Overview

- Concur automatically loads your Harvard Corporate Card transactions into the system for inclusion on expense reports.
- Transactions are loaded into Concur every night, and will appear in your Available Expenses list, usually within 2 – 4 days of the transaction. International transactions may take longer to appear.

Adding Corporate Card Transactions to Expense Reports

Step 1: Locating Available Corporate Card Transactions

Credit card transactions appear in a few places in Concur:

- On the Concur Home screen under Available Expenses
- On the Expense page, under Active Reports and above Available Receipts
• Within an expense report, a list of Corporate Card transactions will appear on the right side of the screen under the heading Available Expenses.

Note: If the Available Expenses list does not automatically appear on the right side of the screen within an expense report, click the Import Expenses link, and any Corporate Card transactions that are not associated with an expense report will appear in the list.

Step 2: Add the Transaction(s) to a Report
To add Corporate Card expenses to a report:
1. On the Available Expenses list, select the checkbox next to the item (or items) you want to add to the report.

2. Click Move.
   NOTE: Alternatively, you can add items to the report by clicking the desired items and dragging them to the left side of the screen.
3. The item(s) are added to the report and moved to the left side of the screen.
Step 3: Resolve Exceptions
In Concur, there are two types of exceptions that can appear when creating an expense report:

- **Yellow icons**: A warning message regarding a specific expense. The system will still permit you to submit the report, but you should review all yellow exceptions and determine whether you should make changes to the report prior to submission. For example, you might choose to add a comment on any expense line item with a yellow icon.

- **Red icons**: Indicates the expense has an issue that must be resolved before the report can be successfully submitted. Typically, this is either missing or invalid data in a field, or the expense does not comply with university business rules or policies.

To resolve expense exceptions:
1. For each exception, click the row for the transaction, and fix any missing/incorrect information.

   Example: This transaction came over with an exception because the expense type was listed as “Undefined.”

2. Make the necessary changes to the transaction according to the message accompanying the exception.

   **Note**: If you need to select a new Expense Type, the fields on the Expense tab may change based on the expense type you choose.

3. Complete all required fields (indicated by the red border on the left).

4. Click **Save**.

5. Repeat process until all Exceptions on the report have been resolved.

Tip: For each Corporate Card transaction you add to a report, it is a good idea to verify that the expense type is correct for the specific transaction.

Example: The system might incorrectly assign a meal at a restaurant that is located within in a hotel as a hotel stay, due to the similarity in vendor name. The correct expense type might actually be “Individual Meal” or “Business Meal with Attendees,” and you would need to select the appropriate expense type, and then complete any required fields related to the meal.

IMPORTANT: All transactions made using the Corporate Card must be put on an expense report. This includes personal or non-reimbursable items such as a movie rental or personal purchases made in a gift shop and charged to your hotel room. When adding personal expenses, remember to select the Personal checkbox to ensure they are not reimbursed.
Resources

**Quick Reference Guides and Online Tutorials**
Quick Reference Guides provide step-by-step instructions on a number of common tasks in Concur, and online tutorials present a video walk-through of how to perform various tasks and procedures within the system. Both the Guides and online tutorials are available at: [travel.harvard.edu/concur-training](http://travel.harvard.edu/concur-training)

**Concur Support**
24 hour support is available through the Concur Support Desk at 866-793-4040. You can also access the Concur Support Portal within the system by clicking the Help menu, and then selecting Contact Support.