

travelIND Newsletter

As a travelIND user, you are receiving this email to keep you up-to-date on the travelIND tool.

travelIND/Concur New User Interface Preview

As announced in the April newsletter, a new look to travelIND/Concur home page and expense reporting is coming in September, 2022.

travelIND/Concur Expense Report Changes:

New Report and New Expenses – The functionality is the same when creating an expense report. When you create a new expense report, you start with the report header and then move to the expense page to add the expenses and attach any required receipt images.

Though this basic process has not changed, the pages are more streamlined and easier to manage. In the new user experience, when working with expenses:

- The report header page fields are larger and easier to navigate. Please note, the field names and functionality is exactly the same as our current header fields.
- Required fields are now marked with a red asterisk instead of a red band at the left edge of the field.

Create New Report

- The report page is cleaner and has fewer "sections" - making the page easier to navigate.

Alerts: 8

Concur Test \$1,215.98

Not Submitted

Report Details | Print/Share | Manage Receipts | Travel Allowance

Add Expense | Edit | Delete | Copy | Allocate | Combine Expenses | Move to

<input type="checkbox"/>	Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested
<input type="checkbox"/>			Cash	Entertainment-General (72450) Attendees (1)	test South Bend, Indiana	07/06/2022	\$22.00	\$22.00
<input type="checkbox"/>			Cash	Meals-Domestic-Breakfast, Lunch, Dinner (77060)	test South Bend, Indiana	07/06/2022	\$20.00	\$20.00
<input type="checkbox"/>			Cash	Gifts (72503)	test South Bend, Indiana	08/16/2022	\$100.00	\$100.00
<input type="checkbox"/>			Cash	Conference Fees - Domestic (77020)	ABC South Bend, Indiana	06/01/2022	\$600.00	\$600.00
<input type="checkbox"/>			Cash	Airfare & Related Fees-Foreign (77510)	Air Canada London, Ontario	06/01/2022	CAD 600.00	\$473.98
							\$1,215.98	\$1,215.98

Adding Expenses:

To get started, click Add Expense. The Add Expense window appears; all of the options for adding expenses to the report are available in this window. The default choice is to add items from your Available Expenses library, to encourage you to use those expenses first before creating a new expense – which helps reduce duplicate entries. To create an out-of-pocket expense line, you will choose "create new expense" tab. As usual, you will search for the expense type, select it from the list, fill in the required fields for that expense.

Allocate and Itemize Options:

The options to allocate a single expense or multiple expenses at the same time are still available in the new user experience. You will see a pop-out box when you click on the allocate icon.

Expenses: 1 | \$100.00

Percent | Amount

Amount: \$100.00 | Allocated \$100.00 (100%) | Remaining \$0.00 (0%)

Code: 100000-56000-70000

Add | Edit | Remove | Save as Favorite

The option to itemize a specific expense is available when you click on the Itemization tab within the expense line.

Amount: \$100.00 | Itemized: \$0.00 | Remaining: \$100.00

Create Itemization | More Actions

Receipts:

Receipts can still be added to your report at the report level by clicking "Manage Receipts" menu and uploading your receipts. Receipts can still be added to each expense line as well.

An enhancement available in the new expense user experience, you can attach one receipt image to more than one expense on the same expense report. You can also attach multiple receipts to one expense line by using the "Append" option in the receipt window.

2/6/2006
Trans.: 4793
Register: 002
Team Member: Margaret P.

4:37:08 PM EST
Branch: 1122
T111:039243

SALE



Fax - Receive		14.00 T
0716	14.00 @ 1.0000	
Sub-Total		14.00
Deposit		0.00
Tax		1.17
Total		15.17
Cash		20.00
Total Tender		20.00

copies or postage.JPG

Detach

Append

New UI Webpage:

Please visit our [web page](#) dedicated to the new user experience. You can read more about the upcoming changes and view our quick reference guides and videos.

We will be offering demo training sessions on the new user experience in August. Those dates will be listed on our web page in the near future.



Procurement Services
travel@nd.edu
574-631-4289

[Manage](#) your preferences | [Opt Out](#) using TrueRemove™
Got this as a forward? [Sign up](#) to receive our future emails.

View this email [online](#).

709 Grace Hall None | Notre Dame, IN 46556 US

This email was sent to .
To continue receiving our emails, add us to your address book.

[Subscribe](#) to our email list.