

## Demonstration #4a: Adjustment to a Travel Authorization

Objectives: • Adjust a Travel Authorization

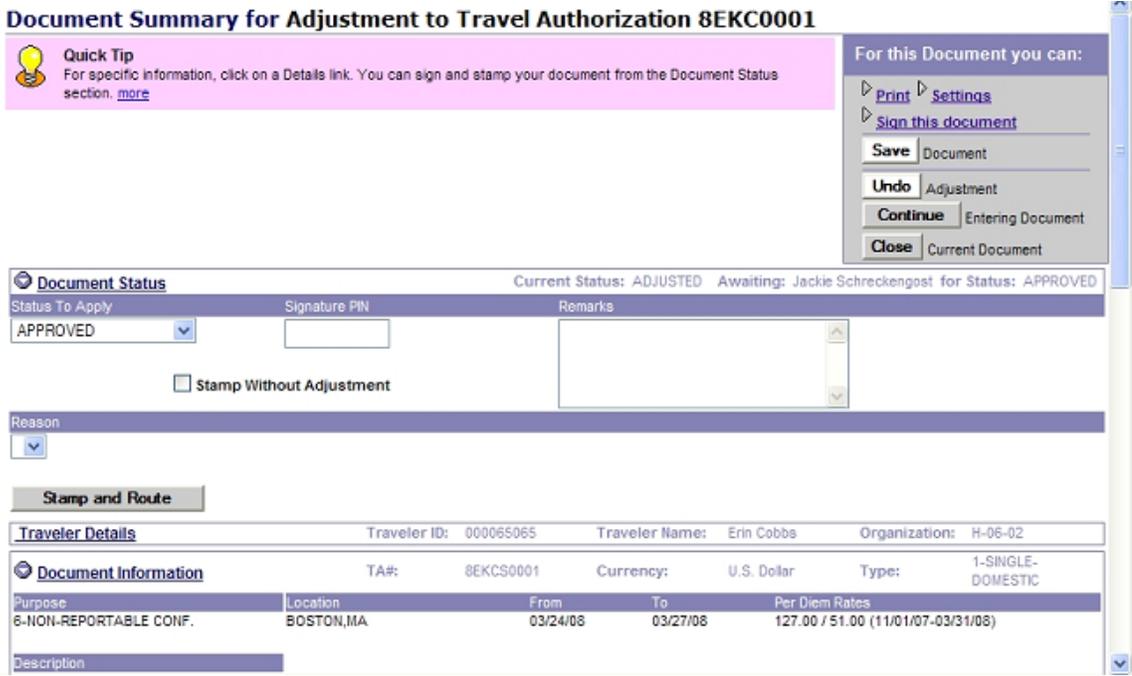
Notes: *This demonstration will be going over how to adjust an authorization.*  
*Adjustments are used on authorization before the authorization has been stamped DATA LINK.*

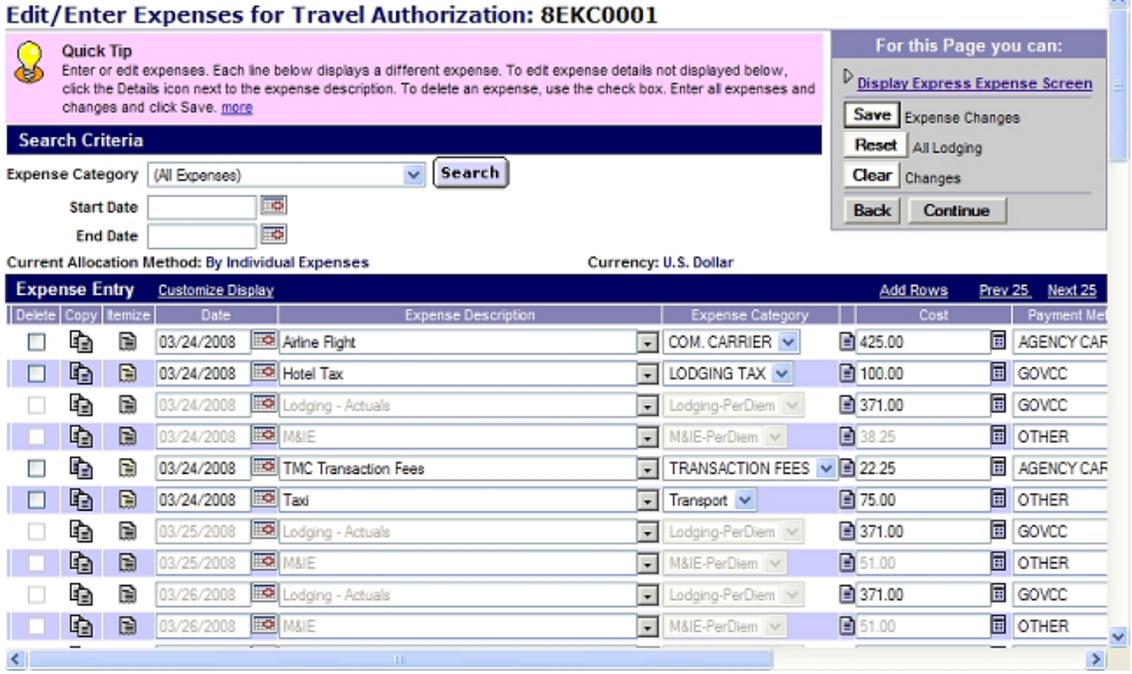
Instructions: Execute the following steps:

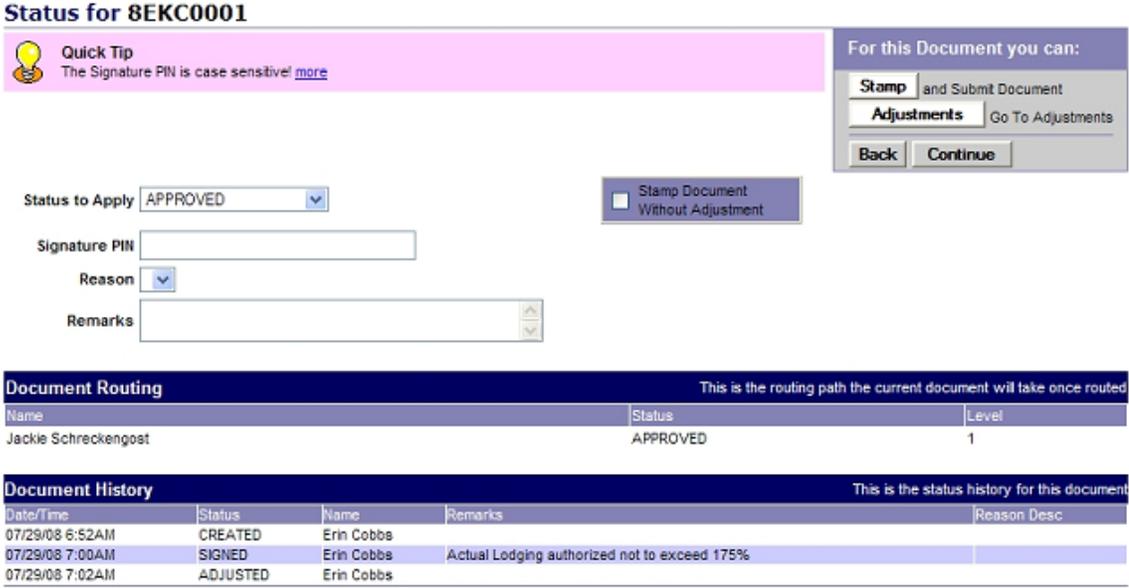
After you signed your authorization you realize that you forgot to add a shuttle fee for \$30. The authorization will need to be adjusted, because it was signed but not datalinked.

Step	Action																																																							
1	<p>From the <b>Home</b> page:</p> <p>➤ Click <b>Open/Copy Document</b> from the <b>Document Toolbar</b></p>																																																							
2	<p>The <b>Traveler Listing/Document Search (Open/Copy Document)</b> will appear.</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p><b>Traveler Listing (Open/Copy Document)</b></p> <p><b>Quick Tip</b>   Type one or more letters of the traveler's last name and click Search. Then, click the traveler's name to list all documents.  <a href="#">Open/CopyDoc</a> <a href="#">DeleteDoc</a> <a href="#">AmendDoc</a></p> <p><b>Enter Search Criteria</b></p> <p>Name (Last,First) <input type="text"/> <input type="button" value="Search"/></p> <p>Document Type <input type="text" value="ALL"/></p> <p><b>Traveler List</b> <span>Click on an entry to select it</span></p> <table border="1"> <thead> <tr> <th>Name</th> <th>VNum</th> </tr> </thead> <tbody> <tr><td><a href="#">Barth, Brenda</a></td><td>0000-13422</td></tr> <tr><td><a href="#">Cobbs, Erin</a></td><td>0000-65065</td></tr> <tr><td><a href="#">Curtis, Cynthia</a></td><td>0000-00006</td></tr> <tr><td><a href="#">Germantown, Bill</a></td><td>9900-00021</td></tr> <tr><td><a href="#">Germantown, Brenda</a></td><td>9900-00010</td></tr> <tr><td><a href="#">Germantown, Erin</a></td><td>9900-00008</td></tr> <tr><td><a href="#">Germantown, Joan</a></td><td>9900-00006</td></tr> <tr><td><a href="#">Germantown, Louis</a></td><td>9900-00025</td></tr> <tr><td><a href="#">Help Desk, CBS</a></td><td>9000-00099</td></tr> </tbody> </table> </div> <div style="width: 48%;"> <p><b>Document Search (Open/Copy Document)</b></p> <p><b>Document List</b> <span>Click on an entry to select it</span></p> <p>Traveler: Erin Cobbs</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Document Name</th> <th>Dep Date</th> <th>Status</th> <th>In Use</th> </tr> </thead> <tbody> <tr><td> TA</td><td>8EKCS0008-1</td><td>09/22/08</td><td>CANCELLED</td><td></td></tr> <tr><td> TA</td><td>8EKCS0009</td><td>09/16/08</td><td>COMPLETED</td><td></td></tr> <tr><td> TA</td><td>8EKRS0009</td><td>07/21/08</td><td>COMPLETED</td><td></td></tr> <tr><td> TA</td><td>8EKRS0009-1</td><td>07/21/08</td><td>SIGNED</td><td></td></tr> <tr><td> TA</td><td>20080725a</td><td>06/01/08</td><td>ADJUSTED</td><td></td></tr> <tr><td> TA</td><td>8EKC0001</td><td>03/24/08</td><td>SIGNED</td><td></td></tr> </tbody> </table> </div> </div> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>✓ For individual users (travelers), only their name will show on the Traveler's List.</li> <li>✓ For Training purposes, documents with any status except COMPLETED are the ones to choose from.</li> </ul>	Name	VNum	<a href="#">Barth, Brenda</a>	0000-13422	<a href="#">Cobbs, Erin</a>	0000-65065	<a href="#">Curtis, Cynthia</a>	0000-00006	<a href="#">Germantown, Bill</a>	9900-00021	<a href="#">Germantown, Brenda</a>	9900-00010	<a href="#">Germantown, Erin</a>	9900-00008	<a href="#">Germantown, Joan</a>	9900-00006	<a href="#">Germantown, Louis</a>	9900-00025	<a href="#">Help Desk, CBS</a>	9000-00099	Type	Document Name	Dep Date	Status	In Use	 TA	8EKCS0008-1	09/22/08	CANCELLED		 TA	8EKCS0009	09/16/08	COMPLETED		 TA	8EKRS0009	07/21/08	COMPLETED		 TA	8EKRS0009-1	07/21/08	SIGNED		 TA	20080725a	06/01/08	ADJUSTED		 TA	8EKC0001	03/24/08	SIGNED	
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2a	<ul style="list-style-type: none"> <li>➤ Click on the <i>Name</i> to bring up their documents</li> <li>➤ Click the <b>Open</b>  icon of the document you wish to adjust</li> </ul>																								
2b	<p>If there are more than one amendment/adjustment made on the travel document the <i>Open Document Version</i> page will appear.</p> <div data-bbox="293 493 1414 724" style="border: 1px solid black; padding: 5px;"> <p><b>Open Document Version for 8EKRS0009-1</b></p> <div style="background-color: #fce4ec; padding: 5px; border: 1px solid #ccc;"> <p> <b>Quick Tip</b> Adjustments have been made to this document. Note that only the current version, marked by **, may be further adjusted or routed. <a href="#">more</a></p> </div> <div style="float: right; background-color: #9e9e9e; color: white; padding: 5px; border: 1px solid #ccc;"> <p>For this Document you can:</p> <p><b>Cancel</b> Opening Document</p> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr style="background-color: #9e9e9e; color: white;"> <th colspan="5">Document Version List</th> <th style="text-align: right;">Click on an entry to select it</th> </tr> <tr style="background-color: #9e9e9e; color: white;"> <th>Document Type</th> <th>Level</th> <th>Date</th> <th>Time</th> <th>Adjustor</th> <th></th> </tr> </thead> <tbody> <tr style="background-color: #e0e0e0;"> <td> AMENDMENT **</td> <td>2</td> <td>07/28/08</td> <td>3:31PM</td> <td>Erin Cobbs</td> <td></td> </tr> <tr style="background-color: #e0e0e0;"> <td> ORIGINAL</td> <td>1</td> <td>07/28/08</td> <td>3:19PM</td> <td>Erin Cobbs</td> <td></td> </tr> </tbody> </table> </div>	Document Version List					Click on an entry to select it	Document Type	Level	Date	Time	Adjustor		 AMENDMENT **	2	07/28/08	3:31PM	Erin Cobbs		 ORIGINAL	1	07/28/08	3:19PM	Erin Cobbs	
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3	<p>The <i>Document Summary</i> page appears.</p> 

4	<p>Click on <b>Expenses</b> in the <i>Document Toolbar</i> to bring up the <i>Edit/Enter Expenses</i> page</p>  <p><b>Edit/Enter Expenses for Travel Authorization: 8EKC0001</b></p> <p><b>Search Criteria</b></p> <p>Expense Category: (All Expenses) <input type="button" value="Search"/></p> <p>Start Date: <input type="text"/> <input type="button" value="Calendar"/></p> <p>End Date: <input type="text"/> <input type="button" value="Calendar"/></p> <p>Current Allocation Method: By Individual Expenses      Currency: U.S. Dollar</p> <table border="1"> <thead> <tr> <th>Delete</th> <th>Copy</th> <th>Itemize</th> <th>Date</th> <th>Expense Description</th> <th>Expense Category</th> <th>Cost</th> <th>Payment Method</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><input type="button" value="Copy"/></td> <td><input type="button" value="Itemize"/></td> <td>03/24/2008</td> <td>Airline Flight</td> <td>COM. CARRIER</td> <td>425.00</td> <td>AGENCY CAR</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="button" value="Copy"/></td> <td><input type="button" value="Itemize"/></td> <td>03/24/2008</td> <td>Hotel Tax</td> <td>LODGING TAX</td> <td>100.00</td> <td>GOVCC</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="button" value="Copy"/></td> <td><input type="button" value="Itemize"/></td> <td>03/24/2008</td> <td>Lodging - Actuals</td> <td>Lodging-PerDiem</td> <td>371.00</td> <td>GOVCC</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="button" value="Copy"/></td> <td><input type="button" value="Itemize"/></td> <td>03/24/2008</td> <td>M&amp;E</td> <td>M&amp;E-PerDiem</td> <td>38.25</td> <td>OTHER</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="button" value="Copy"/></td> <td><input type="button" value="Itemize"/></td> <td>03/24/2008</td> <td>TMC Transaction Fees</td> <td>TRANSACTION FEES</td> <td>22.25</td> <td>AGENCY CAR</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="button" value="Copy"/></td> <td><input type="button" value="Itemize"/></td> <td>03/24/2008</td> <td>Taxi</td> <td>Transport</td> <td>75.00</td> <td>OTHER</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="button" value="Copy"/></td> <td><input type="button" value="Itemize"/></td> <td>03/25/2008</td> <td>Lodging - Actuals</td> <td>Lodging-PerDiem</td> <td>371.00</td> <td>GOVCC</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="button" value="Copy"/></td> <td><input type="button" value="Itemize"/></td> <td>03/25/2008</td> <td>M&amp;E</td> <td>M&amp;E-PerDiem</td> <td>51.00</td> <td>OTHER</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="button" value="Copy"/></td> <td><input type="button" value="Itemize"/></td> <td>03/26/2008</td> <td>Lodging - Actuals</td> <td>Lodging-PerDiem</td> <td>371.00</td> <td>GOVCC</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="button" value="Copy"/></td> <td><input type="button" value="Itemize"/></td> <td>03/26/2008</td> <td>M&amp;E</td> <td>M&amp;E-PerDiem</td> <td>51.00</td> <td>OTHER</td> </tr> </tbody> </table>	Delete	Copy	Itemize	Date	Expense Description	Expense Category	Cost	Payment Method	<input type="checkbox"/>	<input type="button" value="Copy"/>	<input type="button" value="Itemize"/>	03/24/2008	Airline Flight	COM. CARRIER	425.00	AGENCY CAR	<input type="checkbox"/>	<input type="button" value="Copy"/>	<input type="button" value="Itemize"/>	03/24/2008	Hotel Tax	LODGING TAX	100.00	GOVCC	<input type="checkbox"/>	<input type="button" value="Copy"/>	<input type="button" value="Itemize"/>	03/24/2008	Lodging - Actuals	Lodging-PerDiem	371.00	GOVCC	<input type="checkbox"/>	<input type="button" value="Copy"/>	<input type="button" value="Itemize"/>	03/24/2008	M&E	M&E-PerDiem	38.25	OTHER	<input type="checkbox"/>	<input type="button" value="Copy"/>	<input type="button" value="Itemize"/>	03/24/2008	TMC Transaction Fees	TRANSACTION FEES	22.25	AGENCY CAR	<input type="checkbox"/>	<input type="button" value="Copy"/>	<input type="button" value="Itemize"/>	03/24/2008	Taxi	Transport	75.00	OTHER	<input type="checkbox"/>	<input type="button" value="Copy"/>	<input type="button" value="Itemize"/>	03/25/2008	Lodging - Actuals	Lodging-PerDiem	371.00	GOVCC	<input type="checkbox"/>	<input type="button" value="Copy"/>	<input type="button" value="Itemize"/>	03/25/2008	M&E	M&E-PerDiem	51.00	OTHER	<input type="checkbox"/>	<input type="button" value="Copy"/>	<input type="button" value="Itemize"/>	03/26/2008	Lodging - Actuals	Lodging-PerDiem	371.00	GOVCC	<input type="checkbox"/>	<input type="button" value="Copy"/>	<input type="button" value="Itemize"/>	03/26/2008	M&E	M&E-PerDiem	51.00	OTHER
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4a	<p>➤ Enter the forgotten cost on an empty line: Airport Shuttle \$30.00</p>  <p>➤ Click the <b>Save</b> (<i>Expense Changes</i>) button</p>																										
5	<p>Click <b>Document Status</b> on the <i>Document Toolbar</i> to view the Document History</p>  <p><b>Status for 8EKC0001</b></p> <p><b>Quick Tip</b> The Signature PIN is case sensitive! <a href="#">more</a></p> <p><b>For this Document you can:</b>  <b>Stamp</b> and Submit Document  <b>Adjustments</b> Go To Adjustments  <b>Back</b> <b>Continue</b></p> <p>Status to Apply: APPROVED</p> <p>Signature PIN: <input type="text"/></p> <p>Reason: <input type="text"/></p> <p>Remarks: <input type="text"/></p> <p><input type="checkbox"/> Stamp Document Without Adjustment</p> <p><b>Document Routing</b> <span style="float: right;">This is the routing path the current document will take once routed</span></p> <table border="1"> <thead> <tr> <th>Name</th> <th>Status</th> <th>Level</th> </tr> </thead> <tbody> <tr> <td>Jackie Schreckengost</td> <td>APPROVED</td> <td>1</td> </tr> </tbody> </table> <p><b>Document History</b> <span style="float: right;">This is the status history for this document</span></p> <table border="1"> <thead> <tr> <th>Date/Time</th> <th>Status</th> <th>Name</th> <th>Remarks</th> <th>Reason Desc</th> </tr> </thead> <tbody> <tr> <td>07/29/08 6:52AM</td> <td>CREATED</td> <td>Erin Cobbs</td> <td></td> <td></td> </tr> <tr> <td>07/29/08 7:00AM</td> <td>SIGNED</td> <td>Erin Cobbs</td> <td>Actual Lodging authorized not to exceed 175%</td> <td></td> </tr> <tr> <td>07/29/08 7:02AM</td> <td>ADJUSTED</td> <td>Erin Cobbs</td> <td></td> <td></td> </tr> </tbody> </table> <p><b>Note:</b> The Document History will show all of the document status. Because you had to use your Signature PIN to make the changes, the status is already adjusted.</p>	Name	Status	Level	Jackie Schreckengost	APPROVED	1	Date/Time	Status	Name	Remarks	Reason Desc	07/29/08 6:52AM	CREATED	Erin Cobbs			07/29/08 7:00AM	SIGNED	Erin Cobbs	Actual Lodging authorized not to exceed 175%		07/29/08 7:02AM	ADJUSTED	Erin Cobbs		
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