

### **Exercise #3a: Travel Authorization (Copying TA/Adding new ACCS)**

*Objectives:*

- Create a new TA by copying from an existing TA
- Adding a new accounting code

*Notes:*

*This exercise covers how to copy an authorization with similar information from one authorization to another, thereby eliminating repetitive document entry steps. You may also use this process when you have multiple travelers who are going to the same travel location. Rather than creating a new document for each traveler, create the authorization for one traveler and save it. Open the authorization, replace the social security number, assign a new travel authorization number, make any necessary changes, and save the document with a new name.*

*In this example you will copy the trip authorization for the same traveler who is traveling to the same per diem location incurring the same travel expenses but for a different period of time.*

*To copy a document to another traveler, you must have Group Administrator access.*

*You will also learn how to add a new ACCS.*

*You will copy the TA from Exercise 2a.*

*Instructions:* Execute the following steps:

You have been asked to return to Kansas City, MO to give training on July 23-July 26. You will copy from your previous Travel Authorization to Kansas City. You will need to change the dates of your trip. You will also need to add a new ACCS being provided by the office you are giving training to.

#### **Estimated Expenses**

\$165.00 = Round-trip air fare

\$22.25 = Transaction Fee

73 miles one way to airport using private vehicle (POV) - person

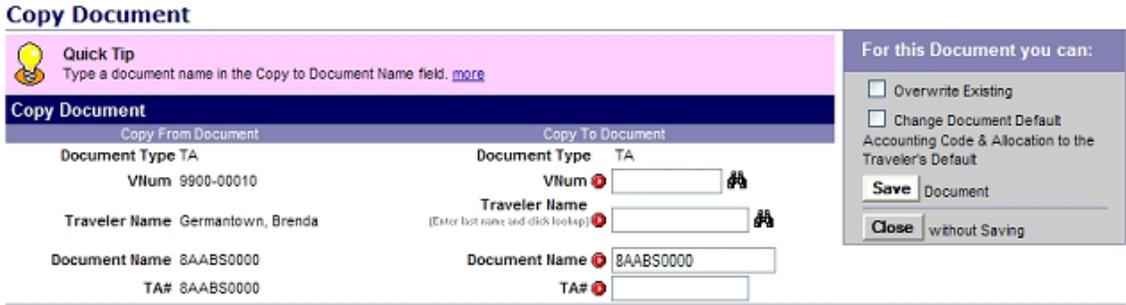
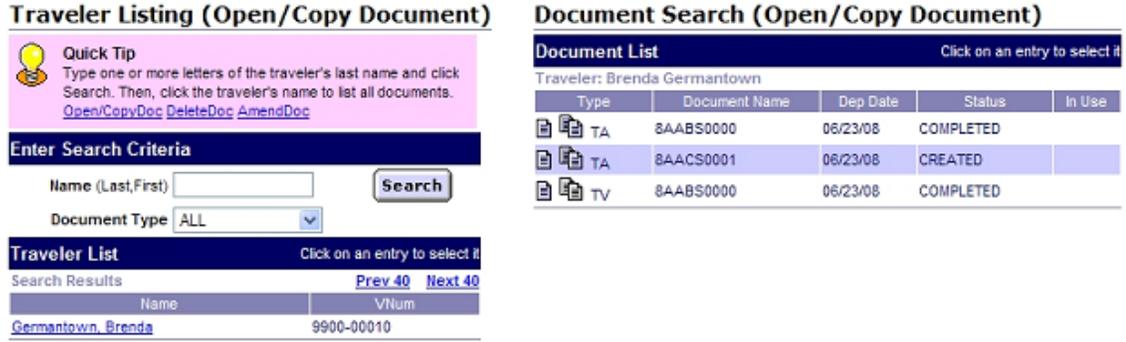
\$300 for Rental Car

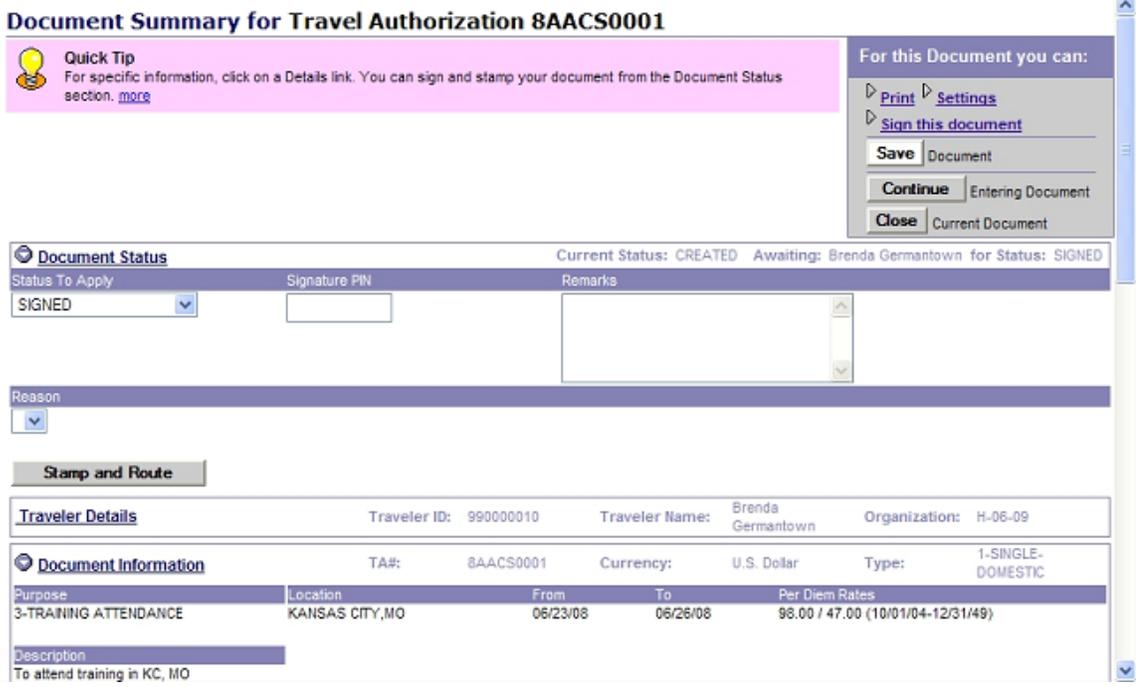
\$65 for Rental Car Gas

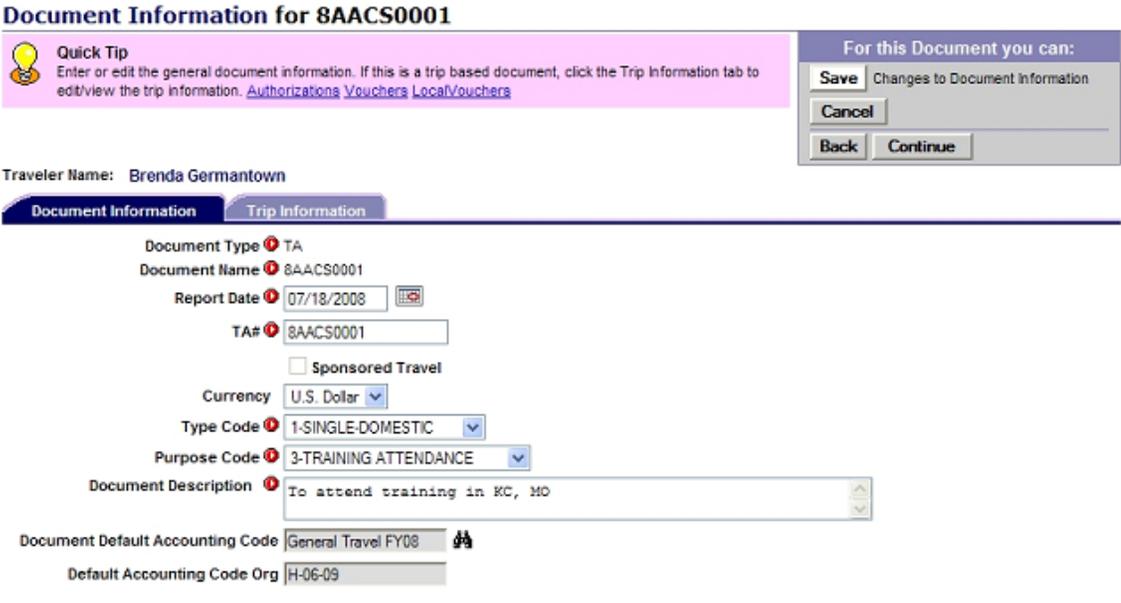
\$30 for Parking

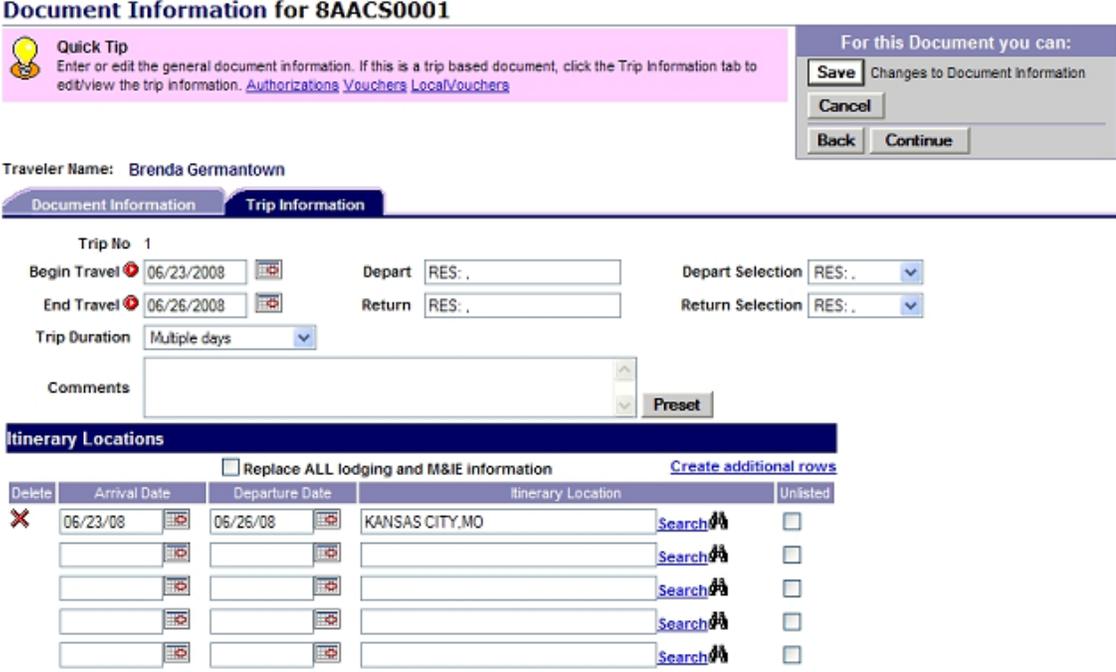
\$100 for Hotel Tax

Step	Action																			
1	<p>From the <i>Home</i> page:</p> <p>➤ Click <b>Open/Copy Document</b> from the <i>Document Toolbar</i></p>																			
2	<p>The <i>Open/Copy Document</i> page opens.</p> <div style="display: flex; justify-content: space-between;"> <div data-bbox="302 541 781 884" style="width: 45%;"> <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 style="float: right;">Click on an entry to select it</span></p> <p>Search Results <span style="float: right;"><a href="#">Prev 40</a> <a href="#">Next 40</a></span></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 70%;">Name</th> <th>VNum</th> </tr> </thead> <tbody> <tr> <td><a href="#">Germantown, Brenda</a></td> <td>9900-00010</td> </tr> </tbody> </table> </div> <div data-bbox="824 541 1409 716" style="width: 45%;"> <p><b>Document Search (Open/Copy Document)</b></p> <p><b>Document List</b> <span style="float: right;">Click on an entry to select it</span></p> <p>Traveler: Brenda Germantown</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Type</th> <th style="width: 40%;">Document Name</th> <th style="width: 15%;">Dep Date</th> <th style="width: 15%;">Status</th> <th style="width: 20%;">In Use</th> </tr> </thead> <tbody> <tr> <td> TA</td> <td>8AABS0000</td> <td>06/23/08</td> <td>COMPLETED</td> <td></td> </tr> <tr> <td> TV</td> <td>8AABS0000</td> <td>06/23/08</td> <td>COMPLETED</td> <td></td> </tr> </tbody> </table> </div> </div> <p>Click the <b>Copy</b>  icon of the travel authorization document you wish to copy</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>✓ For individual users, this screen will only show you as the traveler and your travel documents.</li> <li>✓ For Group Administrators this screen will show only those travelers that have created travel documents. A search may be completed prior to clicking on the traveler's name to bring up their travel documents.</li> </ul>	Name	VNum	<a href="#">Germantown, Brenda</a>	9900-00010	Type	Document Name	Dep Date	Status	In Use	 TA	8AABS0000	06/23/08	COMPLETED		 TV	8AABS0000	06/23/08	COMPLETED	
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Step	Action
3	<p>The <i>Copy Document</i> page appears.</p>  <ul style="list-style-type: none"> <li>➤ Enter the <i>Vendor Number</i> or <i>Traveler Name</i> or you may use the <b>Lookup</b>  icon</li> <li>➤ Tab to or Click in the <b>Document Name</b> field</li> <li>➤ Enter the <i>Document Name (YFMLS0001)</i></li> <li>➤ Enter the <i>TA# (YFMLS0001)</i></li> <li>➤ Click <b>Save</b> (<i>Document</i>) button</li> <li>➤ At the prompt “<i>Document was copied successfully</i>” click <b>OK</b></li> </ul> <p><i>Note: When typing in a vendor number do not use the dash. After typing in the traveler information, do not press ENTER. It will take you to a blank screen and you will have to start the process over.</i></p>
4	<p>The <i>Home</i> page appears.</p> <ul style="list-style-type: none"> <li>➤ Click <b>Open/Copy Document</b> from the <i>Document Toolbar</i></li> </ul>
5	<p>The <i>Open/Copy Document</i> page appears.</p>  <ul style="list-style-type: none"> <li>➤ Click on the <b>Open Document</b>  icon of the document you just created</li> </ul>

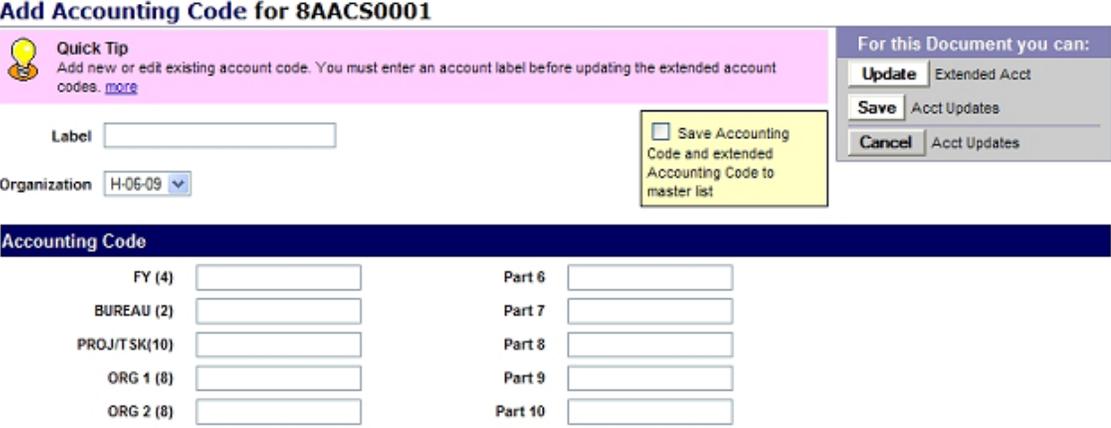
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6	<p>The <i>Document Summary</i> page appears.</p>  <p><b>Document Summary for Travel Authorization 8AACS0001</b></p> <p><b>Quick Tip</b> For specific information, click on a Details link. You can sign and stamp your document from the Document Status section. <a href="#">more</a></p> <p><b>For this Document you can:</b>  <a href="#">Print</a> <a href="#">Settings</a>  <a href="#">Sign this document</a>  <input type="button" value="Save"/> Document  <input type="button" value="Continue"/> Entering Document  <input type="button" value="Close"/> Current Document</p> <p><b>Document Status</b> <span style="float: right;">Current Status: CREATED    Awaiting: Brenda Germantown for Status: SIGNED</span></p> <table border="1"> <thead> <tr> <th>Status To Apply</th> <th>Signature PIN</th> <th>Remarks</th> </tr> </thead> <tbody> <tr> <td>SIGNED</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table> <p><b>Reason</b> <input type="button" value="v"/></p> <p><b>Stamp and Route</b></p> <p><b>Traveler Details</b>  Traveler ID: 990000010    Traveler Name: Brenda Germantown    Organization: H-06-09</p> <p><b>Document Information</b>  TA#: 8AACS0001    Currency: U.S. Dollar    Type: 1-SINGLE-DOMESTIC</p> <table border="1"> <thead> <tr> <th>Purpose</th> <th>Location</th> <th>From</th> <th>To</th> <th>Per Diem Rates</th> </tr> </thead> <tbody> <tr> <td>3-TRAINING ATTENDANCE</td> <td>KANSAS CITY,MO</td> <td>06/23/08</td> <td>06/26/08</td> <td>98.00 / 47.00 (10/01/04-12/31/49)</td> </tr> </tbody> </table> <p><b>Description</b> To attend training in KC, MO</p> <p>➤ Click on <b>Document Information</b> in the <i>Document Toolbar</i></p>	Status To Apply	Signature PIN	Remarks	SIGNED	<input type="text"/>	<input type="text"/>	Purpose	Location	From	To	Per Diem Rates	3-TRAINING ATTENDANCE	KANSAS CITY,MO	06/23/08	06/26/08	98.00 / 47.00 (10/01/04-12/31/49)
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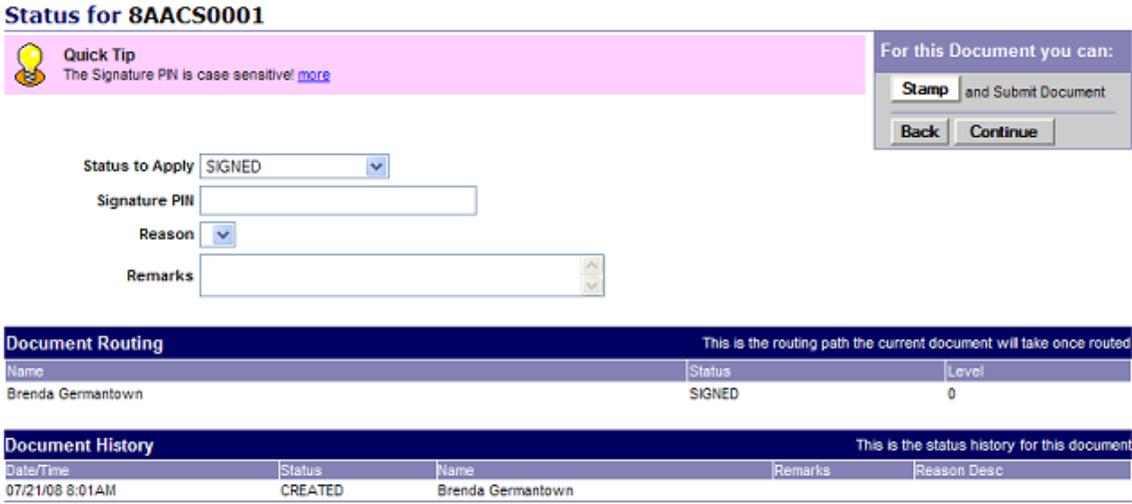
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7	<p>The <i>Document Information</i> page appears with the <i>Document Information</i> tab highlighted and fields displaying the previous information</p>  <p><b>Document Information for 8AACS0001</b></p> <p><b>Quick Tip</b> Enter or edit the general document information. If this is a trip based document, click the Trip Information tab to edit/view the trip information. <a href="#">Authorizations</a> <a href="#">Vouchers</a> <a href="#">LocalVouchers</a></p> <p><b>For this Document you can:</b>  <input type="button" value="Save"/> Changes to Document Information  <input type="button" value="Cancel"/>  <input type="button" value="Back"/> <input type="button" value="Continue"/></p> <p>Traveler Name: Brenda Germantown</p> <p><b>Document Information</b>   <b>Trip Information</b></p> <p>Document Type: TA  Document Name: 8AACS0001  Report Date: 07/18/2008  TAF: 8AACS0001  <input type="checkbox"/> Sponsored Travel  Currency: U.S. Dollar  Type Code: 1-SINGLE-DOMESTIC  Purpose Code: 3-TRAINING ATTENDANCE  Document Description: To attend training in KC, MO  Document Default Accounting Code: General Travel FY08  Default Accounting Code Org: H-06-09</p> <ul style="list-style-type: none"> <li>➤ Change the <i>Document Description</i> from <b>attend</b> to <i>GIVE</i></li> <li>➤ Click the <i>Trip Information</i> tab</li> </ul>

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8	<p>The <i>Document Information</i> page appears with the <i>Trip Information</i> tab highlighted and fields displaying the previous information.</p>  <p><b>Document Information for 8AACS0001</b></p> <p><b>Quick Tip</b> Enter or edit the general document information. If this is a trip based document, click the Trip Information tab to edit/view the trip information. <a href="#">Authorizations</a> <a href="#">Vouchers</a> <a href="#">LocalVouchers</a></p> <p>For this Document you can:  <input type="button" value="Save"/> Changes to Document Information  <input type="button" value="Cancel"/>  <input type="button" value="Back"/> <input type="button" value="Continue"/></p> <p>Traveler Name: Brenda Germantown</p> <p>Document Information <b>Trip Information</b></p> <p>Trip No 1</p> <p>Begin Travel <input type="text" value="06/23/2008"/> <input type="button" value="Calendar"/> Depart RES: <input type="text" value="RES."/> Depart Selection RES: <input type="button" value="v"/>  End Travel <input type="text" value="06/26/2008"/> <input type="button" value="Calendar"/> Return RES: <input type="text" value="RES."/> Return Selection RES: <input type="button" value="v"/>  Trip Duration <input type="text" value="Multiple days"/> <input type="button" value="v"/>  Comments <input type="text"/> <input type="button" value="Preset"/></p> <p><b>Itinerary Locations</b>  <input type="checkbox"/> Replace ALL lodging and M&amp;IE information <a href="#">Create additional rows</a></p> <table border="1"> <thead> <tr> <th>Delete</th> <th>Arrival Date</th> <th>Departure Date</th> <th>Itinerary Location</th> <th>Unlisted</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="text" value="06/23/08"/> <input type="button" value="Calendar"/></td> <td><input type="text" value="06/26/08"/> <input type="button" value="Calendar"/></td> <td><input type="text" value="KANSAS CITY,MO"/> <input type="button" value="Search"/> <input type="button" value="v"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="text"/> <input type="button" value="Calendar"/></td> <td><input type="text"/> <input type="button" value="Calendar"/></td> <td><input type="text"/> <input type="button" value="Search"/> <input type="button" value="v"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="text"/> <input type="button" value="Calendar"/></td> <td><input type="text"/> <input type="button" value="Calendar"/></td> <td><input type="text"/> <input type="button" value="Search"/> <input type="button" value="v"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="text"/> <input type="button" value="Calendar"/></td> <td><input type="text"/> <input type="button" value="Calendar"/></td> <td><input type="text"/> <input type="button" value="Search"/> <input type="button" value="v"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="text"/> <input type="button" value="Calendar"/></td> <td><input type="text"/> <input type="button" value="Calendar"/></td> <td><input type="text"/> <input type="button" value="Search"/> <input type="button" value="v"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table> <ul style="list-style-type: none"> <li>➤ Change the <i>Begin Travel</i> and <i>Arrival Date</i> from 6/23 to <b>7/23</b></li> <li>➤ Change the <i>End Travel</i> and the <i>Departure Date</i> from 6/26 to <b>7/26</b></li> <li>➤ Check the <i>Replace ALL lodging and M&amp;IE information</i> checkbox</li> <li>➤ Click <input type="button" value="Save"/> (<i>Changes to Document Information</i>) button</li> <li>➤ Click <a href="#">Expenses</a> on the <i>Document Toolbar</i></li> </ul>	Delete	Arrival Date	Departure Date	Itinerary Location	Unlisted	<input checked="" type="checkbox"/>	<input type="text" value="06/23/08"/> <input type="button" value="Calendar"/>	<input type="text" value="06/26/08"/> <input type="button" value="Calendar"/>	<input type="text" value="KANSAS CITY,MO"/> <input type="button" value="Search"/> <input type="button" value="v"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> <input type="button" value="Calendar"/>	<input type="text"/> <input type="button" value="Calendar"/>	<input type="text"/> <input type="button" value="Search"/> <input type="button" value="v"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> <input type="button" value="Calendar"/>	<input type="text"/> <input type="button" value="Calendar"/>	<input type="text"/> <input type="button" value="Search"/> <input type="button" value="v"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> <input type="button" value="Calendar"/>	<input type="text"/> <input type="button" value="Calendar"/>	<input type="text"/> <input type="button" value="Search"/> <input type="button" value="v"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> <input type="button" value="Calendar"/>	<input type="text"/> <input type="button" value="Calendar"/>	<input type="text"/> <input type="button" value="Search"/> <input type="button" value="v"/>	<input type="checkbox"/>
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9	<p>The <i>Edit/Enter Expenses</i> page appears with M&amp;IE and Lodging costs.</p>  <p><b>Edit/Enter Expenses for Travel Authorization: 8AACS0001</b></p> <p><b>Quick Tip</b> Enter or edit expenses. Each line below displays a different expense. To edit expense details not displayed below, click the Details icon next to the expense description. To delete an expense, use the check box. Enter all expenses and changes and click Save. <a href="#">more</a></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 colspan="2">Expense Entry</th> <th>Customize Display</th> <th>Add Rows</th> <th>Prev 25</th> <th>Next 25</th> </tr> <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 Met</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td></td> <td></td> <td>06/23/2008</td> <td>Airline Flight</td> <td>COM. CARRIER</td> <td>265.00</td> <td>AGENCY CAR</td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td></td> <td>06/23/2008</td> <td>Hotel Tax</td> <td>LODGING TAX</td> <td>100.00</td> <td>GOVCC</td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td></td> <td>06/23/2008</td> <td>1POC-Private Vhcle</td> <td>MILEAGE</td> <td>118.26</td> <td>OTHER</td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td></td> <td>06/23/2008</td> <td>Parking Fees</td> <td>OTHER TRAVEL</td> <td>30.00</td> <td>OTHER</td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td></td> <td>06/23/2008</td> <td>Rental Car</td> <td>RENTAL CAR</td> <td>300.00</td> <td>GOVCC</td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td></td> <td>06/23/2008</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></td> <td></td> <td>06/23/2008</td> <td>Gas-Rental/Govt Car</td> <td>Transport</td> <td>65.00</td> <td>OTHER</td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td></td> <td>07/23/2008</td> <td>Lodging</td> <td>Lodging-PerDiem</td> <td>98.00</td> <td>GOVCC</td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td></td> <td>07/23/2008</td> <td>M&amp;IE</td> <td>M&amp;IE-PerDiem</td> <td>35.25</td> <td>OTHER</td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td></td> <td>07/24/2008</td> <td>Lodging</td> <td>Lodging-PerDiem</td> <td>98.00</td> <td>GOVCC</td> </tr> </tbody> </table> <p><b>For this Page you can:</b></p> <p><input type="button" value="Display Express Expense Screen"/></p> <p><input type="button" value="Save"/> Expense Changes</p> <p><input type="button" value="Reset"/> All Lodging</p> <p><input type="button" value="Clear"/> Changes</p> <p><input type="button" value="Back"/> <input type="button" value="Continue"/></p> <p>➤ Make changes to the date(s) and cost(s)</p> <p>➤ Click <input type="button" value="Save"/> (<i>Expense Changes</i>) button</p> <p>➤ Click <a href="#">Accounting</a> in the <i>Document Toolbar</i></p>	Expense Entry		Customize Display	Add Rows	Prev 25	Next 25	Delete	Copy	Itemize	Date	Expense Description	Expense Category	Cost	Payment Met	<input type="checkbox"/>			06/23/2008	Airline Flight	COM. CARRIER	265.00	AGENCY CAR	<input type="checkbox"/>			06/23/2008	Hotel Tax	LODGING TAX	100.00	GOVCC	<input type="checkbox"/>			06/23/2008	1POC-Private Vhcle	MILEAGE	118.26	OTHER	<input type="checkbox"/>			06/23/2008	Parking Fees	OTHER TRAVEL	30.00	OTHER	<input type="checkbox"/>			06/23/2008	Rental Car	RENTAL CAR	300.00	GOVCC	<input type="checkbox"/>			06/23/2008	TMC Transaction Fees	TRANSACTION FEES	22.25	AGENCY CAR	<input type="checkbox"/>			06/23/2008	Gas-Rental/Govt Car	Transport	65.00	OTHER	<input type="checkbox"/>			07/23/2008	Lodging	Lodging-PerDiem	98.00	GOVCC	<input type="checkbox"/>			07/23/2008	M&IE	M&IE-PerDiem	35.25	OTHER	<input type="checkbox"/>			07/24/2008	Lodging	Lodging-PerDiem	98.00	GOVCC
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10	<p>This brings up the <i>Available Accounting Code</i> page.</p>  <p><b>Available Accounting Code for 8AACS0001</b></p> <p><b>Quick Tip</b> To select an account code, click the label link. To search by label, type some of the label in the field and click the Search button. To retrieve all account codes with the same label from all orgs, type the entire label and click the Retrieve button. <a href="#">more</a></p> <p>For this Document you can:  <input type="button" value="Add"/> New Accounting Code  <input type="button" value="Back"/> <input type="button" value="Continue"/></p> <p><b>Enter Search Criteria</b></p> <p>Accounting Code <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Retrieve"/></p> <p><b>Master Accounting Code</b> <span style="float: right;">Click Accounting Code Label to add to Document</span></p> <p>Search Results <span style="float: right;"><a href="#">Prev 20</a> <a href="#">Next 20</a></span></p> <table border="1"> <thead> <tr> <th>Organization</th> <th>Label</th> <th>Classification Code</th> </tr> </thead> <tbody> <tr> <td>H-06-09</td> <td><a href="#">AAA</a></td> <td>2008- 14- BP1AANAP00- 06000000- 00000000- ----</td> </tr> <tr> <td>H-06-09</td> <td><a href="#">General Travel FY08</a></td> <td>2008- 14- E8K3N5SP00- 06020000- 00000000- ----</td> </tr> <tr> <td>H-06-09</td> <td><a href="#">Project Fish FY08</a></td> <td>2008- 14- 4BM1J10P00- 06020000- 00000000- ----</td> </tr> <tr> <td>H-06-09</td> <td><a href="#">Project Ocean FY08</a></td> <td>2008- 14- 89WGN40P00- 06020000- 00000000- ----</td> </tr> </tbody> </table> <p><b>Accounting Code for 8AACS0001</b> <span style="float: right;">Click an item to edit/delete it</span></p> <table border="1"> <thead> <tr> <th>Organization</th> <th>Label</th> <th>Default</th> <th>Classification Code</th> <th>Extended Code</th> </tr> </thead> <tbody> <tr> <td> H-06-09</td> <td>General Travel FY08</td> <td><input checked="" type="radio"/></td> <td>2008- 14- E8K3N5SP00- 06020000- 00000000- ----</td> <td><a href="#">Extended</a></td> </tr> </tbody> </table> <p> Edit  Delete</p> <ul style="list-style-type: none"> <li>➤ Click on the <b>Delete</b>  icon next to the ACCS code listed in the <i>Accounting Code for {document #}</i> to remove the default ACCS.</li> <li>➤ At the prompt, “Are you sure you want to delete this record?” Click <b>OK</b></li> <li>➤ Click the <b>Add</b> (<i>New Accounting Code</i>) button</li> </ul>	Organization	Label	Classification Code	H-06-09	<a href="#">AAA</a>	2008- 14- BP1AANAP00- 06000000- 00000000- ----	H-06-09	<a href="#">General Travel FY08</a>	2008- 14- E8K3N5SP00- 06020000- 00000000- ----	H-06-09	<a href="#">Project Fish FY08</a>	2008- 14- 4BM1J10P00- 06020000- 00000000- ----	H-06-09	<a href="#">Project Ocean FY08</a>	2008- 14- 89WGN40P00- 06020000- 00000000- ----	Organization	Label	Default	Classification Code	Extended Code	H-06-09	General Travel FY08	<input checked="" type="radio"/>	2008- 14- E8K3N5SP00- 06020000- 00000000- ----	<a href="#">Extended</a>
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Step	Action
11	<p>This will bring up the <i>Add Accounting Code</i> page.</p>  <p>Enter the following information (use capital letters):</p> <ul style="list-style-type: none"> <li>➤ <b>LABEL</b> = <i>(Your Training Initials) Weather Code</i></li> <li>➤ <b>ORGANIZATION</b> = <i>Your Training Org</i></li> <li>➤ <b>FY(4)</b> = <i>Current FY</i></li> <li>➤ <b>BUREAU (2)</b> = <i>14</i></li> <li>➤ <b>PROJ/TSK (10)</b> = <i>F8P1BMFP00</i></li> <li>➤ <b>ORG 1 (8)</b> = <i>06020000</i></li> <li>➤ <b>ORG 2 (8)</b> = <i>00000000</i></li> </ul> <ul style="list-style-type: none"> <li>➤ Check the <b>Master List</b> checkbox</li> <li>➤ Click the <b>Save</b> (<i>Acct Updates</i>) button</li> </ul> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>✓ <i>Do not include any special characters in the label field. The system will only recognize it for that current document, even if the checkbox for the master list was checked.</i></li> <li>✓ <i>The project and task codes should be entered in capital letters.</i></li> </ul>
12	Click on <b>Totals</b> in the <i>Document Toolbar</i> to open up the <i>Total Details</i> page if you wish to view the totals
13	Click on <b>Preview Document</b> in the <i>Document Toolbar</i> to have a new window open with the print preview of your travel document.

Step	Action																
14	<p>Click on <b>Document Status</b> in the <i>Document Toolbar</i> to open up the <i>Status</i> page. The page will default with <b>Signed</b> in the <b>Status to Apply</b> field.</p>  <p><b>Status for 8AACS0001</b></p> <p><b>Quick Tip</b> The Signature PIN is case sensitive! <a href="#">more</a></p> <p>For this Document you can: <b>Stamp</b> and Submit Document <b>Back</b> <b>Continue</b></p> <p>Status to Apply: SIGNED Signature PIN: <input type="text"/> Reason: <input type="text"/> Remarks: <input type="text"/></p> <p><b>Document Routing</b> <small>This is the routing path the current document will take once routed</small></p> <table border="1"> <thead> <tr> <th>Name</th> <th>Status</th> <th>Level</th> </tr> </thead> <tbody> <tr> <td>Brenda Germantown</td> <td>SIGNED</td> <td>0</td> </tr> </tbody> </table> <p><b>Document History</b> <small>This is the status history for this document</small></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>07/21/08 8:01AM</td> <td>CREATED</td> <td>Brenda Germantown</td> <td></td> <td></td> </tr> </tbody> </table> <ul style="list-style-type: none"> <li>➤ Enter your <b>Signature PIN</b></li> <li>➤ Enter your <b>Remarks</b></li> <li>➤ Click the <b>Stamp</b> (<i>and Submit Document</i>) button</li> </ul> <p>The document will then be routed to the first level of the electronic approval process and you will be taken back to the <i>Home</i> page.</p>	Name	Status	Level	Brenda Germantown	SIGNED	0	Date/Time	Status	Name	Remarks	Reason Desc	07/21/08 8:01AM	CREATED	Brenda Germantown		
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15	<p>From the <i>Home</i> page click on the <b>Open Document</b>  icon which will take you to the <i>Open Document Signature</i> page.</p> <ul style="list-style-type: none"> <li>➤ Enter your <b>Signature PIN</b></li> <li>➤ Click the <b>Sign</b> (<i>to Review Document</i>) button</li> </ul> <p>The <i>Document Summary</i> page appears.</p> <ul style="list-style-type: none"> <li>➤ Change the status to <b>Completed</b></li> <li>➤ Enter your <b>Signature PIN</b></li> <li>➤ Enter your <b>Remarks</b></li> <li>➤ Check the checkbox <b>Stamp Without Adjustment</b></li> <li>➤ Click the <b>Stamp and Route</b> button.</li> </ul> <p><b>Note:</b> For training purposes ONLY – the routing/approval/DATALINK process is not done. To be able to create a voucher from authorization, the status must be set to “Complete.”</p>																