TRAVEL MANAGER PREPARER'S GUIDE

COPY A TRAVEL AUTHORIZATION

A useful feature in the Travel Manager system is the ability to copy a document. The copy feature can be used in many ways. A document may be renamed, an itinerary can be copied for multiple travelers going to the same destination or it can be used for a traveler who is repeating a trip taken before. This section addresses the steps to copy a travel document.

COPY A TRAVEL AUTHORIZATION

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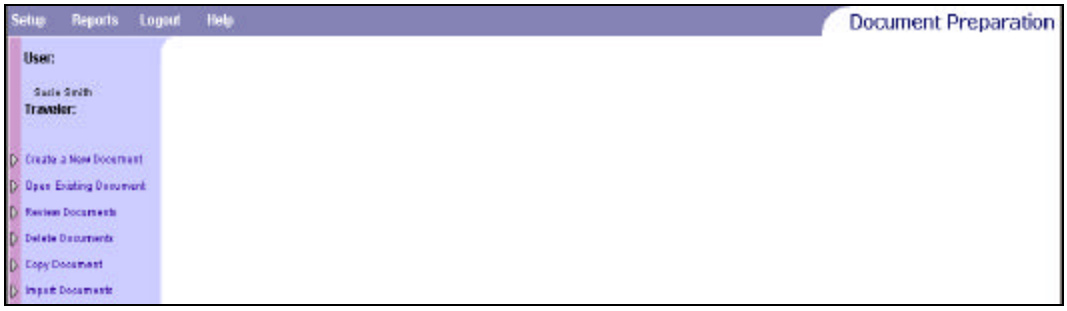
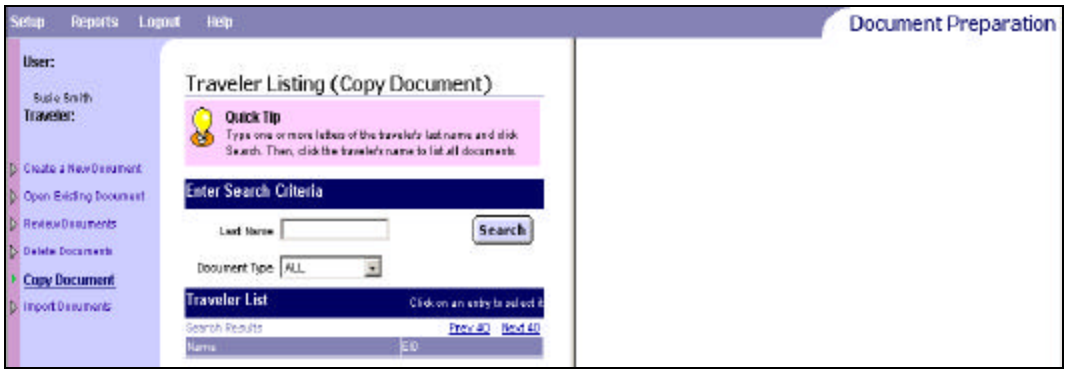
A. COPY DOCUMENT

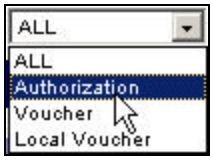
This section describes the steps required to copy a document once you have signed into the Travel Manager system. Use the copy document feature if you need to rename a document, a traveler's itinerary is the same as a prior trip that was taken, or a group of traveler's have the same destination.



1. Click the **Copy Document** link on the Document Toolbar on the left side of the page. The Traveler Listing (Copy Document) page will be displayed.

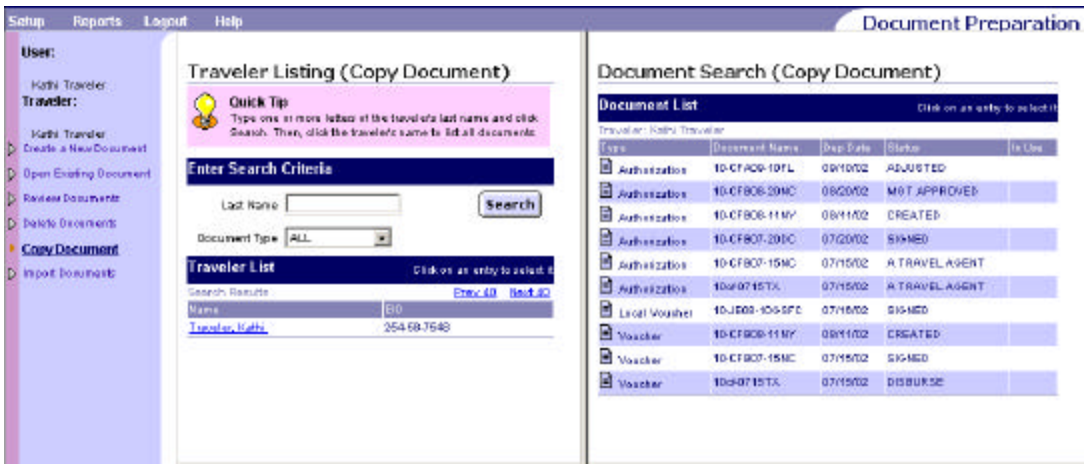


2. Specify the type of document to copy by selecting the type from the Document Type pull down list. Only documents of that specific type will be displayed for copying. "All" is the default.



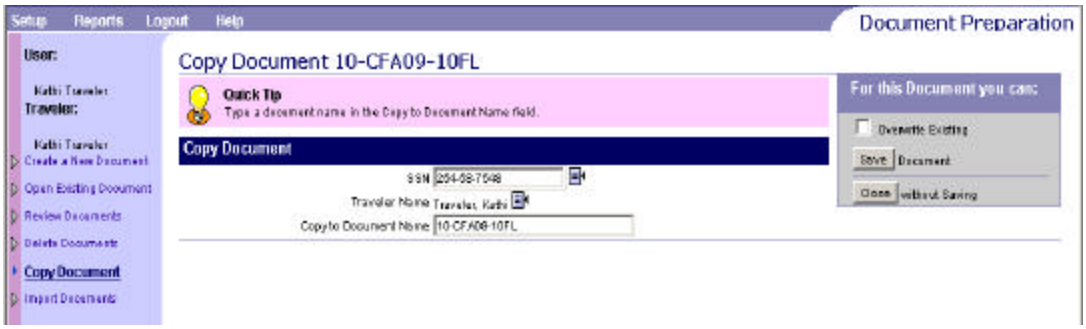
3. Enter the traveler's last name in the **Last Name** field if you prepare documents for more than one traveler.

4. Click the Search button next to the Last Name field. The Traveler's name will be displayed in the Traveler Listing (Copy Document) area on the left side of the page. All documents created for that traveler will be displayed in the Document Search (Copy Document) area on the right.



5. Click the **Document** icon of the document to be copied from the list. The Copy Document page will be displayed.

6. Select a process to follow: Rename a document, Traveler going to the same destination on a different date, or More than one Traveler traveling to the same location.



NOTE

Do not use the Overwrite Existing check box in the For This Document You Can: area in the top right, unless the document that will be overwritten has not been routed.

7. Use the copy document feature when a document needs to be renamed, if you have a traveler traveling to the same destination on a different date, or if a group of traveler's is going to the same destination.

   a. Rename a document

      (1) Click in the Copy to Document Name field on the Copy Document page.

      (2) Enter the new document name following the Headquarters document naming convention.

      (3) Click the Save **Document** button in the **For this Document you can:** area in the top right. A pop-up message stating the copy process is complete will be displayed.

      (4) Click the Close button in the pop-up message window. The Traveler Listing (Open Document) page will be displayed.

      The document has been copied with the new name. It can be edited, if necessary, and stamped to route. See Section B to open the copied document.

   b. Traveler traveling to the same destination on a different date

      (1) Click in the **Copy to Document Name** field on the Copy Document page.

(2) Change the travel date. (For example: original document name 10-CFA**09-10**FL; new document name 10-CFA**12-03**FL)

(3) Click the Save **Document** button in the **For this Document you can:** area in the top right. A pop-up message stating the copy process is complete will be displayed.

(4) Click the Close button in the pop-up message window. The Traveler Listing (Open Document) page will be displayed.

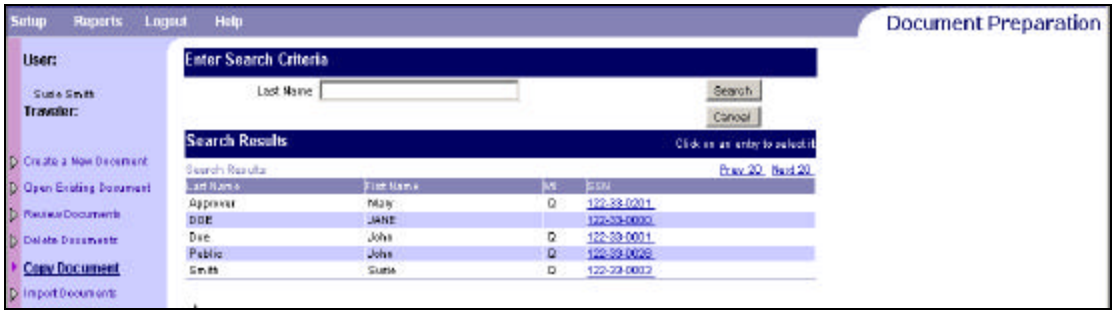
The document has been copied with the new travel dates recorded for the document name. Dates on the travel document will need to be changed to reflect the new travel dates. See Section B to open the copied document.

c. More than one Traveler traveling to the same location:

When more than one traveler is traveling to the same location the document name will remain the same. Only the Traveler name will be changed.

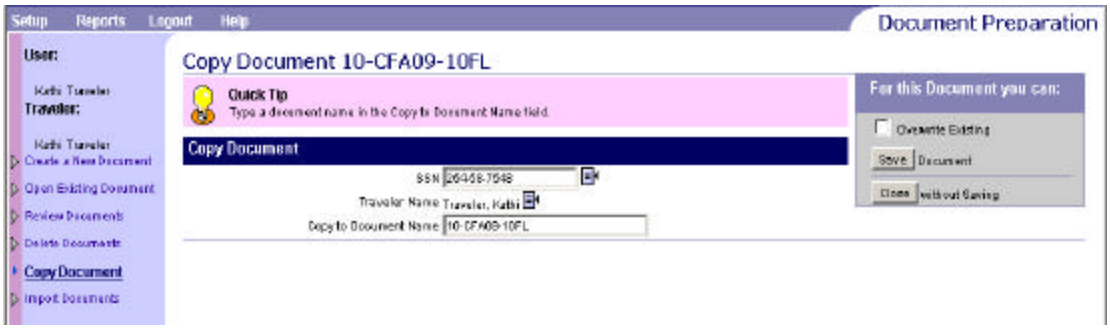
(1) Click the **SSN** icon or the **Traveler Name** icon on the Copy Document page to retrieve the desired traveler's name. The Enter Search Criteria page will be displayed.

(2) Enter the Last Name in the Last Name field of the Enter Search Criteria area.

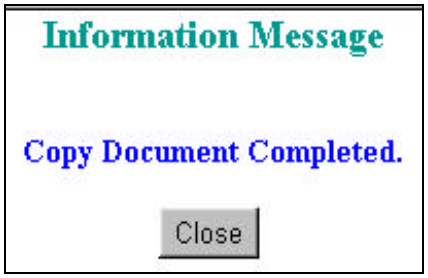


(3) Click the Search button to the right of the field. The Search Results will be displayed beginning with the last name of the value entered.

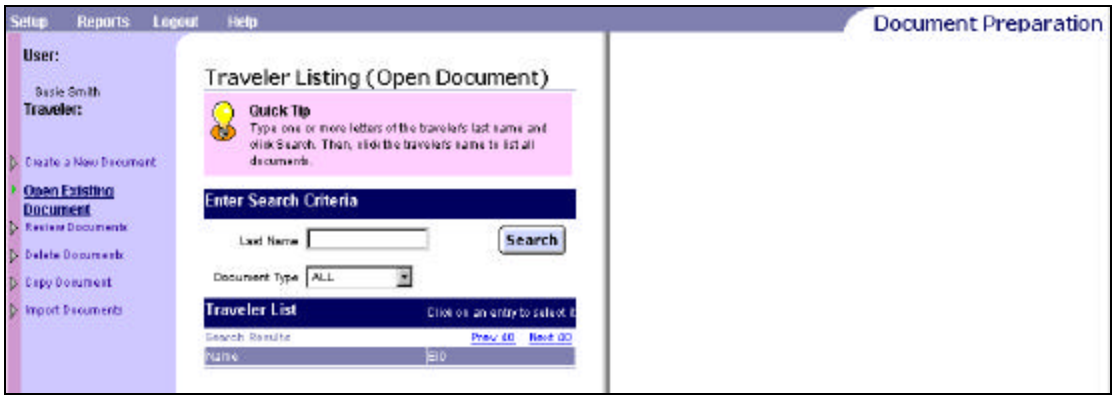
(4) Click the **SSN** link next to the desired traveler's name. The Copy Document page will be re-displayed with the new traveler's name in the Traveler Name field.



(5). Click the **Document** button in the **For This Document You Can:** area in the top right. A pop-up message stating the copy process is complete will be displayed.



(6.) Click the button in the pop-up message window. The Traveler Listing (Open Document) page will be displayed.

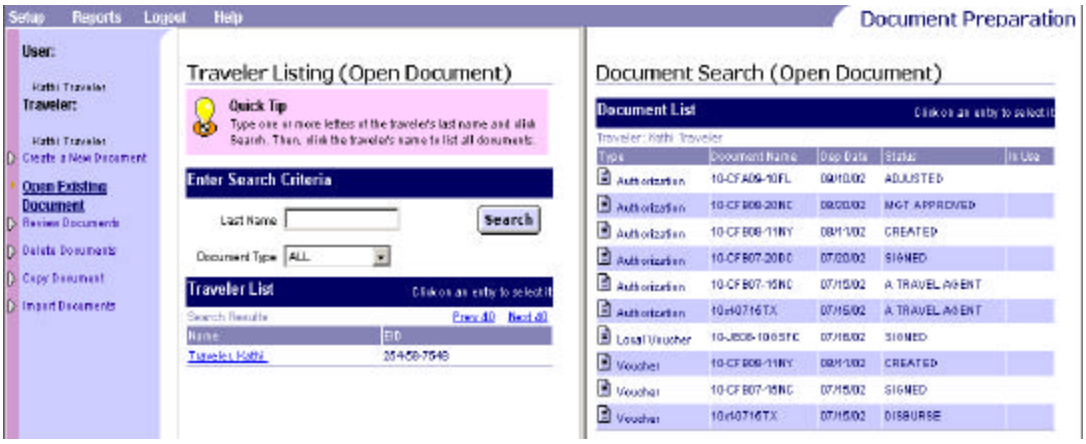


It will be necessary to review the traveler's document and make necessary changes to the itinerary departure and return selection and any other pertinent information that may be particular to the traveler whose document is being edited. See Section B to open the copied document.

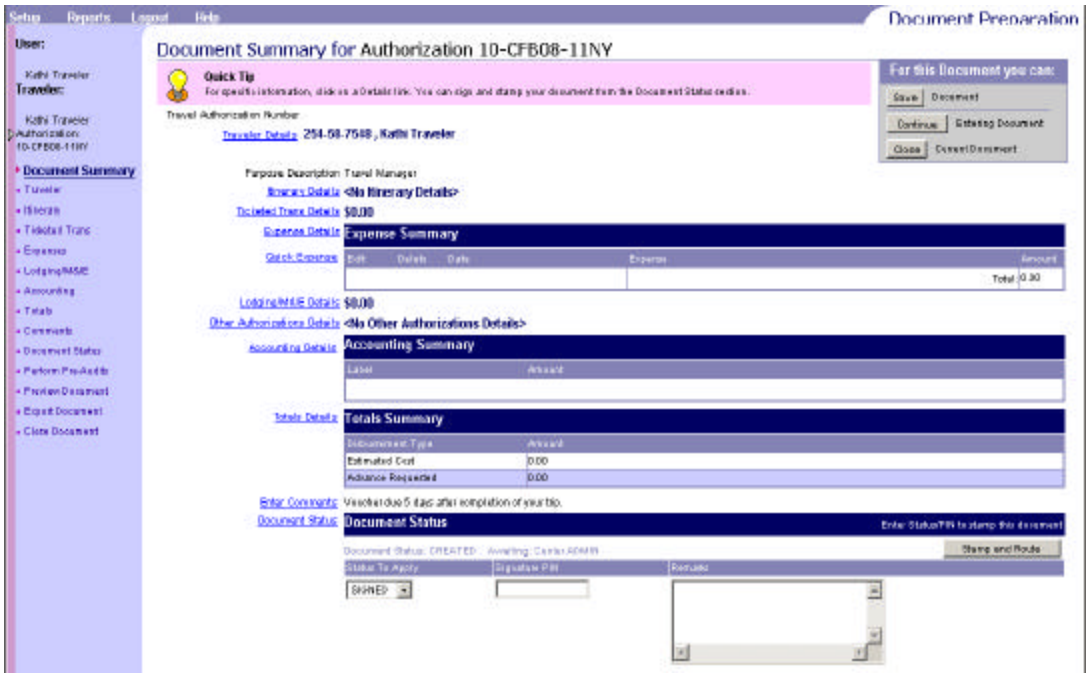
B. OPEN THE COPIED DOCUMENT

1. Enter the Traveler's last name in the Last Name field of the Traveler Listing (Open Document) page.

2. Click the **Search** button next to the Last Name field. The Traveler's name will be displayed in the Traveler List area on the left side of the page. The Traveler's documents will be displayed in the Document Search (Open Document) area of the page on the right.



3. Click the **Document** icon for the document name that was copied. The Document Summary page for the copied document will be displayed.



1. The travel authorization is the same as the original except for the following:

   a. Name of the traveler and/or name of the document.

   b. Other Authorizations.

2. Make the necessary changes to the new document, save the changes, stamp the document SIGNED, and route it. **See Section on how to make adjustments to the document.**

NOTE
This document can be modified and routed. Make sure all required information is included on the document for each individual Traveler.

3. Click the Close Document link on the Document Toolbar on the left side of the page or click the Close **Current Document** button in the **For This Document You Can:** area in the top right or the Document Summary page if the document will not be routed at this time.