

Working Offline

Using Internet Explorer

CalATERS is a web-based system that accesses the application server at the Teale Data Center. Users access CalATERS via the internet/intranet to create Travel Advance or Expense Reimbursement requests for submission to the approval process. Users may also create these forms "offline" via a laptop not connected to the internet/intranet, then connect to the internet/intranet at a later time to submit the form for approval.

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I. Setting Up Your Laptop to Work Offline

In order to work offline your laptop will require adding CalATERS to the desktop. Once added to the desk top, if changes are made to your Profile or to the CalATERS program or rules, you will need to replace the old offline CalATERS icon (see section VI. **Changing/Updating Offline User on the Laptop**).

The following steps provide instructions for setting up your laptop.

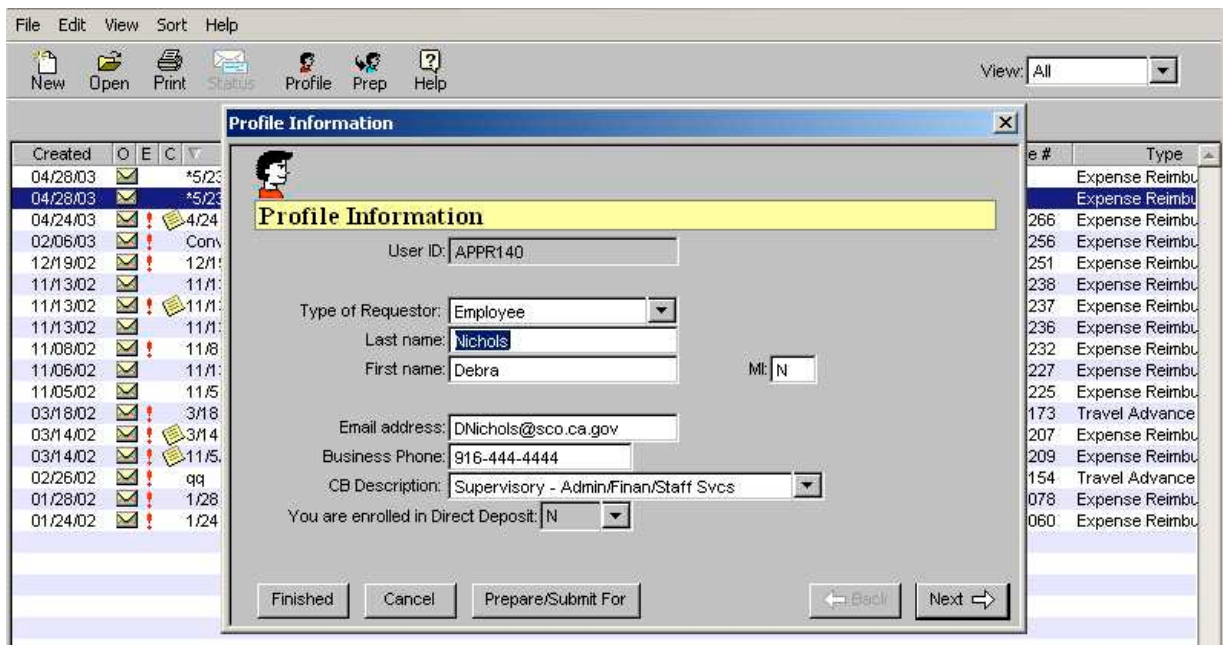
Step 1

Access CalATERS from your internet/intranet and sign in.



Step 2

Verify and update the information on your Profile. Information on the Profile must be correct before working offline.



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I. Setting Up Your Laptop to Work Offline (continued)

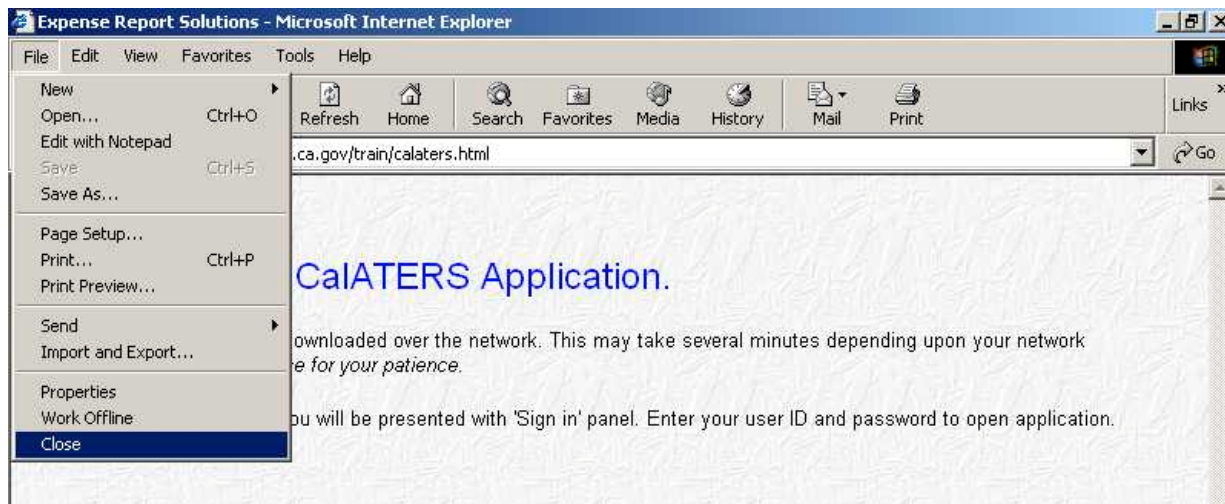
Step 3

Exit the Work Queue.



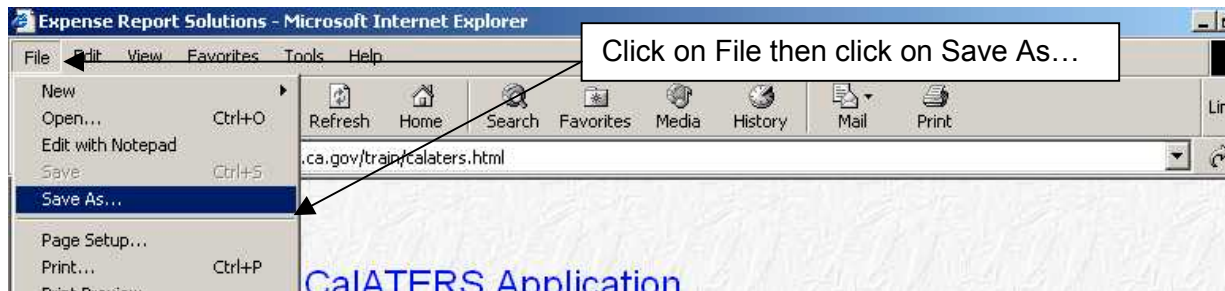
Step 4

Close your browser.



Step 5

Re-open your Internet browser and access CalATERS again ignore the Sign In screen. Click **FILE** on the Menu Bar then click on SAVE AS.

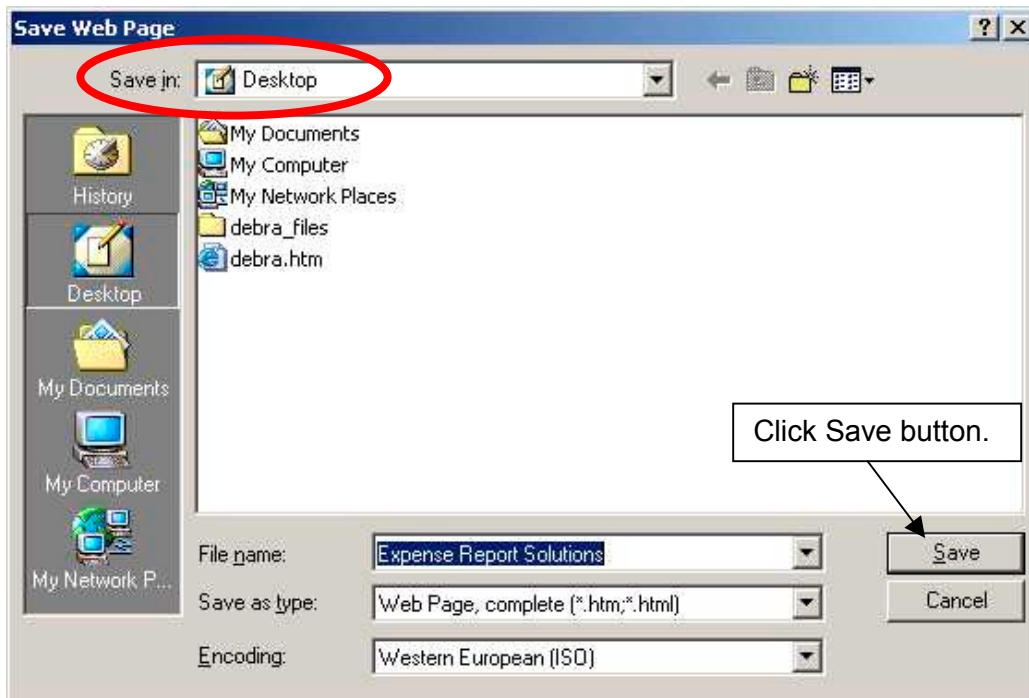


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I. Setting Up Your Laptop to Work Offline (continued)

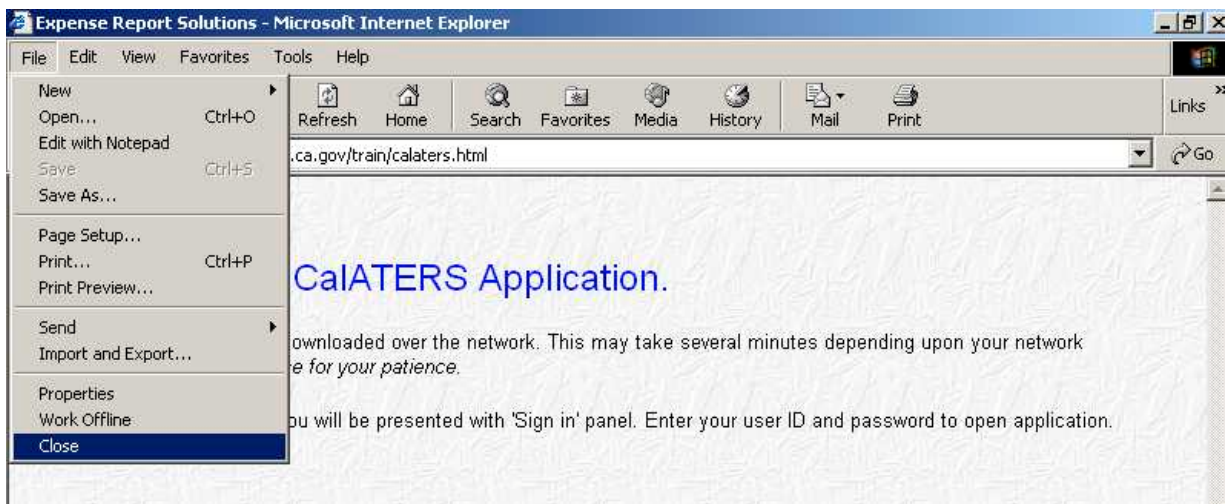
Step 6

Your Save As screen may look different than the example below. Click on the appropriate field to save the web page to your Desktop, then click on the Save button.



Step 7

Close your browser.

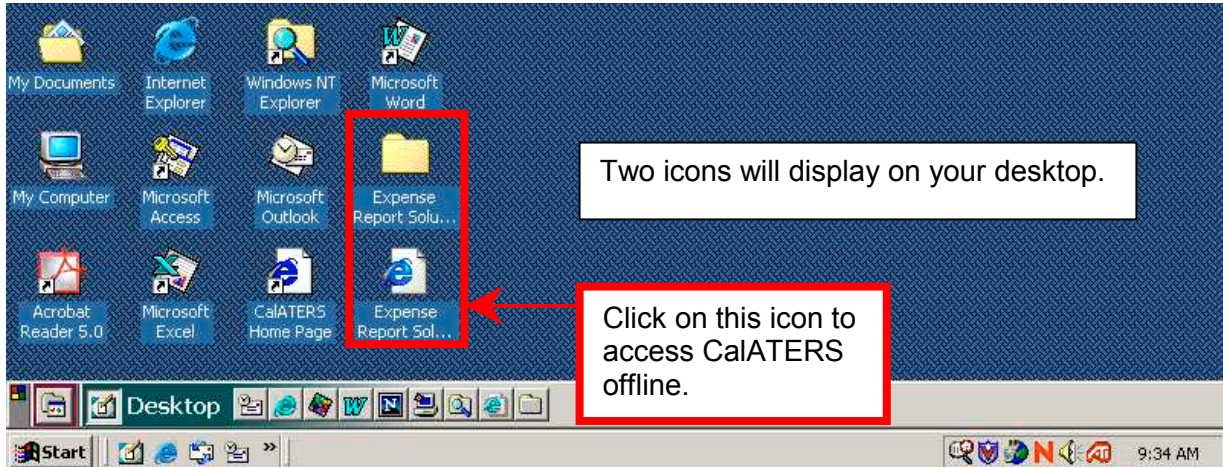


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I. **Setting Up Your Laptop to Work Offline** (continued)

Step 8

After saving the web page two icons will display on your desktop. Clicking on the icon indicated below will allow you access to key offline Travel Advances and Expense Reimbursements.

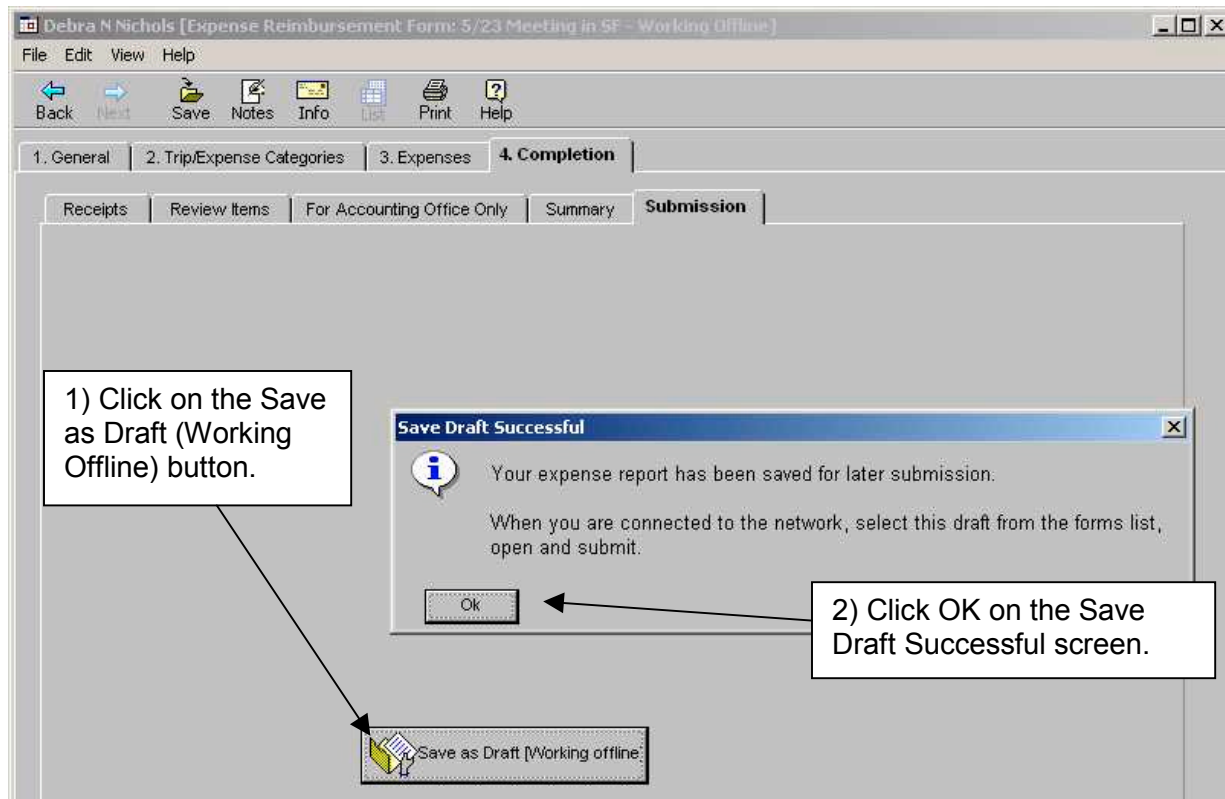


II. Creating an Offline Travel Advance or Expense Reimbursement

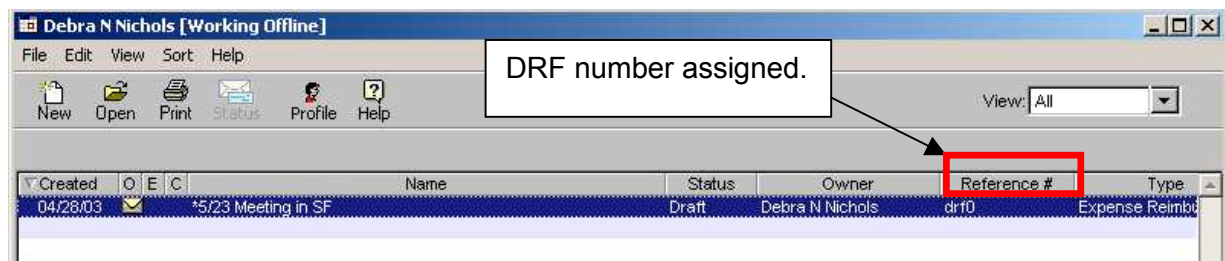
Procedures for creating a Travel Advance or Expense Reimbursement form offline and online are similar. Procedures that are different when keying offline will be explained in this and the following sections. General instructions for creating Travel Advance and Expense Reimbursement a can be found on the CalATERS website.

Forms created offline cannot be submitted for approval offline (see section IV. **Submitting Offline Forms for Approval**).

Create the form using the general instructions provided on the CalATERS website. Once all information is keyed, save the form.



Once a form is created and closed it appears on the Work Queue with a "drf" number assigned in the **Reference #** field instead of a TEA or TAF form number.



III. Offline Restrictions

There are several restrictions when working offline:

- 1) Work Queue will only display Travel Advances or Expense Reimbursements created offline. All other forms will not be displayed and cannot be accessed offline.
- 2) Forms created offline will only display on the laptop/computer on which it was created (i.e., form is created on laptop, cannot access the form from a different laptop or PC. Form must be accessed from the same laptop).
- 3) Approvers cannot approve forms offline.
- 4) Forms cannot be created as a submitter or preparer for other employees.
- 5) Only one user per laptop can work offline. (See instructions section **VI. Changing Offline User on the Laptop**).
- 6) Profile information can be viewed but cannot be changed offline.
- 7) Cancel, Delete, Renotify Approver, Form Archive Retrieval are not available when working offline.
- 8) See section **IV. Working with Forms Created Offline**.

The screenshot shows a software window titled "Debra N Nichols [Working Offline]". The window has a menu bar with "File", "Edit", "View", "Sort", and "Help". Below the menu bar is a toolbar with icons for "New", "Open", "Print", "Status", "Profile", and "Help". A callout box points to the window title bar, stating "The heading identifies that the form is being created offline." The main content area displays a "Profile Information" form. A callout box points to the heading "1. Create your Profile Information", stating "Profile information cannot be updated offline." The form contains the following fields:

- User ID: APPR140 (examples: TBear or TobyB or malons)
- Type of Requestor: Employee (dropdown)
- Last name: Nichols
- First name: Debra
- MI: N
- Email address: DNichols@sco.ca.gov
- Business Phone: 916-444-4444
- CB Description: Supervisory - Admin/Finan/Staff Svcs (dropdown)
- You are enrolled in Direct Deposit: N (dropdown)

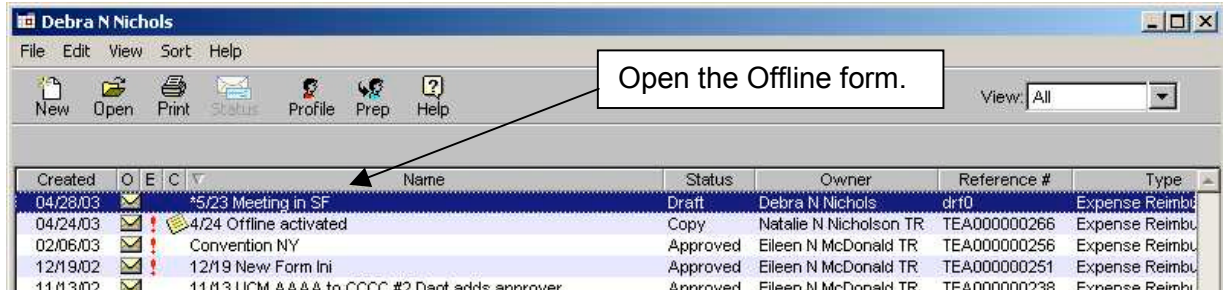
Buttons at the bottom include "Finished", "Cancel", "Back", and "Next".

IV. Submitting Offline Forms for Approval

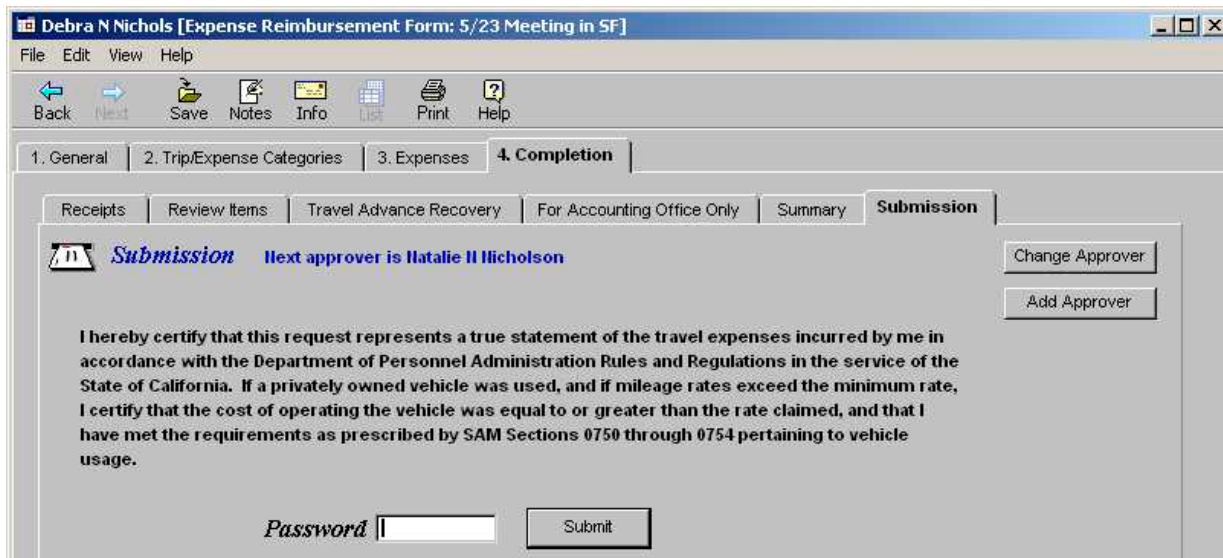
Forms created offline cannot be submitted to your approver while offline.

To submit the offline form to your approver:

- 1) Use the laptop on which the form was created.
- 2) Access CalATERS though the internet/intranet and sign in.
- 3) Offline form will have a **Status** of "Draft" and have a **Reference #** starting with **DRF**.
- 4) Open the Offline form.



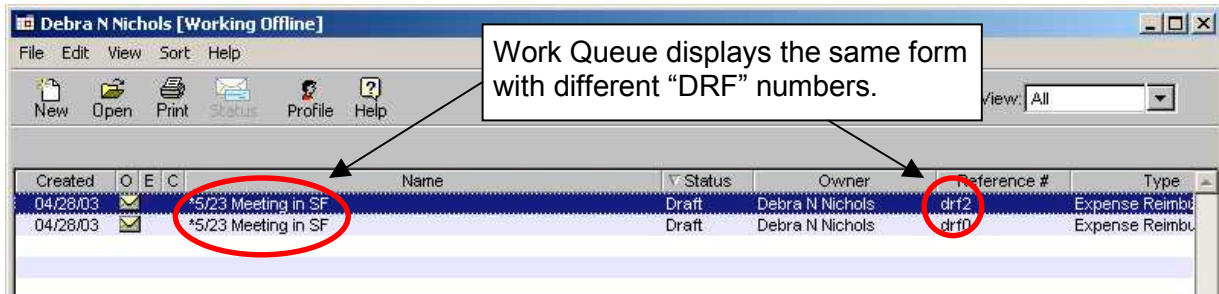
- 5) Once the form is opened, changes can be made to the form prior to submitting for approval.
- 6) Click on the Submission tab and submit the form to the approver.



V. Working with Forms Created Offline

When working on a form Offline, it is best to create the entire form in one session. When a form is only partially created and saved, re-entering and saving the form will create a second form on the Work Queue.

Sample below shows two forms drf10 and drf12. Employee created then saved drf10. Employee then reopened drf10, then saved the form again. A new drf form was created.

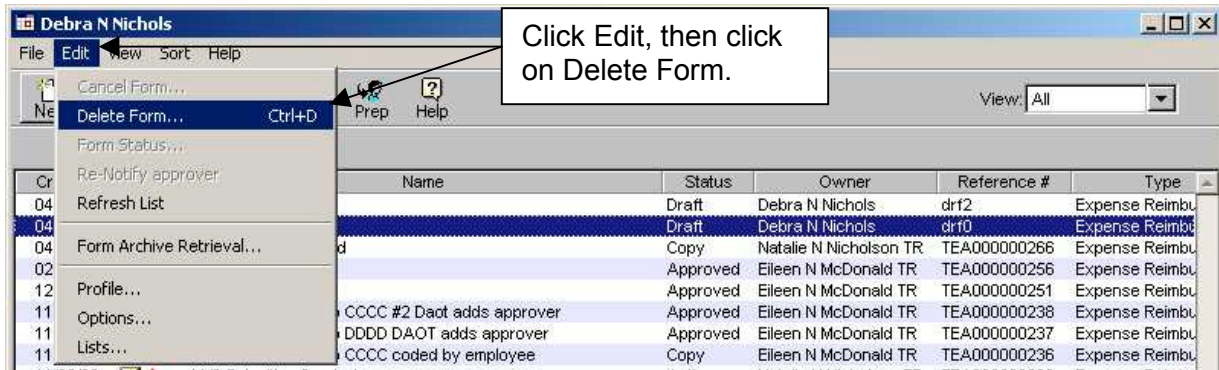


This second form will remain on the Work Queue until it is deleted. Forms CANNOT be deleted while working offline.

Caution: Once online, before deleting the form, verify that the latest version of the form is not being deleted.

To delete the form:

- 1) Use the laptop on which the form was created.
- 2) Access CalATERS though the internet/intranet and sign in.
- 3) Highlight the drf form you wish to delete (single click on the form).
- 4) From the Menu Bar, click on Edit then click on Delete Form.



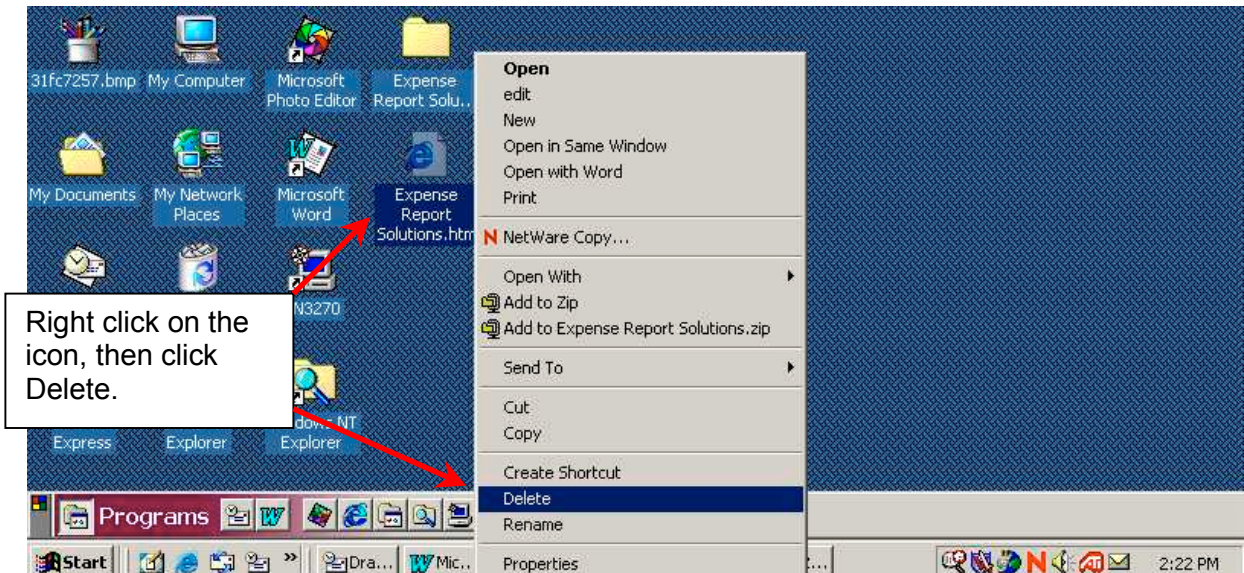
VI. Changing /Updating Offline User on the Laptop

The laptop can only accommodate one offline user at a time and once the icon is added to the desk top, if changes are made to your Profile or to the CalATERS program or rules, you will need to replace the old offline CalATERS icon.

To change to a different user or update your offline information, complete the following steps.

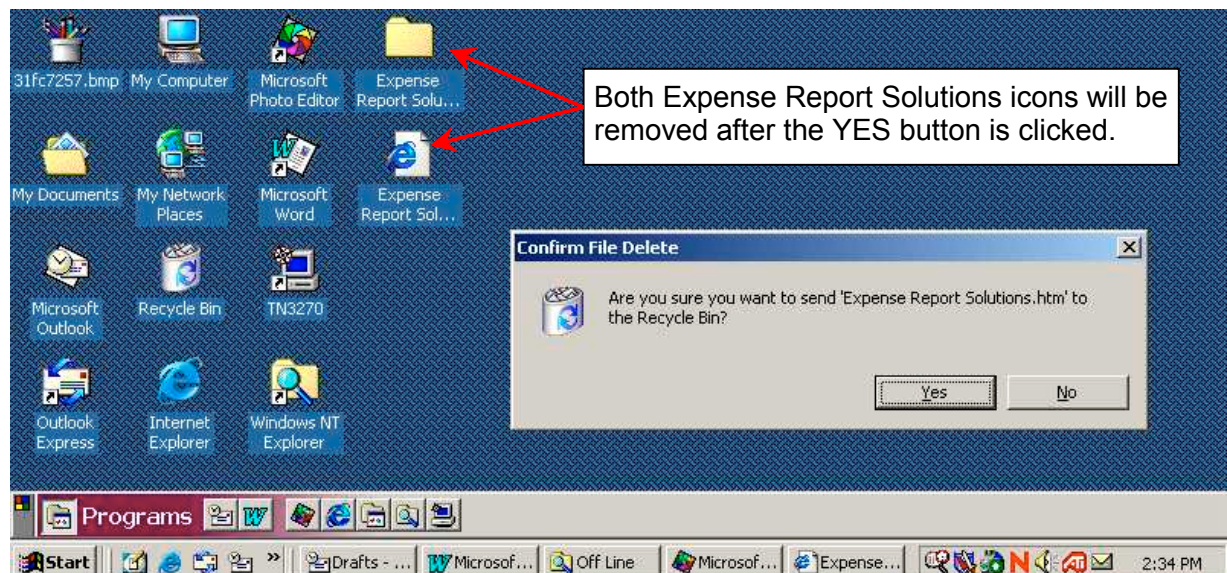
Step 1

From the Desktop of the laptop, right click on the  icon. Click on **Delete**.



Step 2

Click on  to confirm delete action. Both CalATERS icons will be removed.



To add the new user for offline access, follow the procedures in section I. **Setting Up Your Laptop to Work Offline.**