

## Overview

Your profile is where Concur stores your personal information for use when creating expense reports and processing reimbursements. It also includes options and settings to make the tool even easier to use, such as registering your account for the mobile Concur app, enabling you to perform many expense tasks using your smartphone.

This Guide provides instructions on setting up your Concur profile, including:

- Logging into Concur and confirming your personal information
- Verifying your email address to submit receipts directly to Concur
- Adding your personal banking information for reimbursements
- Registering your account for the Concur mobile apps
- Assigning your default expense approver
- Selecting your default account codes for expense reports

## Log into Concur

1. Log into Concur:
  - a. Go to: <http://travel.harvard.edu/concur>
  - b. Click the link titled **Click to Access Concur**.

Alternate Login:

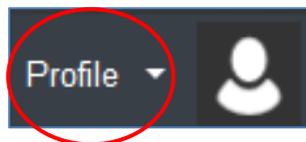
- a. Go to <http://fss.finance.harvard.edu/applications>
  - b. Click the **Concur** link.
2. Your HarvardKey authentication page will appear. Login.
  3. Concur Travel and Expense will automatically load.

## Confirm Personal Information

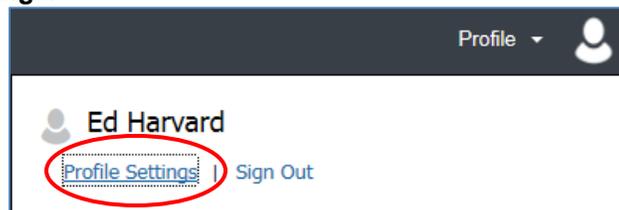
After logging in to Concur with your HarvardKey, the Concur Home Page appears.

To access your Concur Profile:

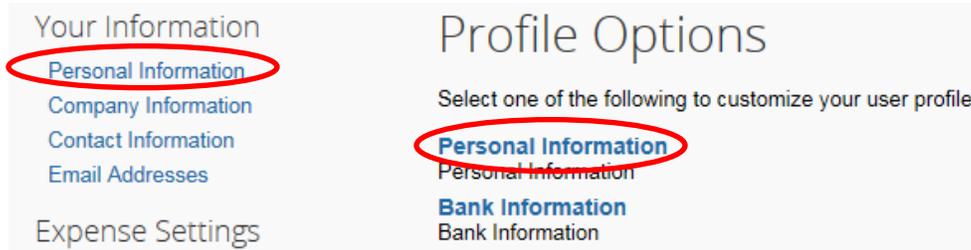
1. Click the **Profile** button at the top right of the window.



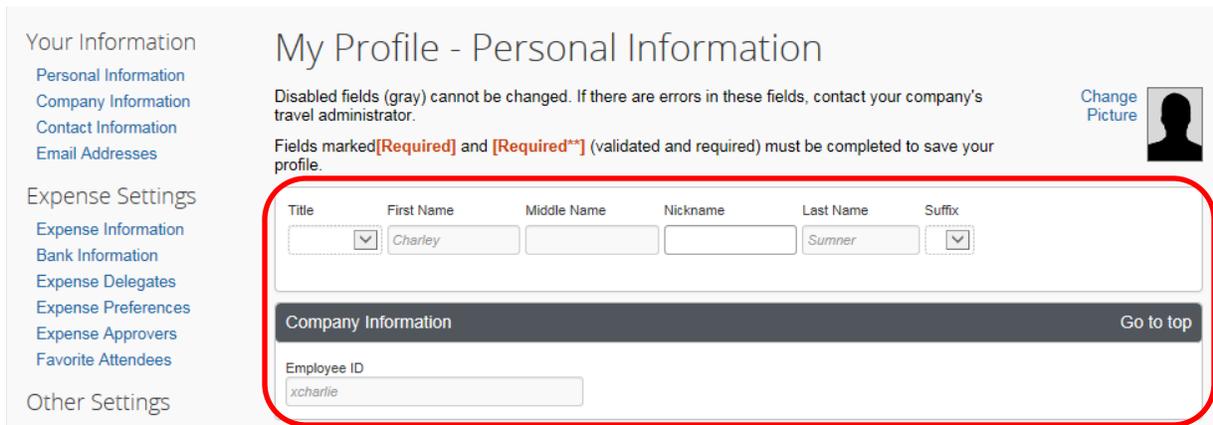
2. Click **Profile Settings**.



- On the Profile Options page, click **Personal Information**.



- At the top of the Personal Information page, you can confirm whether your name and employee ID are correctly displayed.
  - If they are not correct, contact your HR representative to have it changed.

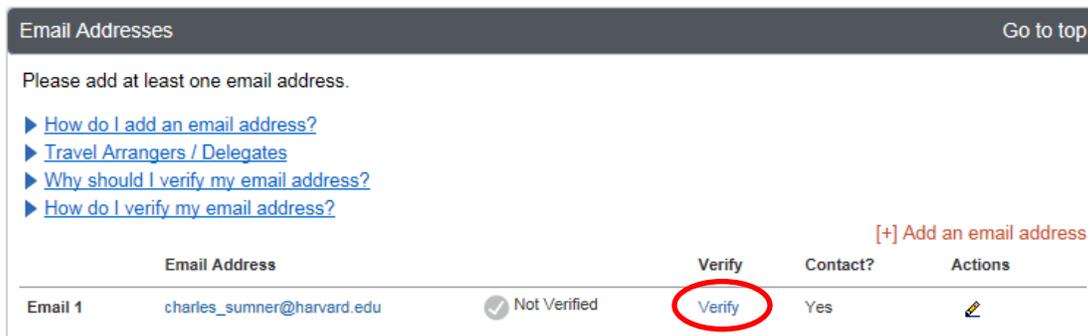


## Verify Email Address

Concur enables you to send expense receipts directly to the system via email. To take advantage of this function, you must verify the email address you will use to send your receipts. Once the address is verified, you can use that email account to send receipts by emailing them to [receipts@concur.com](mailto:receipts@concur.com), and they will be available for you to add to your expense reports.

To verify your email address:

- Scroll down the page to the **Email Addresses** section, or click the **Email Addresses** link on the left side of the page.
- Click the **Verify** link next to your email address.



- The system sends a Verification Code to your email address and displays a confirmation message. Click **OK** to return to the page.

- Copy the Verification Code from the email you received, and paste it into the **Enter Code** field.

Email Addresses Go to top

Please add at least one email address.

- [How do I add an email address?](#)
- [Travel Arrangers / Delegates](#)
- [Why should I verify my email address?](#)
- [How do I verify my email address?](#)

[\[+\] Add an email address](#)

Email Address	Verify	Contact?	Actions
Email 1 charles_sumner@harvard.edu	Check email for code <a href="#">Resend</a>   <a href="#">Cancel</a>	Yes	

Enter Code

- Click **OK**.
- A confirmation message appears. Click **OK** to close the message.
- Click **Save**.

Email Addresses Go to top

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[\[+\] Add an email address](#)

Email Address	Verify	Contact?	Actions
Email 1 charles_sumner@harvard.edu	Verified <a href="#">Disable Verification</a>	Yes	

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International Travel: Passports and Visas Go to top

Adding your passport information to your profile will allow us to include it in your reservations. Having this information in your reservation can make international travel a little easier.

**Passports** [\[+\] Add a Passport](#)

I do not have a passport

**International Visas** [\[+\] Add a Visa](#)

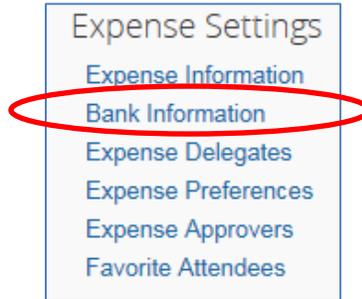
Now that your email is verified, you can send your expense receipts directly to Concur via email at receipts@concur.com.

### Add Banking Information

By adding your banking information to your profile, Concur can electronically deposit reimbursements for expenses you incurred directly to your personal account.

To add your banking information:

1. On the left side of the page, under **Expense Settings**, click **Bank Information**.



2. On the **Bank Information** page, enter the routing number for your bank. The routing number is 9 digits long, and is usually located in the lower left corner on your checks.

A screenshot of the 'Bank Information' form. The form contains the following fields: Bank Country (dropdown menu with 'UNITED STATES' selected), Bank Currency (text input with 'US, Dollar'), Routing Number (text input, circled in red), Bank Account Number (text input), Re-Type Bank Account Number (text input), Bank Name (text input), Branch Location (text input), Account Type (dropdown menu with 'Checking' selected), Status (text input), and Active (dropdown menu with 'Yes' selected). At the bottom left is a blue 'Save And Agree' button. Below the form is a disclaimer: 'By entering your bank account information you are authorizing direct deposit using electronic funds transfer into this account for amounts due to you. If you do not want to authorize direct deposit then you should not enter your bank account information.'

- In the next two fields, enter your bank account number, and then re-type your account number to confirm.

**Bank Information**

Bank Country: UNITED STATES (dropdown)  
 Bank Currency: US, Dollar

Routing Number: [text box]  
 Bank Account Number: [text box]  
 Re-Type Bank Account Number: [text box]

Bank Name: [text box]  
 Branch Location: [text box]  
 Account Type: Checking (dropdown)

Status: [text box]  
 Active: Yes (dropdown)

**Save And Agree**

By entering your bank account information you are authorizing direct deposit using electronic funds transfer into this account for amounts due to you. If you do not want to authorize direct deposit then you should not enter your bank account information.

- Select the appropriate Account Type – either Checking or Savings, and then click the **Save and Agree** button.

**Bank Information**

Bank Country: UNITED STATES (dropdown)  
 Bank Currency: US, Dollar

Routing Number: [text box]  
 Bank Account Number: [text box]  
 Re-Type Bank Account Number: [text box]

Bank Name: [text box]  
 Branch Location: [text box]  
 Account Type: Checking (dropdown)

Status: [text box]  
 Active: Yes (dropdown)

**Save And Agree**

By entering your bank account information you are authorizing direct deposit using electronic funds transfer into this account for amounts due to you. If you do not want to authorize direct deposit then you should not enter your bank account information.

- A confirmation message appears. Click **OK** to return to the Bank Information page.

Your account will initially have a status of Unconfirmed. Concur will perform a "penny test" by depositing one cent in the account you identified. If the transaction is successful, the account is confirmed. This process usually takes 3-4 days, and during this time, you will be unable to submit expense reports.

## Select Default Expense Approver

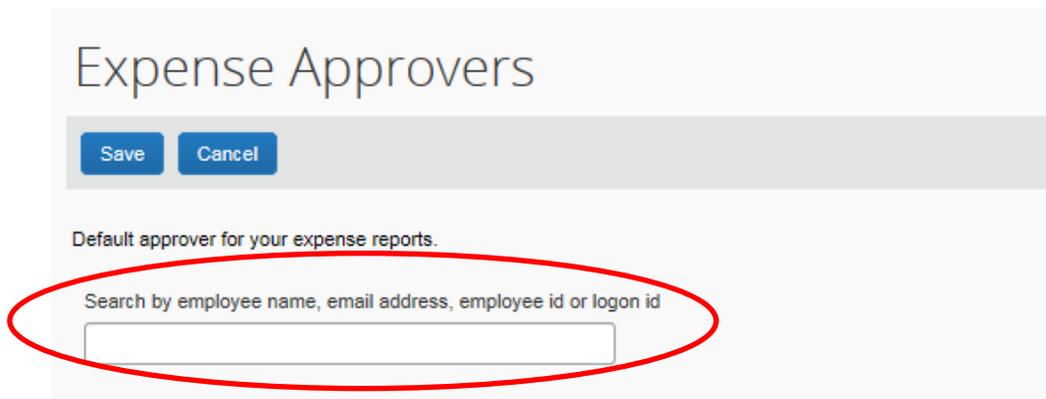
All expense reports are required to be reviewed and approved prior to reimbursement. Selecting a default approver in your profile enables you to pre-populate the **Approver** field with your selection when you submit a report. If you need to assign a different approver for a specific report, you can do so prior to submission.

To select a default Approver:

1. On the left side of the page, under **Expense Settings**, click **Expense Approvers**.



2. On the Expense Approvers screen, search for the person who is responsible for approving your expense reports.
  - If you do not know who your approver should be, contact your Tub Finance office.



3. Once you've entered the first few characters of your search term, the system will provide options that match what you've entered so far. Select the desired approver when it appears in the list.
4. Once you select an Approver from the list, click **Save**.

## Registering Your Account for Mobile

There are two mobile apps you can use with Concur: Concur Mobile and Expenselt.

The Concur Mobile app enables you to use your smartphone to perform many of your expense reporting tasks available in the Concur system, including:

- Capturing receipts, hotel folios, and other documents, such as conference agendas.
- Uploading the captured images directly your Available Receipts library.
- Creating new expense reports
- Editing and managing existing expense reports
- For managers or approvers, immediately approving or rejecting expense reports.
- Adding car mileage totals to expense reports.

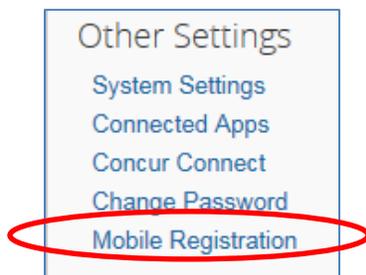
The Expenselt app is designed to make the process entering expenses much easier. Specifically, the app:

- Captures receipts and other documents using your phone's camera
- Scans the receipt and automatically creates an expense entry, based on the information on the receipt.
- Uploads the expense to your Available Expenses library, with the receipt image already attached.

To use either of the apps, you must first registering your account and select a mobile PIN.

To register your account for the mobile apps:

1. On the left side of the page, under **Other Settings**, click **Mobile Registration**.



2. On the **Mobile Registration** page, click the **create a mobile PIN** link.

A screenshot of the 'Mobile Registration' page. The page has a blue header with the text 'Capture your receipts and manage your travel on the go!' and a 'Learn More' button. Below the header are images of a smartphone, a tablet, and a feature phone. The main content area is divided into two sections: 'REVIEW YOUR LOGIN DETAILS' and 'DOWNLOAD THE APP'. The 'REVIEW YOUR LOGIN DETAILS' section shows 'Login Information' with 'Username: x.charles\_sumner@harvard.edu' and 'Password: Use the same password you use to log in to Concur for Web. If you don't know your password, you may reset your password or create a mobile PIN'. The 'create a mobile PIN' link is circled in red. The 'DOWNLOAD THE APP' section shows icons for Apple, Android, Windows, and another platform, and a text box with the email 'charles\_sumner@harvard.edu' and a 'Send Link' button.

3. Enter your PIN in the **Create PIN** field, and again in the **Retype PIN** field to confirm.

**Mobile Registration**

Capture your receipts and manage your travel on the go!

[Learn More](#)

**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:**  no spaces

[Set PIN](#)

[Go back to username and password information](#)

**DOWNLOAD THE APP**






Or send a link to your device - enter your email address or mobile phone number (including country code for non-US numbers) and we will send you a link to get the app:

[Send Link](#)

4. Click **Set PIN**.
5. Once you've updated your Mobile PIN, download the Concur app by clicking the link corresponding to your mobile device, or click the **Send Link** button to receive an email containing links to get the app.

**Mobile Registration**

Capture your receipts and manage your travel on the go!

[Learn More](#)

**SET UP PIN FOR MOBILE**

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[Set PIN](#)

[Go back to username and password information](#)

**DOWNLOAD THE APP**






Or send a link to your device - enter your email address or mobile phone number (including country code for non-US numbers) and we will send you a link to get the app:

[Send Link](#)

Once you download the app, you can login using your username, which is your HUID@harvard, and the Mobile PIN you selected.

## Select Default Account Code

Every expense report must be associated with at least one account code. In order to create a new report, you are required to select an account code before you can add any expenses to the report.

Selecting a default account code in your profile enables you to pre-populate the account code fields when you create a report, but you can always change these fields for a specific report, if necessary.

**NOTE:** If you do not know which account code you should select as your default, contact your TUB Finance office.

To select a default account code:

1. On the left side of the page, under **Expense Settings**, click **Expense Information**.



2. On the Expense Information screen, the **TUB** and **ORG** are pre-populated, but can be changed. Select the desired codes for **FUND**, **ACTIVITY**, **SUB-ACTIVITY**, and **ROOT**.

The screenshot shows the 'Expense Information' form. At the top left are 'Save' and 'Cancel' buttons. The form contains the following fields:

- User Group: TEST USER
- Reimbursement Currency: US, Dollar
- TUB: 1 ;ADM^Central Administration
- ORG: 2 Workplace Development, VPHR
- FUND: 3 1) Unrestricted Undesignated
- ACTIVITY: 4 eral Admin+General Expense
- SUB-ACTIVITY: 5 (0000) 780008^Unspecified
- ROOT: 6 (00000) Unspecified
- Traveler Type: Other

3. Click **Save**.

## 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**.