Concur: Guide for Reimbursee with a Delegate

HARVARD UNIVERSITY

Concur is Harvard University's new reimbursement tool which replaces Web Reimbursement. Concur allows users to create and process expense reports, upload receipts with their mobile phone, import corporate credit card transactions directly into expense reports and gain more visibility into the status of reimbursements.

For additional job aides, references and FAQs, please visit: **travel.harvard.edu/concur.**
Harvard User Support: concurhelp@harvard.edu or 617-495-7760, option 1
24 Hour Concur User Support: 866-793-4040

What a Delegate Can and Cannot Do

YES

- ✓ Start a Report
- ✓ Modify Reimbursee Email Preferences
- ✓ Notify Reimbursee of Available Report
- ✓ View, Upload, Email and Attach Receipts
- ✓ Scan and Attach Missing Receipt Affidavit (MRA)
- ✓ Modify Default Approver

NO

- X Input or Change Reimbursee Banking Information
- X Approve Reimbursee Report
- X Use System Generated Missing Receipt Affidavit (MRA)
- X ACCEPT and SUBMIT the User Agreement for the Reimbursee
- X Use the Delegate's Mobile App to Upload Receipts to Reimbursee's Receipt Library

Submitting a Report that was Created by a Delegate

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

Submitting via Computer

1. From the Concur homepage, the Reimbursee (or traveler) can see their reports under **Open Reports**
2. Reports that have been completed by a Delegate are marked Ready for Review in red text
3. Click on that report to review the details, click **Submit,** then **Accept & Submit** to send 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. Select the completed report to review the details, click **Submit**, then **Submit** for approval

Checking Status of an Expense Report

- To monitor the Approval Status of a report: Click on the **Details** dropdown in the expense report, then select **Approval Flow**
- To view the Audit Trail of an expense report: Click on the **Details** dropdown in the expense report, then select **Audit Trail**
- To view the Payment Date of a report: Click on the **Details** dropdown in the expense report, then select **Report Payments**

Modifying Email Notifications

1. In 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**

Please reference the 'What email notifications can be turned off in Concur?' in the FAQs for detailed information.