TeamWorks: Travel and Expense System

Powered by Concur Technologies

What's New in TeamWorks Travel & Expense 2014

Contents

What's New in TTE – March 2014

Section 1: Delegate Can Email Receipts to the Receipt Store

Overview

Any delegate with a verified Receipt Store email address can send receipt images to the Receipt Store on behalf of a user (delegator). The user can later access those images in his/her Receipt Store repository and attach them to an expense report.

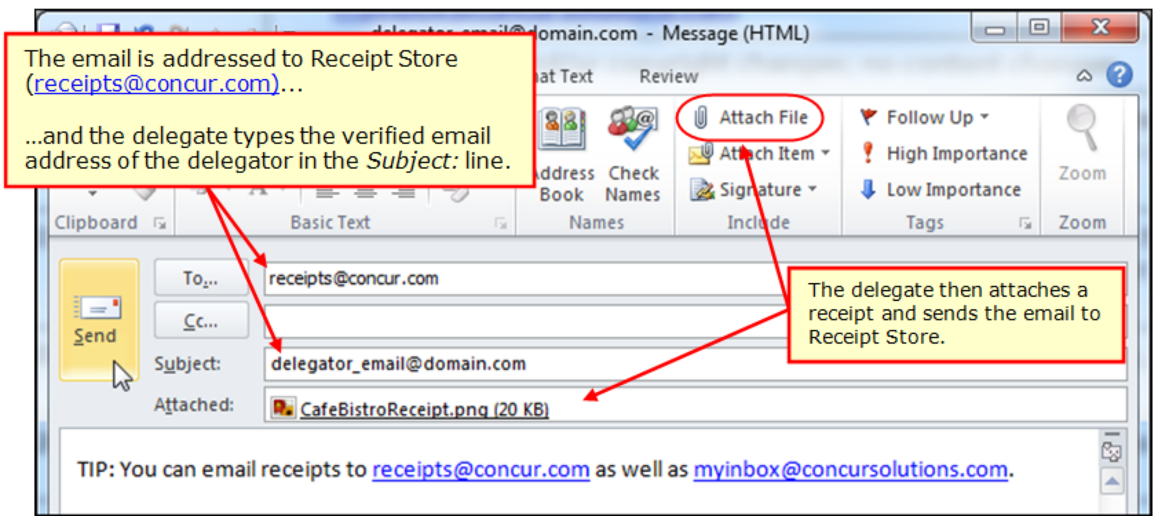
What the Delegate Sees

The delegate follows these steps.

NOTE: This process only works if the delegate is sending images for one of his/her designated users.

To send receipt images to the user's Receipt Store repository:

1. Prepare the email and attach or embed the receipt image.
2. Type the email address of the user (delegator) in the Subject line.
3. Send the email.



The system:

- Confirms that both the delegate and the user (delegator) have verified Receipt Store email addresses
- Confirms that a delegate-to-delegator relationship exists

Then:

- If ***both*** verification steps are found to be true, the image is added to the user's repository.
- If there is no valid relation between the delegate and delegator, the image is added to the *delegate's* repository.
- If the delegate does not have a verified email address, the email is discarded.

What the Traveler Sees

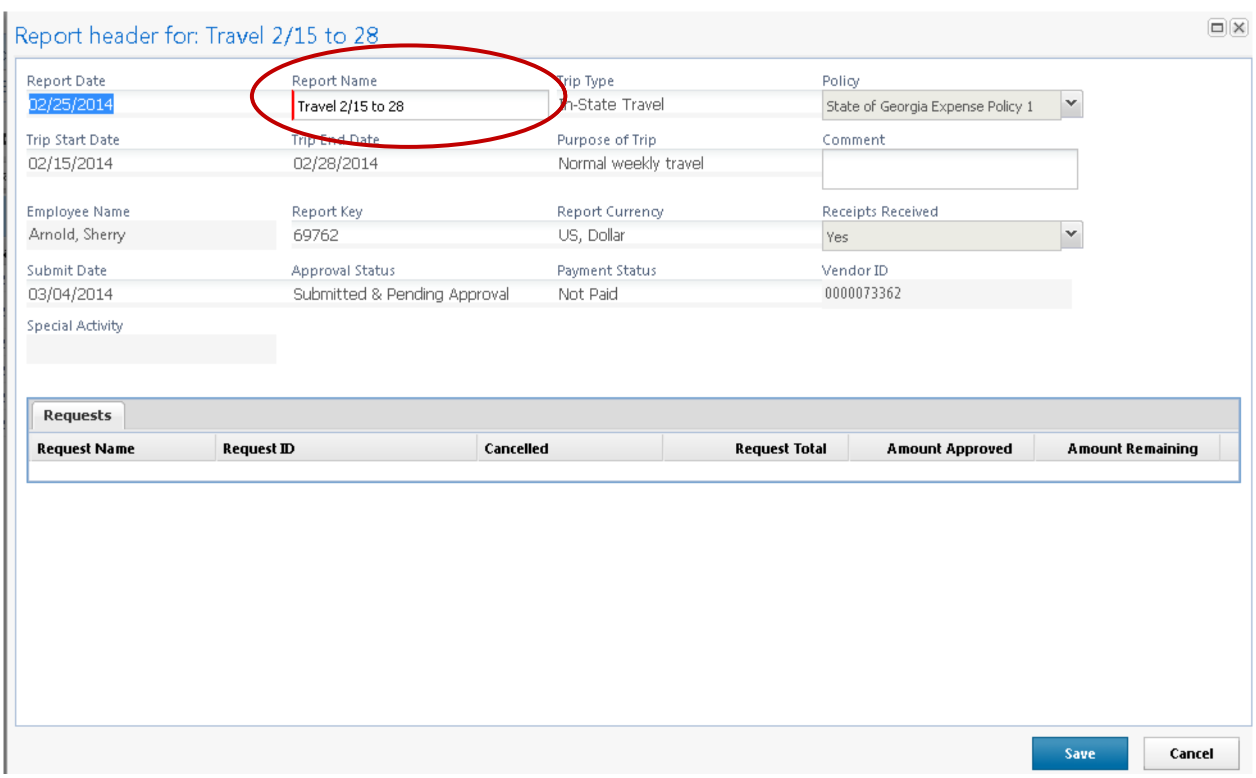
Once the image appears on the user's Receipt Store repository, the traveler can attach the image as usual.

Section 2: Report Name is Editable Post-Submit for Processors and Approvers

Overview

Prior to this release, the **Report Name** field of an expense report would become read-only once the report was submitted. In the December release, the **Report Name** field can now be edited by processors and approvers with *Modify* permissions to the field *after* the report has been submitted. This enhancement allows them to make changes to the **Report Name** field while they have the report in their queue. It does *not* allow them to make any other field changes post-Submit, or allow the processor/approver to make any changes to the report after approval.

The following screen shot is frm an Approver opening an Expense Report Header from an Expense Report in their Approval Queue. You can see the Report name field is NOT grayed out and can be changed.



Section 3: Profile – New Jump to List

Overview

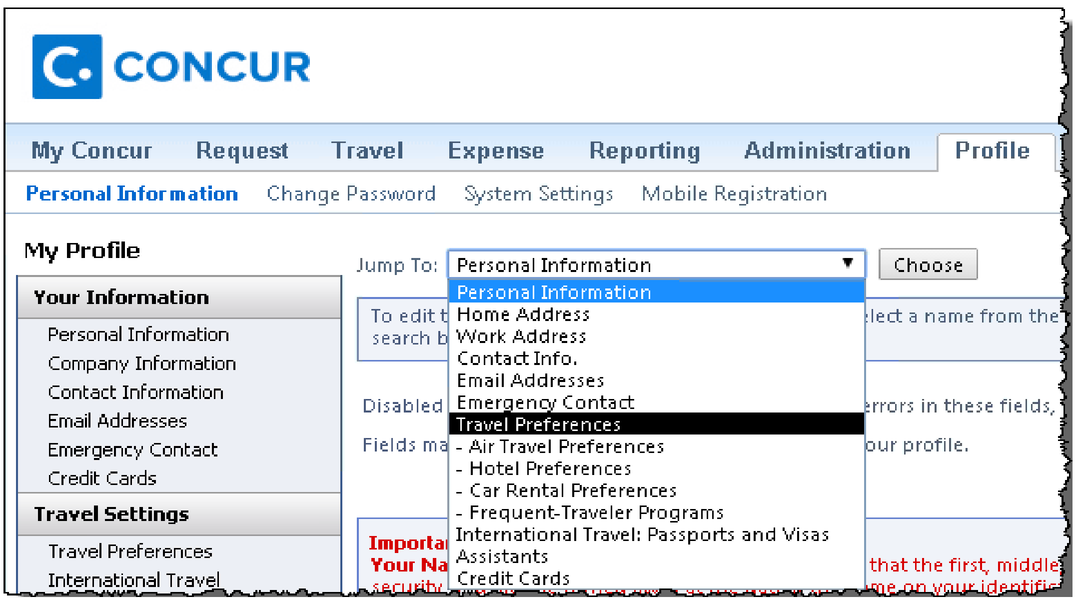
A new **Jump To** list has been added to the personal information page in Profile. The personal information page is long – it contains the user's name, address, contact info, travel preferences, credit card, etc. – and this new option makes it much easier and quicker for the user to navigate.

BENEFIT

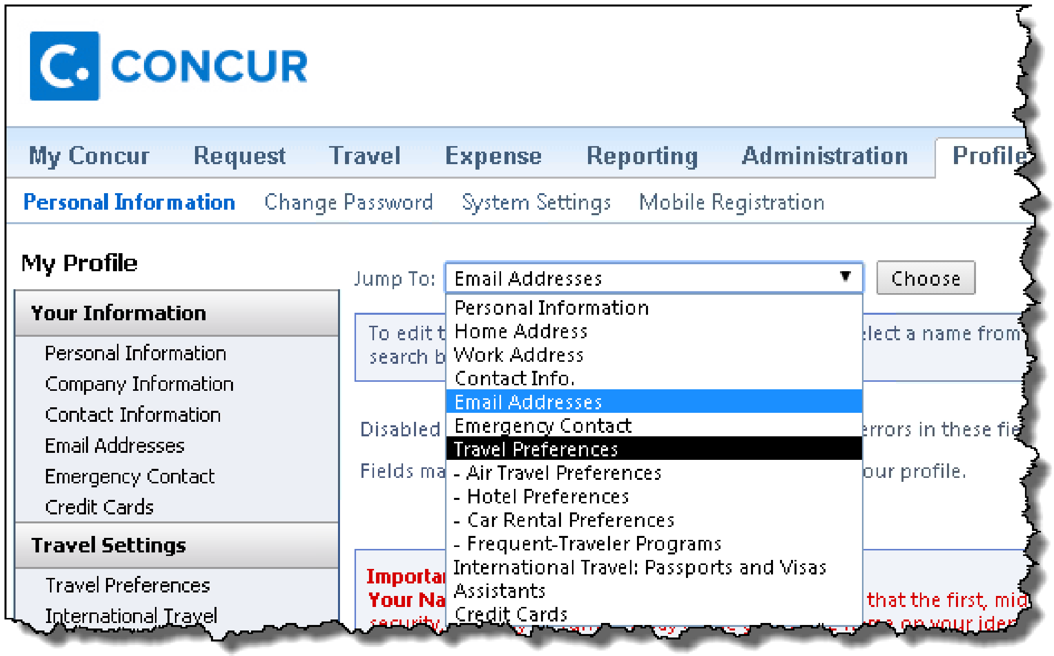
The new list assists the user in navigating a long page with many sections.

What the User Sees

When the user clicks **Profile** > **Personal Information**, the personal information page appears. The new **Jump To** list is at the top of the page.



The user clicks the list, clicks an option then clicks **Choose**.



.

The user is then quickly directed to the desired section of the page

Section 4: Expense Approver: View Report Approved as Delegate

Overview

Currently, when a delegate – working on behalf of an approver – approves a report and then later wants to view that report, the delegate has to again be working on behalf of that same approver. That is, the approved report appears in the *approver's* list of approved reports, but not in the *delegate's* list of approved reports.

With this release, the approved report appears in both places.

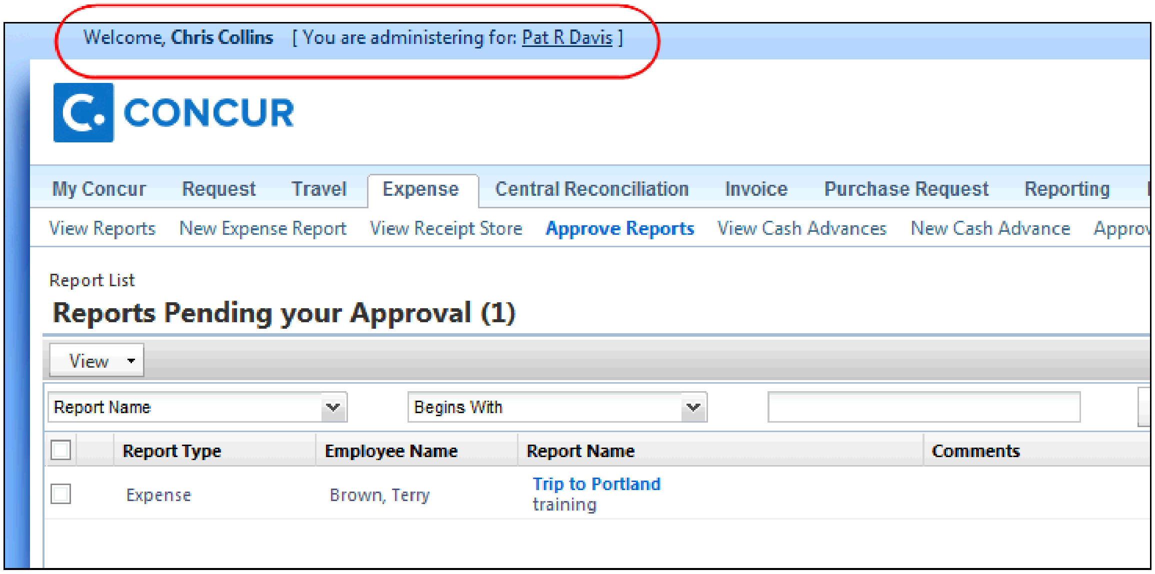
Based on a new site setting, the delegate approver can see all reports he/she approved – all in one place. When the delegate approver views the list of reports he/she approved – all approved reports appear, including those approved while working as a delegate.

BENEFIT

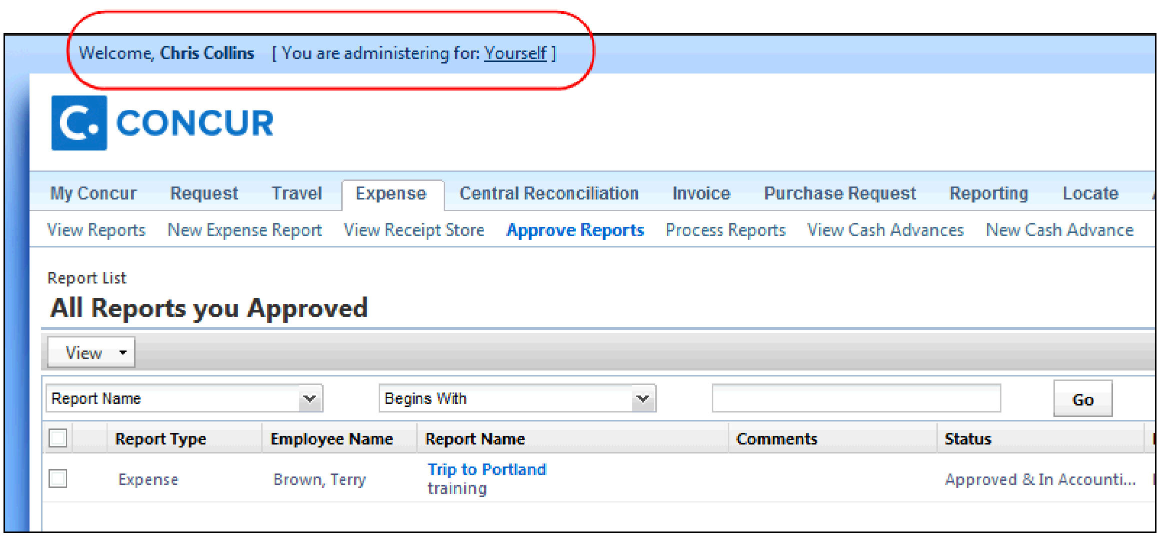
This feature provides easier access to approved reports for the delegate approver.

What the Delegate Approver Sees

In this example, Chris Collins is working as a delegate for Pat Davis. Chris approves the report from Terry Brown for a trip to Portland.



Later, Chris Collins – working as himself; not as a delegate – views the reports he has approved. Terry Brown's report appears in Chris's list of approved reports, even though he approved the report on behalf of Pat Davis.



Section 5: Expense: Message for Auto-Created Expense Entries

Overview

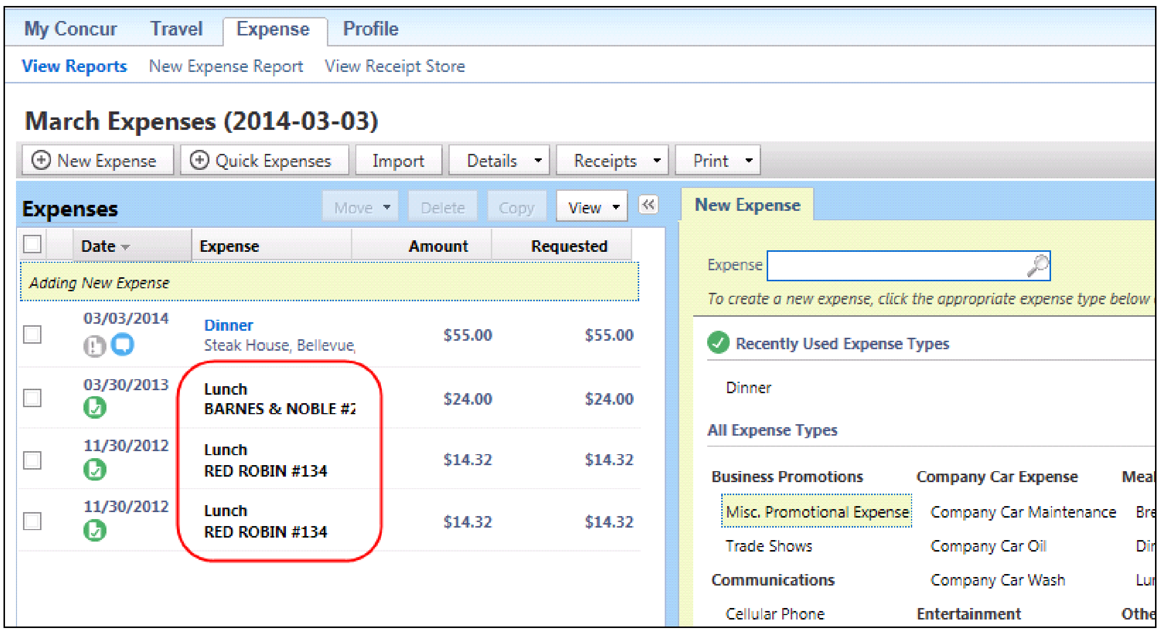
There are cases when expenses are created automatically by Concur. With this release, the auto-generated entries display in bold so the user knows which items to review.

BENEFIT

This feature provides the notification for the user to review auto-created expense entries for accuracy.

What the User Sees

The auto-created entries appear in bold. Best practice is for the user to open and review the entries.



Section 6: Cash Advance Admin: Send Back to Employee, New Buttons and Fields on Cash Advance Details Window

New Send Back to Employee Option

Overview

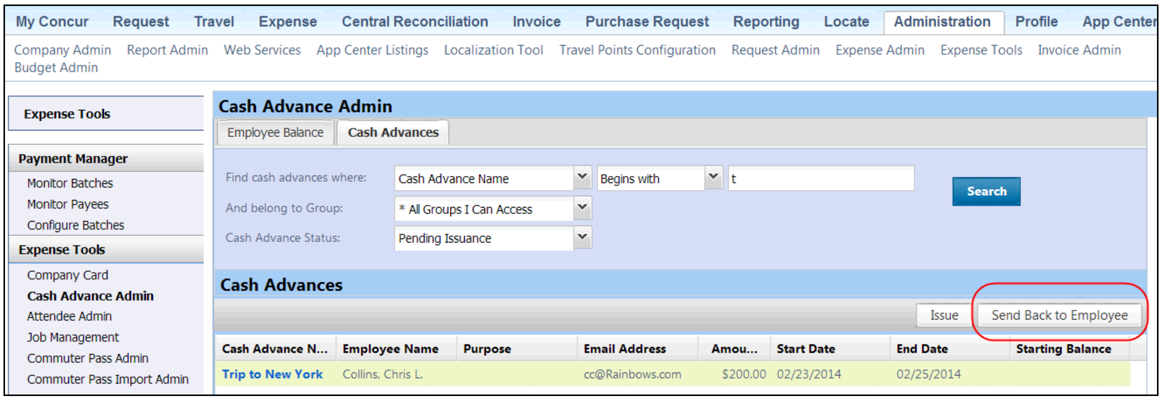
With this release, the **Do Not Issue** button has been replaced with the **Send Back to Employee** button so the admin can return the cash advance request to the user – for example, to change the amount or to provide more information.

BENEFIT

This feature allows the user to provide the requested information (for example) and submit again – instead of having to create another request.

What the Cash Advance Admin Sees

The new **Send Back to Employee** button appears on the **Employee Balance** tab, the **Cash Advances** tab, and the **Cash Advance Details** window.



New Buttons on the Cash Advance Details Window

Overview

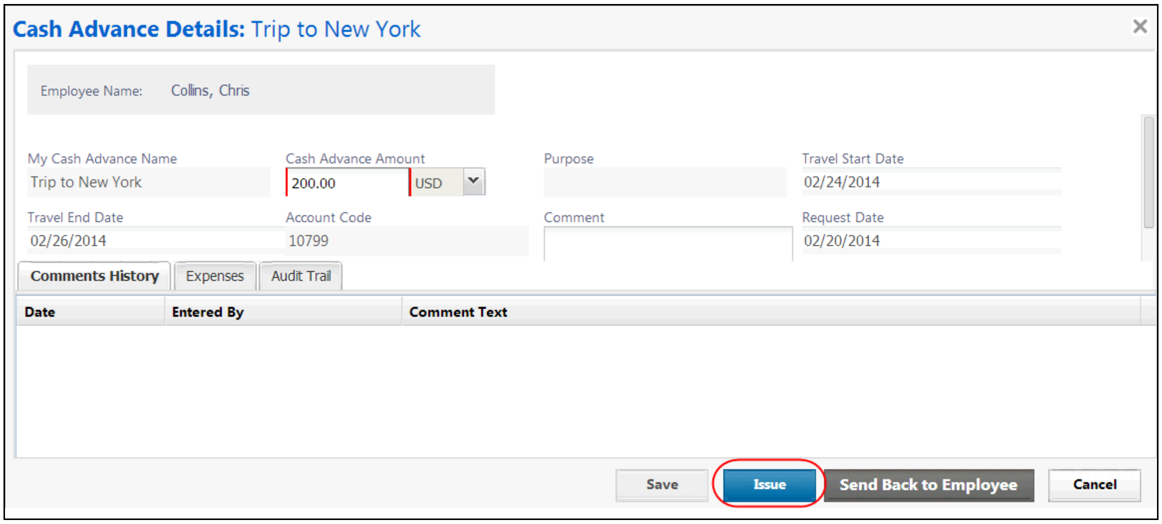
When the Cash Advance admin clicks a cash advance, the **Cash Advance Details** window appears. Currently, the **Issue** button does not appear in the **Cash Advance Details** window – the admin must return to the previous page in order to take action. With this release, the **Issue** button appears on the **Cash Advance Details** window, along with the new **Send Back to Employee** button.

BENEFIT

Without having to return to the previous page to take action, the Cash Advance admin's processing steps are streamlined.

What the Cash Advance Admin Sees

The **Issue** button appears in the **Cash Advance Details** window.



New Fields for Cash Advance Admin

Overview

Recently, new cash advance fields were exposed and added by default to the cash advance request form. With this release, those fields will be available on the Cash Advance admin issuance form as well.

BENEFIT

Without having to return to the previous page to edit a field, the Cash Advance admin's processing steps are streamlined.