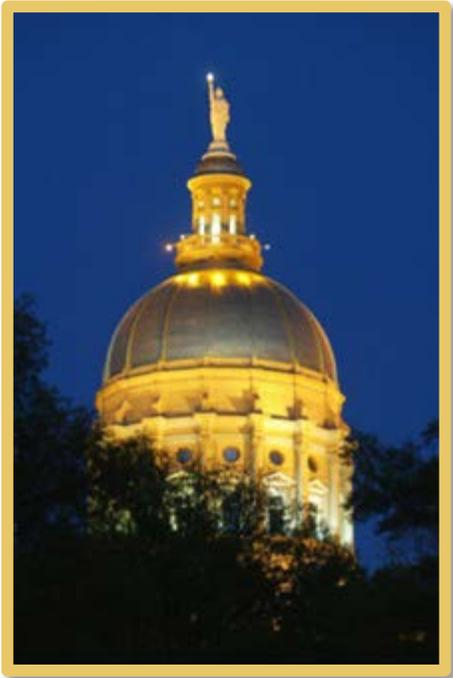


# 2013

## TTE FAQ Spotlight – November



### Top 5 Support Questions Last Month

1. [How do I add personal vehicle mileage to an Expense Report?](#)
2. [How do I enter Meals per Diem \(Travel Allowance\) Trips with No Overnight Stay?](#)
3. [How do I add Travel Allowances \(meals\) to my existing Expense Report? I said no to Travel Allowances when I initially created my expense report.](#)
4. [How do I add an additional approver to the workflow?](#)
5. [How do I import Smart Expenses into an Expense Report?](#)

# TTE FAQ Spotlight

November 2013

## TABLE OF CONTENTS

<b>1.</b>	<b>How do I add personal vehicle mileage to an Expense Report? .....</b>	<b>3</b>
<b>2.</b>	<b>How do I enter Meals per Diem (Travel Allowance) Trips with No Overnight Stay? .....</b>	<b>9</b>
A.	On a NEW Expense Report .....	9
B.	On an EXISTING Expense Report .....	13
<b>3.</b>	<b>How do I add Travel Allowances (meals) to my existing Expense Report? I selected No to Travel Allowances when I initially created my expense report.....</b>	<b>17</b>
<b>4.</b>	<b>How do I add an additional approver to the workflow? .....</b>	<b>17</b>
<b>5.</b>	<b>How do I import Smart Expenses into an Expense Report?.....</b>	<b>19</b>

# TTE FAQ Spotlight

## November 2013

### 1. How do I add personal vehicle mileage to an Expense Report?

- Open an existing Expense Report or create a new one
- On the **New Expense** tab, select **Personal Car Mileage** from the **New Expense** List; or type in all or part of the name in the search field to reduce the number expense types displayed.

**NOTE:** As you use the system, frequently used Expense Types will appear above the listing of the full Expense Type list.

The screenshot shows the TTE Expense Report interface. At the top, there are navigation tabs: My Concur, Request, Expense, and Profile. Below that, there are links for View Reports, New Expense Report, View Receipt Store, View Cash Advances, and New Cash Advance. The main header indicates 'Nov 3-16 Travel' with buttons for 'Delete Report' and 'Submit Report'. A dropdown menu shows 'New Expense', 'Details', 'Receipts', and 'Print / Email', along with a 'Hide Exceptions' button. The 'Exceptions' section lists two entries: 'Office Supplies' and 'Personal Car Mil...' with dates and amounts. The 'Expenses' section is split into 'Adding New Expense' and 'New Expense'. The 'Adding New Expense' table shows a list of expenses with columns for Date, Expense, Amount, and Requested. The 'New Expense' section has a search field with 'pers' entered and a list of 'Recently Used Expense Types' including 'Cash Advance Return', 'Personal Car Mileage', 'Miscellaneous', 'Tolls', and 'Hotel'. Below this is the 'All Expense Types' section, which includes 'Transportation' and 'Personal Car Mileage'. A red arrow points to 'Personal Car Mileage' in the 'All Expense Types' section.

- The Personal Car Mileage entry screen opens
  - Enter the **Transaction Date**. This is the date you actually drove your car.
  - Verify that the **Vehicle Id** is the correct one.
    - The Vehicle ID is NOT the VIN number. It represents the rate used to reimburse your miles.
      - Tier I is the highest rate and is used when the use of your personal car was the most economical or it was determined by your supervisor that it was the most expedient.
      - Tier II is the lowest rate and is used when you were not authorized to use your personal vehicle but chose to anyway. This is acceptable, you just receive a lower reimbursement rate.
  - No other fields are manually completed on this screen.

# TTE FAQ Spotlight

## November 2013

- Click on **Mileage Calculator** to continue

Nov 3-16 Travel Delete Report **Submit Report**

New Expense Details Receipts Print / Email Show Exceptions

Expenses	Date	Expense	Amount	Requested
<input type="checkbox"/>	11/13/2012	Fixed Meals Moultrie, Georgia	\$21.00	\$21.00
<input type="checkbox"/>	11/12/2012	Fixed Meals Valdosta, Georgia	\$21.00	\$21.00
<input type="checkbox"/>	11/08/2012	Personal Car Mileage	\$137.09	\$137.09
<input type="checkbox"/>	11/08/2012	Hotel Comfort Inns, Savannah, Georgia	\$230.00	\$230.00
<input type="checkbox"/>	11/08/2012	Tolls Savannah, Georgia	\$1.00	\$1.00
<input type="checkbox"/>	11/07/2012	Personal Car Mileage	\$131.54	\$131.54
<input type="checkbox"/>	11/06/2012	Personal Car Mileage	\$137.64	\$137.64
<input type="checkbox"/>	11/06/2012	Tolls Savannah, Georgia	\$1.00	\$1.00
<input type="checkbox"/>	11/05/2012	Personal Car Mileage	\$252.53	\$252.53
<input type="checkbox"/>	11/04/2012	Personal Car Mileage	\$124.32	\$124.32
<input type="checkbox"/>	11/04/2012	Tolls Warner Robins, Georgia	\$1.00	\$1.00
TOTAL AMOUNT			\$1,088.12	TOTAL REQUESTED \$1,088.12

**New Expense** Receipt Store

View Reimbursement Rates

Expense Type: Personal Car Mileage Transaction Date: 11/13/2012

Purpose of the Trip: Normal Travel From Location: [ ]

To Location: [ ] Payment Type: Out of Pocket

Distance: Amount: 0 : 0.00 USD Trip Type: In-State Travel

Comment: [ ]

---

Vehicle ID: Personal Car Tier1 Number of Passengers: 0

Distance to Date: 0

**Mileage Calculator**

**Save** **Attach Receipt** **Cancel**

- If the following screen appears select **Yes**.

Please Confirm X

? Required fields are missing data. Would you like to save anyway?

- The Mileage Calculator screen opens. This screen is used to enter your travel rout for the specified day.
  - Enter your starting point in box A and press the Tab key or click in the next box.
  - Continuing entering the legs of your trip in each box.
    - If you do have an exact address, enter the city and state and the system will calculate the distance to the center of that city or town. You can make adjustments to this later.
    - Enter the route as you drove it.
    - If you avoided tolls or highways, click on the check box for this at the top of the entry screen. It may come closer to your actual route. Otherwise the system creates the shortest route.
    - A visual of your trip appears on the map and the system calculates the distances between points.
    - The red balloons on the map indicate State Office locations for Agencies on the TTE system. Hover over it to view the location and/or click on it and the system will use that address as one of the stops (also called waypoints) on your travels.
  - When you get to the final leg of your trip you have a couple of options:
    - Enter the address of the final stop at the conclusion of the business day

# TTE FAQ Spotlight

November 2013

- If the final stop is the same as the stop in Box A, click on box **Make Round Trip** to automatically enter that address.

The screenshot shows the Mileage Calculator interface. On the left, there are four red arrows pointing to the Waypoints list, the 'Make Round Trip' button, and the 'Deduct Commute' checkbox. On the right, a red arrow points to the 'Make Round Trip' button on the map. The interface includes a 'Waypoints' list with addresses, a 'Directions' section with a list of steps, and a summary table at the bottom.

	TOTAL PERSONAL	TOTAL BUSINESS
	0.0 MI	91.5 MI

- Click **Deduct Commute**:
  - The Statewide Travel Policy states that you will be reimbursed for miles in excess of what you would drive to and from your assigned work station.
    - If your round trip to work is normally 40 miles you will not be reimbursed for the 1<sup>st</sup> 40 miles of your trip.
    - How you enter the trip determines whether you deduct one way, round trip or no commute.
  - The first time you use the Mileage Calculator you will enter your home address and work address in **Deduct Commute Distance**. The system will remember that information going forward.
  - Once you click on deduct commute your one way normal commute distance to your office will appear in **Total Personal** and the **Total Business** data distance will be reduced by this same amount.

# TTE FAQ Spotlight

November 2013

**Mileage Calculator**

Avoid Tolls  Avoid Highways

**Waypoints**

Waypoint	Address	Distance
A	100 Spring Drive, Roswell, GA 30075, U.S.	61.9 MI
B	2 East Main Street, Rome, GA 30161, US	18.4 MI
C	Cedartown, GA 30125, USA	11.2 MI
D	Main Line Road, Rockmart, GA 30153, U.S.	49.3 MI
E	100 Spring Drive, Roswell, GA 30075, U.S.	

[Calculate Route](#)

**Deducted Commute Distance**

**Home**  
100 Spring Drive, Roswell, GA 30075, U.S.

**Office**  
200 Piedmont Avenue SE, Atlanta, GA 30333

Deduct Round Trip

**Directions**

	TOTAL PERSONAL	TOTAL BUSINESS
<input checked="" type="checkbox"/> Deduct Commute	21.5 MI	119.3 MI

[Add Mileage to Expense](#) [Cancel](#)

- Click **Deduct Round Trip**: Determine if you need to deduct round trip personal commute miles. In our example we drove in excess of the normal daily round trip commute and we entered our trip from home and ended at home, we would need to deduct the round trip commute.
  - When you click on Deduct Round Trip the Total Personal miles increases to the round trip mileage to and from work and the Total Business mileage is reduced by this additional amount.
- **NOTE**: If you have an address that is not accepted by Google Maps, click on the **Report a map error** link at the bottom of the map. Follow the prompts and enter the required data. Google Maps updates this and not SAO.
- Click **Add Mileage to Expense**

# TTE FAQ Spotlight

November 2013

**Mileage Calculator**

Avoid Tolls  Avoid Highways

**Waypoints** Distances Personal

- A 100 Spring Drive, Roswell, GA 30075, US: 61.9 MI
- B 2 East Main Street, Rome, GA 30161, US: 18.4 MI
- C Cedartown, GA 30125, USA: 11.2 MI
- D Main Line Road, Rockmart, GA 30153, US: 49.3 MI
- E 100 Spring Drive, Roswell, GA 30075, US
- F

[Calculate Route](#)

**Deducted Commute Distance**

**Home**  
100 Spring Drive, Roswell, GA 30075, US: 43.0 MI

**Office**  
200 Piedmont Avenue SE, Atlanta, GA 30333, US:  Deduct Round Trip

**Directions**

<input checked="" type="checkbox"/> Deduct Commute	TOTAL PERSONAL <b>43.0 MI</b>	TOTAL BUSINESS <b>97.8 MI</b>
--	----------------------------------	----------------------------------

[Add Mileage to Expense](#) [Cancel](#)

- The expense entry displays with information from Mileage Calculator completing the Expense Entry.
  - The From and To locations are populated from the Mileage calculator
  - The Distance and Amount are populated from the Mileage Calculator
- If you need to attach documentation such as the DOAS Car Cost Comparison click on the Attach button and follow the prompts. Attaching documents or receipts is the same for all Expense Types.
- If you need to adjust the total mileage calculated, you may. However, be certain to enter a reason for making the adjustment in the Comments field so your approver doesn't return your expense report for more information.
- To adjust total miles, just replace the number in the field with the adjusted number.

# TTE FAQ Spotlight

## November 2013

The screenshot shows the 'Expense' profile page for a 'Nov 3-16 Travel' report. The 'Expenses' table lists various items, including 'Personal Car Mileage' for 11/13/2012. A warning message states: 'The Transaction Date is Greater than 30 days old. Please be more timely in your expense submissions. Missing required field: From Location, To Location.' The 'Expense' details form on the right shows 'Personal Car Mileage' selected, with 'From Location' and 'To Location' fields highlighted in red. A red arrow points to the 'Save' button at the bottom right.

Date	Expense	Amount	Requested
11/13/2012	Fixed Meals Moultrie, Georgia	\$21.00	\$21.00
11/13/2012	Personal Car Mileage	\$0.00	\$0.00
11/12/2012	Fixed Meals Valdosta, Georgia	\$21.00	\$21.00
11/08/2012	Personal Car Mileage	\$137.09	\$137.09
11/08/2012	Hotel Comfort Inns, Savannah, Georgia	\$230.00	\$230.00
11/08/2012	Tolls Savannah, Georgia	\$1.00	\$1.00
11/07/2012	Personal Car Mileage	\$131.54	\$131.54
11/06/2012	Personal Car Mileage	\$137.64	\$137.64
11/06/2012	Tolls Savannah, Georgia	\$1.00	\$1.00
11/05/2012	Personal Car Mileage	\$252.53	\$252.53
11/04/2012	Personal Car Mileage		
TOTAL AMOUNT		\$1,088.12	\$1,088.12
TOTAL REQUESTED		\$1,088.12	\$1,088.12

- When you are done, click on **Save**. This will update the entry and place it in the Expense Report.
- Repeat this process for each day you claim Personal Car Mileage

The screenshot shows the 'New Expense' form. The 'Expenses' table on the left has a red circle around the 'Personal Car Mileage' entry for 11/13/2012, which shows an amount of \$54.39. The 'New Expense' form on the right is empty, with a search bar and a list of 'Recently Used Expense Types' including 'Personal Car Mileage', 'Cash Advance Return', 'Miscellaneous', and 'Tolls'.

Date	Expense	Amount	Requested
11/13/2012	Fixed Meals Moultrie, Georgia	\$21.00	\$21.00
11/13/2012	Personal Car Mileage	\$54.39	\$54.39
11/12/2012	Fixed Meals Valdosta, Georgia	\$21.00	\$21.00
11/08/2012	Personal Car Mileage	\$137.09	\$137.09
11/08/2012	Hotel Comfort Inns, Savannah, Georgia	\$230.00	\$230.00
11/08/2012	Tolls Savannah, Georgia	\$1.00	\$1.00
11/07/2012	Personal Car Mileage	\$131.54	\$131.54
11/06/2012	Personal Car Mileage	\$137.64	\$137.64
11/06/2012	Tolls Savannah, Georgia	\$1.00	\$1.00
11/05/2012	Personal Car Mileage	\$252.53	\$252.53
11/04/2012	Personal Car Mileage	\$124.32	\$124.32
TOTAL AMOUNT		\$1,142.51	\$1,142.51
TOTAL REQUESTED		\$1,142.51	\$1,142.51

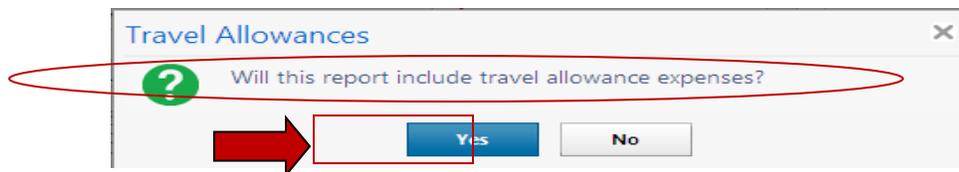
# TTE FAQ Spotlight

November 2013

## 2. How do I enter Meals per Diem (Travel Allowance) Trips with No Overnight Stay?

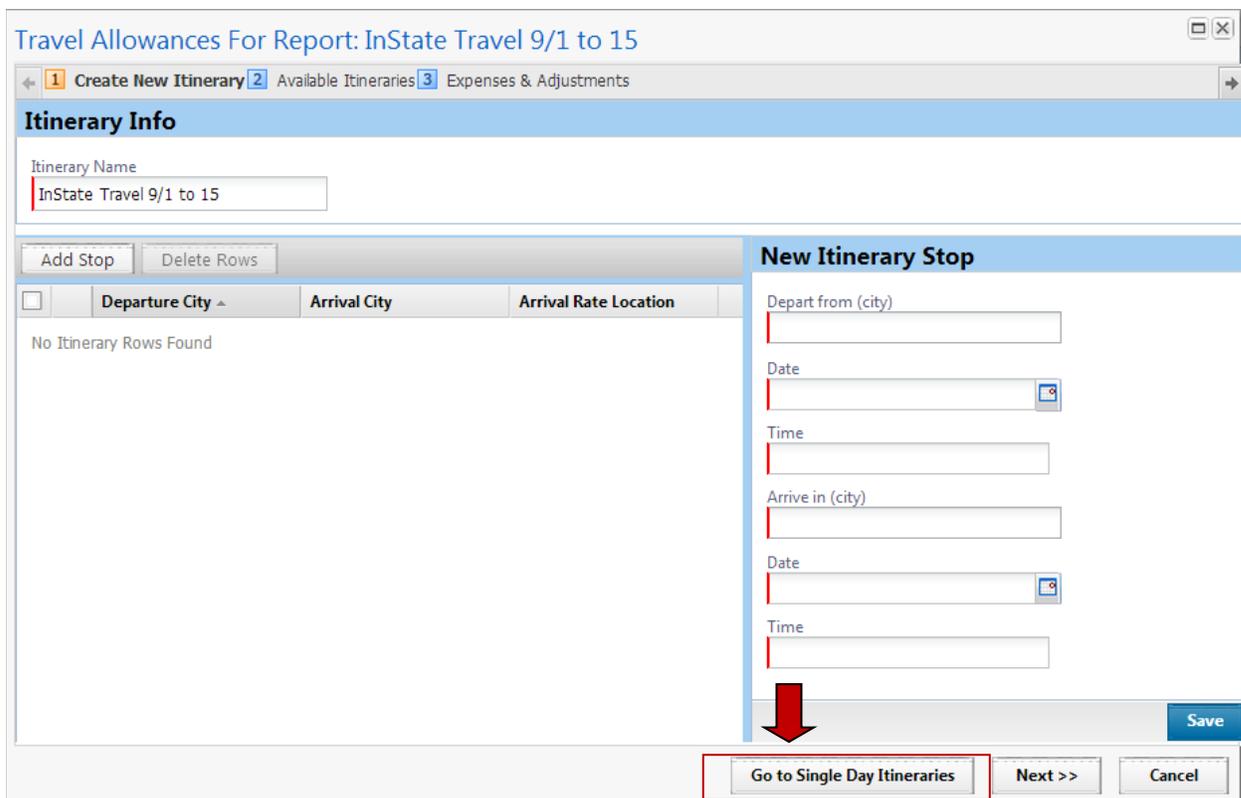
### A. On a NEW Expense Report

- 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:** The change to accommodate the new Statewide Travel Policy regarding Meals with no Overnight Duration became effective 7/1/13 with the new Statewide Travel Policy.

- Click on **Go to Single Day Itineraries** if the Single Day Itinerary entry form does not display.



- The Single Day Itinerary Entry Form Opens

# TTE FAQ Spotlight

## November 2013

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

Excl...	Date	Start Location	Dep...	End Location	Arrive	Dep...	Bac...	Hours
<input type="checkbox"/>	09/16/2013 Mon...							
<input type="checkbox"/>	09/17/2013 Tues...							
<input type="checkbox"/>	09/18/2013 Wed...							
<input type="checkbox"/>	09/19/2013 Thur...							
<input type="checkbox"/>	09/20/2013 Friday							
<input type="checkbox"/>	09/21/2013 Satu...							
<input type="checkbox"/>	09/22/2013 Sun...							

- The date you selected will now display – 7 days display at once.

Excl...	Date	Start Location	Dep...	End Location	Arrive	Dep...	Bac...	Hours
<input type="checkbox"/>	09/08/2013 Sun...							
<input type="checkbox"/>	09/09/2013 Mo...	An itinerary already exists for this day						
<input type="checkbox"/>	09/10/2013 Tues...							
<input type="checkbox"/>	09/11/2013 Wed...							
<input type="checkbox"/>	09/12/2013 Thur...							
<input type="checkbox"/>	09/13/2013 Friday							
<input type="checkbox"/>	09/14/2013 Satu...							

- If Itineraries already display, as in our example, that means those days were already used to claim Travel Allowance on this or another Expense Report
  - 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.

# TTE FAQ Spotlight

## November 2013

- Enter the time (using am or pm) you left in **Depart** and click the **Tab** key.
- Enter your last business destination of the day in **End Location** and click the **Tab** key.
  - ✓ **Note:** You must select the destination city with (Single Day) after the name. If you select a destination city that does not have (Single Day) after the name you will not receive the correct Travel Allowance,
- 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
  - ✓ **NOTE:** Any days where meals have already been requested on ANY expense report for the date period displayed will show the message “An itinerary already exists for this day.” You cannot claim meals for the same day twice.

Travel Allowances For Report: InState Travel 9/1 to 15

Single Day Itineraries Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

Choose start date 09/08/2013 Go

Excl...	Date	Start Location	Dep...	End Location	Arrive	Dep..	Bac..	Hours
<input type="checkbox"/>	09/08/2013 Sun...							
	09/09/2013 Mo...	An itinerary already exists for this day						
<input type="checkbox"/>	09/10/2013 Tues...							
<input type="checkbox"/>	09/11/2013 Wed...	Atlanta, Georgia	7:00 AM	Augusta (Single Day), Georgia	9:00 AM	6:00 PM	7:00 PM	12:00
<input type="checkbox"/>	09/12/2013 Thur...	Atlanta, Georgia	6:00 AM	Moultrie (Single Day), Georgia	9:00 AM	5:00 PM	8:00 PM	14:00
<input type="checkbox"/>	09/13/2013 Friday							
<input type="checkbox"/>	09/14/2013 Satu...							

- Click the **Expenses and Adjustments** tab

# TTE FAQ Spotlight

## November 2013

Travel Allowances For Report: InState Travel 9/1 to 15

Single Day Itineraries Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

Choose start date 09/08/2013 Go

Excl...	Date	Start Location	Dep...	End Location	Arrive	Dep...	Bac...	Hours
<input type="checkbox"/>	09/08/2013 Sun...							
	09/09/2013 Mo...	An itinerary already exists for this day						
<input type="checkbox"/>	09/10/2013 Tues...							
	09/11/2013 Wed...	Itinerary has been created						

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

Travel Allowances For Report: InState Travel 9/1 to 15

Single Day Itineraries Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

Show dates from to Go

Exclude   All	Date/Location ^	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	09/11/2013 Augusta (Single Day), G...	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$16.00
<input type="checkbox"/>	09/12/2013 Moultrie (Single Day), G...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$28.00

<< Previous Next >> **Create Expenses** Cancel

- Expense entries called Fixed Meals will be created in your expense report for each day you claimed with the allowable reimbursement amounts.

# TTE FAQ Spotlight

## November 2013

**Expenses**

Date	Expense	Amount	Requested
09/12/2013	Fixed Meals Moultrie (Single Day), Georgia	\$28.00	\$28.00
09/11/2013	Fixed Meals Augusta (Single Day), Georgia	\$16.00	\$16.00
TOTAL AMOUNT		\$44.00	\$44.00
TOTAL REQUESTED		\$44.00	\$44.00

**NOTE:** When entering Travel Allowance associated with travel status time with no overnight stay, you must remember to select final destination locations that have (Single Day) after the location name. If you do not, your Travel Allowance will not be incorrect. Additionally, do not select locations with (Single Day) in the name for the starting location.

### B. On an EXISTING Expense Report

**NOTE:** You may now add Travel Allowances for travel with or without an overnight stay on the same expense report.! Simply choose the Standard Itinerary for Travel Allowances accompanied with overnight stay(s) or Single Day Itinerary for Travel Allowances where no overnight occurred. Additionally for Single Day Travel ONLY use locations with (Single Day) in the location name for the final business destination of the day as described below

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

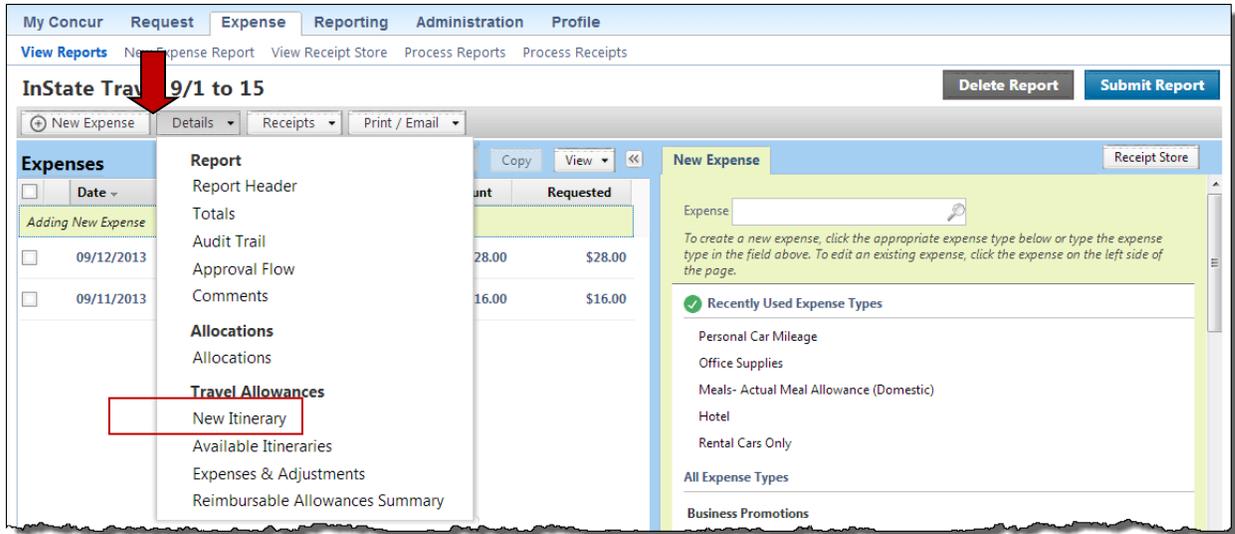
**Active Reports**

Report Name	Comments	Status	Payment Status	Report Date	Total	Requeste...
InState Travel 9/1 to 15 Normal Travel		Not Submitted	Not Paid	09/20/2013	\$44.00	\$44.00

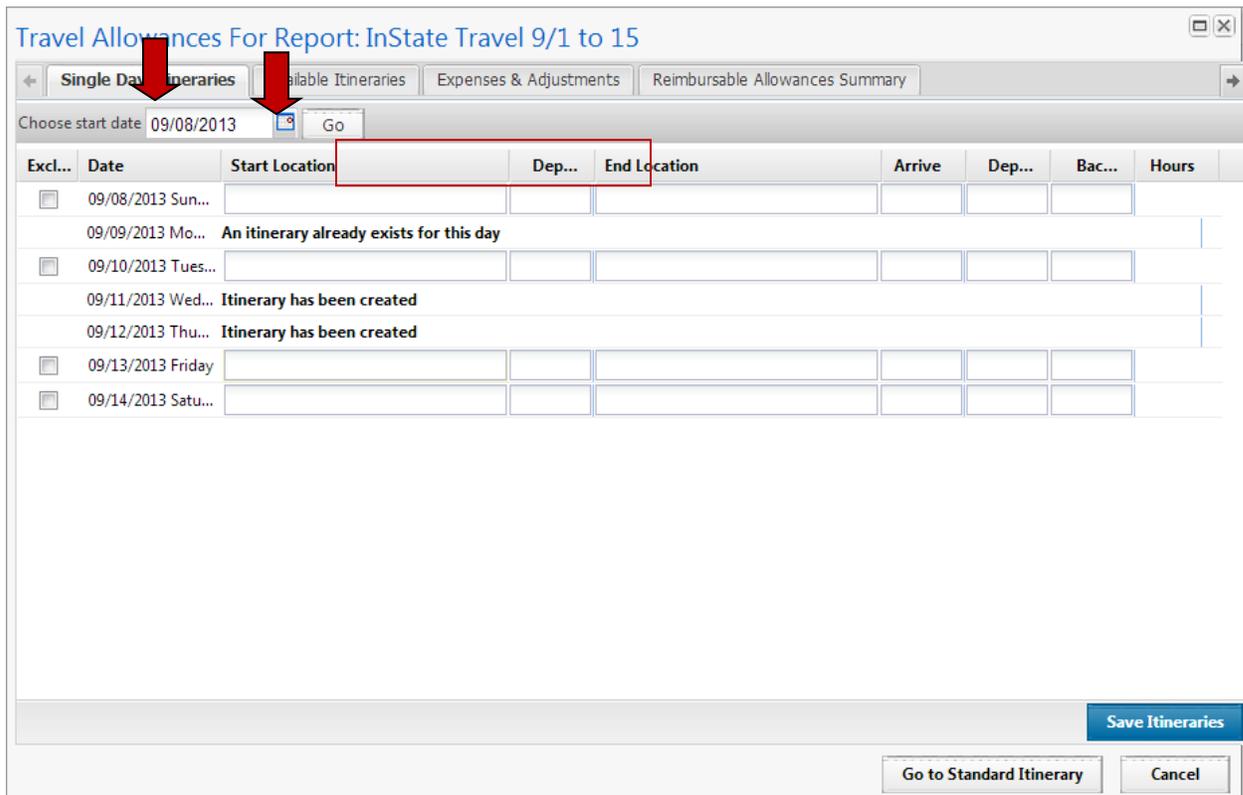
- Click on the **Details** tab.
- Select **New Itinerary** under the Travel Allowances section

# TTE FAQ Spotlight

## November 2013



- The system opens to the last Meal Type used:
  - ✓ **Note:** You cannot mix expenses for In State, Out of State and International Travel on the same Expense Report.
- Click on **Go to Single Day Itineraries** if necessary
- If the dates displayed in Travel Allowance Single Day Entry are not the dates you need to access, change the date in **Choose Start Date** and click on **Go** to open the data entry screen to the correct dates.
  - 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.



# TTE FAQ Spotlight

## November 2013

- Enter the location you started from in the Start Location
- Enter the time (using am or pm) you left in **Depart** and click the **Tab** key.
- Enter your last business location (Single Day) of the day in **End Location** and click the **Tab** key.
  - ✓ **Note:** You MUST choose a location with (Single Day) displayed after the location name. If you do not the Per Diem will not calculate the correct rate and will display \$27.
- 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**.

Travel Allowances For Report: InState Travel 9/1 to 15

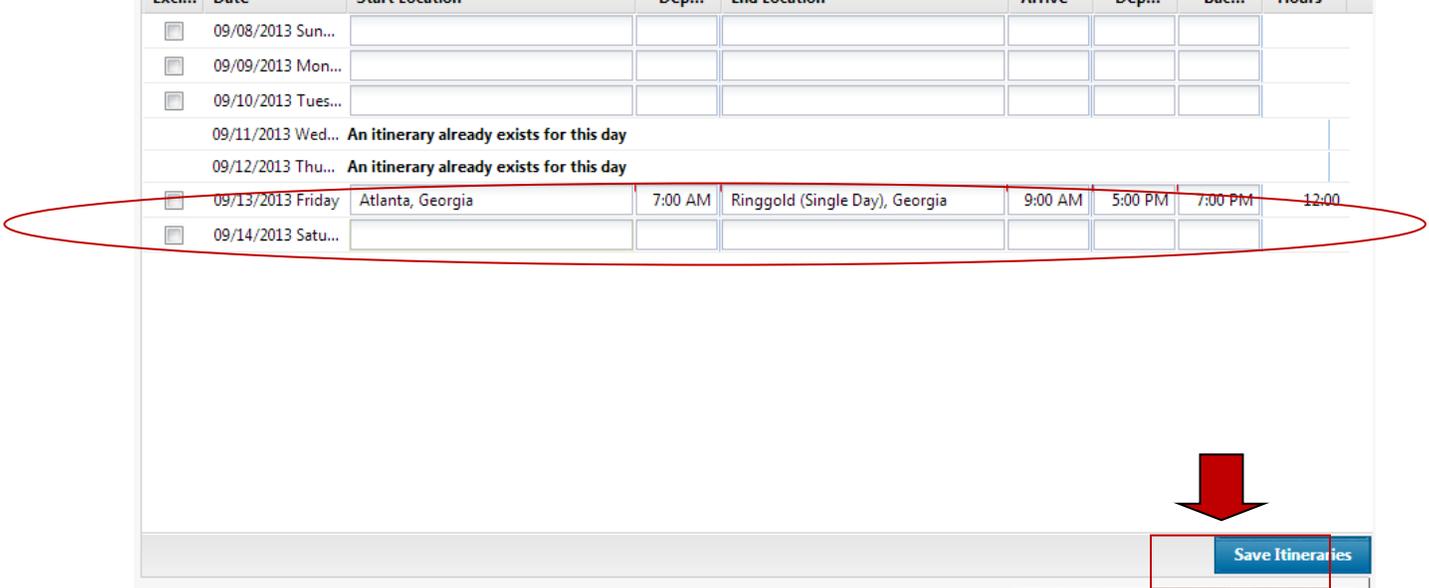
Single Day Itineraries Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

Choose start date 09/08/2013 Go

Excl...	Date	Start Location	Dep...	End Location	Arrive	Dep...	Bac...	Hours
<input type="checkbox"/>	09/08/2013 Sun...							
<input type="checkbox"/>	09/09/2013 Mon...							
<input type="checkbox"/>	09/10/2013 Tues...							
	09/11/2013 Wed...	An itinerary already exists for this day						
	09/12/2013 Thu...	An itinerary already exists for this day						
<input type="checkbox"/>	09/13/2013 Friday	Atlanta, Georgia	7:00 AM	Ringgold (Single Day), Georgia	9:00 AM	5:00 PM	7:00 PM	12:00
<input type="checkbox"/>	09/14/2013 Satu...							

Save Itineraries

Go to Standard Itinerary Cancel



- Click on the **Expenses & Adjustments** tab at the top of the window
- Click on any meals that were provided for you
- Click on **Update Expenses**.

# TTE FAQ Spotlight

## November 2013

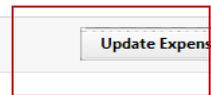


Travel Allowances For Report: InState Travel 9/1 to 15

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

Show dates from  to  Go

Exclude   All <input type="checkbox"/>	Date/Location ^	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	09/11/2013 Augusta (Single Day), Ge...	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$16.00
<input type="checkbox"/>	09/12/2013 Moultrie (Single Day), G...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$28.00
<input type="checkbox"/>	09/13/2013 Ringgold (Single Day), G...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$28.00



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

Welcome, Donna Fitzgerald [ You are administering for: Yourself ] Help | Log Out

**Concur** Georgia

My Concur | Request | **Expense** | Reporting | Administration | Profile

View Reports | New Expense Report | View Receipt Store | Process Reports | Process Receipts

**InState Travel 9/1 to 15** Delete Report | Submit Report

New Expense | Details | Receipts | Print / Email

Expenses	Date	Expense	Amount	Requested
<i>Adding New Expense</i>				
<input type="checkbox"/>	09/13/2013	<b>Fixed Meals</b> Ringgold (Single Day), Georgia	\$28.00	\$28.00
<input type="checkbox"/>	09/12/2013	<b>Fixed Meals</b> Moultrie (Single Day), Georgia	\$28.00	\$28.00
<input type="checkbox"/>	09/11/2013	<b>Fixed Meals</b> Augusta (Single Day), Georgia	\$16.00	\$16.00
			TOTAL AMOUNT	TOTAL REQUESTED
			<b>\$72.00</b>	<b>\$72.00</b>

**New Expense** Receipt Store

Expense

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 expense on the left side of the page.

**Recently Used Expense Types**

- Personal Car Mileage
- Office Supplies
- Meals- Actual Meal Allowance (Domestic)
- Hotel
- Rental Cars Only

**All Expense Types**

- Business Promotions**
  - Other Promotional Expense
  - Trade Shows
- Communications**
  - Cellular Phone
  - Internet Charges
  - Local Phone

# TTE FAQ Spotlight

November 2013

### 3. How do I add Travel Allowances (meals) to my existing Expense Report? I selected No to Travel Allowances when I initially created my expense report.

- Open the Expense Report you want to add Travel Allowances to.
- Click on the **Details** tab
- Click on **New Itinerary**

The screenshot displays the Concur Expense Center interface for a user named William Abercrombie. The main report is titled "Instate Travel 7-16 to 31 Sgl". A dropdown menu is open over the "Details" tab, showing options for "Report", "Cash Advances", "Allocations", and "Travel Allowances". The "New Itinerary" option under "Travel Allowances" is highlighted. Below the menu, a table shows the following data:

Amount	Requested
36.00	\$36.00
73.46	\$173.46
45.77	\$45.77
28.00	\$28.00
TOTAL REQUESTED	
\$357.00	\$357.00

The "New Expense" form on the right includes a search field for "Expense" and a list of "Recently Used Expense Types" such as "Personal Car Mileage", "Tolls", "Rental Cars Only", "Hotel", and "Parking".

- Proceed as usual to enter Travel Allowances for travel days with No Overnight Stay (Single Day Itinerary) or With Overnight Stay (Standard Itinerary)

### 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.

# TTE FAQ Spotlight

## November 2013

Approval Flow for Report: ttt 8/17

Authorized Approval:  
Thornton, John A.

State Head Approval:  
(this step may be skipped)

Back Office Approval:

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:
    - **#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.

# TTE FAQ Spotlight

November 2013

The screenshot shows a dialog box titled "Approval Flow for Report: NW GA Review 8-1". It contains several input fields for selecting approvers: "Authorized Approval:" (with "Thornton, John A." entered), "User-Added Approver:" (highlighted with a red oval), "State Head Approval:", and "Back Office Approval:". Each field has a search icon and a close icon. At the bottom, there are "Submit Report" and "Cancel" buttons.

- 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**.

This screenshot shows the same dialog box as above, but with the "User-Added Approver" dropdown menu open. The list contains the following entries: "Haidet, Chloe A. (noemail@georgia.gov)", "Clarke, David R. (Clarkedr@audits.ga.gov)", "Blaha, Edward F. (blahaef@audits.ga.gov)", "Bolton, Janet L. (noemail@georgia.gov)", "Thornton, John A. (thornton@audits.ga.gov)", "Whitesides, Michael L. (whitesid@audits.ga.gov)", "Boyd, Roger W. (SAO\_CONCUR@sao.ga.gov)", and "Hinton, Russell W. (SAO\_CONCUR@sao.ga.gov)". A red arrow points from the bottom of the list to the "Submit Report" button, which is also highlighted with a red box.

## 5. How do I import Smart Expenses into an Expense Report?

- Use the **My Concur** tab and the **Active Work** section or the **Expense** tab and **View Reports**.
- Click on an existing Expense Report to open it.

# TTE FAQ Spotlight

## November 2013

Active Work

New Expense Report View Reports

Expense Reports (1) Cash Advances (0)

Report Name	Status	Payment Status	Report Date	Requested Amount
Training April 2013 Training Test	Not Submitted	Not Paid	06/05/2013	\$0.00

- The Expense Report Opens
- Click on the **Import** tab

My Concur Travel Expense Reporting Administration Profile

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

Training April 2013 Delete Report Submit Report

New Expense Import Details Receipts Print / Email

Expenses Delete Copy View Receipt Store

Date	Expense	Amount	Requested
Adding New Expense			

New Expense Expense

To create a new expense, click the appropriate expense type below or type the expense type in the field

- The **Smart Expense** window opens
- Click on the check box next to the expenses you wish to add to this expense report
  - In our example we are selecting two of the four Smart Expenses

My Concur Travel Expense Reporting Administration Profile

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

Training April 2013 Delete Report Submit Report

New Expense Import Details Receipts Print / Email

Expenses Delete Copy View Smart Expenses

Expense Detail	Expense	Date	Amount
Corporate Card Charges			
<input checked="" type="checkbox"/>	Alaska Airlines Inc... Airfare	04/18/2013	\$471.80
<input checked="" type="checkbox"/>	Travel, Inc. Duluth For Travel Agent	04/16/2013	\$9.02
<input type="checkbox"/>	Travel, Inc. Duluth For Travel Agent	04/16/2013	\$9.02
<input type="checkbox"/>	US Airways Airfare	04/16/2013	\$414.80

- Click on the **Import** tab in the **Smart Expenses** box
  - If you clicked on the drop down arrow in the Import Tab here you will see two options
    - To New Report
    - To Current Report
    - Select **To Current Report**
  - If you clicked on the Import Tab without touching the drop down arrow the system will automatically select To Current Report

# TTE FAQ Spotlight

## November 2013

My Concur Travel Expense Reporting Administration Profile

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

Training April 2013 Delete Report Submit Report

New Expense Import Details Receipts Print / Email

Expenses Delete Copy View Smart Expenses

All Cards Import Match Unmatch Delete

Ex To Current Report To New Report

Expense	Date	Amount
Alaska Airlines Inc. Airfare	04/18/2013	\$471.80
Travel, Inc. Duluth For Travel Agent	04/16/2013	\$9.02
Travel, Inc. Duluth For Travel Agent	04/16/2013	\$9.02
US Airways Airfare	04/16/2013	\$414.80

- Click **OK** on the **Smart Expenses** dialogue box that pops up

Smart Expenses

**The selected items have been successfully imported as expenses.**

Never show this prompt again

OK

- The selected Smart Expenses are now assigned to this Expense Report
- If you see a Red Exception Flag  on any expense, you must resolve the issue or the expense report cannot be submitted
- Click on the item with the red flag you wish to correct

My Concur Travel Expense Reporting Administration Profile

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

Training April 2013 Delete Report Submit Report

New Expense Import Details Receipts Print / Email Hide Exceptions

Exceptions

Expense	Date	Amount	Exception
Airfare	04/18/2013	\$471.80	 This expense has no matching travel reservation. Please import trips and apply the booking or use the expense report comments to explain why there was no reservation made for this expense.

Expenses Delete Copy View Smart Expenses

All Cards Import Match Unmatch Delete

Expense Detail Expense Date Amount

Expense	Date	Amount
Travel, Inc. Duluth For Travel Agent	04/16/2013	\$9.02
US Airways Airfare	04/16/2013	\$414.80

TOTAL AMOUNT \$480.82 TOTAL REQUESTED \$480.82

- The Expense data for that item will appear

# TTE FAQ Spotlight

## November 2013

My Concur Travel Expense Reporting Administration Profile

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

Training April 2013 Delete Report Submit Report

New Expense Import Details Receipts Print / Email Hide Exceptions

**Exceptions**

Expense	Date	Amount	Exception
Airfare	04/18/2013	\$471.80	<span>!</span> This expense has no matching travel reservation. Please import trips and apply the booking or use the expense report comments to explain why there was no reservation made for this expense.

**Expenses**

Date	Expense	Amount	Requested
04/18/2013	<b>Airfare</b> Alaska Airlines Inc., Seattle WA USA	\$471.80	\$471.80
04/16/2013	<b>For Travel Agent</b> Travel Inc., Duluth, Minnesota	\$9.02	\$9.02

TOTAL AMOUNT: \$480.82 | TOTAL REQUESTED: \$480.82

**Expense**

Expense Type: Airfare | Transaction Date: 04/18/2013

Purpose of Trip: Training Test | Ticket Number: 0277179905650

Vendor: Alaska Airlines Inc., Seattle WA USA | Vendor Name: Alaska Airlines Inc., Seattle WA USA

City:

Payment Type: AirPlus | Amount: 471.80 | USD

Trip Type: Out of State Travel

Comment:

Save Itemize Attach Receipt Cancel

- o Enter any missing required data.
  - In our example the City was missing. City is a required data field in this example. For this expense it is looking for the city where the flight originated. If it had been a hotel, it would be the city where the hotel is located.
- o If you did not have a matching Travel Reservation you **must** enter an explanation why the reservation was not made through TTE.
  - This could be a ticket you purchased at the airport for an unscheduled trip and you had no access to TTE. For a hotel this could be that the only way you could reserve the room and get the special rate was booking directly through the hotel or conference management company.
  - Whatever the reason, be specific in your explanation.
- o Attach any required receipts
- o Click on **Save** to update the Expense Entry.