

# eTER Step-by-Step Guide

## Traveler attends TRB meeting and receives:

- *Filing Your Expense Report for Out-Of-Pocket Expenses*



## Traveler Logs onto eTER system

- Login [www.concursolutions.com](http://www.concursolutions.com)
- Use **ID** and **Password** listed on the *Filing Your Expense Report for Out-Of-Pocket Expenses Memo*



## Traveler Delegates Authority

- Click on **Profile** (third tab underneath Concur logo) and click on **Expense Delegates**
- Add email addresses for delegates: [lwilliams@nas.edu](mailto:lwilliams@nas.edu)
- Click **Save**



## Create New Expense Report

- Go to the **Expense** (second tab underneath Concur logo) and click on **New Expense Report** (you may see other reports listed. These are expense reports previously created)
- Follow instructions on the *Creating a New Expense Report* handout
- Click **Next**



## Create Travel Itinerary

- Enter departure and arrival information (City, Date and Time) to get to the meeting
- Click **Save**
- Enter departure and arrival information (City, Date and Time) to return home
- Click **Next**
- Click **Done** to proceed



## Enter Mileage

- Click on **Mileage**
- Enter data in fields marked with red
- Use **Mileage Calculator** to figure out miles
- Click **Save**



## Enter Car Rental Expenses (**Skip if Paid by NAS**)

- Select **Car Rental** as Expense Type
- Enter **Transaction Date**. The date the car was returned
- Enter **Vendor, City** and **Amount**
- Click **Save**



## Enter Airfare/Train Expenses (**Skip if Paid by NAS**)

- Select **Airfare** or **Train Fare** as Expense Type
- Enter **Transaction Date** (date ticket was issued)
- Enter **Vendor, Class of Service, Departure City, Arrival City** and **Amount**
- Check **Round Trip** or **One-Way**
- Click **Save**



## Enter Hotel Expenses (**Skip if Paid by NAS**)

- Select **Hotel** as Expense Type
- Enter **Transaction Date**. The date the bill was paid (usually the check-out date)
- Enter **Vendor, City** and **Amount** (Total)
- Check **Travel Allowance**
- Click **Itemize**
- Enter **Number of Nights** stayed, **Room Rate** and **Room Tax**
- Click **Save**



## Enter Out-of-Pocket Per Diem Expenses

- Select Expense type listed (i.e. Breakfast)
- Enter **Transaction Date**
- Enter **Amount**. DO NOT use dollar signs (\$). If paid in foreign currency, select currency
- Enter **Comments** to explain any exceptions
- Check **Travel Allowance** for per diem expenses
- Click **Save**



## Attach Receipts

### Scanned Copies

- Click on **Receipts** → **Attach Receipts Image**
- Locate scanned image through **Browse** then **Open, Attach** and click **Done Send by Fax**
- Click **Print** → **NAS Fax Receipt Cover Page**
- Print and Fax to telephone listed



## Travel Deviations

- Travel deviations should be noted in **Details** → **Report Header** → **Comments** box
- constructive cost quotes and other explanations should also be attached along with receipts



## Complete the Process

- Click **Details** → **Report Header**
- Check the **Traveler Entry Complete** box at the top
- Click **Save** and you are **DONE**
- **DO NOT** click on **SUBMIT** (NAS use only).



## View Expense Report (For your record)

- To view your total reimbursement amount, click **Print** → **NAS Detailed Report**

## For Assistance

Training Materials Online

<http://www.trb.org/NCHRP/CRPInfoPanelMembers.aspx>

Contact

NAS Travel office: (202) 334-2662 (TravelOffice@nas.edu)