

## Section 1: Getting Started

Log on to Concur Expense

1. To file a Table Talk expense report, access <http://travel.nd.edu> and login using your NetID and password.

The screenshot shows the travelND website interface. At the top, the navigation bar includes the University of Notre Dame logo, the text "travelND", and the tagline "Simple > Smart > Swift > Service". To the right of the navigation bar is a search box with a "SEARCH" button. Below the navigation bar, there is a left-hand menu with links for "Travel Bookings - How To", "Expense Reports - How To", "Travel Contracts", "Travel Card", "News", "Useful Travel Links", and "Contact Us". The main content area features a navigation menu with four buttons: "New User?", "Before You Book", "After You Travel", and "Contact Anthony Travel". To the right of this menu is a "Book Travel & File Expenses" login form with a text input field containing "snugent", a password field with masked characters, and a "LOGIN" button. Below the login form is a large promotional banner for a contest. The banner text reads: "WIN 2 FREE AIRLINE TICKETS! Book reservations in Concur by Dec 31<sup>st</sup> for a chance to win\*". A link "Read the prize drawing rules." is provided. Below the banner, there is a section for "Announcements" with two items: "Win 2 Free Airline Tickets!" and "Enhancements to UND Detailed Report". The bottom of the page shows the Windows taskbar with the system tray displaying "Internet | Protected Mode: On" and the time "2:10 PM".

## Section 2: Create a New Report

1. Click on Expense
2. Click on the down arrow on the "Create & Edit" tab
3. Click on "Create Expense Report"

The screenshot shows the Concur Expense Center interface. The user is logged in as Susan Nugent. The main navigation tabs are My Concur, Travel, Expense, and Profile. The 'Expense' tab is active, and the 'View Reports' section is displayed. The 'Active Reports' list is shown with columns for Report ID, Description, Comments, Status, Payment Status, Report Date, Total, and Requested Amount. A dropdown menu is open under the 'Create & Edit' tab, showing options for 'Expense Report' (with a sub-option 'Create Expense Report') and 'Travel Allowances' (with sub-options 'Create Itinerary' and 'Edit Itinerary').

Report ID	Description	Comments	Status	Payment Status	Report Date	Total	Requested Amount
	<b>Expense Report</b>						
	Create Expense Report		Not Submitted	Not Paid	11/03/2011	\$0.00	\$0.00
	<b>Travel Allowances</b>						
	Create Itinerary		Not Submitted	Not Paid	11/03/2011	\$100.00	\$100.00
	Edit Itinerary	exceptions.					
	table talk demo dinner with student		Not Submitted	Not Paid	10/06/2011	\$12,000.00	\$12,000.00

This report has one or more entry level exceptions.

### Section 3: Report Header

1. Fill out all red lined boxes
2. Report name example: Your Name Table Talk
3. Business purpose example: Dinner with Students
4. The Fund, Organization, and Program numbers DO NOT need to be changed. I will change them to Table Talk when I receive the report.
5. Then click "Next"

Expense Center - Susan Kim Nugent - Windows Internet Explorer  
https://www.concursolutions.com/expense/client/default.asp#ReportList

Welcome, Susan Nugent [ You are administering for: Yourself ]

Concur® travelND

My Concur Travel Expense Profile

View Reports New Expense Report View Receipt Store Approve Reports View Cash Advances New Cash Advance

### Create a New Expense Report

#### Report Header

Report Name	Report Date 11/03/2011	Policy UND Expense Policy	Business Purpose	Charging Restricted/Grant Funds on this report?	Fund (100000) Educational and General
Organization (30126) Office of A&L Undergrad S	Program (10) Instruction	Activity	Location	Comment	<input type="checkbox"/> Check if report is for Non-ND Guest/Visitor
Currency Option for Non-ND Guest/Visitor Check-US Dollar (preferred; USD)					

Next >> Cancel

Done Internet | Protected Mode: On 100% 1:56 PM

## Section 4: New Expense

1. In the right hand box, scroll until you find "Meals & Entertainment"
2. Click on "Entertainment-Food (72454)"

Expense Center - Susan Kim Nugent - Windows Internet Explorer

https://www.concursolutions.com/expense/client/default.asp#ReportList

Welcome, Susan Nugent [ You are administering for: Yourself ]

Concur® travelND

My Concur Travel Expense Profile

View Reports **New Expense Report** View Receipt Store Approve Reports View Cash Advances New Cash Advance

Susan Nugent Table Talk Delete Report Submit Report

New Expense Import Details Receipts Print / Email

Expenses Delete Copy View << **New Expense** Receipt Store

Date	Expense Type	Amount	Requested
Adding New Expense			
TOTAL AMOUNT		\$0.00	TOTAL REQUESTED
		\$0.00	\$0.00

Expense Type

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

- Meals & Entertainment
  - Employee Meals (72192)
  - Entertainment-Beverage/Alcohol (72451)
  - Entertainment-Clubs & Organizations (72452)
  - Entertainment-Event Tickets (72453)
  - Entertainment-Flowers (72455)
  - Entertainment-Food (72454)
  - Entertainment-General (72450)
  - Food-Groceries (74109)
  - Food-Office/Dept (72191)
- Media Services
  - Advertising (71171)
  - Binding (71172)
  - Duplicating/Copying (71179)
- Express Mail (71211)
- Postage (71212)
- Professional Fees
  - Allowance-Moving (71264)
  - Lectures (71253)
  - Medical Fees (71255)
  - Professional-Other (71269)
- Telecommunications
  - Telecommunications-Cellular Line (71290)
  - Telecommunications-Data Line (71292)
  - Telecommunications-Internet (71293)
  - Telecommunications-Pay Phones (71296)
  - Telecommunications-Toll (71297)
  - Telecommunications-Videoconferencing (71301)

Internet | Protected Mode: On 1:58 PM 11/3/2011

## Section 5: Expense Type

1. Fill out all red lined boxes
2. You do not need to add your student's names to the attendees box.
3. After you've filled out the fields, click on "Attach Receipt". Prior to attaching your receipt, you'll have to scan your receipts and save them on your computer.
4. Please make sure to click on a new expense for every receipt you have from different vendors. Example, if you have 1 receipt from Martin's and 1 receipt from Sam's Club, each transaction will require you to repeat steps 1 through 3.

Expense Center - Susan Kim Nugent - Windows Internet Explorer

https://www.concursolutions.com/expense/client/default.asp#ReportList

Welcome, Susan Nugent [ You are administering for: Yourself ]

My Concur Travel Expense Profile

View Reports **New Expense Report** View Receipt Store Approve Reports View Cash Advances New Cash Advance

**Susan Nugent Table Talk** Delete Report Submit Report

New Expense Import Details Receipts Print / Email

**Expenses** Adding New Expense

**New Expense** Receipt Store

Expense Type: Entertainment-Food (72454) Transaction Date: 11/01/2011 Business Purpose: Dinner with Students Vendor Name: Martin's

City: South Bend, Indiana Payment Type: Cash Amount: 50.00 USD Non-reimbursable Expense:

Comment:

**Attendees** Attendees: 1 | Attendee Total: \$50.00 | Remaining: \$0.00

Attendee Name	Attendee Title	Company	Attendee Type	Attendee Count	Amount
<input type="checkbox"/> Nugent, Susan	Sr. Administrativ...	UND	Employee	1	\$50.00

TOTAL AMOUNT: \$0.00 TOTAL REQUESTED: \$0.00

Save Itemize Allocate Attach Receipt Cancel

Internet | Protected Mode: On 1:59 PM 11/3/2011

## Section 6: Approval Flow

1. Click on the down arrow next to "Details".
2. Then click on "Approval Flow".

The screenshot displays the Concur Expense Center interface. At the top, the user is logged in as Susan Nugent. The main navigation bar includes 'My Concur', 'Travel', 'Expense', and 'Profile'. Below this, there are links for 'View Reports', 'New Expense Report', 'View Receipt Store', 'Approve Reports', 'View Cash Advances', and 'New Cash Advance'. The 'Susan Nugent Table Talk' section is active, showing a 'New Expense' form. The 'Details' dropdown menu is open, and 'Approval Flow' is selected. The form includes fields for 'Expense Type', 'Amount', and 'Requested', with a total amount of \$50.00. A list of expense types is visible, including 'Meals & Entertainment', 'Entertainment-Beverage/Alcohol (72451)', and 'Express Mail (71211)'. The Windows taskbar at the bottom shows the system time as 2:00 PM on 11/3/2011.

Expense Center - Susan Kim Nugent - Windows Internet Explorer  
https://www.concursolutions.com/expense/client/default.asp#ReportList

Welcome, Susan Nugent [ You are administering for: Yourself ]

Concur® travelND

My Concur Travel Expense Profile

View Reports **New Expense Report** View Receipt Store Approve Reports View Cash Advances New Cash Advance

Susan Nugent Table Talk Delete Report Submit Report

New Expense Import Details Receipts Print / Email Hide Exceptions

**Exceptions**

Expense Type	Date
Entertainment...	11/01/2011

**Expenses**

Date	Expense
11/01/2011	Entertain Martin's

**Report**

- Report Header
- Totals
- Audit Trail
- Approval Flow
- Comments

**Cash Advances**

- Available
- Assigned

**Allocations**

- Allocations

**Travel Allowances**

- New Itinerary
- Available Itineraries
- Expenses & Adjustments

**New Expense**

Expense Type

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

Meals & Entertainment	Express Mail (71211)
Employee Meals (72192)	Postage (71212)
Entertainment-Beverage/Alcohol (72451)	Professional Fees
Entertainment-Clubs & Organizations (72452)	Allowance-Moving (71264)
Entertainment-Event Tickets (72453)	Lectures (71253)
Entertainment-Flowers (72455)	Medical Fees (71255)
Entertainment-Food (72454)	Professional-Other (71269)
Entertainment-General (72450)	Telecommunications
Food-Groceries (74109)	Telecommunications-Cellular Line (71290)

TOTAL AMOUNT \$50.00 TOTAL REQUESTED \$50.00

Internet | Protected Mode: On 100% 2:00 PM 11/3/2011

## Section 6: Manager Approval

1. Add my name, Brenda Teshka to the “Manager Approval” field.
2. Once you’ve completed your report, you can click on “Submit Report”. If you need to add some additional information, then you can click “Save Workflow” and return to your report. Once you’ve finished your report, you can click “Submit Report” in the upper right hand corner. You should have your money deposited into your account within 3 business days. If you do not see if, please call 1-9468.

Expense Center - Susan Kim Nugent - Windows Internet Explorer

https://www.concursolutions.com/expense/client/default.asp#ReportList

File Edit View Favorites Tools Help

Convert Select

Favorites Mama's Potato Salad - Ea... Suggested Sites Web Slice Gallery

Expense Center - Susan Kim Nugent

Welcome, Susan Nugent [You are administering for: Yourself]

Concur travelND

My Concur Travel Expense Profile

View Reports New Expense Report View Receipt Store Approve Report

Susan Nugent Table Talk

New Expense Import Details Receipts Print / En

Exceptions

Expense Type	Date	Amount	Exception
Entertainment-...	11/01/2011	\$50.00	If alcohol was a part of this

Expenses

Date	Expense Type	Amount
11/01/2011	Entertainment-Food (72454) Martin's, South Bend, Indiana	\$50

TOTAL AMOUNT \$50.00

TOTAL REQUESTED \$50.00

Entertainment-Food (72454)

Entertainment-General (72450)

Food-Groceries (74109)

Professional-Other (71269)

Telecommunications

Telecommunications-Cellular Line (71290)

Approval Flow for Report: Susan Nugent Table Talk

Manager Approval:

Back Office Approval:

Submit Report Save Workflow Cancel

Internet | Protected Mode: On

2:01 PM 11/3/2011