

Exercise #8a: Travel Authorization (Registration Fee-Includes Lodging/Meals)

- Objectives:**
- Create a travel authorization and indicate lodging and meals are included
 - Understand the Conference Screen

Notes: *This exercise covers how to create an authorization when lodging and/or meals are prepaid or provided as part of a registration or seminar fee.*

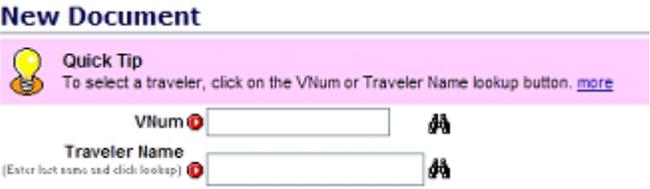
The lodging estimate must be reduced by the amount of prepaid lodging costs and/or the M&IE estimate must be reduced by the amount for meals provided.

Instructions: Execute the following steps:

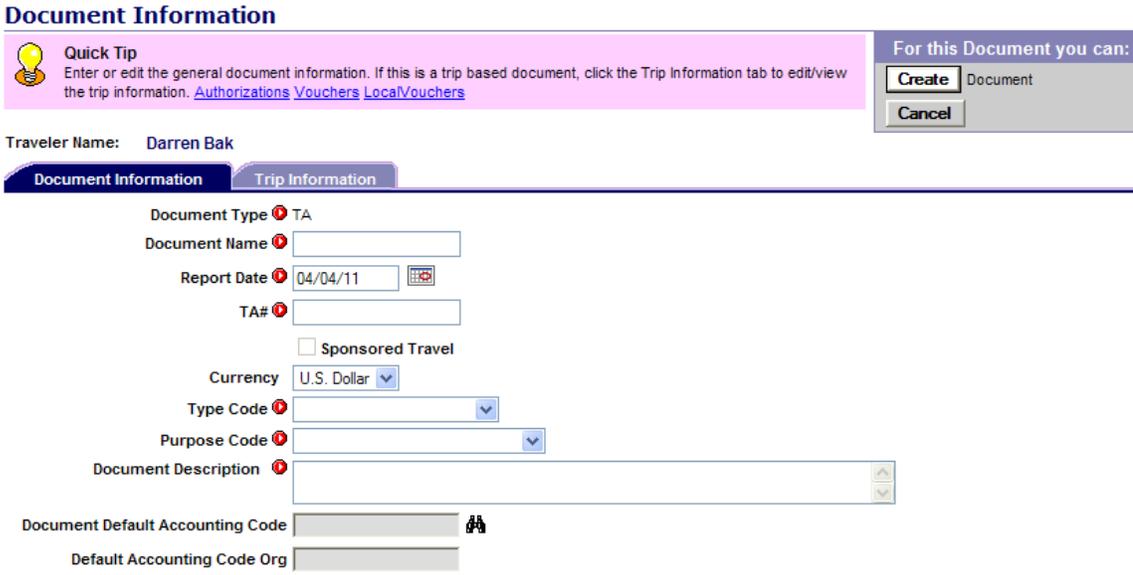
You are going to a software conference in Boston, MA on April 19th and 20th. You pay a registration fee using the office purchase card. This fee includes lodging for all 3 nights, breakfast and lunch for the two days of the conference and the conference fee.

Estimated Expenses

- \$450.00 = Round-trip air fare
- \$24.60 = Transaction Fee
- \$100 = Taxi Fare
- \$50 = Miscellaneous
- \$50 = Checked Baggage Fee

Step	Action
1	From the <i>Home</i> screen: ➤ Click Create New Document from the <i>Document Toolbar</i>
2	For a Group Administrator, you will need to select a traveler by clicking on the Lookup icon  by either the VNum or Traveler Name field. 

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2a	<p data-bbox="282 279 1333 348">If you chose VNum lookup icon, you will get a list of travelers you have access to showing in vendor number order.</p> <div data-bbox="282 386 1024 926">  <p data-bbox="282 386 1024 472">Enter Search Criteria</p> <p data-bbox="282 472 1024 506">VNum <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Cancel"/></p> <p data-bbox="282 506 1024 539">Search Results Click on an entry to select it</p> <p data-bbox="282 539 1024 573">Search Results Prev 20 Next 20</p> <table border="1" data-bbox="282 573 1024 926"> <thead> <tr> <th>VNum</th> <th>Last Name</th> <th>First Name</th> <th>MI</th> </tr> </thead> <tbody> <tr><td>0001-00001</td><td>Gaithersburg</td><td>Erin</td><td>R</td></tr> <tr><td>0001-00002</td><td>Gaithersburg</td><td>Jackie</td><td>A</td></tr> <tr><td>0001-00003</td><td>Gaithersburg</td><td>Joan</td><td>O</td></tr> <tr><td>0001-00004</td><td>Gaithersburg</td><td>Michael</td><td>I</td></tr> 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2b	<p>The <i>New Document</i> screen appears with your traveler’s name and vendor number filled in.</p> <ul style="list-style-type: none"> ➤ Click on the Document Type drop-down listing and select TA ➤ Click the Create (this Document) button
3	<p>The <i>Document Information</i> screen appears with the <i>Document Information</i> tab highlighted and fields displaying.</p>  <p>Document Information</p> <p>Quick Tip 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. Authorizations Vouchers LocalVouchers</p> <p>For this Document you can: Create Document Cancel</p> <p>Traveler Name: Darren Bak</p> <p>Document Information Trip Information</p> <p>Document Type ⓘ TA Document Name ⓘ <input type="text"/> Report Date ⓘ 04/04/11 <input type="text"/> TA# ⓘ <input type="text"/> <input type="checkbox"/> Sponsored Travel Currency U.S. Dollar <input type="text"/> Type Code ⓘ <input type="text"/> Purpose Code ⓘ <input type="text"/> Document Description ⓘ <input type="text"/> Document Default Accounting Code <input type="text"/> ⓘ Default Accounting Code Org <input type="text"/></p> <p>Enter the following information:</p> <ul style="list-style-type: none"> ➤ Document Name = <i>Same as TA#</i> ➤ TA# = <i>Use the next available one listed on your sheet</i> ➤ Type Code = <i>1-SINGLE-DOMESTIC</i> ➤ Purpose Code = <i>6-NON-REPORTABLE CONFERENCE</i> ➤ Document Description = <i>Attending Oracle Software Conference, Boston, MA</i>

Step	Action										
3a	<p>Click on the <i>Trip Information</i> tab. If you click the <i>Create</i> button prior to clicking the tab you will receive an error message, click OK and it will take you to this tab.</p> <p>Enter the following information in the top part of the screen:</p> <ul style="list-style-type: none"> ➤ Begin Travel = 4/18/## ➤ Depart = RES ➤ End Travel = 4/21/## ➤ Return = RES ➤ Comments = <i>Registration Fee paid with Purchase card pays for lodging, breakfast and lunch.</i> 										
3b	<p>The values selected in the Begin & End Travel dates will automatically populate in the <i>Itinerary Location</i> area. These dates must be filled in prior to filing in the <i>Itinerary Location</i> field.</p> <ul style="list-style-type: none"> ➤ Lookup or Enter the location (i.e. Boston, MA) ➤ Click the Create (<i>Document</i>) button <p>The <i>Document Information</i> screen still appears but the <i>Document Toolbar</i> now has different options available. It will also show your Document Name & TA#.</p> <ul style="list-style-type: none"> ➤ Click on Expenses in the <i>Document Toolbar</i> to bring up the <i>Edit/Enter Expenses</i> screen. 										
4	<p>Enter the following information on the <i>Edit/Enter Expenses</i> screen:</p> <table data-bbox="282 1262 922 1444"> <tr> <td>Airline Flight</td> <td>\$450.00 (Class = Y)</td> </tr> <tr> <td>TMC Transaction Fee</td> <td>\$24.60</td> </tr> <tr> <td>Taxi</td> <td>\$75.00</td> </tr> <tr> <td>Miscellaneous</td> <td>\$50.00</td> </tr> <tr> <td>Check Baggage Fees</td> <td>\$50.00</td> </tr> </table> <ul style="list-style-type: none"> ➤ Click the Save (<i>Expense Changes</i>) button when completed 	Airline Flight	\$450.00 (Class = Y)	TMC Transaction Fee	\$24.60	Taxi	\$75.00	Miscellaneous	\$50.00	Check Baggage Fees	\$50.00
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5a	<p>To enter the actual lodging cost information, click on the Show Expense Details  icon on the first line of lodging expenses. This will bring up a new window.</p> <div data-bbox="289 401 1425 850"> <p>Expense Details for Lodging-PerDiem 04/18/2011</p> <div data-bbox="293 436 1094 541"> <p> Quick Tip View or edit all details for this expense. Click the tab to see the respective expense details. To save changes to expense details, click the Use Expense Detail Updates button and on the main expense screen, Save expenses.</p> </div> <div data-bbox="1101 436 1425 541"> <p>For this page you can: <input type="button" value="Use"/> Expense Detail Updates <input type="button" value="Close"/> without Saving Expense Details</p> </div> <div data-bbox="293 552 1425 850"> <p>General Details Lodging Details</p> <p>Expense Date: 04/18/2011 Payment Method: GOVCC</p> <p>Expense Cost: 190.00 USD Allowed: 190.00 <input checked="" type="checkbox"/> Reimbursable <input type="checkbox"/> Taxable</p> <p>Quantity: 0 Rate: 0 Vendor: Accounting Code: </p> <p>Expense Category: Lodging-PerDiem Expense Description: Lodging</p> <p>Comments: <input type="text"/></p> </div> </div> <p>➤ Enter 0 in the Expense Cost field</p> <p>➤ Click <input type="button" value="Use"/> (<i>Expense Detail Updates</i>)</p>

Step	Action
5b	<p>Go to the next lodging cost information and click on the Show Expense Details  icon. In the new window do the following:</p> <ul style="list-style-type: none"> ➤ Enter 0 in the Expense Cost field ➤ Click the Lodging Details tab ➤ Click the Breakfast checkbox ➤ Click the Lunch checkbox ➤ Click Use (<i>Expense Detail Updates</i>) <div style="border: 1px solid black; padding: 5px;"> <p>Expense Details for Lodging-PerDiem 04/19/2011</p> <div style="display: flex; justify-content: space-between;"> <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <p> Quick Tip View or edit all details for this expense. Click the tab to see the respective expense details. To save changes to expense details, click the Use Expense Detail Updates button and on the main expense screen, Save expenses.</p> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <p>For this page you can:</p> <p>Use Expense Detail Updates</p> <p>Close without Saving Expense Details</p> </div> </div> <div style="display: flex; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; width: 60%;"> <p>General Details Lodging Details</p> <p><input type="checkbox"/> Conference Allowance</p> <p style="margin-left: 20px;">Conference % <input type="text"/></p> <p style="margin-left: 20px;">Conference Rate 0.00</p> <p style="margin-left: 20px;">Conference Description <input type="text"/></p> <p style="margin-left: 20px;">Sponsoring Agency <input type="text"/></p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 35%;"> <p>Leave Data</p> <p><input checked="" type="radio"/> None Hours <input type="text" value="0.00"/></p> <p><input type="radio"/> Annual</p> <p><input type="radio"/> Other</p> </div> </div> <div style="margin-top: 10px; display: flex; justify-content: space-between;"> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;"> <p>Meals Provided</p> <p><input checked="" type="checkbox"/> Breakfast</p> <p><input checked="" type="checkbox"/> Lunch</p> <p><input type="checkbox"/> Dinner</p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;"> <p>M&IE Override</p> <p style="margin-left: 20px;">Quarters <input type="text"/></p> <p style="margin-left: 20px;">M&IE Amount <input type="text"/></p> </div> </div> </div>
5c	<p>On the Enter/Edit Expenses page scroll to the right and in the same line you just added the expense</p> <ul style="list-style-type: none"> ➤ Enter 4/20/## in the Copy Through field ➤ Click the Save (<i>Expense Changes</i>) button when completed <div style="background-color: yellow; padding: 5px; border: 1px solid black; margin-top: 10px;"> <p>Note: Upon saving your data, your lodging amount should be zero and your M&IE amounts should be reduced.</p> </div>

Step	Action																		
6	<p>Click on DOC Conference in the <i>Document Toolbar</i> to open up the <i>DOC Conference</i> screen.</p> <p>DOC Conference</p> <div style="border: 1px solid black; padding: 5px;"> <p>Quick Tip  Enter the questions for determining Purpose Codes for Conferences. The logic that applies is that if question 1,2,3, or 4 are answered YES then Purpose Code 5-Reportable Conference is applied, if question 5 or 6 are answered "YES then Purpose Code 3-Training Attendance is applied, and if question 7 is answered YES then Purpose Code 6-Non-Reportable Conference is applied.</p> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <p>For this Page you can:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">Save</td> <td>DOC Additional Information Updates</td> </tr> <tr> <td style="padding: 2px;">Clear</td> <td>Updates</td> </tr> </table> </div> <p>Criteria for Determining Purpose Code for Conferences and Training</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">1. Does the Conference have a featured or keynote speaker from the Department of Commerce or any of its bureaus?</td> <td style="width: 100px;"><input type="text"/></td> </tr> <tr> <td style="padding: 2px;">2. Does the conference have staff from the Department of Commerce or any of its bureaus that are providing technical expertise (e.g., leading or participating in panel discussions, providing training, and/or presenting findings)?</td> <td><input type="text"/></td> </tr> <tr> <td style="padding: 2px;">3. Is the Department of Commerce or any of its bureaus hosting/sponsoring the conference (e.g., providing meeting planning services, logistics, and/or providing support by staffing the conference)?</td> <td><input type="text"/></td> </tr> <tr> <td style="padding: 2px;">4. Is the Department of Commerce or any of its bureaus providing direct funding towards the conference?</td> <td><input type="text"/></td> </tr> <tr> <td style="padding: 2px;">5. Does the conference include internal DOC related Workshops?</td> <td><input type="text"/></td> </tr> <tr> <td style="padding: 2px;">6. Is the conference a training session where staff from the Department of Commerce or any of its bureaus only attend (i.e., no other staff from other agencies) and will not participate in an official capacity?</td> <td><input type="text"/></td> </tr> <tr> <td style="padding: 2px;">7. If the conference does NOT include training and does not fit under any of the criteria above, enter YES here to indicate 6-Non-Reportable Conference as the trip purpose.</td> <td><input type="text"/></td> </tr> </table>	Save	DOC Additional Information Updates	Clear	Updates	1. Does the Conference have a featured or keynote speaker from the Department of Commerce or any of its bureaus?	<input type="text"/>	2. Does the conference have staff from the Department of Commerce or any of its bureaus that are providing technical expertise (e.g., leading or participating in panel discussions, providing training, and/or presenting findings)?	<input type="text"/>	3. Is the Department of Commerce or any of its bureaus hosting/sponsoring the conference (e.g., providing meeting planning services, logistics, and/or providing support by staffing the conference)?	<input type="text"/>	4. Is the Department of Commerce or any of its bureaus providing direct funding towards the conference?	<input type="text"/>	5. Does the conference include internal DOC related Workshops?	<input type="text"/>	6. Is the conference a training session where staff from the Department of Commerce or any of its bureaus only attend (i.e., no other staff from other agencies) and will not participate in an official capacity?	<input type="text"/>	7. If the conference does NOT include training and does not fit under any of the criteria above, enter YES here to indicate 6-Non-Reportable Conference as the trip purpose.	<input type="text"/>
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2. Does the conference have staff from the Department of Commerce or any of its bureaus that are providing technical expertise (e.g., leading or participating in panel discussions, providing training, and/or presenting findings)?	<input type="text"/>																		
3. Is the Department of Commerce or any of its bureaus hosting/sponsoring the conference (e.g., providing meeting planning services, logistics, and/or providing support by staffing the conference)?	<input type="text"/>																		
4. Is the Department of Commerce or any of its bureaus providing direct funding towards the conference?	<input type="text"/>																		
5. Does the conference include internal DOC related Workshops?	<input type="text"/>																		
6. Is the conference a training session where staff from the Department of Commerce or any of its bureaus only attend (i.e., no other staff from other agencies) and will not participate in an official capacity?	<input type="text"/>																		
7. If the conference does NOT include training and does not fit under any of the criteria above, enter YES here to indicate 6-Non-Reportable Conference as the trip purpose.	<input type="text"/>																		
6a	<p>Enter the following:</p> <p style="padding-left: 40px;">7. YES</p> <p>➤ Click Save (<i>DOC Additional Information Updates</i>)</p>																		
7	<p>Finish the process with your TA:</p> <ul style="list-style-type: none"> ➤ Verify Accounting ➤ Check the totals ➤ Preview the document ➤ Review Pre-Audits ➤ Stamp Document Signed ➤ Click Continue on Pre-Audit screen <p>FOR EMPLOYEES TRAVLERS – 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> screen where a message toward the bottom stating and email has been sent to “email address”.</p> <p>For EXCEPTED TRAVELERS – the <i>Home</i> screen will appear with the document appearing in the <i>Last Documents</i> area. The preparer will have to inform the Approving Official when the document is ready for approval in the system.</p>																		
<p>AWAIT TRAINER TO APPROVE ALL DOCUMENTS BEFORE CONTINUING WITH THE NEXT EXERCISE.</p>																			