Navigating in travelND

1. The Concur User Experience allows for effortless navigation and access to features while providing maximum benefits for your travel and expense needs.

2. Most screens will be available directly from the home page.

3. **User Profile:** The user profile area is where you go to find such tasks as adjusting your preferences and signing out of the system. Those with administrative privileges can use this area to log in on behalf of others for Delegate, Proxy, or Travel Arranger tasks.

4. **Quick Task bar:** Your most common tasks and outstanding "to do" items are now available at-a-glance. With one click, you can create a new expense report or travel request, approve a trip, or quickly jump to areas needing your attention. It also includes the count of associated tasks. You simply click a task for quick access to the associated page.

5. Hover your mouse pointer over **New** to start a new report, new cash advance, new reservation, etc.

6. **My Trips:** View your upcoming trips, view the related details, and get notifications when there are any changes to your itinerary. You can click the **My Trips** heading name to access your **Trip Library**, click the trip name to access a printable version of the itinerary, click the segment icon to access an actionable version of the itinerary, or click **More** to access the menu.

7. **My Tasks:** Get up-to-speed quickly on all your most pressing work items, and make quick, informed decisions. You can click a heading or group to access more information or click on an individual item to open it.

8. **Expense:** Working with your reports has never been easier. Now you can view all your available expenses and open reports from one place, create a new expense report with one click, and easily monitor its progress.

9. **Active Reports:** Your active reports are shown as tiles with the name, amount, status, and comments appearing for each tile. To the right of the tiles is the **All Reports Link**. You can click this link to see all reports- active, paid, etc. To create a new report, click **Create New Report**.

10. All available expenses are grouped together so you can easily see what items need to be expensed.
Navigating (cont.)

11. All receipt images are available for you to quickly view and manage. You can zoom and rotate a receipt image, upload a new image, and attach an image to an expense report.

12. Approvals: The new approvals page contains all items that require your approval, such as trips, requests, reports, and cash advances. You can click a tab to quickly access each type of item that requires approval or click an individual item to open it. You can also click the check box for an item and click Approve.

13. Menus: You have different options under each menu.

14. Travel Menu:

15. Expense Menu:

16. Approvals Menu:

Administering for Another User

1. To administer for another user as an Expense Delegate or Travel Arranger, click on your Profile.

2. If you are an Expense Delegate and have 10 or less users, click on the drop-down arrow, and select the appropriate individual. If you have more than 10, enter the first few letters of the user’s name, and select from the search results. Click Apply.

3. Your profile menu will now become Administer for <name>, and the single user icon becomes a double user icon.

4. To return to your own session, click on End admin session under the profile.

Questions?
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