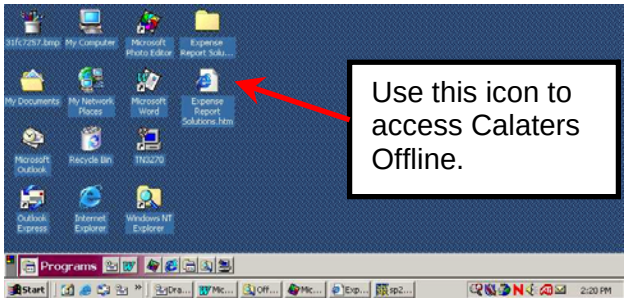
# Working Offline

## Using Internet Explorer

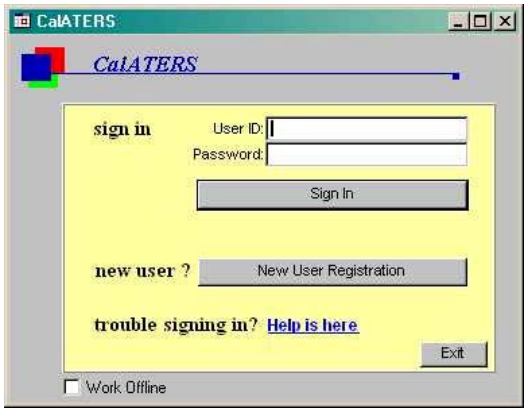
**Step 1**

You must first setup your laptop and/or computer to work offline, see Setting Up Laptop To Work Offline instructions located on the CalATERS website.

Access CalATERS from your desktop.




**Step 2**




Key User ID and Password.

Click Sign In.

**Step 3 - Information**

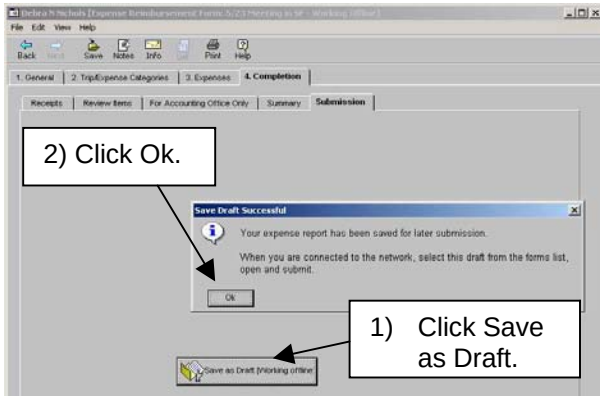
**Creating Forms**

Creating forms offline is very similar to creating forms online. Use the general instructions provided on the CalATERS website for detailed instructions on completing each screen.

**See restrictions for working offline, next page.**

**Step 4**

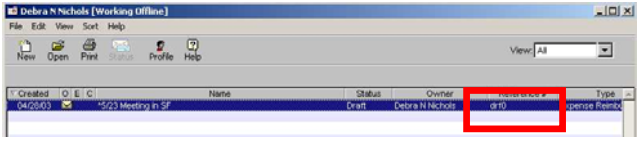
At the **Submission** tab:




Forms created offline cannot be submitted for approval offline. Click Save as Draft (working Offline), then click Ok.

**Step 5**

Once saved as a draft and closed, the form appears on the Work Queue with a "drf" number assigned in the **Reference #** field instead of a TEA or TAF form number.

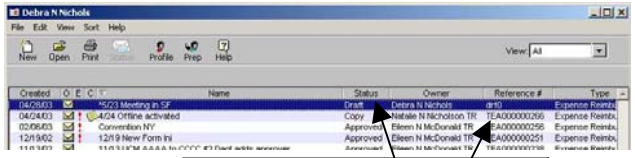


Note: Only forms created offline will display on the work queue.

**Step 6**

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 have a **Status** of "Draft" and have a Reference # starting with **DRF.**
4) Open the Offline form.



Status is Draft, Reference # begins with "drf".

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**Step 7**

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.

The form will now follow the regular submission process. It will be assigned a TEA or TAF number which will be displayed in the **Reference #** column on the work queue.

## Offline Restrictions

- 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. This second form will remain on the Work Queue until it is deleted. Forms CANNOT be deleted while working offline.
- Work Queue will only display Travel Advances or Expense Reimbursements created offline. All other forms will not be displayed and cannot be accessed offline.
- Cancel, Delete, Renotify Approver, Form Archive Retrieval are not available when working offline.
- Forms created offline will only display on the laptop 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).
- Approvers cannot approve forms offline.
- Forms cannot be created by a submitter or preparer for other employees.
- Only one user per laptop can work offline. See detailed instructions titled, Working Offline, section **VI. Changing Offline User on the Laptop**.
- Profile information can be viewed but cannot be updated offline.