Concur Guide for Reimbursees

HARVARD UNIVERSITY

Job Aides and Training Materials: http://travel.harvard.edu/concur-training
FAQs: http://travel.harvard.edu/concur-new-faq
Harvard User Support: concurhelp@harvard.edu or 617-495-8500, option 2

Getting Started

Log on to Concur on Desktop

1. Go to travel.harvard.edu/concur
2. Click on the **Click to access Concur** link and enter your Harvard Key

Enter Bank Information

1. On the upper right hand corner of the screen, click **Profile**, then **Profile Settings**
2. Click **Bank Information**
3. Enter your bank **Routing Number** and **Account Number**
4. Change the **Account Type**, if necessary
5. Click **Save and Agree**, then **OK**

Enable Email Receipt Functionality

1. On the upper right hand corner of the screen, click **Profile**, then **Profile Settings**
2. Click **Personal Information**
3. Scroll down to **Email Addresses**
4. Click **Verify** to send a verification code to your work email
5. Follow the instructions in the email to enter the code

Modify Email Notifications

1. On the upper right hand corner of the screen, click **Profile**, then **Profile Settings***
2. Click **Expense Preferences**
3. Deselect the notifications you do not want to receive, then click **Save**

Setting up Optional Information

Enter/Modify your Default Coding

1. On the upper right hand corner of the screen, click **Profile**, then **Profile Settings**
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**

Enter/Modify your Default Approver

1. On the upper right hand corner of the screen, click **Profile**, then **Profile Settings**
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**

Assign a Delegate to Assist in the Preparation of your Expense Reports

1. Click the **Profile** button at the top right of the window and click **Profile Settings**
2. Under **Expense Settings**, click **Expense Delegates**
3. Click **Add** and a search bar will appear. Enter the name or HUID of the person you want to assign as your delegate
4. Select the desired delegate and click the **Add** button to the right of the search field
5. Next to the delegate's name, select **Can Prepare**, **Can View Receipts**, and **Receives Emails**
6. Click **Save**

Setting up the Concur Mobile App

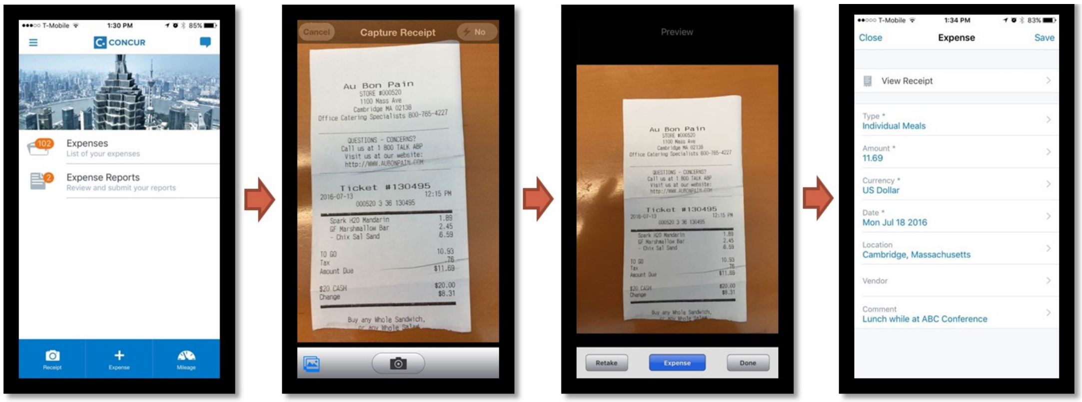
Concur App

The Concur App syncs with the website to upload receipt photos. To download the app, access your mobile app store and search for **Concur.**

Registering for Concur Mobile

1. Using your computer, sign into Concur
2. On the upper right hand corner of the screen, click **Profile**, then **Profile Settings**
3. Under **Other Settings**, click **Concur Mobile Registration**
4. Enter your Harvard e-mail address and you will be sent a link to download the Concur Mobile App
5. Log into the App using your **Harvard Key**

Capturing Receipts with the Concur Mobile App



Open app and click Receipt	Click [camera] to take a photo of the receipt	Click **Done** to save and finish <u>or</u> click **Expense** to add optional details	Optional: Add expense details and comments, then click **Save**

Note: If you capture a receipt then click **Done**, it will appear in your **Receipt Library.** If you click **Expense**, it will appear in your **Available Expenses** and display the icon in the **source** column. 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 Methods of Capturing and Viewing Receipts

Email Receipts to Your Account

1. Verify email address in profile (one time activity)
2. **Create** an email (with the receipt in the body of the email, or as an **PDF or JPG attachment**)
3. **Send** the email to **receipts@concur.com**

Note: If an email with an attachment is sent, only the attachment will be uploaded to Concur.

Upload Receipts via Desktop

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

Quick Reference for Business Purpose

IRS regulations require a complete business purpose. The Concur Business Purpose field will only allow 64 characters. Focus on the 'why' - Enter a brief explanation of **why** the expense is Harvard business, if applicable, Include the travel dates. Abbreviations are welcome.

Examples:

- *CUPA conference registration, May 1-3, 2016 for prof dev.*
- *Guest speaker & 3 lab members to talk about DNA project X*
- *Food and beverages for the HDS all staff meeting, 4/15/2016*
- *Travel to AAR Annual Meeting (11/21-24, 2016) for prof dev*

Other User 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 audit trail of an expense report: Click on the **Details** dropdown in the expense report, then click on **Audit Trail**
- To view the payment date of a report: Click on the **Details** dropdown in the expense report, then click on **Report Payments**
- To attach a receipt to the header of an expense report: Click on the **Receipts** dropdown in the expense report, then click **Attach Receipt Images**
- To view prior reports: Click on **Expense** at the top of the page, then click on **Report Library**