

# HHMI – Abacus End-user Experience

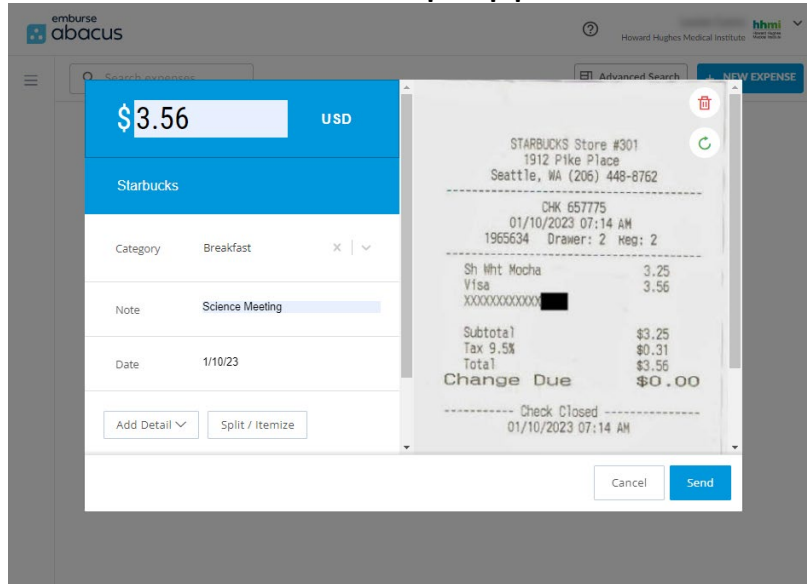
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Non-HHMI Employee Expense Reimbursement Application

# What is emburse abacus ?

Abacus is the application tool used to process Non-HHMI employee business expense reimbursement requests.

Desktop App



The desktop app interface shows a 'New Expense' form. The top bar includes the 'emburse abacus' logo and the user's name 'Howard Hughes Medical Institute'. The form has a search bar and a 'NEW EXPENSE' button. The main form fields are:

- Amount:** \$3.56 USD
- Starbucks:** (Starbucks logo)
- Category:** Breakfast
- Note:** Science Meeting
- Date:** 1/10/23

Below the form are buttons for 'Add Detail' and 'Split / Itemize'. A receipt preview is shown on the right, displaying the Starbucks receipt details:

STARBUCKS Store #301  
1912 Pike Place  
Seattle, WA (206) 448-8762

CHK 657775  
01/10/2023 07:14 AM  
1965634 Drawer: 2 Reg: 2

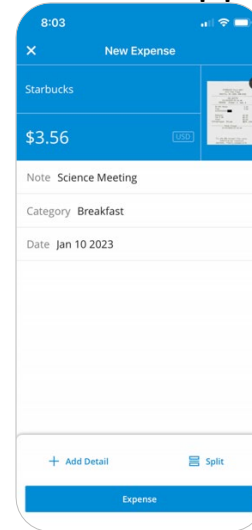
Sh. Hlt Mocha 3.25  
Visa 3.56  
XXXXXXXXXXXX

Subtotal \$3.25  
Tax 9.5% \$0.31  
Total \$3.56  
Change Due \$0.00

Check Closed  
01/10/2023 07:14 AM

Buttons at the bottom: Cancel, Send

Phone App



The phone app interface shows a 'New Expense' form. The top bar includes the time '8:03' and the user's name 'Howard Hughes Medical Institute'. The form has a search bar and a 'NEW EXPENSE' button. The main form fields are:

- Amount:** \$3.56 USD
- Starbucks:** (Starbucks logo)
- Note:** Science Meeting
- Category:** Breakfast
- Date:** Jan 10 2023

Below the form are buttons for '+ Add Detail' and 'Split'. A receipt preview is shown on the right, displaying the Starbucks receipt details:

STARBUCKS Store #301  
1912 Pike Place  
Seattle, WA (206) 448-8762

CHK 657775  
01/10/2023 07:14 AM  
1965634 Drawer: 2 Reg: 2

Sh. Hlt Mocha 3.25  
Visa 3.56  
XXXXXXXXXXXX

Subtotal \$3.25  
Tax 9.5% \$0.31  
Total \$3.56  
Change Due \$0.00

Check Closed  
01/10/2023 07:14 AM

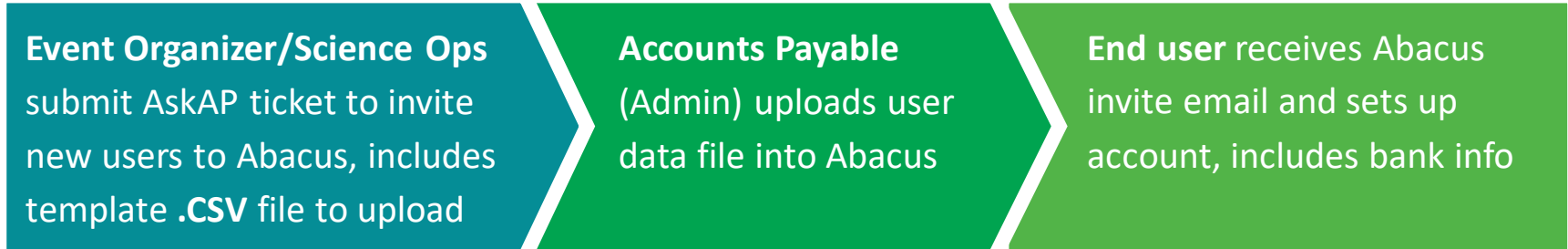
Buttons at the bottom: Expense

# Abacus Roles and Process Overview

- **End user** *Event Attendee or Non-HHMI Employee*
- **Manager** *HHMI Event Organizer, Lab Manager or Science Operations Team member*
- **2<sup>nd</sup> Level Approver** *HHMI Event Organizer, Lab Manager or Science Operations Team member*  
(If applicable)
- **Admin** *HHMI Accounts Payable Team member*

# Abacus Roles and Process Overview

## Account Set Up



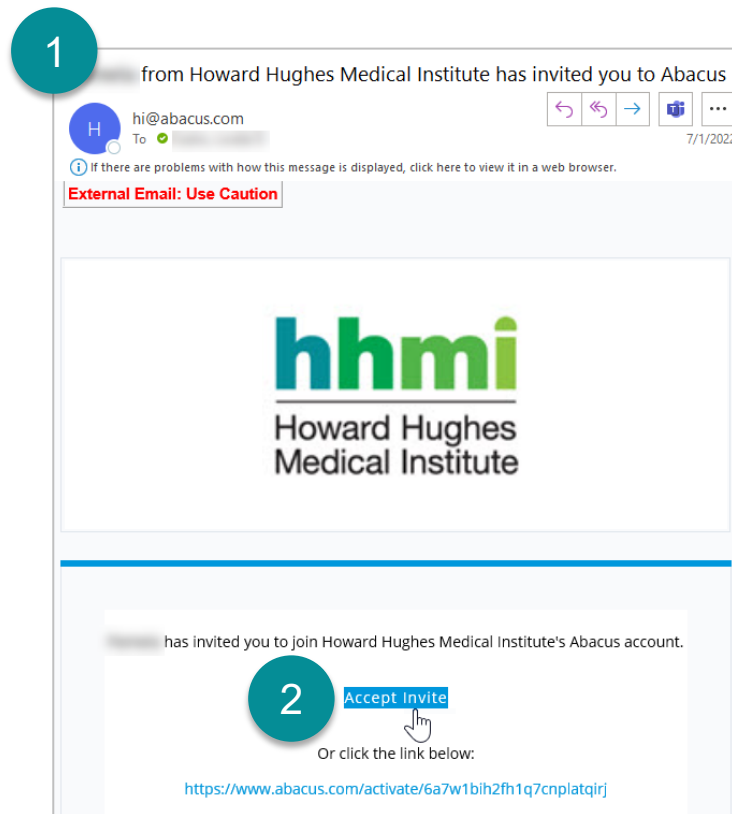
## Expense Request



- End user receives email notification when expense is Submitted, Approved and Awaiting Payment, Denied, and Completed (Paid).
- Approver (Manager, Admin) receives email notification when expense is pending their approval.
- Expense must be fully approved by 5pm E.T. on Wednesday in order to be paid by Thursday or Friday in the same week.

# Account Set Up

1. Receive email invitation to Abacus
2. Click on **Accept Invite**



# Account Set Up

3. In blank field, **Create Password**
4. Click on checkbox for *Terms and Privacy Policy*
5. Click on **Get Started**


The screenshot shows the Abacus account setup interface. At the top is the Abacus logo. Below it, a message states: "You've been invited to join the Howard Hughes Medical Institute team on Abacus." There are two input fields: the first is for an email address (partially obscured by a blurred image), and the second is for a password, indicated by a callout circle with the number 3. Below the password field is a checkbox, indicated by a callout circle with the number 4, with the text "By activating your account, you agree to our [Terms and Privacy Policy](#)." At the bottom is a blue "Get Started" button, indicated by a callout circle with the number 5 and a mouse cursor icon.

# Account Set Up

6. Select preferred Two-Factor Authentication method (SMS or Email Verification)

Then, click **SEND CODE**

6



With Two-Factor Authentication enabled, you will need both your password and a verification code to log in. Select your preferred method for receiving a verification code.

☒ **SMS Verification**  
A code will be sent to the number below.  
Standard messaging rates apply.

☐ **Email Verification**  
A code will be sent to your email address.

Mobile Phone Number

▼

1 (702) 123-4567

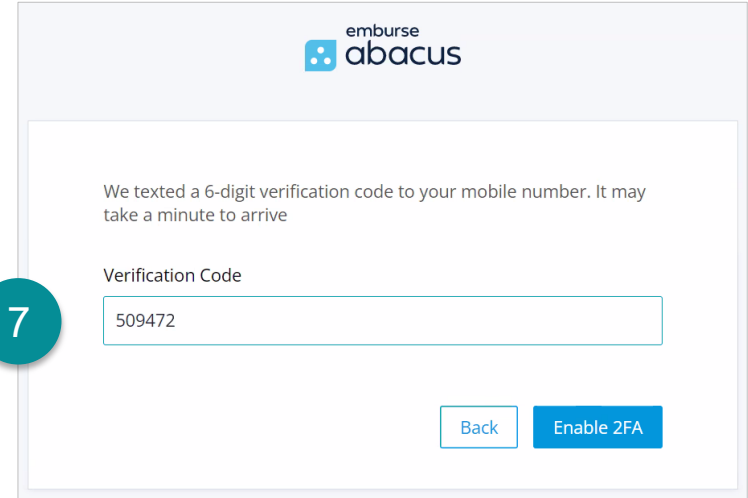
**SEND CODE**

# Account Set Up

7. Enter Verification Code from SMS text or Email

Then, click **Enable SFA**

7



The screenshot shows the 'emburse abacus' logo at the top. Below it, a message states: 'We texted a 6-digit verification code to your mobile number. It may take a minute to arrive'. A label 'Verification Code' is positioned above a text input field containing the code '509472'. At the bottom right, there are two buttons: 'Back' and 'Enable 2FA'.

emburse  
abacus

We texted a 6-digit verification code to your mobile number. It may take a minute to arrive

Verification Code

509472

Back Enable 2FA

# Account Set Up

## 8. Click **CONTINUE TO ABACUS**

8



You've successfully enabled Two Factor Authentication. Copy your backup code so you can access your account in the event that you cannot receive access codes. You can close this when you are finished.

ndEXWV17QT

 COPY

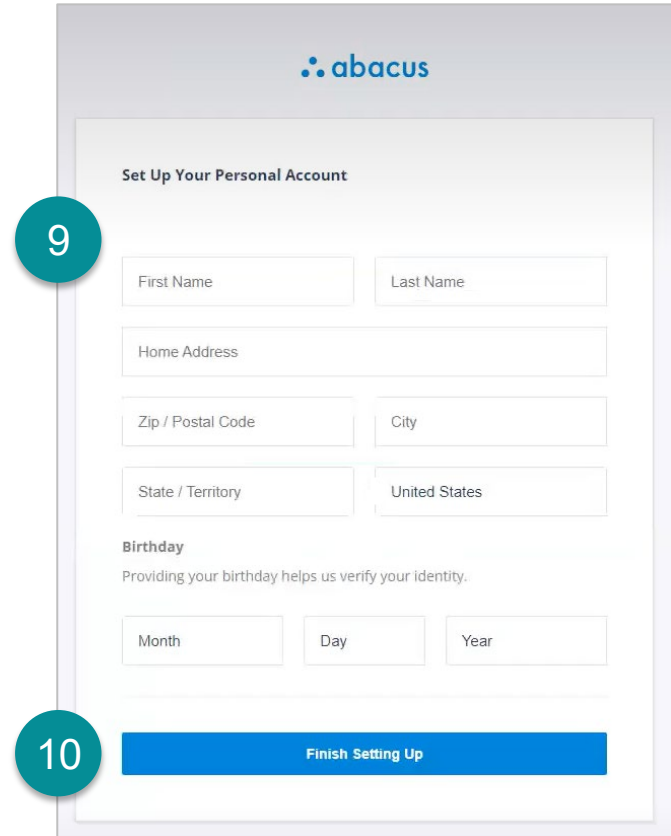
CONTINUE TO ABACUS

Take a screenshot, or copy your backup code to complete Two factor authentication setup.

# Account Set Up

9. Enter your account information

10. Click on **Finish Setting Up**



The screenshot shows the 'abacus' logo at the top right. Below it is the heading 'Set Up Your Personal Account'. The form contains several input fields: 'First Name', 'Last Name', 'Home Address', 'Zip / Postal Code', 'City', 'State / Territory', and 'United States'. Below these is a 'Birthday' section with a note 'Providing your birthday helps us verify your identity.' and three input fields for 'Month', 'Day', and 'Year'. At the bottom, a blue button labeled 'Finish Setting Up' is highlighted with a teal circle containing the number 10. A teal circle containing the number 9 is positioned to the left of the 'First Name' and 'Last Name' fields.

9

10

# Account Set Up

11. Click on **Bank Account**

12. Click on  
**+CONNECT BANK**

13. Enter your US-based  
Bank Account information

14. Click on **ADD ACCOUNT**

Account set up is now complete  
and ready for use.

The screenshot shows the 'emburse abacus' interface. On the left is a sidebar menu with options: 'Try the New Abacus', 'Account Information', 'Bank Account' (highlighted with a blue circle and the number 11), 'Bank Transfer History', 'Security', 'Email Accounts', and 'Notification Settings'. The main content area is titled ': Bank Account' and includes a sub-header 'Connect your personal bank account to get reimbursed. [Learn more](#)' and a blue button labeled '+ CONNECT BANK' (highlighted with a blue circle and the number 12). A modal window titled 'Connect Bank' is open in the foreground. It contains a check image with a blue box around the routing and account numbers (highlighted with a blue circle and the number 13). Below the check, there are input fields for 'Name on Account', 'Routing Number (ACH)', 'Account Number', and 'Confirm Account Number'. A dropdown menu for 'Select An Item\*' is set to 'Checking'. At the bottom of the modal are 'CANCEL' and 'ADD ACCOUNT' buttons (highlighted with a blue circle and the number 14).

# Submit Expense

1. Click **+ NEW EXPENSE**
2. Enter expense details  
Amount • Merchant/Mileage •  
Category • Note • Date
3. If expense over \$75, attach receipt
4. Click on **Send**
5. Receive email when expense is  
Submitted • Approved and Awaiting  
Payment • Denied • Completed (Paid)

The screenshot shows the 'emburse abacus' web interface. A modal form for submitting an expense is open. The form has a blue header with a currency selector set to 'USD' and a value of '\$3.56'. Below this, the merchant is set to 'Starbucks'. The form fields include: 'Category' (Breakfast), 'Note' (Science Meeting), and 'Date' (1/10/23). At the bottom of the form are buttons for 'Add Detail', 'Split / Itemize', 'Cancel', and 'Send'. A receipt from Starbucks is attached to the right of the form. The receipt details include: Starbucks Store #301, 1912 Pike Place, Seattle, WA (206) 448-8762; Check #657775; Date/Time 01/10/2023 07:14 AM; Drawer 2; Reg 2; Items: Sh Mlt Mocha (3.25), Visa (3.56); Subtotal (\$3.25), Tax 9.5% (\$0.31), Total (\$3.56); Change Due (\$0.00). The receipt also notes 'Check Closed 01/10/2023 07:14 AM'. Four numbered callouts (1-4) are overlaid on the image: 1 points to the '+ NEW EXPENSE' button in the top right; 2 points to the 'Category' dropdown; 3 points to the receipt; 4 points to the 'Send' button.

emburse abacus

Howard Hughes Medical Institute

1

2

3

4

Search expenses

Advanced Search

NEW EXPENSE

\$3.56 USD

Starbucks

Category Breakfast

Note Science Meeting

Date 1/10/23

Add Detail

Split / Itemize

Cancel

Send

STARBUCKS Store #301  
1912 Pike Place  
Seattle, WA (206) 448-8762

CHK 657775  
01/10/2023 07:14 AM  
1965634 Drawer: 2 Reg: 2

Sh Mlt Mocha 3.25  
Visa 3.56  
XXXXXXXXXXXX


Subtotal \$3.25  
Tax 9.5% \$0.31  
Total \$3.56  
Change Due \$0.00


Check Closed  
01/10/2023 07:14 AM

# Email Approval/Payment


## Expense Approved

2 of your expenses have been approved


 hi@abacus.com  
To [redacted]  
7/7/2022



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Howard Hughes  
Medical Institute

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2 of your expenses have been approved


You should receive payment for any reimbursable expenses by Jul 18th at the very latest,  
but it'll likely be before then!


**\$1.69 - Barwood**  
Meeting-Scenario 5  
Jul 7th, 2022

**\$1.39 - Dunkin'**


## Payment: Bank Transfer Started

Your Abacus bank transfer has started

 hi@abacus.com  
To [redacted]  
7/14/2022



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Howard Hughes  
Medical Institute

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**\$4.37 transfer started**

**From**  
Howard Hughes Medical Institute

**Destination**  
CAPITAL ONE, NA - xxxxxxxx [redacted]

**Expected Arrival**  
Tomorrow - Friday, July 15th

Credits started before 7PM ET on business days arrive the next business day. Business days are Mon - Fri, excluding bank holidays.

Note: Expense must be fully approved by 5pm E.T. on Wednesday in order to be paid by Thursday or Friday in the same week.

# Review Expenses

1. Click **Expenses** to view your expenses in each status.
2. Click on an expense to view details, including its **PROGRESS** in the process.

The screenshot shows the Abacus expense management interface. A blue sidebar on the left contains navigation links: Expenses, Suggested Expenses, Trips, Receipts, Cards, Expense Policy, Account & Settings, Support, Chat with us!, and Log Out. The main content area has a top summary bar for 'Pending approval' expenses totaling \$275.79. Below this, there are two sections: 'MY PENDING EXPENSES (1)' and 'APPROVED & AWAITING PAYMENT (10)'. The first section contains one expense item: 'at E-ZPass' for \$21.58, dated 'Yesterday', categorized as 'Commuter Benefit'. The second section contains three items: 'at E-ZPass' for \$20.00 (Friday, Commuter Benefit), 'at Lyft' for \$8.83 (Wednesday, Commuter Benefit), and 'at Costco Wholesale' for \$49.75 (100 stamps for the office, circled on the receipt). A right-hand panel shows details for the selected expense, including a 'NOTE' field, 'CATEGORY' (Employee Perks > Commuter Benefit), and a 'PROGRESS' timeline with steps: Submitted (Sep 30), Approved by (Oct 1), and Final approval (awaiting). Two green callout circles with arrows are present: circle '1' points to the 'Expenses' link in the sidebar, and circle '2' points to the 'at E-ZPass' expense item in the 'MY PENDING EXPENSES' list.

Abacus  
Search expenses...  
Advanced Search New Expense

Expenses 1 Pending approval \$275.79 On its way to you now More Info

Suggested Expenses  
Trips  
Receipts 7  
Cards  
Expense Policy  
Account & Settings  
Support  
Chat with us!  
Log Out

MY PENDING EXPENSES (1)

ST at E-ZPass \$21.58  
Yesterday · Commuter Benefit

APPROVED & AWAITING PAYMENT (10)

ST at E-ZPass \$20.00  
Friday · Commuter Benefit

ST at Lyft \$8.83  
Wednesday · Commuter Benefit

ST at Costco Wholesale \$49.75  
100 stamps for the office (circled on the receipt)

NOTE  
Business purpose...

CATEGORY  
Employee Perks > Commuter Benefit

Add Receipt Add Flight Info

PROGRESS

Submitted Sep 30

Approved by Oct 1

Final approval awaiting

Write a comment...

# Create Trip (Category)

*Optional*

1. Click on **Trips**
2. Enter **Trip Name** and dates
3. Click on **CREATE TRIP**

Note:  
Click **Trips** to manage all your trips (categories).

The screenshot shows the 'emburse abacus' interface. On the left sidebar, the 'Trips' menu item is highlighted with a red circle and the number '1'. The main content area is titled 'Trips' and features a 'CREATE TRIP' button in the top right. A 'Create Trip' modal is open in the center, with a red circle and the number '2' next to the 'Trip Name' input field containing 'Science Meeting'. Below the input field is a date range selector showing '01/16/2023' to '01/20/2023'. At the bottom of the modal, there are 'CANCEL' and 'CREATE TRIP' buttons. A red circle with the number '3' is placed over the 'CREATE TRIP' button, with a mouse cursor pointing at it. The background is slightly dimmed.

# Link Expense to Trip

*Optional*

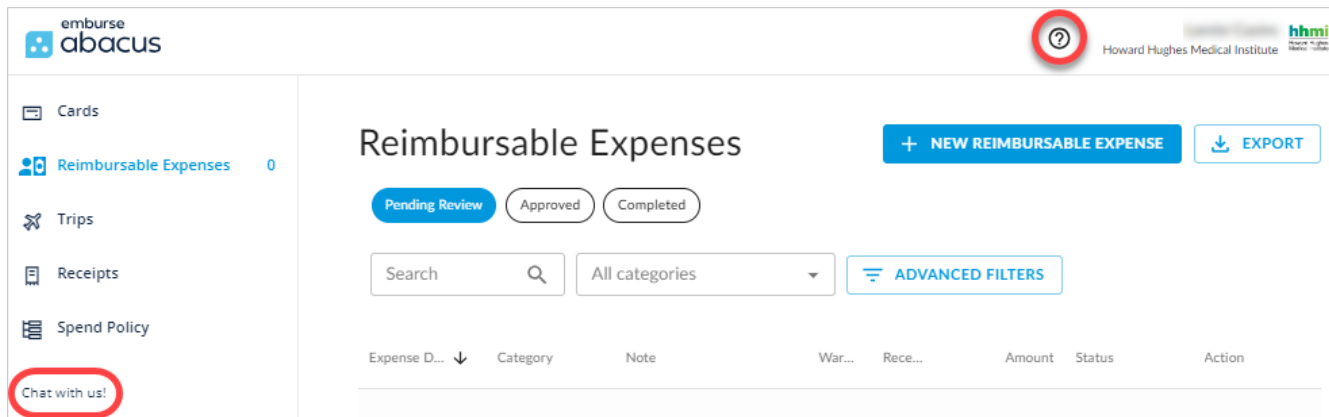
1. On Expense detail's view, click on **Add Detail**
2. Click on **Trip**
3. Select Trip
4. When expense details are completed, click on **Send**

The screenshot displays the 'Add Detail' modal in the Abacus expense management system. The modal is overlaid on the expense detail view for a Starbucks purchase of \$3.56 on 1/10/23. The modal contains a form with the following fields:

- Category:** Breakfast
- Note:** Business purpose...
- Date:** 1/10/23
- Trip:** A dropdown menu is open, showing two options: 'Bi-weekly Lab Meeting - Feb 1' and 'Science Meeting - Jan 16'. The 'Science Meeting - Jan 16' option is highlighted.

At the bottom of the modal, there are two buttons: 'Cancel' and 'Send'. The 'Send' button is highlighted with a red circle and the number 3. The background shows the expense detail view with a blue header displaying '\$3.56 USD' and 'Starbucks'. A receipt image for Starbucks is also visible on the right side of the modal.

# Need Assistance?



1. On Abacus desktop application,
  - a. Click on the help icon at the top right to access Abacus user guides, OR
  - b. Click on **Chat with us!** on left menu and type your question.
2. Contact your Conference Sponsor or HHMI Contact.  
For HHMI labs, contact your Science Operations Manager.
3. Email [askap@hhmi.org](mailto:askap@hhmi.org) for questions or issues.