

Welcome to Concur



HARVARD
UNIVERSITY



Create and process expense reports more efficiently with Concur, Harvard University's new reimbursement tool. Concur allows users to upload receipts with their mobile phone, imports corporate credit card transactions automatically for direct entry into expense reports, and offers more visibility into the status of reimbursements.

For details and guides to creating expense reports, please visit: travel.harvard.edu/concur.

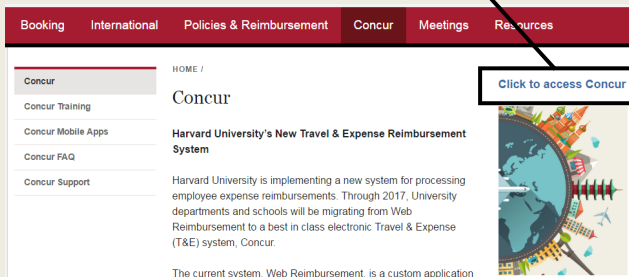
24 Hour Concur User Support: 617-495-8500, option 6 or 866-793-4040

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

Getting Started

LOG ON TO CONCUR

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



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 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**

* You or your delegate can modify various profile settings including email notifications

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**

Setting up the Concur Mobile App

CONCUR APP

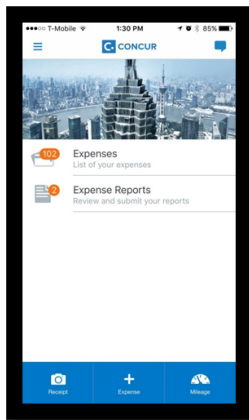
The Concur App syncs with the website to quickly upload receipt photos. You are able to add expense details and comments (e.g., recruit you are visiting, business meal attendees) to help your delegate complete the expense report. To download the app, access your mobile app store and search for **Concur**.

SET UP MOBILE PIN

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 **Mobile Registration**
4. Create and retype your Mobile PIN, meeting the following requirements:
 - At least 8 characters
 - Combination of uppercase, lowercase and numeric characters
5. Once your Mobile PIN is created, log into app using the assigned HUID@harvard.edu username (ex. 12345678@harvard.edu) and your Mobile PIN

Capturing Receipts: The Concur Mobile App



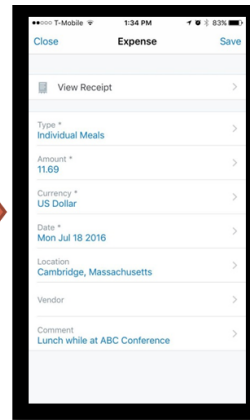
Open app and click



Click  to take a photo of the receipt



Click **Done** to save and finish or click **Expense** to add optional details



OPTIONAL: Add expense details and comments, then click **Save**

Other Methods of Capturing Receipts

EMAIL RECEIPTS TO YOUR ACCOUNT

1. Verify email address in profile (one time activity)
2. Forward email receipts to receipts@concur.com
⇒ Photos, PDFs, and other docs can be sent

UPLOAD RECEIPTS VIA DESKTOP

1. Upload receipt images or other supporting documents from your desktop to the traveler's expense report


Submitting a Report that was Created by a Delegate

After a Delegate creates a report for a Traveler, Concur will send the Traveler an email to let them know that a report is ready for them to review and submit. Travelers can submit their reports via their computer or the Concur mobile app.

SUBMITTING VIA COMPUTER

1. From the Concur homepage, the Traveler can see their reports under **Open Reports**
2. Reports that have been completed by a Delegate will say **Ready for Review** in red text
3. Click on that report to review the details, click **Submit**, then **Accept & Submit** to send it for approval

SUBMITTING VIA CONCUR MOBILE APP

1. From the mobile homepage, click on **Expense Reports**
2. Under **Active Reports**, reports that have been completed by a Delegate will have a green icon  and be marked **Not Submitted**
3. The Traveler should click on that report to review the details, click **Submit**, then **Submit** to send it for approval

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
- Include travel dates
- Abbreviations welcome

Note: These items are already included in the expense report in their own fields and do not need to also be included in the business purpose: The employee's name, type of expense (airfare, car rental, business meal, individual meal, etc.), date of each expense, type of payment (CitiBank or out of pocket) and business meal attendees

Examples:

- *CUPA conference registration, May 1-3, 2016 for prof dev.*
- *Guest speaker & 3 lab members to talk about DNA project X*
- *Dinner to discuss cross tub collaboration, 9/14/2016*
- *Food and beverages for the HDS all staff meeting, 4/15/2016*
- *Tvl exp to AAR Annual Meeting (11/21-24, 2015) for prof dev*