dec 2014 show approver screens in new UI	37QN	Sent Back to Employee - Lucivjansky, Rhonda L.
IPO 10/16/2014 get supplies	37DP	Approved
Summit Conference November 2014 asfsfs	37CD	Not Submitted

### Creating an Expense Report

- Click on **“Expense”** at the far-right under Action next to your approved request or open the approved Request and click on **“Create Expense Report”**.
- This will open up the Expense Report and connect the Request to the Expense Report.
- Report Name will auto-populate from the Request, you can change or leave the same.
- Business Purpose will auto-populate from the Request, you can change or leave the same.
- Drop down menu for **Account** and select **correct account**.
- Click **“NEXT”** at bottom of screen.
- On **Itinerary Screen** click **Cancel** at bottom of screen – the itinerary screen is for multiple day trips.
- On the Expense screen click **Personal Car Mileage expense type – the mileage calculator pops up**.
- Type in your to and from locations. You can add multiple locations at one time.
- Click on **“calculate trip”**.
- **“Click on Make round trip”** – if round trip - mileage will be calculated automatically.
- Click on the blue button – **“Add mileage to Expense”**.



- This will return you to the Expense pane.
- Type in the transaction date (date of travel).
- Enter the destination name in the comment field especially if you will go this same location multiple times on this same report.
- Click **“Save”** – this will add the expense to the expense side (left-hand side of the report).
- Click on **Personal Car mileage** to add next location.

- You can also add any other expenses that you had such as tolls, parking, etc. by clicking on those expense types.

### To copy the same trip to a new day

- Click on the box next to the trip you wish to copy.

<input type="checkbox"/>	Date	Expense	Amount	Requested
<input type="checkbox"/>	11/18/2014	Fixed Meals Washington, District of Columbia	\$35.25	\$35.25
<input type="checkbox"/>	11/17/2014	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00
<input type="checkbox"/>	11/16/2014	Fixed Meals Washington, District of Columbia	\$71.00	\$71.00
<input type="checkbox"/>	11/15/2014	Fixed Meals Washington, District of Columbia	\$41.25	\$41.25
<input checked="" type="checkbox"/>	11/12/2014	Personal Car Mileage	\$49.44	\$49.44

- Click on the **“Copy”** button.
- This will create the same trip with the next day.
- If the date needs to be changed, click on the expense – this opens it up in the right-side pane.
- Click on **transaction date** and change the date.
- Click **“Save”** button at the bottom of the screen.
- If you travel from one school to another you can keep adding school addresses but do not click on round trip. After the last school, type in your home address again. Mileage will be calculated from your home to school one, then to school two or more, and then back to your home.
- Once all locations are added – Click the Blue Button – **Submit Report**- at the top right-hand corner of the screen.

### REMINDERS

Per [YSU Travel Guidelines](#) posted on the [Travel Services website](#) under Rental/Personal cars:

Should you choose to drive your personal vehicle the mileage reimbursement will be capped at the rental rate through Enterprise for a full size car times the number of days rented plus gas equivalent cost (this would also include the cost for the early start program offered through Enterprise for rentals that need to be picked up before the start of the business day at Enterprise). If personal car mileage claimed exceeds 120 miles per day, then the traveler will need to compare the mileage reimbursement to the cost of a rental car/gas by using the [Car Rental vs Mileage Reimbursement calculator](#) and attaching the calculator page to the Expense Report (this requirement excludes courtesy car mileage reimbursement). **The amount will be entered in the mileage limited expense type rather than the personal car mileage type on the Expense Report.**

Also, if commencing travel from your home, the reimbursement shall be the lessor of the distance from your home or workplace to your destination.