



VE5 Request for Travel

FOR ASSISTANCE, YOU MAY CONTACT THE FOLLOWING:

Travel Polices or Procedures Questions -- x4833

VE5 - REQUEST FOR TRAVEL AUTHORIZATION

PURPOSE

The VE5 is a Request for Travel Authorization (RTA), and it is used to authorize travel for employees who are traveling for UTSA business.

BEFORE YOU START

It is important that you understand UTSA travel rules and regulations before preparing this document.

You will need to know the following information:

- Traveler's name and EID information
- Dates of Travel
- Destination
- Purpose and benefit of trip
- Disposition of duties while traveling
- At least one possible account number to be charged

HOW TO USE

The VE5 is organized in 6 parts:

- Cover Sheet
- Destination Code
- Purpose of Travel
- Washington DC Travel
- Account Information
- Define Codes (optional)

```
>>Enter additional information or enter an ACTION.<<
*DEFINE          REQUEST FOR TRAVEL AUTHORIZATION - VE5   Year 04 05
Command: VE5   Account:_____   Misc:_____   Month: SEP
=====
Status:          -COVER SHEET-          Document ID:_____
Action:_____   Summary:_____
Created: 01/17/05 by KBJEF
Format: _____   Template:          Process Date:
Travel Dates: Begin:_____   End:_____   Voucher Date:_____   DTN:_____
RTA Nbr:_____   Designated HQ: _____
VID Number:   UT EID: _____   MC: _____   Name:
Traveler Type: ___   Title: _____
SECTIONS:
__ 1  Destination Code      Locale      Description
      _____
      _____

__ 2  Purpose of Travel:      ___          +
      Benefits to UT:         ___          +
      Disposition of Duties:  ___          +
__ W  Washington DC Travel:
__ 3  Account Information   No Cost to UT: ___
__ 4  Define Codes (Optional)

--3 UT San An -----F1=Options -----F8=Exit -----1/17/05 03:30 PM --
```

VE5 – COVER SHEET

- To create a VE5, type NEW in the Action field, tab to the Format field, type 01, and press ENTER.
 - The document Status will become CREATED and a Document ID number will be assigned. The Summary line will indicate DOCUMENT IN PROGRESS, the Voucher Date will default to the current date, a RTA Nbr (Request Travel Authorization) will be assigned and the Designated HQ will automatically fill in, however this field can be updated.
- Tab to the Travel Dates Begin and End field, type the departure/return dates in MMDDYY format (012805) for this trip and press ENTER to update the information.

```

>>Enter additional information or enter an ACTION.<<
*DEFINE          REQUEST FOR TRAVEL AUTHORIZATION – VE5          Year 04 05
Command: VE5  Account:_____ Misc:_____                      Month: SEP
=====
Status: CREATED          -COVER SHEET-          Document ID: R3VE5998912
Action: NEW          Summary: DOCUMENT IN PROGRESS
Created: 01/17/05 by KBJEF– FROST, JACK E
Format: 01          Template:          Process Date:
Travel Dates: Begin: 012805 End: 013105          Voucher Date: 011705 DTN:_____
RTA Nbr: TV04001153          Designated HQ: UTSA
VID Number:  UT EID: ? _____ MC: _____ Name:
Traveler Type:  _____ Title: _____
SECTIONS:
__ 1  Destination Code          Locale          Description
      _____
__ 2  Purpose of Travel:          _____          +
      Benefits to UT:          _____          +
      Disposition of Duties:          _____          +
__ W  Washington DC Travel:          _____          +
__ 3  Account Information          No Cost to UT:  _____
__ 4  Define Codes (Optional)
--3 UT San An -----F1=Options -----F8=Exit -----1/17/05 03:30 PM –
    
```

- Tab to the VID Number (Vendor Identification) field and type the traveler's VID number.
- An Individual's VID will begin with 2 and then their 9-digit social security number followed by a check digit and a 3-digit mail code. (Example: 23334455551000)
- If you do not have the complete VID, you can access the VID help screen by typing a "?" in the VID Number field. See the VID help pop-up window example on the next page.

VE5 – COVER SHEET

- Tab to the Name From field, type the vendor's name as follows: Last Name, First Name leaving a space between the comma and the traveler's first name and press ENTER.
- If the Traveler's VID doesn't exist or if the address is incorrect, use Command GGV to request/setup a new or change an existing Vendor ID or contact Dorothy Cheatham at ext. 4836.
- Once you have located the VID that you're requesting, tab to the field left of the traveler's name and type "A" (Addresses) and press ENTER. Entering will take you to a list of addresses for the Traveler.

Pop-up window

```

>> Press ENTER to page forward <<
Selection: __
List Entities by,
Name from: White, Snow
ID from: _____
Expand Display to show 'A'ddresses, 'N'ames
'Identifiers, or 'P'ointers
Name                ID Type: UN      Vendor EID:
1 A White, Snow    217534445556  white64
2 __ Wilson, Alice    21148129999     aw222
3 __ Wise, Rick       21317678888     rw646
4 __ Withers, Betty   21507887777     bw448
5 __ Witt, Terry      21870916666     tw688
Press CLEAR to exit
    
```

- Tab to the appropriate address for the traveler, type an X in the field to the left of the address and press ENTER.

```

>> End of list; ENTER to scroll forward, CLEAR to exit listing <<
ACTIVE addresses for: White, Snow
ID: white64
Starting Mail code: ____
Inactive Addresses only: __

To select an address/mail code mark with an X

Address                City          St      Zip      Mail Code
-----
1 X 1800 Forrest Trl    SAN ANTONIO TX      78249212904 000
2 __ **Direct Deposit**                                001

Press CLEAR to exit
    
```

- A pop-up window will appear prompting you to select a job title for this traveler. If the traveler has more than one title, select the title that applies to the travel. Once selected, it will return to the VE5 cover sheet with the title and complete VID number filled in.

VE5 – COVER SHEET

- Tab to Travelers Type field and type an E or P. A Traveler Type code is a 1-letter code that identifies the traveler as an:
 - (E) Employee – someone who is employed at UTSA
 - (P) Prospective employee - someone traveling to UTSA for the purpose of a job interview
 - (S) Student – student travel will continue with paper

NOTE: If the traveler is an employee, the system will default to Traveler Type E.

```

>>Enter additional information or enter an ACTION<<
*DEFINE          REQUEST FOR TRAVEL AUTHORIZATION – VE5          Year : 04 05
Command: VE5     Account:_____ Misc:_____                Month: SEP
=====
Status:  CREATED          -COVER SHEET-          Document ID: R3VE5998912
Action:  NEW             Summary: DOCUMENT IN PROGRESS
        Created: 01/17/05 by KBJEF – FROST, JACK E
        Format:  01             Template:          Process Date:
Travel Dates: Begin: 012805 End: 013105 Voucher Date: 011705 DTN:_____
RTA Nbr: TV04001153 Designated HQ: UTSA
VID Number: UT EID: white64 MC:002 Name: White, Snow
Traveler Type: E Title: Professor
SECTIONS:
__ 1 Destination Code          Locale          Description
    _____
__ 2 Purpose of Travel:          _____          +
    Benefits to UT:             _____          +
    Disposition of Duties:       _____          +
__ W Washington DC Travel:          _____          +
__ 3 Account Information          No Cost to UT: __
__ 4 Define Codes (Optional)
--3 UT San An -----F1=Options -----F8=Exit -----01/17/05 03:30 PM –
    
```

NOTES:

VE5 - DESTINATION CODE

- Tab to the Destination Code field, a 5-letter code is required in this section. If you do not know the code, type a "?" in this field and press ENTER to see a list of available codes.

```

>>Enter additional information or enter an ACTION.<<
*DEFINE      REQUEST FOR TRAVEL AUTHORIZATION - VE5      Year: 04 05
Command: VE5  Account:_____ Misc:_____      Month: SEP
=====
Status:  CREATED      -COVER SHEET-      Document ID: R3VE5998912
Action:  NEW      Summary: DOCUMENT IN PROGRESS
Created: 01/17/05 by KBJEF - FROST, JACK E
Format:  01      Template:_____      Process Date:_____
Travel Dates: Begin: 012805 End: 013105      Voucher Date: 011705      DTN:_____
RTA Nbr: TV0401153      Designated HQ: UTSA
VID Number: UT EID: white64 MC: 002      Name: White, Snow
Traveler Type: E      Title: Professor
SECTIONS:
__ 1  Destination Code      Locale      Description
      ?_____
__ 2  Purpose of Travel:      _____      +
      Benefits to UT:      _____      +
      Disposition of Duties:      _____      +
__ W  Washington DC Travel:      _____      +
__ 3  Account Information      No Cost to UT: ___
    
```

```

List of City Codes in the U.S.
Selection: 6      Mark to see foreign countries: ___
List City by Codes from: CA ___ ___ (State Prefix then City)
List by County from: _____

Nr State      City Code      City      County
1 California  CAASI      ASILOMAR  MONTEREY
2 California  CAASI      ASILOMAR  MONTEREY
3 California  CABAK      BAKERSFIELD  KERN
4 California  CABAK      BARSTOW   SAN BERNARDINO
5 California  CABAR      BERKELEY  ALAMEDA
6 California  CABER      BEVERLY HILLS  LOS ANGELES
7 California  CABEV      BRIDGEPORT  MONO
8 California  CABRG      BRIDGEPORT  MONO
9 California  CABUR      BURBANK    LOS ANGELES
10 California CACAM      CAMARILLO  CALIFORNIA
Press ENTER to Continue, CLEAR to cancel, F2 to add city
    
```

- Destination codes consist of 5 letters. The first 2 letters are the state postal code and the next 3 letters represent the city.
- To view a list of city codes in the U.S., tab to the List City by Codes from field, type a 2-letter state postal code and press ENTER. You may also search by county names.
- To view a list of city codes outside the U.S., tab to the Mark to See Foreign Countries field, type an X, and press ENTER. The foreign destination codes are listed in alphabetical order.

NOTE: The Foreign Countries section should also be marked to view cities in Alaska, Mexico, Hawaii and Canada.

- Once you have located your destination code, type the selection number in the Selection field and press ENTER, the screen will return to the VE5 cover sheet with the destination code field completed.
- If the city or country that you are requesting is not listed, you can add a city by requesting a new code for the destination list, press F2 while viewing the list of city codes.
- A window will appear prompting you to make a request. Enter your requested city information and press ENTER. These codes are created daily. You should receive a *TXMAIL message the next day notifying you of the setup.

```

Please fill in as much information as possible to add the city to the
destination code table.

City:      _____
County:    _____
State:     _____
Country:   _____

Press enter to add or 'CLEAR' to cancel request
  
```

- If there are more than 2 destinations, type X next to Section 1 and press ENTER.

```

>>Enter additional information or enter an ACTION.<<
*DEFINE          REQUEST FOR TRAVEL AUTHORIZATION - VE5   Year: 04 05
Command: VE5    Account:_____ Misc:_____          Month: SEP
=====
Status:  CREATED          -COVER SHEET-          Document ID: R3VE5998912
Action:  NEW           Summary: 092204 - White, Snow - Barstow, CA
Created: 01/17/05 by KBJEF - FROST, JACK E
Format:  01           Template:
Travel Dates: Begin: 012805 End: 013105 Voucher Date: 011705 DTN:_____
RTA Nbr: TV04001153      Designated HQ: UTSA
VID Number: UT EID: white64 MC: 002          Name: White, Snow
Traveler Type: E           Title: Professor
SECTIONS:
  X 1  Destination Code      Locale      Description
      CABAR                O          BARSTOW, CA
      CABER                O          BERKELEY, CA
  ___ 2  Purpose of Travel:    ___          +
        Benefits to UT:      ___          +
        Disposition of Duties: ___          +
  W Washington DC Travel:  ___          +
  ___ 3  Account Information    No Cost to UT: ___
  ___ 4  Define Codes (Optional)

--3 UT San An -----F1=Options -----F8=Exit -----1/17/05 03:30 PM -
  
```


VE5 - PURPOSE OF TRAVEL

- Type the appropriate code in the field listed below for, Purpose of Travel, Benefits to UTSA, and a Disposition of Duties. If you do not know the required code, type a "?" in the field and press ENTER to see a list of available codes.
- If the Destination Code DCWAS (Washington, DC) is selected, the Purpose of Travel field will default to a generic code of 40 (Travel to Washington, DC).

*DEFINE			
REQUEST FOR TRAVEL AUTHORIZATION – VE5		Year 04 05	
Comand: VE5	Account: _____	Misc: _____	Month: SEP
=====			
Status: CREATED	-COVER SHEET-	Document ID: R3VE5998912	
Action: <u>NEW</u>	Summary: <u>012805 – White, Snow – Barstow, CA</u>		
Created: 01/17/05 by KBJEF – FROST, JACK E			
Format: <u>01</u>	Template:	Process Date:	
Travel Dates: Begin: <u>012805</u> End: <u>013105</u>		Voucher Date: <u>011705</u>	DTN: _____
RTA Nbr: TV04001153		Designated HQ: <u>UTSA</u>	
VID Number: UT EID: white64 MC: 002		Name: White, Snow	
Traveler Type: <u>E</u>		Title: <u>Professor</u>	
SECTIONS:			
<u>X</u> 1	Destination Code	Locale	Description
	<u>CABAR</u>	O	BARSTOW, CA
	<u>CABER</u>	O	BERKELEY, CA
<u>X</u> 2	Purpose of Travel:	<u>?</u>	+
	Benefits to UT:	—	+
	Disposition of Duties:	—	+

NOTE: If the Purpose of Travel is for a meeting or conference (Purpose Code 01), additional information will be required in the moreable field (+) for Purpose of Travel and Benefit to UT. The additional information should include the business purpose, benefit, and how many others will be attending the same function.

Purpose of Travel Codes:

List of Purpose Codes

Select Nbr: _____

Code	Description
01	Attend meeting, conference, etc.
02	Conduct lecture or teach course.
03	Perform research activities.
04	Participate or officiate in an event
05	Recruit prospective employee or student.
06	Site or field visit.
07	Serve as expert witness.
08	Present original research paper.
09	Fundraising.
10	Negotiate a contract.

Benefits to UT Codes:

List of Benefits to UT

Select Nbr: _____

Code	Description
01	Help accomplish research objectives.
02	Help fulfill contract provisions.
03	Enhance grad/undergrad curriculum.
04	Enhance performance of job duties.
05	Enhance university operations.
06	Enhance reputation of the University.
07	Raise funds for faculty/student support.
99	Other (Specify in moreable)

Disposition of Duties Code:

List of Disposition of Duties

Select Nbr: _____

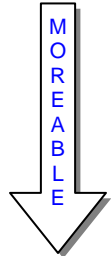
Code	Description
01	No classes missed.
02	Duties assumed by colleagues or staff.
03	Duties require travel.
04	Duties held until return.
99	Other (Specify in moreable)

VE5 - PURPOSE OF TRAVEL

- For Purposes of Travel you must type the name of the meeting, conference, seminars and research papers in the additional comments field, also known as the Moreable field (+).
- Tab to the Moreable field and type an X over the + and press ENTER or you can space through the + and press ENTER.

```

>>Enter additional information or enter an ACTION.<<
*DEFINE          REQUEST FOR TRAVEL AUTHORIZATION - VE5          Year 04 05
Command: VE5     Account:_____ Misc:_____                Month: SEP
=====
Status:  CREATED          -COVER SHEET-          Document ID: R3VE5998912
Action:  NEW            Summary: 012805 - White, Snow - Barstow, CA
        Created: 01/17/05 by KBJEF - FROST, JACK E
        Format:   01            Template:          Process Date:
Travel Dates: Begin: 012805 End: 013105          Voucher Date: 011705          DTN:_____
RTA Nbr: TV04001153          Designated HQ: UTSA
VID Number: UT EID: white64 MC: 002          Name: White, Snow
Traveler Type: E            Title: Professor
SECTIONS:
  X 1  Destination Code          Locale          Description
      CABAR                      O              BARSTOW, CA
      CABER                      O              BERKELEY, CA
  X 2  Purpose of Travel:       01            Attend meeting, conference, etc          +
      Benefits to UT:          06            Enhance University Operations          +
      Disposition of Duties:   02            Duties assumed by Colleagues and staff +
  W   Washington DC Travel:
  3   Account Information          No Cost to UT: ___
  4   Define Codes (Optional)
--3 UT San An -----F1=Options -----F8=Exit -----1/17/05 03:30 PM -
    
```



- A window will appear allowing more detailed information to be typed.

```

-----
You may update this "additional comments" section.  <<AQNPVE5T
Additional Comments for Purpose of Travel
-----
To attend the Texas Association of Certified Public Accountant Seminar
-----
-----
-----
    
```

- If more than one purpose, benefit or disposition of duties is needed, type X next to the section 2 and press ENTER. A window will appear to allow more codes.

```

-----
REASONS FOR TRAVELING
-----
Document ID: R3VE5998912          Section: 2 of 04
-----
Purpose:      01      Attend Meeting, Conference, etc.          +
              ___
              ___
Benefits to UT: 06      Enhance University Operations          +
              ___
Disposition of Duties:
              02      Duties assumed by colleagues or staff          +
              ___
    
```

VE5 - WASHINGTON DC TRAVEL

- Section W must be completed whenever a Washington, DC destination code (DCWAS) has been entered. The Purpose of Travel field will default to a generic code of 40 (Travel to Washington, DC).

```

>>Enter additional information or enter an ACTION.<<
*DEFINE          REQUEST FOR TRAVEL AUTHORIZATION - VE5   Year: 04 05
Command: VE5     Account:_____ Misc:_____          Month: SEP
=====
Status:  CREATED          -COVER SHEET-          Document ID: R3VE5998912
Action:  NEW           Summary: DOCUMENT IN PROGRESS
        Created: 01/17/05 by KBJEF - FROST, JACK E
        Format:  01           Template:          Process Date:
Travel Dates: Begin: 012805 End: 013105 Voucher Date: 011705 DTN:_____
RTA Nbr: TV04001153 Designated HQ: UTSA
VID Number: UT EID: white64 MC: 002 Name: White, Snow
Traveler Type: E Title: Professor
SECTIONS:
__ 1  Destination Code      Locale      Description
      DCWAS                O            Washington, DC
__ 2  Purpose of Travel:    40          Travel to Washington, DC      +
      Benefits to UT:      ___          +
      Disposition of Duties: ___          +
X W  Washington DC Travel:          +
__ 3  Account Information          No Cost to UT: ___
__ 4  Define Codes (Optional)

--3 UT San An -----F1=Options -----F8=Exit -----1/17/05 03:30 PM -
    
```

- Type an X next to Section W and press ENTER. The following screen will appear:

```

WASHINGTON, DC TRAVEL INFORMATION
Document ID: R3VE5998912          Section: W of 04
-----
PRIMARY Committees/Offices/Agencies/Organizations TO BE VISITED
Purpose:  ?_          +
Visit 1  Date: _____ (mmddyy)
        Name: _____ (Person traveler is going to see)
        Organization: _____
Visit 2  Date: _____ (mmddyy)
        Name: _____ (Person traveler is going to see)
        Organization: _____
Visit 3  Date: _____ (mmddyy)
        Name: _____ (Person traveler is going to see)
        Organization: _____
    
```

VE5 – WASHINGTON DC TRAVEL

- In Section W you must provide a purpose code for the trip to Washington DC. To view the list of available codes type a "?" in the Purpose field and press ENTER.

WASHINGTON, DC TRAVEL INFORMATION

Document ID: R3VE5998912 Section: W of 04

PRIMARY Committees/Offices/Agencies/Organizations TO BE VISITED

Purpose: _?_ MOREABLE +

Visit 1	Date: _____ (mmddyy)	Name: _____ (Person traveler is going to see)
		Organization: _____
Visit 2	Date: _____ (mmddyy)	Name: _____ (Person traveler is going to see)
		Organization: _____
Visit 3	Date: _____ (mmddyy)	Name: _____ (Person traveler is going to see)
		Organization: _____

Purpose Codes for Wash, DC travel

Select Nbr: ____

Code	Description
41	Federal congressional testimony.
42	Federal congressional visit.
43	Agency visit (general).
44	Agency visit (grant follow-up).
45	Public interest grp or prof assoc mtg.
99	Other (Specify in moreable)

- After selecting the appropriate purpose code, provide detailed information about the scheduled visits, such as the Date of the travel, the Name of the person the traveler is going to see, and the name of the Organization.
- Type any additional comments in the moreable field (+).
- Once you have completed Section W, press ENTER to return to the cover sheet and proceed to Section 3.

NOTES:

VE5 - ACCOUNT INFORMATION

- If there will be no expense to UTSA for this travel, type an X to the right of the No Cost to UT field and press ENTER.

```

>>Enter additional information or enter an ACTION.<<
*DEFINE          REQUEST FOR TRAVEL AUTHORIZATION - VE5   Year 04 05
Command: VE5    Account:_____ Misc:_____ Month: SEP
=====
Status:  CREATED          -COVER SHEET-          Document ID: R3VE5998912
Action:  NEW    Summary: 092204 - White, Snow - Barstow, CA
Created: 01/17/05 by KBJEF - FROST, JACK E
Format:  01    Template:          Process Date:
Travel Dates: Begin: 012805 End: 013105 Voucher Date: 011705 DTN:_____
RTA Nbr: TV04001153 Designated HQ: UTSA
VID Number: UT EID: white64 MC: 002 Name: White, Snow
Traveler Type: E Title: Professor
SECTIONS:
  X 1 Destination Code      Locale      Description
      CABAR                O           BARSTOW, CA
      CABER                O           BERKELEY, CA
  X 2 Purpose of Travel:   01         Attend meeting, conference, etc      >
      Benefits to UT:      06         Enhance University Operations      +
      Disposition of Duties: 02         Duties assumed by Colleagues and staff +
  X W Washington DC Travel:
  X 3 Account Information  No Cost to UT: ___
  _ 4 Define Codes (Optional)
    
```

- If there will be expenses to UTSA, type an X next to Section 3 and press ENTER. The following screen will appear:

```

>>Make updates or Press ENTER to return<<
ACCOUNT INFORMATION
Document ID: R3VE5998912 Section: 3 of 04
-----
NO COST TO UT: ___

Account                Object Code      Amount
-----                -
_____                _____
_____                _____
_____                _____
_____                _____
_____                _____
                        TOTAL
-----
OPTIONAL EXPENDITURE BREAKDOWN
MEALS                  _____
LODGING                _____
TRANSPORTATION        _____
OTHER                  _____
                        TOTAL
    
```

- Type at least one account number for possible travel expenses in the Account Number field. You have the option of listing up to 5 accounts with corresponding amounts to be charged. All accounts must belong to the same master view.

VE5 – ACCOUNT INFORMATION

- You can also break down the estimated expenditures by meals, lodging, transportation, and other in the Optional Expenditure Breakdown field. If you choose to use this section, the total amount for all accounts must equal the total amount under the expenditure breakdown section.

>>Make updates or Press ENTER to return<<

ACCOUNT INFORMATION

Document ID: R3VE5998912 Section: 3 of 04

NO COST TO UT: ___

Account	UT Bill	Dept Encumber	Object Code	Amount
1970009975		—		250.00
_____		—		_____
_____		—		_____
_____		—		_____
_____		—		_____
TOTAL				250.00

OPTIONAL EXPENDITURE BREAKDOWN

MEALS	_____
LODGING	_____
TRANSPORTATION	_____
OTHER	_____
TOTAL	_____

- Currently Section 4 (Define Codes) is not used at UTSA.

VE5 - APPROVAL

- After you have completed all the required fields, type APP in the Action field and press ENTER. The document is checked for valid entries and, if correct, it will route to the employee's supervisor.
- Your status line will now read Pending or Proposed. The message at the top of the screen shows where the document went. If there are errors detected, the document will not be forwarded and the error message will tell you what to correct.
- When the document reaches final approval, you will receive an automatic notification copy in your YB2 in-box. The document status line will read APPROVED/FYI. To discard the FYI copy, type DIS in the Action field and press ENTER.

Helpful Tips for Electronic Documents:

1. **ROU – Routing**

To check the Routing for a document, type ROU in the Action field and press ENTER.

ROU will allow you to view the routing history of a document. ROU shows who created the document and when, who has approved it, the document's current location and if anyone received information copies. Anyone who can access a document may use action ROU at any time.

2. **REC – Recall**

To recall a document, type REC in the Action field and press ENTER.

REC recalls a document from its current desk, returning it to the recaller's inbox. Creators may recall a document and sometimes must give a reason for their action. The document must be on the screen before it can be recalled. REC changes the status field on the cover sheet and allows the recaller to make changes or delete the document. When a document has received final approval and the status is APPROVED, it may not be recalled.

3. **NOT – Notes**

To attach a note to the document, type NOT in the Action field and press ENTER.

NOT will allow you to type or read informal instructions or special comments. These notes are not generally considered an official part of the document. The date and name of the person who enters the notes are automatically saved with the remarks. Once notes are entered, they cannot be erased.

4. **FYA – For Your Approval**

To forward a document for approval, type FYA in the Action field and press ENTER. A pop-up window will appear requesting you to enter the logon ID (KBXXX) of the approver.

FYA allows you to route the document to a person or desk not ordinarily in the document routing path. It is especially useful for approvals needed on an exceptional basis. After a person approves an FYA document that has been forwarded to them, the document is routed to the next desk set up in the original routing sequence.

5. **FYI – For Your Information**

To send an information copy of a document, type FYI in the Action field and press ENTER. A pop-up window will appear requesting you to enter the logon ID of the person(s) you want to receive the information copy.

To remove a FYI copy from your electronic inbox (YB2), access the document, type DIS (for discard) in the Action field and press ENTER. The document will be discarded from your inbox.

FYI allows you to send an information copy of a document to 3 logon ID's or to a desk. The people you send the information copy to, do not have to be authorized to view the contents of the document. They're not allowed to change document data. Anyone who can access a document may send an information copy at any time. The document can be in any status, from created to approved.

6. **VER - Verify**

To verify if your document is correct, type VER in the Action field and press ENTER.

VER allows you to verify the accuracy of the data contained in a document. If the document has bad or incomplete data, you will get a screen listing corrections necessary to approve the document. You may verify document data at any time.

7. **DEL- Delete**

To delete a document, type DEL in the Action field and press ENTER.

Only the creator of the document can use this action. If the creator has already approved the document, it must be recalled first before deleting.

8. **DIS – Discard**

To discard an information copy, type DIS in the Action field and press ENTER.

DIS is a document action used to discard an information copy from the inbox (YB2). Only people who receive an information or notification copy of a document may discard it. The copy is not tied to a desk/view. Use this action when you have finished viewing the document and want to remove it from your inbox.

Help for the traveler:

There are various products available to help the traveler with his out of pocket expenses.

- If your department has a CBA card (Central Billed Account), airfare and transportation can be billed to this card.
- The travel office also can provide a travel advance for meals and lodging.
- Registration can be paid by the Procard.
- The traveler can apply for an IBA card (Individual Billed Account) which allows the traveler to charge his expense and not use his personal credit card for travel.
- Lodging can be prepaid via a VP2.

Please note- The VE5 is required PRIOR to making any travel arrangements or travel advances.