Quick Guide to Concur 2.0 – 2015 Upgrade

MIT's newly upgraded travel system, Concur 2.0, features an improved user interface and capabilities requested by MIT travelers and administrators.

This Quick Guide includes easy-to-follow tutorials to help guide you through many of the new enhancements. Please use this guide as a supplement to the in-person training sessions being offered by VPF Travel staff.

Click on the menu item below to view the tutorial.

Expense Delegate Setup Instructions

Acting as a Delegate

Using the Itemization Wizard

Itemizing Business Class Airfare

Using the Mileage Calculator Tool

Attaching a Missing Receipt Affidavit to an Expense

How to Mark an Itemization as Personal

How to Manually Add an Additional Approver to Workflow

How to Create a Report Using a Guest Profile

For assistance:

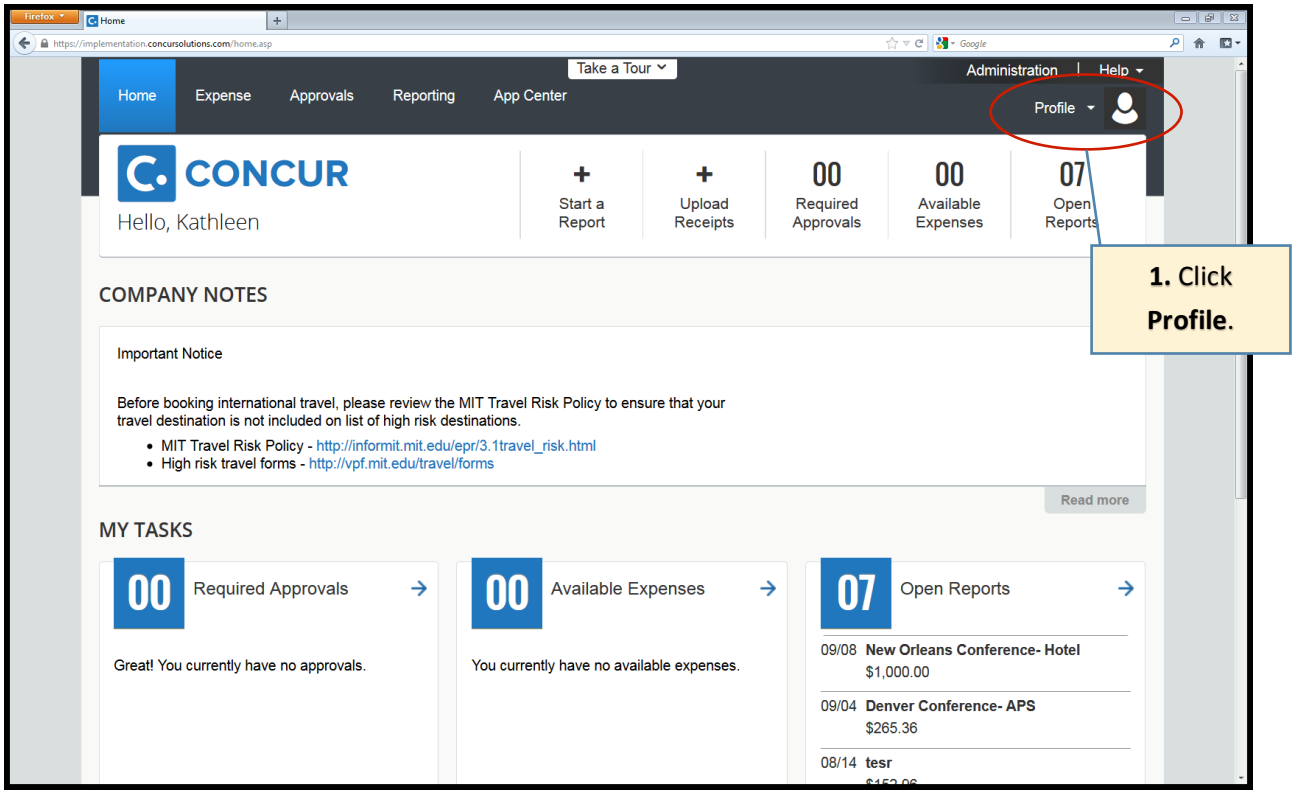
Travel Services, Office of the Vice President for Finance

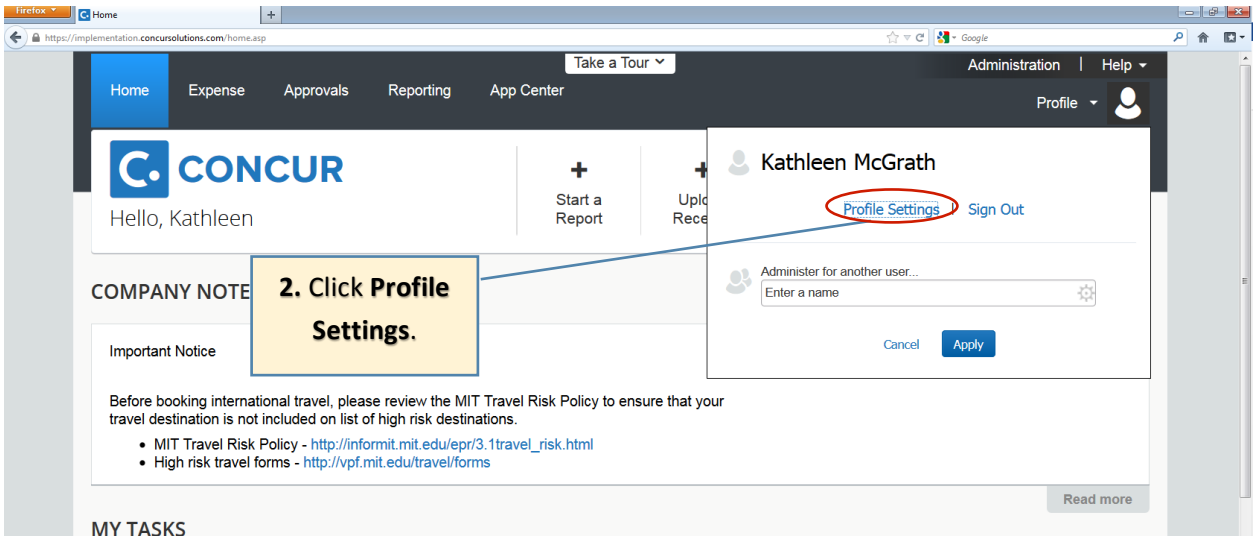
travelsupport@mit.edu

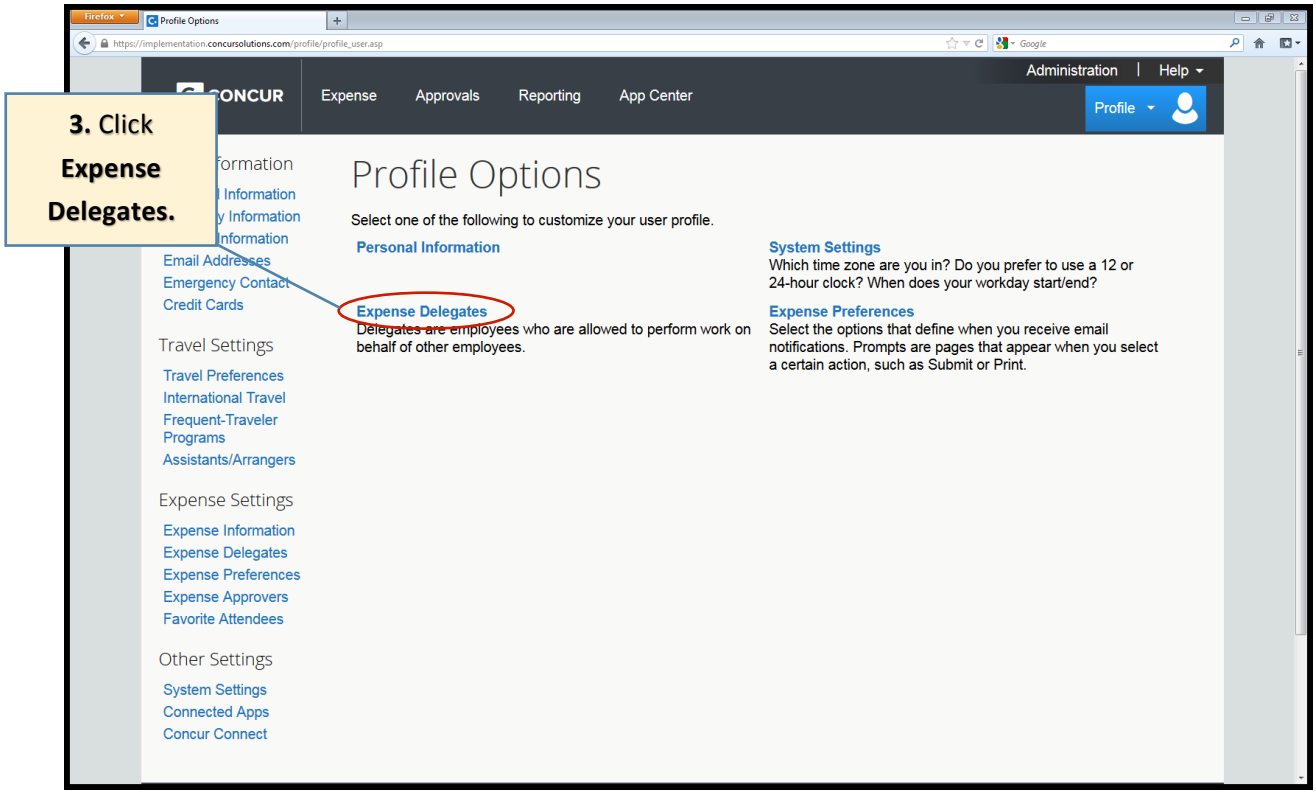
617-253-8366

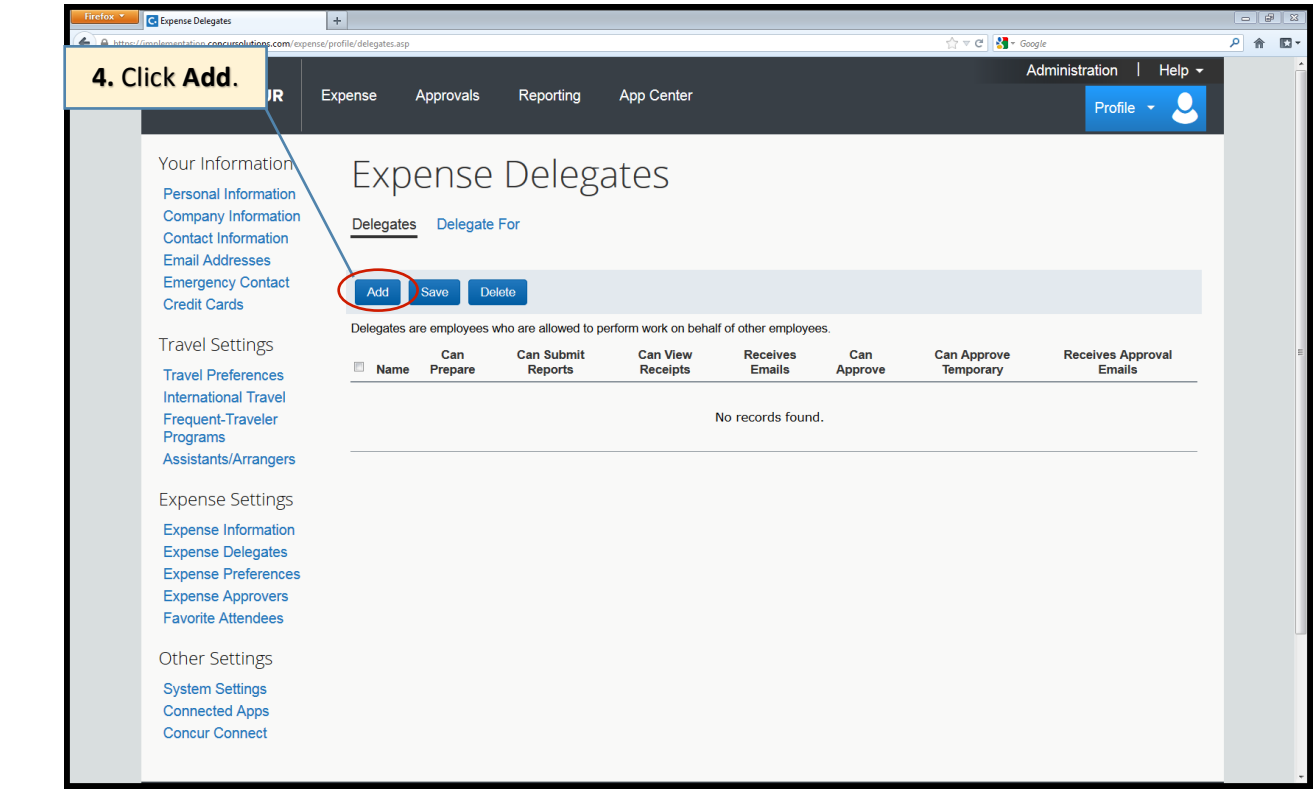
Expense Delegate Setup Instructions

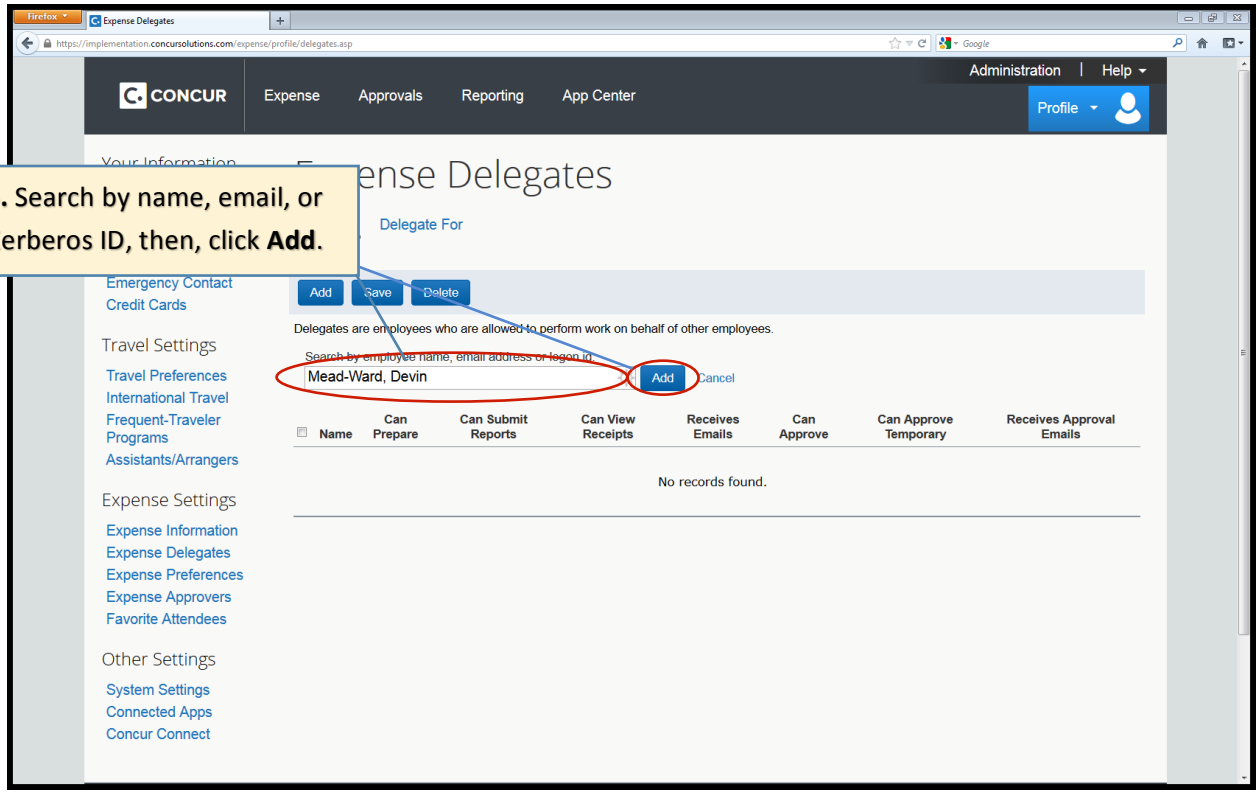
To give someone access to your profile to submit and view expense reports on your behalf, you will need to add them as an expense delegate. To do so, follow these steps from the Concur home page:

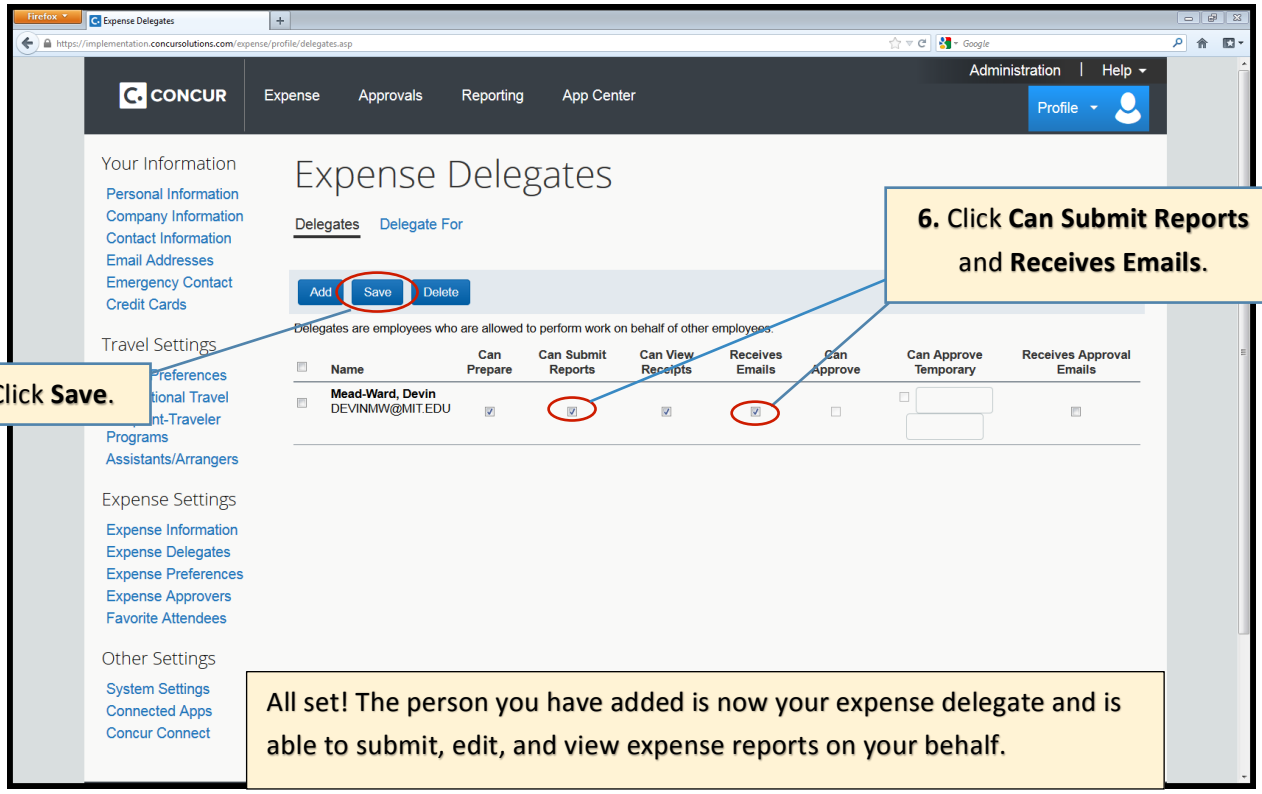





3. Click Expense Delegates.
Profile Options
Administration | Help
CONCUR
Expense
Approvals
Reporting
App Center
Profile
Profile Options
Select one of the following to customize your user profile.
Personal Information
System Settings
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?
Expense Delegates
Delegates are employees who are allowed to perform work on behalf of other employees.
Expense Preferences
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.
Email Addresses
Emergency Contact
Credit Cards
Travel Settings
Travel Preferences
International Travel
Frequent-Traveler Programs
Assistants/Arrangers
Expense Settings
Expense Information
Expense Delegates
Expense Preferences
Expense Approvers
Favorite Attendees
Other Settings
System Settings
Connected Apps
Concur Connect

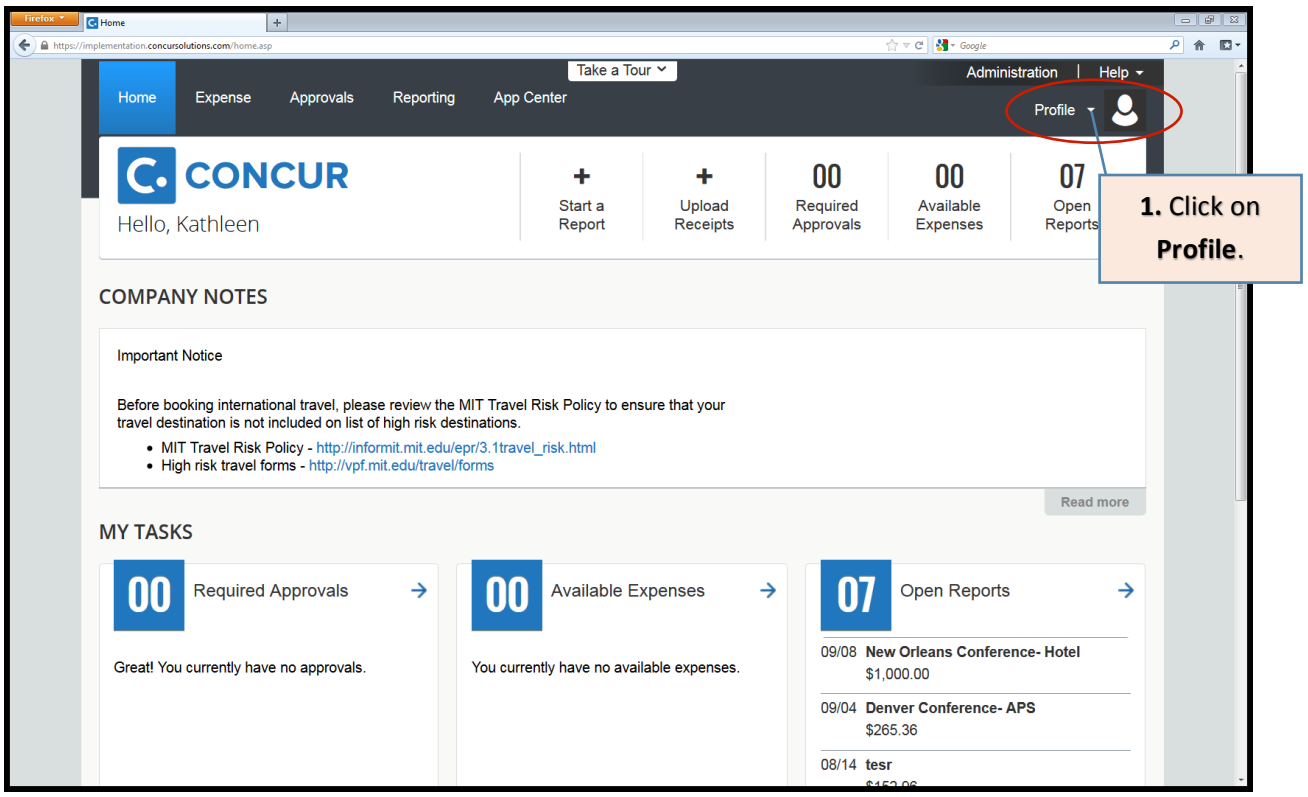

4. Click Add.
Expense Delegates
Administration | Help
Expense
Approvals
Reporting
App Center
Profile
Expense Delegates
Delegates
Delegate For
Add
Save
Delete
Delegates are employees who are allowed to perform work on behalf of other employees.
Name
Can Prepare
Can Submit Reports
Can View Receipts
Receives Emails
Can Approve
Can Approve Temporary
Receives Approval Emails
No records found.
Your Information
Personal Information
Company Information
Contact Information
Email Addresses
Emergency Contact
Credit Cards
Travel Settings
Travel Preferences
International Travel
Frequent-Traveler Programs
Assistants/Arrangers
Expense Settings
Expense Information
Expense Delegates
Expense Preferences
Expense Approvers
Favorite Attendees
Other Settings
System Settings
Connected Apps
Concur Connect

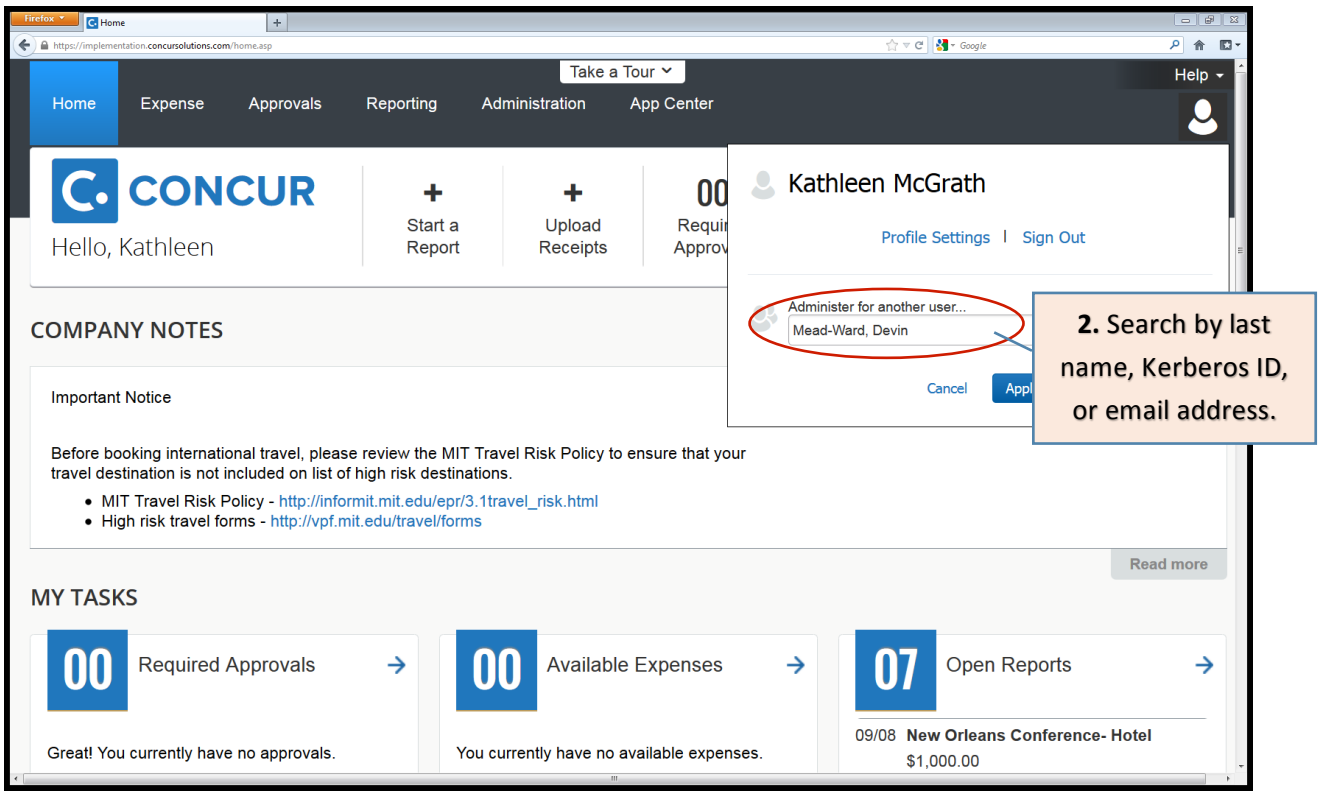

5. Search by name, email, or Kerberos ID, then, click Add.
CONCUR
Expense
Approvals
Reporting
App Center
Administration
Help
Profile
Expense Delegates
Delegate For
Add
Save
Delete
Delegates are employees who are allowed to perform work on behalf of other employees.
Search by employee name, email address or logon id
Mead-Ward, Devin
Add
Cancel
Name
Can Prepare
Can Submit Reports
Can View Receipts
Receives Emails
Can Approve
Can Approve Temporary
Receives Approval Emails
No records found.
Emergency Contact
Credit Cards
Travel Settings
Travel Preferences
International Travel
Frequent-Traveler Programs
Assistants/Arrangers
Expense Settings
Expense Information
Expense Delegates
Expense Preferences
Expense Approvers
Favorite Attendees
Other Settings
System Settings
Connected Apps
Concur Connect

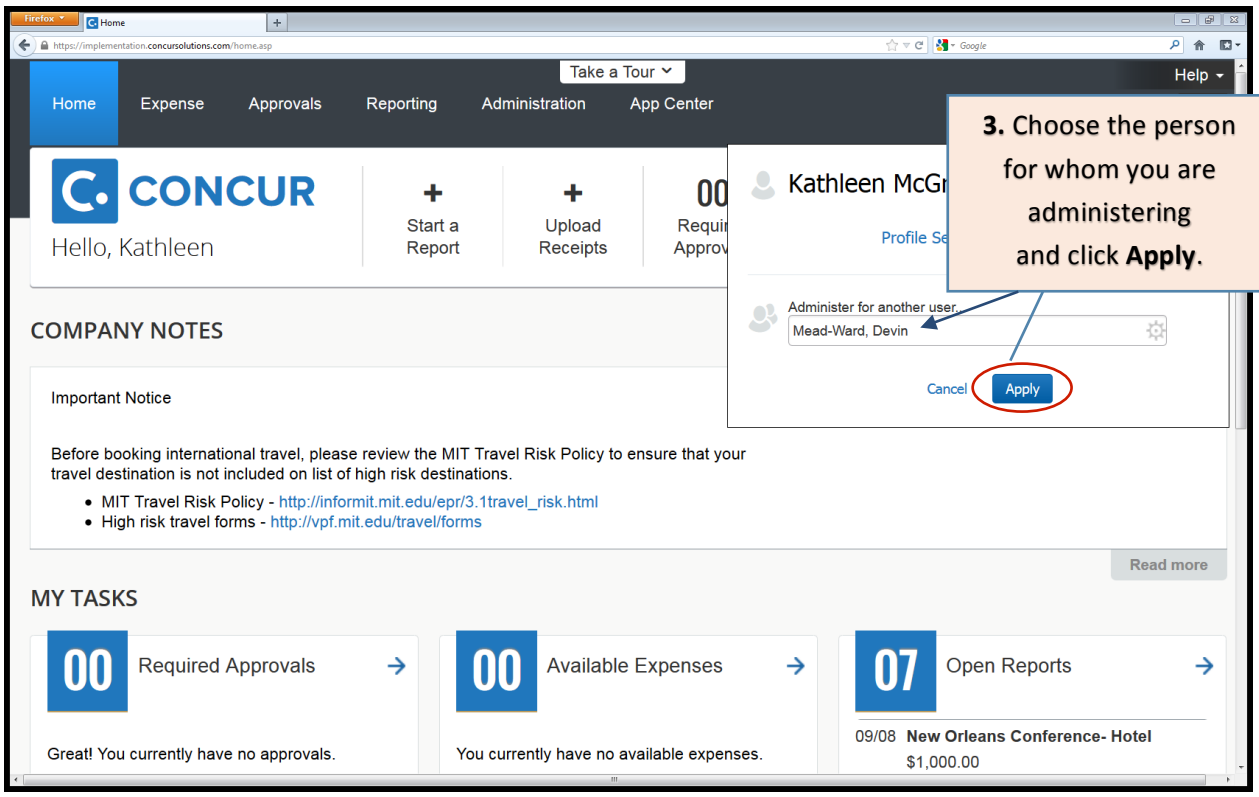

CONCUR
Expense
Approvals
Reporting
App Center
Administration
Help
Profile
Expense Delegates
Delegates
Delegate For
Add
Save
Delete
Delegates are employees who are allowed to perform work on behalf of other employees.
Name
Can Prepare
Can Submit Reports
Can View Receipts
Receives Emails
Can Approve
Can Approve Temporary
Receives Approval Emails
Mead-Ward, Devin
DEVINMW@MIT.EDU
6. Click Can Submit Reports and Receives Emails.
7. Click Save.
All set! The person you have added is now your expense delegate and is able to submit, edit, and view expense reports on your behalf.
Your Information
Personal Information
Company Information
Contact Information
Email Addresses
Emergency Contact
Credit Cards
Travel Settings
Programs
Assistants/Arrangers
Expense Settings
Expense Information
Expense Delegates
Expense Preferences
Expense Approvers
Favorite Attendees
Other Settings
System Settings
Connected Apps
Concur Connect

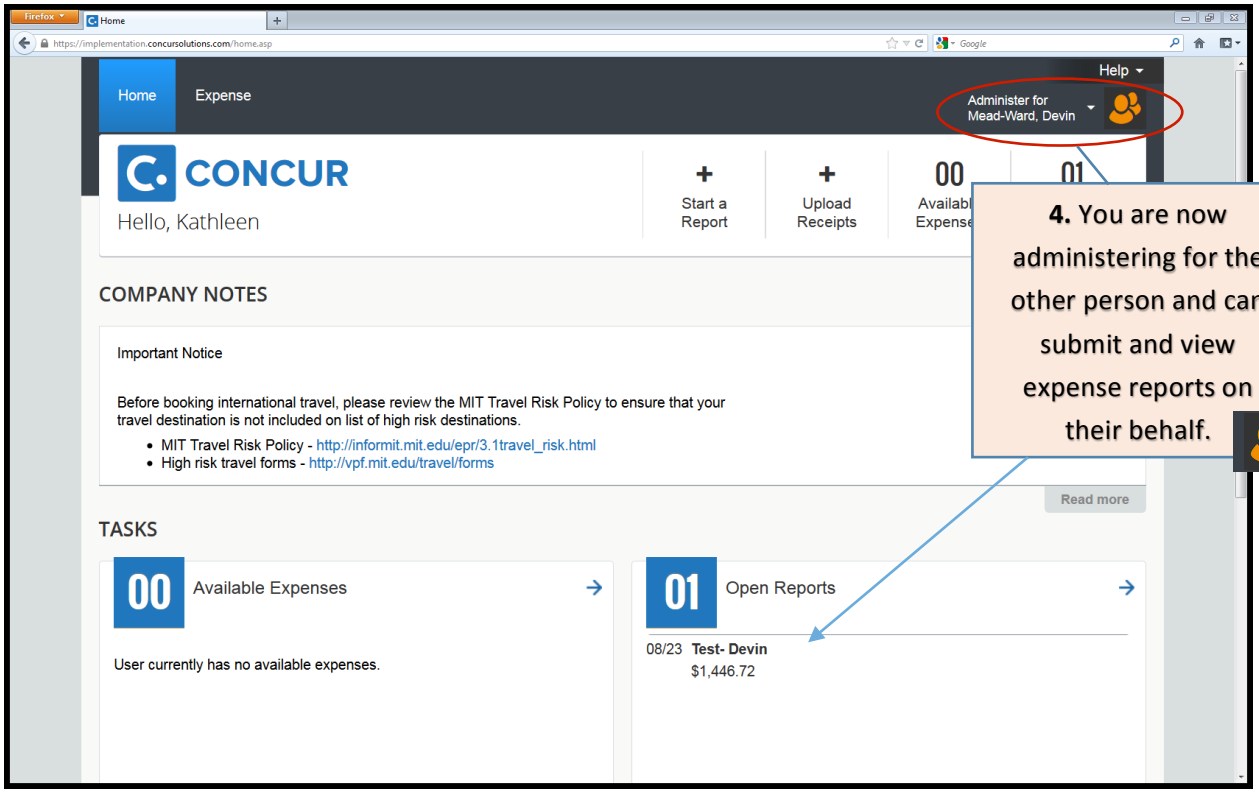
Acting as a Delegate

If you need to submit a Concur report for another individual, you must first go into their profile to act as their delegate. To do so, follow these steps from the Concur home page:

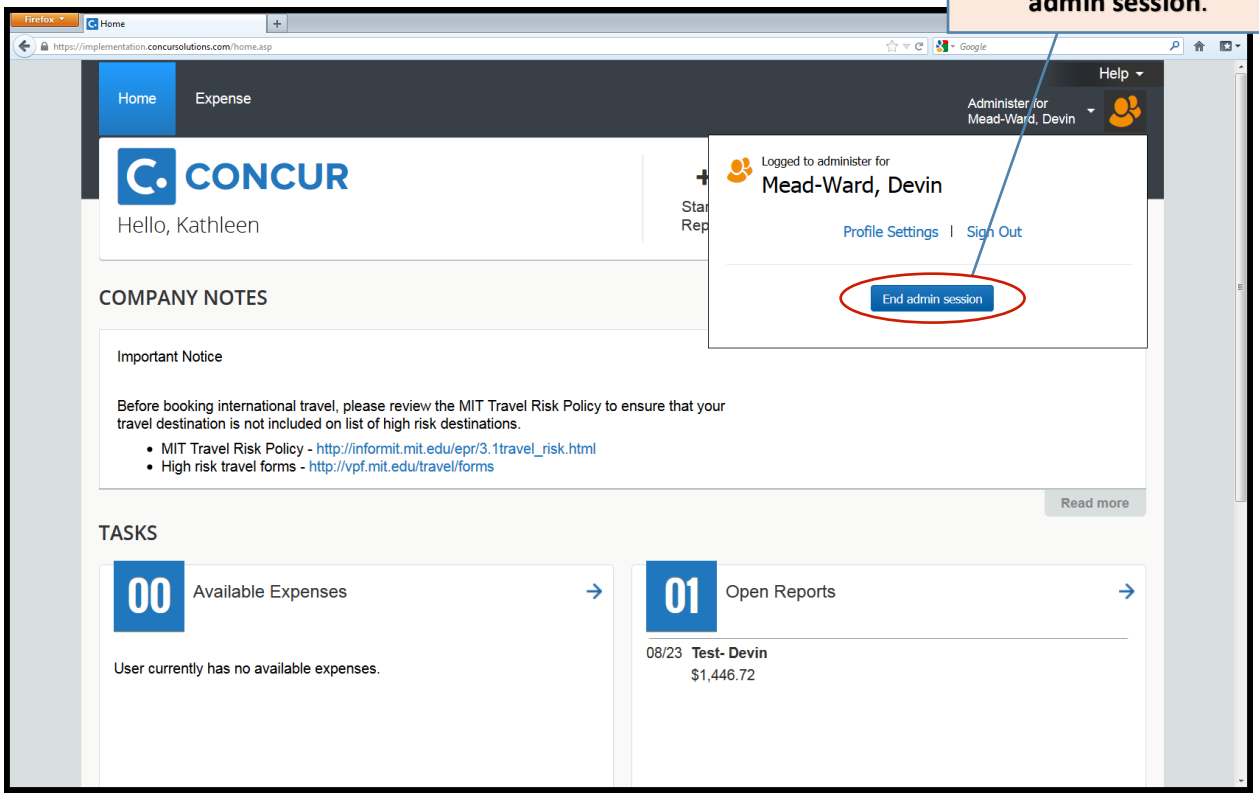





Home
Expense
Approvals
Reporting
Administration
App Center
Take a Tour
Help
CONCUR
Hello, Kathleen
Start a Report
Upload Receipts
Kathleen McGr
Profile Se
Administer for another user
Mead-Ward, Devin
Cancel
Apply
3. Choose the person for whom you are administering and click Apply.
COMPANY NOTES
Important Notice
Before booking international travel, please review the MIT Travel Risk Policy to ensure that your travel destination is not included on list of high risk destinations.
MIT Travel Risk Policy - http://informit.mit.edu/epr/3.1travel_risk.html
High risk travel forms - http://vpf.mit.edu/travel/forms
Read more
MY TASKS
00 Required Approvals
Great! You currently have no approvals.
00 Available Expenses
You currently have no available expenses.
07 Open Reports
09/08 New Orleans Conference- Hotel
$1,000.00


Home
Expense
Help
Administer for Mead-Ward, Devin
CONCUR
Hello, Kathleen
Start a Report
Upload Receipts
4. You are now administering for the other person and can submit and view expense reports on their behalf.
COMPANY NOTES
Important Notice
Before booking international travel, please review the MIT Travel Risk Policy to ensure that your travel destination is not included on list of high risk destinations.
MIT Travel Risk Policy - http://informit.mit.edu/epr/3.1travel_risk.html
High risk travel forms - http://vpf.mit.edu/travel/forms
Read more
TASKS
00 Available Expenses
User currently has no available expenses.
01 Open Reports
08/23 Test- Devin
$1,446.72

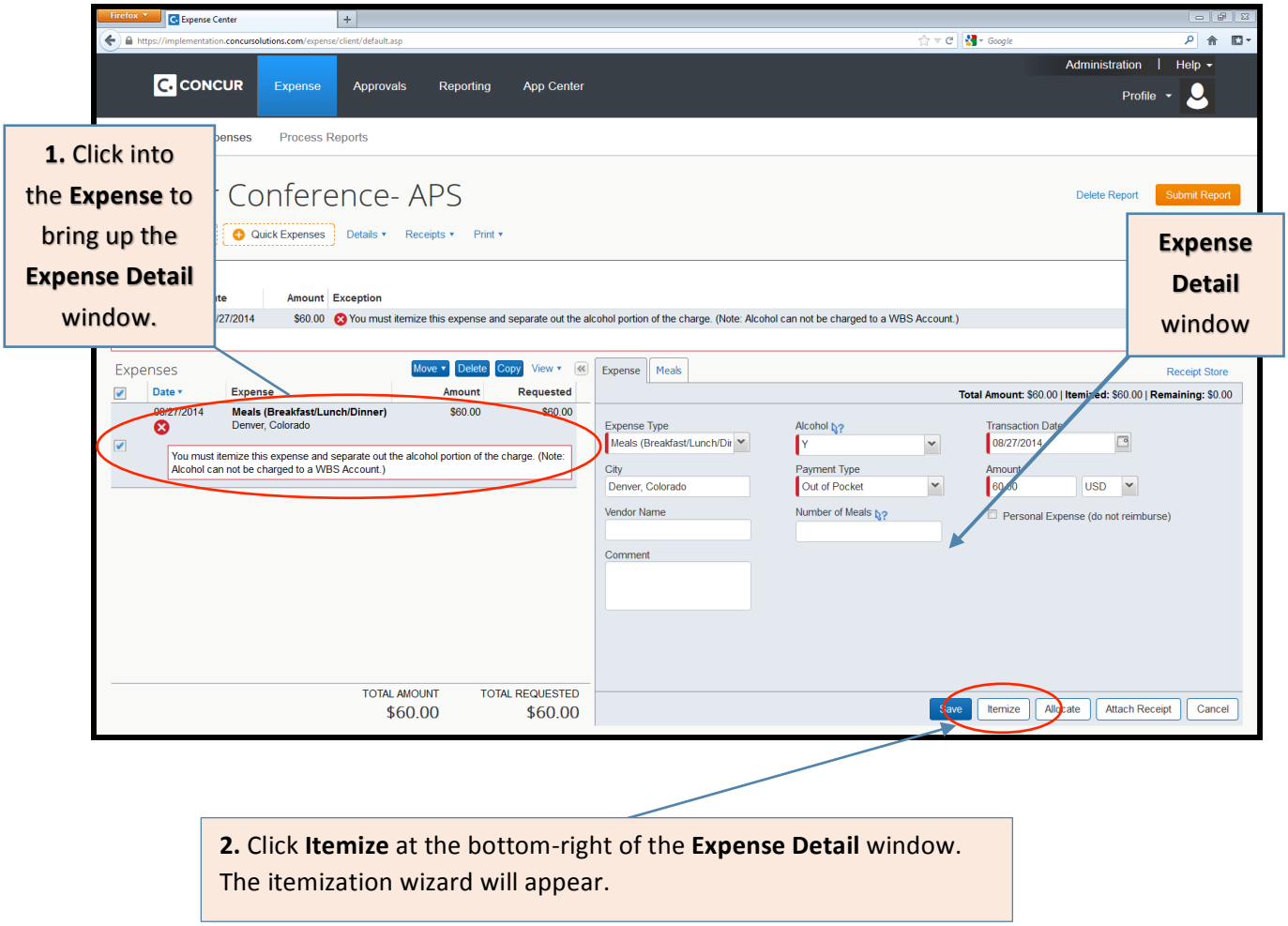
5. To stop administering for that person, click **End admin session**.

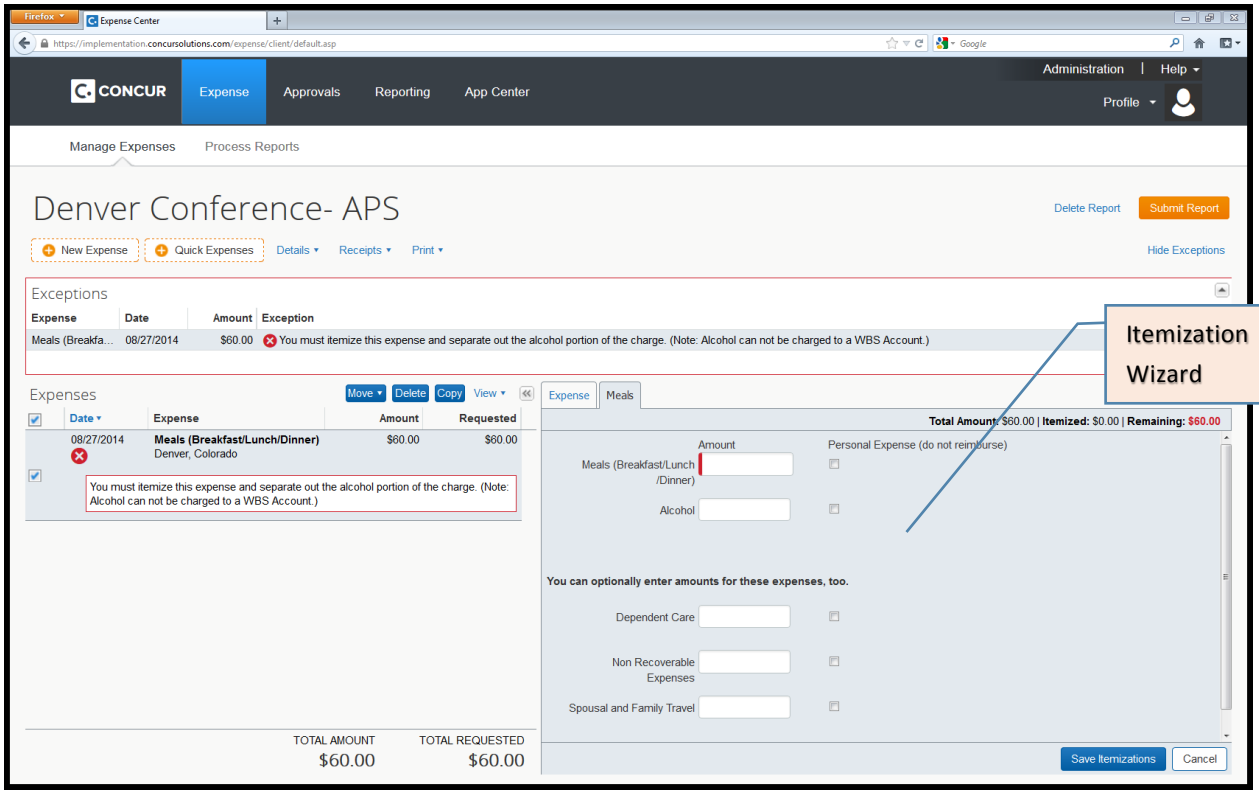


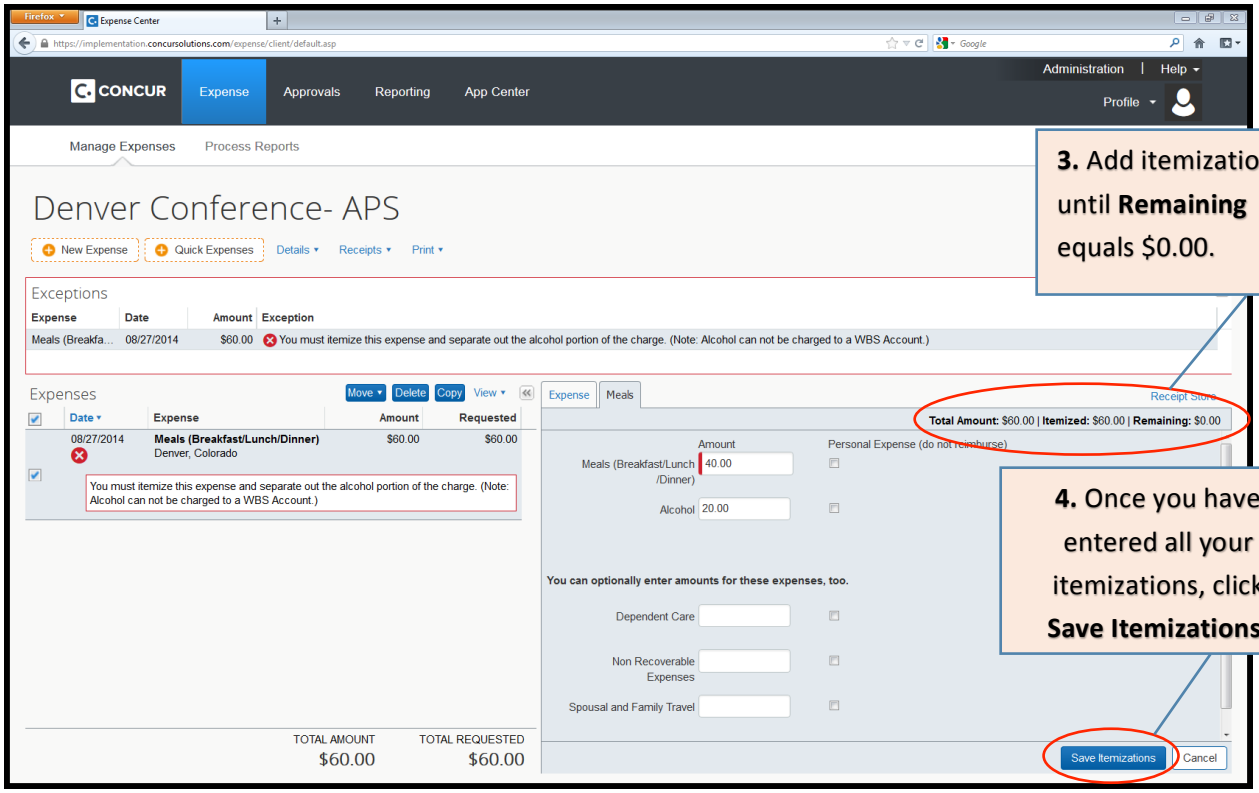
Using the Itemization Wizard

Itemizing within Concur refers to breaking an expense up into two or more sub-expense types. In this example below, we will break a meals expense up into meals and alcohol.

Within the body of your Concur report, in the expense list, click into the **Expense** you need to itemize. This will open the **Expense Detail** window.




Expense Center
https://implementation.concursolutions.com/expense/client/default.asp
CONCUR
Expense
Approvals
Reporting
App Center
Administration | Help
Profile
Manage Expenses
Process Reports
Denver Conference- APS
Delete Report
Submit Report
New Expense
Quick Expenses
Details
Receipts
Print
Hide Exceptions
Exceptions
Expense
Date
Amount
Exception
Meals (Breakfa...
08/27/2014
$60.00
You must itemize this expense and separate out the alcohol portion of the charge. (Note: Alcohol can not be charged to a WBS Account.)
Itemization Wizard
Expenses
Move
Delete
Copy
View
Date
Expense
Amount
Requested
08/27/2014
Meals (Breakfast/Lunch/Dinner)
Denver, Colorado
$60.00
$60.00
You must itemize this expense and separate out the alcohol portion of the charge. (Note: Alcohol can not be charged to a WBS Account.)
Expense
Meals
Total Amount: $60.00 | Itemized: $0.00 | Remaining: $60.00
Amount
Personal Expense (do not reimburse)
Meals (Breakfast/Lunch/Dinner)
Alcohol
You can optionally enter amounts for these expenses, too.
Dependent Care
Non Recoverable Expenses
Spousal and Family Travel
TOTAL AMOUNT
$60.00
TOTAL REQUESTED
$60.00
Save Itemizations
Cancel

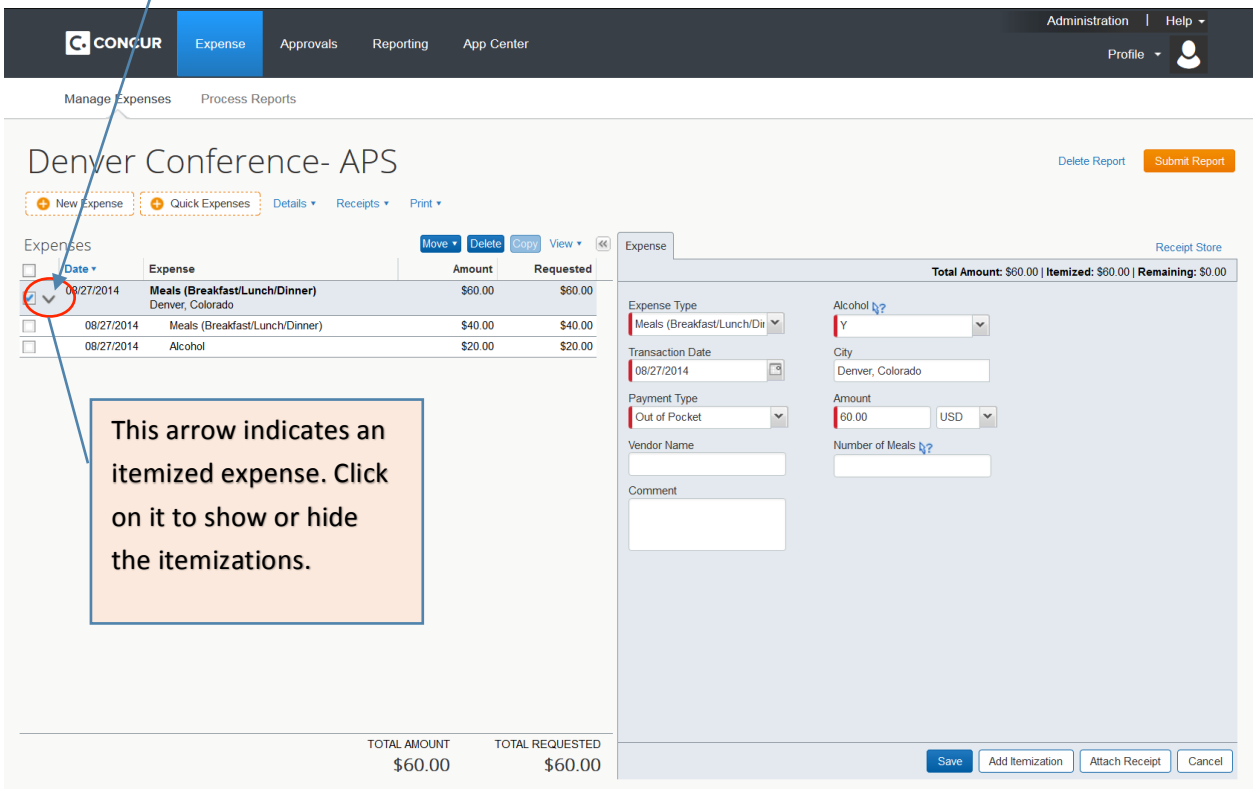

Expense Center
https://implementation.concursolutions.com/expense/client/default.asp
CONCUR
Expense
Approvals
Reporting
App Center
Administration | Help
Profile
Manage Expenses
Process Reports
Denver Conference- APS
New Expense
Quick Expenses
Details
Receipts
Print
Exceptions
Expense
Date
Amount
Exception
Meals (Breakfa...
08/27/2014
$60.00
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
Date
Expense
Amount
Requested
08/27/2014
Meals (Breakfast/Lunch/Dinner)
Denver, Colorado
$60.00
$60.00
You must itemize this expense and separate out the alcohol portion of the charge. (Note: Alcohol can not be charged to a WBS Account.)
Expense
Meals
Total Amount: $60.00 | Itemized: $60.00 | Remaining: $0.00
Amount
Personal Expense (do not reimburse)
Meals (Breakfast/Lunch/Dinner)
40.00
Alcohol
20.00
You can optionally enter amounts for these expenses, too.
Dependent Care
Non Recoverable Expenses
Spousal and Family Travel
TOTAL AMOUNT
$60.00
TOTAL REQUESTED
$60.00
Save Itemizations
Cancel
3. Add itemizations until Remaining equals $0.00.
4. Once you have entered all your itemizations, click Save Itemizations.

Enter the amount for each itemization to reach the expense total. In this example, the two itemizations are **Meals**, $40.00, and **Alcohol**, $20.00. The itemization wizard will show the most common itemization expense types at the top (and less frequently used options below).

Note the totals at the top of the itemization window: **Total, Itemized**, and **Remaining**. You will need to add itemizations and amounts until **Remaining** equals zero.

Once you have entered expense types and amounts, click **Save Itemizations**.

A new icon (arrow) will appear on the left-hand side of the **Expense** line item within the **Expenses** list. Click on the icon to show or hide the **Itemization Detail**.

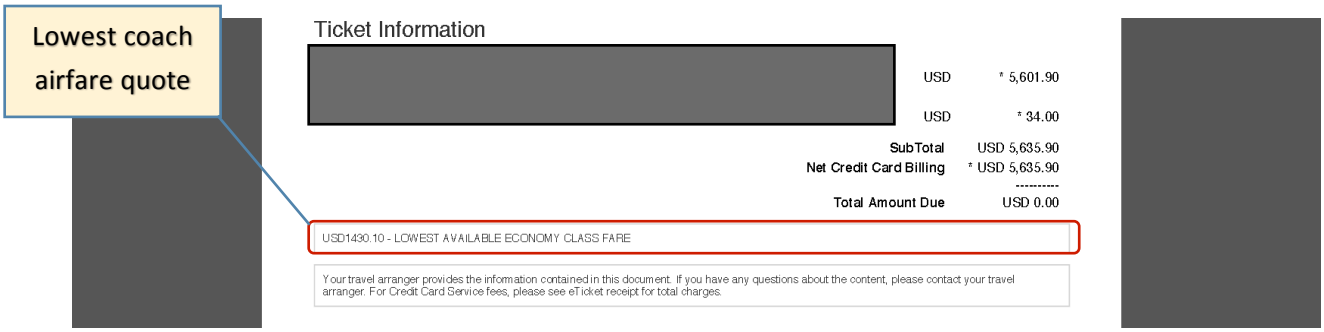


Instructions for documenting and itemizing the lowest coach fare and airfare difference when business class is flown:

Business class airfare (or first class if business isn't available on that flight) is only reimbursable when a flight has an in-air flying time of 6 hours or more or when a round-trip ticket has legs over 6 hours. The difference between the lowest equivalent coach fare and the actual business class ticket must be itemized as expense type "airfare difference" and allocated to a non-sponsored cost object. This is necessary since the difference between coach and business needs to map to the unallowable GL (general ledger) account.

To document and itemize the lowest coach fare and airfare difference, and allocate if needed, follow these steps:

1. If you have booked your business class tickets through our preferred travel agency, Travel Collaborative, the agent should provide the lowest coach fare on the itinerary:



If the lowest coach quote has been provided, make sure it's attached with the receipts and then skip to step **6** (itemizing a business class airfare expense).

If the lowest coach quote has not been provided, start with Step 1 (next page).

Documenting an equivalent lowest coach fare when it is not provided by a travel agent:

If you booked the airfare on your own, please use Expedia or an equivalent travel booking website to look up a trip between the same departure and destination airports, for the same days of the week, 4-5 weeks in the future, avoiding major holidays. In this example, we will look up a coach fare for a business class trip to Edinburgh:

DATE: Sun, Jun 07

Flight: DELTA AIR LINES INC			
From	BOSTON, MA	Departs	7:39pm
To	PARIS DE GAULLE, FRANCE	Arrives	8:35am
Departure Terminal	A	Arrival Terminal	2E
Duration	06hr(s) :56min(s)	Class	Business
Type	76W	Meal	Dinner
Stop(s)	Non Stop		
Seat(s) Details		Seat(s) - 06A	

DATE: Mon, Jun 08

Flight: DELTA AIR LINES INC			
From	PARIS DE GAULLE, FRANCE	Departs	10:05am
To	EDINBURGH, UNITED KINGDOM	Arrives	11:05am
Departure Terminal	2E		
Duration	02hr(s) :00min(s)	Class	Business
Type	RJ85-REGIONAL JET 85	Meal	
Stop(s)	Non Stop		
Seat(s) Details		Seat(s) - 02A	

DATE: Sun, Jun 14

Flight: DELTA AIR LINES INC			
From	EDINBURGH, UNITED KINGDOM	Departs	11:45am
To	PARIS DE GAULLE, FRANCE	Arrives	2:50pm
		Arrival Terminal	2E
Duration	02hr(s) :05min(s)	Class	Business
Type	RJ85-REGIONAL JET 85	Meal	
Stop(s)	Non Stop		
Seat(s) Details		Seat(s) - 03F	

DATE: Sun, Jun 14

Flight: DELTA AIR LINES INC Operated by: AIR FRANCE			
From	PARIS DE GAULLE, FRANCE	Departs	4:45pm
To	BOSTON, MA	Arrives	6:25pm
Departure Terminal	2E	Arrival Terminal	E
Duration	07hr(s) :40min(s)	Class	Business
Type	BOEING 744 JET	Meal	Dinner
Stop(s)	Non Stop		
Seat(s) Details		Seat(s) - 06L	

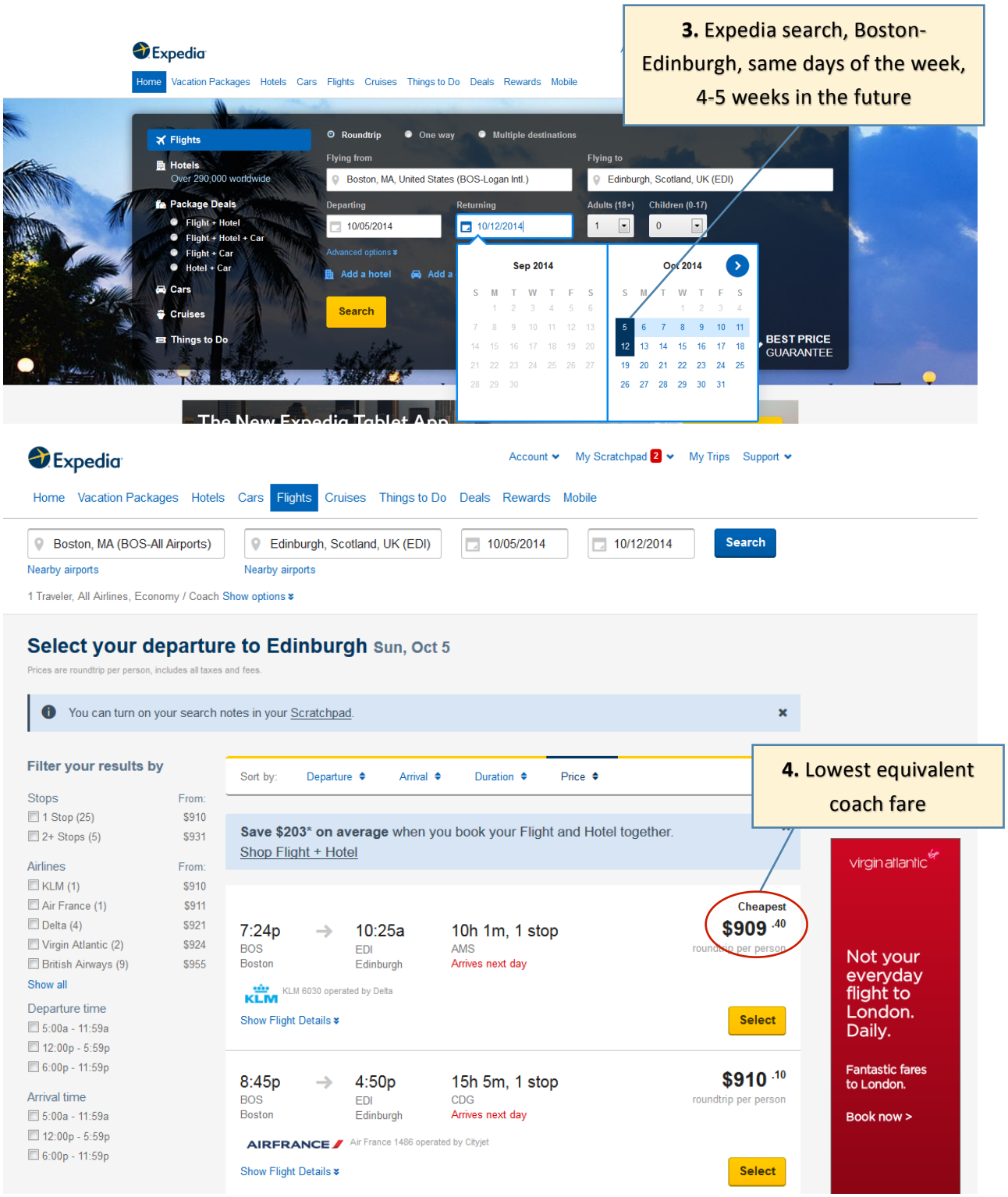
Ticket Information

Ticket Number

USD * 7,249.10

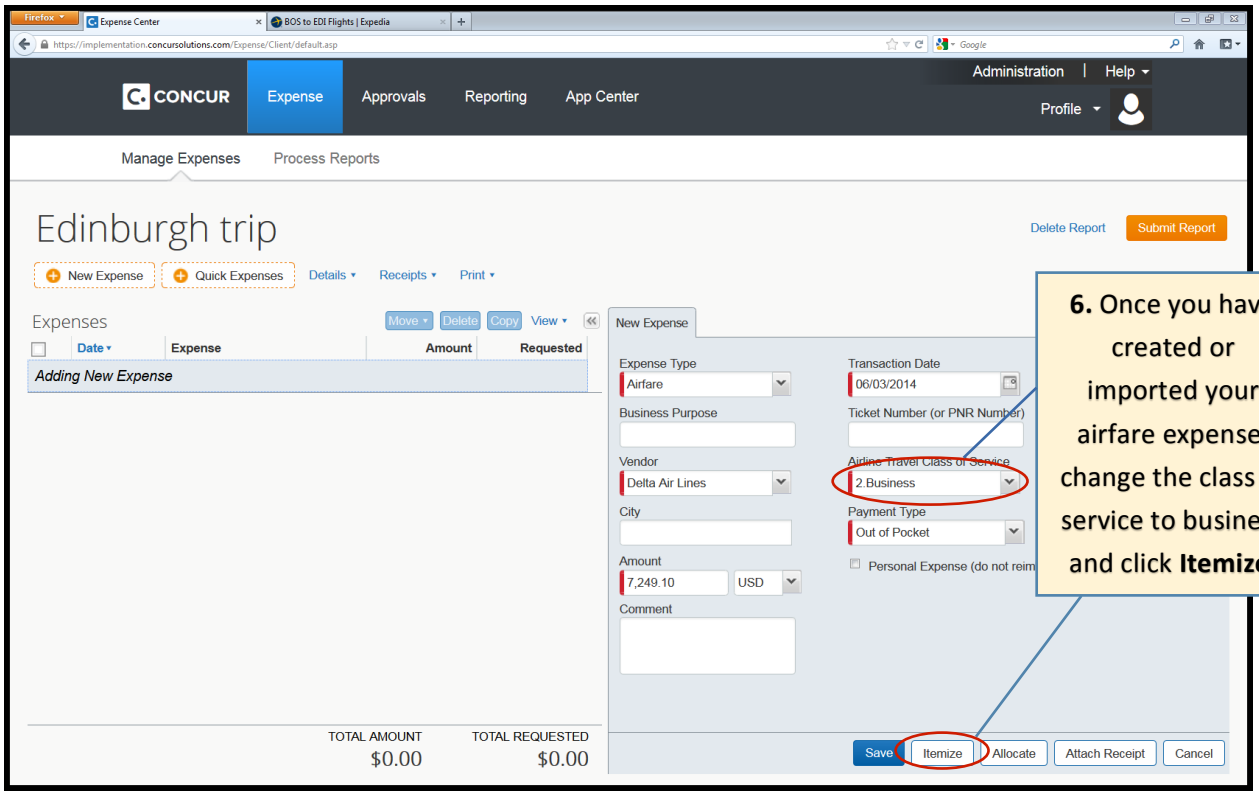
1. This business class ticket is from Boston to Edinburgh, UK, round trip, leaving Sunday, June 7, and returning Sunday, June 14.

2. So, to find an equivalent lowest coach fare we will look up a round trip from Boston to Edinburgh, 4-5 weeks in the future, from a Sunday to the next Sunday.

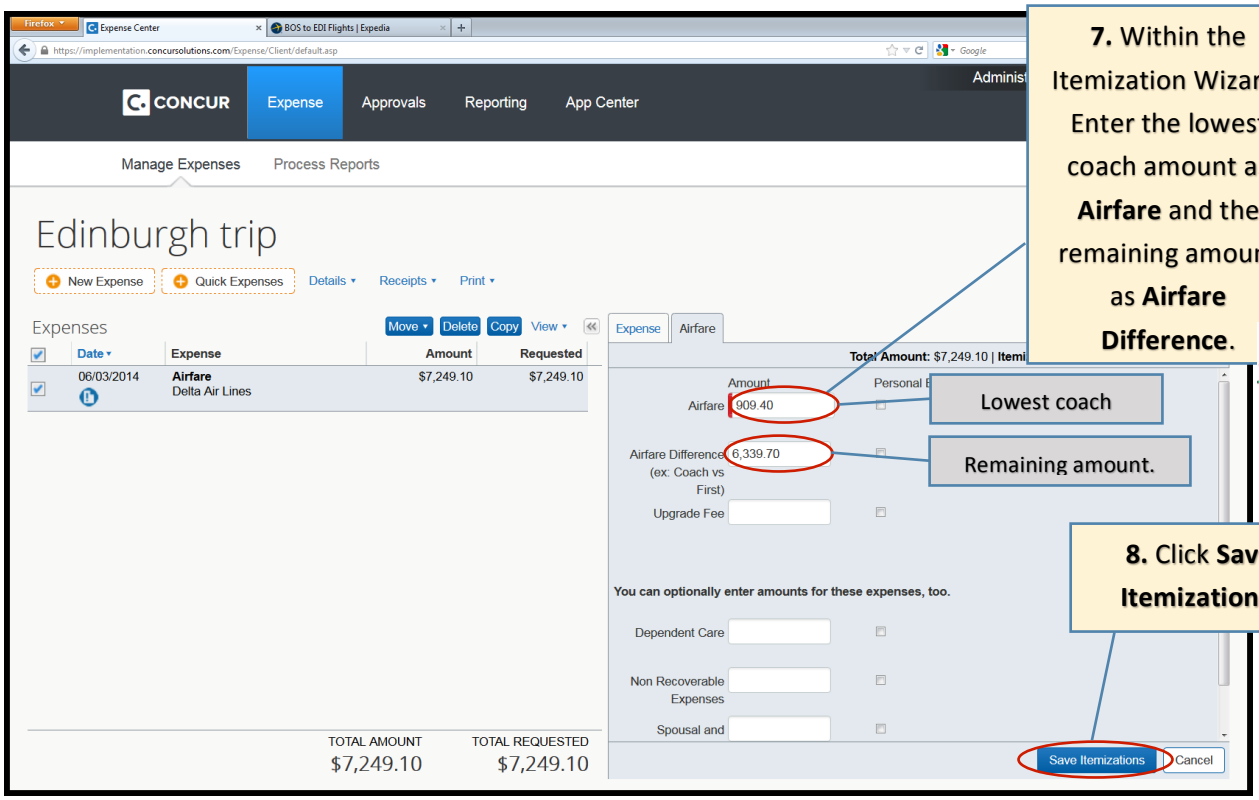


5. Once you have a lowest coach quote, attach an image of the quote with the receipts in your Concur report (**Receipts>Attach receipt images**). Then, you will need to itemize the airfare expense.

How to itemize a business class airfare expense:



6. Once you have created or imported your airfare expense, change the class of service to business and click **Itemize**.



7. Within the Itemization Wizard, Enter the lowest coach amount as **Airfare** and the remaining amount as **Airfare Difference**.

Lowest coach

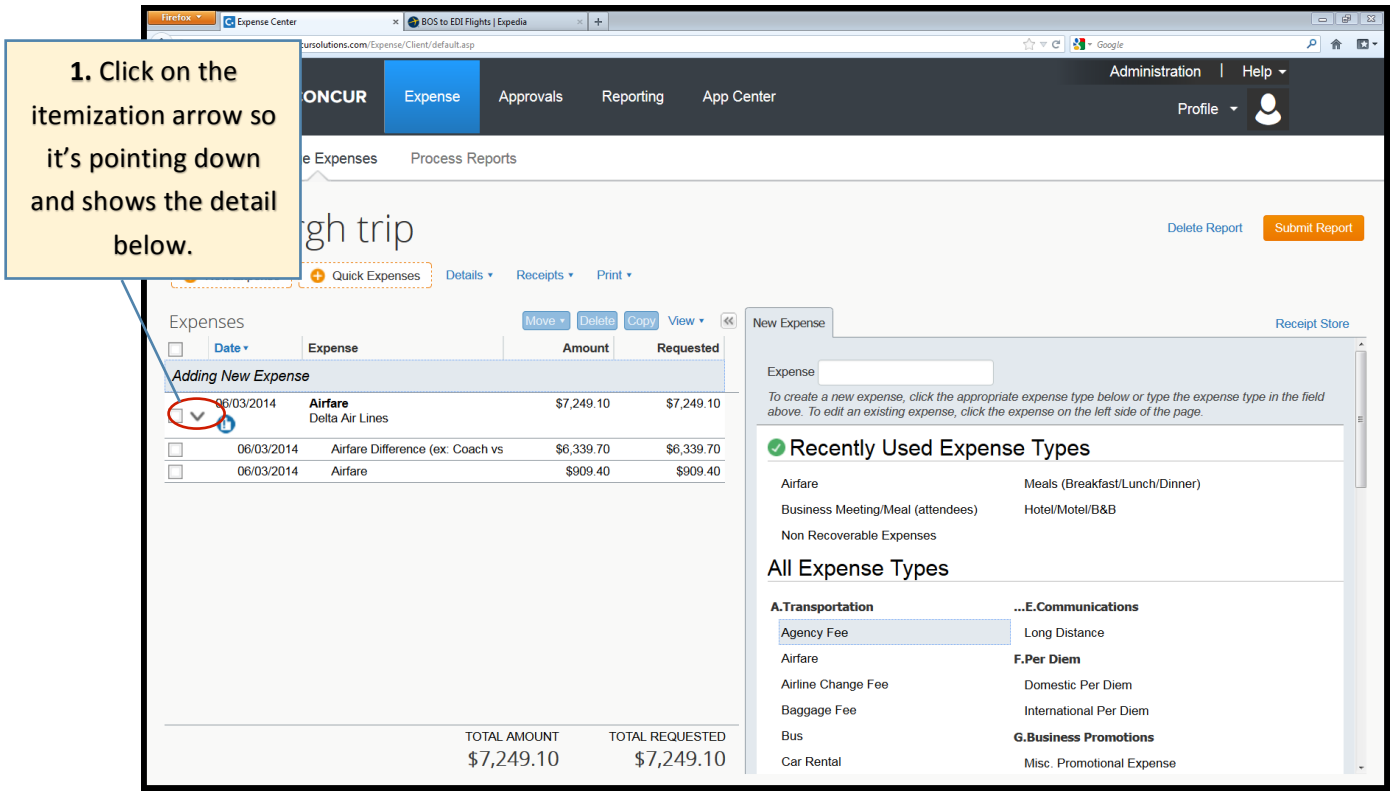
Remaining amount.

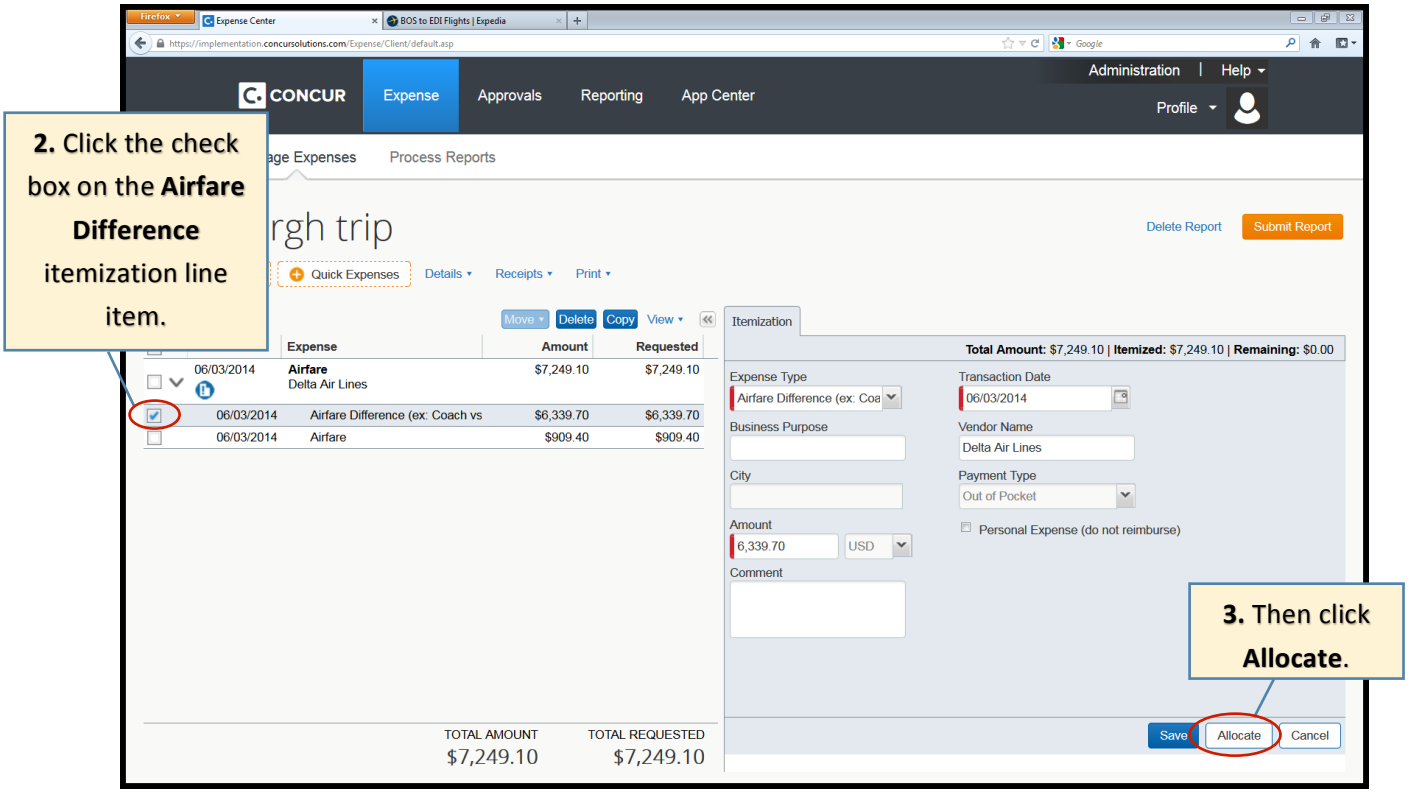
8. Click **Save Itemizations**.

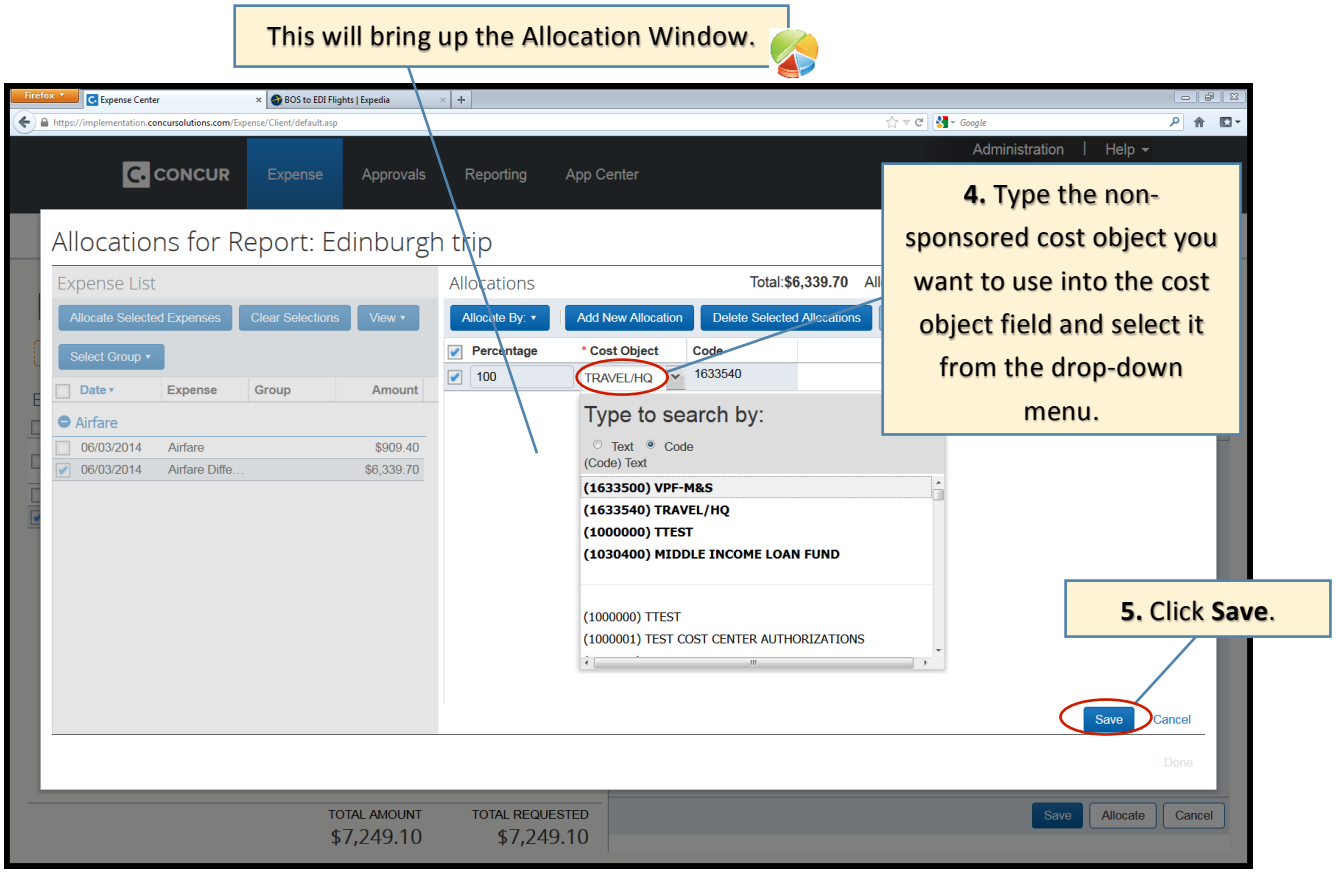
9. If you entered a non-sponsored cost object in the report header, you are all set.

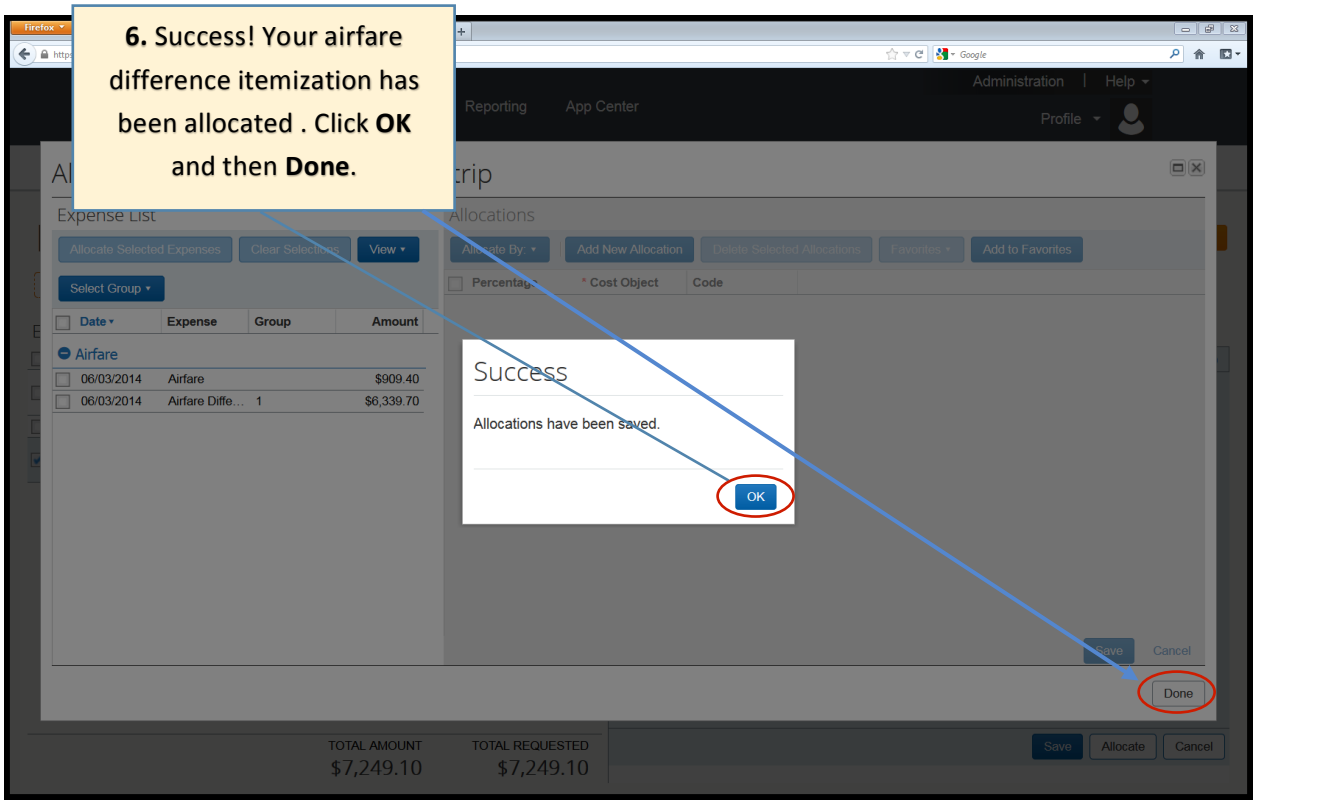
If you entered a sponsored cost object in the report header, please allocate the **Airfare Difference** itemization to a non-sponsored cost object (see following steps).

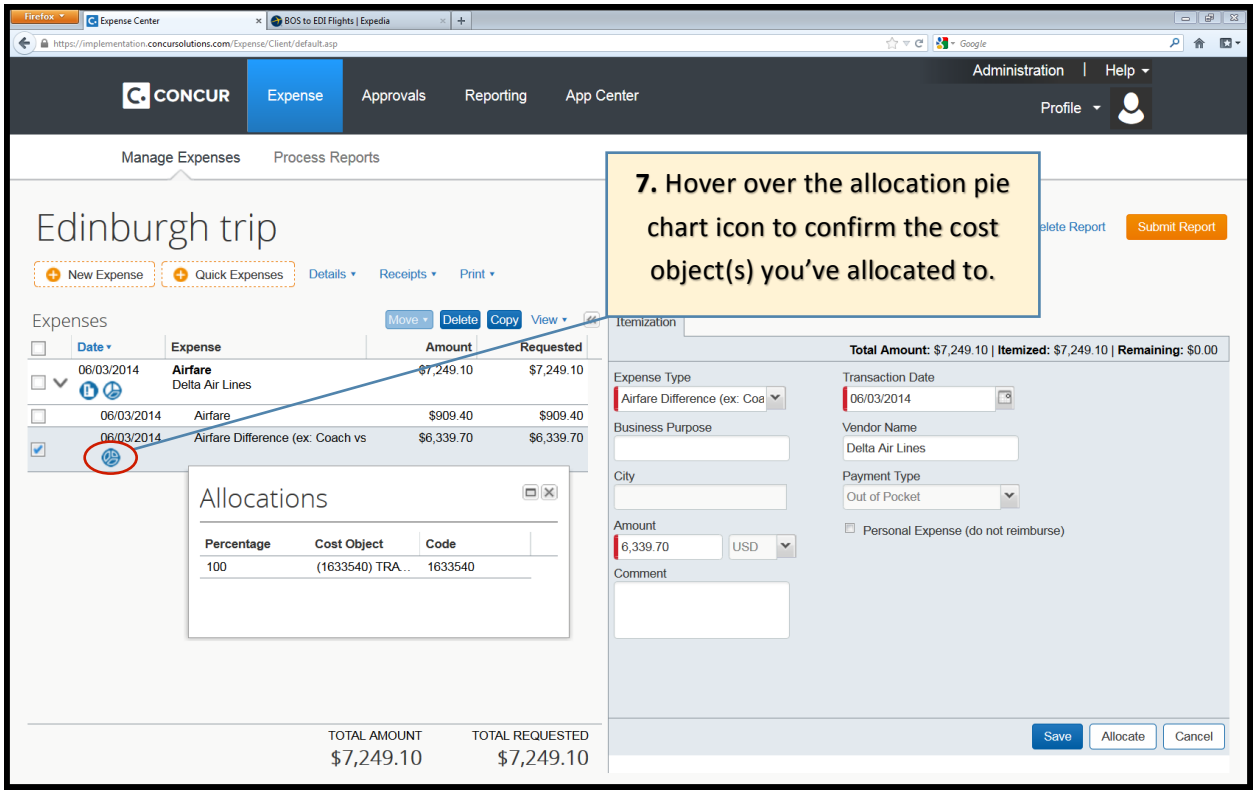
How to allocate an airfare difference itemization to a non-sponsored cost object:






This will bring up the Allocation Window.
CONCUR
Expense
Approvals
Reporting
App Center
Administration
Help
Allocations for Report: Edinburgh trip
Expense List
Allocate Selected Expenses
Clear Selections
View
Select Group
Date
Expense
Group
Amount
Airfare
06/03/2014 Airfare $909.40
06/03/2014 Airfare Diffe... $6,339.70
Allocations
Total:$6,339.70
Allocate By:
Add New Allocation
Delete Selected Allocations
Percentage
* Cost Object
Code
100
TRAVEL/HQ
1633540
Type to search by:
Text
Code
(Code) Text
(1633500) VPF-M&S
(1633540) TRAVEL/HQ
(1000000) TTEST
(1030400) MIDDLE INCOME LOAN FUND
(1000000) TTEST
(1000001) TEST COST CENTER AUTHORIZATIONS
4. Type the non-sponsored cost object you want to use into the cost object field and select it from the drop-down menu.
5. Click Save.
Save
Cancel
Done
TOTAL AMOUNT
$7,249.10
TOTAL REQUESTED
$7,249.10
Save
Allocate
Cancel

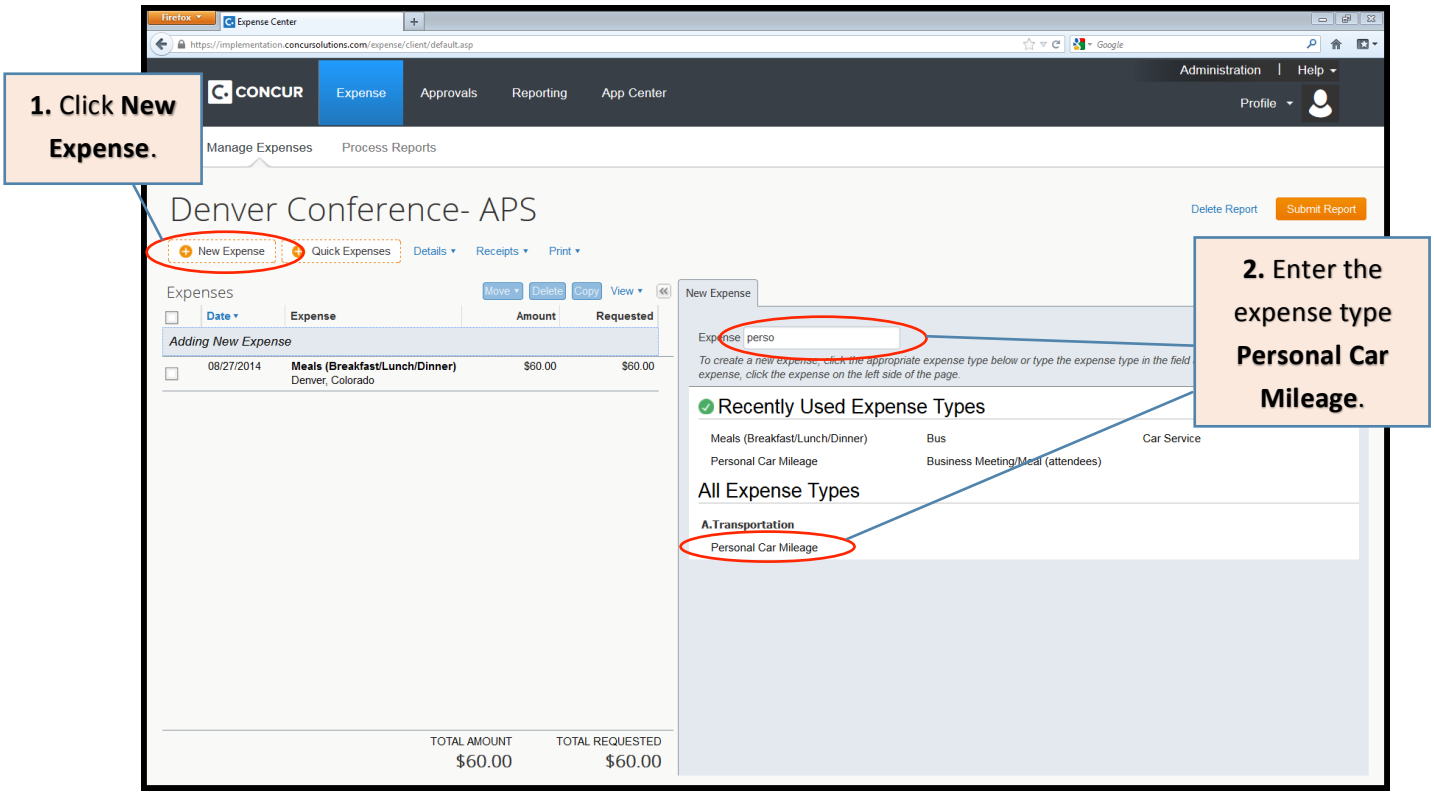

6. Success! Your airfare difference itemization has been allocated . Click OK and then Done.
Administration
Help
Reporting
App Center
Profile
Expense List
Allocate Selected Expenses
Clear Selections
View
Select Group
Allocations
Add New Allocation
Delete Selected Allocations
Favorites
Add to Favorites
Date
Expense
Group
Amount
Airfare
06/03/2014 Airfare $909.40
06/03/2014 Airfare Diffe... 1 $6,339.70
Success
Allocations have been saved.
OK
Save
Cancel
Done
TOTAL AMOUNT
$7,249.10
TOTAL REQUESTED
$7,249.10
Save
Allocate
Cancel

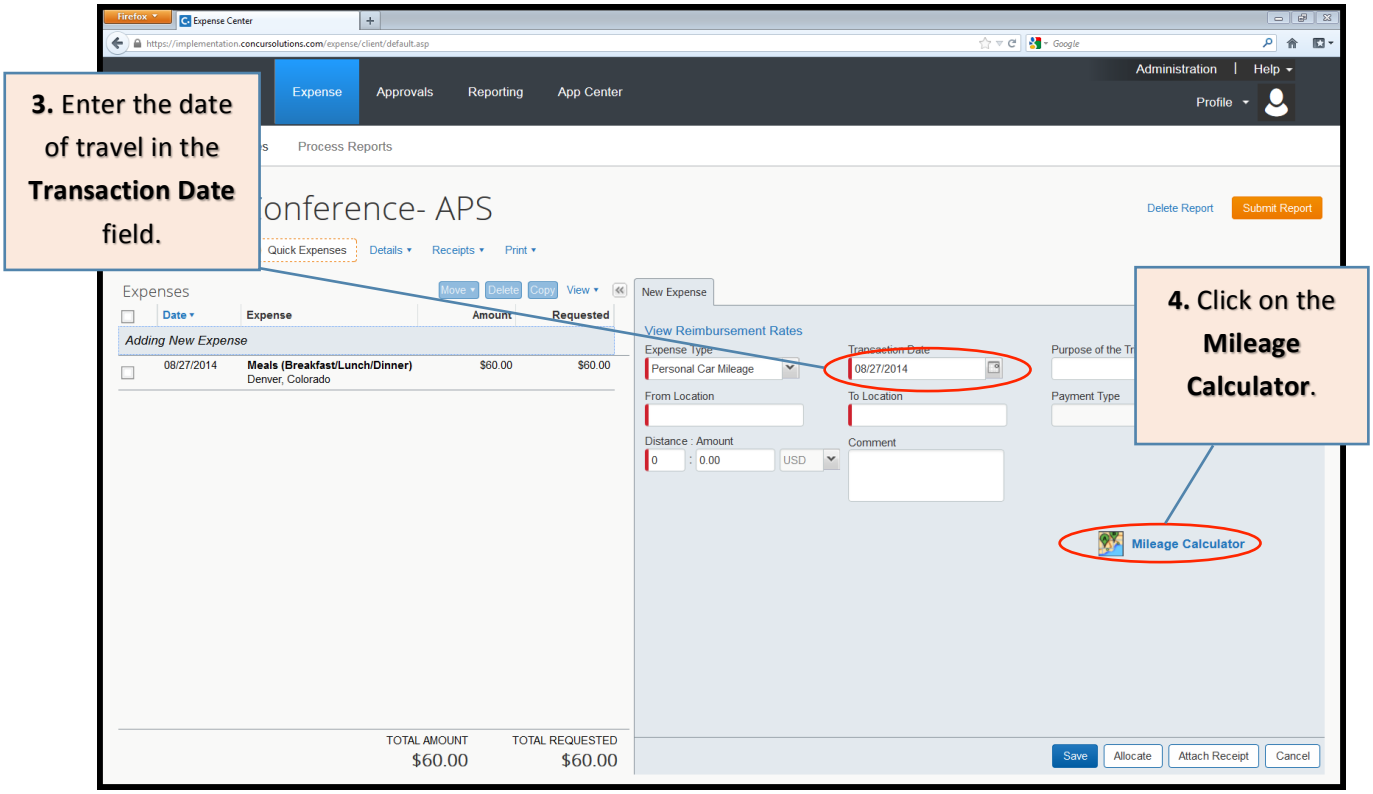


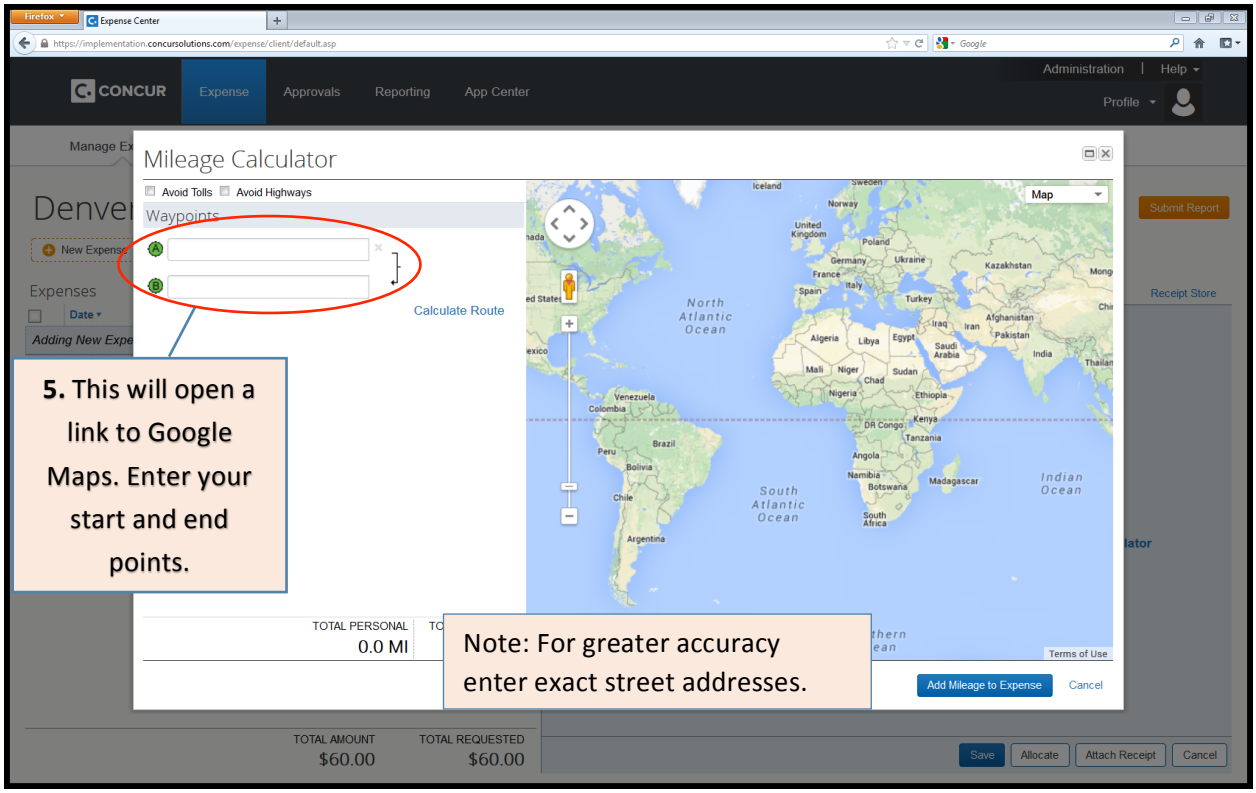
Remember, when business class airfare is being claimed from MIT, make sure to document the lowest coach fare, itemize the airfare and airfare difference and then allocate the difference to a non-sponsored account if needed.

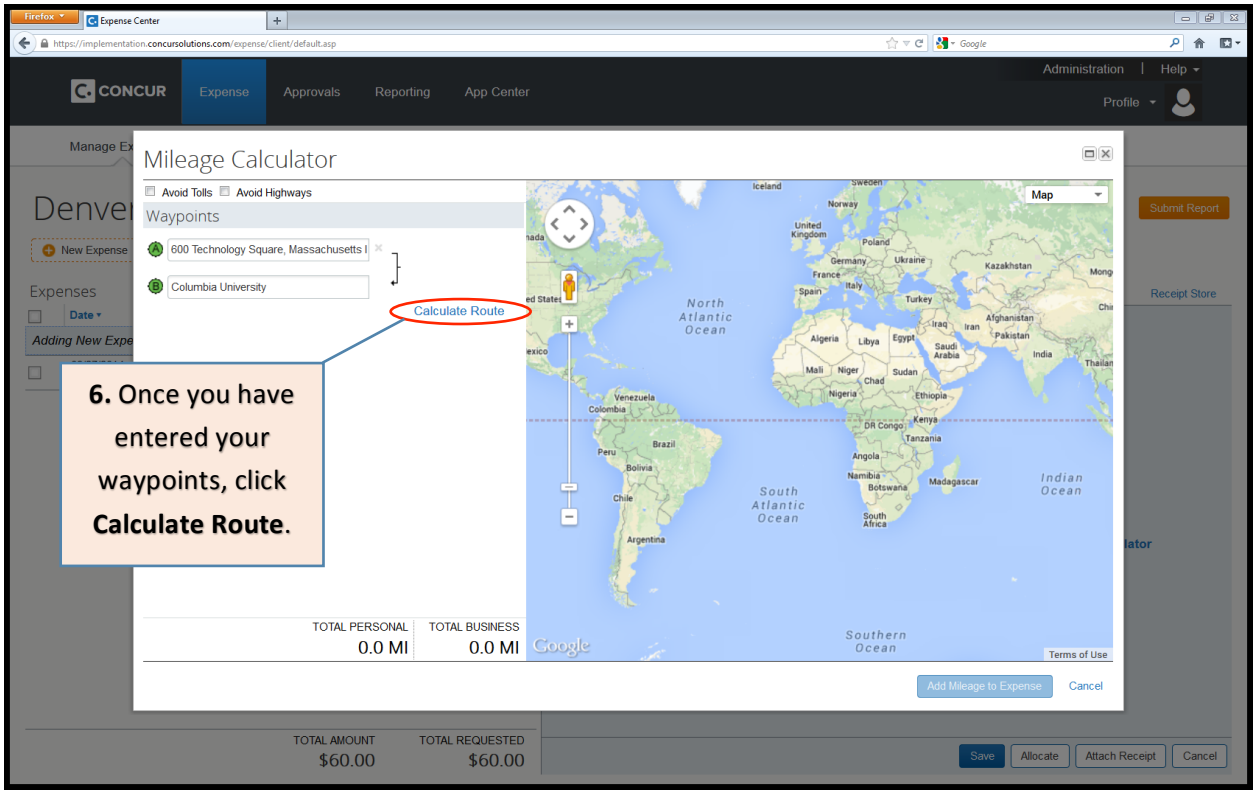
Document **Itemize** **Allocate**

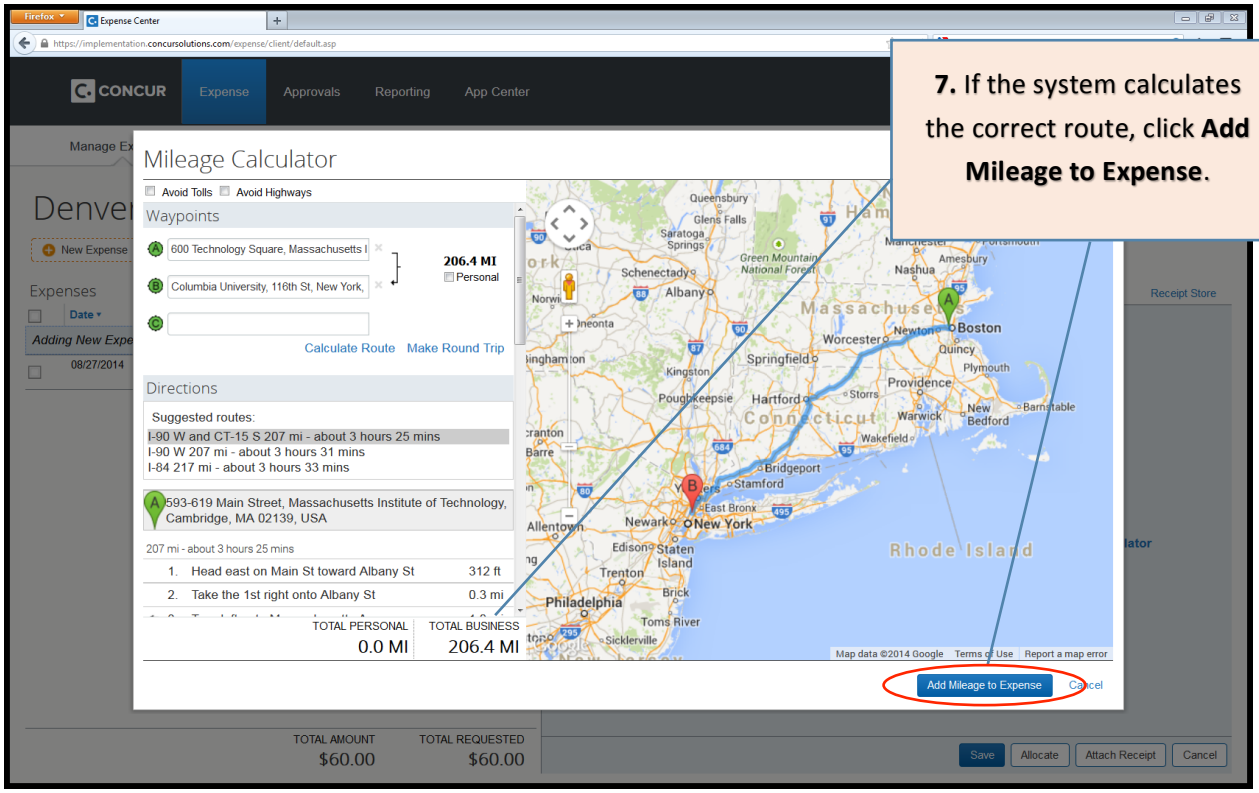
Using the Mileage Calculator Tool

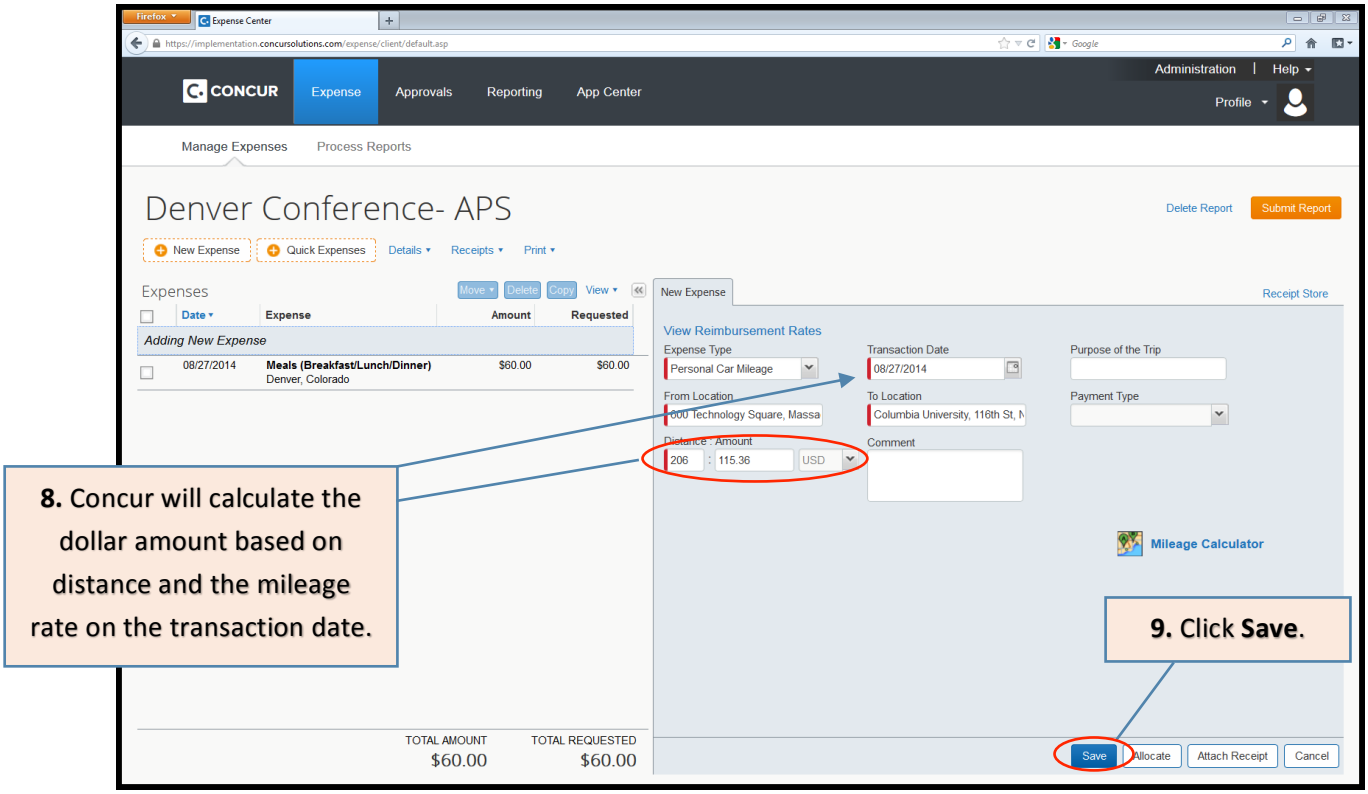



3. Enter the date of travel in the Transaction Date field.
4. Click on the Mileage Calculator.
Expense
Approvals
Reporting
App Center
Administration
Help
Profile
Process Reports
Delete Report
Submit Report
Quick Expenses
Details
Receipts
Print
Expenses
Move
Delete
Copy
View
Date
Expense
Amount
Requested
Adding New Expense
08/27/2014
Meals (Breakfast/Lunch/Dinner)
Denver, Colorado
$60.00
$60.00
New Expense
View Reimbursement Rates
Expense Type
Personal Car Mileage
Transaction Date
08/27/2014
From Location
To Location
Payment Type
Distance : Amount
Comment
USD
Mileage Calculator
TOTAL AMOUNT
$60.00
TOTAL REQUESTED
$60.00
Save
Allocate
Attach Receipt
Cancel


CONCUR
Expense
Approvals
Reporting
App Center
Administration
Help
Profile
Mileage Calculator
Avoid Tolls
Avoid Highways
Waypoints
Calculate Route
Map
5. This will open a link to Google Maps. Enter your start and end points.
Note: For greater accuracy enter exact street addresses.
TOTAL PERSONAL
0.0 MI
Terms of Use
Add Mileage to Expense
Cancel
TOTAL AMOUNT
$60.00
TOTAL REQUESTED
$60.00
Save
Allocate
Attach Receipt
Cancel


Mileage Calculator
Avoid Tolls
Avoid Highways
Waypoints
600 Technology Square, Massachusetts I
Columbia University
Calculate Route
6. Once you have entered your waypoints, click Calculate Route.
TOTAL PERSONAL
0.0 MI
TOTAL BUSINESS
0.0 MI
Add Mileage to Expense
Cancel
TOTAL AMOUNT
$60.00
TOTAL REQUESTED
$60.00
Save
Allocate
Attach Receipt
Cancel


Mileage Calculator
Avoid Tolls
Avoid Highways
Waypoints
600 Technology Square, Massachusetts I
Columbia University, 116th St, New York,
206.4 MI
Personal
Calculate Route
Make Round Trip
Directions
Suggested routes:
I-90 W and CT-15 S 207 mi - about 3 hours 25 mins
I-90 W 207 mi - about 3 hours 31 mins
I-84 217 mi - about 3 hours 33 mins
593-619 Main Street, Massachusetts Institute of Technology, Cambridge, MA 02139, USA
207 mi - about 3 hours 25 mins
1. Head east on Main St toward Albany St 312 ft
2. Take the 1st right onto Albany St 0.3 mi
7. If the system calculates the correct route, click Add Mileage to Expense.
TOTAL PERSONAL
0.0 MI
TOTAL BUSINESS
206.4 MI
Add Mileage to Expense
Cancel
TOTAL AMOUNT
$60.00
TOTAL REQUESTED
$60.00
Save
Allocate
Attach Receipt
Cancel

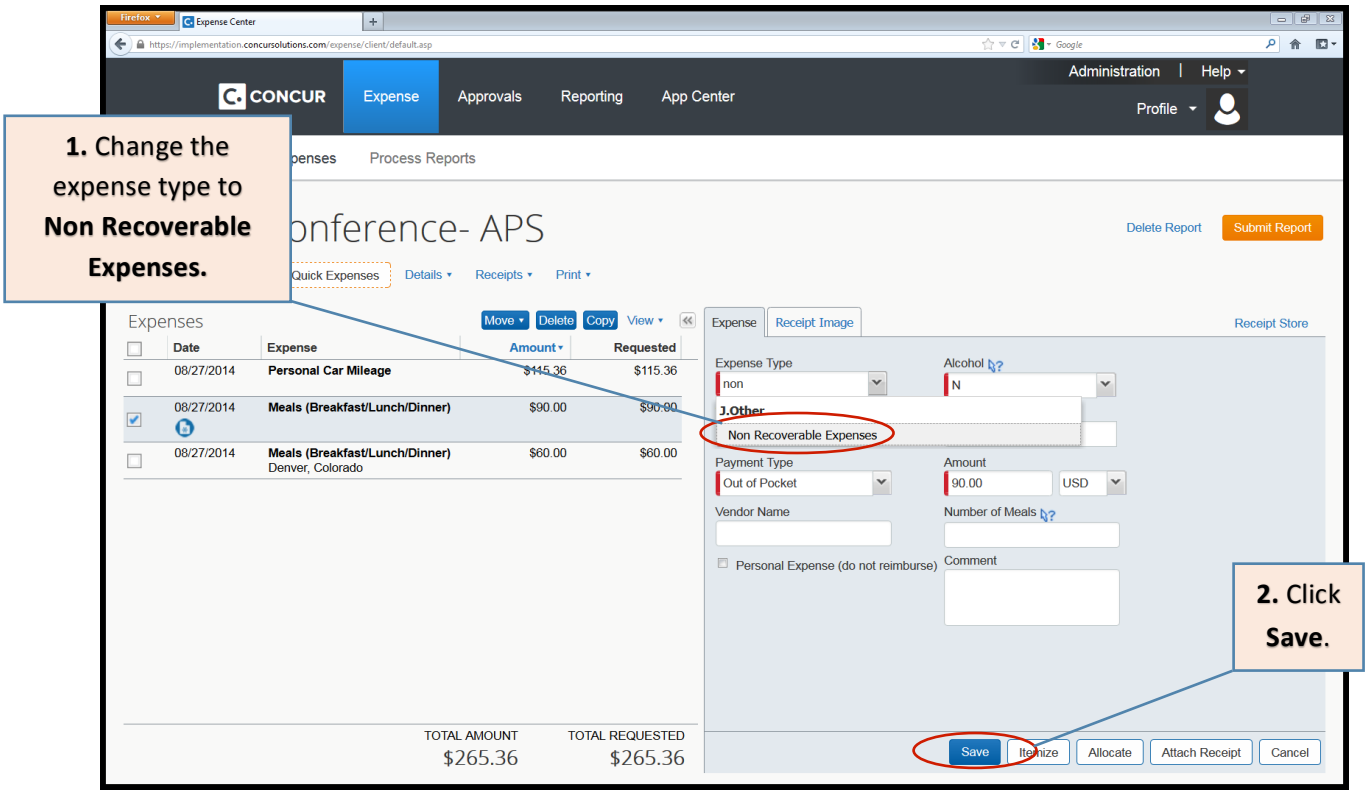

Expense Center
https://implementation.concursolutions.com/expense/client/default.asp
CONCUR
Expense
Approvals
Reporting
App Center
Administration | Help
Profile
Manage Expenses
Process Reports
Denver Conference- APS
Delete Report
Submit Report
New Expense
Quick Expenses
Details
Receipts
Print
Expenses
Move
Delete
Copy
View
Date
Expense
Amount
Requested
Adding New Expense
08/27/2014
Meals (Breakfast/Lunch/Dinner)
Denver, Colorado
$60.00
$60.00
TOTAL AMOUNT
$60.00
TOTAL REQUESTED
$60.00
New Expense
Receipt Store
View Reimbursement Rates
Expense Type
Personal Car Mileage
Transaction Date
08/27/2014
Purpose of the Trip
From Location
600 Technology Square, Massa
To Location
Columbia University, 116th St, N
Payment Type
Distance : Amount
206
115.36
USD
Comment
Mileage Calculator
Save
Allocate
Attach Receipt
Cancel
8. Concur will calculate the dollar amount based on distance and the mileage rate on the transaction date.
9. Click Save.

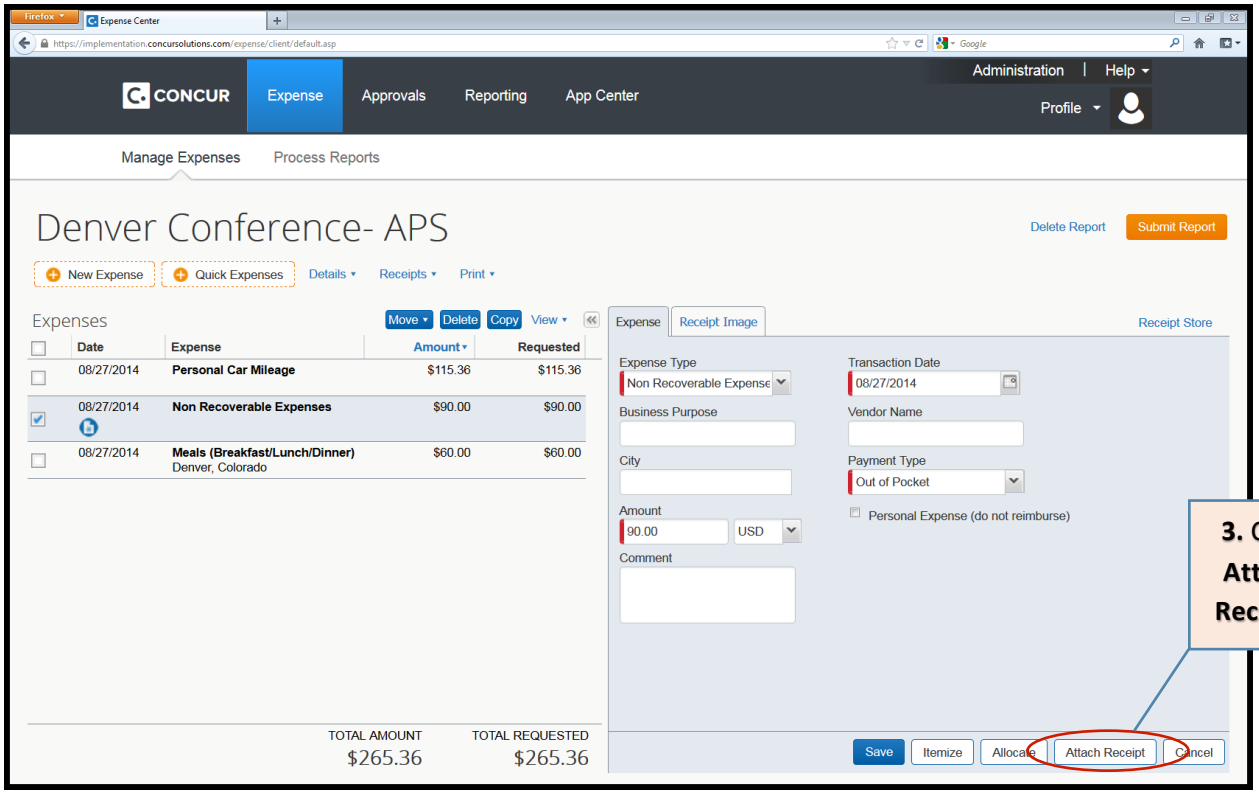
Attaching a Missing Receipt Affidavit to an Expense

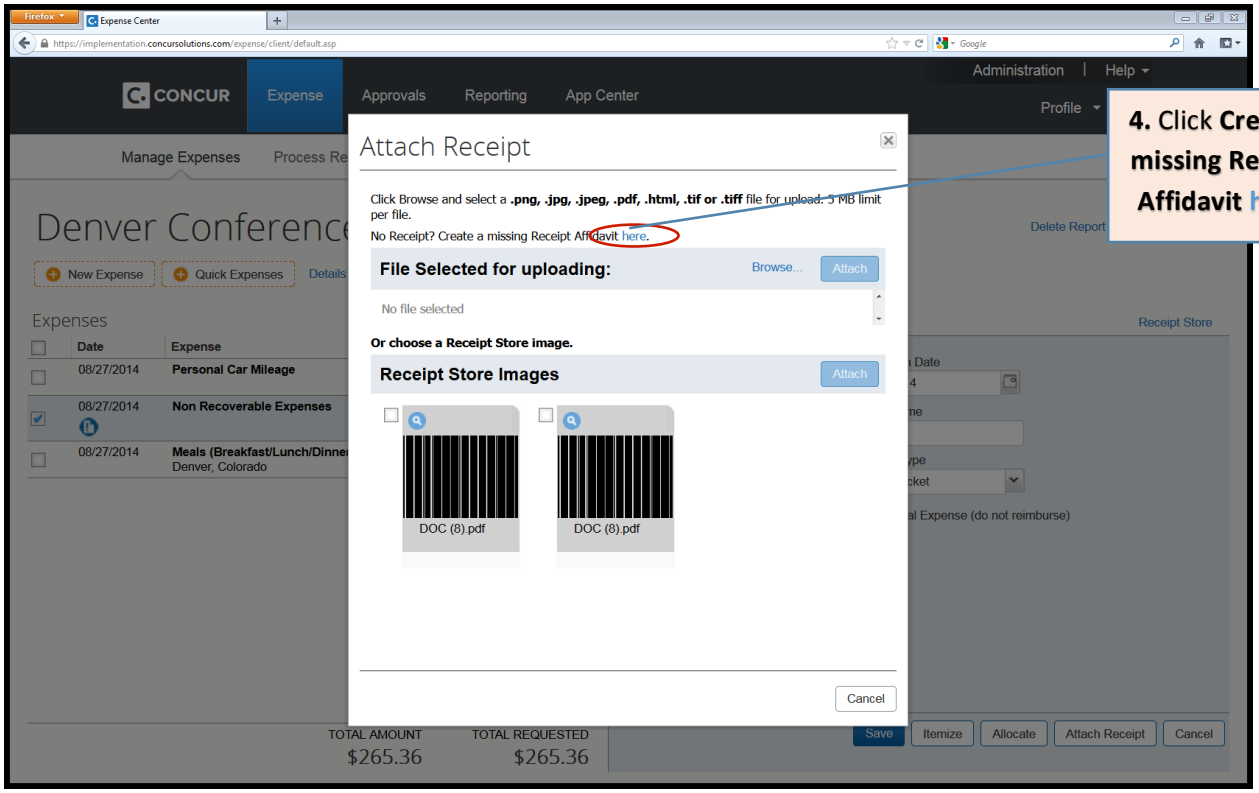
In the event that a receipt is required but is not available and a reprint cannot be obtained from the vendor, a Missing Receipt Affidavit can be created in place of a receipt to confirm that the expense is a valid business expense.

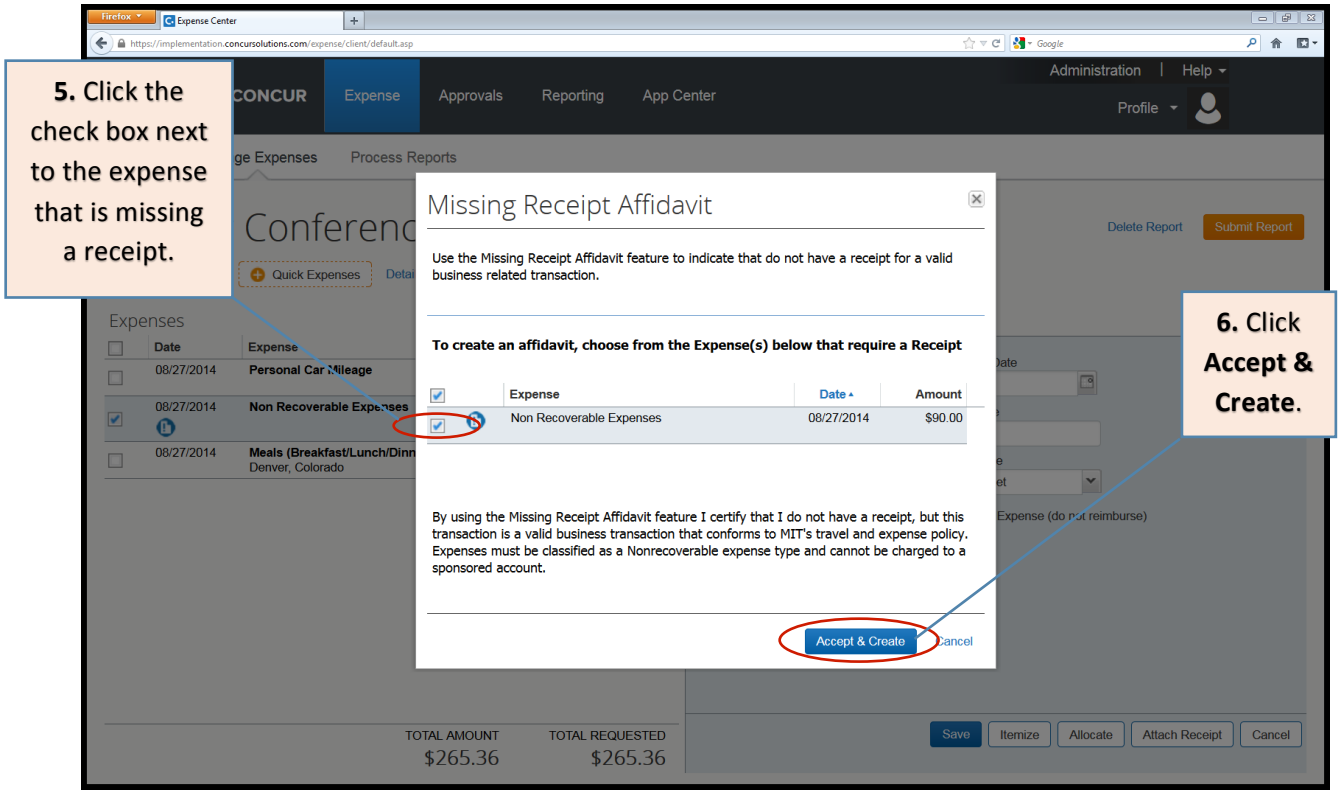
Please note that the Missing Receipt Affidavit is a last resort when no receipt can be obtained and should only be used after attempts are made to recover a receipt. The expense needs to be classified as "non recoverable expenses" and allocated to a non-sponsored account.

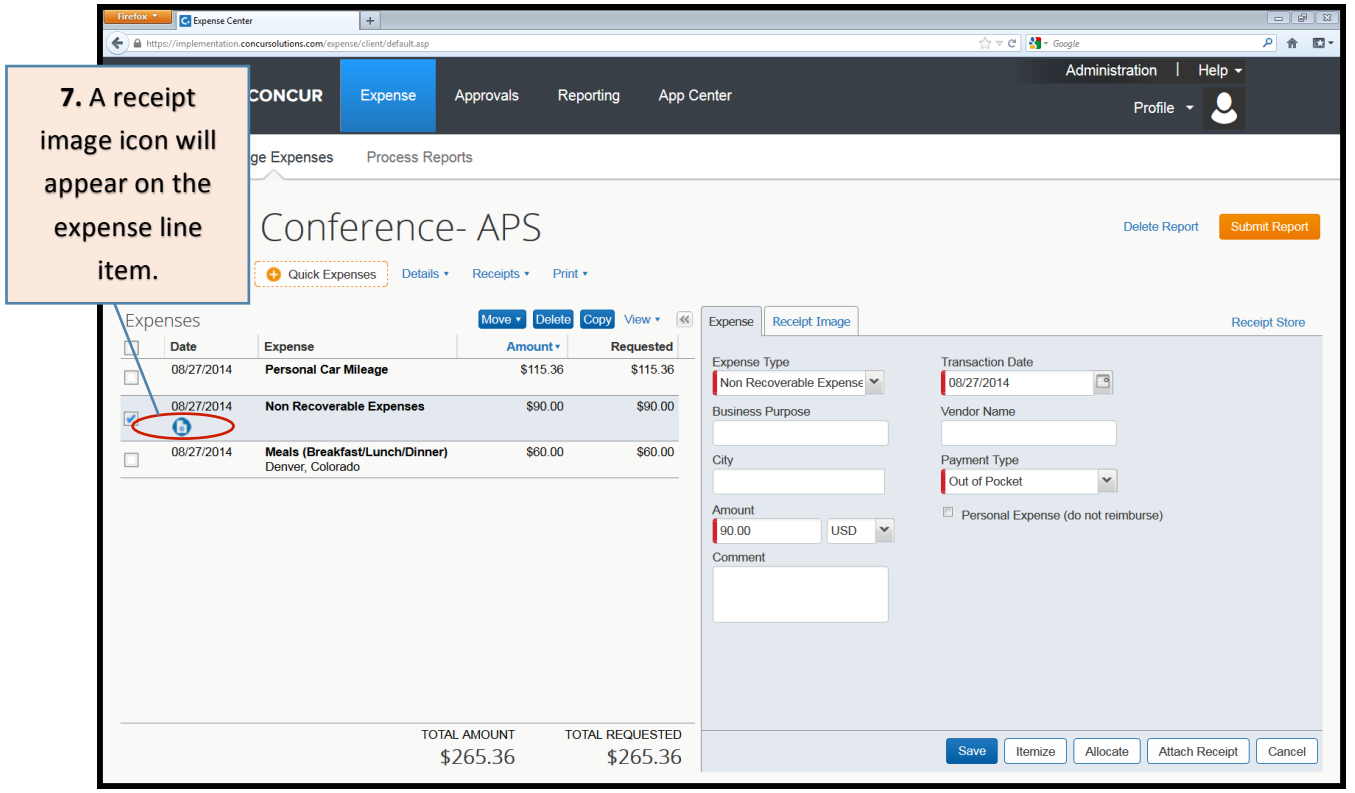
To create a Missing Receipt Affidavit, click into the expense line item that is missing a receipt to bring up the expense detail window and follow the steps below.



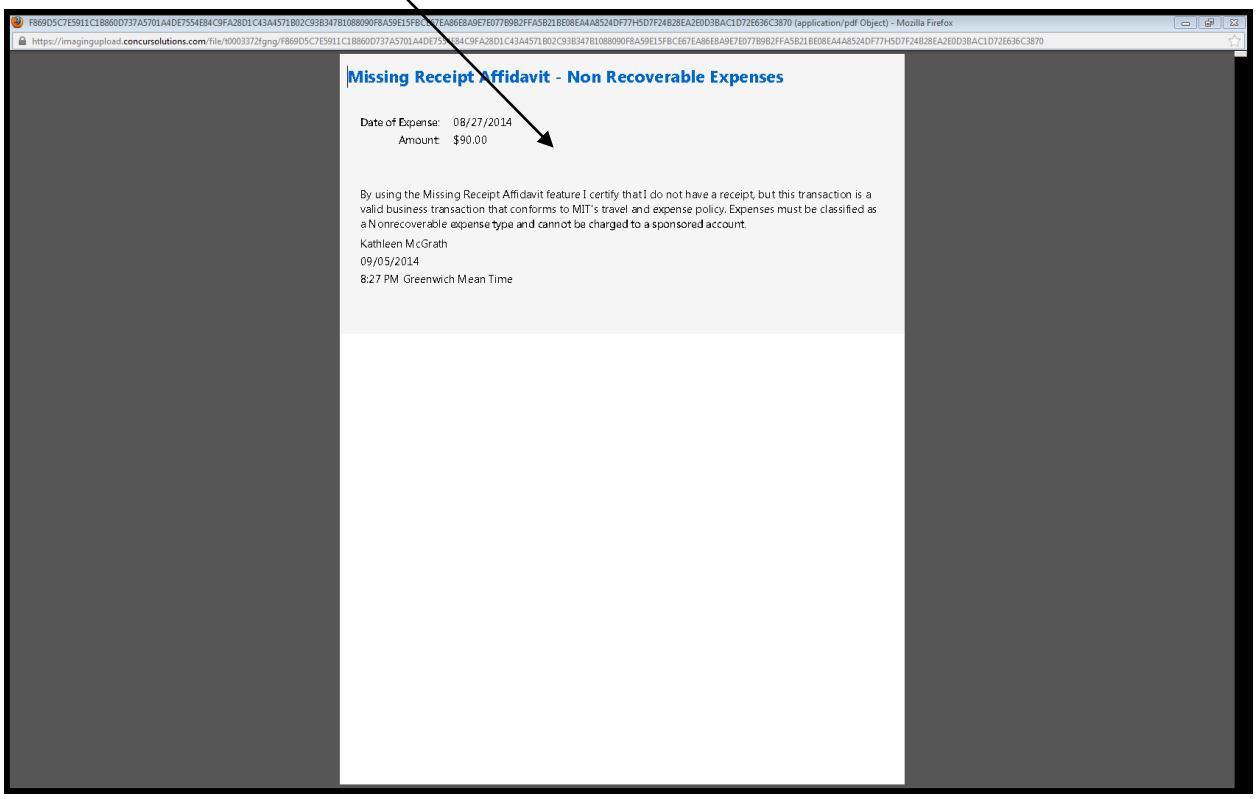

Expense Center
https://implementation.concursolutions.com/expense/client/default.asp
CONCUR
Expense
Approvals
Reporting
App Center
Administration
Help
Profile
Manage Expenses
Process Reports
Denver Conference- APS
Delete Report
Submit Report
New Expense
Quick Expenses
Details
Receipts
Print
Expenses
Move
Delete
Copy
View
Date
Expense
Amount
Requested
08/27/2014
Personal Car Mileage
$115.36
$115.36
08/27/2014
Non Recoverable Expenses
$90.00
$90.00
08/27/2014
Meals (Breakfast/Lunch/Dinner)
Denver, Colorado
$60.00
$60.00
Expense
Receipt Image
Receipt Store
Expense Type
Non Recoverable Expense
Transaction Date
08/27/2014
Business Purpose
Vendor Name
City
Payment Type
Out of Pocket
Amount
90.00
USD
Personal Expense (do not reimburse)
Comment
TOTAL AMOUNT
$265.36
TOTAL REQUESTED
$265.36
Save
Itemize
Allocate
Attach Receipt
Cancel
3. Click Attach Receipt.


Attach Receipt
Click Browse and select a .png, .jpg, .jpeg, .pdf, .html, .tif or .tiff file for upload. 5 MB limit per file.
No Receipt? Create a missing Receipt Affidavit here.
File Selected for uploading:
Browse...
Attach
No file selected
Or choose a Receipt Store image.
Receipt Store Images
Attach
DOC (8).pdf
DOC (8).pdf
Cancel
4. Click Create a missing Receipt Affidavit here.


5. Click the check box next to the expense that is missing a receipt.
Missing Receipt Affidavit
Use the Missing Receipt Affidavit feature to indicate that do not have a receipt for a valid business related transaction.
To create an affidavit, choose from the Expense(s) below that require a Receipt
Expense
Date
Amount
Non Recoverable Expenses
08/27/2014
$90.00
By using the Missing Receipt Affidavit feature I certify that I do not have a receipt, but this transaction is a valid business transaction that conforms to MIT's travel and expense policy. Expenses must be classified as a Nonrecoverable expense type and cannot be charged to a sponsored account.
Accept & Create
Cancel
6. Click Accept & Create.


7. A receipt image icon will appear on the expense line item.
Conference- APS
Delete Report
Submit Report
Quick Expenses
Details
Receipts
Print
Expenses
Move
Delete
Copy
View
Date
Expense
Amount
Requested
08/27/2014
Personal Car Mileage
$115.36
$115.36
08/27/2014
Non Recoverable Expenses
$90.00
$90.00
08/27/2014
Meals (Breakfast/Lunch/Dinner)
Denver, Colorado
$60.00
$60.00
TOTAL AMOUNT
$265.36
TOTAL REQUESTED
$265.36
Expense
Receipt Image
Receipt Store
Expense Type
Non Recoverable Expense
Transaction Date
08/27/2014
Business Purpose
Vendor Name
City
Payment Type
Out of Pocket
Amount
90.00
USD
Personal Expense (do not reimburse)
Comment
Save
Itemize
Allocate
Attach Receipt
Cancel

8. Hover over the receipt image icon or click **Receipts>View receipts in new window** to view the Missing Receipt Affidavit you've created.



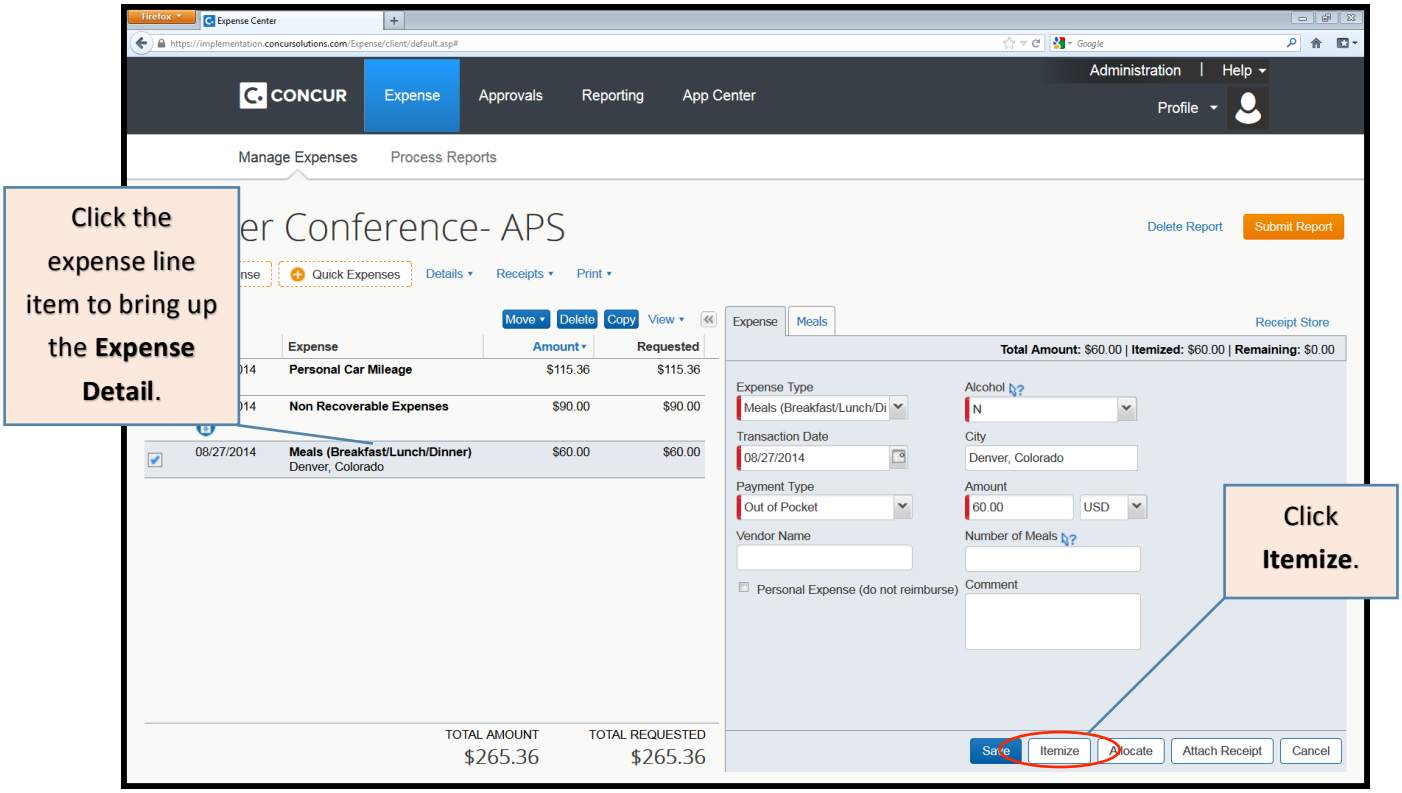
Please make sure that the expense is being charged to a non-sponsored cost object. If you entered a sponsored cost object into the report header then you will need to allocate the expense that is missing a receipt to a non-sponsored cost object (see allocation quick card for allocation instructions).

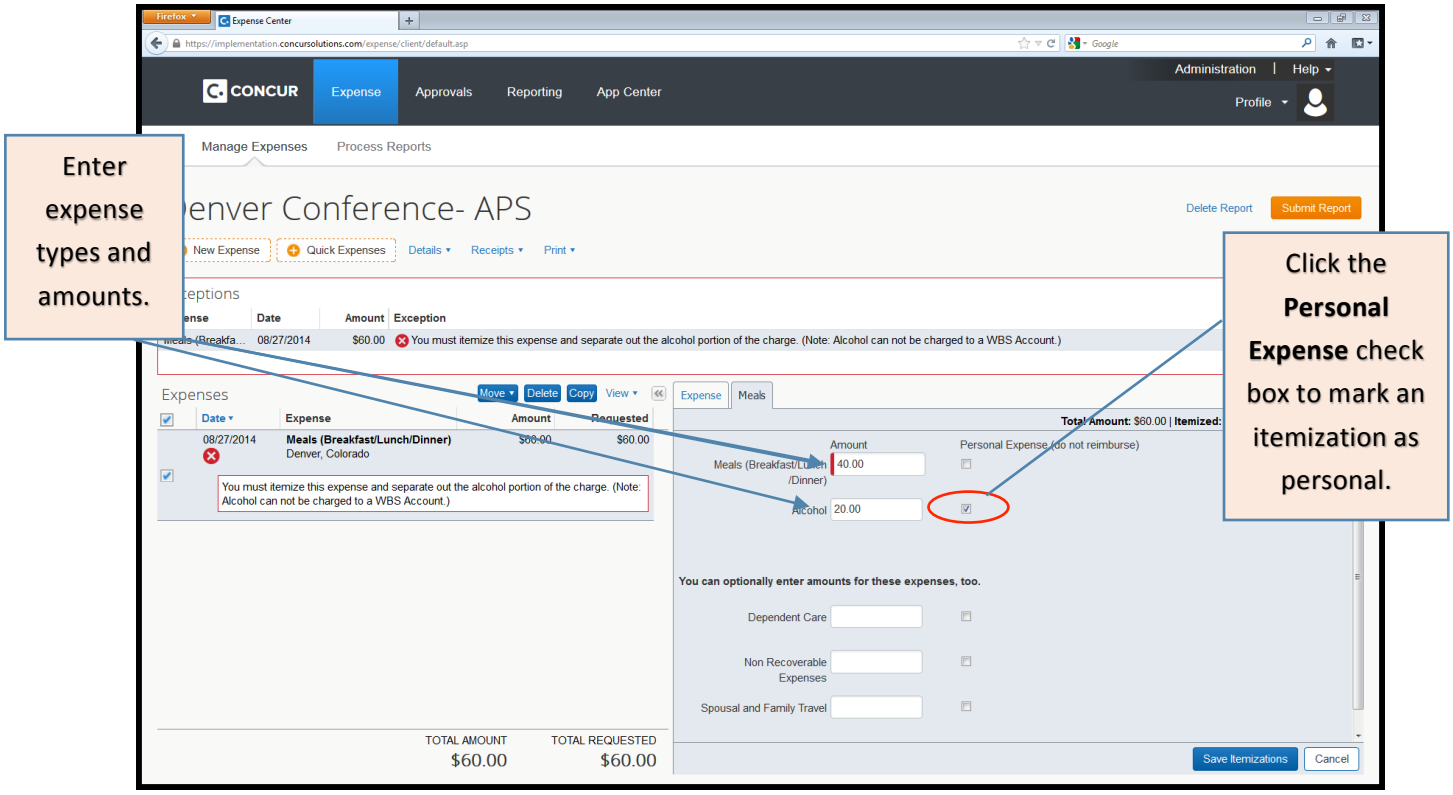
How to Mark an Itemization as Personal

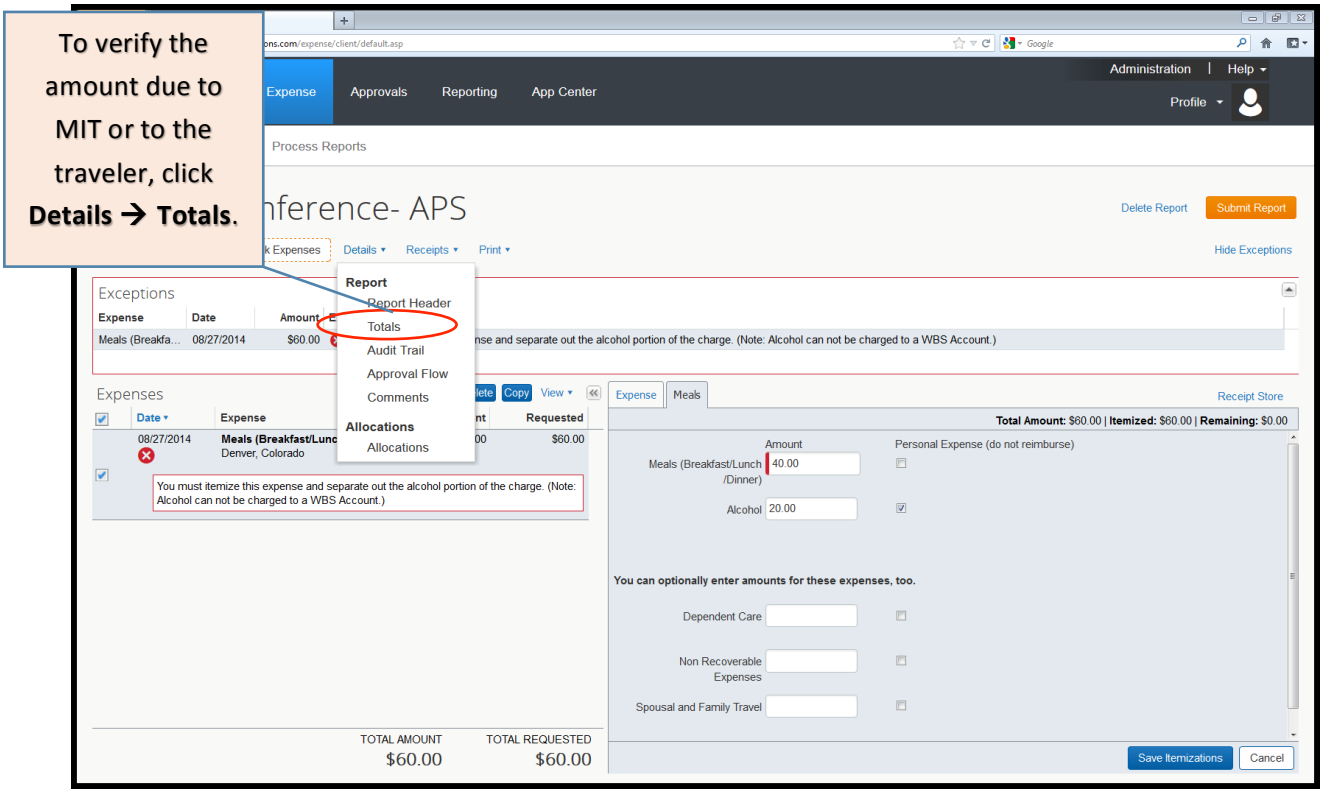
When the MIT Travel Card is used for a non-reimbursable expense, that amount needs to be itemized as personal. If the personal expense amount is greater than the out-of-pocket amount, the traveler will need to reimburse MIT.

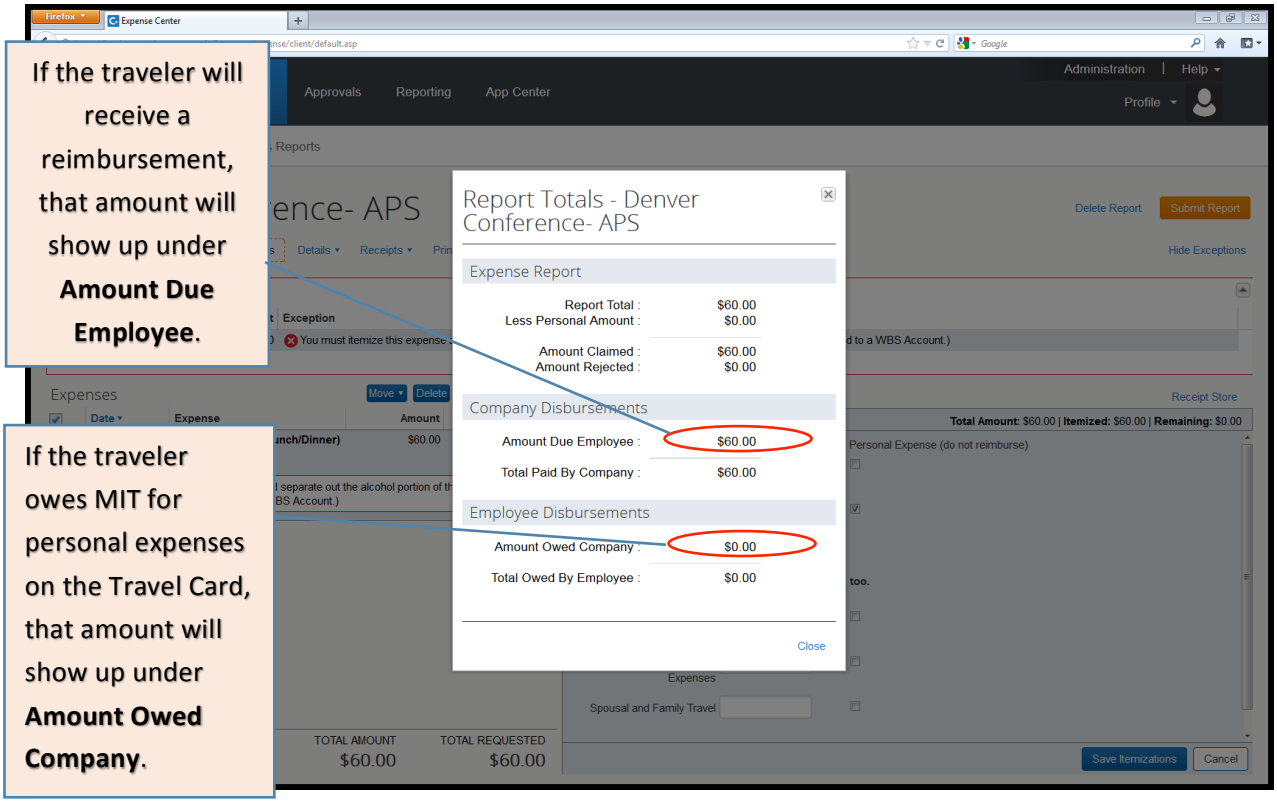
Marking an itemization as personal will subtract that amount from the total claimed. Concur will net any personal amount against the out-of-pocket total for the report. If the itemization marked personal is within a Travel Card charge, and the personal expense total is greater than the traveler's out-of-pocket expenses, then the traveler will owe MIT. If the personal expense total is less than the out-of-pocket expense amount, the traveler will not owe anything (but the personal amount will be subtracted from their reimbursement).

Instructions for itemizing a portion of an expense as personal:




Enter expense types and amounts.
Click the **Personal Expense** check box to mark an itemization as personal.
CONCUR
Expense
Approvals
Reporting
App Center
Administration
Help
Profile
Manage Expenses
Process Reports
Delete Report
Submit Report
New Expense
Quick Expenses
Details
Receipts
Print
Exceptions
Date
Amount
Exception
08/27/2014
$60.00
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
Date
Expense
Amount
Requested
08/27/2014
Meals (Breakfast/Lunch/Dinner)
Denver, Colorado
$60.00
$60.00
You must itemize this expense and separate out the alcohol portion of the charge. (Note: Alcohol can not be charged to a WBS Account.)
Total Amount: $60.00 | Itemized:
Amount
Personal Expense (do not reimburse)
Meals (Breakfast/Lunch /Dinner)
40.00
Alcohol
20.00
You can optionally enter amounts for these expenses, too.
Dependent Care
Non Recoverable Expenses
Spousal and Family Travel
TOTAL AMOUNT
$60.00
TOTAL REQUESTED
$60.00
Save Itemizations
Cancel


To verify the amount due to MIT or to the traveler, click **Details → Totals**.
Report
Report Header
Totals
Audit Trail
Approval Flow
Comments
Allocations
Allocations
Hide Exceptions
Receipt Store
Total Amount: $60.00 | Itemized: $60.00 | Remaining: $0.00



If an amount shows up under **Amount Owed Company,** the traveler will need to write a check to MIT for that amount. Please obtain a check payable to MIT for the amount due, print out the MIT Detailed Report (under print/email), clip the check to the printout and mail to VPF Travel Services, NE49-4037.

Also add a comment (**Details → Comments**) confirming that the check is being mailed to VPF Travel Services before submitting the report.

*Note: If an entire Travel Card charge should be marked as personal, simply click into the expense to bring up the expense detail, then click the **Personal** check box within the expense detail and click **Save**.*

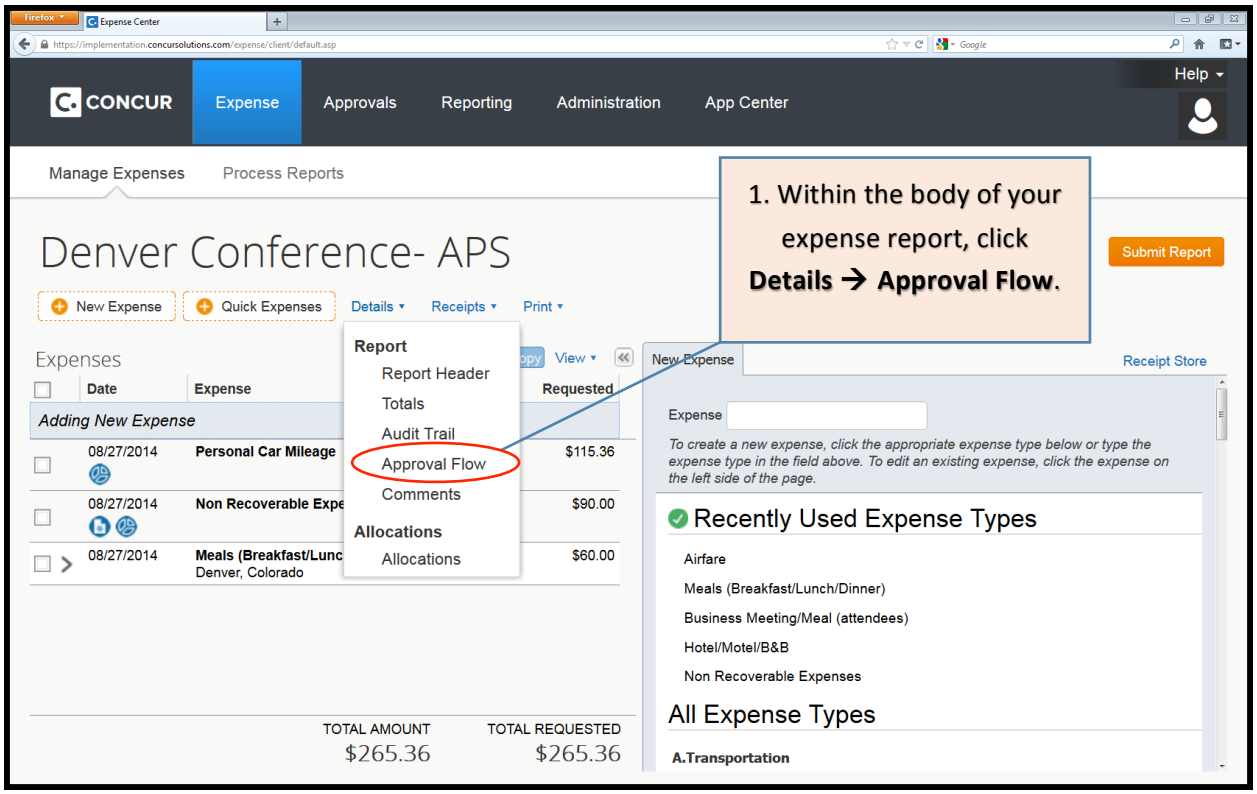
How to Manually Add an Additional Approver to Workflow

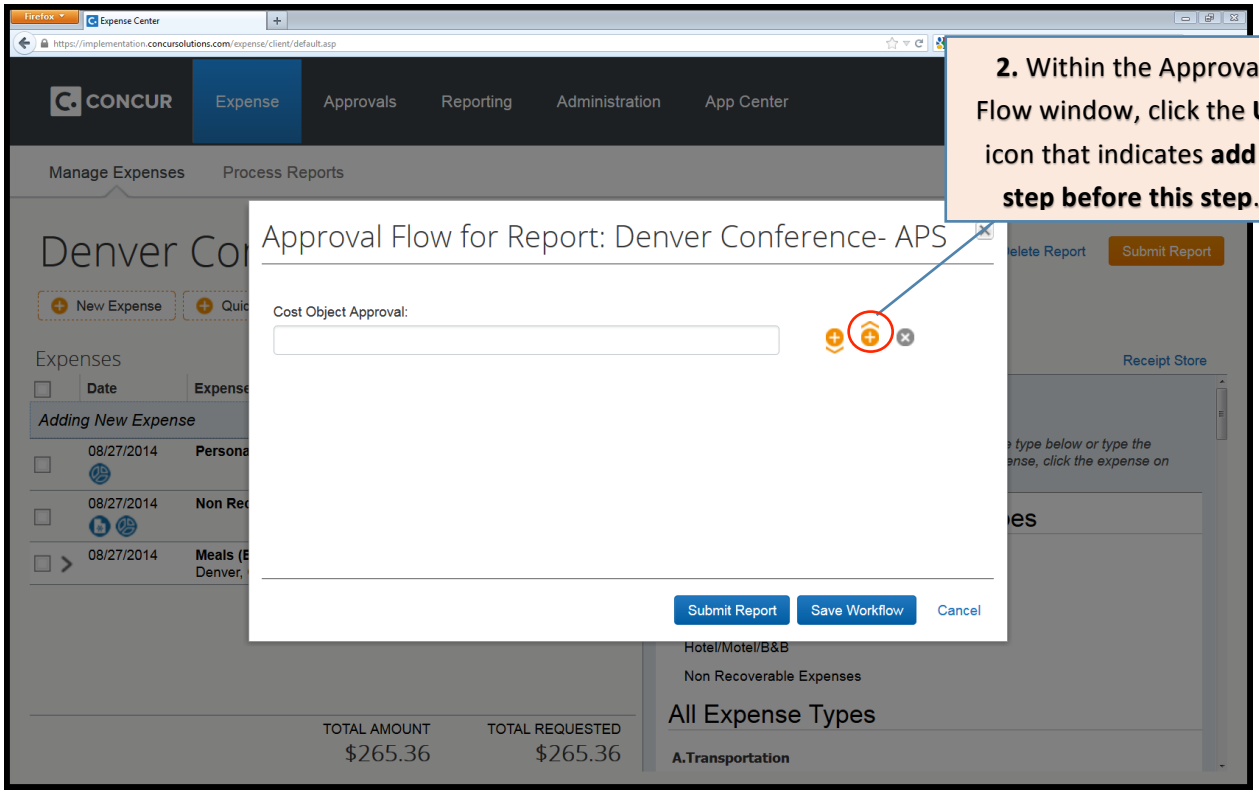
When a Concur report is submitted it will automatically route to the approver(s) for the cost object(s) used. However, there are a few scenarios where you will need to manually add an additional approver.

Scenarios for Additional Approver:

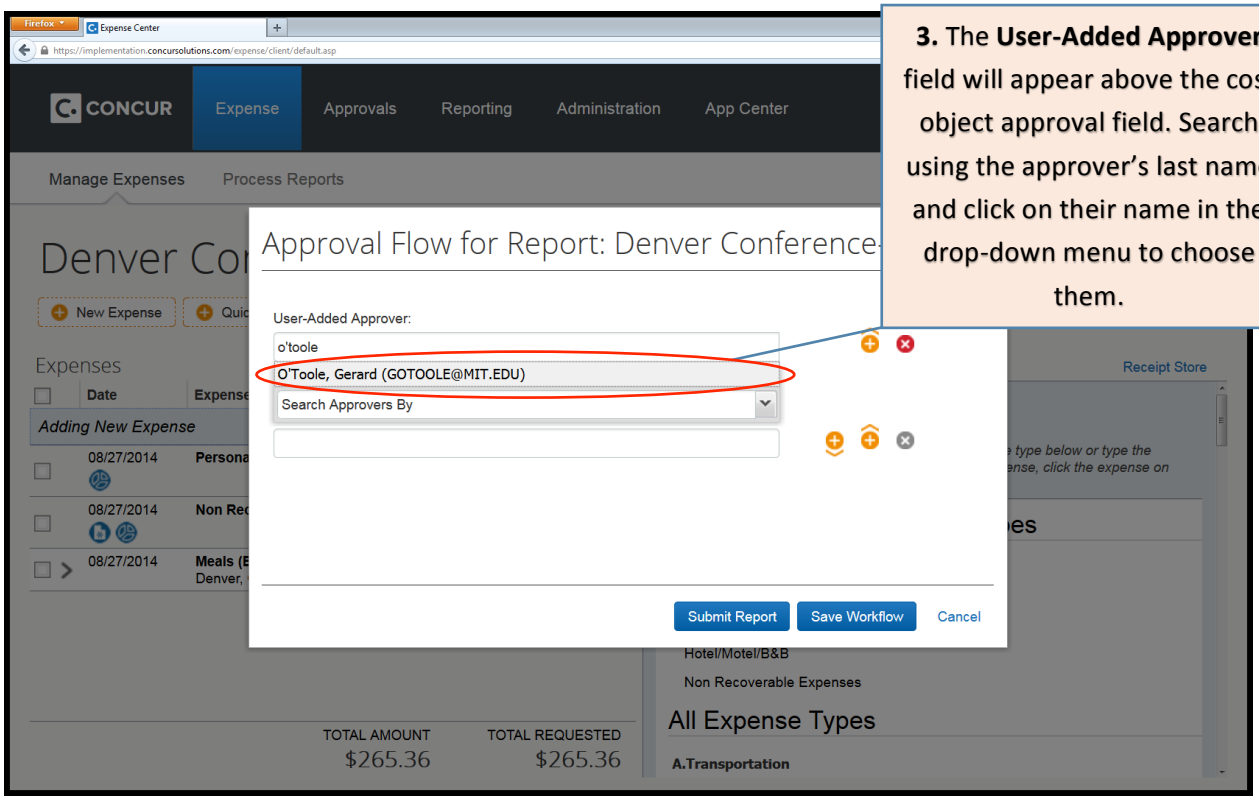
- If you happen to be the cost object approver as well as the traveler on a given report. You will need a second person in your area to review your expenses.
- If you are in a department that requires an additional approver as part of their workflow process.
- If your department or the VPF Travel office has requested that you add a second approver for any audit/ workflow reason.

If you need to manually add an approver for any of these reasons, follow these four steps:



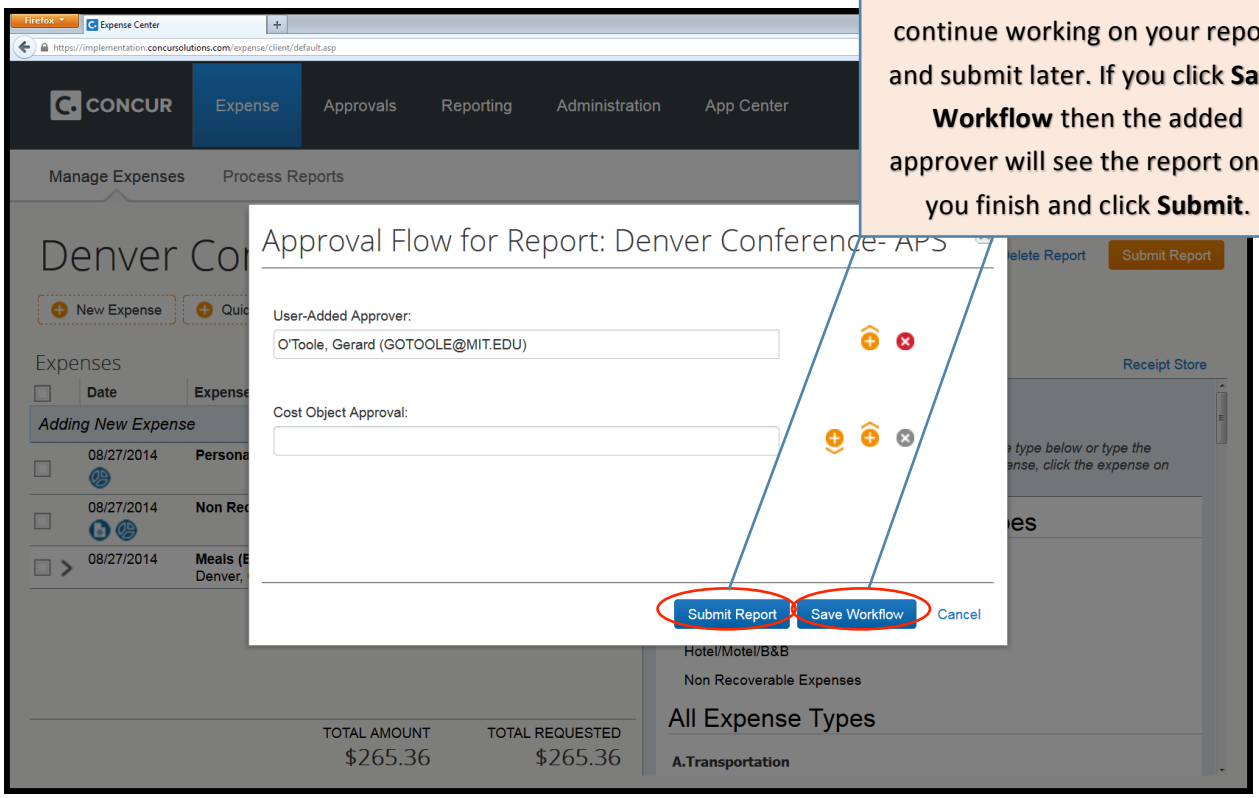


2. Within the Approval Flow window, click the **UP** icon that indicates **add a step before this step**.



3. The **User-Added Approver** field will appear above the cost object approval field. Search using the approver's last name and click on their name in the drop-down menu to choose them.

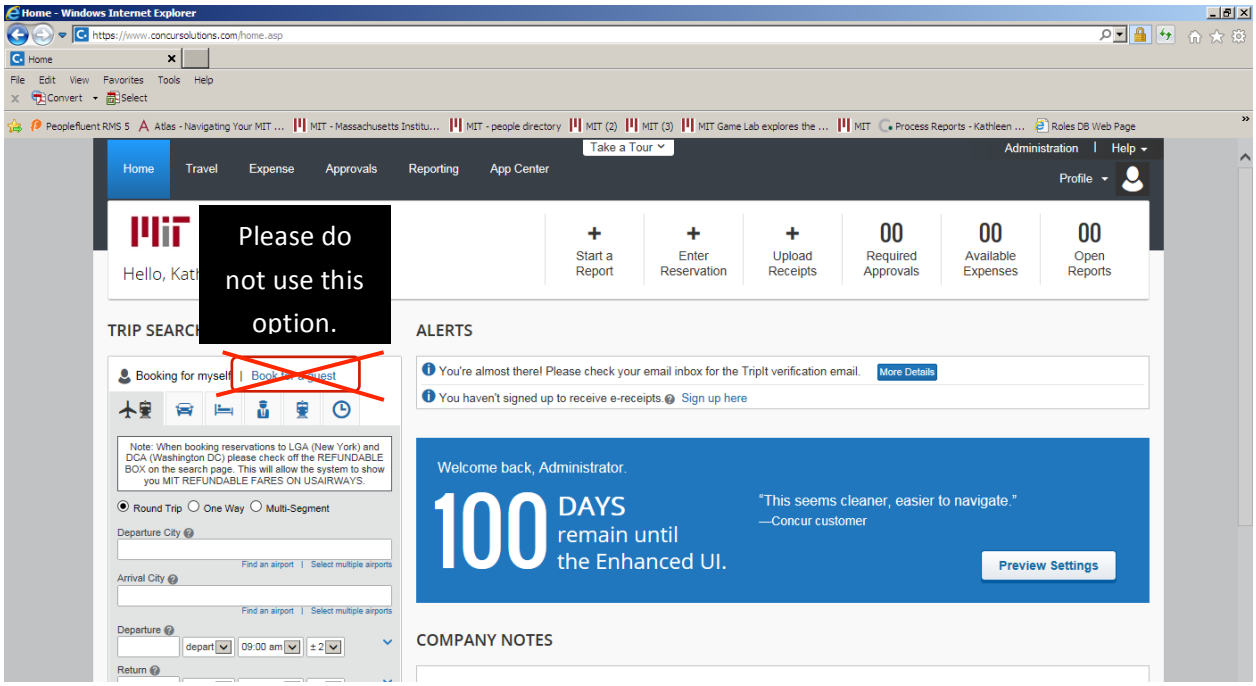
4. You can then either click **Submit Report** to submit the report now or click **Save Workflow** to continue working on your report and submit later. If you click **Save Workflow** then the added approver will see the report once you finish and click **Submit**.



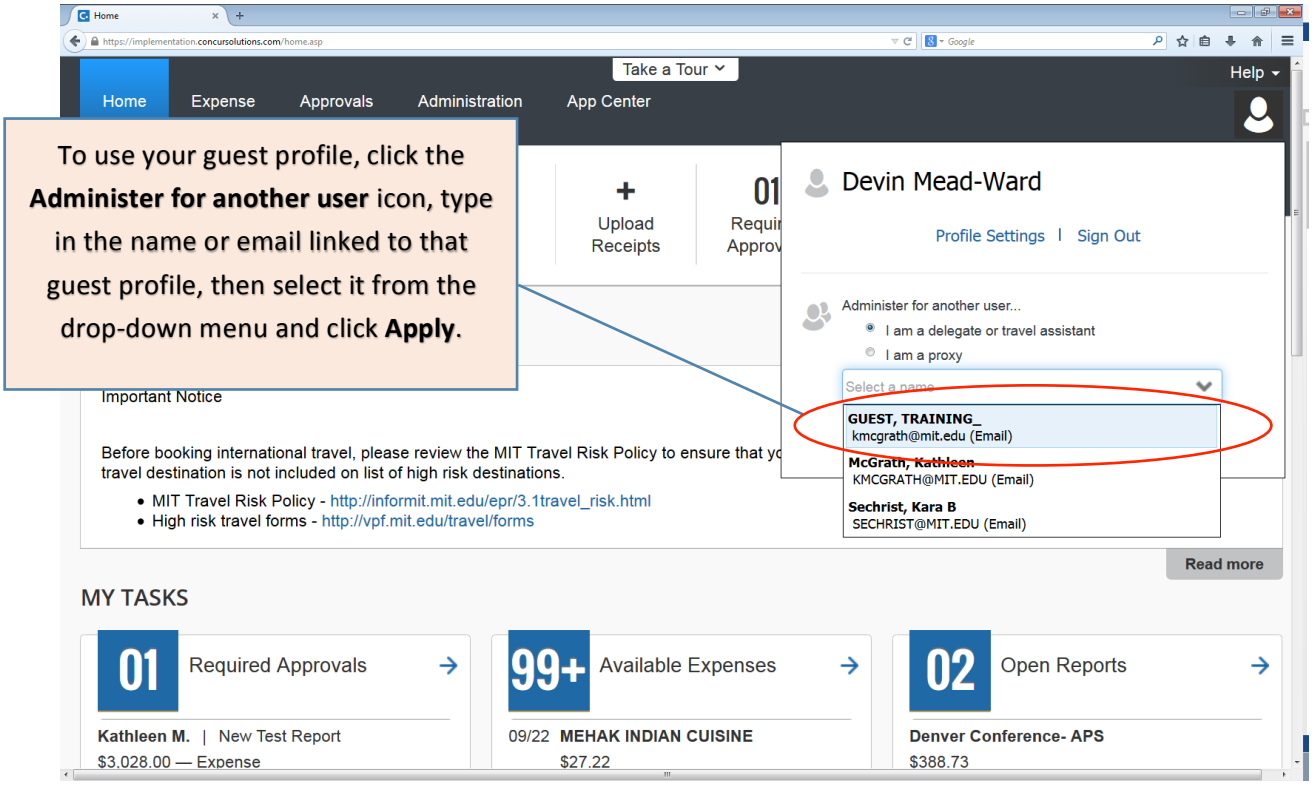
How to Create a Report Using a Guest Profile

Within Concur, you can use a guest profile to reimburse non-MIT visitors, anyone who is not set up in the HR/Payroll system, or anyone you need to, with a paper check. The guest profile is also where you will go to expense your department card charges if you have a department travel card.

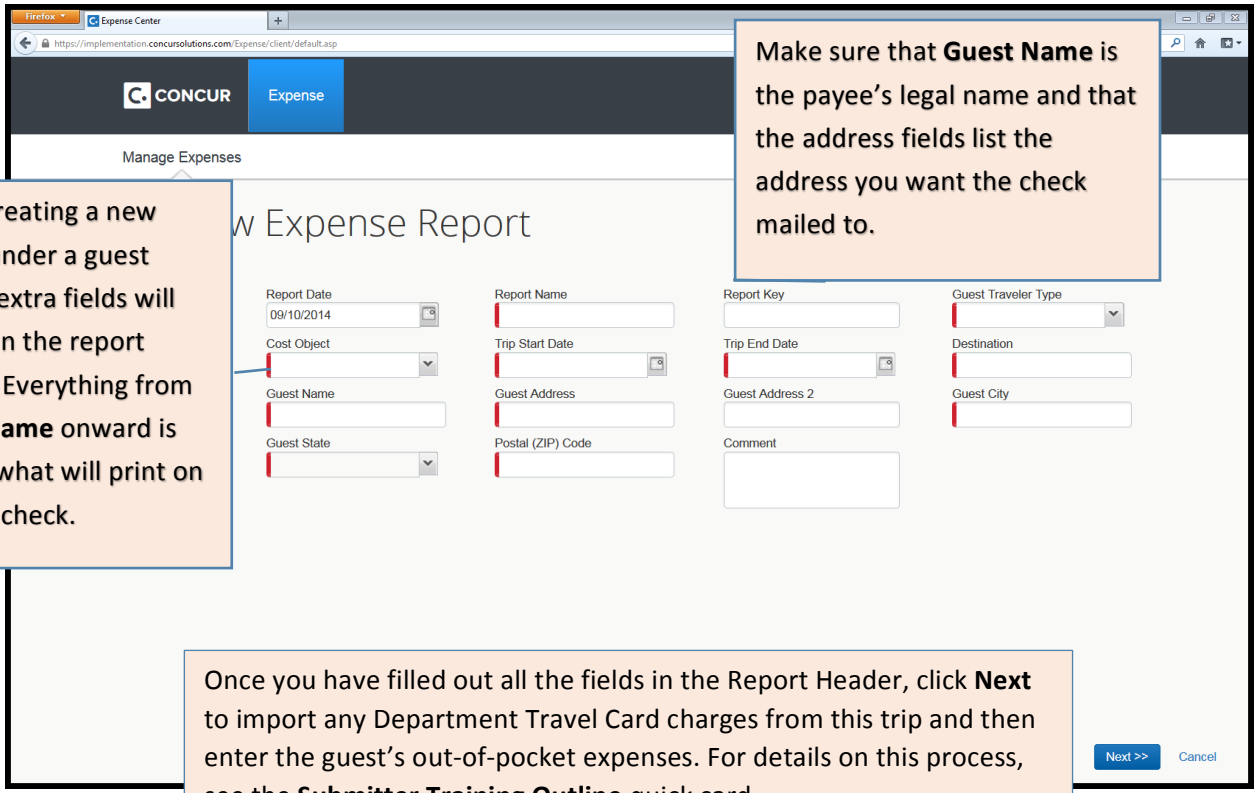
On the Concur home page, in the **Trip Search** window, make sure that you never use the **Book for a Guest** option. If you do this, you won't be able to reimburse that guest for any out-of-pocket expenses because expenses submitted under your own profile will reimburse you.



If you apply for a Department Travel Card, a guest profile will be set up for you as part of that process. If you don't have a Department Travel Card but need to reimburse non-MIT visitors, you can request a guest profile by emailing travelsupport@mit.edu.



Once you are in your guest profile, click **Expense → New Expense Report**. This will bring you to the report header.



Once you have filled out all the fields in the Report Header, click **Next** to import any Department Travel Card charges from this trip and then enter the guest's out-of-pocket expenses. For details on this process, see the **Submitter Training Outline** quick card.