For NERF’S and/or comments in Concur

Who - The name of the individual(s) who incurred the expense.

What - The expense(s) being reimbursed.

When - The date, or date range if the expense happened during travel, that the expense was incurred.

Where - The Location of the expense, City, Country etc.

Why – Topics discussed, business activity, how does it relate to Harvard business and/or the account used.

Information provided:

Professor Canard Malarkey attended a conference in San Francisco from 8/4/18-8/9/18 where he presented his Shenanigans research at the Tomfooleries conference. Canard would like to be reimbursed for airfare, lodging, ground transportation, meals, conference fees and wifi. There was no personal time or alcohol purchased on this trip. Shenanigans grant.

Example business purpose based on the above information:

8/4-9/18 Airfare, lodging, ground trans, meals, conf. reg. & wifi for Prof C Malarkey to travel from BOS-SFO where he presented at the Tomfooleries conf. in support of Shenanigans research.

Information provided:

Professor Canard Malarkey had dinner with Collaborator Trixie Pranks, two Malarkey lab post docs and 3 Malarkey lab grad students to discuss future collaborations at Orinoco in Harvard square on May 5th, 2018. Start up.

Example business purpose based on the above information:

5/5/18 Dinner at Orinoco in Cambridge with 1 Faculty, 1 Collaborator, 2 Post Docs & 3 grad students to discuss future collaborations.

Information provided:

Professor Canard Malarkey had lunch with Collaborator Trixie Pranks, and post doc Larking Mischiefs to discuss upcoming collections fieldwork in Pennsylvania at John Harvard’s Brew House in Harvard square on May 25th, 2018. Start up.

Example business purpose based on the above information:

Information provided:

Professor Canard Malarky attended a conference in San Francisco from 8/4/18-8/9/18 where he presented his Shenanigans research at the Tomfooleries conference. Canard would like to be reimbursed for airfare, lodging, ground transportation, meals, conference fees and wifi. There was no personal time or alcohol purchased on this trip.

Example Concur business purposes based on the above information:

8/4-9/18 Airfare BOS-SFO present Tomfooleries conf; Shnngns rsrch
8/4-9/18 Lodging BOS-SFO present Tomfooleries conf; Shnngns rsrch
8/4-9/18 Gr Trns BOS-SFO present Tomfooleries conf; Shnngns rsrch
8/4-9/18 Meals BOS-SFO present Tomfooleries conf; Shnngns rsrch
8/4-9/18 Conf Reg BOS-SFO prsnt Tomfooleries conf; Shnnngns rsrch
8/4-9/18 Wifi BOS-SFO present Tomfooleries conf; Shnngns rsrch

(NOTE: I could have left the word “present” off or abbreviated it in all of them. I also could have abbreviated “Tomfooleries”. Ultimately what you choose to abbreviate and how is a judgement call. In addition, BOS for Boston and SFO for San Francisco could have been state abbreviations MA-CA. The idea is to cram as much meaningful/identifiable information into the BP as clearly as possible.)

Information provided:

Professor Canard Malarky had dinner with Collaborator Trixie Pranks, two Malarky lab post docs and 3 Malarky lab grad students to discuss future collaborations at Orinoco in Harvard square on May 5th, 2018. Start up.

Example Concur business purpose based on the above information:

5/5/18 Meal Camb w/ Lab mmbrs & Collab discuss clbrtns; Strtup

Information provided:

Professor Canard Malarky had lunch with Collaborator Trixie Pranks, and post doc Larking Mischiefs to discuss upcoming collections fieldwork in Pennsylvania at John Harvard’s Brew House in Harvard square on May 25th, 2018. Start up.

Example Concur business purpose based on the above information:

5/25/18 Meal Camb W/collab TP & LM re clct/fldwrk PA: CM Strtup
Business Purpose Checklist:

☐ Who.
   ☐ Individual who made the purchase
   ☐ Individuals who attended meal, event or went on an expedition.
   ☐ How are they affiliated with this activity, lab members, collaborators, etc?

☐ What.
   ☐ The expense being reimbursed.

☐ When.
   ☐ The date of a single expense, such as a local meal or the purchase of a supply.
   ☐ Date range should be used for expenses that happened during a trip (i.e. airfare, lodging, meals, etc.).
   ☐ If the expense is for an Employee is the expense within 90 days?
   ☐ Is the expense for future travel or has travel concluded?

☐ Where.
   ☐ Includes location (i.e. restaurant), city, state and country if out of the US.

☐ Why.
   ☐ Topics Discussed.
   ☐ Business activity.
   ☐ How does it relate to Harvard Business and/or the account that is being used?