Creating and Reconciling Expenses in SAP Concur

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Prior to creating your expense report, please obtain the chartstring that should be used for your expenses. Please contact Anna Valerio (apval@princeton.edu). A chartstring consists of a Department code – Fund code – Program code or Project and Activity. A single expense report can contain multiple chartstrings, trips, and expenses. Additionally, one expense/transaction can be charged to one or more chartstrings. Expenses must be submitted within 30 days of a transaction.

You need receipts for any transactions totaling $50.00 or more. You will need a digital version of your printed receipt (pdf or jpeg). Scan and email your receipt to yourself.

Creating Your Expense Report

1. To create your expense report in Concur, open your Concur profile and click on "Expense" at the top of the page.
2. Click on the box "Create New Report". This will open a new expense report for you.
3. The report name should be listed as "Last Name – City, State or Country, if international (you have traveled to or are traveling to). **For example, "Valerio – Chicago, IL**"
4. The report date can be left unchanged
5. Report type: If your expenses are all from primarily abroad, select "International" if the expenses are from local or US travel, keep it on "Domestic," which is the default.
6. Business Purpose, enter what the expense is. **For example, "AGU Fall meeting"**
7. Department: Please enter department # **24500 (AOS)**.
8. Fund: should be G0001 unless otherwise indicated
9. Project: will be the grant number
10. Activity will be 101
11. Click on "Next"

For all expenses $50 and over, you must attach an itemized receipt. Click on the "Attach Receipt" button at the bottom righthand corner. Select your receipt either from your files, or from your saved Concur receipts. For restaurant bills, if a tip was added, attach both the itemized receipt and the charge slip that shows the handwritten tip and total.

12. Add new expense by selecting an expense type from the options on right. **For example, "Fees"** and select Conference Registration. Fill in the required fields (indicated in red). Also, add comment specifying what the expense type is for. **For example,** abstract fee
13. Once all expenses have been added, you are ready to submit your report. Click the red "Submit Report" in the upper right corner. Confirm the submission.
14. If you receive a notice that an approver is needed, follow the instructions below:

Directions for Setting up an Approver and Submitting an Expense Report

- Go to the upper right corner and pull down the "Profile" menu.
- Select "Profile Settings"
- Under Profile Settings, on the left navigation column, under "Expense Settings," select Expense Approvers.
- Type in **lrossi** into the first box that is for "Default approver for your expense reports," which should populate. Select Laura Rossi and save.
- To get back to your expense report, click on Expense at the top of the page. Open your report and submit report.