

Concur Tip Sheet:

Setting up Your Profile



Overview

Your profile is where Concur stores your personal information for use when creating expense reports, PCard statement reports and processing reimbursements. It also includes options and settings to make the tool easier to use.

This Tip Sheet provides instructions for setting up your Concur profile, including:

- Logging into Concur and confirming your personal information.
- Verifying your e-mail address to submit receipts directly into Concur.
- Adding personal banking information for out-of-pocket reimbursements.
- Assigning your default expense and statement report approver.
- Selecting your default account codes for reports.

Log into Concur

1. Go to the [Concur Homepage](#)
2. Click the link titled **Click to Access Concur** (top right-hand side of the page).
3. Your HarvardKey authentication page will appear. Login.
4. Concur Travel and Expense will automatically load.

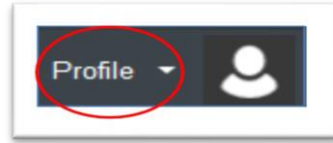
Confirm Personal Information

After logging into Concur with your HarvardKey, the Concur Home page appears.

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To access your Concur Profile:

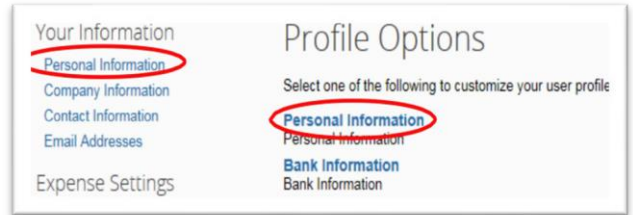
1. Click the **Profile** button at the top right of the window.



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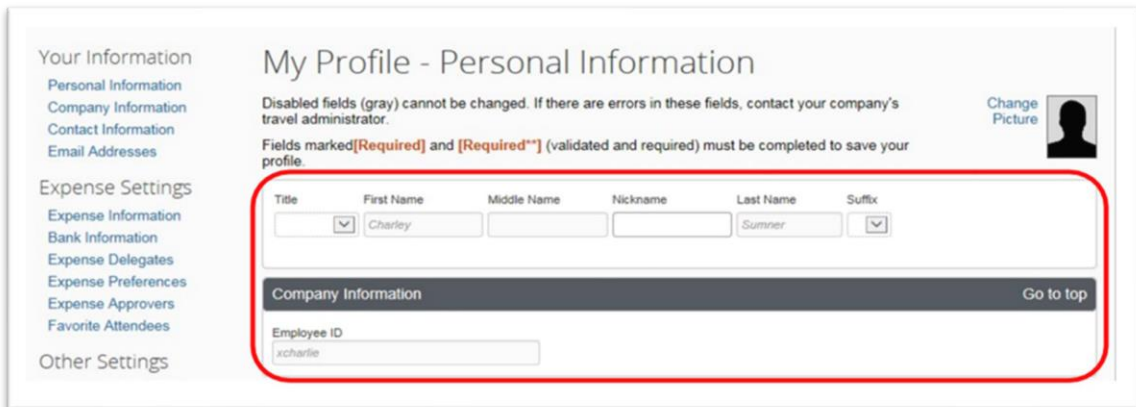


3. On the Profile Options page, click **Personal Information**



4. At the top of the Personal information page, you can confirm that your name and employee ID are correctly displayed.

- If they are not correct, contact your HR representative to have it changed.

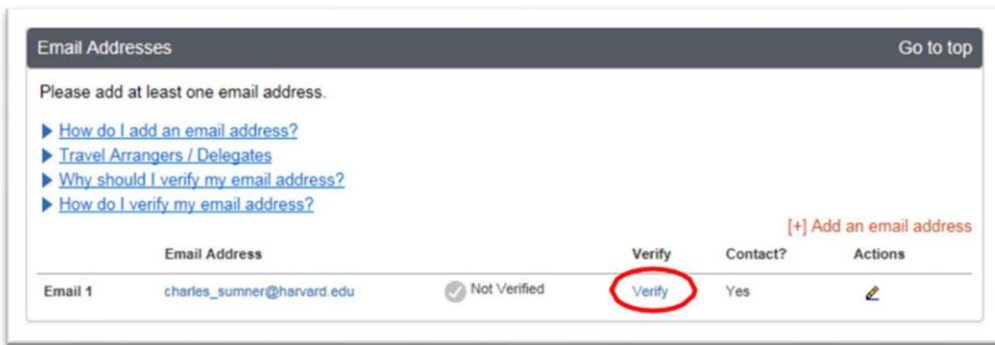


Verify Email Address

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

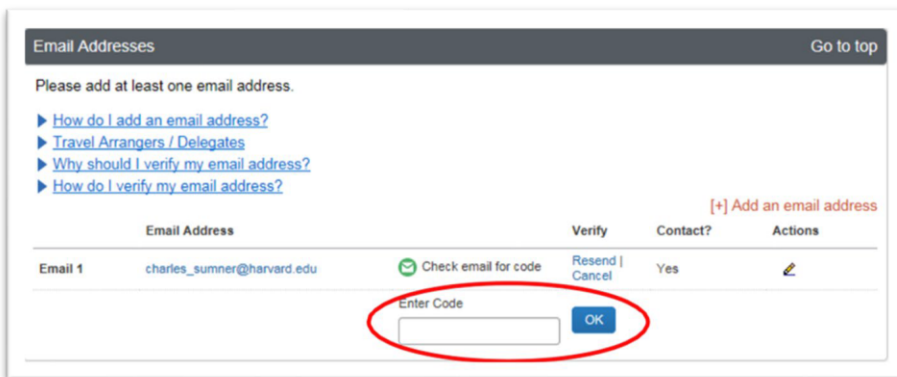
To verify your email address:

1. Scroll down the page to the Email Addresses section or click the Email Addresses link on the left side of the page.
2. Click the Verify link next to your e-mail address



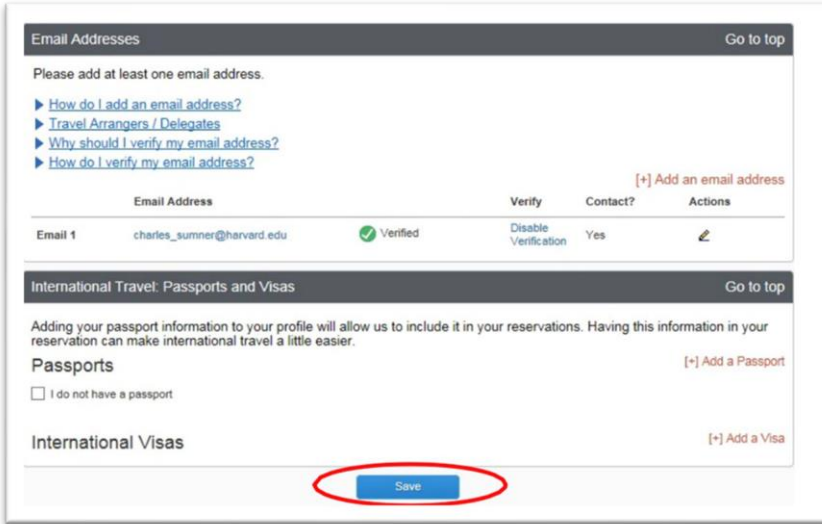
3. The system sends a Verification Code to your e-mail address and displays a confirmation message. Click **OK** to return to the page.

4. Copy the Verification Code from the e-mail you received and paste it into the **Enter Code** field and click **OK**.



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5. A confirmation message appears. Click **OK** to close the message. Then click **Save**.



Now that your e-mail 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 personal profile, Concur can electronically deposit reimbursements for out-of-pocket expenses you incurred directly to your personal account.

***Note:** This step is not applicable for PCard Statement Report users

To add your banking information:

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



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2. On the **Bank Information** page, enter the **Routing number** for your bank, your **Bank Account Number**, Bank Name, Your **Personal Address, City, State** and **Zip Code**. You will then need to click the **Authorization Box** and click **Save**.

The screenshot shows a 'Bank Information' form with several input fields. A blue line points from the 'Save' button to the 'Bank Account Number' field. The form includes fields for Routing Number, Bank Account Number, Re-Type Bank Account Number, Bank Name, Branch Location, Account Type, Status, Active, Personal Address Line 1, Personal Address Line 2, City, State, and ZIP Code. A 'Save' button is at the bottom left, and a checkbox for 'I authorize the use requirement below' is next to it. Below the form is a sample check from 'Bank of Sometown' with a routing number of 234123987, an account number of 001234567891, and a check number of 1001. A 'VOID' watermark is visible on the check.

Setting Default Expense Approver

All expense reports are required to be review 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.

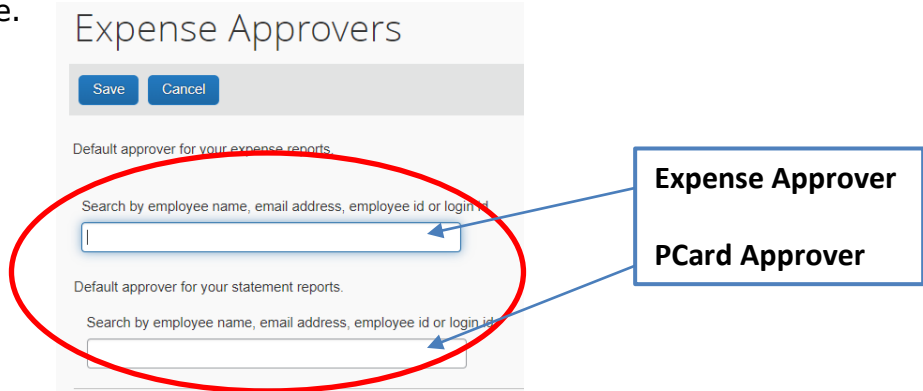
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To select a default Approver:

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 and PCard statement reports (Note: these are two separate designations).
 - If you do not know who your approver should be, contact your Tub Finance office.



3. Enter 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 and click **Save**.

Setting Default Account Code

Every 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.

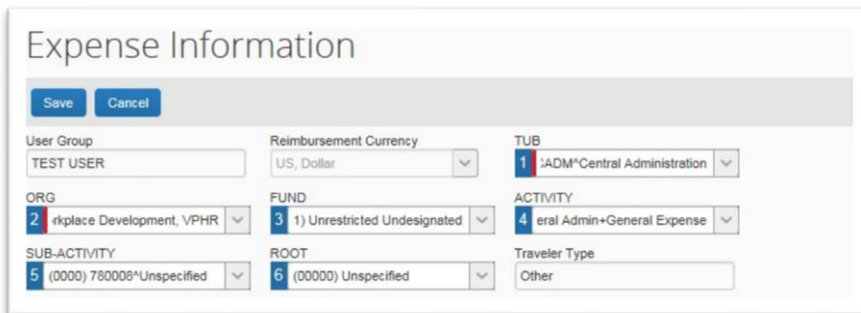
- If you do not know which account code you should select as your default, contact your Tub Finance office.

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** and click **Save**.

A screenshot of the "Expense Information" form. It features a "Save" button and a "Cancel" button at the top left. The form contains several fields: "User Group" (TEST USER), "Reimbursement Currency" (US, Dollar), "TUB" (ADM*Central Administration), "ORG" (Replace Development, VPHR), "FUND" (1) Unrestricted Undesignated, "ACTIVITY" (eral Admin+General Expense), "SUB-ACTIVITY" ((0000) 780008*Unspecified), "ROOT" ((00000) Unspecified), and "Traveler Type" (Other).