2013

TTE FAQ Spotlight – February

Top 5 Support Questions Last Month

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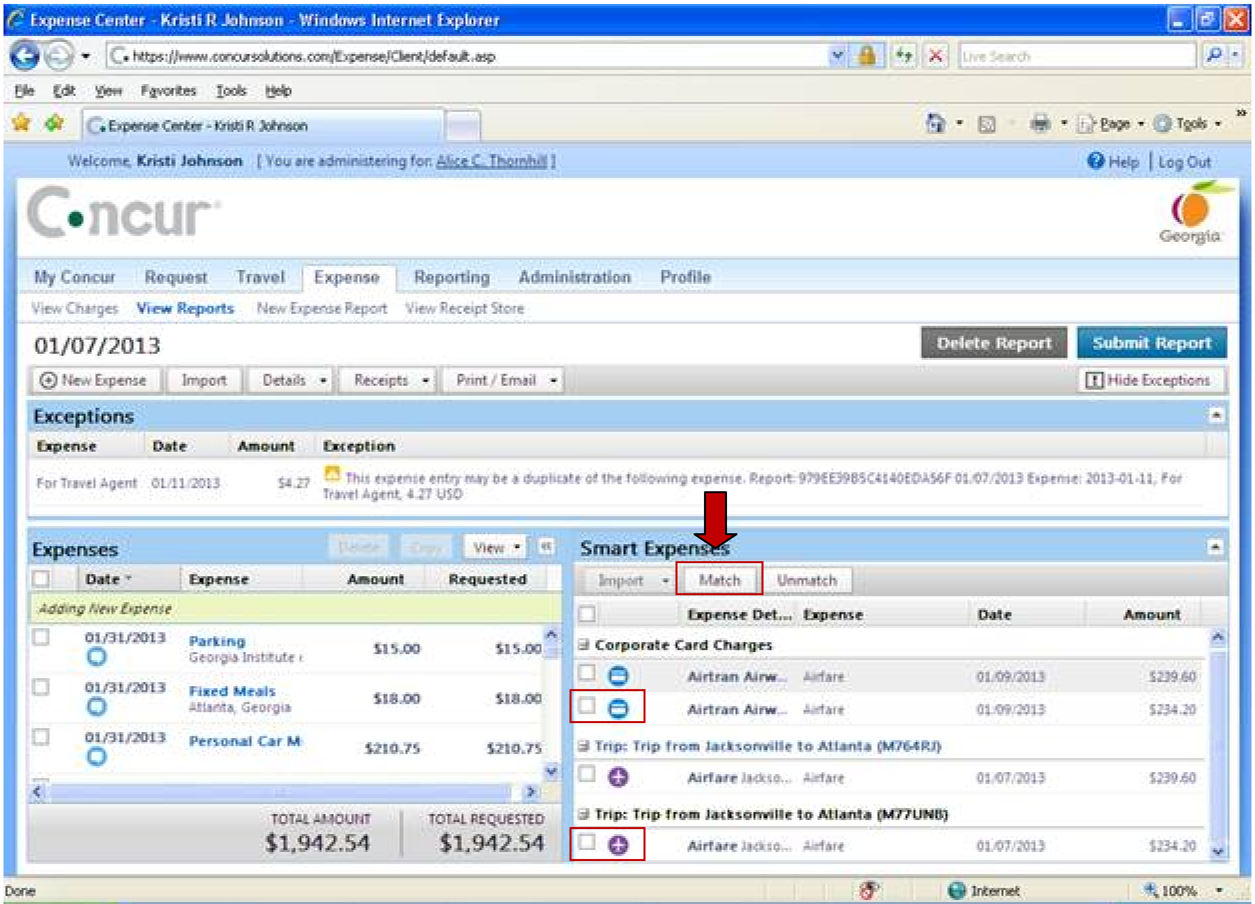
1. What do I do if the corporate card charges and the trip charges for the same trip appear separately in Smart Expenses?



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!

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.

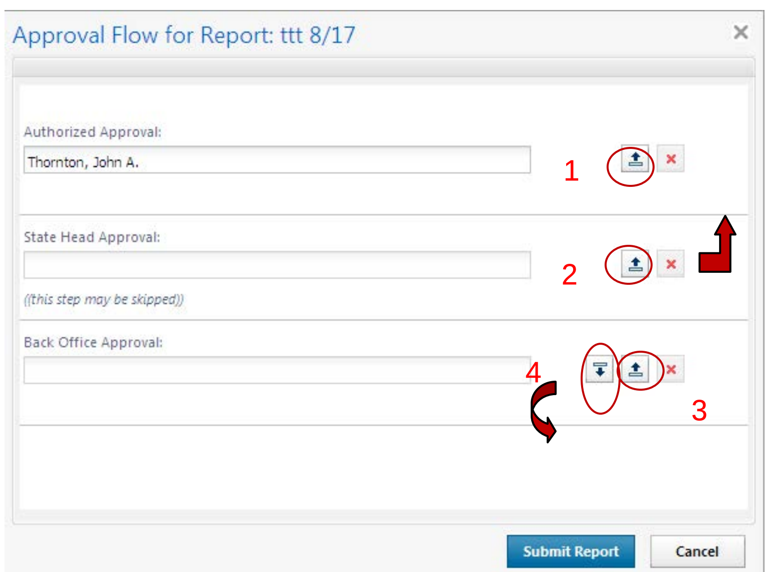
3. If a new traveler is having difficulty creating a Vendor ID in ESS, who should they contact?

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?

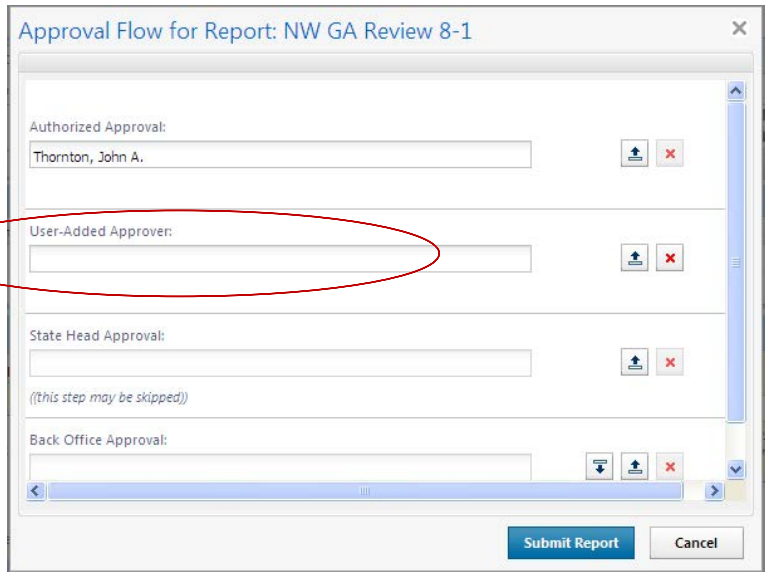
- After you click **Submit Report** and **Accept & Submit** a screen similar to the following will appear showing your default Authorized Approver.
  - ✓ **Note:** Your Approval form may appear different depending on the configuration for your Agency.



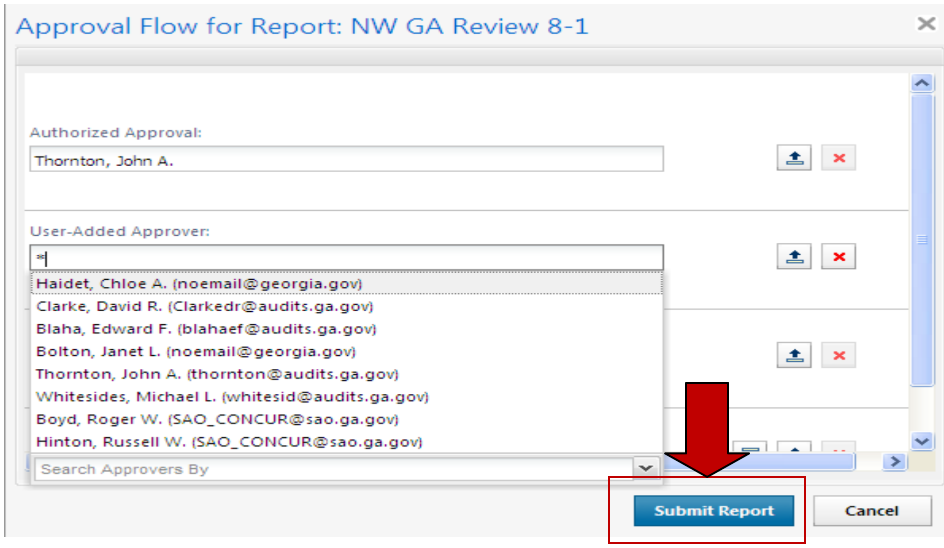
- Note the blue arrows available for each level of approval.
  - o Clicking an up arrow will insert an additional approver <u>before</u> that normal level of approval.
  - o Clicking a down arrow will insert an additional approver <u>after</u> that normal level of approval.
  - o Examples:

- **#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.



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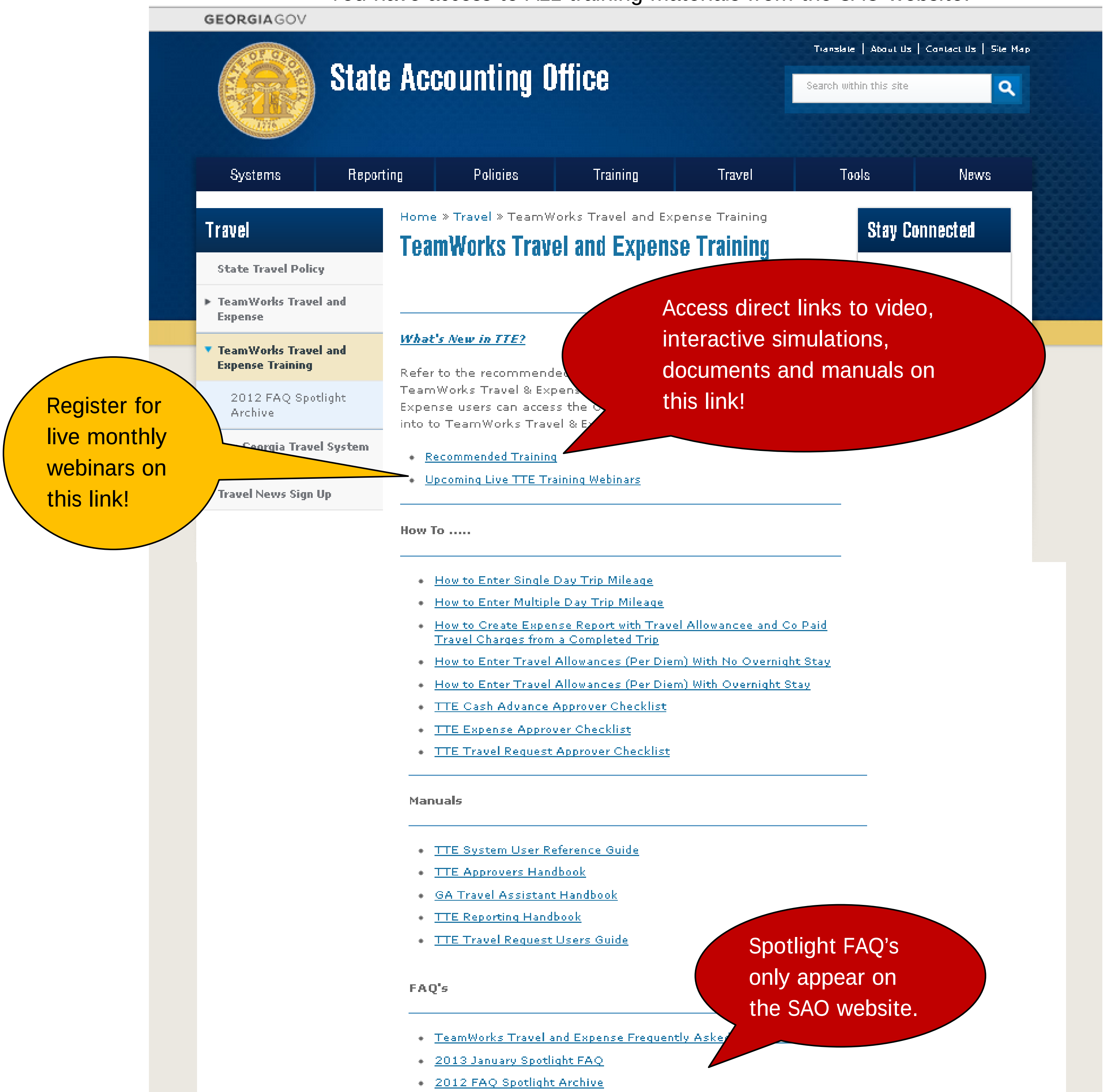
5. I am a new traveler and have never used the system before. Where can I locate training materials?

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

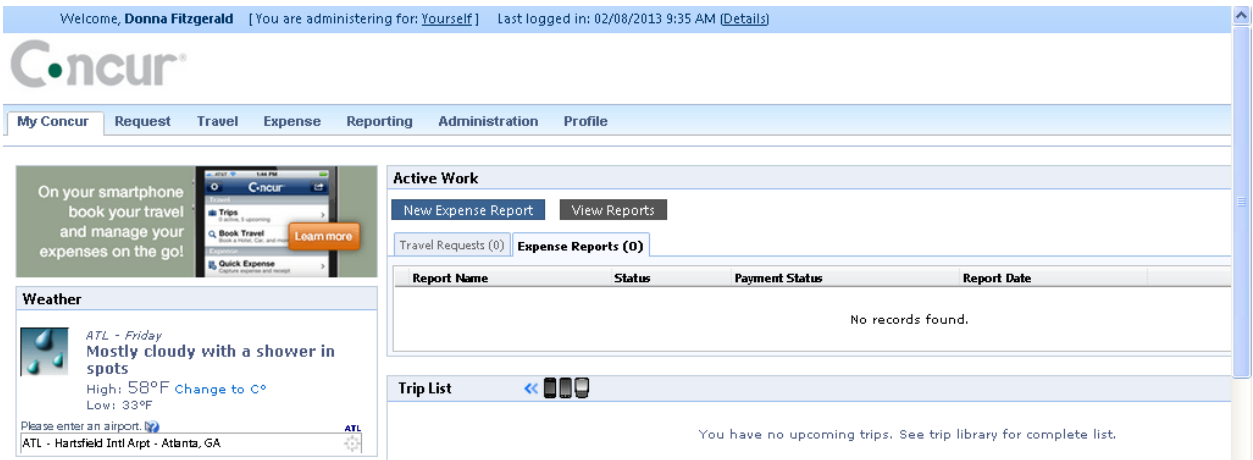
The Training page will open:

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

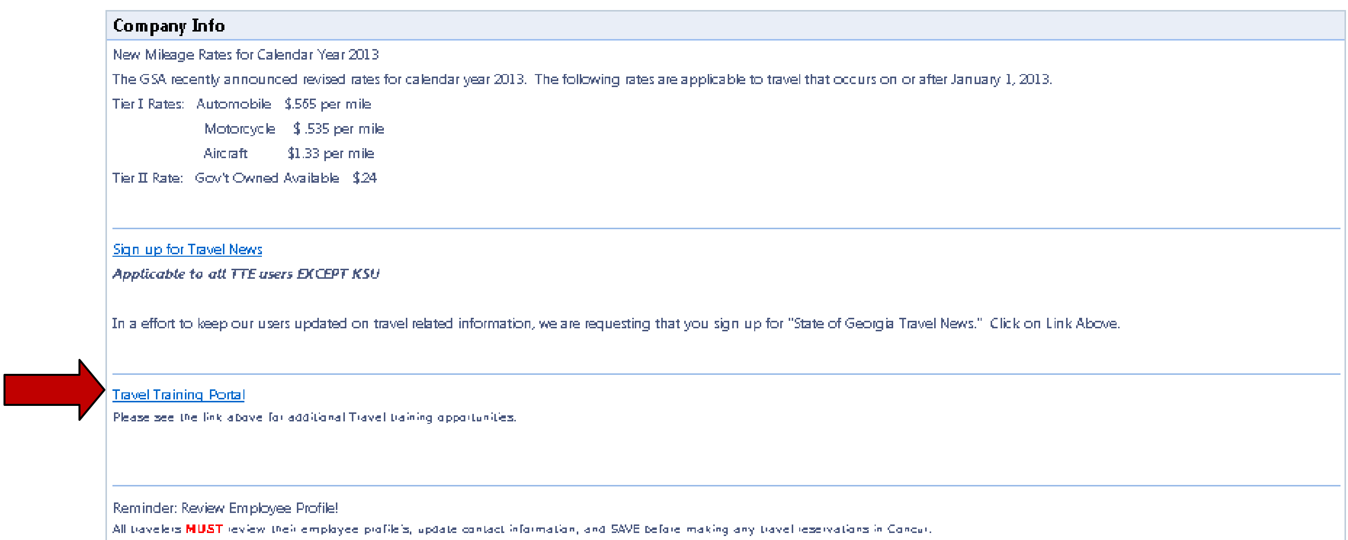


The Recommended Training link opens a document that provide direct links to video, interactive simulations, documents and manuals.

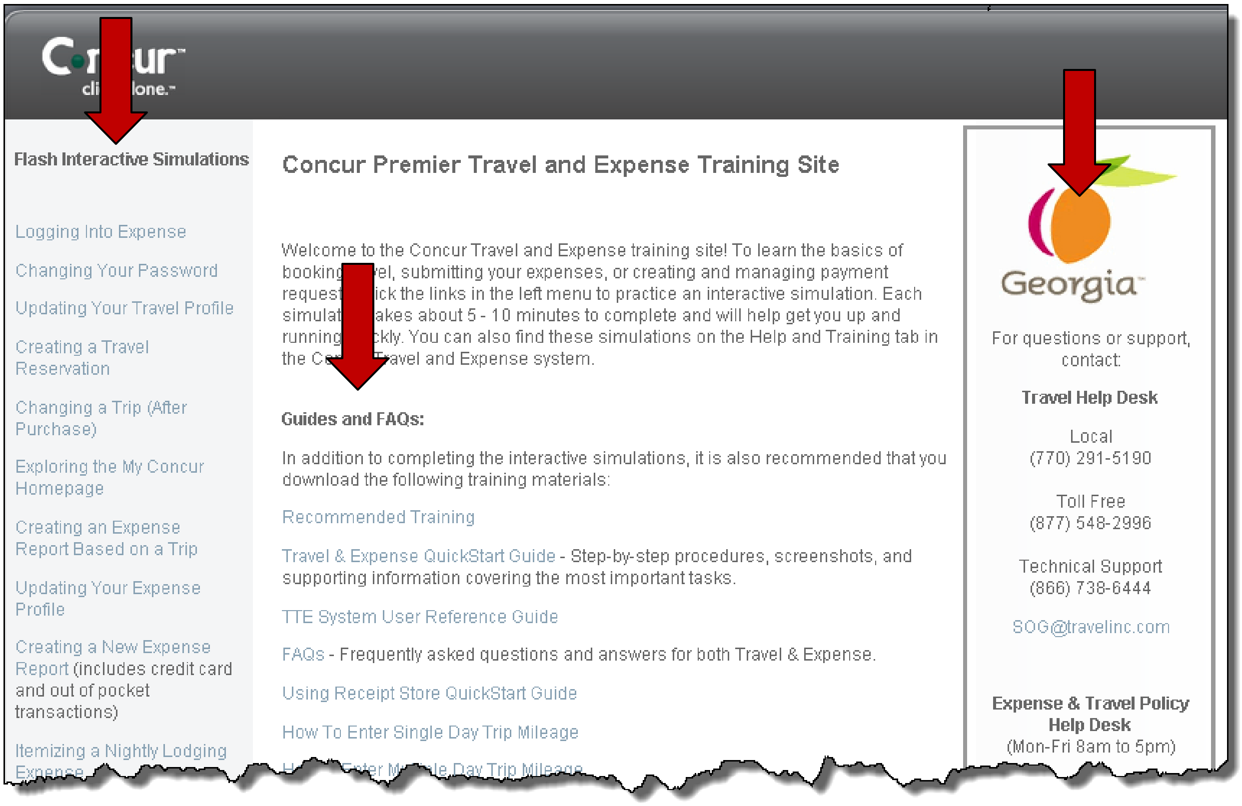
b. From inside TeamWorks Travel and Expense **My Concur** Home Page:



- Scroll down to locate the **Company Info** box
- Click on the link Travel Training Portal



- 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.



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
    - February 13, 2013 1-2pm

  Allocations, Correcting Travel Allowances and Reporting Travel Advance when a Trip was cancelled
    - March 12, 2013 1-2 pm
    - April 9, 2013 10-11am
- **Booking Travel in TTE**
    - February 26 2013 10-11 am
    - March 26, 2013 1-2 pm am
    - April 30, 2013 10-11 am
- **Expense Report Basics**
    - February 19 2013 10-11:30 am

    - 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.