TeamWorks

Travel and Expense

What's New in TeamWorks Travel & Expense 2012

Contents

What's New in TTE – Sept. through Dec. 2012

Section 1: Overview

The following features are available on the TTE system as now

- **Receipt Images: Allow More Than One Image for Expense Entry**
  More than one image can now be associated at the expense entry level of the expense report.
- **Login: View Login History**
  You can now view the history of your logins to TTE.
- **Expense: Personal Mileage – Mileage Calculator**
  You can now view the history of your logins to TTE!
- **Expense: Select and Change Multiple Custom Fields in a Single Action**
  Custom fields shared across forms as a common Custom field can now be selected and changed to a different value in a single action.
- **Expense: Most Recently Used List for Expense Types**
  A Most Recently User (MRU) function lets you choose your expense type from a list of those you have used in the recent past.
- **Expense: New Summary View Shows Subtotal for all Allocations in a Report**
  A new Summary button lets a user open a window that displays a summary of subtotals for all allocation records across all expenses (including the system allocation records) in the expense report.
- **Delegate Notify Employee Enhancements**
  The Notify Employee function used by delegates to "preview" a report and notify the employee the report is ready now includes new functionality for this release.

Section 2: TTE Expense System

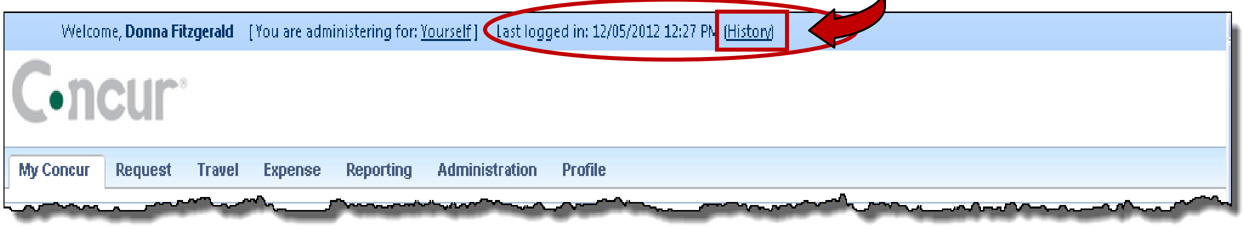
Log In: View individual login history

How It Works

The login status line now includes the date you last logged in and access to login history.

> ***Business Purpose***
>
> *This enhancement provides historical login data for users.*

- Click on the **History** hyperlink



- The Login History displays

Login History

Login Time	IP Address	Network Location*
12/06/2012 10:40 AM	167.192.89.2	Douglasville, GA, US
12/05/2012 12:27 PM	167.192.89.2	Douglasville, GA, US
11/19/2012 8:46 AM	167.192.89.2	Douglasville, GA, US
11/08/2012 9:15 AM	167.192.89.2	Douglasville, GA, US
10/23/2012 12:00 PM	167.192.89.2	Douglasville, GA, US
10/17/2012 12:46 PM	167.192.89.2	Douglasville, GA, US
10/17/2012 8:01 AM	167.192.89.2	Douglasville, GA, US
10/16/2012 3:33 PM	167.192.89.2	Douglasville, GA, US
10/16/2012 8:52 AM	167.192.89.2	Douglasville, GA, US
10/09/2012 11:10 AM	167.192.89.2	Douglasville, GA, US
09/21/2012 3:56 PM	167.192.89.2	Douglasville, GA, US
09/21/2012 12:34 PM	167.192.89.2	Douglasville, GA, US
09/21/2012 12:27 PM	167.192.89.2	Douglasville, GA, US
09/21/2012 12:25 PM	167.192.89.2	Douglasville, GA, US
09/21/2012 12:24 PM	167.192.89.2	Douglasville, GA, US

* - Reported Network Location may be different from the user actual location

Click on the **X** in the upper right hand corner of the box to exit History.

Expense: Attach More Than One Image to an Expense Entry

Overview

The restriction allowing one receipt image for each expense entry is now removed, and the employee can now append as many receipt images as

> ***Business Purpose***
>
> *This enhancement improves usability for users.*

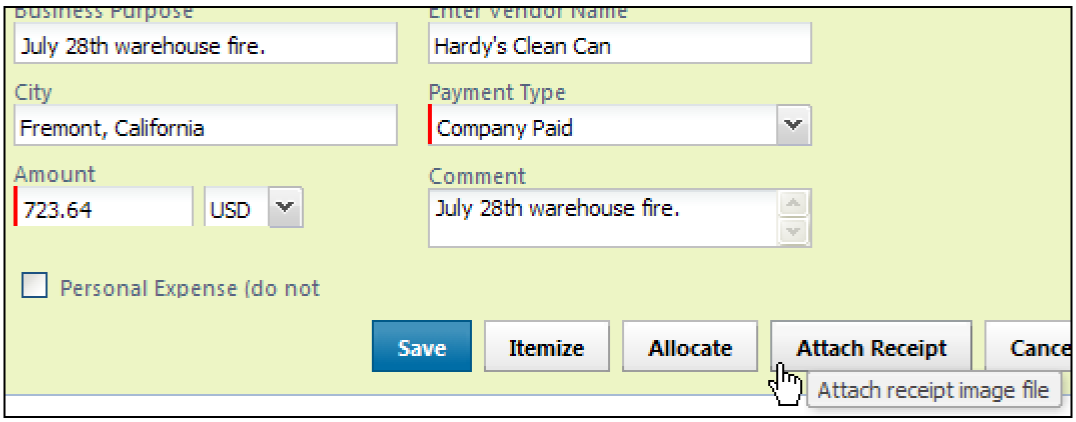
required to substantiate their expenses at the expense entry level.

How It Works

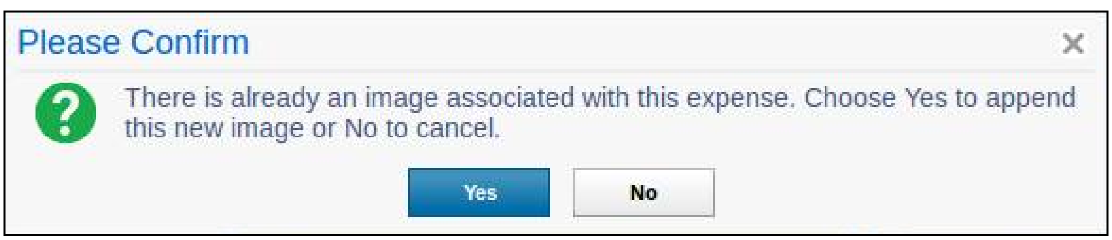
Appending an additional image works exactly the same as attaching the initial (first) image, except that the system will ask if you want to append an additional image along with the existing image(s). Note that you must add each receipt image separately.

Example

The employee creates the expense report and, with the entry open, attaches the initial image using the **Attach Receipt** button:



When the user elects to add a second image, the **Attach Receipt** button is again used; however, the following message appears, allowing the user to decide if they wish to add an additional receipt image (Yes), or cancel the action (No):



Once the image is appended to the existing (prior) image(s), all images are merged together and cannot be separated.

If the user wants to replace the image attached to the expense with a different one, the process has not changed. The user must first detach the existing image from the entry and then attach the new image.

To delete an image, the user uses the following existing options:

- Click the **Receipt Image** tab, then click **Detach From Entry**
- Hover over the receipt image icon, then click **Detach From Entry**

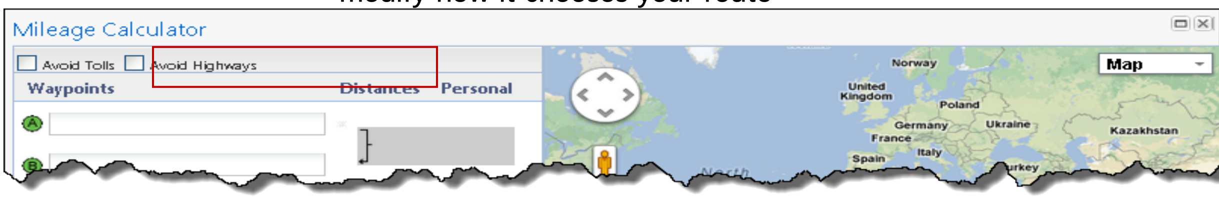
After detaching the image, it is moved to Receipt Store for use later, or deletion if you prefer. Note that, if multiple images were added to an expense entry, <u>all</u> are detached, and are retained in Receipt Store.

> ***Business Purpose***
>
> *This enhancement provides historical login data for users.*

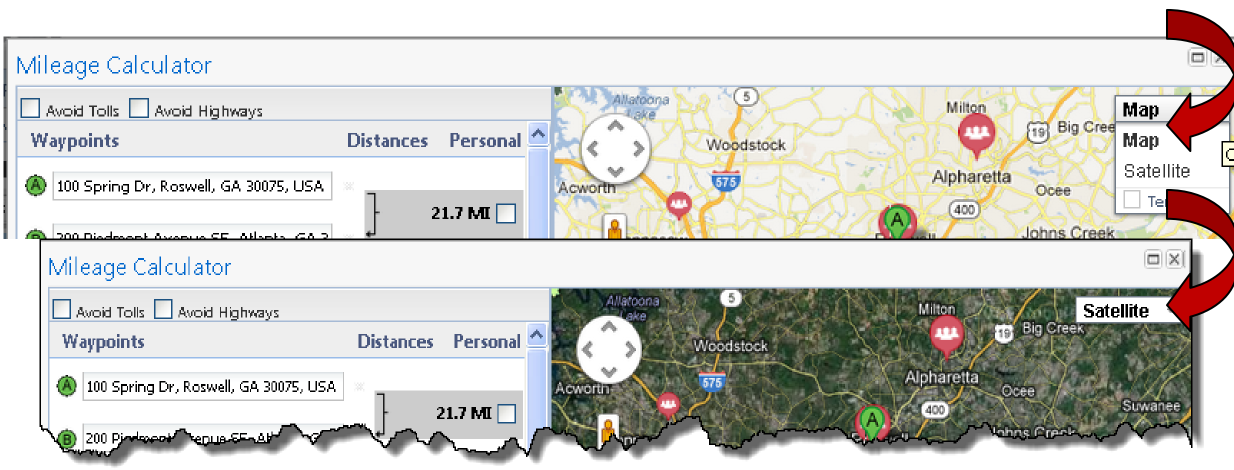
How It Works

New options went into effect to make tracking your Personal Mileage easier:

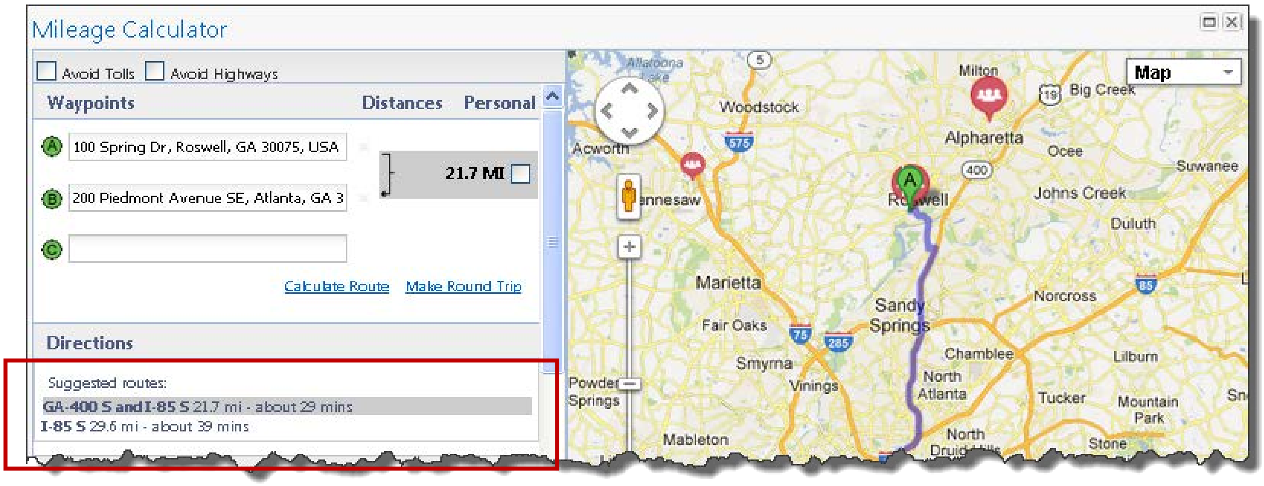
- Avoid Tolls and or Highways – simply click the box and the system will modify how it chooses your route



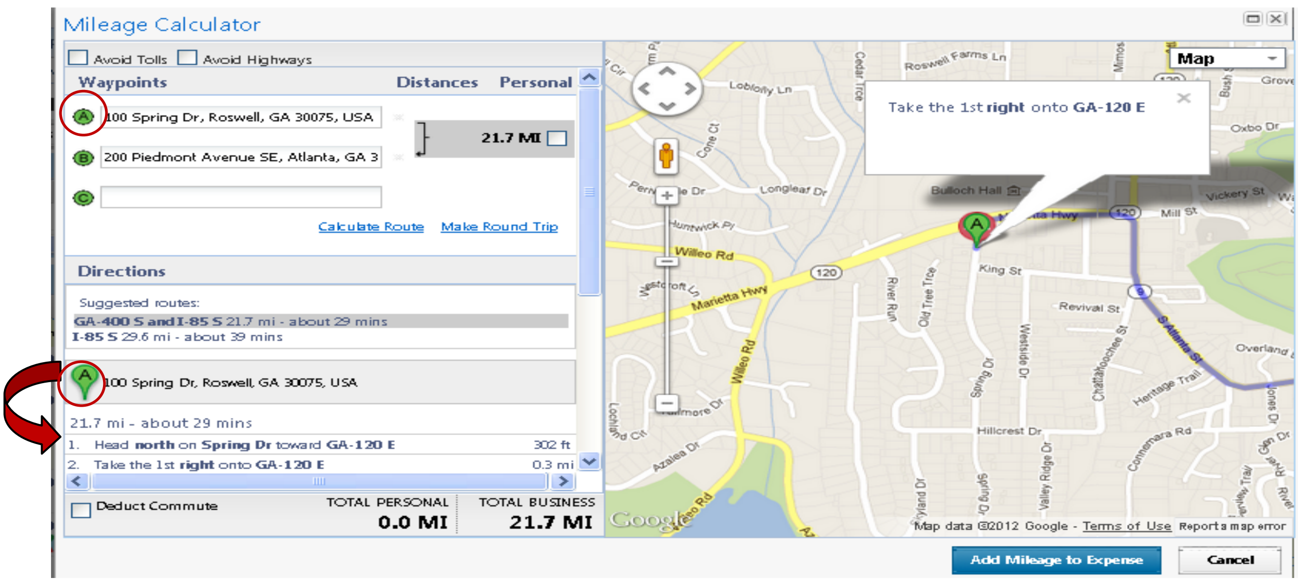
- Change Map Style – click on the Map drop down arrow and select Map or Satellite view



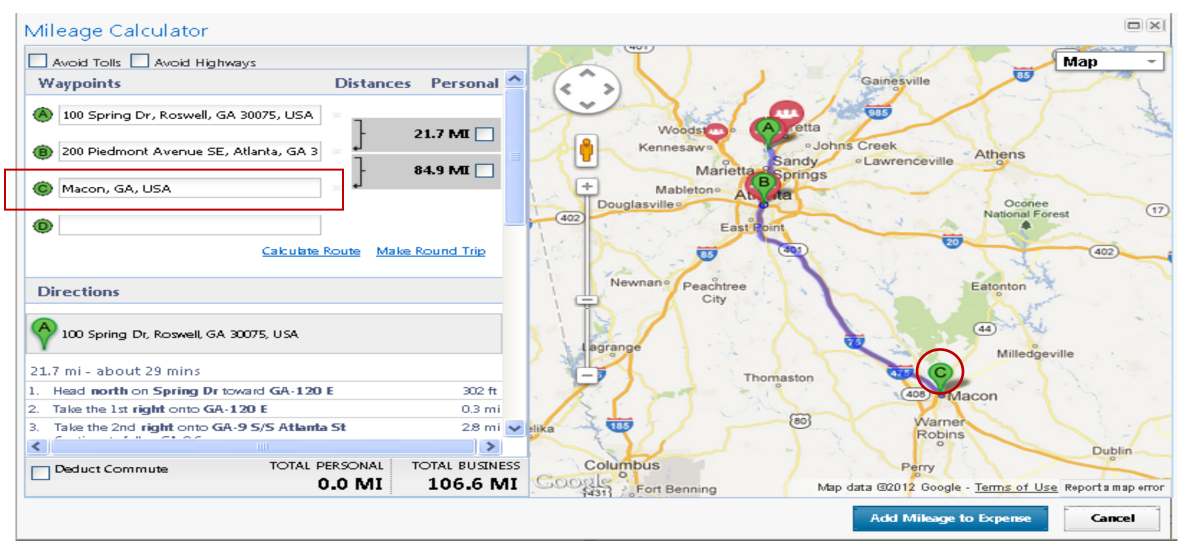
- Suggested Routes– click on the route to view it! Notice you can see the time and mileage differences before you click. This should help you choose the route that most closely represents the actual route you took. These are toggles so if you change your mind, click on the other one and it will toggle to it!



- Directions– Specific directions from waypoint to waypoint. Click on any line of the directions to view a specific map of the directions!



- Enter a waypoint without a specific address – just enter the city and state



- Drag routes on maps to make changes – Click on the route at any point and drag it to where you need it to go. In this example I dragged the route to Thomaston which you can see is not in the waypoint list and it adjusted the mileage.

Expense: Expense Types Most Frequently Used

Overview

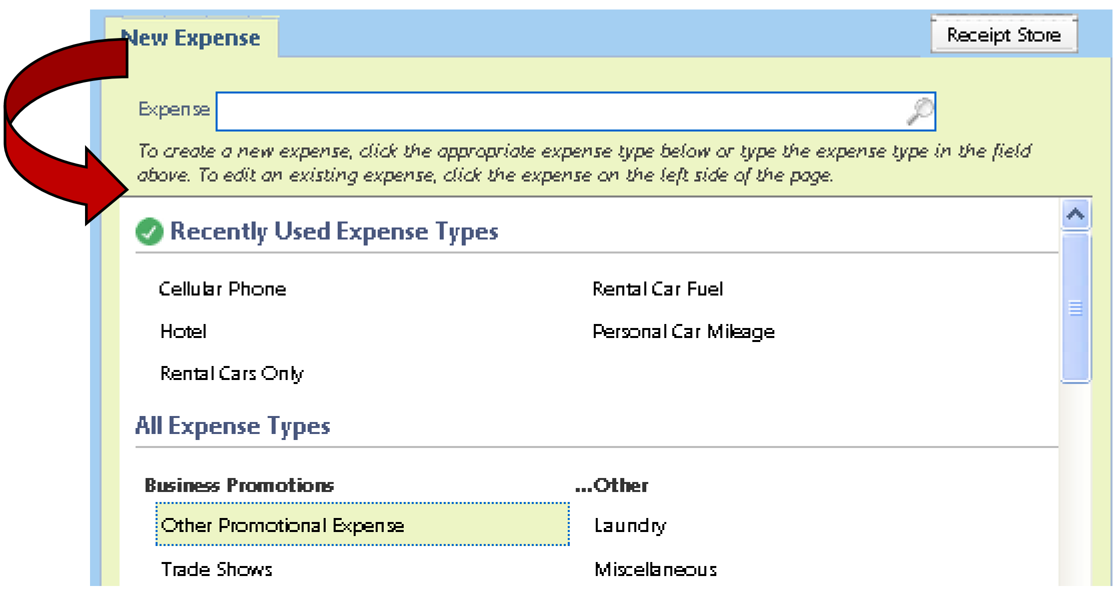
Business Purpose

This enhancement speeds the report creation process by displaying a list of most used expense types.

Users creating an expense report can now choose from a list of their most recently used expense types. This feature lets the user quickly select an expense they've used in the recent past, or are using repetitively, speeding the overall report creation process.

How It Works

On first use no expense types are listed, as none have yet been chosen. However, once the first expense type is selected for a report, that selection becomes the first expense type listed in the area directly above **All Expense Types**, as shown in the figure below:



Each different expense type is added following its selection, and the system drops the "last used" to retain a total of five different expense types at any time. These expense types are based on the user's Policy, so the selection is also based on the Policy under which the report is being created.

Expense: Select & Change Multiple Fields in a Single Action

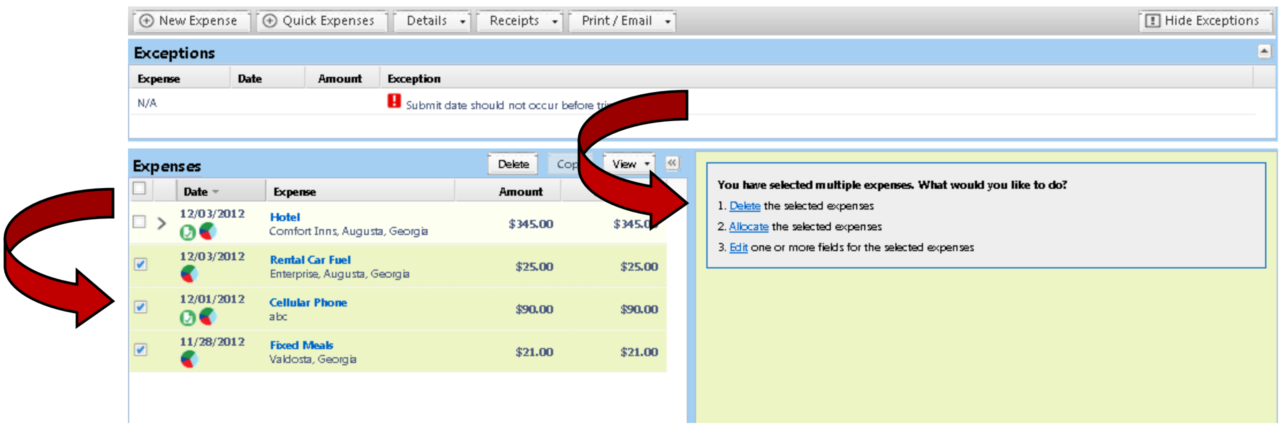
Overview

> ***Business Purpose***
>
> *This enhancement provides more speed of entry options for users.*

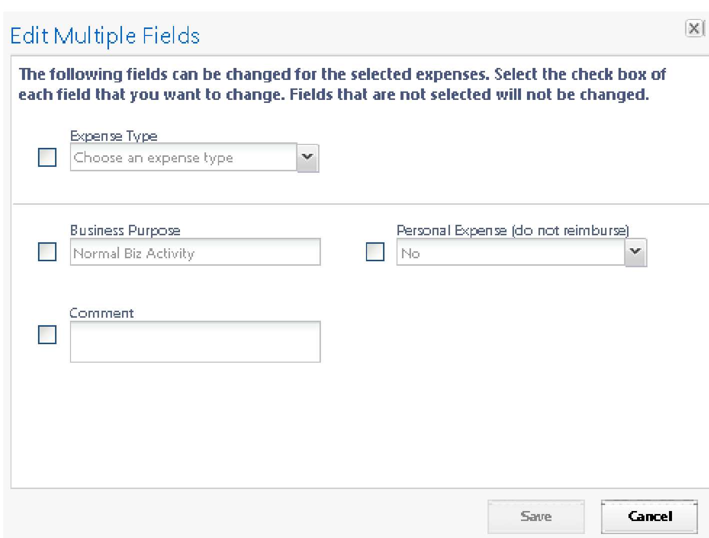
The multiple expense edit feature lets a user select multiple expense entries for a report and then edit the data for shared fields so that the same value appears for all. With this release, Custom field types are now included in the fields that can be edited across multiple selected entries.

Configuration

In the example below, several expenses have been added to the Expense Report. Selecting several entries, the available options for the selected items are displayed to the right as shown in the figure below:



Note you can 1.)Delete all these items, 2.) Allocate the selected expenses or 3.) Edit one or more fields for the selected expenses



In selecting the Edit function we change the Expense Type for the selected items, change the Business Purpose for the selected items only, change the Personal Expense (do not reimburse) option or add a comment and attach it to the selected items.

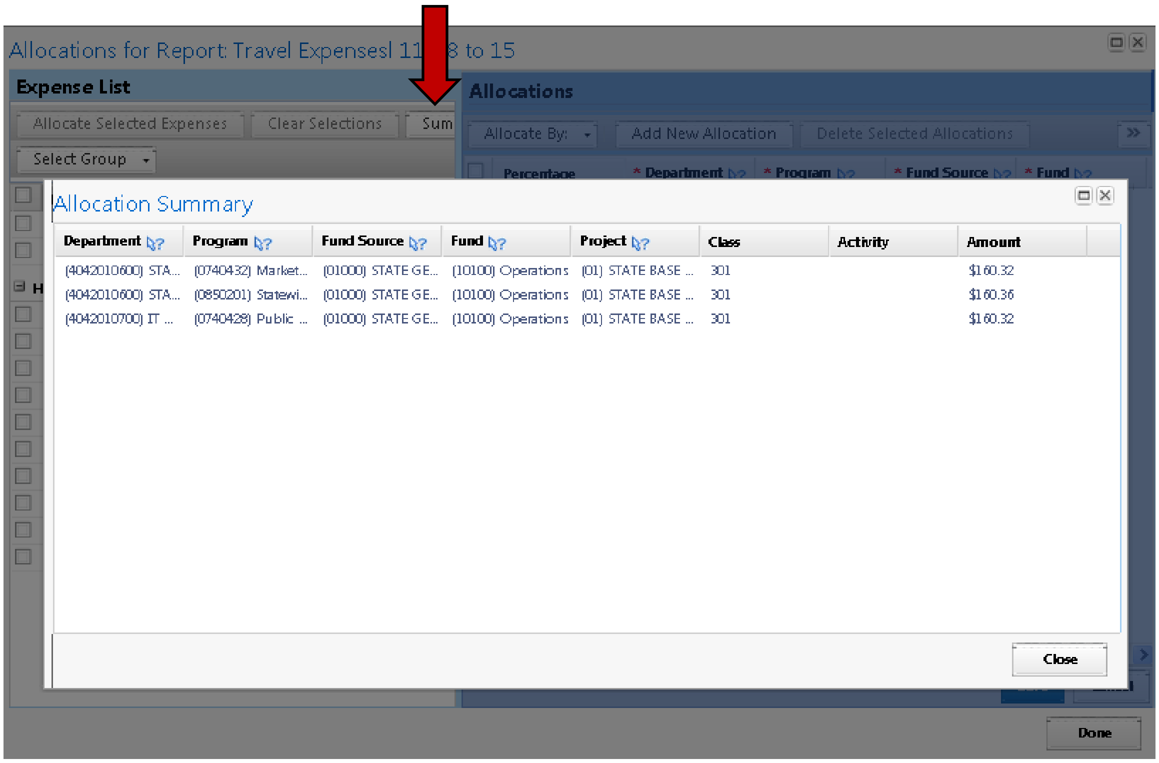
Expense: New Summary View Shows Subtotal for all Allocations in a Report

Overview

Business Purpose

This enhancement provides Allocation summary totals in a separate window.

A summary view of all allocations <u>within</u> an expense report can now be viewed using a new **Summary** button which appears when you open the Allocations feature from the **Details** tab. Selecting this button provides a view for the user (Approver, Processor, etc.) that lists all allocations for the expense report in subtotal format.



Open the Expense report; select the **Details** tab; select **Allocations;** select **Summary**.

Expense: Delegate Enhancements When Previewing a Report for Employee

Overview

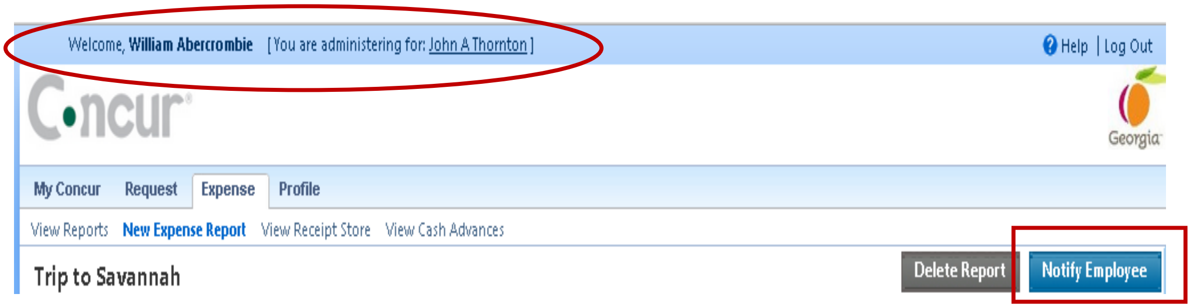
Business Purpose

This enhancement provides visual cues that a report is ready for review.

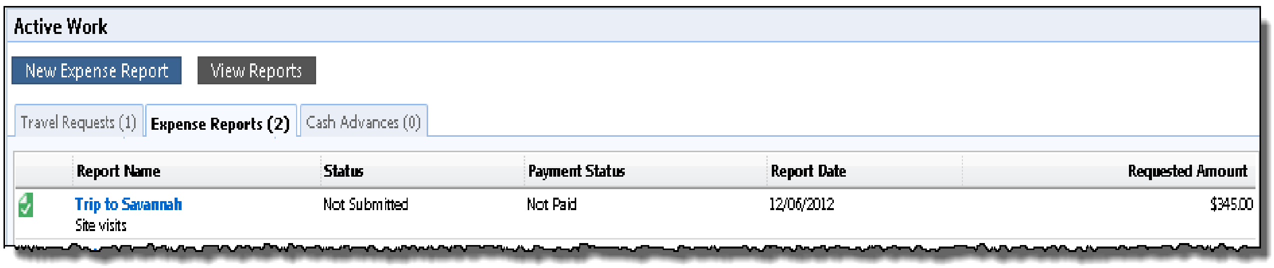
Several enhancements are now added for the delegate with Can Prepare an Expense Report but not Submit the Expense Report for another Employee.

They are:

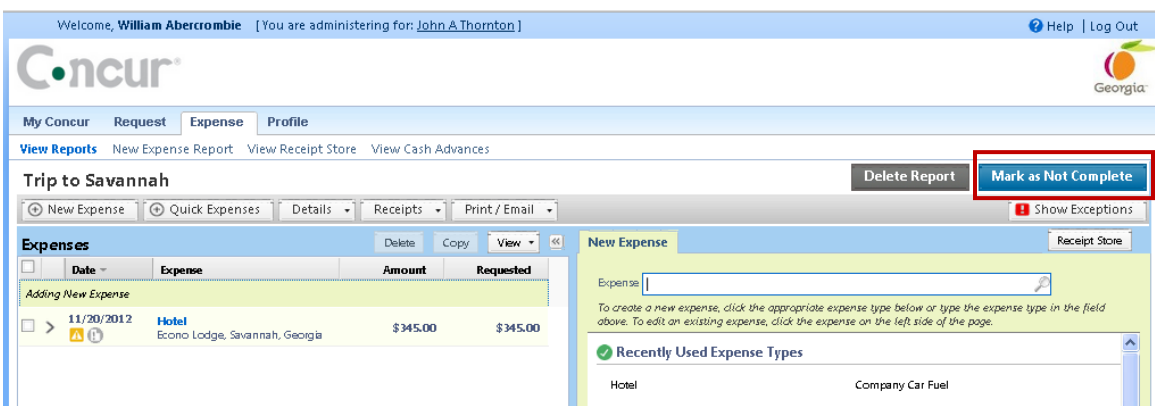
- The Delegate will have an option to notify the employee they have done work on behalf of.



- The addition of a new icon ( ) that appears next to any report reviewed by the delegate who has used the **Notify** button to alert their delegator that the report has been reviewed. This icon is visible to all users who may view this queue, both delegates and the employee.

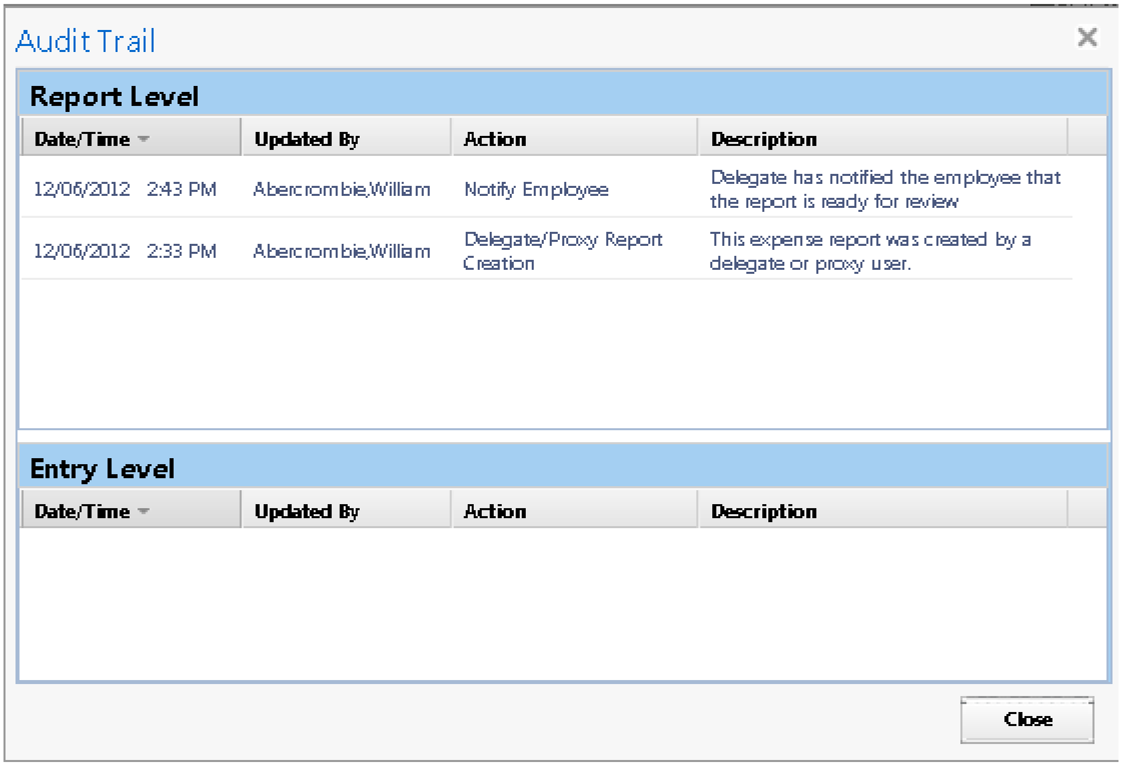


- The ability of the Expense Delegate to reverse the notification for a selected report using the new **Mark as Not Complete** button, which removes the "reviewed" icon ( ) from the report row so the employee knows the report has not been completed by the delegate.



NOTE: If the delegate marks the report as ***not*** reviewed, the icon is removed from the report in the employee's report queue. It does not, however, recall the email notification to the employee nor does it send an updated email to the employee.

- The addition of an audit trail entry whenever the delegate clicks the **Notify** button to alert their delegator that the report has been reviewed.


Audit Trail
Report Level
Date/Time
Updated By
Action
Description
12/06/2012 2:43 PM
Abercrombie,William
Notify Employee
Delegate has notified the employee that the report is ready for review
12/06/2012 2:33 PM
Abercrombie,William
Delegate/Proxy Report Creation
This expense report was created by a delegate or proxy user.
Entry Level
Date/Time
Updated By
Action
Description
Close

Section 3: Travel Discounts

SAO is always looking for new ways to reduce expenses for our state business travelers!

Delta / Southwest Airlines

Delta offers discounts between 2-12 percent for domestic and 5-30 percent for international business travel.

- NOTE: This discount is only available for state business travel and only available for TTE users.

Southwest offers discounts at 10 percent

- NOTE: Southwest is also offering a promotional Status Match offer which recognizes your elite status from any other carrier.
- NOTE: This discount is only available for state business travel and only available for TTE users

Parking Spot

ALL State of Georgia employees are eligible for 25% off regular daily parking rates at the **Parking Spot** (Atlanta location only).

This discount is available for personal travel.

LaQuinta Inns

ALL State of Georgia employees are eligible for 12% discounts on stays at **LaQuinta Inns & Suites**.

Section 4: TTE System Supported Configurations

The following configurations are either supported or no longer supported as of the November 21 release:

The following configurations are either supported or no longer supported with this service release.

Certifications for This Release

Support for Firefox v. 15.0.0

Support for Firefox versions 15.0.0 under both the Mac OS X and Microsoft Windows operating systems is certified for this release.

Support for Google Chrome v. 21.0

Support for Google Chrome version 21.0 under both the Mac OS X and Microsoft Windows operating systems is certified for this release.

Upcoming Certifications

Support for Internet Explorer v. 10.0 and Windows 8

Support for Internet Explorer 10.0 under Microsoft Windows version 8.0 will be included in an upcoming release.

Support for Chrome v 23.0

Support for Chrome 23.0 under both the Mac OS X and Microsoft Windows operating systems will be included in an upcoming release.

Support for Firefox v. 16.0

Support for Firefox versions 15.0 under both the Mac OS X and Microsoft Windows operating systems will be included in an upcoming release.

Support for Safari 6.0 with Mac OS X 10.8

Support for Safari 6.0 under Mac OS X version 10.8 will be included in an upcoming release.