



# Personal Car Mileage, Local and Callback Mileage in Concur

## DATE OF LAST UPDATE

February 6, 2020

## LAST UPDATED BY

Steve Bagley

STEP	ACTIVITY
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**Part 1- Adding your Personal Car into Concur** (before creating a request)

**Part 2- Creating a Request for Local and Callback Mileage** (before traveling)

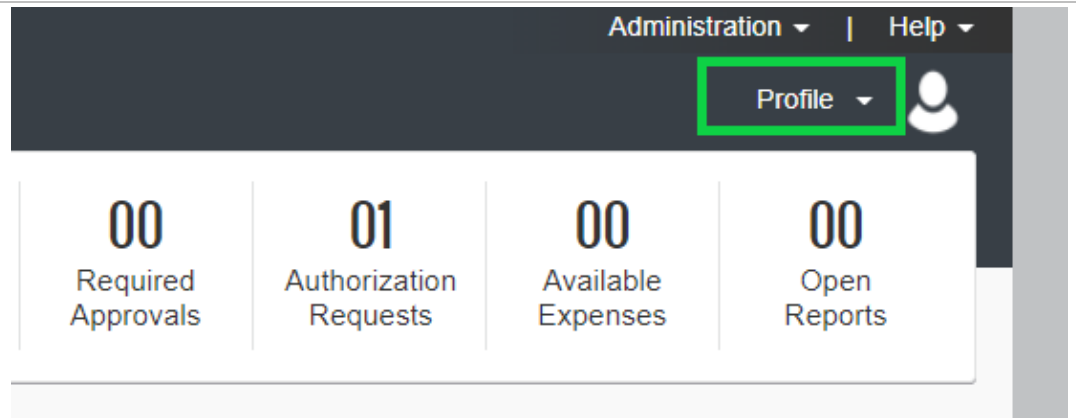
**Part 3- Creating an Expense Report for Local and Callback Mileage** (after traveling)

### Part 1

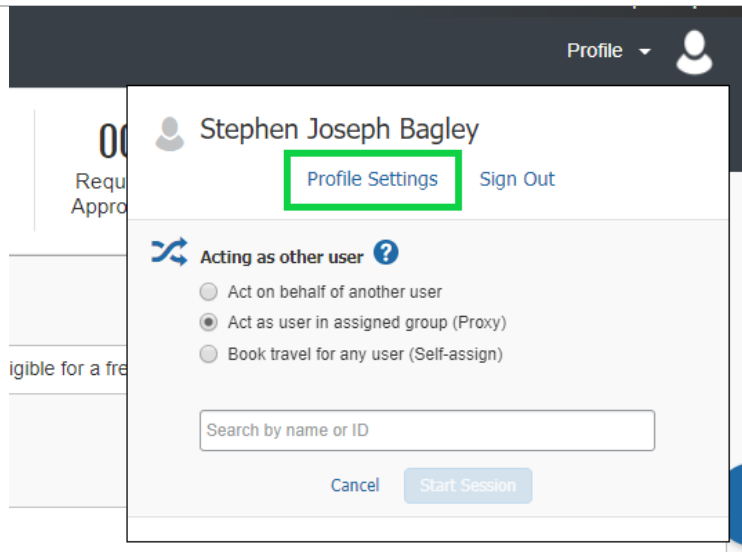
### Adding your Personal Car into Concur (before creating a request)

To use Personal Car Mileage in Concur, you must first add your car to your profile.

Choose **"Profile"** in the upper right hand corner.

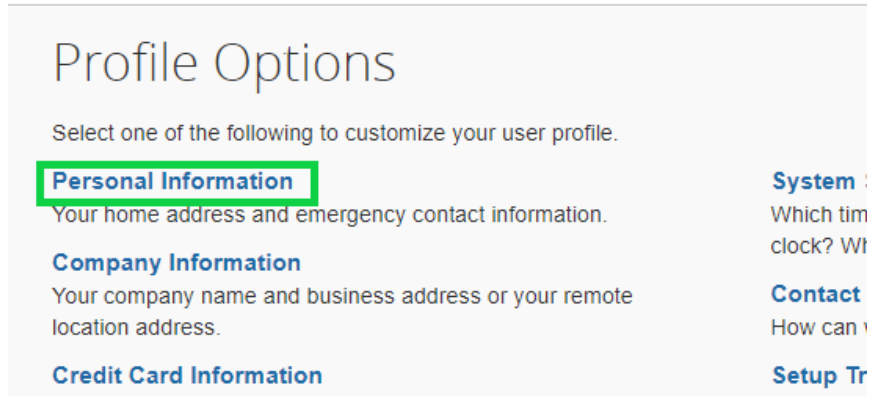


The select **"Profile Settings."**



This will open the "Profile Options" screen.

Select "Personal information."



The screenshot shows the "Profile Options" page. At the top, it says "Select one of the following to customize your user profile." Below this are three main sections: "Personal Information" (highlighted with a green box), "Company Information", and "Credit Card Information". To the right of these sections are three links: "System", "Contact", and "Setup Tr".

On the left side of the screen there is a list of different items in blue.

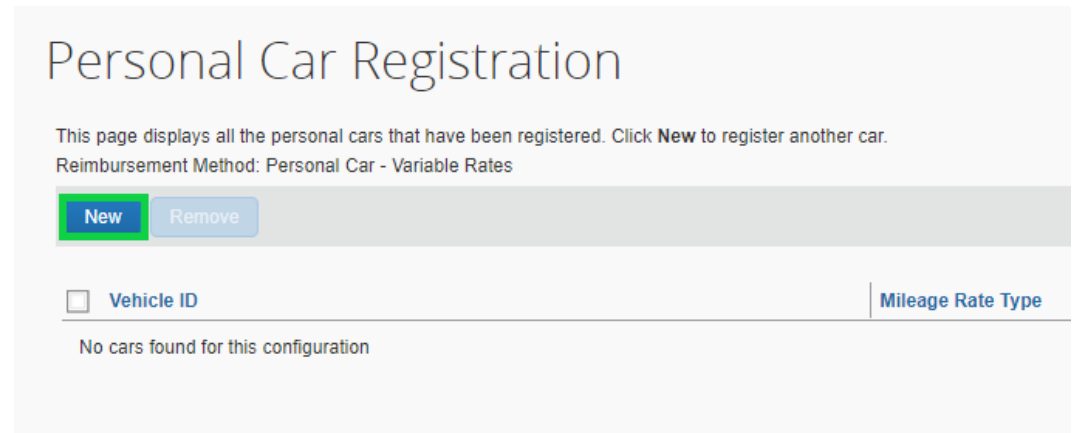
Scroll down until you see the header that reads "Expense Settings."

Under the Expense Settings header select "Personal Car."



The screenshot shows the "Expense Settings" menu. It lists several options: "Expense Information", "Expense Delegates", "Expense Preferences", "Expense Approvers", "Personal Car" (highlighted with a green box), and "Favorite Attendees".

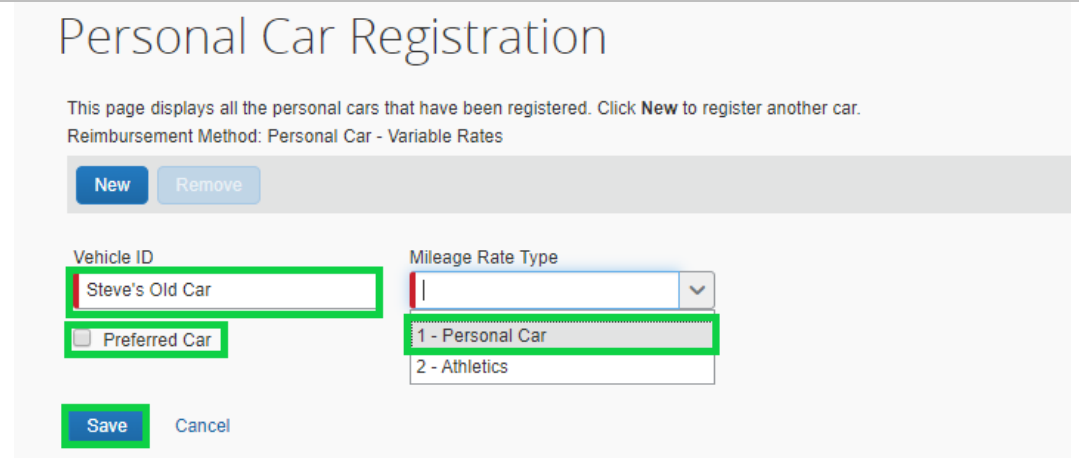
Click "New."



The screenshot shows the "Personal Car Registration" page. It has a header "Personal Car Registration" and a sub-header "This page displays all the personal cars that have been registered. Click **New** to register another car." Below this is a "Reimbursement Method: Personal Car - Variable Rates" section. There are two buttons: "New" (highlighted with a green box) and "Remove". Below the buttons is a table with two columns: "Vehicle ID" and "Mileage Rate Type". The table is currently empty, with the text "No cars found for this configuration" below it.

Under Vehicle ID, you have the option of typing in your license plate number or a name for the car you will be using. What you type there doesn't matter too much, but you must type something.

Under **Mileage Rate Type** select "Personal Car."



The screenshot shows the "Personal Car Registration" form. It has a header "Personal Car Registration" and a sub-header "This page displays all the personal cars that have been registered. Click **New** to register another car." Below this is a "Reimbursement Method: Personal Car - Variable Rates" section. There are two buttons: "New" and "Remove". Below the buttons are two input fields: "Vehicle ID" and "Mileage Rate Type". The "Vehicle ID" field contains "Steve's Old Car" (highlighted with a green box). The "Mileage Rate Type" field is a dropdown menu with "1 - Personal Car" selected (highlighted with a green box). Below the input fields is a "Preferred Car" checkbox. At the bottom are "Save" (highlighted with a green box) and "Cancel" buttons.

You will now see your car appear under "Vehicle ID." "Personal Car" will appear listed under "Mileage rate Type."

## Personal Car Registration

This page displays all the personal cars that have been registered. Click **New** to register another car.  
Reimbursement Method: Personal Car - Variable Rates

<input type="button" value="New"/>	<input type="button" value="Remove"/>
<input type="checkbox"/> Vehicle ID	Mileage Rate Type
<input type="checkbox"/> Steve's Old Car	1 - Personal Car

### Part 2

## Creating a Request for Local and Callback Mileage (before traveling)

Now that you've successfully added your car, select "Requests" in the upper black toolbar.

The screenshot shows the SAP Concur user profile page. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Approvals', and 'Reports'. The 'Requests' menu item is highlighted with a green box. Below the navigation bar, there are tabs for 'Profile', 'Personal Information', 'System Settings', and 'Concur Mobile Registration'. The 'Personal Information' tab is active, showing a sidebar with 'Your Information' (Personal Information, Company Information, Contact Information, Email Addresses, Emergency Contact, Credit Cards) and 'Travel Settings' (Travel Preferences). The main content area is titled 'Personal Car Registration' and contains the same information as the first screenshot, including the 'New' and 'Remove' buttons and the list of cars.

Choose "New Request."

The screenshot shows the SAP Concur 'Active Requests' page. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Approvals', and 'Reports'. The 'Requests' menu item is highlighted with a green box. Below the navigation bar, there are tabs for 'Manage Requests', 'New Request', 'Process Requests', and 'Quick Search'. The 'New Request' menu item is highlighted with a green box. The main content area is titled 'Active Requests (0)' and contains a 'View' dropdown menu, search filters for 'Request Name' and 'Begins With', and a table with columns for 'Request Name', 'Request ID', and 'Status'. The table is currently empty, showing 'No requests found'.

This will open the **“Request Header”** screen.

**A.** Under **request/trip name**, create a title that refers to local mileage.

**B.** If you will be frequently traveling for HSU business, it's suggested that your **travel start date** and **end date** encompass the entire semester or year. You'll only have to get request approval once. You can create multiple expense reports off this single request.

**C.** Under **trip purpose** choose **“Mileage/ Parking Only.”**

**D.** Under the **comments** section provide a brief description about the purpose of your local travel.

When the fields have been completed, click **save** in the upper right.

Request

Cancel Save Print

Request/Trip Name:  
Request Header Segments Expenses Approval Flow Audit Trail

Request/Trip Name: Local Miles/ Teacher Supervision Trip Type: 1-In-State Travel Start Date: 01/01/2020 Travel End Date: 06/01/2020

Traveler Type: 1-Faculty Trip Purpose: Mileage/ Parking Only If Faculty, is class covered?: Yes Personal Dates of Travel-If none enter NA?: NA

Final Destination Country: UNITED STATES Are you travelling to a banned state?: No Comments To/From Approvers/Processors: This is a local mileage request for the whole semester. I will be traveling throughout the county and supervising student teachers.

Business Unit: (HMCMP) HMCMP - Humboldt State Uni Fund: (HM500) HM500 - OPERATING FUND Department: (D30003) D30003 - ACCOUNTS PAYABL Program: Project:

This will bring you to **Segments**, but you can skip it because it's not necessary for local mileage.

Move on to the **Expenses** section.

This is where you will add your projected mileage for the semester or year.

SAP Concur Requests Travel Expense Approvals

Manage Requests New Request Process Requests Quick Search

## Request 47RD

Request/Trip Name: Local Miles/ Teacher Supervision

Request Header Segments **Expenses** Approval Flow Audit Trail

Add Segment

CLICK ICON TO CREATE SEGMENT

Once in “**Expenses**,” select “**Personal Car Mileage**.”

## Request 47RD

Request/Trip Name: Local Miles/ Teacher Supervision

Request Header Segments **Expenses** Approval Flow Audit Trail

[+ New Expense](#) [Delete](#) <<

<input type="checkbox"/>	Date	Expense Type	Amount	Requested
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Expense Type:

To create a new expense, click the existing expense, click the expense

- 01. Travel Expenses
  - Incidentals
  - 02. Personal Car Mileage**
  - 03. Transportation
    - Ground Transportation
    - Parking/Tolls

Add in the distance you expect to travel throughout the range of your **travel start** and **end date**.

Use the **comment** section to add details about the purpose of your travel.

Click **“save”** when done.

The screenshot shows a form for creating an expense request. The following fields are highlighted with green boxes: Expense Type (02. Personal Car Mileage), Travel Start Date (01/01/2020), Travel End Date (06/01/2020), Distance (600), Mileage Rate (0.575), and the Comments section. The comment text is: "I expect travel a total of 600 miles over the course of the semester supervising student teachers across the county." At the bottom right, there are buttons for "Save", "Allocate", and "Cancel".

You will see the **Personal Car Mileage** expense show up on the left side of the screen, along with the dollar amount you can expect to receive.

*The dollar amount is automatically calculated by multiplying expected travel distance by the mileage reimbursement rate of 0.575.*

The screenshot shows the summary page for "Request 47RD". The request name is "Local Miles/ Teacher Supervision". There are tabs for "Request Header", "Segments", "Expenses", "Approval Flow", and "Audit Trail". A table lists the expenses:

Date	Expense Type	Amount	Requested
01/01/2020	02. Personal Car Mileage	\$345.00	\$345.00

Now you are ready to select **“Submit Request”** in the upper right hand corner.

Your request will be reviewed by the Cost Object Approver in your area and your Supervisor.

Once it's approved, you can begin creating Expense Reports for reimbursements.

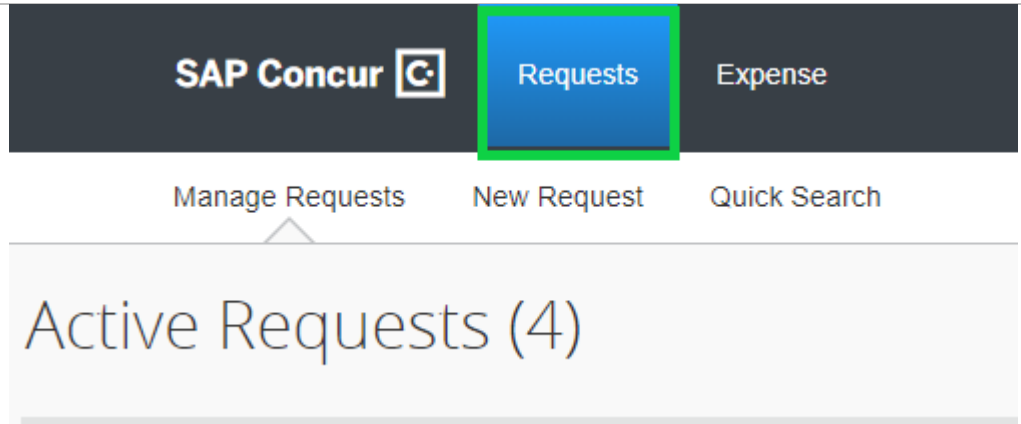
The screenshot shows the bottom of the request page. There are four buttons: "Attachments", "Print / Email", "Delete Request", and "Submit Request" (which is highlighted with a green box). Below the buttons, the status is "Status: Not Submitted" and the amount is "Amount: \$345.00".

### Part 3

## Creating an Expense Report for Local and Callback Mileage (after traveling)

Creating and Submitting an expense report for local mileage allows you to receive a reimbursement for out of pocket costs associated with using your personal car.

To create an expense report, begin by selecting "Requests" in the upper black toolbar.

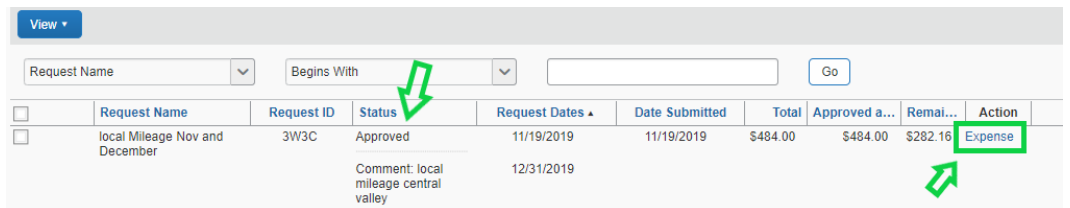


Find your trip Request.

If your Request has been approved, you will see "Expense" on the far right of the screen. Select "Expense."

This will link your expense report to your original request.

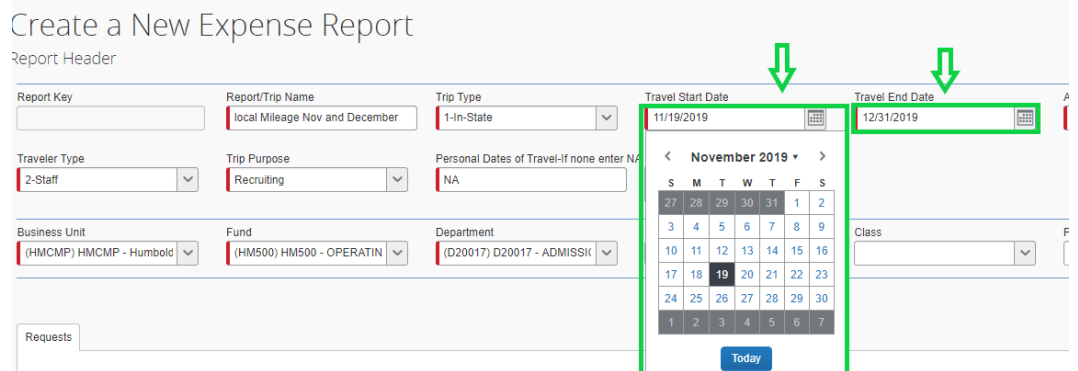
Each month, return to this section to create a new expense report based off your original request.



The screenshot shows a table of requests. The table has columns for Request Name, Request ID, Status, Request Dates, Date Submitted, Total, Approved a..., Remai..., and Action. A row is highlighted with a green box around the "Expense" link in the Action column. Green arrows point to the "Status" column and the "Expense" link.

	Request Name	Request ID	Status	Request Dates	Date Submitted	Total	Approved a...	Remai...	Action
<input type="checkbox"/>	local Mileage Nov and December	3W3C	Approved	11/19/2019 12/31/2019	11/19/2019	\$484.00	\$484.00	\$282.16	Expense

This will open the **Report Header**. Change the travel start and end date to encompass the month that you'll be receiving reimbursement.



The screenshot shows the "Create a New Expense Report" form. The "Report Header" section includes fields for Report Key, Report/Trip Name, Trip Type, Travel Start Date, and Travel End Date. The "Travel Start Date" and "Travel End Date" fields are highlighted with green boxes. A calendar for November 2019 is displayed, with the 19th and 31st highlighted. Green arrows point to the "Travel Start Date" and "Travel End Date" fields.

Report Header

Report Key: [ ] Report/Trip Name: local Mileage Nov and December Trip Type: 1-In-State

Travel Start Date: 11/19/2019 Travel End Date: 12/31/2019

Traveler Type: 2-Staff Trip Purpose: Recruiting Personal Dates of Travel-If none enter NA: NA

Business Unit: (HMCMP) HMCMP - Humboldt Fund: (HM500) HM500 - OPERATIN Department: (D20017) D20017 - ADMISSIK

Class: [ ]

Requests: [ ]

Select “**Next**” in the bottom right corner of this section.

Request Total	Amount Approved	Amount Remaining
\$484.00	\$484.00	\$282.16

Next >>
Cancel

This will open the Expense Report screen.

### local Mileage Nov and December

+ New Expense
Import Expenses
Details ▾
Receipts ▾
Print / Email +

Expenses Move ▾ Delete Copy View ▾ <<

<input type="checkbox"/>	Date ▾	Expense Type	Amount	Requested
Adding New Expense				
No Expenses Found				

**New Expense**

Expense Type

To create a new expense, click the appropriate expense on the left side of the page.

✔ Recently Used Expense Types

- Dinner - Domestic
- Car Rental Fuel
- Incidentals

All Expense Types

**01. Travel Expenses**

- Hotel/Lodging
- Hotel/Lodging Tax
- Incidentals
- Laundry

**02. Personal Car Mileage**

- Personal Car Mileage
- Personal Car Mileage Reduction

This will open a gray box on the right side of the screen.

Select **from** and **to location**. If you traveled to multiple locations, choose a location that you most frequently traveled to.

Notice that “payment type” automatically says “**Out of Pocket**,” which means you’ll be receiving a reimbursement.

Add a **comment** about where you traveled this month.

In order to calculate your distance traveled, select the “**Mileage Calculator**” in the bottom right of the screen.

**New Expense** Available Receipts

Expense Type <span style="border: 1px solid green; padding: 2px;">Personal Car Mileage</span> ▾	Transaction Date 12/01/2019	From Location <span style="border: 1px solid green; padding: 2px;">Arcata, CA</span>
To Location <span style="border: 1px solid green; padding: 2px;">Ferndale, CA</span>	Payment Type Out of Pocket ▾	Distance : Amount (Required field) <input style="border: 1px solid red;" type="text"/> : 0.00 USD ▾
Comments To/From Approvers/Processors <span style="border: 1px solid green; padding: 2px;">I traveled from Arcata to Ferndale on multiple occasions in December.</span>		

Vehicle ID <span style="border: 1px solid green; padding: 2px;">8LPU165</span> ▾	Number of Passengers <input type="text" value="0"/>	Distance to Date: <input type="text" value="0"/>
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Request  
11/19/2019, \$464.00 - local Mi ▾

Mileage Calculator
Save Allocate Attach Receipt Cancel



Add Waypoints to the map. Indicate the locations you traveled to and from for business throughout the month.

The total distance will automatically calculate. When you've added all your waypoints, select **"Add Mileage to Expense"** in the bottom right of the screen.

Mileage Calculator

Waypoints

- Arcata, CA, USA
- Ferndale, CA 95536, USA
- 1 Harpst Street, Arcata, CA 95521, US
- Ferndale, CA 95536, USA
- 1 Harpst Street, Arcata, CA 95521, US
- Ferndale, CA 95536, USA
- 1 Harpst Street, Arcata, CA 95521, US

Map

Directions

TOTAL PERSONAL 0.0 MI

TOTAL BUSINESS 168.2 MI

Google

Add Mileage to Expense

You will notice that the total distance traveled throughout the month auto-populates in the **"Distance"** field, and the reimbursement will appear in the **"Amount"** field.

Now you can click **"Save."**

View Reimbursement Rates

Expense Type: Personal Car Mileage

Transaction Date: 12/01/2019

From Location: Arcata, CA, USA

To Location: 1 Harpst Street, Arcata, CA 95521, US

Payment Type: Out of Pocket

Distance: Amount (Required field)

168 : 97.44 USD

Comments To/From Approvers/Processors

I traveled from Arcata to Ferndale on multiple occasions in December.

Vehicle ID: 8LPU165

Number of Passengers: 0

Distance to Date: 0

Request: 11/19/2019, \$464.00 - local Mi

Save Allocate Attach Receipt Cancel

This new expense will appear on the left side of your expense report.

local Mileage Nov and December

+ New Expense Import Expenses Details Receipts Print / Email

Expenses

Date	Expense Type	Amount	Requested
12/01/2019	Personal Car Mileage	\$97.44	\$97.44

Now you are ready to click **"Submit Report"** in the upper right hand section of the screen.

Delete Report

Submit Report