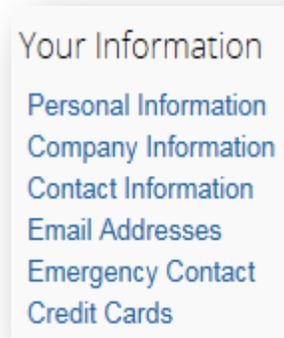
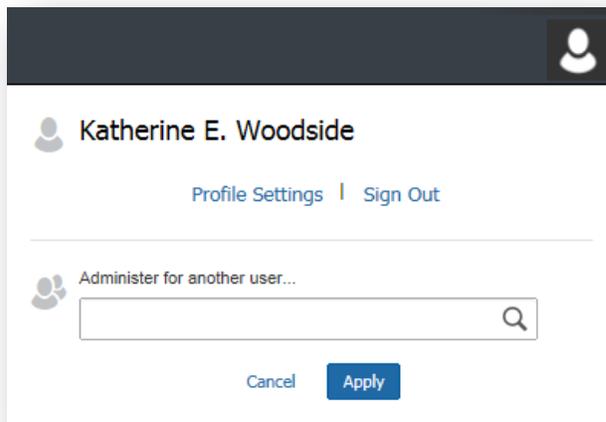


Setting up your Concur Profile

Step-by-step instructions can be found on the [Concur Getting Started webpage](#) (you will be required to enter your NetID and password to access the instructions). It is important that you complete this setup prior to booking travel and before submitting any expense reimbursement requests.

Please Login to Concur <http://www.princeton.edu/concur/> and proceed to Profile>Profile Settings:



Your Information:

Email Addresses

1. Please **verify** your email address so that you may email receipts directly to Concur.

Expense Settings:

Expense Approvers –

1. **Expense Approvers** on the left hand side under “Expense Settings”.
2. Type **Joanne Krzywulak** to search and select from the dropdown list.
3. Click **Save**.

Expense Delegates –

1. From the **Profile** tab, click **Expense Delegates**.
2. Click **Add**.
3. Type **Joanne Krzywulak** in to search, and select from the dropdown list.
4. Check off “Can Prepare” and “Can View Receipts”.
5. Click **Save**.

Expense Information –

1. Please fill in **Department 26028**, **Fund A0001** and **Program AC602** fields
2. Click **Save**.

Mobile App/Mobile Registration—

SET UP PIN FOR MOBILE

To log in to Concur on your mobile device or Concur Connect application, you must enter your User Name and a PIN.

Enter a new PIN in the fields below to setup a new one.

Concur Username: [REDACTED]@princeton.edu

Create PIN: PIN may be letters, numbers and special characters such as

Retype PIN: !, \$, or # but no spaces

Set PIN

1. Create a PIN to go with your Concur Username (your Princeton email)
2. Download the Concur app in your phone's App store
3. Use your Concur Username and PIN to login on your phone
4. Use the Camera button on the Concur App to take pictures of receipts that will load directly into Concur

Submitting an Expense Report in Concur

www.princeton.edu/concur

To start a new expense report Click on Expense>Create New Report. And fill in the fields with the red vertical line next to them:

The Report Name can be anything that will help you remember what this group of expenses is for, please also add the **Business purpose** of the purchase (why this purchase was made as you would explain it to someone outside the program). Please leave blank the following fields: Trip ID, Comment, Site, Project, Activity. Then click Next at the bottom right on the screen.

For Reimbursements: In the Expense Report screen you will Click “**New Expense**” and then choose an expense category for each transaction you need to be reimbursed for.

For each expense, please click on the **expense category title** (e.g. Books & Periodicals) from the left side menu, then fill in the Right side boxes that are marked with a red vertical bar and then hit save at the bottom:

Please make sure to change the **Business Purpose** when needed.

Receipts: the GPO requires an *itemized* receipt for all transactions, which lists all of the items purchased and the price.

If you have access to a scanner, please email your receipts as attachments to receipts@concur.com with your email address as the Subject of the email. Make sure that you have verified your email address in your profile, so that concur can add these receipts to your receipt store.

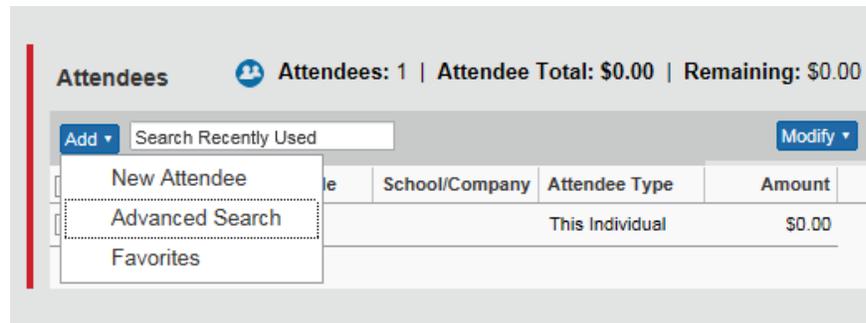
Receipts can also be uploaded from your computer or added from a Smartphone using the **Concur Mobile App** (click on Expense>Mobile Registration to set this up)

To Attach a receipt to a transaction: hit the Attach Receipt button at the bottom of the right side pane,



 OR if you have emailed your receipts to receipts@concur.com click the Available Receipts button at the top right. Attach the appropriate receipt (the receipt store has +/- to allow you to zoom in on receipts) to the expense. Click on the green paper icon to attach the receipt to the selected expense:

Meals should be marked either Catering or Group Meal (less than 10 or greater than 10). Please list the Attendees of a Group Meal by clicking the Add or New Attendee Button and adding each attendee:



If a report has red flags  or yellow flags  please click on the transaction category (e.g. Group Meal) to see the exception. Some expense types may require you to add a comment or additional information.

Once you have added all your transactions and attached receipts, please submit the report by hitting the “Submit Report” on the top right of the screen. This will forward the report to your designated approver and any other approvers required based on the Department your Chart String is charging.



More Info on Concur: For more information and training on Concur, please visit our Travel Website: <https://travel.princeton.edu/faculty-staff/training>