

**Exercise #9b: Amendment to Travel Authorization (Remove Foreign Location)**

Objectives: • Amend a Travel Authorization

**Notes:**

*If a foreign location is on the original authorization and that part of the trip changes, the authorization will need to be amended to remove the foreign location due to the object classes being used for domestic and foreign travel. However, if the trip was already ticketed, an amendment can not be done. If the tickets hadn't been issued yet, the amendment needs to be done prior to voucher being created.*

*If tickets have been issued, contact Client Services Help Desk for further instructions on how to work on Amending the TA.*

Instructions: Execute the following steps:

The trip to Toronto, Canada has been canceled and the tickets were not issued. An amendment will need to be done to the authorization to remove the foreign location and any costs associated with that part of the trip.

Step	Action
1	From the <b>Home</b> screen: ➤ Click <b>Amend Document</b> from the <b>Document Toolbar</b>
2	The <b>Traveler Listing/Document Search (Amendment)</b> screen will appear.  Travelers will only see their information and this screen will only show those documents that have the status of DATALINKED.  Group Administrator will see only those travelers in their group whom have DATALINKED documents. The Group Administrator will need to click the travelers name in order to see their documents.  ➤ Click the <b>Amend</b>  icon of the document you wish to amend (use Exercise 9a#)
<p><b>Notes:</b> For Training Purposes the status will say <b>COMPLETED</b>, not <b>DATALINKED</b>.</p>	

Step	Action				
3	<p>The <i>Amendment</i> screen appears.</p> <ul style="list-style-type: none"> <li>➤ Enter <i>Foreign Part of Trip was canceled tickets not issued</i> in the <b>Comments</b> field</li> <li>➤ Enter <i>Signature PIN</i></li> <li>➤ Click <input type="button" value="Create"/> (<i>New Amendment</i>) button</li> </ul>				
4	<p>The <i>Document Information</i> screen appears.</p> <ul style="list-style-type: none"> <li>➤ <b>Type Code = 1-SINGLE-DOMESTIC</b></li> <li>➤ <b>Document Description = Site Visit to Buffalo, NY</b></li> <li>➤ Click <input type="button" value="Create"/> (<i>Document</i>) button</li> <li>➤ Click on the <i>Trip Information</i> tab</li> <li>➤ <b>Delete the 2<sup>nd</sup> Location = Toronto, CAN by checking the checkbox</b></li> <li>➤ <b>Click OK</b></li> <li>➤ Click on the <i>Trip Information</i> tab</li> <li>➤ <b>End Travel = 6/13/##</b></li> <li>➤ Click the <input type="button" value="Create"/> (<i>Changes to Document Information</i>)</li> </ul>				
5	<p>Click on <b>Expenses</b> in the <i>Document Toolbar</i> to bring up the <i>Edit/Enter Expenses</i> screen.</p> <p>Modify the following information:</p> <table border="0" data-bbox="282 1108 922 1178"> <tr> <td>Airline Flight Traveler</td> <td>\$450.00 (Class = Y)</td> </tr> <tr> <td>TMC Transaction Fee</td> <td>\$25.43</td> </tr> </table> <ul style="list-style-type: none"> <li>➤ Click the <input type="button" value="Save"/> (<i>Expense Changes</i>) button when completed</li> </ul> <p><b>Note: In this training scenario, this trip is less than 30 days and had not been ticketed yet, so we are able to change the common carrier costs.</b></p>	Airline Flight Traveler	\$450.00 (Class = Y)	TMC Transaction Fee	\$25.43
Airline Flight Traveler	\$450.00 (Class = Y)				
TMC Transaction Fee	\$25.43				
6	<p>Click on <b>Accounting</b> in the <i>Document Toolbar</i> to open up the <i>Available Accounting Code</i> screen.</p> <ul style="list-style-type: none"> <li>➤ Verify there is current FY accounting code</li> <li>➤ If there is not, click on one from your master list</li> </ul>				

Step	Action
7	<p>Finish the process with your TA:</p> <ul style="list-style-type: none"><li>➤ Check the totals</li><li>➤ Preview the document</li><li>➤ Review Pre-Audits</li><li>➤ Stamp Document Signed</li><li>➤ Click Continue on Pre-Audit screen</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 Home screen where a message will be displayed toward the bottom stating and email has been sent to “email address”—FOR EMPLOYEES ONLY</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>

