



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**.

The screenshot shows the Concur user interface. At the top, there is a navigation bar with links for Home, Expense, Approvals, Reporting, and App Center. The user is logged in as Kathleen, and the interface displays several key metrics: 00 Required Approvals, 00 Available Expenses, and 08 Open Reports. The 'Start a Report' button is highlighted with a red box. Below the metrics, there is a 'COMPANY NOTES' section with an 'Important Notice' about international travel. At the bottom, there is a 'MY TASKS' section with three cards: 'Required Approvals' (00), 'Available Expenses' (00), and 'Open Reports' (08). The 'Open Reports' card lists three reports: 'Edinburgh trip' (\$7,249.10), 'New Orleans Conference- Hotel' (\$1,000.00), and 'Denver Conference- APS' (\$255.26).

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**.

The screenshot shows the 'Create a New Expense Report' form in the Concur Expense Center. The form is titled 'Create a New Expense Report' and is under the 'Process Reports' section. The 'Report Header' section contains the following fields:

- Policy: MIT US Expense Policy (dropdown)
- Report Date: 09/10/2014 (calendar icon)
- Report Name: (text input, highlighted as required)
- Report Key: (text input)
- Trip Purpose: (dropdown menu, highlighted as required)
- Cost Object: (dropdown menu, highlighted as required)
- Trip Start Date: (calendar icon, highlighted as required)
- Trip End Date: (calendar icon, highlighted as required)
- Destination: (text input)
- Trip Classification: (dropdown menu, highlighted as required)
- Comment: (text area)

A yellow box labeled 'Required fields' has arrows pointing to the Report Name, Trip Start Date, Trip End Date, and Trip Classification fields. At the bottom right, there are 'Next >>' and 'Cancel' buttons.

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.

The screenshot shows a web browser window with a navigation bar containing 'Expense', 'Approvals', 'Reporting', and 'App Center'. Below the navigation bar are tabs for 'Manage Expenses' and 'Process Reports'. The main heading is 'Create a New Expense Report' with a sub-heading 'Report Header'. The form includes several fields: 'Policy' (MIT US Expense Policy), 'Report Date' (09/10/2014), 'Report Name' (Denver Conference- APS), 'Report Key' (crossed out with a blue X), 'Trip Purpose' (Conference), 'Cost Object' (16335), 'Trip Start Date', 'Trip End Date', 'Destination', and 'Trip Classification'. A search dropdown for 'Cost Object' is open, showing a list of codes and descriptions, with '(1633500) VPF-M&S' highlighted. At the bottom right, there are 'Next >>' and 'Cancel' buttons.

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

Trip Start and End Date: Type in or select using the calendar icon on the right side of the field.

Reporting App Center Administration Help Profile

Create a New Expense Report

Report Header

Policy: MIT US Expense Policy

Cost Object: (1633500) VPF-M&S

Report Date: 09/11/2014

Report Name: Denver Conference- APS

Trip Start Date: [Calendar Icon]

Trip End Date: [Calendar Icon]

Report Key: [Empty]

Destination: [Empty]

Trip Purpose: Conference

Trip Classification: [Empty]

Comment: [Empty]

Next >> Cancel

Destination: Type in the city and either state (domestic) or country (international).

CONCUR Expense Center

Management Expenses Profile

Create a New Expense Report

Report Header

Policy: MIT US Expense Policy

Cost Object: 1 (1633500) VPF-M&S

Report Date: 09/10/2014

Trip Start Date: 09/02/2014

Report Name: Denver Conference- APS

Trip End Date: 09/04/2014

Destination: Denver, CO

Trip Purpose: Conference

Trip Classification: Domestic

Comment: [Empty]

Next >> Cancel

Once you have filled out the required fields, click **Next**.

Trip Classification: Select Domestic or International.

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**.

The screenshot displays the Concur Expense Center interface for a report titled "Denver Conference- APS". The navigation bar includes "CONCUR", "Expense", "Approvals", and "App Center". Below the navigation bar, there are tabs for "Manage Expenses", "View Transactions", and "Process Reports". The main content area shows the report title "Denver Conference- APS" and a "Submit Report" button. A callout box points to the "Add Card Charges" button, which is circled in red. The "Add Card Charges" button is located in the "New Expense" section, along with "New Expense" and "Quick Expenses" buttons. Below the "Add Card Charges" button, there is a table with columns for "Date", "Expense", "Amount", and "Requested". The table is currently empty, with the text "No Expenses Found" below it. To the right of the table, there is a "New Expense" form with a text input field for "Expense" and a "Receipt Store" link. Below the form, there is a list of "Recently Used Expense Types" and "All Expense Types". The "Recently Used Expense Types" list includes "Airfare", "Conference", "Personal Car Mileage", "Entertainment-Other", and "Business Meeting/Meal (attendees)". The "All Expense Types" list is organized into columns: "A. Transportation" (Agency Fee, Airfare, Airline Change Fee, Baggage Fee, Bus), "E. Communications" (Long Distance), "F. Per Diem" (Domestic Per Diem, International Per Diem), and "G. Business Promotions". At the bottom of the page, there is a summary table with two columns: "TOTAL AMOUNT" and "TOTAL REQUESTED", both showing "\$0.00".

Denver Conference- APS

[+ New Expense](#) [+ Quick Expenses](#) [Add Card Charges](#) [Details](#) [Receipts](#) [Print](#)

Expenses [Move](#) [Delete](#) [Copy](#) [View](#)

[Date](#) [Expense](#) [Amount](#) [Requested](#)

[Adding New Expense](#)

Available Expenses

All Cards [Import](#) [Delete](#)

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

TOTAL AMOUNT \$0.00
TOTAL REQUESTED \$0.00

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.

Firefox Expense Center
 https://implementation.concursolutions.com/expense/client/default.asp

CONCUR Expense Approvals App Center

Manage Expenses View Transactions Process Reports

Denver Conference- APS

New Expense Quick Expenses Add Card Charges Details Receipts Print

Expenses Move Delete Copy View

Adding New Expense

Expense Detail	Expense	Source	Date	Amount
<input type="checkbox"/>	United Airlines 800-932-2732, TX	Airfare	09/21/2014	\$169.00
<input type="checkbox"/>	United Airlines 800-932-2732, TX	Airfare	09/21/2014	\$295.36
<input type="checkbox"/>	AGENT FEE 8900625689524 T...	Airfare	09/21/2014	\$34.00
<input checked="" type="checkbox"/>	United Airlines 800-932-2732, TX	Airfare	09/21/2014	\$337.00
<input type="checkbox"/>	UBER 866-576-1039, CA	Taxi	09/21/2014	\$8.81
<input checked="" type="checkbox"/>	UBER 866-576-1039, CA	Taxi	09/21/2014	\$16.63
<input type="checkbox"/>	Uber Technologies Inc 866-576...	Taxi	09/21/2014	\$13.34
<input type="checkbox"/>	Uber Technologies Inc 866-576...	Taxi	09/21/2014	\$19.34
<input type="checkbox"/>	BERTUCCIS #002 CAMBRIDG...	Meals (Breakfast/Lunc...	09/21/2014	\$105.56
<input checked="" type="checkbox"/>	DUNKIN #340212 Q35 E BOST...	Meals (Breakfast/Lunc...	09/21/2014	\$4.28
<input type="checkbox"/>	DUNKIN #340212 Q35 E BOST...	Meals (Breakfast/Lunc...	09/21/2014	\$2.35
<input type="checkbox"/>	DINE BOSTON GR00000653 E...	Meals (Breakfast/Lunc...	09/21/2014	\$27.41

TOTAL AMOUNT \$0.00 TOTAL REQUESTED \$0.00

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

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

CONCUR Expense Approvals App Center Administration Help

Manage Expenses View Transactions Process Reports Profile

Denver Conference- APS

New Expense Quick Expenses Add Card Charges Details Receipts Print

Exceptions Delete Report Submit Report

Hide Exceptions

Expense	Date	Amount	Exception
Meals (Breakfa...	09/21/2014	\$4.28	Missing rec...

Expenses Receipt Store

Adding New Expense

Date	Expense	Amount	Requested
09/21/2014	Airfare UNITED 0167494894220, 800-932-		
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 \$388.73 TOTAL REQUESTED \$388.73

Smart Expenses

The selected items have been successfully imported as expenses.

Never show this prompt again

OK

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.

The screenshot shows the 'Denver Conference- APS' report in the Concur Expense Center. At the top, there are navigation tabs for 'Expense', 'Approvals', and 'App Center'. Below that, there are links for 'View Transactions' and 'Process Reports'. The main content area is titled 'Denver Conference- APS' and includes buttons for 'Delete Report', 'Submit Report', 'Add Card Charges', 'Details', 'Receipts', 'Print', and 'Hide Exceptions'. A table titled 'Exceptions' is displayed, with columns for 'Expense', 'Date', 'Amount', and 'Exception'. One row shows a meal expense for 09/21/2014 with an amount of \$4.28 and a red warning icon next to the text 'Missing required field: Alcohol.' Below the exceptions table is a table of 'Expenses' with columns for 'Date', 'Expense', 'Amount', and 'Requested'. The meal expense is highlighted with a red box and a red warning icon. To the right of the expenses table is a 'New Expense' form with a dropdown for 'Expense Type' and a 'Recently Used Expense Types' list.

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.

The screenshot shows the 'Expense' detail form for the meal expense. The form has a dropdown for 'Expense Type' set to 'Meals (Breakfast/Lunch/Dinner)'. Below that are fields for 'Transaction Date' (09/21/2014), 'Payment Type' (Bank of America - CBCP), 'Vendor Name' (DUNKIN #340212 Q35), and 'Amount' (4.28 USD). There is a dropdown for 'Alcohol?' with 'No' selected. Below the form are buttons for 'Save', 'Itemize', 'Allocate', 'Attach Receipt', and 'Cancel'. A red box highlights the 'Save' button. A callout box points to the 'Alcohol?' dropdown.

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

Date	Expense	Amount	Requested
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: \$388.73
TOTAL REQUESTED: \$388.73

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

Date	Expense	Amount	Requested
------	---------	--------	-----------

TOTAL AMOUNT: \$0.00
TOTAL REQUESTED: \$0.00

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.

Expense Type: Airfare
 Transaction Date: 08/28/2014
 Business Purpose: [Empty]
 Ticket Number (or PNR Number): [Empty]
 Vendor: American Airlines
 Airline Travel Class of Service: 1.Coach
 City: [Empty]
 Payment Type: Out of Pocket
 Amount: 560.00 USD
 Comment: [Empty]

TOTAL AMOUNT: \$0.00
 TOTAL REQUESTED: \$0.00

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.

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

Expense Type: Taxi
 Transaction Date: 08/28/2014
 City: Denver, Colorado
 Payment Type: Out of Pocket
 Amount: 120.00 USD
 Comment: 6 taxis in Denver.

TOTAL AMOUNT: \$1,200.00
 TOTAL REQUESTED: \$1,200.00

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

The screenshot shows the Concur Expense Center interface. On the left, there is a table of expenses with columns for Date, Expense, Amount, and Requested. The table includes entries for Airfare, Hotel/Motel/B&B, Car Rental, and Taxi. A comment icon (a speech bubble) is visible next to the Taxi entry. A pop-up window titled "Comment History" is open, showing a table with columns for Date, Entered By, and Comment Text. The comment text reads "6 taxis in Denver." The right side of the interface shows the "New Expense" form with various fields and a "Submit Report" button.

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

The screenshot shows the Concur Expense Center interface with the "New Expense" form open. The form includes fields for Expense Type, Transaction Date, Payment Type, Vendor Name, Amount, and Number of Meals. The "Alcohol" dropdown menu is highlighted with a red circle, and the value "Y" is selected. A callout box points to the "Alcohol" dropdown with the text "Then, click Itemize." The bottom of the form has buttons for "Save", "Itemize", "Allocate", "Attach Receipt", and "Cancel". The "Itemize" button is also highlighted with a red circle. The left side of the interface shows the same table of expenses as in the first screenshot.

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

CONCUR Expense Approvals Reporting App Center Administration Help

Manage Expenses Process Reports

Denver Conference- APS

+ New Expense + Quick Expenses Details Recepts 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

Date	Expense	Amount	Requested
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)		

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

Meals 40.00
 Breakfast/Lunch (Dinner)
 Alcohol 10.00

Save Itemizations Cancel

The Itemization Wizard will appear.

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

Then, click Save Itemizations.

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

CONCUR Expense Approvals Reporting App Center Administration Help

Manage Expenses Process Reports

Denver Conference- APS

Quick Expenses Details Recepts Print

Expense Amount Requested

08/28/2014	Fare 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
08/28/2014	Alcohol	\$10.00	\$10.00
08/28/2014	Meals (Breakfast/Lunch/Dinner)	\$40.00	\$40.00

Total Amount \$1,370.00 TOTAL REQUESTED \$1,370.00

Itemization

Expense Type: Alcohol
 Transaction Date: 08/28/2014
 Business Purpose:
 City:
 Amount: 10.00 USD
 Comment:

Save Allocate Cancel

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

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.

This will open up the Allocation Window.

Allocations for Report: Denver Conference- APS

Expense List

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%)

Percentage	Cost Object	Code
100	VFP-M&S	1633500

Type to search by:

Text Code
(Code) Text

(1633540) TRAVEL/HQ

Save Cancel

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

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

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

Expense Center

Manage Expenses Process Reports

Expense- APS

Amount	Requested
\$560.00	\$560.00
\$450.00	\$450.00
\$190.00	\$190.00
\$120.00	\$120.00
\$50.00	\$50.00

Itemization

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

Expense Type: Alcohol

Transaction Date: 08/28/2014

Business Purpose:

City:

Amount: 10.00 USD

Payment Type: Out of Pocket

Personal Expense (do not reimburse):

Comment:

Save Allocate Cancel

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

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.

The screenshot displays the Concur Expense Center interface for a user named 'Denver Conference- APS'. The main navigation bar includes 'Expense', 'Approvals', 'Reporting', and 'App Center'. The user's profile is visible in the top right corner. The interface is divided into 'Manage Expenses' and 'Process Reports' sections. A callout box points to the 'Receipts' dropdown menu, which is open, showing options: 'Receipts Required', 'Check Receipts', 'Attach Receipt Images' (highlighted with a red circle), 'View Receipt Store', and 'Missing Receipt Affidavit'. The 'Attach Receipt Images' option is the focus of the instruction. The main content area shows a list of expenses for the date 08/28/2014, including Airfare, Hotel/Motel/B&B, Car Rental Budget, Taxi, and Meals (Breakfast/Lunch/Dinner). The 'Meals' line item is selected. To the right, the 'Expense' details form is visible, showing fields for Expense Type (Meals), Transaction Date (08/28/2014), Payment Type (Out of Pocket), Amount (50.00), and Vendor Name. The total amount for the selected item is \$50.00, and the remaining amount is \$0.00. The bottom of the interface shows the total amount and total requested amount, both at \$1,370.00.

Click 'Receipts'-
'Attach Receipt
Images'.

Date	Expense	Amount	Requested
08/28/2014	Airfare American Airlines		
08/28/2014	Hotel/Motel/B&B		
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	Meals (Breakfast/Lunch/Dinner)	\$40.00	\$40.00
08/28/2014	Alcohol	\$10.00	\$10.00

TOTAL AMOUNT: \$1,370.00
TOTAL REQUESTED: \$1,370.00

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**.

The screenshot shows the Concur Expense Center interface. A modal window titled "Receipt Upload and Attach" is open. The window contains the following text:

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.

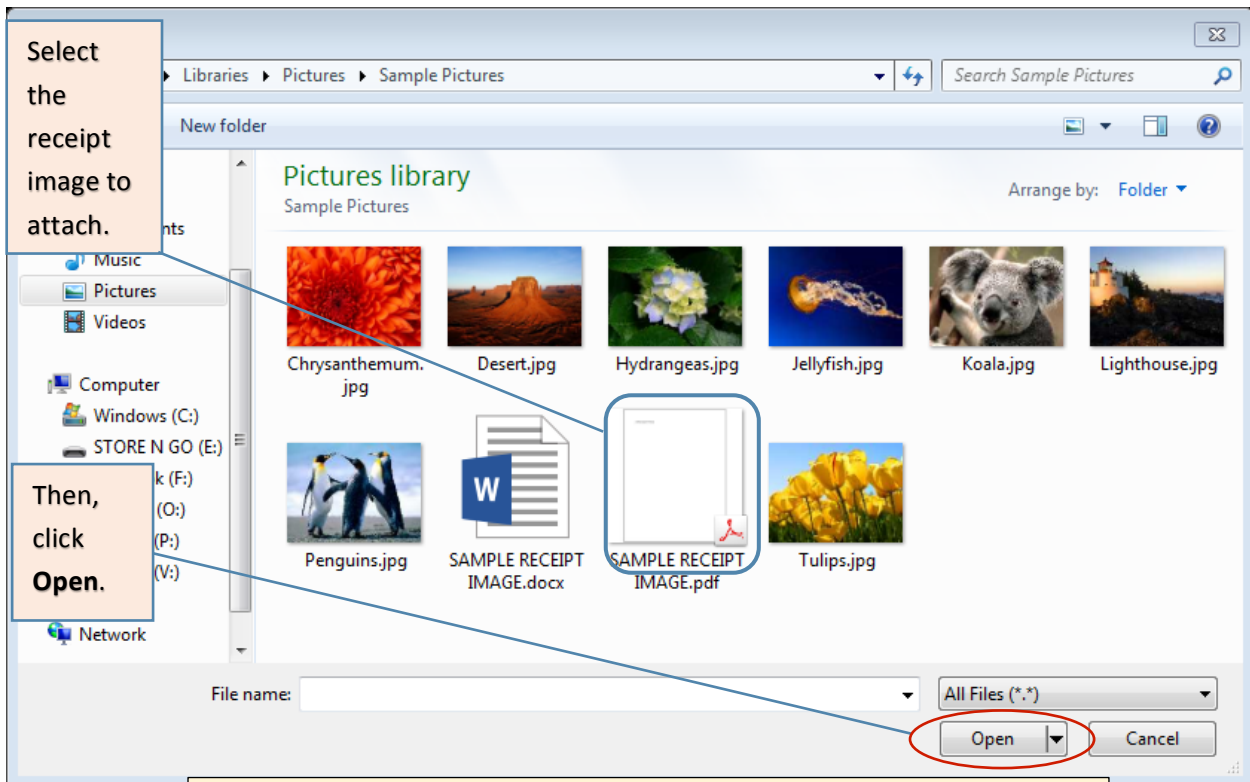
Files Selected for uploading:

No files selected

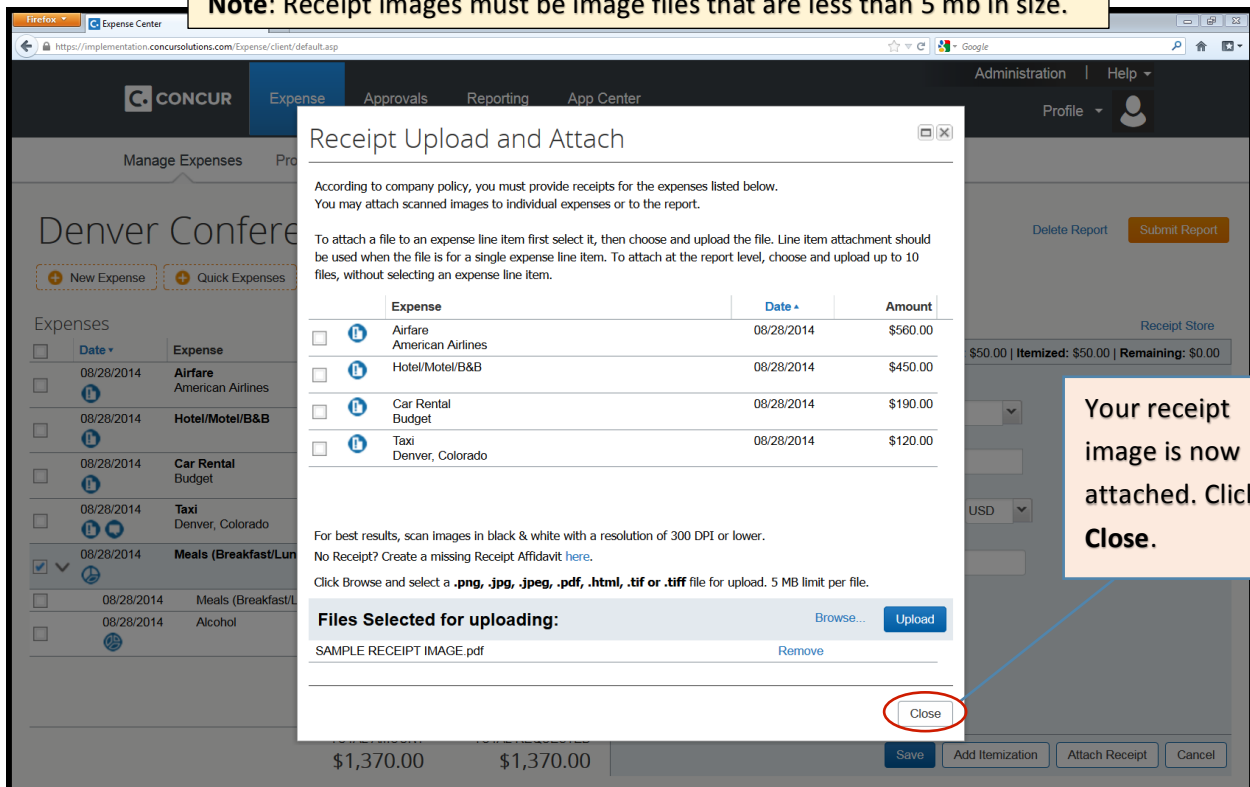
Close

At the bottom of the window, there are buttons for "Save", "Add Itemization", "Attach Receipt", and "Cancel".

A callout box with the text "Click Browse." points to the "Browse" button in the "Files Selected for uploading:" section.



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



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.

The screenshot shows an expense report interface for "Denver Conference- APS". A yellow callout box highlights the "Details" button in the top navigation bar, which has a dropdown menu open. The dropdown menu includes options: Report Header, Totals, Audit Trail, Approval Flow, Comments, Allocations, and Allocations. The main interface displays a table of expenses and a detailed view of the selected "Meals (Breakfast/Lunch/Dinner)" expense.

Expenses	Date	Expense	Amount	Requested
<input type="checkbox"/>	08/28/2014	Airfare American Airlines	0.00	\$560.00
<input type="checkbox"/>	08/28/2014	Hotel/Motel/B&B	0.00	\$450.00
<input type="checkbox"/>	08/28/2014	Car Rental Budget	0.00	\$190.00
<input type="checkbox"/>	08/28/2014	Taxi Denver, Colorado	0.00	\$120.00
<input checked="" type="checkbox"/>	08/28/2014	Meals (Breakfast/Lunch/Dinner)	\$50.00	\$50.00
<input type="checkbox"/>	08/28/2014	Meals (Breakfast/Lunch/Dinner)	\$40.00	\$40.00
<input type="checkbox"/>	08/28/2014	Alcohol	\$10.00	\$10.00

TOTAL AMOUNT: \$1,370.00 TOTAL REQUESTED: \$1,370.00

Expense details for "Meals (Breakfast/Lunch/Dinner)":
Expense Type: Meals (Breakfast/Lunch/Dinner)
Transaction Date: 08/28/2014
Payment Type: Out of Pocket
Amount: 50.00 USD
Vendor Name: [Empty]
Number of Meals: [Empty]
Alcohol: Y
City: [Empty]
Comment: [Empty]

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

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		

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**.

The screenshot shows a web application interface for managing expenses. The main heading is "Denver Conference- APS". Below the heading, there are navigation tabs for "Manage Expenses" and "Process Reports". A "Submit Report" button is highlighted in a red circle in the top right corner. The interface includes a table of expenses, a "New Expense" form, and a list of "Recently Used Expense Types".

Expenses	Date	Expense	Amount	Requested
Adding New Expense				
<input type="checkbox"/>	08/28/2014	Airfare American Airlines	\$560.00	\$560.00
<input type="checkbox"/>	08/28/2014	Hotel/Motel/B&B	\$450.00	\$450.00
<input type="checkbox"/>	08/28/2014	Car Rental Budget	\$190.00	\$190.00
<input type="checkbox"/>	08/28/2014	Taxi Denver, Colorado	\$120.00	\$120.00
<input type="checkbox"/>	08/28/2014	Meals (Breakfast/Lunch/Dinner)	\$50.00	\$50.00
			TOTAL AMOUNT	TOTAL REQUESTED
			\$1,370.00	\$1,370.00

Recently Used Expense Types

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

All Expense Types

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

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

CONCUR Expense Approvals Reporting App Center Administration Help Profile

Report Submit Status - Denver Conference- APS

This report was submitted successfully.
 Sent to: Cost Object Approval

Expense Report

Report Total :	\$1,370.00
Less Personal Amount :	\$0.00
Amount Due Employee :	\$1,370.00
Total Paid By Company :	\$1,370.00

Employee Disbursements

Amount Owed Company :	\$0.00
-----------------------	--------

Tell us how we are doing (optional)

Overall satisfaction with Concur: ★★★★★

Ease of completing tasks today: ★★★★★

Comments and suggestions: (Max. 1000 characters)

Sign me up to participate in future research studies.

Send Feedback

Close

Click Close.

Manage Expenses

Denver Conference- APS

New Expense Quick Expense

Expenses

Date	Expense
08/28/2014	Airfare American
08/28/2014	Hotel/Travel
08/28/2014	Car Rental Budget
08/28/2014	Taxi Denver, Colorado
08/28/2014	Meals (Breakfast)
08/28/2014	Meals (Breakfast)
08/28/2014	Alcohol

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

Save Add Itemization Attach Receipt Cancel

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

CONCUR Expense Approvals Reporting App Center Administration Help Profile

Process Reports

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

\$757.96 Warnings	\$7,249.10	\$950.00
NOT SUBMITTED test \$265.36	NOT SUBMITTED test15 \$142.96 Warnings	NOT SUBMITTED test \$260.92 Warnings
NOT SUBMITTED test \$602.80 Warnings	SUBMITTED 09/10/2014 Denver Conference-APS \$1,370.00 Pending Cost Object Approval	

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

Administration | Help

Approvals Reporting App Center Profile

Manage Expenses Process Reports

Denver Conference- APS

Summary Details Receipts Print

Expenses

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

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**.

The screenshot displays the Concur Expense Center interface. The main view shows an expense report for 'Denver Conference- APS' with a table of expenses. A modal window is open for administering a guest profile for Kathleen McGrath. The modal contains the following information:

- Kathleen McGrath**
- GUEST, TRAINING_**
- TRAINING_GUEST@mit.edu (User Name)
- kmcgrath@mit.edu (Email)
- TRAINING_GUEST@mit.edu (Employee ID)
- Administer for another user... (input field with 'kmcgr' and a settings icon)
- Apply** button (circled in red)

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

Report Totals	Amount Due Company	Amount Due Employee
	\$0.00	\$1,370.00

TOTAL AMOUNT: \$1,370.00
TOTAL REQUESTED: \$1,370.00

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.

The screenshot shows a web browser window displaying an expense report creation form. The browser's address bar shows 'default.asp'. The page title is 'Expense R...'. The user is logged in as 'Administer for GUEST, TRAINING_'. The form contains the following fields:

- Policy: MIT Guest User Expense Pr
- Report Date: 09/10/2014
- Report Name: [Text Field]
- Report Key: [Text Field]
- Guest Traveler Type: [Dropdown]
- Trip Purpose: [Dropdown]
- Cost Object: [Dropdown]
- Trip Start Date: [Text Field]
- Trip End Date: [Text Field]
- Destination: [Text Field]
- Trip Classification: [Dropdown]
- Guest Name: [Text Field]
- Guest Address: [Text Field]
- Guest Address 2: [Text Field]
- Guest City: [Text Field]
- Guest Country: [Dropdown]
- Guest State: [Dropdown]
- Postal (ZIP) Code: [Text Field]
- Comment: [Text Area]

Two callout boxes are present. The left box explains that fields from Guest Name onwards will appear on a paper check. The right box emphasizes that Guest Name should be the payee's legal name and the address fields should be the mailing address. Red boxes highlight the Guest Name, Guest Address, Guest Address 2, Guest City, Guest Country, Guest State, and Postal (ZIP) Code fields. Blue arrows point from the callout boxes to the Guest Name and Guest Address fields. At the bottom right, there are 'Next >>' and 'Cancel' buttons.