

## 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 browser title is "TravelND // University of Notre Dame - Windows Internet Explorer" and the address bar shows "https://travel.nd.edu/". The website header includes "UNIVERSITY of NOTRE DAME" and "PROCUREMENT SERVICES". The main navigation bar features the "travelND" logo and the slogan "Simple > Smart > Swift > Service". A search bar is located on the right side of the header.

The left sidebar contains a menu with the following items: "Travel Bookings - How To", "Expense Reports - How To", "Travel Contracts", "Travel Card", "News", "Useful Travel Links", and "Contact Us". Below this menu are sections for "Training Class" (with a "Read more" link) and "Certified travelND Specialists" (with a "Read more" link).

The main content area features a navigation bar with four buttons: "New User?", "Before You Book", "After You Travel", and "Contact Anthony Travel". To the right of this bar 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.

The central promotional banner reads "WIN 2 FREE AIRLINE TICKETS!" in large red letters. Below this, it says "Book reservations in Concur by Dec 31<sup>st</sup> for a chance to win\*". A link "Read the prize drawing rules." is provided. At the bottom of the banner, it says "\*See prize drawing rules".

Below the banner is an "Announcements" section with two items: "Win 2 Free Airline Tickets!" and "Enhancements to UND Detailed Report".

The bottom of the browser window shows the taskbar with the "Done" label, the system tray with "Internet | Protected Mode: On", "100%", and "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"

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

Expenses 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 Reports View Cash Advances New Cash Advance

Expense Report List

Active Reports Delete Report

View Create & Edit Import

Re	Expense Report	Comments	Status	Payment Status	Report Date	Total	Requested Amount
<input type="checkbox"/>	Create Expense Report		Not Submitted	Not Paid	11/03/2011	\$0.00	\$0.00
<input type="checkbox"/>	Travel Allowances		Not Submitted	Not Paid	11/03/2011	\$100.00	\$100.00
<input type="checkbox"/>	table talk demo dinner with student	exceptions.	Not Submitted	Not Paid	10/06/2011	\$12,000.00	\$12,000.00

This report has one or more entry level exceptions.

Internet | Protected Mode: On 100%

1:55 PM 11/3/2011

### 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
5. Then click "Next"

The screenshot shows the SAP Concur interface for creating a new expense report. The 'Report Header' section is highlighted with red lines around the input fields. The fields are as follows:

Field	Value
Report Name	[Red lined]
Report Date	05/02/2018
Policy	LND Expense Policy
Business Purpose	[Red lined]
Fund	1100000 Educational and Ge
Organization	30126 Office of ASL Under
Program	110000 Instruction
Activity	[Red lined]
Location	[Red lined]
Comment	[Red lined]

At the bottom right of the form, there is a blue button labeled 'Next >>' and a 'Cancel' link.

## 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

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 ] Help Log Out

**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	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-Videconferencing (71301)

Internet | Protected Mode: On 100% 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
4. Please make sure to click on a new expense for every receipt you have from different vendors. Example, if you have 1 Martin's and 1 receipt from Sam's Club, each transaction will require you to repeat steps 1 through 3.

The screenshot displays the Concur Expense Center interface. The main heading is "Susan Nugent Table Talk". The "New Expense" form is filled out with the following details:

- 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: (empty)

The "Attendees" section shows one attendee:

Attendee Name	Attendee Title	Company	Attendee Type	Attendee Count	Amount
Nugent, Susan	Sr. Administrativ...	UND	Employee	1	\$50.00

Summary statistics at the bottom of the form:

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

Buttons at the bottom include: Save, Itemize, Allocate, Attach Receipt, and Cancel.

## Section 6: Approval Flow

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

The screenshot shows the Concur Expense Center interface in Internet Explorer. The user is Susan Kim Nugent, administering for herself. The main report is titled "Susan Nugent Table Talk" with a total amount of \$50.00 and a total requested amount of \$50.00. The "Details" dropdown menu is open, showing options such as Report Header, Totals, Audit Trail, Approval Flow, Comments, Cash Advances, Allocations, and Travel Allowances. The "Approval Flow" option is highlighted. The "New Expense" section is also visible, showing a list of expense types including Meals & Entertainment, Employee Meals, Entertainment-Beverage/Alcohol, etc.

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	Amount	Requested
11/01/2011	Entertain Martin's	\$50.00	\$50.00

TOTAL AMOUNT: \$50.00 TOTAL REQUESTED: \$50.00

**New Expense** Receipt Store

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)

## Section 7: 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

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

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 / Export

#### 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)

Internet | Protected Mode: On