# 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.

| Pr                     | ofile Information                                    | 1          |                |
|------------------------|--|------------|----------------|
| Created OECV           |  | e#         | Туре           |
| 04/28/03 🗹 *5/23       |  | -          | Expense Reimbu |
| 04/28/03 🗹 *5/23       |  | Concerner. | Expense Reimbu |
| 04/24/03 🛛 🖬 🖠 🍥 4/24  | Profile Information                                  | 266        | Expense Reimbu |
| 02/06/03 🗹 ! Conv      | Ilser ID: ADDR140                                    | 256        | Expense Reimbu |
| 12/19/02 🗹 ! 12/1:     | Soor D. AFFRIdo                                      | 251        | Expense Reimbu |
| 11/13/02 🖂 11/1:       |  | 238        | Expense Reimbu |
| 11/13/02 🛛 🖬 🌻 🍥 11/1: | Type of Requestor: Employee                          | 237        | Expense Reimbu |
| 11/13/02 🖂 11/1:       |  | 236        | Expense Reimbu |
| 11/08/02 🗹 ! 11/8      |  | 232        | Expense Reimbu |
| 11/06/02 🖂 11/1:       | First name: Debra MI: N                              | 227        | Expense Reimbu |
| 11/05/02 🔛 11/5        |  | 225        | Expense Reimbu |
| 03/18/02 🔛 ! 3/18      | En situatives Patiente Constant                      | 173        | Travel Advance |
| 03/14/02 🛛 🖞 🥺 3/14    | Email address. Unichois@sco.ca.gov                   | 207        | Expense Reimbu |
| 03/14/02 🛛 💆 🖞 🍥 11/5. | Business Phone: 916-444-4444                         | 209        | Expense Reimbu |
| 02/26/02 🗹 ! qq        | CB Description: Supervisory - Admin/Finan/Staff Sycs | 154        | Travel Advance |
| 01/28/02 🔛 1/28        |  | 078        | Expense Reimbu |
| 01/24/02 🗹 ! 1/24      | You are enrolled in Direct Deposit: N                | 060        | Expense Reimbu |

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

# <u>Step 3</u>

Exit the Work Queue.

| 💷 Debra N N  | ichols           |                   |           |                |                        |              | _O×            |
|--------------|------------------|-------------------|-----------|----------------|------------------------|--------------|----------------|
| File Edit Vi | ew Sort He       | lp 🛛              |           |                |                        |              |                |
| New<br>Open  | Ctrl+N<br>Ctrl+O | us Profile P      | Prep Help | Click on Exit. |                        | View: All    |                |
| Print        | Ctrl+P           |                   |           |                | 1.0                    | 100          |                |
| 11000        |                  |                   | Name      | Status         | Owner                  | Reference #  | Туре 🔺         |
| Exit         |                  | Cated Offline TA  | \#1       | Submitted      | Debie N Nichols TR     | TAF000000288 | Travel Advance |
| 04/24/03     | M 🚺 🎯 4/24 0     | Offline activated |           | Сору           | Natalie N Nicholson TR | TEA000000266 | Expense Reimbu |
| 04/21/03     | 4/21 /           | Approver          |           | Approved       | Ronald N Nicholson TR  | TEA000000260 | Expense Reimbu |
| 04/21/03     | 4/21-            | Approver          |           | Approved       | Fleanor N Payne TR     | TEA00000261  | Expense Reimbu |

### <u>Step 4</u>

Close your browser.

| New<br>Open Ctrl+O   | ר בו בעיר איז   | Links |
|--|---|-------|
| Edit with Notepad  | .ca.gov/train/calaters.html   | • @Ga |
| Save As  |   |       |
| Print Ctrl+P   | CalATERS Application.   |       |
| Print Preview  |   |       |
| Print Preview<br>Send<br>Import and Export                               | ownloaded over the network. This may take several minutes depending upon your network                             |       |
| Print Preview<br>Send<br>Import and Export<br>Properties                 | ownloaded over the network. This may take several minutes depending upon your network <i>e for your patience.</i> |       |
| Print Preview<br>Send<br>Import and Export<br>Properties<br>Work Offline | ownloaded over the network. This may take several minutes depending upon your network <i>e for your patience.</i> |       |

# <u>Step 5</u>

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

| File <b>4</b> dit View F  | avorites T | iools Help  |                 |          | Clic     | k on        | File the     | n click             | on Save    | e As |   |
|---------------------------|------------|-------------|-----------------|----------|----------|-------------|--------------|---------------------|------------|------|---|
| New<br>Open               | Ctrl+0     | Refresh     | ය<br>Home       | Search F | avorites | ()<br>Media | 3<br>History | Ba <b>∙</b><br>Mail | 🎒<br>Print |      |   |
| Edit with Notepad<br>Save | Ctrl+S     | .ca.gov/tra | ain/calaters.hl | tml      |          |             |              |                     |            |      | • |
| Save As                   |            |             |                 |          |          |             |              |                     |            |      |   |
| Page Setup<br>Print       | Ctrl+P     | CalA        | TERS            | App      | licatio  | on          |              |                     |            |      |   |

Continued on next page

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

# <u>Step 6</u>

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.

| Save Web Page                                 |   |                                   |            | ? ×     |
|---|---|-----------------------------------|------------|---------|
| Save jn:                                      | 🚮 Desktop   |                                   | + 🖿 😽 🎟 +  |         |
| History<br>History<br>Desktop<br>My Documents | My Document<br>My Computer<br>My Network P<br>debra_files | s<br>laces                        | Click Save | button. |
| My Computer                                   | File name:  | Expense Report Solutions          | <b>T</b>   | Save    |
| My Network P                                  | Save as <u>t</u> ype:                                     | Web Page, complete (*.htm;*.html) |            | Cancel  |
|   | <u>E</u> ncoding:   | Western European (ISO)            | <u>.</u>   |         |

# <u>Step 7</u>

Close your browser.

| File Edit View Favorites I                | ools Help  | -     |
|---|--|-------|
| New  Open  Ctrl+O                         | Image: Contract of the second sec | Links |
| Edit with Notepad                         | .ca.gov/train/calaters.html  | ∂G0   |
| Save As                                   |  | X     |
| Print Ctrl+P<br>Print Preview             | CalATERS Application.  |       |
| <b>C</b> 1                                | numinaded over the network. This may take several minutes depending upon your network  |       |
| Import and Export                         | o for a set of the network. This may take set of a finite subject and a point year network   |       |
| Import and Export                         | e for your patience.   |       |
| Import and Export Properties Work Offline | pu will be presented with 'Sign in' panel. Enter your user ID and password to open application.  |       |

Continued on next page

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

### <u>Step 8</u>

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.

| 🖬 Debra N Nichols [Working Offline]   |                       |                             |
|---|-----------------------|-----------------------------|
| File Edit View Sort Help  | DRF number assigned   |                             |
| The set of | Divi number assigned. | View: All                   |
|   |                       |                             |
| Created O E C Name  | Status                | Owner Reference # Type 🔺    |
| 04/28/03 🖂 *5/23 Meeting in SF  | Draft Debra N         | Nichols drf0 Expense Reimbo |
|   |                       |                             |
|   |                       |                             |

## 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.

| 🛄 Debra N Nichols [W | orking Offline]   |  |                       |  | <u>-</u> □×       |
|----------------------|---|--|-----------------------|--|-------------------|
| New Open Prot        | Status Profile Help   | The heading identifie  | es that the doffline. | View: All                                |                   |
| ∇ Created O E C      | Name  | Status   | Owner                 | Reference #                              | Туре 🔺            |
|                      | Profile Information   |  |                       | ×  |                   |
| -                    | L. Create your Pro  | o <mark>file Information</mark><br>PPR140<br>:xamples: TBear or TobyB or malons)           |                       | Profile infor<br>cannot be u<br>offline. | mation<br>updated |
|                      | Type of Requestor: E<br>Last name: N<br>First name: D                                   | imployee 💽<br>lichols<br>lebra   | MI: N                 |  |                   |
|                      | Email address: D<br>Business Phone: 9<br>CB Description: S<br>You are enrolled in Direc | Nichols@sco.ca.gov<br>16-444-4444<br>supervisory - Admin/Finan/Staff Svcs<br>ct Deposit: N |                       |  |                   |
|                      | Finished Cancel   |  | Con Bank              | Next 🖒                                   |                   |

# IV. Submitting Offline Forms for Approval

Forms created offline <u>cannot</u> 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.

| Debra N   | Nichols       |   |   |        |            |   |  |   |  |
|---|---------------|---|---|--------|------------|---|--|---|--|
| le Edit \   | View So       | ort Help  |   |        |            |   |  | 7   |  |
| New Op  | 🗃 🧉<br>Den Pr | nt Status   | 2<br>Profile                              | Prep H | ?)<br>Jelp | Open the  | Offline form.  | View: All   | •  |
|   |               |   |   |        |            |   |  |   |  |
| Augustant   |               | N ar  |   | A 11   | -          | Otation   |  | Determined  | Ture   |
| Created   | OEO           | -<br>-  |   | Nan    | ne         | Status  | Owner  | Reference #   | Туре   |
| Created<br>04/28/03                                     | 0 E (         | > √<br>*5/23 Meeti  | ng in SF                                  | Nan    | ne         | Status<br>Draft                                 | Owner<br>Debra N Nichols   | Reference #<br>drf0   | Type<br>Expense Reimb  |
| Created<br>04/28/03<br>04/24/03                         |               | ><br>*5/23 Meeti<br>>4/24 Offline                         | ng in SF<br>activated                     | Nan    | ne         | Status<br>Draft<br>Copy                         | Owner<br>Debra N Nichols<br>Natalie N Nicholson TR   | Reference #<br>drf0<br>TEA000000266                                 | Type<br>Expense Reimb<br>Expense Reimb                                   |
| Created<br>14/28/03<br>14/24/03<br>12/06/03             |               | 5/23 Meetin<br>5/23 Meetin<br>↓4/24 Offline<br>Convention | ng in SF<br>activated<br>NY               | Nan    | ne         | Status<br>Draft<br>Copy<br>Approved             | Owner<br>Debra N Nichols<br>Natalie N Nicholson TR<br>Eileen N McDonald TR                         | Reference #<br>drf0<br>TEA000000266<br>TEA000000256                 | Type<br>Expense Reimb<br>Expense Reimb<br>Expense Reimb                  |
| Created<br>14/28/03<br>04/24/03<br>02/06/03<br>12/19/02 |               | *5/23 Meeti<br>4/24 Offline<br>Convention<br>12/19 New    | ng in SF<br>e activated<br>NY<br>Form Ini | Nan    | ne         | Status<br>Draft<br>Copy<br>Approved<br>Approved | Owner<br>Debra N Nichols<br>Natalie N Nicholson TR<br>Eileen N McDonald TR<br>Eileen N McDonald TR | Reference #<br>drf0<br>TEA000000266<br>TEA000000256<br>TEA000000251 | Type<br>Expense Reimb<br>Expense Reimb<br>Expense Reimb<br>Expense Reimb |

- 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.

| e Edit View   | Help   |   | Abdalahmidi, Amhirang, A  |   |   |                 |
|---|--|---|---|---|---|-----------------|
| (⊐ →<br>lack  | Save Notes   | Info Print Help   | )   |   |   |                 |
| General   | 2. Trip/Expense Cate   | egories   3. Expenses   4   | . Completion  |   |   |                 |
| Receipts  | Review Items   | Travel Advance Recovery   | For Accounting Office Only  | Summary   | Submission  |                 |
| TT Sul  | mission Hex  | ct approver is Natalie II Nic   | holson  |   |   | Change Approver |
|   |  |   |   |   |   | Add Approver    |
| I hereby<br>accorda<br>State of<br>I certify<br>have me<br>usage. | / certify that this r<br>nce with the Depa<br>California. If a pri<br>that the cost of oj<br>et the requiremen | equest represents a true<br>irtment of Personnel Adm<br>ivately owned vehicle was<br>perating the vehicle was o<br>its as prescribed by SAM | statement of the travel exper<br>inistration Rules and Regulati<br>s used, and if mileage rates ex<br>equal to or greater than the rat<br>Sections 0750 through 0754 pe | ises incurred<br>ons in the se<br>ceed the min<br>te claimed, an<br>ertaining to ve | l by me in<br>rvice of the<br>imum rate,<br>id that l<br>shicle |                 |
|   |  |   |   |   |   |                 |

## 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.

| 🚾 Debra N Nichols [Working Offline] |                      |                      |                  |
|-------------------------------------|----------------------|----------------------|------------------|
| File Edit View Sort Help            | Work Queue displa    | ys the same form     |                  |
| New Open Print State Profile Help   | with different "DRF" | ' numbers.           | √iew:∏All 💽      |
|                                     |                      |                      |                  |
| Created OEC Name                    | V Status             | Owner 📥              | eference # Type  |
| 04/28/03 🔛 *5/23 Meeting in SF      | Draft                | Debra N Nichols drf: | 2 Expense Reimbu |
| 04/28/03 🖂 *5/23 Meeting in SF      | Draft                | Debra N Nichols drf  | Expense Reimbu   |
|                                     |                      |                      |                  |

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.

| 🖬 De | bra N Nichols          |                           | Click Edit then click |                        |              | _ 🗆 ×          |
|------|------------------------|---------------------------|-----------------------|------------------------|--------------|----------------|
| File | Edit New Sort Help     |                           | Delete Form           |                        |              |                |
| 70   | Cancel Form            |                           | Delete Form.          |                        | Manuel 01    |                |
| Ne   | Delete Form Ctrl+D     | Prep Help                 |                       |                        | view.] All   |                |
|      | Form Status            |                           |                       |                        |              |                |
| Cr   | Re-Notify approver     | Name                      | Status                | Owner                  | Reference #  | Түре 🔺         |
| 04   | Refresh List           |                           | Draft                 | Debra N Nichols        | drf2         | Expense Reimbu |
| 04   |                        |                           | Draft                 | Debra N Nichols        | drf0         | Expense Reimbu |
| 04   | Form Archive Retrieval | d                         | Сору                  | Natalie N Nicholson TR | TEA000000266 | Expense Reimbu |
| 02   |                        | -                         | Approved              | Eileen N McDonald TR   | TEA000000256 | Expense Reimbu |
| 12   | Profile                |                           | Approved              | Eileen N McDonald TR   | TEA000000251 | Expense Reimbu |
| 11   | Options                | CCCC #2 Daot adds approve | r Approved            | Eileen N McDonald TR   | TEA000000238 | Expense Reimbu |
| 11   | opeonsin               | DDDD DAOT adds approver   | Approved              | Eileen N McDonald TR   | TEA000000237 | Expense Reimbu |
| 11_  | Lists                  | CCCC coded by employee    | Сору                  | Eileen N McDonald TR   | TEA000000236 | Expense Reimbu |

# 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 solutions.htm icon. Click on **Delete**.



### Step 2

Click on

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

| 31fc7257.bmp My Computer        | Microsoft<br>Photo Editor<br>Microsoft<br>Microsoft<br>Word<br>Expense<br>Report Solu | Both Expense Report Solutions icons will be removed after the YES button is clicked. |  |  |  |  |  |  |
|---------------------------------|---|--|--|--|--|--|--|--|
| Microsoft<br>Outlook<br>Quthook | TIN3270   | Confirm File Delete  |  |  |  |  |  |  |
| Express Explorer Explorer       |   |  |  |  |  |  |  |  |

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