

2013

TTE FAQ Spotlight – February



Top 5 Support Questions Last Month

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1. What do I do if the corporate card charges and the trip charges for the same trip appear separately in Smart Expenses?

The screenshot shows the Concur Expense Center interface. The main content area is divided into two sections: 'Expenses' and 'Smart Expenses'. The 'Expenses' section on the left lists items like 'Parking', 'Fixed Meals', and 'Personal Car M' with their respective amounts and requested amounts. The 'Smart Expenses' section on the right is divided into 'Corporate Card Charges' and 'Trip' items. A red arrow points to the 'Match' button in the 'Smart Expenses' toolbar. The 'Match' button is highlighted with a red box. The interface also shows a navigation menu at the top and a status bar at the bottom.

Normally these appear as one item. However, if they should be unmatched you can correct the problem. In this example we have two charges and trips where the data was split for some reason.

- Click on the checkbox next to the item you want to match to the expense report.
 - In our example we selected the Airtran Airways charge appearing in **Corporate Card Charges** on 1/9/13 for \$234.20.
- Then click on the matching **Trip**: item. The dollar amount should be the same.
 - In our example it is Airfare Jacksonville to Atlanta 1/07/13 for \$234.20 in the Trip section.
- Then click on the **Match** button.
- You will have two options: *Into current report* or *Into new report*. Select *Into current report*.
- The items will be matched and imported as one item into your expense report.
- If you have multiple items, do this for each item.

NOTE: Do not use the Import button or each item will import separately!



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2. What do I do if my new supervisor doesn't show up as my supervisor?

Until your agency makes the change in Payroll, the system will reflect the old supervisor. In the interim, you may change the supervisor in the submitting process by selecting your supervisor from the drop down list in the Approver field.

3. If a new traveler is having difficulty creating a Vendor ID in ESS, who should they contact?

From the Home page of the SAO website (sao.georgia.gov) select Systems, select Financials; Select **Vendor Payment Management**; then under **Employee Expense Reimbursement Resources and Training Tools** at the bottom of the page click on the **ESS Employee Expense Reimbursement Job Aid** to view complete instructions.

If you are still having difficulty, contact the Vendor Group at SAO.

4. How do I add an additional approver to the workflow?

- After you click **Submit Report** and **Accept & Submit** a screen similar to the following will appear showing your default Authorized Approver.

✓ **Note:** Your Approval form may appear different depending on the configuration for your Agency.

Approval Flow for Report: ttt 8/17

Authorized Approval:
Thornton, John A. 1

State Head Approval:
2

((this step may be skipped))

Back Office Approval:
4 3

Submit Report Cancel

- Note the blue arrows available for each level of approval.
 - Clicking an up arrow will insert an additional approver before that normal level of approval.
 - Clicking a down arrow will insert an additional approver after that normal level of approval.
 - Examples:



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- **#1** Click on the blue up arrow in #1 to add an approver *before* #1.
 - **#2** Click on the blue up arrow in #2 to add an approver *after* #1 but *before* #2.
 - ❖ In our example we have clicked on the up arrow in #2
 - **#3** Click on the blue up arrow in #3 to add an approver *after* #2 but *before* #3.
 - **#4** Click on the down arrow in #3 to add an approver *after* #3.
- Once you select an arrow a new section called **User-Added Approver** appears.

The screenshot shows a dialog box titled "Approval Flow for Report: NW GA Review 8-1". It contains four sections for adding approvers:

- Authorized Approval:** A text box containing "Thornton, John A." with a blue up arrow and a red X button to its right.
- User-Added Approver:** An empty text box with a blue up arrow and a red X button to its right. This section is circled in red.
- State Head Approval:** An empty text box with a blue up arrow and a red X button to its right. Below it is the text "((this step may be skipped))".
- Back Office Approval:** An empty text box with a blue down arrow, a blue up arrow, and a red X button to its right.

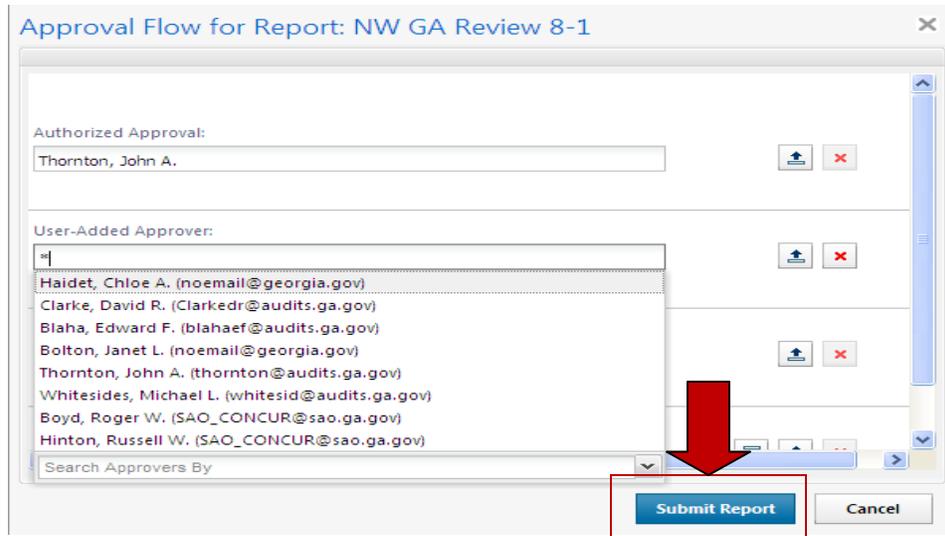
At the bottom of the dialog box are two buttons: "Submit Report" (in blue) and "Cancel".

- If you know the approver's name: Type in the last name of the approver you want to send the report to.
 - Select that approver from the list that appears and click **Submit Report**.
- If you don't know the approver's name: Type in an *. A list of ALL the approvers in your agency will appear.
 - Select the correct person from the list and click **Submit Report**.



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5. I am a new traveler and have never used the system before. Where can I locate training materials?

You can access self-service training materials from the SAO website or from inside TeamWorks Travel and Expense. We frequently update and add new training materials.

- a. SAO Website – available from any browser 24 x 7
 - Access the website <http://sao.georgia.gov>
 - Click on the **Travel** tab
 - Click on TeamWorks Travel and Expense Training





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The Training page will open:

- You have access to ALL training materials from the SAO website!

Register for live monthly webinars on this link!

Access direct links to video, interactive simulations, documents and manuals on this link!

Spotlight FAQ's only appear on the SAO website.

GEORGIAGOV

State Accounting Office

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State Travel Policy

TeamWorks Travel and Expense

TeamWorks Travel and Expense Training

2012 FAQ Spotlight Archive

Georgia Travel System

Travel News Sign Up

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TeamWorks Travel and Expense Training

Stay Connected

What's New in TTE?

Refer to the recommended TeamWorks Travel & Expense users can access the into to TeamWorks Travel & Expense

- [Recommended Training](#)
- [Upcoming Live TTE Training Webinars](#)

How To

- [How to Enter Single Day Trip Mileage](#)
- [How to Enter Multiple Day Trip Mileage](#)
- [How to Create Expense Report with Travel Allowancee and Co Paid Travel Charges from a Completed Trip](#)
- [How to Enter Travel Allowances \(Per Diem\) With No Overnight Stay](#)
- [How to Enter Travel Allowances \(Per Diem\) With Overnight Stay](#)
- [TTE Cash Advance Approver Checklist](#)
- [TTE Expense Approver Checklist](#)
- [TTE Travel Request Approver Checklist](#)

Manuals

- [TTE System User Reference Guide](#)
- [TTE Approvers Handbook](#)
- [GA Travel Assistant Handbook](#)
- [TTE Reporting Handbook](#)
- [TTE Travel Request Users Guide](#)

FAQ's

- [TeamWorks Travel and Expense Frequently Asked Questions](#)
- [2013 January Spotlight FAQ](#)
- [2012 FAQ Spotlight Archive](#)



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The Recommended Training link opens a document that provide direct links to video, interactive simulations, documents and manuals.

- b. From inside TeamWorks Travel and Expense **My Concur** Home Page:

- Scroll down to locate the **Company Info** box
- Click on the link [Travel Training Portal](#)

Company Info

New Mileage Rates for Calendar Year 2013
The GSA recently announced revised rates for calendar year 2013. The following rates are applicable to travel that occurs on or after January 1, 2013.

Tier I Rates: Automobile \$.565 per mile
Motorcycle \$.535 per mile
Aircraft \$ 1.33 per mile

Tier II Rate: Gov't Owned Available \$.24

[Sign up for Travel News](#)
Applicable to all TTE users EXCEPT KSU

In an effort to keep our users updated on travel related information, we are requesting that you sign up for "State of Georgia Travel News." Click on Link Above.

[Travel Training Portal](#)
Please see the link above for additional Travel training opportunities.

Reminder: Review Employee Profile!
All travelers **MUST** review their employee profile's, update contact information, and SAVE before making any travel reservations in Concur.

- This Travel Training Portal Opens. Simply select the item you wish to view or read.
 - These are the same items you link to in the Recommended Training Document.



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Flash Interactive Simulations

- Logging Into Expense
- Changing Your Password
- Updating Your Travel Profile
- Creating a Travel Reservation
- Changing a Trip (After Purchase)
- Exploring the My Concur Homepage
- Creating an Expense Report Based on a Trip
- Updating Your Expense Profile
- Creating a New Expense Report (includes credit card and out of pocket transactions)
- Itemizing a Nightly Lodging Expense

Concur Premier Travel and Expense Training Site

Welcome to the Concur Travel and Expense training site! To learn the basics of booking travel, submitting your expenses, or creating and managing payment requests, click the links in the left menu to practice an interactive simulation. Each simulation takes about 5 - 10 minutes to complete and will help get you up and running quickly. You can also find these simulations on the Help and Training tab in the Concur Travel and Expense system.

Guides and FAQs:

In addition to completing the interactive simulations, it is also recommended that you download the following training materials:

Recommended Training

- Travel & Expense QuickStart Guide - Step-by-step procedures, screenshots, and supporting information covering the most important tasks.
- TTE System User Reference Guide
- FAQs - Frequently asked questions and answers for both Travel & Expense.
- Using Receipt Store QuickStart Guide
- How To Enter Single Day Trip Mileage
- How To Enter Multiple Day Trip Mileage

Georgia

For questions or support, contact:

Travel Help Desk

- Local (770) 291-5190
- Toll Free (877) 548-2996
- Technical Support (866) 738-6444
- SOG@travelinc.com

Expense & Travel Policy Help Desk
(Mon-Fri 8am to 5pm)

6. Monthly Training Webinars and Special Note

Monthly Training Webinars: We will be offering live training webinars every month and you can register from the SAO website!! Go to the SAO website, select Travel, then select TeamWorks Travel and Expense Training and click on the Upcoming Live TTE Training Webinars link.

We offer Expense Report Basics, Booking Travel in TTE, Approver Training and a Spotlight Training Webinar based on the most frequently asked questions the previous months.

- **Monthly Spotlight Training:**
 - Personal Car Mileage & Importing Smart Expenses
 - o February 13, 2013 1-2pm
 - Allocations, Correcting Travel Allowances and Reporting Travel Advance when a Trip was cancelled
 - o March 12, 2013 1-2 pm
 - o April 9, 2013 10-11am
- **Booking Travel in TTE**
 - o February 26 2013 10-11 am
 - o March 26, 2013 1-2 pm am
 - o April 30, 2013 10-11 am
- **Expense Report Basics**
 - o February 19 2013 10-11:30 am



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- March 19, 2013 10-11:30 am
- April 16, 2013 1-2:30pm
- **Approver Training**
 - February 12, 2013 1-2 pm
 - March 5, 2013 10-11 am
 - April 2, 2013 1-2 pm

Special Note: We are renaming some of the documents in the How To section of the TeamWorks Travel and Expense Training page and hope to complete it next week. Once this is done:

- Document names beginning with **How To** will contain text and screen shots
- Document names beginning with **QLook** (shorthand for Quick Look!!) contain step by step instructions but no screen shots.