

Using Coupa for Faculty Expenses

Getting access to Coupa/MarketPlace +

Please see Lauren Hasselriis-Ghom (for ug Business and IBS) or Leslie Yancich (for ug Economics) to first get access to the system. We have to request that through the Procurement Department.

Logging in

Once you have access, go to this link: <https://brandeis.coupahost.com> and click "Expense" in the upper left corner. Then click "Create" to create an expense report OR use the Coupa app on your phone. (Instructions for installing the app are at the end of this email.)

Follow these guidelines when completing the fields in an expense report:

Report Title - (This is important! List the trip purpose, research project, or event that generally explains all of the expenses for this report.)

Separately list each transaction by receipt or day if it's a per diem or mileage expense.

NOTE: You must attach a receipt for each line-item (either scan it to your computer and upload it, or take a photo with the Coupa app from your phone.)

Description - This should be the same as the Merchant (or say Mileage or Per Diem)

Expense Date - Enter the date. List separate transactions for each per diem.

Expense Category - This is sometimes tricky, but choose what most makes sense; this helps inform the account code.

Business Purpose - This is very important and only you, the originator of the expense, knows what it should be. Indicate if an expense is research related, or should be charged to a special account with prior approval – Development, Dean's Office, etc. This helps inform the entire chart string (charge line).

Merchant - Enter the name of the merchant.

Account - This should auto-populate, but even if it doesn't, with the business purpose listed above, the approval chain (Eliza, Lauren, or Kathleen for UG Bus and IBS, Leslie for UG Economics) can fill in the appropriate account information.

Important: *If you are submitting a reimbursement for a meal, you will have to specify whether alcohol was purchased or not. If the former, then enter the expense for the food in the current line item and the alcohol expense in a separate line item.*