

TEM Support Announcement

Date: March 5, 2015

Topic: What's Changed in TEM 8.7

On the March 28-29th weekend, TEM will be unavailable while it is upgraded to version 8.7. Here are the changes and improvements you will see in this upgrade ~




Funding Default allows both Fast Index and Activity code

Previously, if you were in the General Information page, and tried to enter a Funding Default with both a Fast Index code and an Activity code, you received the error "Account Code is required". This defect has been corrected, so this screen will now allow you to enter both codes:

Chart	Index	Fund	Organization	Program	Activity	Location	Project	Percent
1	FOFSY	10200	5336	082SYS	BIFMPR			100.00

Reimbursable and Non-Reimbursable expenses on the same page

Reimbursable and non-reimbursable expenses used to appear on separate tabs on the Expenses page. Now they will appear together on one page. Symbols identify the expense type: a "person" symbol appears next to *reimbursable* expenses, a "building" symbol next to *non-reimbursables*:

Expense type	Description	Symbol
Reimbursable	Paid by Traveler	
Non-reimbursable	Paid by Western	
Non-reimbursable	Paid by Other	


You'll first see these symbols on the Per Diem Expenses page, where you'll select a default payment method:








Date	Location	Exp	from per diem
Mar 17, 2015	Seattle, WA	In-State Lodging - Per	
Mar 18, 2015	Seattle, WA	In-State Lodging - Per	
Mar 19, 2015	Seattle, WA	In-State Lodging - Per	

After you've selected a Per Diem default payment method, the symbol appears next to that expense:

Per Diem Expenses (TA005738 - In Process)

Sharon Colman (ID: W00204637)

Select a default Payment Method: * Paid by Traveler 

Date	Location	Expense Type	Uncheck to exclude from per diem	Paid By
Mar 17, 2015	Seattle, WA	In-State Lodging - Per		Paid by Traveler 
Mar 18, 2015	Seattle, WA	In-State Lodging - Per		Paid by Traveler 
Mar 19, 2015	Seattle, WA	In-State Lodging - Per		Paid by Traveler 
Mar 17, 2015	Seattle, WA	In-State Meals - Per D <input checked="" type="checkbox"/> Breakfast <input checked="" type="checkbox"/> Lunch <input checked="" type="checkbox"/> Dinner		Paid by Traveler 
Mar 18, 2015	Seattle, WA	In-State Meals - Per D <input checked="" type="checkbox"/> Breakfast <input checked="" type="checkbox"/> Lunch <input checked="" type="checkbox"/> Dinner		Paid by Traveler 
Mar 19, 2015	Seattle, WA	In-State Meals - Per D <input checked="" type="checkbox"/> Breakfast <input checked="" type="checkbox"/> Lunch <input checked="" type="checkbox"/> Dinner		Paid by Traveler 
Mar 20, 2015	Seattle, WA	In-State Meals - Per D <input checked="" type="checkbox"/> Breakfast <input checked="" type="checkbox"/> Lunch <input checked="" type="checkbox"/> Dinner		Paid by Traveler 

On the Expenses page, the symbol appears to the left of each expense, and in the summary panel on the right:

Authorization Report Actions: New Refresh Open Save Copy Delete More Actions Close

Seattle WA 3/17/15 (TA005738 - In Process)

Add Expenses

Date: * Mar 17, 2015 Type: * Select Receipt Amount: * 0 USD


Paid By: * Select Provider: Location: Description: Funding

<input type="checkbox"/>	Date	Type	Description	Pay in USD
<input type="checkbox"/>	Mar 17, 2015	In-State Lodging - Per Diem		156.00
<input type="checkbox"/>	Mar 17, 2015	In-State Meals - Per Diem		71.00
<input type="checkbox"/>	Mar 18, 2015	In-State Lodging - Per Diem		156.00
<input type="checkbox"/>	Mar 18, 2015	In-State Meals - Per Diem		71.00
<input type="checkbox"/>	Mar 19, 2015	In-State Lodging - Per Diem		156.00
<input type="checkbox"/>	Mar 19, 2015	In-State Meals - Per Diem		71.00
<input type="checkbox"/>	Mar 20, 2015	In-State Meals - Per Diem		71.00

Traveler
Sharon Colman (ID: W00204637)

Summary By Type

Total: 752.00 USD

Reimbursable 

Total: 752.00 USD

In-State Me... 284.00
In-State Lo... 468.00

You can select an expense and change it to the other type, and the symbols will change accordingly. In this example, two expense items have been changed to non-reimbursables:

Authorization Report Actions: New Refresh Open Save Copy Delete More Actions Close

Seattle WA 3/17/15 (TA005738 - In Process)

Add Expenses

Date: * Mar 20, 2015 Type: * Select Receipt Amount: * 0 USD


Paid By: * Select Provider: Location: Description: Funding

<input type="checkbox"/>	Date	Type	Description	Pay in USD
<input type="checkbox"/>	Mar 17, 2015	In-State Lodging - Per Diem		156.00
<input type="checkbox"/>	Mar 17, 2015	In-State Meals - Per Diem		71.00
<input type="checkbox"/>	Mar 18, 2015	In-State Lodging - Per Diem		156.00
<input type="checkbox"/>	Mar 18, 2015	In-State Meals - Per Diem		71.00
<input checked="" type="checkbox"/>	Mar 19, 2015	In-State Meals - Per Diem		71.00
<input type="checkbox"/>	Mar 19, 2015	In-State Lodging - Per Diem		156.00
<input checked="" type="checkbox"/>	Mar 20, 2015	In-State Meals - Per Diem		71.00

Traveler
Sharon Colman (ID: W00204637)


Summary By Type

Total: 752.00 USD

Reimbursable 

Total: 610.00 USD

In-State Me... 142.00
In-State Lo... 468.00

Non-Reimbursable 

Total: 142.00 USD

In-State Me... 142.00

Can change several expense items to a different Funding simultaneously

Previously, if you wanted to change several expenses to a different funding, you had to change them one at a time. Now you can tick to select the items you want to change, select “More Actions”, “Change Expense Funding”, and then change them all in a single action to the other funding string(s). In this example, we’ve ticked two items to change to a different funding:

The screenshot shows the 'Authorization Report Actions' menu. The 'More Actions' dropdown is open, and 'Change Expense Funding' is highlighted. Below the menu, the 'Add Expenses' form is visible, showing a list of expenses with checkboxes for selection. Two items are checked: 'Mar 17, 2015 In-State Meals - Per Diem' and 'Mar 18, 2015 In-State Meals - Per Diem'.

Date	Type	Description	Pay in USD
<input type="checkbox"/>	Mar 17, 2015	In-State Lodging - Per Diem	156.00
<input checked="" type="checkbox"/>	Mar 17, 2015	In-State Meals - Per Diem	71.00
<input type="checkbox"/>	Mar 18, 2015	In-State Lodging - Per Diem	156.00
<input checked="" type="checkbox"/>	Mar 18, 2015	In-State Meals - Per Diem	71.00
<input type="checkbox"/>	Mar 19, 2015	In-State Meals - Per Diem	71.00
<input type="checkbox"/>	Mar 19, 2015	In-State Lodging - Per Diem	156.00
<input type="checkbox"/>	Mar 20, 2015	In-State Meals - Per Diem	71.00

Funding can be attached to Non-Reimbursable expenses

Previously, funding strings could only be attached to reimbursable expense items. Now, you can enter funding string(s) for non-reimbursable expenses as well. The funding can be seen in the TEM Detail Report:

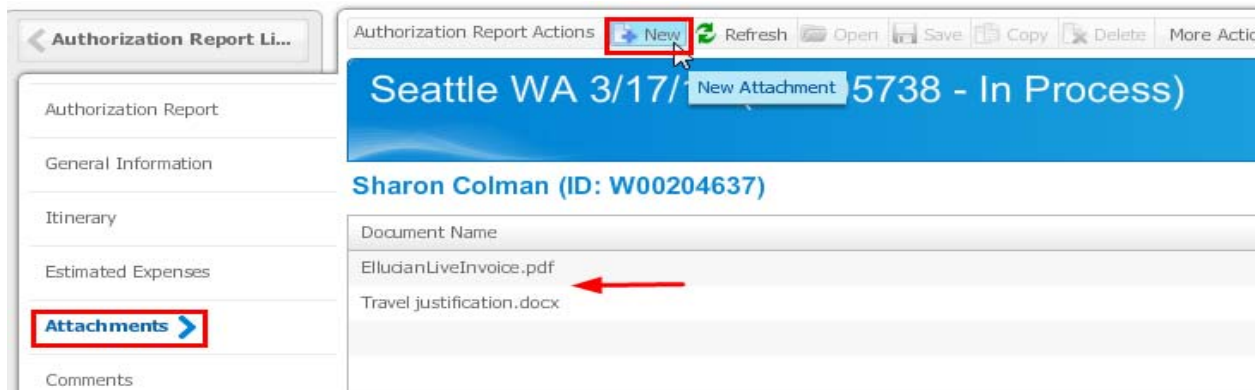
Non-Reimbursable Expenses										
Date	Expense Type							USD Amount		
Mar 19, 2015	In-State Meals - Per Diem**							71.00		
Paid By: Paid by Other		Provider:								
Description:		Location: Seattle								
Funding										
Chart	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	Amount USD	
1	FOFSY	10200	5336	E351	082SYS	BIFMPR	←		71.00	
Mar 20, 2015	In-State Airfare**							285.00		
Paid By: Paid by Western		Provider:								
Description:		Location:								
Funding										
Chart	Index	Fund	Orgn	Acct	Prog	Actv	Locn	Proj	Amount USD	
1	FOFSY	10200	5336	E352	082SYS	BIFMPR	←		285.00	

Defect corrected: penny moves on split-funding

Previously, if an expense item was split-funded, TEM would sometimes move 0.01 from one funding string to another after the item was saved, due to a rounding defect. This defect has been corrected – pennies will no longer jump from one funding string to another.

Attachments can now be added via TEM “Attachments”

Previously, you’ve had to exit to Nolij to attach documents. TEM is now integrated to Nolij, so you can stay in TEM and attach documents by selecting “Attachments”, “New”. After you’ve attached a document, you can double-click on the file name to open/view it. (Note: If you wish, you can still add attachments using Nolij. It doesn’t matter how you add the attachment, it will be visible in both TEM and Nolij):



When you click on “New”, a dialog box allows you to browse to where your attachments are stored:



Warning message if reimbursement exceeds TA amount

If an expense item estimate is changed to a larger amount on the reimbursement, the message “Exceeds Authorized Amount” will appear. This is just an “FYI” to the delegate/traveler, and does not stop the TR from being processed. Approvers will see a similar message when reviewing transactions:

