Concur Guide for Delegates

HARVARD UNIVERSITY

In Concur, delegates are able to perform a number of tasks on behalf of another user, including modifying profile settings and creating expense reports.

FAQS and Other Training Materials: travel.harvard.edu/concur

24 Hour Concur User Support: 617-495-8500, option 6 or 866-793-4040

Harvard User Support: concurhelp@harvard.edu or 617-495-8500, option 2

Delegate Basics

Modifying profile settings or completing an expense report requires first signing into a reimbursee account

Sign in as a Delegate into a Reimbursee Account

1. Log into Concur under your account
2. Click the **Profile** button at the top right
3. Click the **Acting as Other User** drop-down menu and select the name of the person for whom you are acting as a delegate for
4. Click **Start Session**. When the screen refreshes, the Profile drop-down will change to **Acting as** followed by the reimbursee name

Return to your own Account

1. Click on the **Acting as** drop-down
2. Click Done acting as others. When the screen refreshes, you will be back to your own account

Verify Reimbursees you can Delegate for:

1. Log into Concur under your account
2. Click the **Profile** button at the top right, then **Profile Settings**
3. Under **Expense Settings** click on **Expense Delegates**
4. Click the **Delegate For** link
5. Listed will be the Reimbursees you can delegate for with associated responsibilities. To modify these settings, ask the Reimbursee or concurhelp@harvard.edu

Delete Reimbursees from your Profile:

1. Log into Concur under your account
2. Click the **Profile** button at the top right, then **Profile Settings**
3. Under **Expense Settings** click on **Expense Delegates**
4. Click the **Delegate For** link
5. Click the **checkbox** to the left of the Reimbursee name you no longer wish to be a delegate for
6. Click **delete**

Modify Reimbursee Profile Settings

Verify Email to Enable Email Receipt Functionality

1. Sign in as a Delegate into a Reimbursee Account
2. Under **Your Information** click **Personal Information**
3. Scroll down to **Email Addresses**
4. Click **Verify** to send a verification code to the email of the reimbursee
5. Enter the validation code from the email into Concur to complete the verification process

Enter or Modify Default Coding

1. Sign in as a Delegate into a reimbursee account
2. Under **Expense Settings**, click **Expense Information**
3. Enter the **Account Code** that reimbursements should be charged to (this can be modified later per report)
4. Click **Save**

Modify Email Preferences

1. Sign in as a Delegate into a reimbursee account
2. Under **Expense Settings**, click **Expense Preferences**
3. **Deselect** the notifications the reimbursee does not wish to receive
4. Click **Save**

Enter or Modify the Default Approver

1. Sign in as a Delegate into a reimbursee account
2. Under **Expense Settings**, click **Expense Approvers**
3. Enter the name of the Default Approver for the reimbursee into the **Search Box**
4. Select the **Approver** from the list of names
5. Click **Save**

Notify Reimbursee

Notify a Reimbursee that an Expense Report is Ready for Submission

All expense reports must be reviewed and submitted by the employee who incurred the expenses

1. On the top right of the expense report click **Notify Employee**
2. An email will be sent to the reimbursee, notifying them that an expense report is ready for review and submission. Reports can be submitted through the Concur website or the Concur mobile app

Edit a Report After Notifying the Reimbursee

1. Open the expense report under **Open Reports**
2. Click **Mark as Not Complete** on top right corner
3. Make changes, then click **Notify Employee**

Note: This can only be done before a reimbursee reviews and approves an expense report. If modifications are required after submission, the reimbursee will need to recall the report or an approver will need to send the report back to the user

View, Upload and Attach Receipts

View Available Receipts

1. On the Concur home page of the reimbursee, click **Upload Receipts** at the top of the page
2. This page shows all of the available receipts within the Receipt Store and allows you to upload additional receipts

Upload Receipts via Desktop

1. On the Concur home page of the reimbursee, click **Upload Receipts** at the top of the page
2. Click the **Upload** button
3. Click **Browse**
4. Click **Upload,** then click **Close.** The receipt will now appear in the Available Receipts Library

Upload Multiple Receipts via Desktop

1. On the Concur home page of the reimbursee, click **Available Expenses**
2. Scroll down to **Available Receipts**
3. Open your computer directory and select the receipts
4. Drag the receipts to the **Upload New Receipt** box. The receipts will now appear in the Available Receipts Library

Email Receipts to a Reimbursee Account

In order to use this functionality, the email for the reimbursee must first be verified in Concur and the delegate must have access to the account to send emails on behalf of the reimbursee

1. Open the receipt email in the verified email account of the reimbursee
2. Forward the email to **receipts@concur.com**

Email Receipts to a Reimbursee 's Account If you do not have Access to their Email

In order to use this functionality, both the email of the delegate and reimbursee must first be verified with Concur

1. **Create** an email (with the receipt in the body of the email, or as an attachment)
2. In the **subject line**, enter the Employee's verified email address
3. **Send** the email to **receipts@concur.com**

Note: To verify an email, refer to the profile settings instructions. If an email with an attachment is sent, only the attachment will be uploaded to Concur. **Attachments must be in PDF or JPG format**

Attaching Receipts from Receipt Library

1. **Option 1:** While in the detailed screen of the transaction, click on the **Available Receipts** link. Find the appropriate receipt, then click the icon
2. **Option 2:** While in the detailed screen of the transaction, click on the **Attach Receipt** button. Click on the appropriate receipt. Then click **Attach**

Viewing Attached Receipts

There are multiple ways to view receipts:

1. Hover over the **icon**
2. Click the **Receipt Image** tab of an expense
3. Click the **Receipts** dropdown and select **View Receipts in a New Window** or **View Receipts in the Current Window.** This will show all receipts, including receipts attached to the report header in the order they were attached to the report

Reimbursee Mobile Transactions

Through the Concur Mobile App, a reimbursee can link their account to capture receipts that will automatically load to their Concur profile. There are 2 options for capturing receipts:

1. **Option 1:** If a user captures a receipt then clicks **Done**, it will be uploaded to the **Receipt Library**
2. **Option 2:** If the user captures a receipt then clicks **Expense**, it will be uploaded to **Available Expenses** and display the icon in the **source** column

Creating an Expense from the Available Expenses Library

1. While in the expense report, click on **Import Expenses**
2. Click the **box** to the left of the mobile expense name, then click **Move**
3. Click on the moved expense name to view and modify the expense details
4. Click the **Receipt Image** tab or hover over the icon to view the mobile receipt

Expense Matching (Smart Expenses)

If a user captures a receipt with additional detail that matches a credit card transaction, Concur will attempt to match both expenses. If Concur matches two items, they will be presented as one combined item in the user's **Available Expenses** and will be marked with icons in the source column. For more information on receipt matching, refer to: **http://travel.harvard.edu/concur-faq**

Other Tips

- Expense reports will auto-save as they are created so they can be incrementally worked on as transactions come in
- To monitor the approval status of a report: Click on the **Details** dropdown in the expense report, then click on **Approval Flow**
- To view the payment date of a report: Click on the **Details** dropdown in the expense report, then click on **Report Payments**
- Be sure to monitor both **Available Expenses** and **Available Receipts** to ensure all outstanding transactions are processed