Travel & Expense Module Upgrade Changes
March 2015
Travel & Expense Changes

• Cleaner and faster interface
• All data entry on one page
• New Quick-Fill function makes data entry quick and easy
• Process is the same; look and feel is different
The **Business Purpose**, **Report Description** and **Destination Location** all function in the same way as in the old version.
New Quick-Fill Feature

• Allows you to enter the same expense type for multiple days
Data Entry on One Page

• All expense report details are on one page. No need to navigate to an additional detail page.
Odometer Readings

• Odometer Readings are no longer required
• Enter Miles Traveled and Commute/Personal Mile deduction
Description Field

- Description Field on each expense line can be expanded to enter a large text area
New Expense Type

• The expense types of Taxi, Public Transportation, Tolls & Train have all been combined into one expense type: Commercial Transportation
Accounting Details

- The **Accounting Details** (chartstring) information can be viewed for each line by clicking on the expand button.
Meals

- **First/Last Day Link** transfers you to a deduction page. Must click the **Deduction Flag checkbox** to reduce the per diem amount by 25%.
Expand or Collapse Rows

- Can **Expand** or **Collapse** Rows to see the detail of all rows or to collapse rows to one line.

<table>
<thead>
<tr>
<th>Date</th>
<th>Expense Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Expand All | Collapse All

Add: | 🎁 My Wallet (0) | 🚩 Quick-Fill

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Adding Additional Blank Rows

- Must add blank rows by clicking on the plus sign. Blank rows will no longer populate automatically.
The **Actions** drop down can be used for setting the default chartstring for the report, copying an expense line or applying a cash advance. Click the **Go** button after selecting the appropriate action.
Save for Later

• Click **Save for Later** to save the report and return at a later time for submission.
Summary and Submit

• Once the report is ready for submission, click the **Summary and Submit** link.
Final Summary and Submit Page

• On the final Summary Page, you can:
  • Go back to the Expense Details page to make changes
  • Print a copy of your expense report with the View Printable Version link
  • Add any Notes or justifications
Final Submission Step

• The final step of the submission process is to click the certification statement and click the Submit Expense Report button. Be sure to click OK to confirm your submission.
Withdraw Expense Report

• After submission, the traveler will have a short amount of time to immediately withdraw the Expense Report. If the withdrawal option is not available to the traveler, the approver can still send it back to the traveler for correction.
Workflow

• The workflow of the expense report can be viewed in the Approval History life-cycle. The icon that is lit, is the current state of the report. The Action history will be displayed below the Approver History.
Workflow View for Multiple Approvers

• If multiple approvers are identified for approving (i.e. an expense report is split-funded), the traveler will not see each individual approver name but will see an indication of Multiple Approvers.
Approvals

• Nothing will change regarding how an individual approver approves an expense report
  ➢ Click on Worklist link
  ➢ Click on report/sheet ID link to open the expense report
  ➢ Review and Approve (pending valid budget check)
    o Send Back, Hold and Deny are also still options
Approvals
Activity

• Log into the training database with your USER ID and the special password
• Complete the Activity