

**Exercise #7a: Travel Authorization (Conference Lodging Allowance/Leave)**

- Objectives:**
- Create a travel authorization where conference lodging is allowed
  - Understand the Conference Screen
  - Understand how to indicate Annual Leave

**Notes:** *This exercise covers how to create an authorization for a government sponsored conference using the conference lodging allowance.*

*It also covers how to incorporate annual leave or non-duty days in conjunction with official travel. No lodging and M&IE allowances are paid on days when annual/non-duty leave exceeds 4 hours.*

*When leave is taken either at the beginning or end of the trip, the traveler will have to do override on the M&IE to show the days they were supposed to have traveled.*

**Instructions:** Execute the following steps:

You have been instructed to attend the OAR/ESRL sponsored annual conference in Boulder, CO on May 9<sup>th</sup> & 10<sup>th</sup>. You have decided to take 8 hours of annual leave May 11<sup>th</sup> and travel back on the 13<sup>th</sup>. Your authorization will need to include the following costs:

**Estimated Expenses**

\$425.00 = Round-trip air fare

\$25.43 = Transaction Fee

\$100 = Taxi Fare

\$50 = Hotel Tax

\$50 = Checked Baggage Fee

**Lodging/M&IE Expenses**

The estimated lodging for each night of the conference is \$104, not to exceed 115% of the maximum lodging rate for Boulder, CO as designed by the OAR/ESRL Conference allowance.

Step	Action
1	From the <b>Home</b> screen: ➤ Click <b>Create New Document</b> from the <b>Document Toolbar</b>

Step	Action
2	<p>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.</p> <p><b>New Document</b></p> <div data-bbox="285 432 1078 600"> <p> <b>Quick Tip</b>            To select a traveler, click on the VNum or Traveler Name lookup button. <a href="#">more</a></p> <p>VNum  <input type="text"/></p> <p>Traveler Name   <small>(Enter last name and click lookup.)</small></p> </div>

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2a	<p>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="285 373 1097 968"> <p><b>Enter Search Criteria</b></p> <p>VNum <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Cancel"/></p> <p><b>Search Results</b> <span style="float: right;">Click on an entry to select it</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>VNum</th> <th>Last Name</th> <th>First Name</th> <th>MI</th> </tr> </thead> <tbody> <tr><td><a href="#">0006-00001</a></td><td>Rubis</td><td>Therese</td><td>A</td></tr> <tr><td><a href="#">0006-00002</a></td><td>Davis</td><td>Karen</td><td>B</td></tr> <tr><td><a href="#">0006-00003</a></td><td>Wenther</td><td>Scott</td><td>C</td></tr> <tr><td><a href="#">0006-00004</a></td><td>Doran</td><td>Chris</td><td>D</td></tr> <tr><td><a 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<p><b>Note:</b> You can do searches on either vendor numbers or last names by typing them in the fields provided and clicking SEARCH.</p>																																																																																																																																																																									

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2b	<p>The <i>New Document</i> screen appears with your traveler's name and vendor number filled in.</p>  <p>➤ Click on the <b>Document Type</b> drop-down listing and select <b>TA</b></p> <p>➤ Click the <b>Create</b> (<i>this Document</i>) button</p>
3	<p>The <i>Document Information</i> screen appears with the <i>Document Information</i> tab highlighted and fields displaying.</p> <p>Enter the following information:</p> <ul style="list-style-type: none"> <li>➤ <b>Document Name</b> = <i>Same as TA#</i></li> <li>➤ <b>TA#</b> = <i>Use the next available one listed on your sheet</i></li> <li>➤ <b>Type Code</b> = <i>1-SINGLE-DOMESTIC</i></li> <li>➤ <b>Purpose Code</b> = <i>5-REPORTABLE CONFERENCE</i></li> <li>➤ <b>Document Description</b> = <i>Attending OAR/ESRL Annual Conference in Boulder, CO.</i></li> </ul> <p><i>Note: The name and purpose of the conference must be included in the document description field.</i></p>
4a	<p>Click on the <i>Trip Information</i> tab. If you click the <b>Create</b> button prior to clicking the tab you will receive an error message, click <b>OK</b> 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"> <li>➤ <b>Begin Travel</b> = <i>5/8/##</i></li> <li>➤ <b>Depart</b> = <i>RES</i></li> <li>➤ <b>End Travel</b> = <i>5/13/##</i></li> <li>➤ <b>Return</b> = <i>RES</i></li> <li>➤ <b>Comments</b> = <i>Annual Leave taken 5/11. Leave taken in conjunction with official travel does not affect cost of airfare.</i></li> </ul>

Step	Action
4b	<p>The values selected in the Begin &amp; End Travel dates will automatically populate in the <b>Itinerary Location</b> area. These dates must be filled in prior to filing in the <i>Itinerary Location</i> field.</p> <ul style="list-style-type: none"> <li>➤ Lookup or Enter the location (i.e. Boulder, CO)</li> <li>➤ Click the  (<i>Document</i>) button</li> </ul> <p>The <b>Document Information</b> screen still appears but the <b>Document Toolbar</b> now has different options available. It will also show your Document Name &amp; TA#.</p> <ul style="list-style-type: none"> <li>➤ Click on  in the <b>Document Toolbar</b> to bring up the <i>Edit/Enter Expenses</i> screen.</li> </ul>
5a	<p>To enter the actual lodging cost information, click on the <b>Show Expense Details</b>  icon on the first line of lodging expenses. This will bring up a new window.</p> <ul style="list-style-type: none"> <li>➤ Click the <b>Lodging Details</b> tab</li> <li>➤ Click the <b>Conference Allowance</b> checkbox</li> <li>➤ Enter <b>115%</b> in the <b>Conference%</b> field</li> <li>➤ Enter <b>OAR/ESRL Conference</b> in the <b>Conference Description</b> field</li> <li>➤ Enter <b>OAR/DOC</b> in the <b>Sponsoring Agency</b> field</li> <li>➤ Click  (<i>Expense Detail Updates</i>)</li> </ul> <div data-bbox="282 1136 1390 1640" style="border: 1px solid black; padding: 5px;"> <p><b>Expense Details for Lodging-PerDiem 05/08/2012</b></p> <div style="display: flex; justify-content: space-between;"> <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <p> <b>Quick Tip</b> 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="background-color: #d0d0d0; padding: 5px; border: 1px solid #ccc;"> <p>For this page you can:</p> <p> Expense Detail Updates</p> <p> without Saving Expense Details</p> </div> </div> <div style="display: flex; margin-top: 10px;"> <div style="background-color: #d0d0d0; padding: 5px; border: 1px solid #ccc; width: 50%;"> <p><b>General Details</b>   <b>Lodging Details</b></p> <p><input checked="" type="checkbox"/> <b>Conference Allowance</b></p> <p>Conference % <input type="text" value="115"/></p> <p>Conference Rate 125.35</p> <p>Conference Description <input type="text" value="OAR/ESRL Conference"/></p> <p>Sponsoring Agency <input type="text" value="OAR/DOC"/></p> </div> <div style="background-color: #d0d0d0; padding: 5px; border: 1px solid #ccc; width: 45%;"> <p><b>Leave Data</b></p> <p><input checked="" type="radio"/> None <span style="float: right;">Hours <input type="text" value="0.00"/></span></p> <p><input type="radio"/> Annual</p> <p><input type="radio"/> Other</p> </div> </div> <div style="display: flex; margin-top: 10px;"> <div style="background-color: #d0d0d0; padding: 5px; border: 1px solid #ccc; width: 45%;"> <p><b>Meals Provided</b></p> <p><input type="checkbox"/> Breakfast</p> <p><input type="checkbox"/> Lunch</p> <p><input type="checkbox"/> Dinner</p> </div> <div style="background-color: #d0d0d0; padding: 5px; border: 1px solid #ccc; width: 45%;"> <p><b>M&amp;E Override</b></p> <p>Quarters <input type="text"/></p> <p>M&amp;E Amount <input type="text"/></p> </div> </div> </div>
5b	<p>On the <b>Enter/Edit Expenses</b> page scroll to the right and in the same line you just added the actual expense</p> <ul style="list-style-type: none"> <li>➤ Enter <b>5/10/##</b> in the <b>Copy Through</b> field</li> <li>➤ Click the  (<i>Expense Changes</i>) button when completed</li> </ul>

Step	Action
5c	<p>To enter the annual leave information, click on the <b>Show Expense Details</b>  icon on the line of the date you will be taking annual leave. This will bring up a new window.</p> <ul style="list-style-type: none"> <li>➤ On the <i>General Details</i> tab</li> <li>➤ Enter <b>0</b> in the <b>Expense Cost</b> field</li> <li>➤ Click the <i>Lodging Details</i> tab</li> <li>➤ In the <i>M&amp;IE Override Box</i>, enter the <i>Quarter</i> (i.e. 3)</li> <li>➤ In the <i>M&amp;IE Override Box</i>, enter the <i>M&amp;IE Amount</i> (i.e. 61.00)</li> <li>➤ Click  (<i>Expense Detail Updates</i>)</li> </ul> <div data-bbox="282 653 1396 1176" style="border: 1px solid black; padding: 5px;"> <p><b>Expense Details for Lodging-PerDiem 05/11/2012</b></p> <div style="display: flex; justify-content: space-between;"> <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <p> <b>Quick Tip</b> 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="background-color: #d0d0d0; padding: 5px; border: 1px solid #ccc;"> <p>For this page you can:</p> <p><b>Use</b> Expense Detail Updates</p> <p><b>Close</b> without Saving Expense Details</p> </div> </div> <div style="display: flex; border-top: 1px solid #ccc; border-bottom: 1px solid #ccc; margin: 5px 0;"> <div style="background-color: #d0d0d0; padding: 2px 5px; border: 1px solid #ccc;">General Details</div> <div style="background-color: #4f81bd; color: white; padding: 2px 5px; border: 1px solid #ccc;">Lodging Details</div> </div> <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;"> <p><input type="checkbox"/> <b>Conference Allowance</b></p> <p>Conference % <input type="text"/></p> <p>Conference Rate 0.00</p> <p>Conference Description <input type="text"/></p> <p>Sponsoring Agency <input type="text"/></p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;"> <p><b>Leave Data</b></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="display: flex; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; width: 20%;"> <p><b>Meals Provided</b></p> <p><input type="checkbox"/> Breakfast</p> <p><input type="checkbox"/> Lunch</p> <p><input type="checkbox"/> Dinner</p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 20%;"> <p><b>M&amp;IE Override</b></p> <p>Quarters <input type="text" value="3"/></p> <p>M&amp;IE Amount <input type="text" value="61.00"/></p> </div> </div> </div> <div style="background-color: yellow; padding: 10px; margin-top: 10px;"> <p><b>Note:</b> Normally you would mark the annual leave by the <i>Leave Data</i> area, but because this is the day you should have traveled back, we're zeroing out of the lodging cost and doing <math>\frac{3}{4}</math> quarters M&amp;IE under the <i>M&amp;IE Override</i>.</p> </div>

Step	Action
5d	<p>To enter leave being taken on a weekend, click on the <b>Show Expense Details</b>  icon on the line of the date(s) you will designated “Other Leave”, so you will not receive Lodging or M&amp;IE:</p> <ul style="list-style-type: none"> <li>➤ Click the <i>Lodging Details</i> tab</li> <li>➤ Click the <i>Other</i> radio button in the <i>Leave Data area</i></li> <li>➤ Enter/Verify <b>8</b> in the <b>Hours</b> field in the <i>Leave Data area</i></li> <li>➤ Click  (<i>Expense Detail Updates</i>)</li> </ul> <div style="border: 1px solid black; padding: 5px;"> <p><b>Expense Details for Lodging-PerDiem 05/12/2012</b></p> <div style="display: flex; justify-content: space-between;"> <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <p> <b>Quick Tip</b> 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="background-color: #d0d0d0; padding: 5px; border: 1px solid #ccc;"> <p>For this page you can:</p> <p> Expense Detail Updates</p> <p> without Saving Expense Details</p> </div> </div> <div style="display: flex; margin-top: 10px;"> <div style="background-color: #d0d0d0; padding: 2px 5px; border: 1px solid #ccc; margin-right: 5px;">General Details</div> <div style="background-color: #000080; color: white; padding: 2px 5px; border: 1px solid #ccc;">Lodging Details</div> </div> <div style="display: flex; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;"> <p><input type="checkbox"/> <b>Conference Allowance</b></p> <p>Conference % <input type="text"/></p> <p>Conference Rate 0.00</p> <p>Conference Description <input type="text"/></p> <p>Sponsoring Agency <input type="text"/></p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;"> <p><b>Leave Data</b></p> <p><input type="radio"/> None      Hours <input type="text" value="8.00"/></p> <p><input type="radio"/> Annual</p> <p><input checked="" type="radio"/> Other</p> </div> </div> <div style="display: flex; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; width: 20%;"> <p><b>Meals Provided</b></p> <p><input type="checkbox"/> Breakfast</p> <p><input type="checkbox"/> Lunch</p> <p><input type="checkbox"/> Dinner</p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 20%;"> <p><b>M&amp;IE Override</b></p> <p>Quarters <input type="text"/></p> <p>M&amp;IE Amount <input type="text"/></p> </div> </div> </div>

Step	Action										
5e	<p>For the last day of your trip, which technically is leave as well, the system will automatically generate the M&amp;IE to 3/4. We need to zero that out. Click on the <b>Show Expense Details</b>  icon on the last day of the trip.</p> <ul style="list-style-type: none"> <li>➤ Click the <b>Lodging Details</b> tab</li> <li>➤ In the <i>M&amp;IE Override Box</i>, enter the <b>Quarter</b> (i.e. 1)</li> <li>➤ In the <i>M&amp;IE Override Box</i>, enter the <b>M&amp;IE Amount</b> (i.e. .01)</li> <li>➤ Click  (<i>Expense Detail Updates</i>)</li> </ul> <div style="border: 1px solid black; padding: 5px;"> <p><b>Expense Details for Lodging-PerDiem 05/13/2012</b></p> <div style="display: flex; justify-content: space-between;"> <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <p> <b>Quick Tip</b> 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="background-color: #d0d0d0; padding: 5px; border: 1px solid #ccc;"> <p>For this page you can:</p> <p> Expense Detail Updates</p> <p> without Saving Expense Details</p> </div> </div> <div style="display: flex; border-top: 1px solid #ccc; border-bottom: 1px solid #ccc;"> <div style="background-color: #d0d0d0; padding: 2px 5px; border: 1px solid #ccc;">General Details</div> <div style="background-color: #d0d0d0; padding: 2px 5px; border: 1px solid #ccc; border-bottom: none;">Lodging Details</div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;"> <p><input type="checkbox"/> <b>Conference Allowance</b></p> <p>Conference % <input type="text"/></p> <p>Conference Rate 0.00</p> <p>Conference Description <input type="text"/></p> <p>Sponsoring Agency <input type="text"/></p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;"> <p><b>Leave Data</b></p> <p><input checked="" type="radio"/> None <span style="float: right;">Hours <input type="text" value="0.00"/></span></p> <p><input type="radio"/> Annual</p> <p><input type="radio"/> Other</p> </div> </div> <div style="display: flex; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; width: 20%;"> <p><b>Meals Provided</b></p> <p><input type="checkbox"/> Breakfast</p> <p><input type="checkbox"/> Lunch</p> <p><input type="checkbox"/> Dinner</p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 30%; margin-left: 10px;"> <p><b>M&amp;IE Override</b></p> <p>Quarters <input type="text" value="1"/></p> <p>M&amp;IE Amount <input type="text" value="0.01"/></p> </div> </div> </div> <ul style="list-style-type: none"> <li>➤ Click the  (<i>Expense Changes</i>) button when completed</li> </ul> <div style="background-color: yellow; padding: 5px; border: 1px solid black; margin-top: 10px;"> <p><b>Note:</b> Upon saving your data, your lodging and M&amp;IE amounts for the days modifying, should be now correct.</p> </div>										
5f	<p>Enter the rest of the information on the <b>Edit/Enter Expenses</b> screen:</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">Airline Flight Traveler</td> <td style="padding: 5px; text-align: right;">\$425.00 (Class = Y)</td> </tr> <tr> <td style="padding: 5px;">TMC Transaction Fee</td> <td style="padding: 5px; text-align: right;">\$25.43</td> </tr> <tr> <td style="padding: 5px;">Hotel Tax</td> <td style="padding: 5px; text-align: right;">\$50.00</td> </tr> <tr> <td style="padding: 5px;">Taxi</td> <td style="padding: 5px; text-align: right;">\$100.00</td> </tr> <tr> <td style="padding: 5px;">Check Baggage Fee</td> <td style="padding: 5px; text-align: right;">\$50.00</td> </tr> </table> <ul style="list-style-type: none"> <li>➤ Click the  (<i>Expense Changes</i>) button when completed</li> </ul>	Airline Flight Traveler	\$425.00 (Class = Y)	TMC Transaction Fee	\$25.43	Hotel Tax	\$50.00	Taxi	\$100.00	Check Baggage Fee	\$50.00
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Step	Action																																																			
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>																																																			
7	<p>Click on <b>Totals</b> in the <i>Document Toolbar</i> to open up the <i>Total Details</i> screen</p> <ul style="list-style-type: none"> <li>➤ Verify the totals</li> </ul>																																																			
8	<p>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.</p>																																																			
9	<p>Click on <b>Perform Pre-Audits</b> in the <i>Document Toolbar</i> to open up the <i>Pre-Audit Results</i> screen.</p> <div style="border: 1px solid black; padding: 5px;"> <p><b>Pre-Audit Results for 2DABS0026</b></p> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="background-color: #fce4ec; padding: 5px;"> <p><b>Quick Tip</b> Click the Magnifying Glass icon to view detail comments for each audit process. <a href="#">more</a></p> </div> <div style="border: 1px solid #ccc; padding: 2px;"> <p>For this Document you can: <b>Close</b> Pre-Audit Results</p> </div> </div> <p>Document Name: 2DABS0026 Type: TA Traveler: Bak, Darren Status: FAIL</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #003366; color: white;"> <th colspan="3">Pre-Audit Results</th> </tr> <tr style="background-color: #cccccc;"> <th>Audit Process</th> <th>Status</th> <th>Comments</th> </tr> </thead> <tbody> <tr><td><input type="checkbox"/> ACCOUNT VALIDATION</td><td>PASS</td><td></td></tr> <tr><td><input type="checkbox"/> AMENDMENTS</td><td>PASS</td><td></td></tr> <tr><td><input type="checkbox"/> AMOUNT PAID TO TRAVELER</td><td>PASS</td><td></td></tr> <tr><td><input type="checkbox"/> APPROVAL BY TRAVELER</td><td>PASS</td><td></td></tr> <tr><td><input type="checkbox"/> DOC Amend to \$0</td><td>PASS</td><td></td></tr> <tr><td><input type="checkbox"/> DOC CONFERENCE VALIDATION</td><td>FAIL</td><td>You must complete the Conference Criteria in the additional information screen (at least one YES response is expected for conferences).</td></tr> <tr><td><input type="checkbox"/> DOC FY END PROCESSING</td><td>PASS</td><td></td></tr> <tr><td><input type="checkbox"/> DOC MILEAGE VALIDATION</td><td>PASS</td><td></td></tr> <tr><td><input type="checkbox"/> DOC PAA AD-HOC EXPENSES</td><td>PASS</td><td></td></tr> <tr><td><input type="checkbox"/> DOC PAA DOCUMENT NAME</td><td>PASS</td><td></td></tr> <tr><td><input type="checkbox"/> DOC PAA FOREIGN HOTEL TAX</td><td>PASS</td><td></td></tr> <tr><td><input type="checkbox"/> DOC PAA LAUNDRY CONUS</td><td>PASS</td><td></td></tr> <tr><td><input type="checkbox"/> DOC PAA LAUNDRY FOREIGN</td><td>PASS</td><td></td></tr> <tr><td><input type="checkbox"/> DOC PAA LAUNDRY 0C-NON</td><td>PASS</td><td></td></tr> <tr><td><input type="checkbox"/> DOC PAA TICKET CLASS</td><td>PASS</td><td></td></tr> </tbody> </table> <p style="background-color: yellow; padding: 5px;"><b>Note:</b> The system will fail your results if the Conference screen has not been filled out. The Conference screen must be filled out if using 5-Reportable Conference or 6-Non-Reportable Conference selections for the purpose of the trip.</p> </div>	Pre-Audit Results			Audit Process	Status	Comments	<input type="checkbox"/> ACCOUNT VALIDATION	PASS		<input type="checkbox"/> AMENDMENTS	PASS		<input type="checkbox"/> AMOUNT PAID TO TRAVELER	PASS		<input type="checkbox"/> APPROVAL BY TRAVELER	PASS		<input type="checkbox"/> DOC Amend to \$0	PASS		<input type="checkbox"/> DOC CONFERENCE VALIDATION	FAIL	You must complete the Conference Criteria in the additional information screen (at least one YES response is expected for conferences).	<input type="checkbox"/> DOC FY END PROCESSING	PASS		<input type="checkbox"/> DOC MILEAGE VALIDATION	PASS		<input type="checkbox"/> DOC PAA AD-HOC EXPENSES	PASS		<input type="checkbox"/> DOC PAA DOCUMENT NAME	PASS		<input type="checkbox"/> DOC PAA FOREIGN HOTEL TAX	PASS		<input type="checkbox"/> DOC PAA LAUNDRY CONUS	PASS		<input type="checkbox"/> DOC PAA LAUNDRY FOREIGN	PASS		<input type="checkbox"/> DOC PAA LAUNDRY 0C-NON	PASS		<input type="checkbox"/> DOC PAA TICKET CLASS	PASS	
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Step	Action
10	<p>Click on <b>DOC Conference</b> in the <i>Document Toolbar</i> to open up the <i>DOC Conference</i> screen.</p> <div data-bbox="284 384 1417 863"> <p><b>DOC Conference</b></p> <div style="border: 1px solid black; padding: 5px;"> <p><b>Quick Tip</b>   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="float: right; border: 1px solid black; padding: 5px; margin-top: 5px;"> <p>For this Page you can:</p> <p><b>Save</b> DOC Additional Information Updates</p> <p><b>Clear</b> Updates</p> </div> <p><b>Criteria for Determining Purpose Code for Conferences and Training</b></p> <ol style="list-style-type: none"> <li>1. Does the Conference have a featured or keynote speaker from the Department of Commerce or any of its bureaus? <input type="text"/></li> <li>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"/></li> <li>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"/></li> <li>4. Is the Department of Commerce or any of its bureaus providing direct funding towards the conference? <input type="text"/></li> <li>5. Does the conference include internal DOC related Workshops? <input type="text"/></li> <li>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"/></li> <li>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"/></li> </ol> </div> <p><b>Note:</b> At least one field must be filled in with a YES. Multiple fields can have YES answers. Depending upon your answer to the questions, the system will determine whether or not if the purpose chosen was correct. If it is not, the system will automatically change the purpose type to the correct one based on your answer(s).</p>
10a	<p>Enter the following:</p> <ol style="list-style-type: none"> <li>1. YES</li> <li>2. YES</li> <li>3. YES</li> </ol> <p>➤ Click <b>Save</b> (<i>DOC Additional Information Updates</i>)</p>
11	<p>Click on <b>Perform Pre-Audits</b> in the <i>Document Toolbar</i> to open up the <i>Pre-Audit Results</i> screen.</p> <p>➤ Verify the document now has a status of PASS</p>

Step	Action
12	<p>Finish the process with your TA:</p> <ul style="list-style-type: none"><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>

**AWAIT TRAINER TO APPROVE ALL DOCUMENTS BEFORE CONTINUING WITH THE NEXT EXERCISE.**