

M2 BLUE – COST CLAIM GUIDE

M2 Blue is Aalto University’s travel expense system for all travel claims and cost claims that are non-taxable. You can use it to get the reimbursement from Aalto University related to your studies, e.g. to claim costs from the printing costs of your dissertation.

Note! If you have drafted cost claims in M2 before, you can try to log into <https://www.saasm2.com/blue/Login/Haka/> with your Aalto ID & password.

If you are unable to log in, please follow the steps below.

1. Create a profile

First fill in a Sharepoint form to create yourself a profile in M2: <https://sharepoint.aalto.fi/sites/Workflow/Students/Lists/Payment%20Profile/NewForm.aspx>

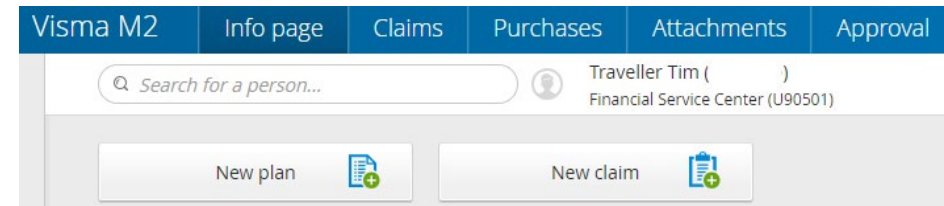
The form is two part. In the first (1) part you are asked to accept the terms and conditions and fill in info on home country and bank details. **All details are mandatory due to Finnish taxations and bookkeeping rules.**

Click "Save" after which the system checks your info and you should receive within few minutes an email with a link – through which you get to the second part AND can check your info and alter it if needed.

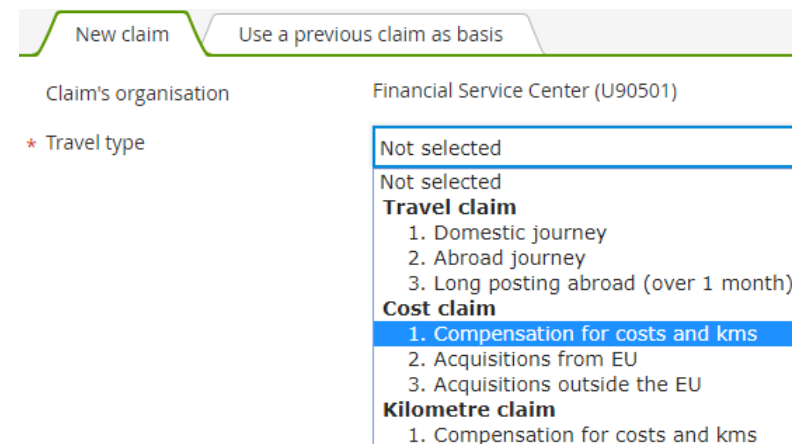
In the second (2) part you will be asked to fill in additional info (all first names, address, etc.) Please fill in and click "save" again. After this it takes an hour for the system to create an M2 profile for you. Then you may sign in to M2 <https://www.saasm2.com/blue/Login/Haka/> and fill in the cost claim there.

Creating a cost claim

Choose "New claim" on the front page for creating a new claim.



Choose cost claim from the drop-down menu. When creating a cost claim, remember to take the country of purchase into account (e.g. if you used the printing house in Finland, choose no. 1.).



Fill in the Claim description, e.g. Doctoral dissertation printing costs.

When you have filled in the information, choose "Continue".

Next the purchases and the attachments regarding the claim will be allocated, and the information for the purchases is checked. Click Add (see picture below).

Fill in Date, Cost type: **Printing and binding services (24%)**, Means of payment: **CASH**, Currency amount, Description: **Printing doctoral dissertation**, Type of cost (see the following picture). Click save.


Attach invoices and receipts to all expenses when creating a cost claim (e.g. the copy of the original invoice as a PDF-document).

Add a new attachment:

2. Posting

Posting makes sure that the costs are allocated to the right cost centres and projects.

On the Posting tab you can check the default posting of the cost claim, which comes automatically from your background information.

If needed, you can change the default posting for the individual costs by clicking  button.

Default posting

100,00%

Project

On the Confirm tab you can send the claim to Aalto's travel services team for auditing. The Approver-field will automatically appear as "Asiatarkastettavaksi / Send to approval", you don't need to change this.

If you want to, you can write the name of the final approver to the message field, to help the travel services team.

3. Confirm

Approver

Asiatarkastettavaksi / Send to approval (1)



Message

Approver Ann

Save as default approver

Send for approval

Additional information

Visma M2 Info page Claims Purchases Attachments

In the top menu's Info page you can see announcements, incomplete claims, unallocated advances as well as claims that are in approval.

On the Claims tab you can see the status of all your claims.

On the Purchases tab you can see all allocated or unallocated purchases.

You can use the filter menu to show or hide information according to your liking.

[Advanced search](#)

Purchase date	Means of payment	Type	Member firm
21.04.2018	Eurocard university-invoiced	<input checked="" type="checkbox"/> Unallocated <input type="checkbox"/> Allocated <input type="checkbox"/> Processed as advance	

Advanced search offers more search options.

Advanced search

[Hide advanced search](#)

Purchase date: -

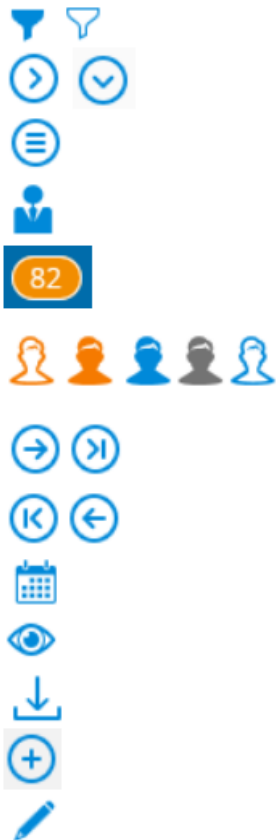
Travel date: -

ATM withdrawals:

On the Attachments tab you can see all allocated or unallocated attachments.

General functions

Task



Description

- Filtering done/not done
- Show details/Hide details
- Select a task
- Select the person logged in
- Number of claims to be approved
- Employee type and employment validity
- Next/Last
- First/Previous
- Calendar selection
- View attachment
- Download attachment
- Add
- Edit information

Task



Description

- Clear row
- Add split (cost type/posting)
- Open search function
- Open selection list
- Print
- Comments
- Approval chain
- Selection made/not made
- Side-step approval/rejection
- Number of attachments/costs paid by the traveller
- Notice to user (see text for details)