

2012

TTE FAQ Spotlight – August



Top 5 Support Questions Last Month

[Table of Contents Links](#)

1. [What information should be included in the Expense Report Name?](#)
2. [How do I enter Meals Per Diem \(Travel Allowance\) for Day Trips?](#)
3. [How do I delete a Travel Allowance entered incorrectly?](#)
4. [This is my first time traveling what is my log in and password?](#)
5. [The system is requiring and "Activity" number before I can submit an expense report. What do I input?](#)



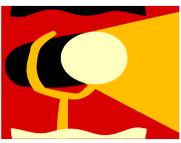
FAQ Spotlight

August 2012

Click on the Spotlight at the top of any page to return to the Table of Contents!

Table of Contents

1.	<i>What information should be included in the Expense Report name?-----</i>	3
2.	<i>How do I enter Meals per Diem (Travel Allowance) for Day Trips?-----</i>	3
A.	When opening a NEW Expense Report -----	3
B.	To an EXISTING Expense Report -----	6
3.	<i>How do I delete a Travel Allowance I entered incorrectly?-----</i>	9
4.	<i>This is my first time traveling what is my log in and password? -----</i>	11
5.	<i>The system is requiring an “Activity” number before I can submit my expense report. What do I input?-----</i>	11



FAQ Spotlight

August 2012

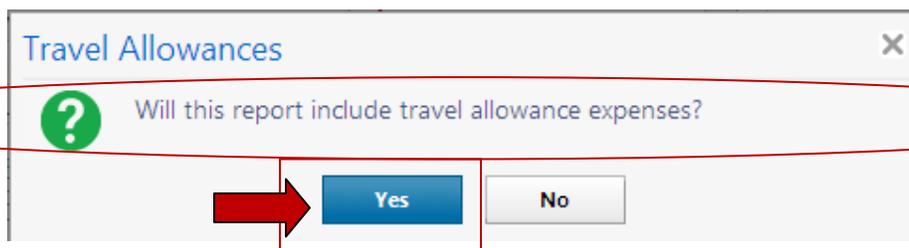
1. What information should be included in the Expense Report name?

- A specific, descriptive name for the travel expenses incurred plus start and end date the expense report covers should be in the Name field in the Report Header
 - If you have a single travel event on the report you can be very specific (i.e., GASB Conference NY 1-5 to 8)
 - If you submit weekly, semi-monthly or monthly you may need to be more generic (ie., Field visits 3-15 to 30)
 - Doing this properly is very helpful when you when entering specific expenses

2. How do I enter Meals per Diem (Travel Allowance) for Day Trips?

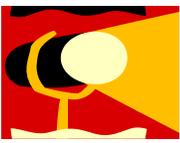
A. When opening a NEW Expense Report

- On the My Concur in the Expense Report or Active Work section click on **New Expense Report**
- Complete the required **Report Header** information
- If required, link any **Travel Requests** to the Expense Report
 - Click **Add** under **Travel Request** and select the appropriate Travel Request(s) to link to the Expense Report
- Click **Save** and the **Travel Allowances** dialogue box will appear.
- Click **Yes**



✓ **Note:** Travel Allowance Expenses = Meals Per Diem

- The **Travel Allowances** dialogue box opens to the Standard Itinerary format by default. In **Selection** choose **Regular In State** (meals) or **GSA Out of State** (meals) from the drop down
- Click on **Go To Single Day Itineraries**.



FAQ Spotlight

August 2012

Travel Allowances For Report: Weekly Travel 12-01 to 12-11

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: Weekly Travel 12-01 to 12-11
Selection: Regular In State

Add Stop Delete Rows

Departure City	Arrival City	Arrival Rate Location
No Itinerary Rows Found		

New Itinerary Stop

Depart from (city):
Date:
Time:
Arrive in (city):

Save

Go to Single Day Itineraries Next >> Cancel

✓ **Note:** You can make the Single Day Itinerary your default in **Profile**. Select **Expense Preferences** and under **Display**, check the box next to "Make Single Day Itineraries page my default in the Travel Allowance wizard."

- Enter the date you want to begin entering information for in **Choose Start Date**.
- Click **Go** to open the data entry screen.

Travel Allowances For Report: Weekly Travel 12-01 to 12-11

1 Single Day Itineraries 2 Available Itineraries 3 Expenses & Adjustments

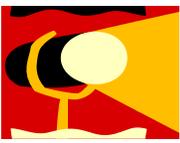
Choose start date: 12/01/2011 Go

Exclude	Date	Start Location	Depart	End Location	Arrive	Depart	Back...	Hours
<input type="checkbox"/>	12/01/2011 T...							
<input type="checkbox"/>	12/02/2011 ...							
<input type="checkbox"/>	12/03/2011 ...							
<input type="checkbox"/>	12/04/2011 ...							
<input type="checkbox"/>	12/05/2011 ...							
<input type="checkbox"/>	12/06/2011 T...							
<input type="checkbox"/>	12/07/2011 ...							

Save Itineraries

Go to Standard Itinerary Next >> Cancel

- For each day you want to claim a Travel (Meal Per Diem) Allowance enter your starting location for that day in **Start Location** and click the **Tab** key.



FAQ Spotlight

August 2012

- Enter the time (using am or pm) you left in **Depart** and click the **Tab** key.
- Enter your last business location of the day in **End Location** and click the **Tab** key.
- Enter the time you arrived at this final location in **Arrive** and click the **Tab** key.
- Enter the time you left this location in **Depart** and click the **Tab** key.
- Enter the time you arrived home in **Back** and click the **Tab** key.
 - ✓ **Note:** The system will calculate your travel status time under **Hours**.
- After you have entered all the days you are claiming, click **Save Itineraries**.
 - ✓ **Note:** You can go back in and add additional days in a different week later.

Save Itineraries

Go to Standard Itinerary Next >> Cancel

- Click **Next**.

Travel Allowances For Report: Weekly Travel 12-01 to 12-11

1 Single Day Itineraries 2 Available Itineraries 3 Expenses & Adjustments

Assigned Itineraries

Edit Unassign

Departure City	Date and Time ^	Arrival City	Date and Time	Arrival Rate Location
Itinerary: 12/01/2011 Macon				
Roswell, Georgia	12/01/2011 7:00 AM	Macon, Georgia	12/01/2011 9:15 AM	US-GA, UNITED STATES
Macon, Georgia	12/01/2011 7:30 PM	Roswell, Georgia	12/01/2011 9:00 PM	FULTON COUNTY, US-GA,...

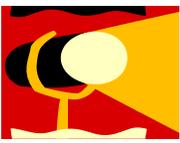
Available Itineraries

Current Itineraries [v] Delete Assign

Departure City	Date and Time ^	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Visits 10-1 to 11				

<< Previous Next >>

- Click **Next** again.
- Click on any meal period that was provided to you for any days you reported. The system will adjust your reimbursement amount for that meal period.



FAQ Spotlight

August 2012

Travel Allowances For Report: Weekly Travel 12-01 to 12-11

1 Single Day Itineraries 2 Available Itineraries 3 Expenses & Adjustments

Show dates from [] to [] Go

Exclude	All	Date/Location	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	<input type="checkbox"/>	12/01/2011 Macon, Georgia	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$14.00

<< Previous **Create Expenses** Cancel

- Click on **Create Expenses**.
- An Expense Entry called Fixed Meals will be created in your expense report for each day you claimed for any eligible amounts.

B. To an EXISTING Expense Report

- On the My Concur page in the Expense Report or Active Work section click on an existing Expense Report to open it.
- Click on the **Details** tab.

Concur Georgia

My Concur Request Expense Profile

View Reports **New Expense Report** View Receipt Store View Cash Advances New Cash Advance

Site Visits 12/1/11 **Delete Report** **Submit Report**

New Expense **Details** Receipts Print / Email

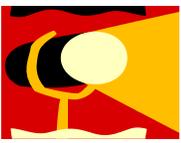
Expenses	Date	Expense Type	Amount	Requested
Adding New Expense	12/02/2011	Fixed Meals Augusta, Georgia	\$27.00	\$27.00

New Expense Receipt Store

Expense Type

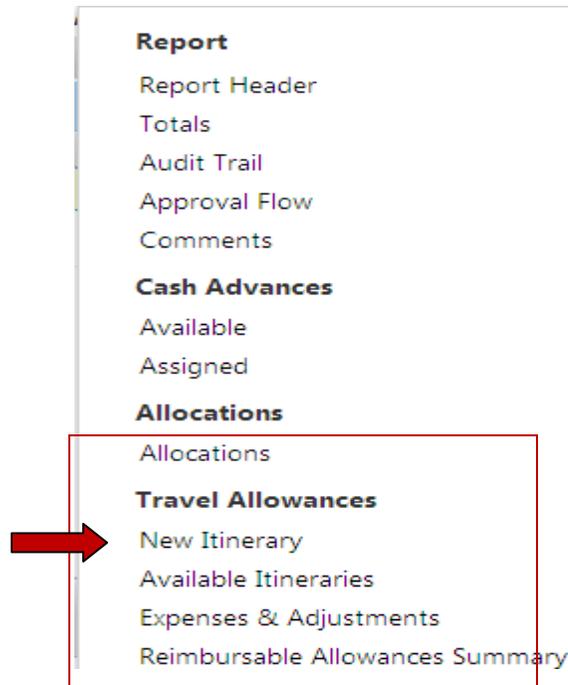
To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the

- Select **New Itinerary** under the Travel Allowances section



FAQ Spotlight

August 2012



- Enter the date you want to enter Travel (Meals Per Diem) Allowances for in **Choose Start Date** and click on **Go** to open the data entry screen.
 - ✓ **Note:** If the Standard Itinerary opens, click on **Go To Single Day Itineraries** at the bottom of the box.

Travel Allowances For Report: Site Visits 12/1 to 11

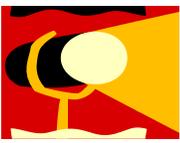
Single Day Itineraries | Available Itineraries | Expenses & Adjustments | Reimbursable Allowances Summary

Choose start date: 12/08/2011 [Go]

Exclude	Date	Start Location	Depart	End Location	Arrive	Depart	Back ...	Hours
<input type="checkbox"/>	12/08/2011 1...							
<input type="checkbox"/>	12/09/2011 ...							
<input type="checkbox"/>	12/10/2011 ...							
<input type="checkbox"/>	12/11/2011 ...							
<input type="checkbox"/>	12/12/2011 ...							
<input type="checkbox"/>	12/13/2011 T...							
<input type="checkbox"/>	12/14/2011 ...							

Save Itineraries | Go to Standard Itinerary | Cancel

- For each day you want to claim a Travel (Meal Per Diem) Allowance enter your starting location for that day in **Start Location** and click the **Tab** key.
- Enter the time (using am or pm) you left in **Depart** and click the **Tab** key.



FAQ Spotlight

August 2012

- Enter your last business location of the day in **End Location** and click the **Tab** key.
- Enter the time you arrived at this final location in **Arrive** and click the **Tab** key.
- Enter the time you left this location in **Depart** and click the **Tab** key.
- Enter the time you arrived home in **Back** and click the **Tab** key.
 - ✓ **Note:** The system will calculate your travel status time under **Hours**.
- When you have entered all the days you are claiming click **Save Itineraries**.
- Click on the **Expenses & Adjustments** tab.

Exclude	Date	Start Location	Depart	End Location	Arrive	Depart	Back ...	Hours
<input type="checkbox"/>	12/09/2011 ...							
<input type="checkbox"/>	12/10/2011 ...							
<input type="checkbox"/>	12/11/2011 ...							
<input type="checkbox"/>	12/12/2011 ...							
<input type="checkbox"/>	12/13/2011 T...							
<input type="checkbox"/>	12/14/2011 ...							

- Click on **Update Expenses**.

Exclude	All	Date/Location	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	<input type="checkbox"/>	12/02/2011 Augusta, Georgia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$27.00
<input type="checkbox"/>	<input type="checkbox"/>	12/08/2011 Augusta, Georgia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$27.00



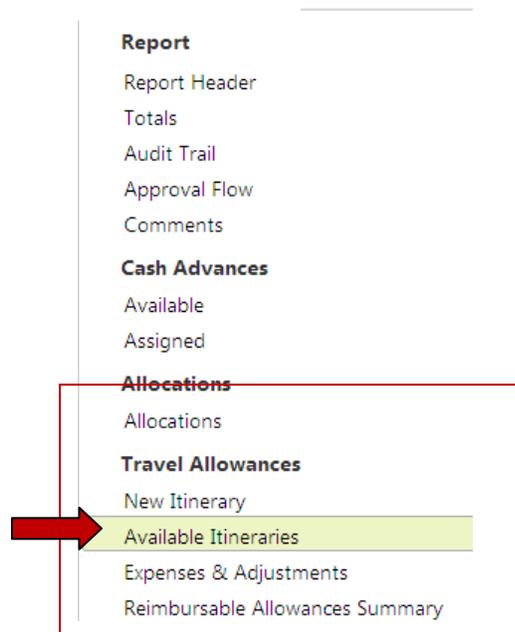
FAQ Spotlight

August 2012

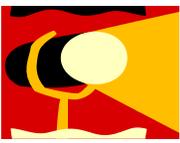
- An Expense Entry called Fixed Meals will be added to your expense report for each day you claimed for any amounts eligible according to the Travel Policy.

3. How do I delete a Travel Allowance I entered incorrectly?

- Open the Expense Report you need to correct.
- Click on the **Details** tab
 - Click on **Available Itineraries** under the **Travel Allowances** section.



- Click on the Itinerary you want to adjust in the **Assigned Itineraries** section.
- Click on **Unassign**



FAQ Spotlight

August 2012

Travel Allowances For Report: Conference in DC 10-23 to 28

Create New Itinerary Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

Assigned Itineraries

Edit Unassign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Conference in DC 10-23 to 28				
Atlanta, Georgia	10/23/2010 6:00 AM	Washington, District of C...	10/23/2010 9:30 AM	DISTRICT OF COLUMBIA, U...
Washington, District of C...	10/28/2010 6:00 PM	Atlanta, Georgia	10/28/2010 10:00 PM	FULTON COUNTY, US-GA, ...

Available Itineraries

Current Itineraries Delete Assign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
No Available Itineraries Found				

Done

- The Itinerary clears from the **Assigned Itineraries** section
 - ❖ The Itinerary is no longer assigned to this **Expense Report**

Travel Allowances For Report: Conference in DC 10-23 to 28

Create New Itinerary Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

Assigned Itineraries

Edit Unassign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
No Assigned Itineraries Found				

Available Itineraries

Itineraries for last Year Delete Assign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Alpharetta, Georgia	10/20/2011 7:00 AM	Augusta, Georgia	10/20/2011 9:30 AM	RICHMOND COUNTY, US-...
Augusta, Georgia	10/20/2011 7:00 PM	Alpharetta, Georgia	10/20/2011 9:30 PM	FULTON COUNTY, US-GA, ...
Itinerary: Conference in DC 10-23 to 28				
Atlanta, Georgia	10/23/2011 7:00 AM	Washington, District of C...	10/23/2011 9:45 AM	ALL OTHER DESTINATIONS

Done

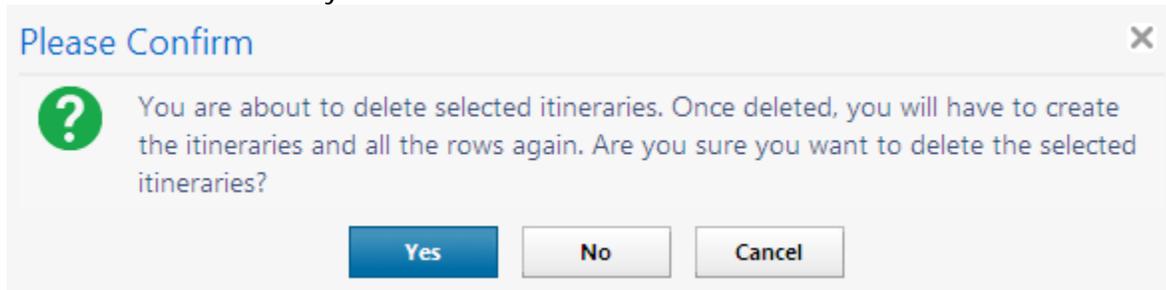
- ❖ Continue to the next step if you wish to delete the **Travel Allowance Itinerary** from the system.
- Using the scroll bars on the right, scroll to locate the Itinerary in the **Available Itineraries** section.



FAQ Spotlight

August 2012

- Select the itinerary and click on **Delete**.



- Click on **Yes** in the Confirmation dialogue box.

4. This is my first time traveling what is my log in and password?

- Please contact your Local Travel Administrator for your TTE login credentials.

5. The system is requiring an "Activity" number before I can submit my expense report. What do I input?

- The activity field is a specific code required only for GDOT (Georgia Department of Transportation) travelers. Users should contact their Local Travel Administrator to find out the appropriate number to input in that field.