# PERSONAL MILEAGE REIMBURSEMENTS Concur How-To

- Procedure to create your report in the SBCC District Credit Card Policy, EXPENSE MODULE.
- Screenshots and step by step instructions begin on Page 2.
- <u>Best Practice</u>: It is recommend Personal Mileage Reimbursement Requests be Submitted Monthly

### 1. Create New Report

- a. Select the Expense module and SBCC Credit Card Policy
- b. Enter the Report Title, and the date range included in the report
- c. Complete report. All required fields are marked with a red asterisk
  - i. Boxes titled: Employee Type and Report/Trip Purpose
    - 1. Select the *District Credit Card* from the dropdown menu.
    - 2. Fill in your budget code:
      - a. Select the *Chart* in the box (select the only option available).
      - b. Enter your Fund, Org, Program (plus Activity and Location, if applicable); Retain the Account Number for use when "adding expenses".
    - 3. Once you have completed all fields, select the *Create Report* button in the bottom right.

### 2. Add Expenses to your report

- a. Open your new Report and select the *Add Expense* button.
  - i. In the new screen that opens, enter your Expense Type (aka Account Code): Use the *Expense Type: Personal Car Mileage* 
    - 1. Instead of uploading a receipt as you would for other expenses, select the *Mileage Calculator* that is in blue near the upper left of the expense screen.
    - 2. This will connect you to Google Maps to calculate the mileage.
    - 3. Enter starting and ending addresses and click *Calculate Route*.
    - 4. Select Add Mileage to Expense
  - ii. Save
  - iii. Submit

# CREATE A NEW REPORT

- 1. Select NEW
- 2. Select START A REPORT

SAP Concur		(1	+	00	00	01	04
			New	Required Approvals	Authorization Requests	Available Expenses	Open Reports
My Trips (0)	-	Alerts	Start a Request				
ing mps (o)		Alerts 2	Start a Report				
You currently have no upcoming trips.		As an employee of Santa Barbara ( Learn More and Activate Not right n		strict, you are	eligible for a free <b>Tr</b>	iplt Pro subscripti	on.
		• You haven't signed up to receive e-	receipts. Sign up	here			

### 3. Select DISTRICT CREDIT CARD POLICY

reate New Report						
Create From an Approved Request						
Policy *						* Required field
*SBCC-Travel & Conference Expense Policy	~					
*SBCC-Travel & Conference Expense Policy						
*SBCC-District Card Expense Policy	Repor Trip Start Date *		Report/Trip End Date *		Report/Trip Purpose *	
	MINDD/YYYY	Ë	MM/DD/YYYY	÷	None Selected	~

- 4. Data Entry: Report Trip Name
  - a. Enter a Report name that will make sense to you and to your approver. Include unique naming to distinguish from month to month. Example 'March 2024 Mileage Report'
- 5. Data Entry: *Report/Trip Start Date -* Enter start date
- 6. Data Entry: *Report/Trip End Date* Enter end date
- 7. Data Entry: *Report/Trip Purpose* 
  - a. Select **DISTRICT CREDIT CARD**
- 8. Data Entry: Employee Type Select DISTRICT CREDIT CARD
- 9. Data Entry: *Trip Type* Select **NONE**
- 10. Select CHART Find and Select (1) SBCC Chart.

#### Notes on Budget Codes:

If you have been given a budget code that looks like this: 799414-0000-451000-000000, then 799414 is the Fund, 0000 is the Org, and 000000 is the Program. The '451000' portion is the account code, which is the equivalent of Expense Type, in Concur. You will select your Expense type on a different screen.

11. Select **FUND** - Find/Enter your funding source, such as 11000 for the UGF, a fund beginning with a 12 for a RGF Grant Fund, etc.

- 12. Select **ORG** Find/Enter your Department four-digit code.
- 13. Select **PROGRAM** Find/Enter your Program six-digit code.
- 14. Select **ACTIVITY** Use only when assigned; otherwise select **NONE**
- 15. Select LOCATION: Use only when assigned; otherwise select NONE
- 16. Select CREATE REPORT

Create From an Approved Request							
Policy *							* Required
*SBCC-District Card Expense Policy	~						
Report/Trip Name *	5 R	Report/Trip Start Date *	6	Report/Trip End Date *	7	Report/Trip Purpose	
Mileage for March		08/05/2024	Ë	08/30/2024	Ë	District Credit Card	
Employee Type *	9	īrip Type		Additional Information	10	Chart *	
District Credit Card	~	None Selected	~			(1) SBCC Chart	×
						Fund *	
						(11000) General Fund - Unrestricted	×
Org *	13	<sup>2</sup> rogram *	14	Activity	15	Location	
(0866) Radiologic & Imaging Sciences	× ~	(122500) Radiological Technology	× •		~	None Selected	
(0866) Radiologic & Imaging Sciences	× ~	(122500) Radiological Technology				None Selected	
nt							0/!

### 17. Confirmation Screen: "Report Saved"

- 18. <u>Explanation</u>: New Report Details show the following:
  - a. Name Assigned
  - b. Not (yet) Submitted
  - c. Report Number assigned

Concur Expense	×	
Manage Expenses Card Trans	sactions	
	Home / Expense / Manage Expenses / Mileage for March	
18	Mileage for March \$0.00	Delete Report Submit Report
	Not Submitted   Report Number: 14GMI6	
	Report Details 🛩 Print/Share 🗸 Manage Receipts 🗸	View Available Receipts 🗒
	Add Expense Edit Delete Copy Allocate C bine Expenses Move to V	View: Standard 🗸
	No Expenses	
	. Id expenses to this report to submit for reimbursement.	
SAP Concur	17 Report saved	

# ADD EXPENSE

SAP Concur	Expense 🗸	
Manage Expenses	Card Transactions	
	Home / Expense / Manage Expenses / Mileage for March	
	Mileage for March \$0.00	Delete Report Submit Report
	Not Submitted   Report Number: 14GMI6	
	Report Details V Print/Share V Manage Receipts V	View Available Receipts 🗐
	Add Egense Edit Delets Copy Allocate Combine Expenses Move to V	View: Standard 🗸
	No Expenses	
	Add expenses to this report to submit for reimbursement.	

### 1. Select ADD EXPENSE

Manage Expenses	Expense V Card Transactions	04	xpense	+ Create New Expe	nse				×	
	Home / Expense / Manage Expenses	0	Payment Type↓↑	Expense Source	Ex/ense Type↓↑	Vendor Details↓↑	Date↓₹	Amount↓↑		
	Mileage for Ma	0	*US Bank VISA-CBCP	Corperate Card	Undefined	WELLNESSMART MD	08/04/2024	\$332.80		Delete Report
	Report Details 🗸 Print/Share 🗸									View
	Add Expense Edit Deleta									Standard
							Clo	se Add To	Report	

2. Select CREATE NEW EXPENSE

Concur Expense V	Add Expense	×
anage Expenses Card Transactions	Available Expenses (1) + Create New Expense	÷
Home / Expense / Manage Ex	senses Search for an expense type	
Mileage for	Ma	Delete Report Submit Report
Not Submitted   Report N	Recently Used     Personal Car Mileage	
Report Details 🛩 Print/S		View Available Receipts
Add Expense Edit	Instructional Supplies 431000	Standard
	Student Testing/Tests 526000 Equipment (Over \$5,000) 644899	
	∧ 02. Transportation	
	3 Personal Gar Mileage	
	▲ 06. Other	
	Personal/Non Reimbursable 916430	
	v. supplies a materials	

3. Select (Account/Expense Type) PERSONAL CAR MILEAGE

### Pause for new screen

SAP Concur	Expense 🗸				
Manage Expenses	Card Transactions				
	Home / Expense / Manage Expenses / Mileage for March / New Expense				
	New Expense				Cancel Save Expense
					Show Receipt
	4 Mileage Calculator    Expense Type *		Employee Type *	Transaction Date *	* Required field
	Personal Car Mileage	< <b>v</b>	District Credit Card	• MM/DD/YYYY	Ö
	Report/Trip Purpose * Additional Information		From Location *	To Location *	
	District Credit Card 🗸				
	Payment Type				
	Out of Pocket				

### 4. Select MILEAGE CALCULATOR

a. Concur uses Google Maps to calculate mileage. It is hard to calculate mileage by hand; Concur's mileage tracker is the official calculator of record for SBCC's mileage.

Pause for new screen



- 5. Enter the Starting Address.
  - a. If unknown, type into Google the business name and find their official address:



6. Enter the Ending Address.

#### 7. Select CALCULATE ROUTE

- a. The directions will populate and a calculation will appear in the Total Business box, see image below.
- b. Add a third stop, if needed.



## 8. Select ADD MILEAGE TO EXPENSE

New Expense			Cancel Save Expense
			Show Receipt
Details Itemizations			
Rileage Calculator B Allocate			
Allocate			* Required fiel
Expense Type *		Employee Type *	Transaction Date *
Personal Car Mileage	× *	District Credit Card 🗸 🗸	MM/DD/YYYY
Report/Trip Purpose *	Additional Information	From Location *	To Location *
District Credit Card 🗸		2050 Viborg Rd, Solvang, CA 93463, USA	1400 E Church St, Santa Maria, CA 9345
Payment Type			
Out of Pocket			
Distance *	Amount	Currency	Reimbursement Rates
34		US, Dollar (USD)	
Comment			0/50

9. Select SAVE EXPENSE OR Select SAVE AND ADD ANOTHER