

# eTER Step-by-Step Guide

Traveler attends TRB meeting and receives:

- *Filing Your Expense Report for Out-Of-Pocket Expenses*
- *Creating a New Expense Report*
- *Travel Expense Report Process as of July 12, 2010*

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 two delegates: (1) [dsomerset@nas.edu](mailto:dsomerset@nas.edu) and (2) travel coordinator email as listed on the *Filing Your Expense Report for Out-Of-Pocket Expenses Memo*
- Click Save

For pre-populated eTERs, skip ahead

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

- DO NOT click on SUBMIT (NAS use only).
- Email your travel coordinator
- You are DONE

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](mailto:TravelOffice@nas.edu)) or  
 CRP Travel Accounting (202) 334-2846 ([CRPTravel@nas.edu](mailto:CRPTravel@nas.edu))