zeno

Zeno Expense

Mapped Mileage Admin User Guide

zeno

Document History

Version	Description	Author	Date
V1.10	Document Creation	Alison Turner	01/10/2019
V2.0	Updated template and content	Expense Support Team	05/04/2020
V2.1	Updated Branding	Expense Support Team	03/08/2020

zeno

Table of Contents

Introduction

This document introduces Zeno Expense's Mapped Mileage functionality. Mapped Mileage adds GPS tracking and map support to Zeno Expense in order to offer new methods for capturing and displaying mileage claim information.

Features

- Claimants can use GPS tracking in the mobile app to record a journey's path and distance. Final route is displayed on a map.
- Claimants can enter origin/destination locations in the mobile app or website and Zeno Expense will calculate the shortest journey distance between the points and display the route on a map.
- A default unclaimable distance can be configured in user profiles if required. The value configured will be deducted from the distance of any claims. The default amount may be overwritten by claimants on a per claim basis. The default label of this value is "offset" but it can be customised if desired.
- Policy breaches will be generated whenever a claimant overrides the calculated distance or the default offset value.
- Default GL/dropdown options can be set on a per allowance type basis. These take precedence over the claimant default GL/dropdown option for each one that is specified. Default options are automatically applied to claims, even when the allowance type is marked as not requiring GL coding.

Notes

- Unlike other cash expenses created using the mobile app, mapped mileage expenses are stored as completed expenses, therefore, they will always appear on the right-hand side of the website.
- The journey path and recorded distance of GPS tracked mileage cannot be modified by the claimant. However, in the event that the names of the start/end locations derived from GPS coordinates are not appropriate, it's possible for claimants to update the start and end location names to any location within 500m of the recorded start or end location of the trip.
- Pre-existing mileage allowance types can be upgraded in Zeno Expense to add support for map options.
- Mileage allowance types can be configured to support either unmapped distance entry only (the claimant enters a distance amount), mapped mileage entry only, or both.
  Note: Unmapped distance entry is only supported in the website.
- The mobile app does not support entering GL/dropdown or custom free-text claim form information. However, default GL/dropdown options can be specified for each allowance type.

Setup

Admin users can enable claimants to use the 'Mapped Mileage' functionality on Zeno's desktop or mobile app from the 'Allowance Manager' option in the Admin tab.

Allowance Manager

If you don't already have "Mileage" set up as an existing Allowance, you will need to create a mileage allowance first:

- Choose 'Allowance Manager' from the 'Data Tools' menu in the Admin Tab
- Click the ADD NEW button
- Select the type of allowance you wish to create
- Select the region (if relevant) where the allowance can be used
- Complete the data fields as required
- SAVE your work

If you already have mileage set up as an Allowance, you can edit the existing allowance to add mapped mileage as follows:

- Choose 'Allowance Manager' from the 'Data Tools' menu in the Admin tab
- Open the Allowance that mapped mileage should be added to
- Go to 'Supported Input methods' and ensure both checkboxes are ticked.
- Select the required behaviour of mapped mileage from the available "Options"

zeno

Description of options:

Options	Description
Description Required?	Checking this box will require end-users to enter a value in the description field
GL Coding required?	Checking this box will require users to enter GL coding details for this allowance
Offset (supported)	Checking this box will require end-users to enter a value in the description field. It will also ensure that the offset amount (as per value added in the user profile) is applied to the allowance claim
User Full units?	Checking this box allows the system to round the distance travelled up or down to the nearest mile/km
Rates amendable?	Checking this box allows users to amend the per unit rate (not recommended)
GST required?	Check this box if you require GST to be applicable to this allowance

Adding Offset distance to User Profiles (if required):

Enter the offset distance amount here.

Desktop Application

Activating mapped mileage enables end-users to enter 'Origin' and 'Destination' locations to calculate distance travelled using GPS maps:

Approving/Rejecting Mapped Mileage claims:

Mobile App

If Mapped Mileage is enabled, the new Zeno Mobile landing page (for expense) will look like this:

Select the (+) button to start using the functions within the app:
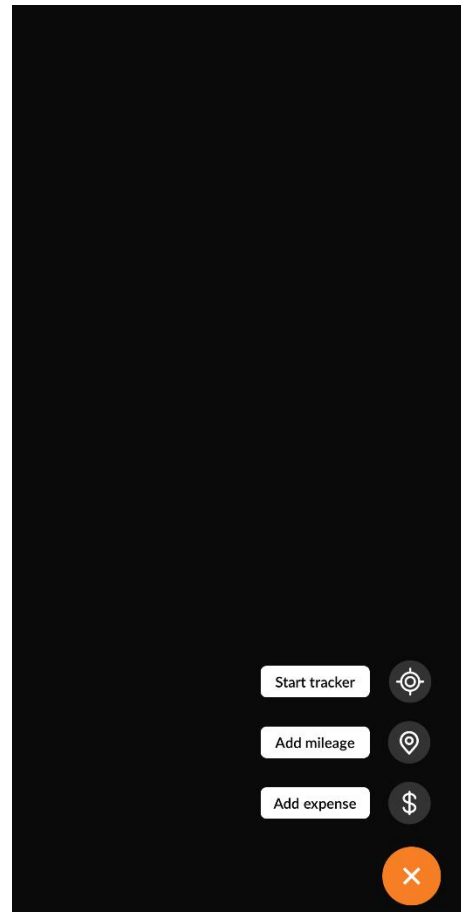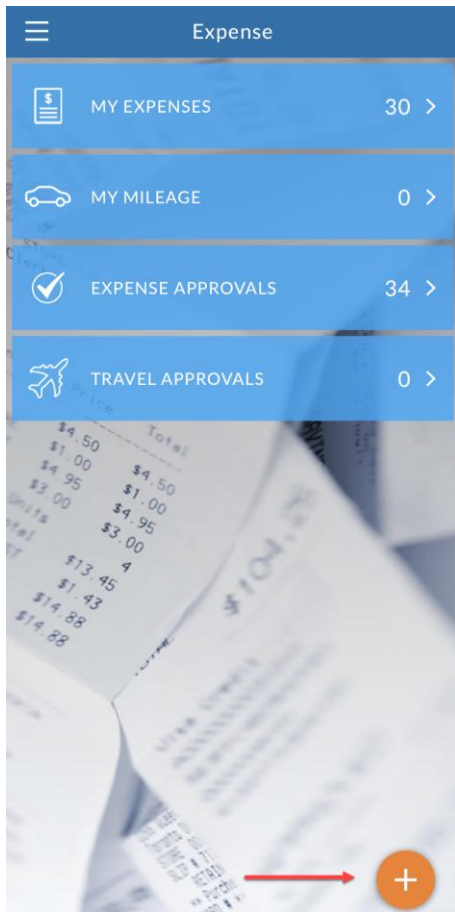
- Start tracker - choose this option to record a trip in real time
- Add mileage - choose this option to enter start and finish locations to calculate the distance travelled
- Add expense (existing functionality)

To use the tracking functionality, end users will need to have location services switched on.

zeno

Example of the screen display in the mobile app when a user has opted to 'Start tracker':
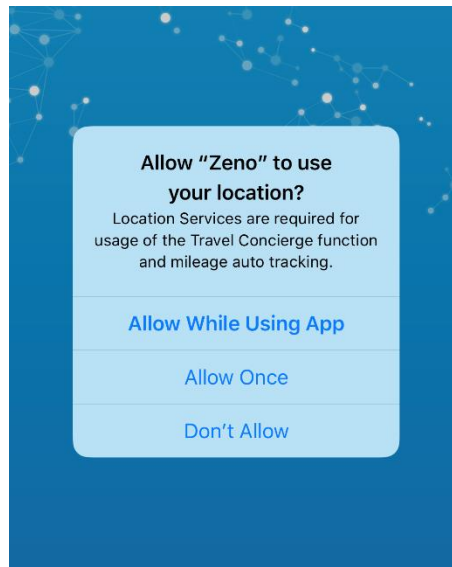
End-users can select the 'Start tracker' option on the mobile app to record a trip in real-time. The stop button must be tapped at the end of the trip to calculate the distance travelled. Claimants must complete additional fields as required. They can save the expense or submit for approval directly from the app.
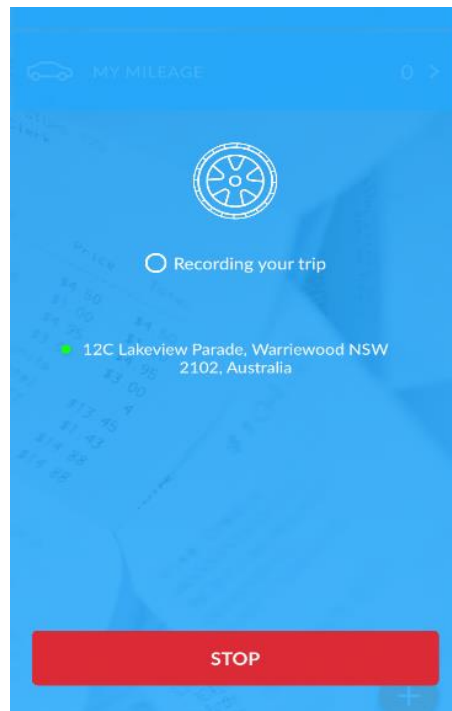
Example of the 'Add mileage' screen in the mobile app:

Users can enter the 'Start' and 'End' locations to calculate the distance travelled. Additional fields must be completed as required before the claimant can save or submit the expense directly from the app.