

Concur Quick Reference Card - Expense

Getting Started

- Access Concur at princeton.edu/concur
- Log in using your NetID and password

Update Your Profile

1. Click **Profile** > **Expense Information**.
2. Enter your desired **Default Project/Grant** for expense reports.
3. (optional) To assign an Expense Delegate to your profile, click **Profile** > **Expense Delegates**. Search for an individual, click **Add** and then **Save**. This individual will be able to prepare expense reports on your behalf.
4. (required) Assign an Expense Approver to your profile by clicking **Profile** > **Expense Approvers**. The individual you select will be responsible for reviewing and approving your submitted expense reports. Click **Save**.

Create an Expense Report

- This section covers creating new expense reports and creating expense reports from an itinerary.

[New Expense Report](#)

[View Reports](#)

Expense a Completed Trip

1. Click **Travel** and locate the trip in your **Trip List**.
2. Under the **Action** column, click **Expense**.
3. Information from your itinerary and travel card expenses transacted during your trip are automatically added to your expense report.
4. Assign **Expense Types** to **Undefined** transactions and address **Exceptions**.
5. Review the report for accuracy and completeness, then **Submit**.

Create a New Expense Report

1. Click **Expense** > **New Expense Report**.
 2. Complete required fields: **Report Name**, **Report Type**, and **Business Purpose**, and change **Project/Grant** if necessary. Click **Next**.
- Adding a travel & expense credit card transaction
When using your University travel & expense card, your transactions are automatically transferred to Concur on a nightly basis.
 - 3. Click **Import** and select transactions from **Smart Expenses** on the right.
 - 4. Click and drag transactions into the **Expenses** section, or use the checkboxes to select charges, then click **Import**.

- Adding an out-of-pocket expense
 5. Click **New Expense** and select an expense type.
 6. Enter a **Transaction Date**, **Amount**, and all required fields indicated by a **red** strip.
 7. If the expense is \$50 or over, click **Attach Receipt** and select a receipt from your receipt store. **Itemize** if necessary.
 8. Click **Save**.

Attach Receipts to an Expense Report

- This section covers importing your receipts by fax, scanner, email, and the Concur mobile app, and using the missing receipt affidavit.

[Attach Receipt](#)

By Fax:

1. From your expense report, use the **Print/Email** drop-down menu to select **Princeton Fax Receipt Cover Page** and click **Print**.
2. Fax the cover page and your receipts to **866-428-9026**.
3. Allow several minutes for processing. Verify that your receipts were successfully attached by clicking **Receipts** > **Check Receipts**.

By Scanner:

1. Scan your receipts and save the file(s) to your computer.
2. Click **Receipts** > **Attach Receipt Images** > **Browse** to locate the files on your computer. Click **Upload** then **Close**.

By Email: *(email address must be verified in your Concur profile)*

1. Email your receipt images as attachments to receipts@concur.com. The receipts will be added to your Receipt Store.
2. From your expense report, click **Receipt Store**. Drag a receipt to the corresponding line item on your report.

Using the Concur mobile app:

1. Within the app, use the camera icon to take a picture of your receipt. The receipt will be added to your Receipt Store.
2. From your expense report, click **Receipt Store**. Drag a receipt to the corresponding line item on your report.

Missing Receipt Affidavit

Receipts are required for expenses of \$50 or more. If you do not have a receipt, a missing receipt affidavit must be attached to the line item.

1. From your expense report, click **Receipts** > **Missing Receipt Affidavit**.
2. Select the expense for which you are missing a required receipt.
3. Review the attestation, then click **Accept & Create**.

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Submit an Expense Report

- This section covers submitting complete expense reports for approval, and correcting & resubmitting expense reports returned to you by your approver.


Submit Report

Submit a Completed Expense Report

1. When your expense report is complete, click **Submit Report**.
2. In the **Final Review** window, click **Accept & Submit**.

Resubmit a Corrected Expense Report

Your approver has the option to send a submitted report back to you for correction and resubmission.

1. Returned reports appear in the **Active Work** section of the **My Concur** page.
2. Use the blue comment icon to view your approver's comments. 
3. Click on the report name and make the necessary corrections.
4. **Save** your corrections, then click **Submit**.
5. In the **Final Review** window, click **Accept & Submit**.

Information for Approvers

- This section will be useful to individuals who are responsible for approving expense reports submitted by users in their department.

Send Back to Employee

Approve

Approve & Forward

Approve Submitted Expense Reports

1. Expense reports pending your approval appear in the **Approval Queue** section of the **My Concur** page.
2. Click on the name of the report you want to open. Review each line item for compliance and to ensure required receipts and itemizations have been provided.
3. Click **Print/Email** > **Princeton Allocation Report** to review allocation information.
4. After reviewing all items, click **Approve**.

Send an Expense Report Back to the Employee

1. From your **Approval Queue** on the **My Concur** page, click on the name of the report you want to open. Review each line item and allocation information.
2. If the report requires correction, click **Send Back to Employee**.
3. Use the **Comment** field in the **Send Back Report** window to explain the reason the report is being returned to the employee.
4. Click **OK**.

Approve and Forward an Expense Report for Additional Approval

You have the option to forward expense reports in your queue to additional approvers. This may be necessary for high dollar amounts or when expenses have been allocated to two departments. An authorized individual from each department should review and approve the charges.

1. From your **Approval Queue** on the **My Concur** page, click on the name of the report you want to open. Review each line item and allocation information.
2. If the report requires additional approval, click **Approve & Forward**.
3. In the **Approval Flow** window under **User-Added Approver**, search for the appropriate individual by name, email address, or PUID number.
4. Select the correct approver, then click **Approve**.

For further assistance:

- Contact the Financial Service Center if you require assistance with Concur Online, Finance and Treasury policy or procedure, or with your travel & expense credit card. Call 609-258-3080 (ext. 8-3080) or email finance@princeton.edu
- Contact Carlson Wagonlit Travel for questions specific to travel. Call 866-640-3294 (toll-free, 24/7/365 after-hours assistance) or 314-513-0801 (outside the US, collect calls accepted) or email princeton.us@contactcwt.com
- Contact Bank of America customer service if you require assistance with your travel & expense credit card outside of University business hours (lost/stolen cards, fraudulent activity). Call 888-449-2273 or 509-353-6656 (outside the US).