

# 2013

## TTE FAQ Spotlight – September



### Top 5 Support Questions Last Month

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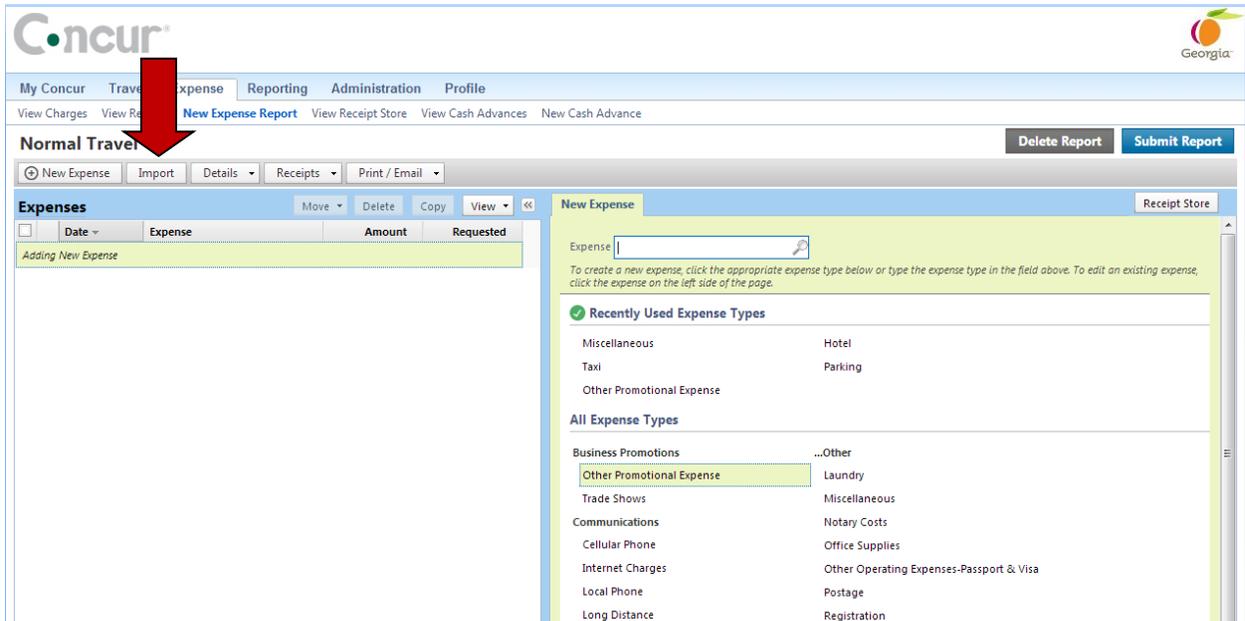


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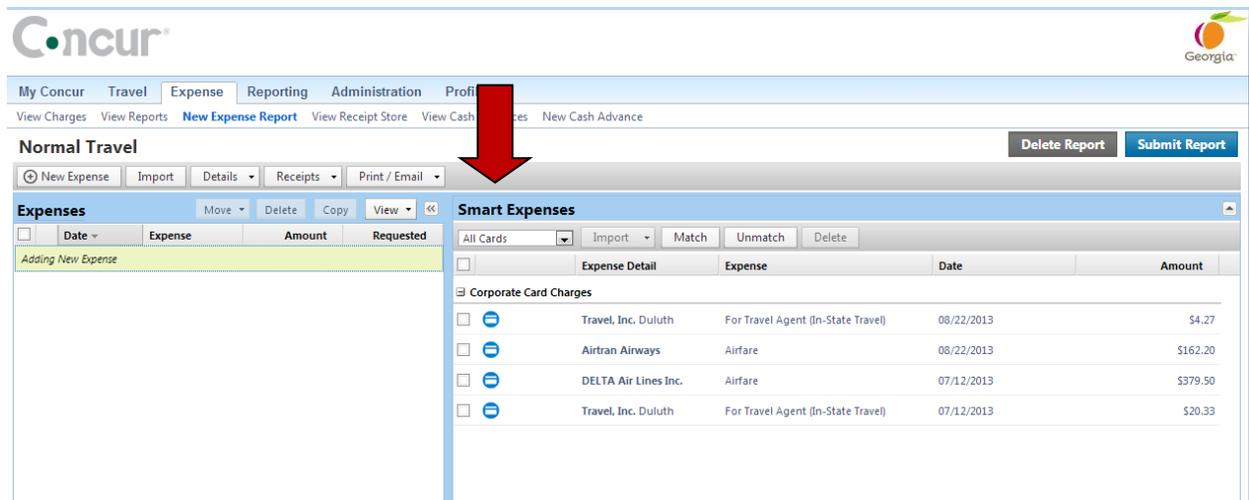
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### 1. How do I import Smart Expenses into an Expense Report?

- o On the **My Concur** page in the **Expense Report** or **Active Work** section click on an existing Expense Report to open it or create a new expense report.
  - If this an Existing Expense Report click on the **Import** tab to display Smart Expenses



- If this as a new Expense Report available Smart Expenses will automatically display:





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- Click in the check box next to the items you want to import into the Expense Report.

The screenshot shows the Concur Expense Report interface. The 'Smart Expenses' table is visible with the following data:

	Expense Detail	Expense	Date	Amount
<input checked="" type="checkbox"/>	Travel, Inc. Duluth	For Travel Agent (In-State Travel)	08/22/2013	\$4.27
<input checked="" type="checkbox"/>	Airtran Airways	Airfare	08/22/2013	\$162.20
<input type="checkbox"/>	DELTA Air Lines Inc.	Airfare	07/12/2013	\$379.50
<input type="checkbox"/>	Travel, Inc. Duluth	For Travel Agent (In-State Travel)	07/12/2013	\$20.33

A red arrow points to the checkboxes in the first two rows.

- Click on the **Import** button.

The screenshot shows the Concur Expense Report interface. The 'Import' button in the 'Smart Expenses' section is highlighted with a red arrow.

- If you click on the Import button drop down arrow instead of the button itself you will be asked to choose from importing the transactions **To Current Report** (Current Report is the report you have open) or **To New Report**. 99.999% of the time you would select Current Report.
  - You will not see this option if you click on the button and not the drop down arrow.

The screenshot shows the Concur Expense Report interface. The 'Import' dropdown menu is open, showing the options 'To Current Report' and 'To New Report'. A red arrow points to the dropdown menu.

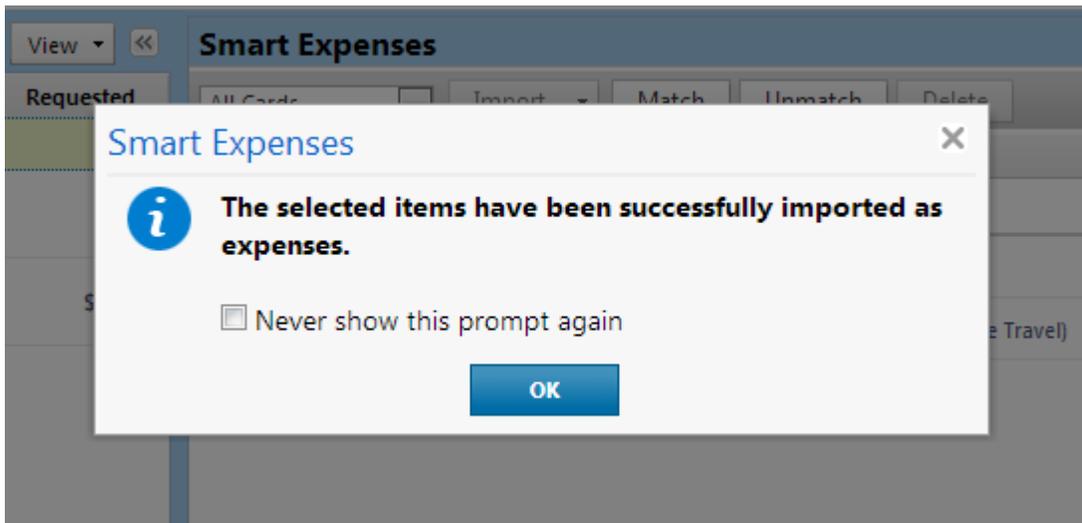




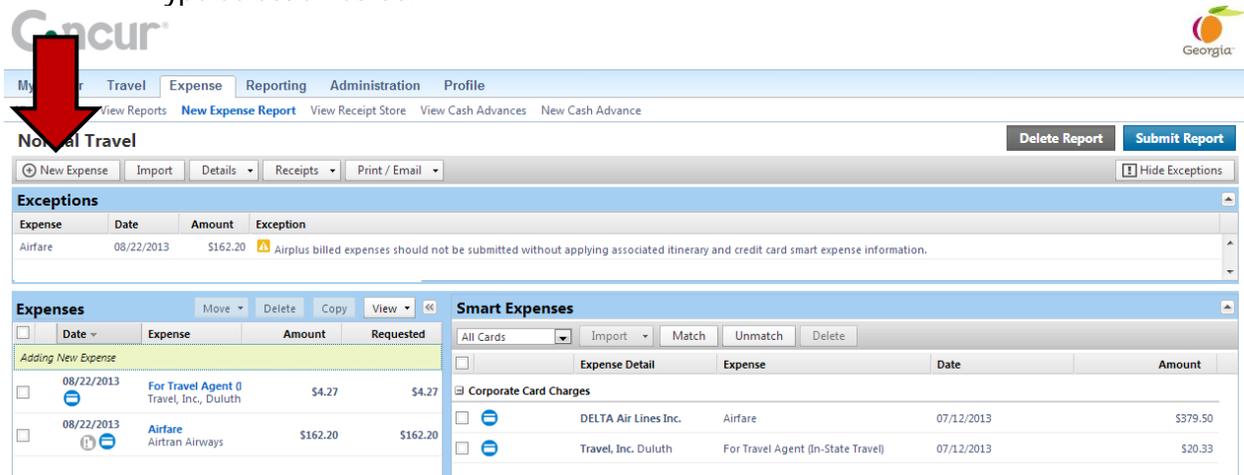
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- o Click **OK** if a Smart Expenses success dialogue pops up



- o The selected Smart Expenses will now appear in your Expense Report
  - To enter other expenses, click on the **New Expense** tab to display the Expense Type selection screen.



## 2. 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.





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My Concur Request Expense Profile

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

Nov 3-16 Travel Delete Report Submit Report

+ New Expense Details Receipts Print / Email Hide Exceptions

**Exceptions**

Expense	Date	Amount	Exception
Office Supplies	11/03/2012	\$30.00	The Transaction Date is Greater than 30 days old. Please be more timely in your expense submissions.
Personal Car Mil...	11/04/2012	\$124.32	The Transaction Date is Greater than 30 days old. Please be more timely in your expense submissions.

**Expenses** Delete Copy View

Date	Expense	Amount	Requested
11/13/2012	Fixed Meals Moultrie, Georgia	\$21.00	\$21.00
11/12/2012	Fixed Meals Valdosta, Georgia	\$21.00	\$21.00
11/08/2012	Personal Car Mileage	\$1 37.09	\$1 37.09
11/08/2012	Hotel Comfort Inns, Savannah, Georgia	\$2 30.00	\$2 30.00
11/08/2012	Tolls Savannah, Georgia	\$1.00	\$1.00
11/07/2012	Personal Car Mileage	\$1 31.54	\$1 31.54
		TOTAL AMOUNT	TOTAL REQUESTED
		\$1,088.12	\$1,088.12

**New Expense** Receipt Store

Expense: pers

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**

- Cash Advance Return
- Personal Car Mileage
- Miscellaneous
- Tolls
- Hotel

**All Expense Types**

**Transportation**

- Personal Car Mileage

- 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.
  - Click on **Mileage Calculator** to continue





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Nov 3-16 Travel Delete Report

New Expense

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	\$1,37.09	\$1,37.09
<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	\$1,31.54	\$1,31.54
<input type="checkbox"/>	11/06/2012	Personal Car Mileage	\$1,37.64	\$1,37.64
<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:

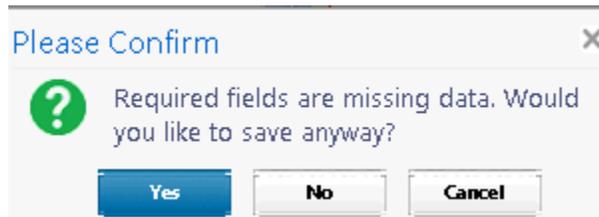
---

Vehicle ID: Personal Car Tier1 Number of Passengers: 0

Distance to Date: 0

[Mileage Calculator](#)

- If the following dialog box appears select **Yes**.



- 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:





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

**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, U
- E

Calculate Route **Make Round Trip**

**Directions**

A 100 Spring Drive, Roswell, GA 30075, USA

62.0 mi - about 1 hour 12 mins

1. Head **north** on **Spring Dr** toward **GA-120 E** 348 ft
2. Turn **left** onto **GA-120 W** 8.8 mi
3. Exit onto **GA-120 loop W/North Marietta Pkwy NE** toward **I-75 N** 1.5 mi
4. Turn **right** to merge onto **I-75 N** 24.9 mi
5. Take exit **290** for **GA-20 W** 0.4 mi

<input type="checkbox"/> Deduct Commute	TOTAL PERSONAL	TOTAL BUSINESS
	0.0 MI	91.5 MI

**Add Mileage to Expense** **Cancel**

- 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** distance will be reduced by this same amount.





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Mileage Calculator

Avoid Tolls  Avoid Highways

**Waypoints** Distances Personal

A 100 Spring Drive, Roswell, GA 30075, US	61.9 MI	<input type="checkbox"/>
B 2 East Main Street, Rome, GA 30161, US	18.4 MI	<input type="checkbox"/>
C Cedartown, GA 30125, USA	11.2 MI	<input type="checkbox"/>
D Main Line Road, Rockmart, GA 30153, U	49.3 MI	<input type="checkbox"/>
E 100 Spring Drive, Roswell, GA 30075, US		
F		

[Calculate Route](#)

**Deducted Commute Distance**

**Home**  
100 Spring Drive, Roswell, GA 30075, US

**Office**  
200 Piedmont Avenue SE, Atlanta, GA 3

Deduct Round Trip

**Directions**

<input checked="" type="checkbox"/> Deduct Commute	TOTAL PERSONAL	TOTAL BUSINESS
	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**





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**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, U: 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 3:  Deduct Round Trip

**Directions**

Deduct Commute

TOTAL PERSONAL	TOTAL BUSINESS
43.0 MI	97.8 MI

[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 your agency requires documentation such as the DOAS Car Cost Comparison form 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.





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My Concur Request Expense Profile

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

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 checked="" type="checkbox"/>	11/13/2012	Personal Car Mileage	\$0.00	\$0.00
The Transaction Date is Greater than 30 days old. Please be more timely in your expense submissions. Missing required field: From Location, To Location.				
<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		
			TOTAL AMOUNT	TOTAL REQUESTED
			\$1,088.12	\$1,088.12

Expense

View Reimbursement Rates

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

Purpose of the Trip: Normal Travel From Location: 100 Spring Drive, Roswell, GA 30075

To Location: Main Line Road, Rockmart, GA 30153 Payment Type: Out of Pocket

Distance - Amount: 98 54.39 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

- 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

My Concur Request Expense Profile

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

Nov 3-16 Travel Delete Report Submit Report

New Expense Details Receipts Print / Email Show Exceptions

Expenses	Date	Expense	Amount	Requested
Adding New Expense				
<input type="checkbox"/>	11/13/2012	Fixed Meals Moultrie, Georgia	\$21.00	\$21.00
<input checked="" type="checkbox"/>	11/13/2012	Personal Car Mileage	\$54.39	\$54.39
<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
			TOTAL AMOUNT	TOTAL REQUESTED
			\$1,142.51	\$1,142.51

New Expense

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
- Cash Advance Return
- Miscellaneous
- Tolls
- Hotel

**All Expense Types**

**Business Promotions**

- Other Promotional Expense
- Trade Shows

**Cash Advance**

- Cash Advance Return

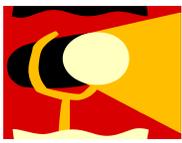
**Communications**

- Cellular Phone
- Internet Charges
- Local Phone
- Long Distance

**Company Car Expense**

- Company Car Fuel
- Company Car Maintenance





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### 3. How do I locate the name of my Agency Local Travel Administrator?

- Log in to the SAO website: <https://sao.georgia.gov>
- Select the **Travel** Tab
- Select **TeamWorks Travel and Expense**

GEORGIA.GOV

About Us | Contact Us | Site Map | Translate

## State Accounting Office

Search within this site

TeamWorks | Statewide Reporting | Shared Services | Policies and Procedures | **Travel** | Training & Calendars

### TeamWorks Travel and Expense

The State of Georgia is beginning to consolidate travel arrangements by using the Concur Travel and Expense Management System.

READ MORE →

1 2 3 4

- State Travel Policy
- TeamWorks Travel and Expense
- TeamWorks Travel and Expense Training
- Non TeamWorks Travel System Users
- Travel News Sign Up

- Select **Online Booking Tool**

TeamWorks | Statewide Reporting | Shared Services | Policies and Procedures | **Travel** | Training & Calendars

## Travel

Home » Travel » TeamWorks Travel and Expense

### TeamWorks Travel and Expense

The State of Georgia is consolidating travel arrangements by using the online Travel and Expense Management System to make travel arrangements (book airfare, hotel accommodations, car rental, etc.), and is used in conjunction with Travel Inc, the TeamWorks Travel & Expense designated travel agency.

Implementation Overview

Online Booking Tool

Travel News

Travel Related Links & Resources

TeamWorks Travel and Expense Training

Time to Adopt the TTE System?

Stay Connected





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- Select TTE Participating Agencies

The screenshot shows the TTE Online Booking Tool interface. The navigation bar includes TeamWorks, Statewide Reporting, Shared Services, Policies and Procedures, Travel, and Training & Calendars. The main content area is titled 'Online Booking Tool' and lists several links: Log in to TTE, TTE Travel Request, New State of GA Travelers \*\*START HERE\*\*, **TTE Participating Agencies** (circled in red), Hotel-Motel Tax Exemption Form, Waiver Form/DOAS, Car Cost Compare/DOAS, and Travel Contacts. A 'Stay Connected' sidebar with an RSS icon is also visible.

- A list of designated TTE Local Travel Administrators with contact information will display

The screenshot displays the 'TeamWorks TRAVEL & EXPENSE PARTICIPATING AGENCIES LOCAL ADMINISTRATORS' page. It features the State of Georgia seal and a table with the following data:

Agency	Name	Email Address
State Accounting Office	Monica Bradshaw	mbradshaw@sao.ga.gov
Audits	Carol Schwinne	schwinne@audits.ga.gov
Banking & Finance	Renee Martin	rmartin@dbf.state.ga.us
Economic Development	Dawn Schlich	dschlich@georgia.org
Dept of Community Affairs	Marcia Paul	financesc@dca.ga.gov
Dept of Community Affairs	William Dews	financesc@dca.ga.gov
Dept of Community Health	Angela Bolton	abolton@dch.ga.gov

#### 4. What should I do if I have access to a less expensive hotel rate than available in TTE?

Hotels allot a specific number of rooms to be available at specified rates for online booking. When that capacity has been reached, the rate is no longer available online.





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When this occurs, you have the option to contact the hotel directly to get the hotel at the lesser or conference rate. If you have access to a rate not published in TTE, please advise your TTE Local Travel Administrator. SAO will have an online form allowing you to send this directly to the TTE Travel Group in the near future.

### 5. 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.

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

The screenshot shows the Concur Expense Center interface. The user is logged in as William Abercrombie. The main report is titled "Instate Travel 7-16 to 31 Sgl". The "Details" tab is selected, and a dropdown menu is open over the "Travel Allowances" section, with "New Itinerary" highlighted. The interface shows a table of expenses with columns for "Amount" and "Requested", and a "New Expense" form on the right.

Expense	Date	Amount	Requested
Fixed Meals	07/26/2013	36.00	\$36.00
	07/26/2013	73.46	\$173.46
	07/24/2013	45.77	\$45.77
	07/23/2013	28.00	\$28.00
TOTAL REQUESTED		\$357.00	\$357.00

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

### 6. What's New In TTE?

#### Expense Delegates Can Now Email Receipts to Receipt Store

Any delegate who has verified their email address for Receipt Store in the Profile tab, and is a valid delegate for another TTE user, can now send a receipt image to the that user's Receipt Store. Simply send an email to Receipt Store ([receipts@concur.com](mailto:receipts@concur.com) or



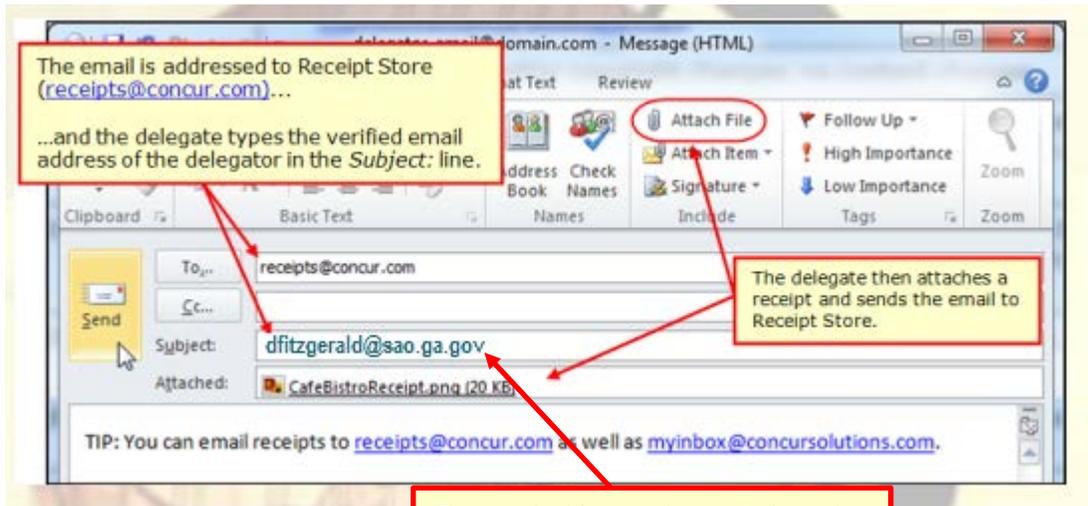


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[myinbox@concur.com](mailto:myinbox@concur.com)) with the verified email address of the person you are a delegate for listed on the Subject line of the email.

Please note that the delegate CANNOT actually attach any images from Receipt Store for the individual they are an expense delegate for. Only the person submitting the expense report has the authority to do that.



The email address is the verified email address of the person who will submit the expense report

