Concur 2.0 – Guide for Submitters

To expense your travel card charges and claim out-of-pocket reimbursement for a business trip, you will need to create an expense report. The report submission process involves the following four basic steps.

1. Create a Report

2. Complete the Report

3. Attach Your Receipts

4. Submit the Report

Additional considerations:

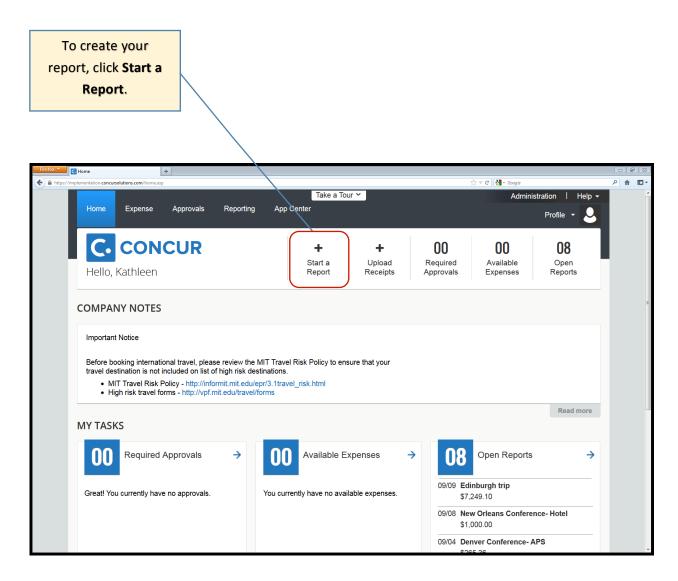- What if the traveler owes MIT money?
- Using a Guest Profile

For assistance:

Travel Services, Office of the Vice President for Finance

travelsupport@mit.edu
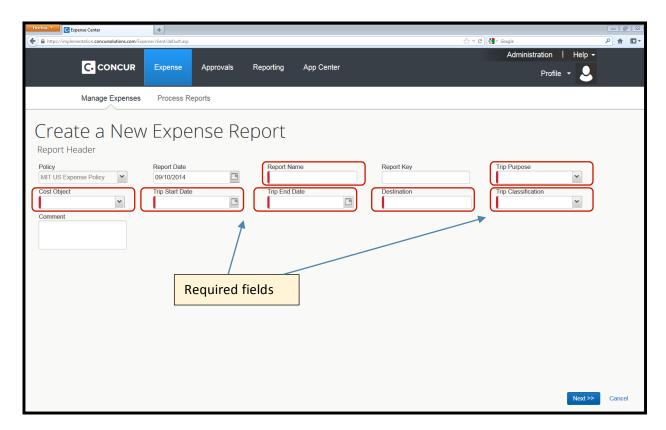
617-253-8366

1. Create a Report

To create your report, click **Start a Report**.

This will bring you to the report header. You will need to fill out all the fields that have a red tab on the left-hand side before you can click **Next**.

Report Name: This is an open field. Please enter a combination of the trip purpose, destination and any other helpful, identifying text.

Trip Purpose: This is a drop-down menu. Select the most appropriate trip purpose. Some of the options map to the unallowable GL (general ledger) account and cannot be used with a sponsored cost object. These are fundraising, president travel, prospective student visit, resource development, and retreat. Two options are taxable: house hunting and relocation. All the other options are allowable and non-taxable.

Cost Object: Type in the appropriate cost object for your trip and then select it from the drop-down menu. If you need the report to be charged to more than one cost object, you may allocate it accordingly once you are in the body of the report.

Trip Start and End Dates: You can type the date in the format of 09/10/2014 or click on the calendar icon and select your start and end dates. These should be the departure and return dates from Boston or the city the traveler is based in.

Destination: Type in the city and either state (domestic) or country (international). If multiple cities were included, type them in the format: Dallas/San Francisco/Portland.

Trip Classification: Select domestic or international. If a trip has a domestic stop in addition to an international destination, select **international**.

Comment Field: Although this is not a required field, it is a good place to enter any additional information that should be in the record or that will help your approver or MIT Travel Services review the report.

Report Name: Include the destination, purpose and any other useful information.

Trip Purpose: Click on the most appropriate selection from the drop-down menu.

Cost Object: Type in the cost object and select it from the drop-down menu.

Expense | Approvals | Reporting | App Center

Manage Expenses | Process Reports

Create a New Expense Report
Report Header

Policy
MIT US Expense Policy

Report Date
09/10/2014

Report Name
Denver Conference- APS

Report Key

Trip Purpose
Conference

Cost Object
1 | 16335

Trip Start Date

Trip End Date

Destination

Trip Classification

Type to search by:
○ Text ● Code
(Code) Text

(1502309) EXEC ED-PROFESSIONAL DEVELOPMENT
(1200000) E17-310,310A,ETC C.C.B.
(1581701) BULOVIC START-UP
(1682400) I L P MANUFACTURING
(1502309-C-P121030) EXECUTIVE PROGRAMS

(1633500) VPF-M&S
(1633501) CASHIERS OFFICE FEES

Next >> Cancel

Reporting   App Center

Administration | Help ▾

Profile ▾

Create a New Expense Report

Report Header

Policy
MIT US Expense Policy

Report Date
09/11/2014

Report Name
Denver Conference- APS

Report Key

Trip Purpose
Conference

Cost Object
(1633500) VPF-M&S

Trip Start Date

Trip End Date

Destination

Trip Classification

Comment

September 2014 ▾

S	M	T	W	T	F	S
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

Today

Next >>   Cancel

Firefox ▾   Expense Center   +

https://implementation.concursolutions.com/Expense/client/

Google

C. CONCUR   Exp

Administration | Help ▾

Profile ▾

Manage Expenses   Pro

Create a New Expense Report

Report Header

Policy
MIT US Expense Policy

Report Date
09/10/2014

Report Name
Denver Conference- APS

Report Key

Trip Purpose
Conference

Cost Object
1 (1633500) VPF-M&S

Trip Start Date
09/02/2014

Trip End Date
09/04/2014

Destination
Denver, CO

Trip Classification
Domestic

Comment

Next >>   Cancel

2. Complete the Report

This will bring you to the body of your expense report. This is where you will **import** any travel card charges from your trip, **add** any out-of-pocket expenses, **edit/itemize/allocate** those expenses as needed, then attach receipts and **submit** your report.

To add travel card charges from this trip to your report, click **Add Card Charges**.

Your available travel card charges will appear. If all the charges are from this trip, click the check box at the top to select them all at once.

CONCUR | Expense

Manage Expenses | View Transactions

Denver Conference- APS

Delete Report | Submit Report

+ New Expense | + Quick Expenses | Add Card Charges | Details ▼ | Receipts ▼ | Print ▼

Expenses

Move ▼ | Delete | Copy | View ▼ «

☐	Date ▼	Expense	Amount	Requested
Adding New Expense				

TOTAL AMOUNT	TOTAL REQUESTED
$0.00	$0.00

Available Expenses ✕

All Cards ▼ | Import ▼ | Delete

☑	Expense Detail	Expense	Source	Date ▲	Amount
☑	U.S. Airways CHICAGO, IL	Airfare	⊖	08/28/2014	$356.20
☑	RAMADA POWAI MUMBAI	Hotel/Motel/B&B	⊖	08/28/2014	INR 3,969.00
☑	AMRELI MUMBAI	Meals (Breakfast/Lun…	⊖	08/28/2014	INR 270.00
☑	CHACARERO CHILEAN CUI…	Meals (Breakfast/Lun…	⊖	08/28/2014	$10.76
☑	BANK OF AMERICA	Undefined	⊖	08/28/2014	$540.00
☑	BANK OF AMERICA	Undefined	⊖	08/28/2014	$500.00
☑	AGENT FEE 8900624753242…	Airfare	⊖	08/28/2014	$34.00
☑	JETBLUE 2797489522653 C…	Airfare	⊖	08/28/2014	$123.10
☑	U.S. Airways CAMBRIDGE, MA	Airfare	⊖	08/28/2014	$195.78
☑	GOGOAIR.COM 877-350-00…	Undefined	⊖	08/29/2014	$9.95
☑	TAXICHARG WASHINGTON…	Taxi	⊖	08/29/2014	$19.34

If the charges are from multiple trips, select the ones from this trip and then click **Move**.

The charges you selected will now move to your expense list.

When the charges are moved you may see red warning icons on some expense line items. This is something that needs to be edited before you can submit the report.

In this example the warning says "Missing required field: Alcohol." You will need to confirm whether the meal included any alcohol and save the expense to remove the warning message.

To indicate whether the meal included alcohol, click on the line item to bring up the expense detail, then click the alcohol drop-down and select **No** or **Yes**. Then click **Save**.

Note: If you select **Alcohol-Yes**, you will need to itemize the alcohol. Instructions for itemizing are included later in this guide.

Once you have moved your travel card charges, you can begin entering any out-of-pocket expenses. To enter out-of-pocket expenses, click **New Expense**.

New Expense Window

Expense List

Denver Conference- APS

Delete Report

New Expense   Quick Expenses   Add Card Charges   Details ▾   Receipts ▾   Print ▾

Expenses

Move ▾   Delete   Copy   View ▾   «

	Date ▾	Expense	Amount	Requested
		Adding New Expense		
☐	09/24/2014	**Airfare** UNITED 0167494894220, 800-932-:	$337.00	$337.00
☐	09/21/2014	**Taxi** UBER, 866-576-1039, CA	$16.63	$16.63
☐	09/21/2014	**Meals (Breakfast/Lunch/Dinner)** DUNKIN #340212 Q35, E BOSTON	$4.28	$4.28
☐	09/20/2014	**Taxi** UBER, 866-576-1039, CA	$30.82	$30.82

	TOTAL AMOUNT	TOTAL REQUESTED
	$388.73	$388.73

New Expense   Receipt Store

Expense [   ]

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

✅ Recently Used Expense Types

Meals (Breakfast/Lunch/Dinner)   Airfare
Entertainment-Other   Conference
Business Meeting/Meal (attendees)

All Expense Types

A.Transportation	...E.Communications
Agency Fee	Long Distance
Airfare	**F.Per Diem**
Airline Change Fee	Domestic Per Diem
Baggage Fee	International Per Diem
Bus	**G.Business Promotions**
Car Rental	Misc. Promotional Expense

Administration | Help ▾
Profile ▾

Type in the expense type and click on it or locate it by scrolling through the expense type list.

Administration | Help ▾
Profile ▾

Approvals   Reporting   App Center

s Reports

Denver Conference- APS

Delete Report   Submit Report

New Expense   Quick Expenses   Details ▾   Receipts ▾   Print ▾

Expenses

Move ▾   Delete   Copy   View ▾   «

	Date ▾	Expense	Amount	Requested
☐		*Adding New Expense*		

	TOTAL AMOUNT	TOTAL REQUESTED
	$0.00	$0.00

New Expense   Receipt Store

Expense [ai   ]

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

✅ Recently Used Expense Types

Airfare   Meals (Breakfast/Lunch/Dinner)
Business Meeting/Meal (attendees)   Hotel/Motel/B&B
Non Recoverable Expenses

All Expense Types

A.Transportation	D.Entertainment
Airfare	Entertainment-Other
Airline Change Fee	
Train	

Fill in all the required fields (fields with red tabs on the left side) and add any relevant comments.

This brings up the Expense Detail window.

Firefox — Expense Center

https://implementation.concursolutions.com/Expense/client/default.asp

Administration | Help ▾

CONCUR   Expense   Approvals   Reporting   App Center

Profile ▾

...s Reports

...ce- APS

...etails ▾   Receipts ▾   Print ▾

Move ▾   Delete   Copy   View ▾   «

Amount   Requested

New Expense   Receipt Store

Expense Type   Transaction Date
Airfare   08/28/2014

Business Purpose   Ticket Number (or PNR Number)

Vendor   Airline Travel Class of Service
American Airlines   1.Coach

City   Payment Type
                             Out of Pocket

Amount
560.00   USD   ☐ Personal Expense (do not reimburse)

Comment

TOTAL AMOUNT   TOTAL REQUESTED
$0.00 $0.00

Save   Itemize   Allocate   Attach Receipt   Cancel

As you enter expenses and amounts, they will populate the Expense List.

If you have multiple out-of-pocket expenses in small-dollar amounts, you can combine them. Make sure to include a comment indicating how many are included and attach all required receipts.

Firefox — Expense Center

https://implementation.concursolutions.com/Expense/client/default.asp

Administration | Help ▾

...se   Approvals   Reporting   App Center

Profile ▾

...ss Reports

...ce- APS   Delete Report   Submit Report

...etails ▾   Receipts ▾   Print ▾

Expenses   Move ▾   Delete   Copy   View ▾   «

☐   Date ▾   Expense   Amount   Requested

Adding New Expense

☐   08/28/2014   Airfare $560.00 $560.00
                 American Airlines

☐   08/28/2014   Hotel/Motel/B&B $450.00 $450.00

☐   08/28/2014   Car Rental $190.00 $190.00
                 Budget

New Expense   Receipt Store

Expense Type   Transaction Date
Taxi   08/28/2014

City   Payment T...
Denver, Colorado   Out of Po...

Amount   ☐ Person...
120.00   USD

Comment
6 taxis in Denver.

TOTAL AMOUNT   TOTAL REQUESTED
$1,200.00 $1,200.00

Save

After adding a comment to an expense, a comment icon will appear on that line item. Hover over it to see the comment.

Administration | Help ▾

Profile ▾

ce- APS

ss Reports

Delete Report | Submit Report

New Expense ▾ | Quick Expenses | Details ▾ | Receipts ▾ | Print ▾

Expenses

Move ▾ | Delete | Copy | View ▾ | «

New Expense

Receipt Store

	Date ▾	Expense	Amount	Requested
Adding New Expense				
☐	08/28/2014	**Airfare** American Airlines	$560.00	$560.00
☐	08/28/2014	**Hotel/Motel/B&B**	$450.00	$450.00
☐	08/28/2014	**Car Rental** Budget	$190.00	$190.00
☐	08/28/2014	**Taxi** Denver, Colorado	$120.00	$120.00

Expense

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

✔ **Recently Used Expense Types**

Taxi   Car Rental
Hotel/Motel/B&B   Airfare
Meals (Breakfast/Lunch/Dinner)

All Expense Types

...E.Communications
  Long Distance
F.Per Diem
  Domestic Per Diem
  International Per Diem
G.Business Promotions
  Misc. Promotional Expense

Comment History   ✕

Date ▾	Entered By	Comment Text
09/10/2014	McGrath, Kathleen	6 taxis in Denver.

$1,320.00 $1,320.00

When you enter a meal, Concur will ask you to confirm whether there was alcohol. If there was, click **Alcohol-Yes**.

Firefox ▾ | Expense Center | +

Administration | Help ▾

Profile ▾

Denver Conference- APS

Delete Report | Submit Report

New Expense ▾ | Quick Expenses | Details ▾ | Receipts ▾ | Print ▾

Expenses

Move ▾ | Delete | Copy | View ▾ | «

New Expense

Receipt Store

	Date ▾	Expense	Amount	Requested
Adding New Expense				
☐	08/28/2014	**Airfare** American Airlines	$560.00	$560.00
☐	08/28/2014	**Hotel/Motel/B&B**	$450.00	$450.00
☐	08/28/2014	**Car Rental** Budget	$190.00	$190.00
☐	08/28/2014	**Taxi** Denver, Colorado	$120.00	$120.00

Expense Type
Meals (Breakfast/Lunch/Di ▾

Alcohol ⬚?
Y ▾

Transaction Date
08/28/2014

City

Payment Type
Out of Pocket ▾

Amount
50.00   USD ▾

Vendor Name

Number of Meals ⬚?

☐ Personal Expense (do not reimburse)

Comment

Then, click **Itemize**.

TOTAL AMOUNT   TOTAL REQUESTED
$1,320.00 $1,320.00

Save | Itemize | Allocate | Attach Receipt | Cancel

The Itemization Wizard will appear.

Denver Conference- APS

New Expense | Quick Expenses | Details ▾ | Receipts ▾ | Print ▾

Exceptions

Expense	Date	Amount	Exception
Meals (Breakfa...	08/28/2014	$50.00	You must itemize this expense and separate out the alcohol portion of the charge. (Note: Alcohol can not be charged to a WBS Account.)

Expenses

Move ▾ | Delete | Copy | View ▾ | Expense | Meals

Total Amount: $50.00 | Itemized: $50.00 | Remaining: $0.00

Enter the meal and alcohol totals so "Remaining" equals $0.

	Date ▾	Expense
	08/28/2014	Hotel/Motel/B&B
	08/28/2014	Car Rental / Budget
	08/28/2014	Taxi / Denver, Colorado
	08/28/2014	Meals (Breakfast/Lunch/Dinner)

You must itemize this expense and separate out the alcohol... Alcohol can not be charged to a WBS Account.)

Amount — Personal Expense (do not reimburse)
Meals (Breakfast/Lunch/Dinner) 40.00
Alcohol 10.00

...n optionally enter amounts for these expenses, too.

Dependent Care

Then, click Save Itemizations.

TOTAL AMOUNT $1,370.00   TOTAL REQUESTED $1,370.00

Save Itemizations | Cancel

Administration | Help ▾
Profile ▾

Denver Conference- APS

Delete Report | Submit Report

Quick Expenses | Details ▾ | Receipts ▾ | Print ▾

This arrow indicates an itemized expense. Click on it to show or hide the itemizations.

Move ▾ | Delete | Copy | View ▾ | Itemization

Total Amo...

		Expense	Amount	Requested
		...rfare / American Airlines	$560.00	$560.00
		...tel/Motel/B&B	$450.00	$450.00
	08/28/2014	Car Rental / Budget	$190.00	$190.00
	08/28/2014	Taxi / Denver, Colorado	$120.00	$120.00
⌄	08/28/2014	Meals (Breakfast/Lunch/Dinner)	$50.00	$50.00
✔	08/28/2014	Alcohol	$10.00	$10.00
	08/28/2014	Meals (Breakfast/Lunch/Dinner)	$40.00	$40.00

Expense Type: Alcohol
Transaction Date: 08/28/2014
Business Purpose:
Vendor Name:
City:
Payment Type: Out of Pocket
Amount: 10.00 USD
Personal Expe...
Comment:

If you entered a sponsored cost object in the report header, you will need to allocate the alcohol to a non-sponsored cost object. To do so, click Allocate.

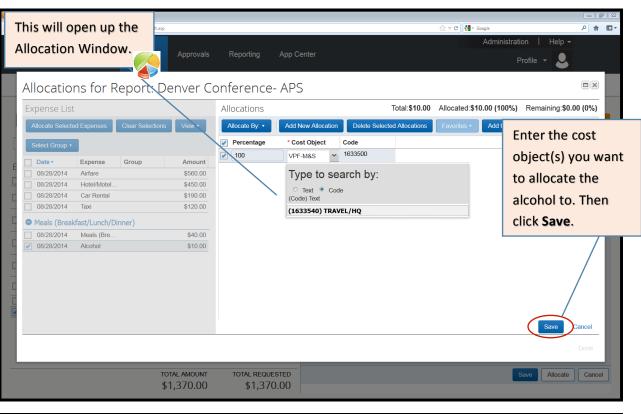TOTAL AMOUNT $1,370.00   TOTAL REQUESTED $1,370.00

Save | Allocate | Cancel

This will open up the Allocation Window.

Allocations for Report: Denver Conference- APS

Expense List

Allocate Selected Expenses | Clear Selections | View ▾

Select Group ▾

Date ▾	Expense	Group	Amount
08/28/2014	Airfare		$560.00
08/28/2014	Hotel/Motel...		$450.00
08/28/2014	Car Rental		$190.00
08/28/2014	Taxi		$120.00
⊖ Meals (Breakfast/Lunch/Dinner)			
08/28/2014	Meals (Bre...		$40.00
08/28/2014	Alcohol		$10.00

Allocations　　Total:$10.00　Allocated:$10.00 (100%)　Remaining:$0.00 (0%)

Allocate By: ▾ | Add New Allocation | Delete Selected Allocations | Favorites ▾ | Add t

☑ Percentage	* Cost Object	Code
☑ 100	VPF-M&S ▾	1633500

Type to search by:

○ Text　● Code
(Code) Text

(1633540) TRAVEL/HQ

Enter the cost object(s) you want to allocate the alcohol to. Then click **Save**.

Save | Cancel

Done

TOTAL AMOUNT	TOTAL REQUESTED
$1,370.00	$1,370.00

Save | Allocate | Cancel

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nce- APS

Delete Report | Submit Report

Details ▾ | Receipts ▾ | Print ▾

Move ▾ | Delete | Copy | View ▾ | «

Hover over the pie chart icon to view the cost object that you have allocated the line item to.

		Amount	Requested
		$560.00	$560.00
		$450.00	$450.00
	Car Rental Budget	$190.00	$190.00
	08/28/2014 **Taxi** Denver, Colorado	$120.00	$120.00
☐ ∨	08/28/2014 **Meals (Breakfast/Lunch/Dinner)**	$50.00	$50.00
☐	08/28/2014 Meals (		
☑	08/28/2014 Alcohol		

Allocations

Percentage	Cost Object	Code
100	(1633500) VPF-...	1633500

Itemization

Total Amount: $50.00 | Itemized: $50.00 | Remaining: $0.00

Expense Type
Alcohol ▾

Transaction Date
08/28/2014

Business Purpose

Vendor Name

City

Payment Type
Out of Pocket ▾

Amount
10.00　USD ▾

☐ Personal Expense (do not reimburse)

Comment

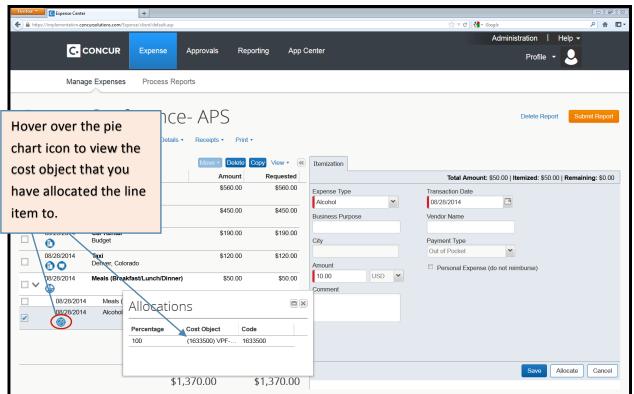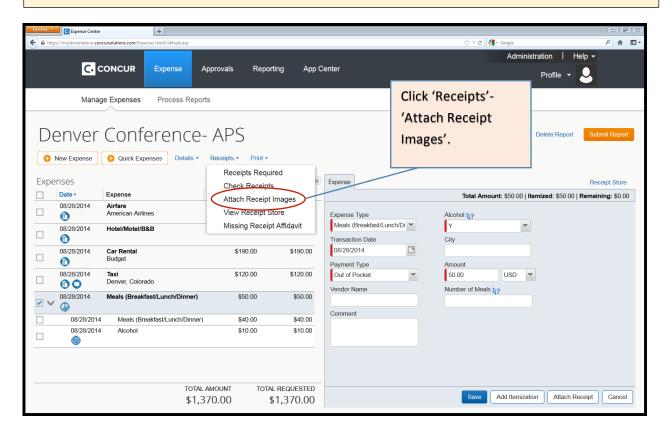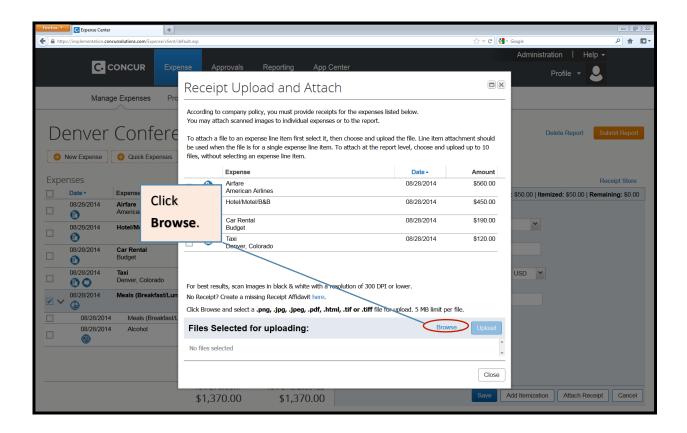|	
$1,370.00	$1,370.00

Save | Allocate | Cancel

3. Attach Your Receipts

Once you have finished editing, itemizing and allocating your expenses, you can attach your receipts. To do so, click Receipts>Attach Receipt Images. You can also attach receipts to an individual line item if needed.
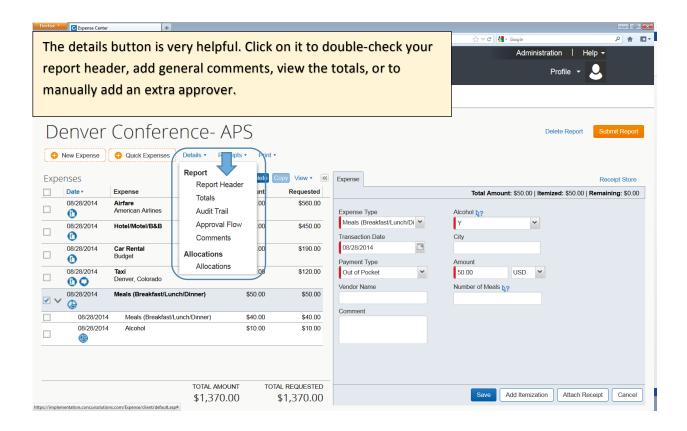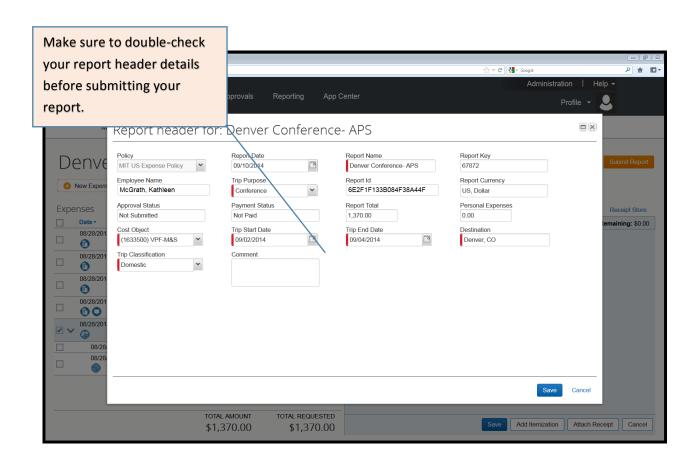
This will open up the Receipt Upload window. The expenses that require receipts are listed within that window. To attach receipt images, click **Browse**, locate the receipt image(s) you need, and then click **Upload**.

Select the receipt image to attach.

Then, click Open.

Libraries ▸ Pictures ▸ Sample Pictures

Search Sample Pictures

New folder

Pictures library
Sample Pictures

Arrange by: Folder ▾

Music
Pictures
Videos

Computer
Windows (C:)
STORE N GO (E:)
k (F:)
(O:)
(P:)
(V:)

Network

Chrysanthemum.jpg
Desert.jpg
Hydrangeas.jpg
Jellyfish.jpg
Koala.jpg
Lighthouse.jpg

Penguins.jpg
SAMPLE RECEIPT IMAGE.docx
SAMPLE RECEIPT IMAGE.pdf
Tulips.jpg

File name:

All Files (*.*)

Open   Cancel

Note: Receipt images must be image files that are less than 5 mb in size.

Firefox   Expense Center

https://implementation.concursolutions.com/Expense/client/default.asp

Google

Administration   Help ▾

CONCUR   Expense   Approvals   Reporting   App Center

Profile ▾

Manage Expenses

Denver Confere

Delete Report   Submit Report

New Expense   Quick Expenses

Receipt Store

$50.00 | Itemized: $50.00 | Remaining: $0.00

Receipt Upload and Attach

According to company policy, you must provide receipts for the expenses listed below.
You may attach scanned images to individual expenses or to the report.

To attach a file to an expense line item first select it, then choose and upload the file. Line item attachment should be used when the file is for a single expense line item. To attach at the report level, choose and upload up to 10 files, without selecting an expense line item.

		Expense	Date ▲	Amount
☐		Airfare American Airlines	08/28/2014	$560.00
☐		Hotel/Motel/B&B	08/28/2014	$450.00
☐		Car Rental Budget	08/28/2014	$190.00
☐		Taxi Denver, Colorado	08/28/2014	$120.00

For best results, scan images in black & white with a resolution of 300 DPI or lower.
No Receipt? Create a missing Receipt Affidavit here.
Click Browse and select a **.png, .jpg, .jpeg, .pdf, .html, .tif or .tiff** file for upload. 5 MB limit per file.

Files Selected for uploading: Browse...   Upload

SAMPLE RECEIPT IMAGE.pdf   Remove

Close

Your receipt image is now attached. Click Close.

Expenses

	Date ▾	Expense
☐	08/28/2014	**Airfare** American Airlines
☐	08/28/2014	**Hotel/Motel/B&B**
☐	08/28/2014	**Car Rental** Budget
☐	08/28/2014	**Taxi** Denver, Colorado
☑ ▾	08/28/2014	**Meals (Breakfast/Lun**
☐	08/28/2014	Meals (Breakfast/L
☐	08/28/2014	Alcohol

USD ▾

$1,370.00 $1,370.00

Save   Add Itemization   Attach Receipt   Cancel

You're almost ready to submit! Just a few more steps.

The details button is very helpful. Click on it to double-check your report header, add general comments, view the totals, or to manually add an extra approver.

Denver Conference- APS

Delete Report   Submit Report

New Expense   Quick Expenses   Details ▾   Receipts ▾   Print ▾

Report
Report Header
Totals
Audit Trail
Approval Flow
Comments

Allocations
Allocations

Expenses

	Date ▾	Expense		Requested
☐	08/28/2014	Airfare American Airlines		$560.00
☐	08/28/2014	Hotel/Motel/B&B	.00	$450.00
☐	08/28/2014	Car Rental Budget	.00	$190.00
☐	08/28/2014	Taxi Denver, Colorado	.00	$120.00
☑ ⌄	08/28/2014	Meals (Breakfast/Lunch/Dinner)	$50.00	$50.00
☐	08/28/2014	Meals (Breakfast/Lunch/Dinner)	$40.00	$40.00
☐	08/28/2014	Alcohol	$10.00	$10.00

TOTAL AMOUNT   TOTAL REQUESTED
$1,370.00 $1,370.00

https://implementation.concursolutions.com/Expense/client/default.asp#

Expense   Receipt Store

Total Amount: $50.00 | Itemized: $50.00 | Remaining: $0.00

Expense Type
Meals (Breakfast/Lunch/Di ▾

Alcohol ▷?
Y ▾

Transaction Date
08/28/2014

City

Payment Type
Out of Pocket ▾

Amount
50.00   USD ▾

Vendor Name

Number of Meals ▷?

Comment

Save   Add Itemization   Attach Receipt   Cancel

Administration | Help ▾

Profile ▾

Make sure to double-check your report header details before submitting your report.

Administration | Help ▾

Profile ▾

Report header for: Denver Conference- APS

Policy
MIT US Expense Policy ▾

Report Date
09/10/2014

Report Name
Denver Conference- APS

Report Key
67872

Employee Name
McGrath, Kathleen

Trip Purpose
Conference ▾

Report Id
6E2F1F133B084F38A44F

Report Currency
US, Dollar

Approval Status
Not Submitted

Payment Status
Not Paid

Report Total
1,370.00

Personal Expenses
0.00

Cost Object
(1633500) VPF-M&S ▾

Trip Start Date
09/02/2014

Trip End Date
09/04/2014

Destination
Denver, CO

Trip Classification
Domestic ▾

Comment

Save   Cancel

Approvals   Reporting   App Center

Denve

New Expens

Expenses
Date ▾

08/28/201

08/28/201

08/28/201

08/28/201

08/28/201

08/28

08/28

Submit Report

Receipt Store

Remaining: $0.00

TOTAL AMOUNT
$1,370.00

TOTAL REQUESTED
$1,370.00

Save   Add Itemization   Attach Receipt   Cancel

4. Submit Report

When you are ready to submit your report, click **Submit Report**.

Click **Close**.

Your report is now marked "Submitted" within the Manage Expenses tab.

If you forgot to add an expense or need to change anything after submitting, click into the report and click **Recall**.

Administration | Help ▾

Profile ▾

Manage Expenses   Process Reports

Denver Conference- APS

Recall   Copy Report

Summary   Details ▾   Receipts ▾   Print ▾

Expenses

View ▾

Date ▾	Expense	Amount	Requested
08/28/2014	**Airfare** American Airlines	$560.00	$560.00
08/28/2014	**Hotel/Motel/B&B**	$450.00	$450.00
08/28/2014	**Car Rental** Budget	$190.00	$190.00
08/28/2014	**Taxi** Denver, Colorado	$120.00	$120.00
08/28/2014	**Meals (Breakfast/Lunch/Dinner)**	$50.00	$50.00

	TOTAL AMOUNT $1,370.00	TOTAL REQUESTED $1,370.00

Summary

Report Summary

Report Totals

	Amount Due Company	Amount Due Employee
	$0.00	$1,370.00

You can recall the report until it has been approved by Travel Services. After Travel Services has approved the report, the Recall button will no longer be visible.

Additional Considerations

What if the traveler owes MIT money?

In this case, the proper procedure is as follows:

- The submitter should note in the Report Header that a check for payment is on its way.

- The check should be payable to MIT. The check and a printout of the MIT Detailed Report (under Print/Email button within the report) should be sent to Travel Services, NE49-4037.

Using a Guest Profile

- Guest profiles are used to reimburse individuals who do not have an account on file with HR/Payroll.

- A guest profile may also be linked to your department's Travel Card. In this circumstance, you would use your guest profile to reconcile your department card charges and reimburse visitors and others who are not set up to receive a direct deposit from MIT.

- An expense report done in a guest profile creates a paper check. Due to this, the report header includes extra fields where you need to input the payee's name and address. NOTE: If you are sending the check to an MIT address, make sure to include 77 Massachusetts Avenue and then the MIT building and room number.

To create a report under your guest profile, first administer for that profile and click **Apply**.

When creating a new report under a guest profile, extra fields will appear in the report header. Everything from Guest Name onward is exactly what will print on a paper check.

Make sure that Guest Name is the payee's legal name and that the address fields list the address you want the check mailed to.

Help ▾

Administer for
GUEST, TRAINING_

xpense R

Policy	Report Date	Report Name	Report Key	Guest Traveler Type
MIT Guest User Expense Po	09/10/2014			

Trip Purpose	Cost Object	Trip Start Date	Trip End Date	Destination

Trip Classification	Guest Name	Guest Address	Guest Address 2	Guest City

Guest Country	Guest State	Postal (ZIP) Code	Comment

Next >>   Cancel