

VPF Travel Expense Overview

Posted: January 16, 2014



Policy Overview

Receipts

- ✧ Travelers must keep (and attach to their Concur Expense Report) itemized receipts for all expenses in excess of \$75.
 - ✧ The exceptions to this rule are **Business Meetings** and **Meals with alcohol**. Itemized receipts are required for these two types of Expenses regardless of price.
 - ✧ A **Meal** becomes a **Business Meeting** when any non MIT party is in attendance.
- ✧ Original receipts associated with your trip and Concur Expense Report must be kept on file for the current Fiscal Year plus one additional year.



MIT Travel Card

General Information:

- ✧ The MIT Travel Card is provided as a payment tool for the MIT community to use when making travel arrangements and while traveling on official MIT business.
- ✧ Personal items may not be purchased on the MIT Travel Card.
- ✧ The MIT Travel Card is for business travel expenses. It does not replace other MIT purchasing tools, such as the MIT Procurement Card (ProCard).
- ✧ Use of the MIT Travel Card **does not** eliminate the need for receipts. Please retain receipts for MIT Travel Card purchases in accordance with Travel's receipt retention policy.



MIT Travel Card

How it Works:

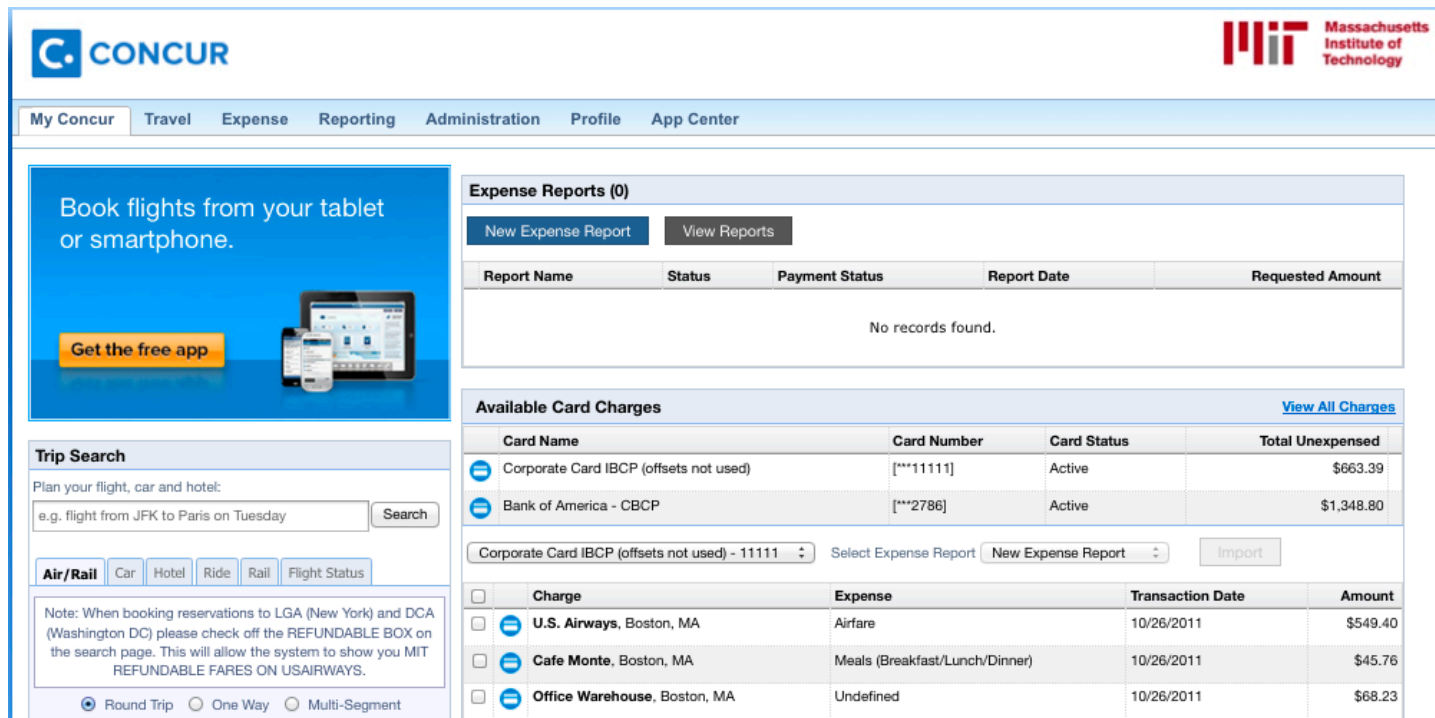
- ❖ Operates like a standard Visa card where the vendor is paid at point of purchase.
- ❖ Card transactions are fed into Concur via a nightly feed. The transactions for purchases made on your Individual MIT Travel Card will feed directly into your profile under the **Available Card Charges** section [My Concur tab].
- ❖ MIT Travel pays the statement balance of all Travel Cards at the Institute at the beginning of each month. The transactions then sit in a suspense account managed by Travel staff until a Concur Expense Report is done.
- ❖ A Concur Expense Report, done at the conclusion of a trip, functions to transfer the related card charges out of the Travel Office's suspense account and post them to your Department's cost objects.



Submitting an Expense Report

Guidelines to Remember:

- ✧ Travelers are required to submit an expense within 30 days after the trip end date.
- ✧ Creating an Expense Report as your Travel Card charges start to feed into Concur and submitting the report in a timely manner will help you avoid receiving a dunning notice and facilitate the timely reimbursement of out of pocket expenses.



CONCUR MIT Massachusetts Institute of Technology

My Concur | Travel | Expense | Reporting | Administration | Profile | App Center

Book flights from your tablet or smartphone.

[Get the free app](#)

Expense Reports (0)

[New Expense Report](#) [View Reports](#)

Report Name	Status	Payment Status	Report Date	Requested Amount
No records found.				

Trip Search

Plan your flight, car and hotel:

e.g. flight from JFK to Paris on Tuesday

Note: When booking reservations to LGA (New York) and DCA (Washington DC) please check off the REFUNDABLE BOX on the search page. This will allow the system to show you MIT REFUNDABLE FARES ON USAIRWAYS.

Round Trip One Way Multi-Segment

Available Card Charges [View All Charges](#)

Card Name	Card Number	Card Status	Total Unexpensed
Corporate Card IBCP (offsets not used)	[***11111]	Active	\$663.39
Bank of America - CBCP	[***2786]	Active	\$1,348.80

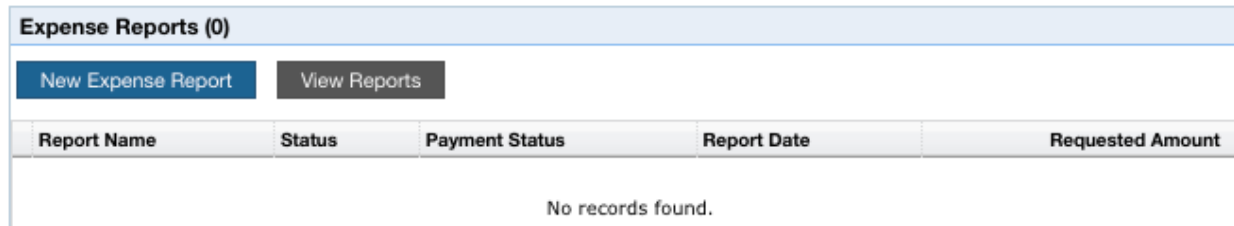
Corporate Card IBCP (offsets not used) - 11111 | Select Expense Report: [New Expense Report](#) |

Charge	Expense	Transaction Date	Amount
<input type="checkbox"/> U.S. Airways, Boston, MA	Airfare	10/26/2011	\$549.40
<input type="checkbox"/> Cafe Monte, Boston, MA	Meals (Breakfast/Lunch/Dinner)	10/26/2011	\$45.76
<input type="checkbox"/> Office Warehouse, Boston, MA	Undefined	10/26/2011	\$68.23

Submitting an Expense Report

How to Create an Expense Report:

1. Access Concur: <https://web.mit.edu/concur>
2. In the Expense Reports section of the My Concur page, click **New Expense Report**

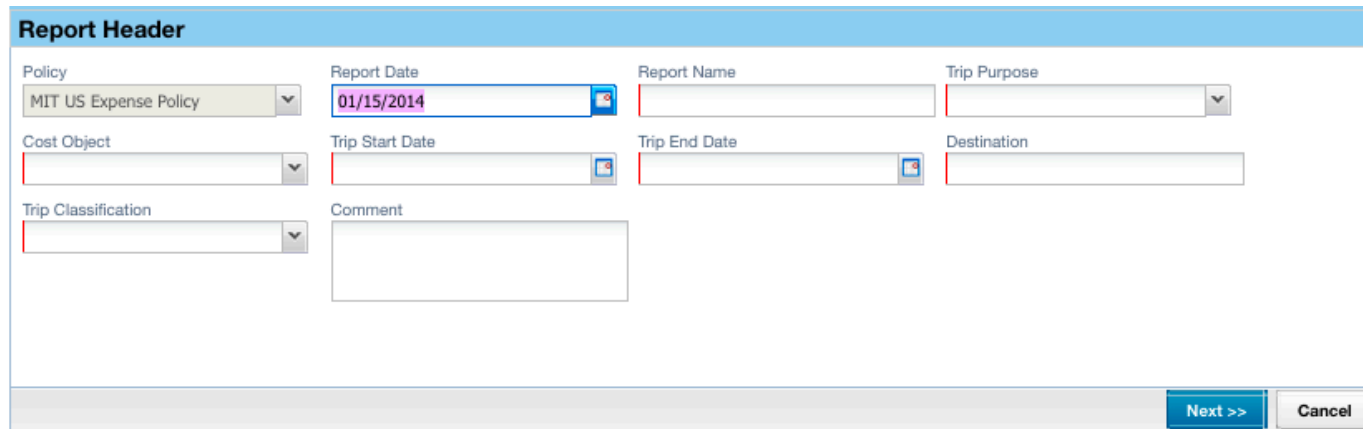


Expense Reports (0)

New Expense Report View Reports

Report Name	Status	Payment Status	Report Date	Requested Amount
No records found.				

3. Complete all required fields in the **Report Header** (those with the red bar at the left edge of the field)



Report Header

Policy: MIT US Expense Policy

Report Date: 01/15/2014

Report Name: [Red bar]

Trip Purpose: [Red bar]

Cost Object: [Red bar]

Trip Start Date: [Red bar]

Trip End Date: [Red bar]

Destination: [Red bar]

Trip Classification: [Red bar]

Comment: [Red bar]

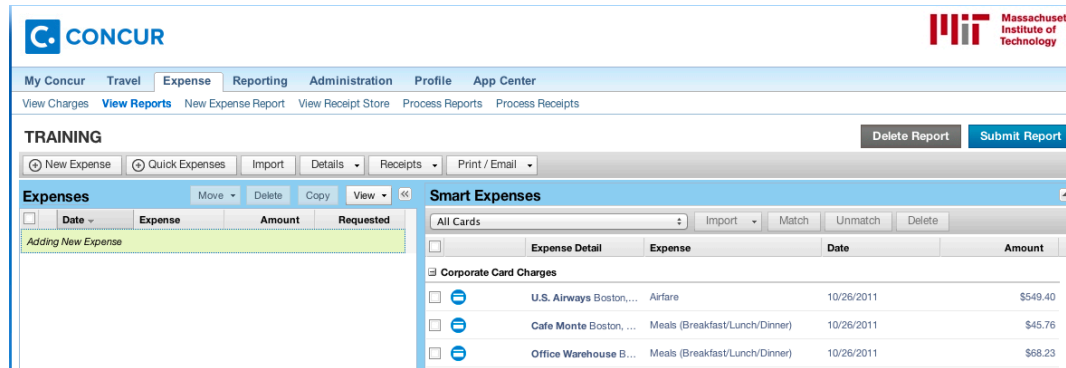
Next >> Cancel

4. Click **Next**

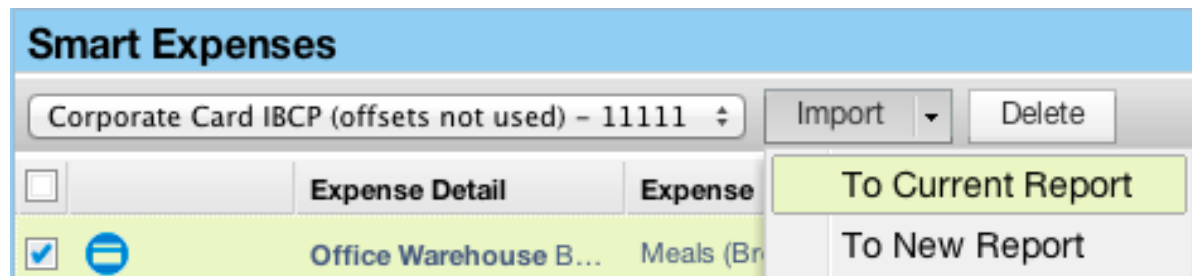
Submitting an Expense Report

How to Import Card Charges:

1. On the Expense Report page, click on the **Import** button



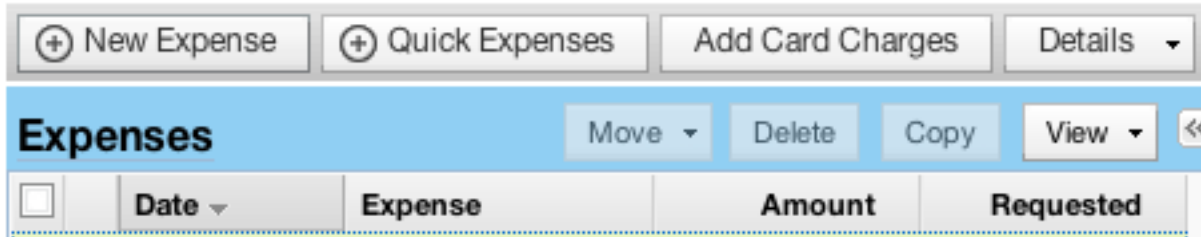
2. In the Corporate Card Charges section, select each transaction that you want to assign to the current expense report
3. In the **Smart Expenses** section, from the **Import** dropdown menu, select **To Current Report**



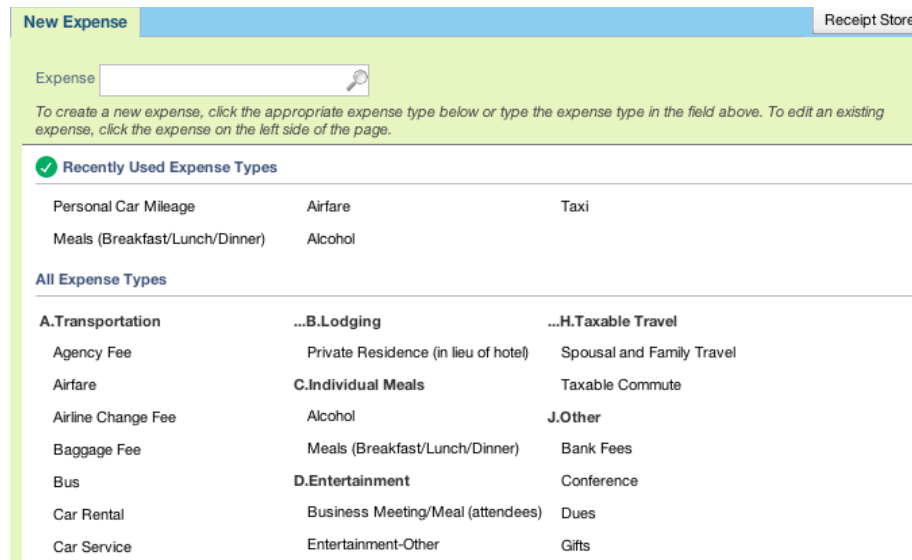
Submitting an Expense Report

How to Add an Out of Pocket Expense:

1. Click the **New Expense** button



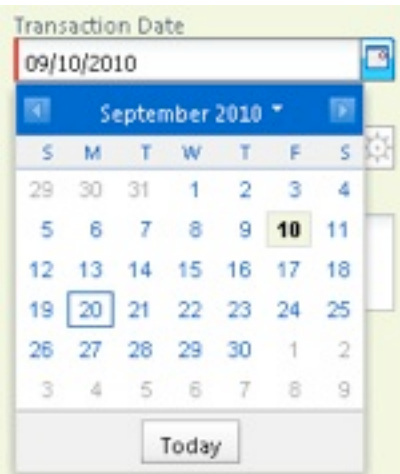
2. On the **New Expense** tab, select the appropriate expense type



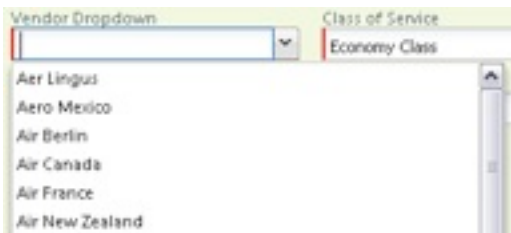
Submitting an Expense Report

How to Add an Out of Pocket Expense (cont):

3. For date fields, use the calendar to select the date of the expense



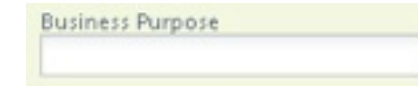
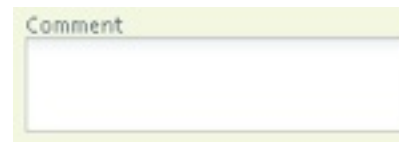
4. For lists, select from the list



5. For auto-complete fields, type the first portion of your choice and then select from the list



6. Complete other text fields and checkboxes as usual

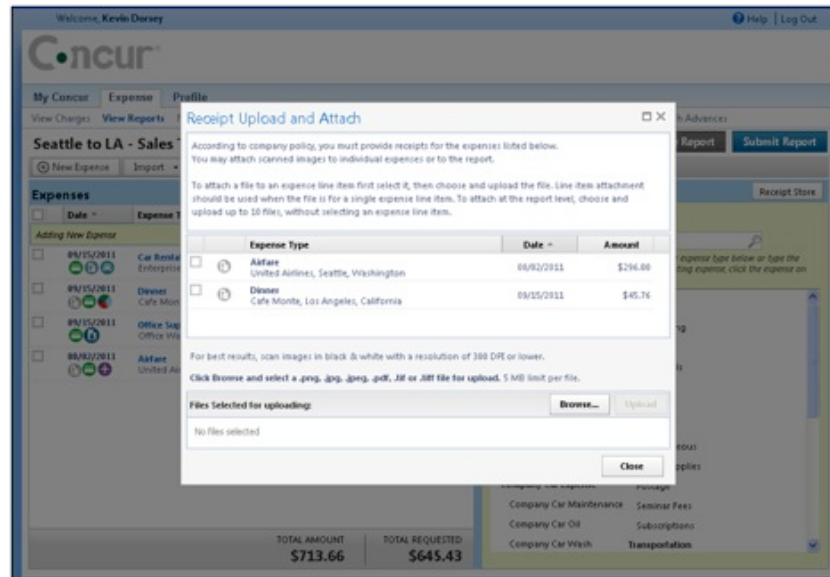


7. Required fields will have a red bar at the left edge of the field. Once these are completed click **Save**

Submitting an Expense Report

How to Attach Receipt Images:

1. On the Expense Report page, from the **Receipts** dropdown menu, select **Attach Receipt Images**

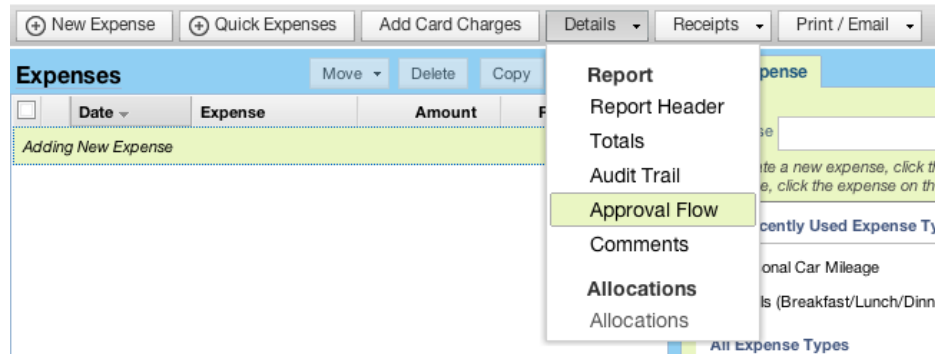


2. On the **New Expense** tab, select the appropriate expense type
3. Click **Browse**, and then locate the file you want to attach
4. Click the file, and then click **Open** (to attach another image repeat above process)
5. Click **Upload**, and then click **Done**
6. To view the receipts, from the **Receipts** dropdown menu, select **Check Receipts**

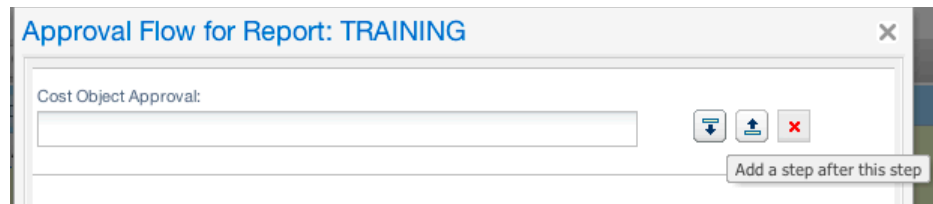
Submitting an Expense Report

How to Add an Additional Approver:

1. Click on the **Details** dropdown and select **Approval Flow**



2. Click on first button with a downward facing arrow [**Add a step after this step**]



3. The added form field will be labeled **User-Added Approver**, type in the added approver's Kerberos name, email, or last name to search

Submitting an Expense Report

How to Add an Additional Approver (continued):

Approval Flow for Report: TRAINING

Cost Object Approval:

User-Added Approver:

McGrath, Kathleen (KMCGRATH@MIT.EDU)

Search Approvers By

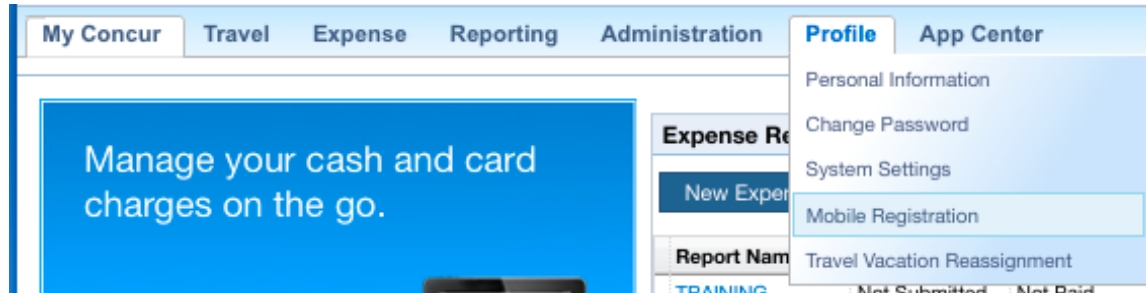
Submit Report Save Workflow Cancel

4. Once you have located your additional approver click **Save Workflow**
 - ✧ Once you submit your report it will now go to the User-Added Approver before the default cost object approvers
 - ✧ Both Approvers must review and approve the report before it can be moved to Travel for final audit and payment processing

Concur's Mobile App

How to Register:

1. Click on the **Profile** tab of the MIT Concur homepage and select Mobile Registration



2. Select the **create a mobile PIN** link to set up login credential for you mobile phone

Set up PIN for mobile

To log in to Concur on your mobile device or Concur Connect application, you must enter your User Name and a PIN.
Enter a new PIN in the fields below to setup a new one.

Create PIN: PIN may be letters, numbers and special characters such as !,\$, or # but no spaces

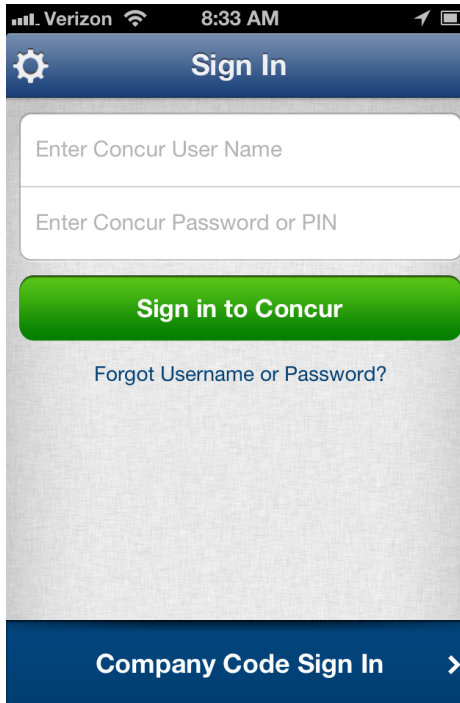
Retype PIN:

3. Download the Concur Mobile App via the App Store on your phone or utilizing the Concur **Mobile Registration** page to send a link to your device via email address or mobile phone number

Concur's Mobile App

How to Register (continued):

4. When you first open the application on your mobile device you will see the following screen:



5. Your **Concur User Name** is your MIT email address (kerberos name plus @mit.edu)
6. Enter the PIN you created on the Concur **Mobile Registration** page within your profile and click **Sign in to Concur** button

Concur's Mobile App

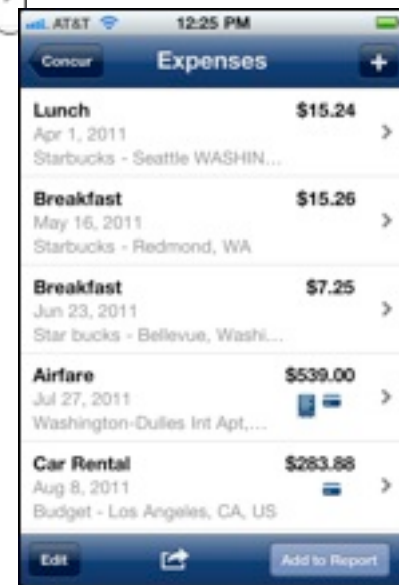
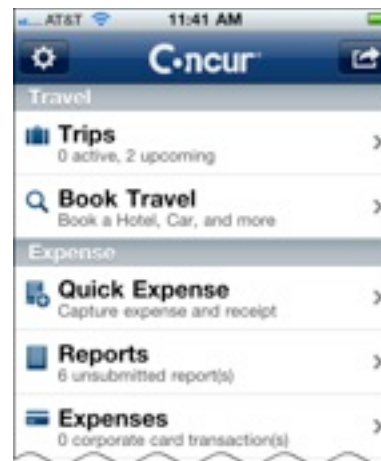
Using the App:

✧ List of Expenses (the Expenses Screen)

Select **Expenses** on the home screen to access the Expenses screen.

On the Expenses screen, you can:

- ✧ Add, view, edit, and delete Quick Expenses
- ✧ View and make minimal edits to card charges, which appear with a card icon.
- ✧ Attach expenses - both Quick Expenses and card charges - to an expense report.



Concur's Mobile App

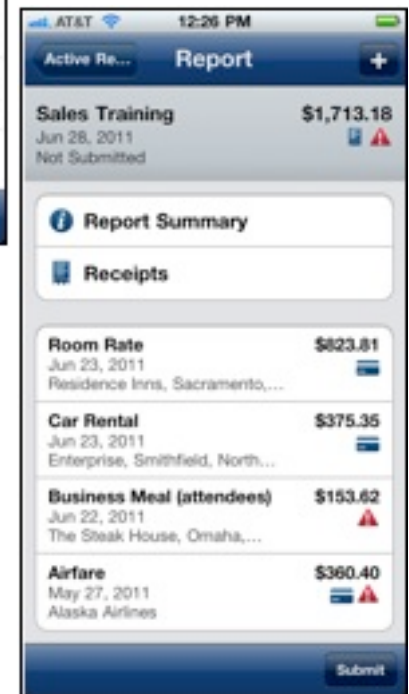
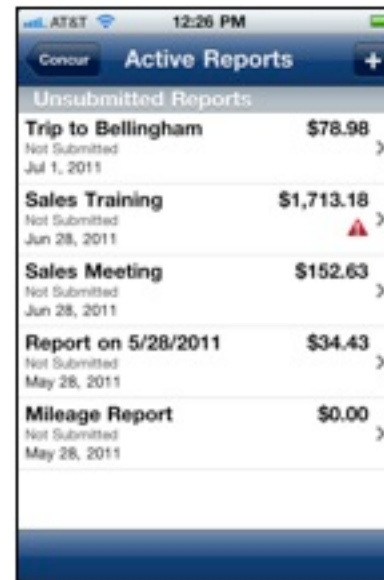
✧ List of Reports (the Active Reports Screen)

Select **Reports** on the home screen to access the Active Reports screen.

On the **Active Reports** screen, reports are grouped by: Unsubmitted Reports, Submitted Reports, and Other Reports.

On the **Active Reports** screen, you can:

- ✧ Review the report status
- ✧ Delete a report
- ✧ Create a new report
- ✧ Access current reports to view, edit, delete or submit



Concur's Mobile App

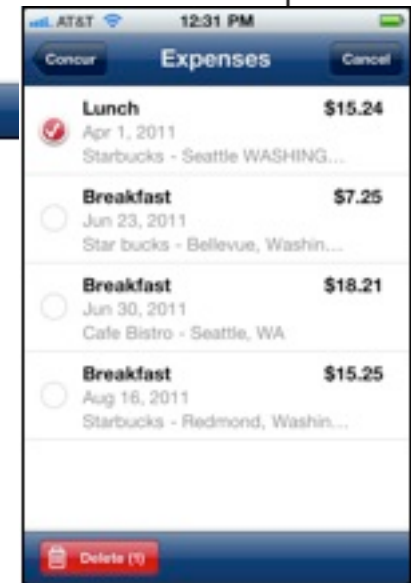
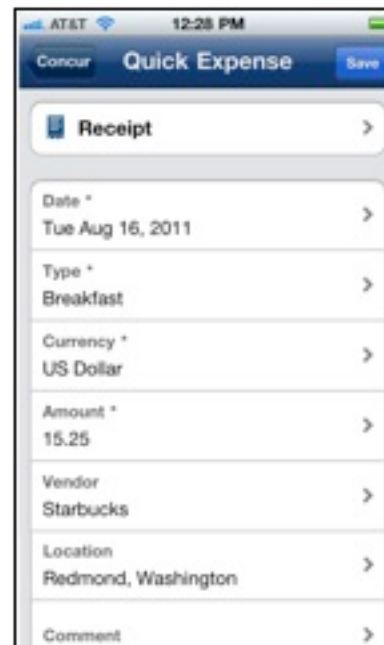
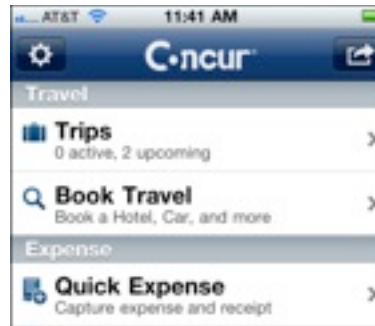
✧ Create a Quick Expense

Use the + on the top of the **Expenses** screen or Use **Quick Expense** on the home screen (steps outlined below)

1. Select Quick Expense.
2. Enter the required information and attach the receipt image
3. Select Save.

✧ Delete an Expense from the Expenses Screen

1. Select Edit.
2. The expenses can now be selected using the to the left of each expense.
3. Select the desired expenses.
4. Select Delete.

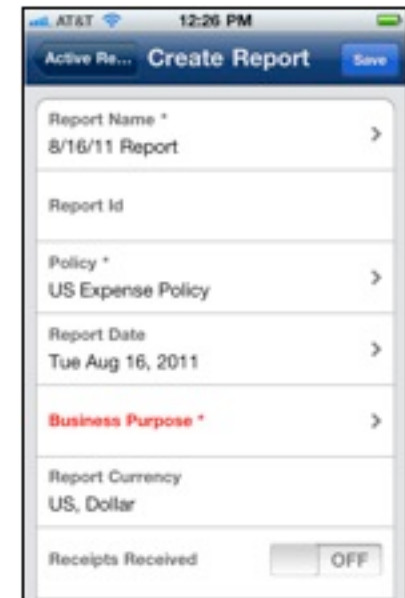
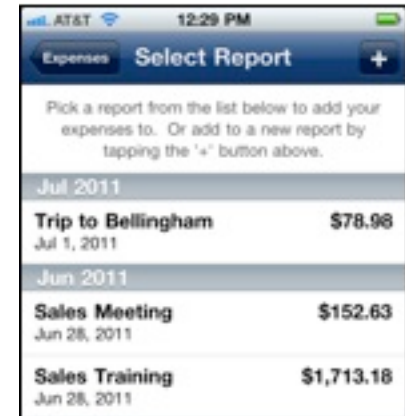


Concur's Mobile App

✧ Attach Expenses (from the Expenses Screen) to a Report

You can attach expenses to an unsubmitted expense report or to a new expense report.

1. Select **Add to Report**
2. The expenses can now be selected using the radial button to the left of each expense. Select the desired expenses
3. Select **Add to Report**
4. To create a new report, select + at the top of the screen - or -
5. Select from existing reports

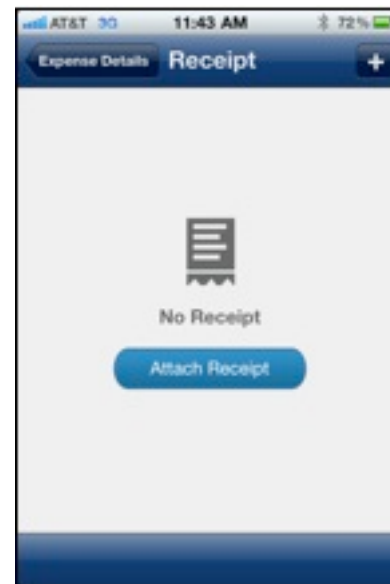
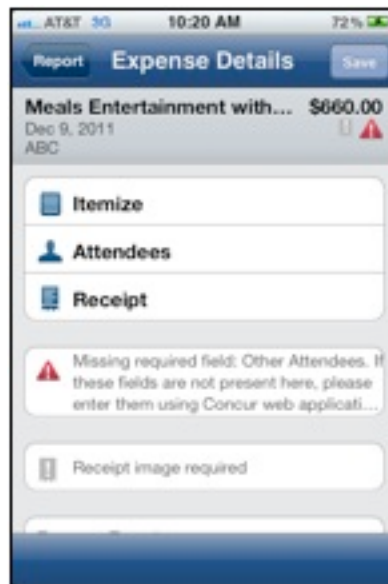


Concur's Mobile App

✧ Work with Receipts

To attach receipts to expenses that require them:

1. Open the expense, and then select **Receipt**.
2. Select **Attach Receipt**.
3. Take a picture using the phone's camera, or select from the phone's Photo Album



Concur Help/Resources

Link for Concur Travel & Expense:

✧ <https://web.mit.edu/concur>

Training Documents:

✧ <http://vpf.mit.edu/site/travel/resources>

Drop In Sessions (for assistance with current expense reports):

✧ Every Wednesday from 10:00 – 11:00am in NE49 (3rd Fl, Little Cayman Lab)



Travel Contact Information



Travel

Office of the Vice President for Finance

600 Technology Square

NE49 – 4037

fax : 617-258-5949

Email: travel@mit.edu

For Staff Information and Telephone Numbers Please See Our Web

Page : <http://vpf.mit.edu/travel>

