Request reimbursement in Concur
Concur Reimbursement Policy

Concur is the University’s travel and expense management tool. It is used by students, faculty, and staff to book travel, request reimbursement, and submit expenses.

For ODUS student groups:

- All receipts including expenses under $50 are required and must be itemized.
- Receipts should include vendors name, date, items purchased and the amount of purchase.
- The receipt amount must match the expense amount entered.
- Expense reports must be created and submitted within 2 weeks of the transaction date.
- Only the individual who incurred the out-of-pocket expense can submit a reimbursement request.
- If you have questions about using Concur, please contact the Financial Service Center at finance@princeton.edu or 609 258 3080.
Setting up your profile in Concur

Concur has a detailed help section that can assist you with any questions. In addition to the information contained there, please note the following:

- If you are **not** the treasurer of your group, your default approver must be your group’s treasurer.
- If you **are** the treasurer of your group, your default approver must be Manisha Chotalia (netID: chotalia) unless otherwise determined by ODUS.
- This is done in Concur in Profile>Profile Settings>Expense Settings>Expense Approver.
- Please do not add an expense delegate or travel arranger to your profile.

Request reimbursement in Concur
Uploading receipts to Concur

As you are incurring expenses on behalf of your group, you should also be collecting receipts in Concur. There are three ways to get receipts into Concur:

• Download the Concur app (start the process from your computer in the Concur profile setting) and take photos of your receipts with the camera function. They will automatically be added to Concur.
• After verifying your email address in your Concur profile, forward copies of your email receipts to receipts@concur.com. They will automatically be added to Concur.
• Upload receipts from your computer to Concur.

Request reimbursement in Concur
Preparing your expense report [1/4]

- Go to [www.princeton.edu/concur](http://www.princeton.edu/concur)
- Click the Expense tab at the top of the screen
- Click the Create New Report Tile
Preparation your expense report [2/4]

Fill in the Report Header Information

- Report Name should include your group name, descriptive title of item or event and the event date (ex: “ODUS Spring Show, 4/7/18”).
- Report Date: Leave as is.
- Business Purpose: Summarize the items you purchased and the reason you purchased them (ex: “Refreshments & decorations for ODUS holiday party”). This will show in the ledger detail report in Concur along with the payee and vendor names.
- Department: This your group’s five-digit department number. If you do not know it, please contact your group’s treasurer.
- Fund: This is a five-character alphanumeric code that reflects where group has funds. If you do not know which code to use, please contact your group’s treasurer.
- Click “Next”.

Request reimbursement in Concur
Preparing your expense report [3/4]

Add Expenses

- Select an expense type from the menu on the right hand side of the screen (note: do not select “Miscellaneous”; “Project Materials” is often a more appropriate option for student groups)
- Enter required information including Vendor Name
- Business Purpose: Use this field including event and items purchased to enter more specific information than what was entered in the Report Header (ex: “Streamers & lights for ODUS holiday party”)
- Trip ID: Leave blank
- Comment: If more information or an explanation is needed, include here
- Group meals only for meals eaten at a restaurant, please note the following:
  - Food receipts must detail items purchased, not just the total and tip paid receipt.
  - If you brought the food to campus or it was delivered to campus, select Catering (not Group Meals).
  - If you dined at a restaurant, select Group Meals/Entertainment <10 attendees or 10+ attendees.
- If prompted, itemize your expense → look at your receipt and fill in the various amounts that contributed to the total
- Click “Save”
- Click “Attach Receipt” at the bottom of the screen
  - Upload an image or retrieve from your available receipts
  - Click “Attach”
Preparing your expense report [4/4]

Repeat the previous step for all expenses in your report, then click “Submit Report” in the upper right hand corner.
Tracking & receiving your reimbursement

Once you have submitted an expense report, you can track its process by:

- Clicking the Expense tab.

- Tiles for reports you have submitted will be green or red. At the bottom of the tile, there will be information about where the report is in the approval process (ex: “Pending Cost Object Approval,” “In Accounting Review,” “Returned,” etc.)

- If the report has been paid, it will move to your “Report Library”. Click on the Report Library link on the right side of the Manage Expenses page. This past reports were extracted for payment.

When your reimbursement has been approved by the Office of Finance & Treasury, you will receive it in one of two ways:

- If you are signed up for direct deposit, the money will be deposited to your bank account.

- If you are not signed up for direct deposit, you will receive an email from Princeton letting you know that you have a check ready for pickup at the Financial Service Center on the 7th Floor of New South.
Concur videos

In addition to the information contained here, Concur has created a series of videos to guide you through the process.

Creating a New Expense Report
Working with the Receipt Store
Adding an Out-of-Pocket Expense to an Expense Report
Adding Attendees to a Meal
Allocating Expenses
Correcting and Resubmitting an Expense Report
Reviewing and Approving an Expense Report