

Sign In Procedures and Access Problems

These instructions provide procedures for signing in to CalATERS applications and are used to assist the Help Desk in resolving access and usage problems.

NOTE: Throughout these instructions there are references to other sets of instructions (e.g., [Update Your Profile](#)). To access these instructions, go to the CalATERS web site, click [Travel Advance & Expense Reimbursement](#), then select a role (e.g., [Employee](#), [Preparer](#), [Submitter](#), [Approver](#), [Accounting](#) or [Help Desk](#)). Then select specific instructions.

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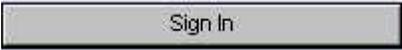
I. Sign In to CalATERS

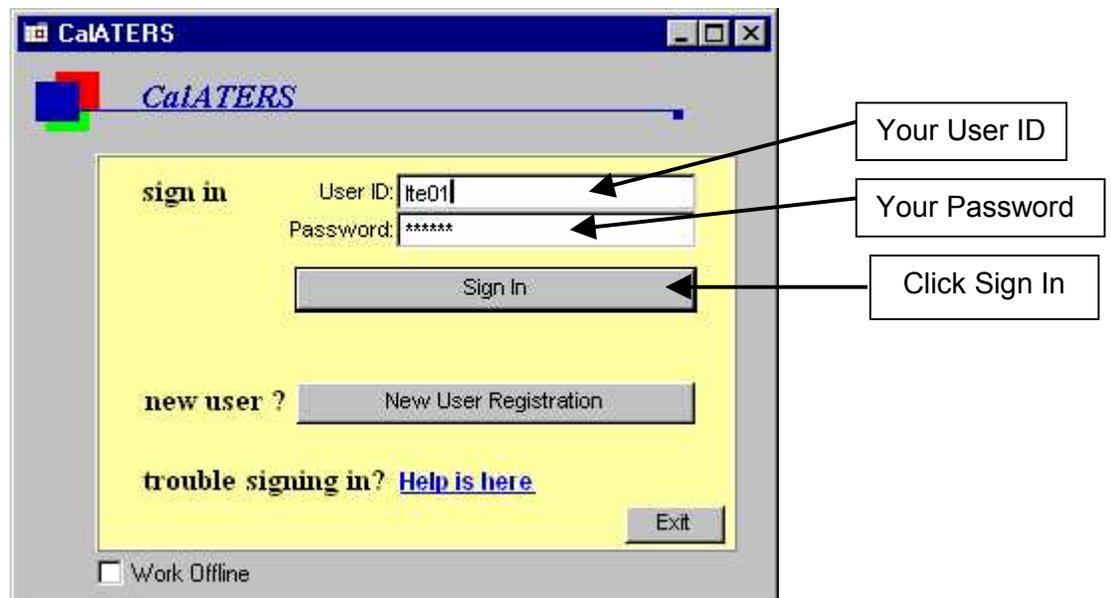
CalATERS-General Sign In

The CalATERS-General sign in is used by Employees, Approvers and Accounting staff to create, review and approve Expense Reimbursement and Travel Advance forms.

Click the  button from the CalATERS web site.

At the **Sign In** screen, in the **User ID** field, key your User ID. Key password in the **Password** field.

Click the  button. Your **Work Queue** will display.



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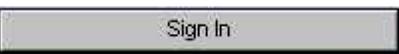
I. Sign In to CalATERS

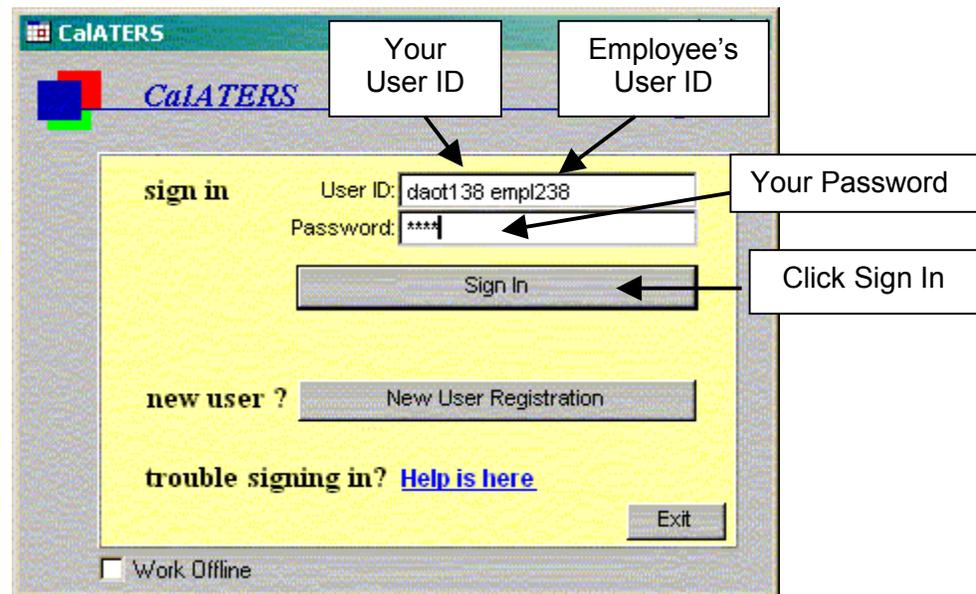
Logon As

This feature will allow Help Desk Staff and other authorized users to sign in to CalATERS to view other user's Work Queues and forms, and, based on the type of privilege assigned, update other employee's Profile information. Access to this function requires the "Logon As" privilege, which is requested by your department and set up by the State Controller's Office, Central System Administrator.

Click the  button from the CalATERS web site.

At the **Sign In** screen, in the **User ID** field, key your User ID, press the space bar, then key the User ID of the person whose Work Queue (or Profile) you want to view. Key your password in the **Password** field.

Click the  button. The **Work Queue** for the other user will display.



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I. Sign In to CalATERS

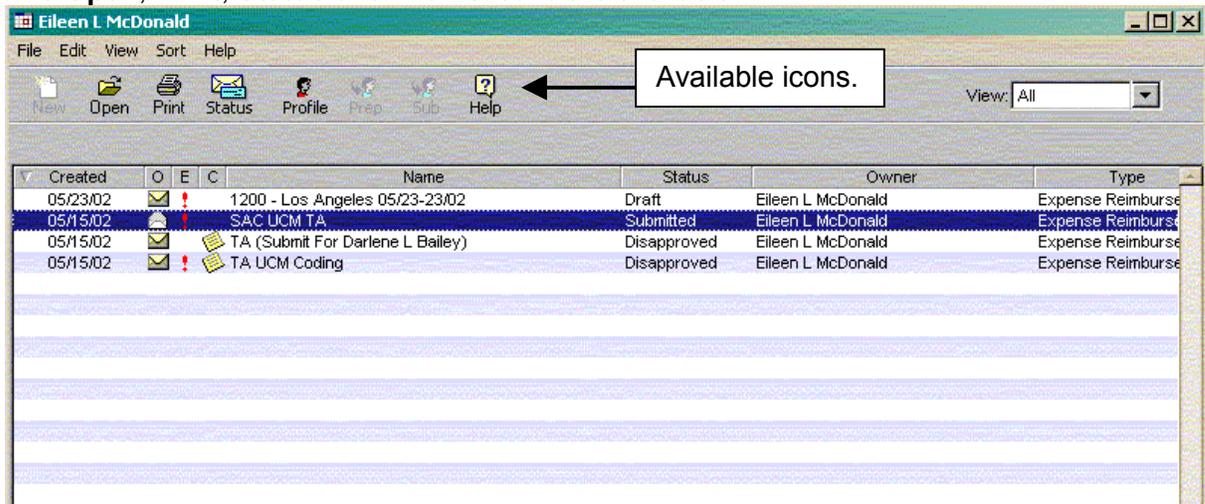
Logon As (continued)

When you logon as an employee, approver or accounting staff, you will be accessing that user's Work Queue.

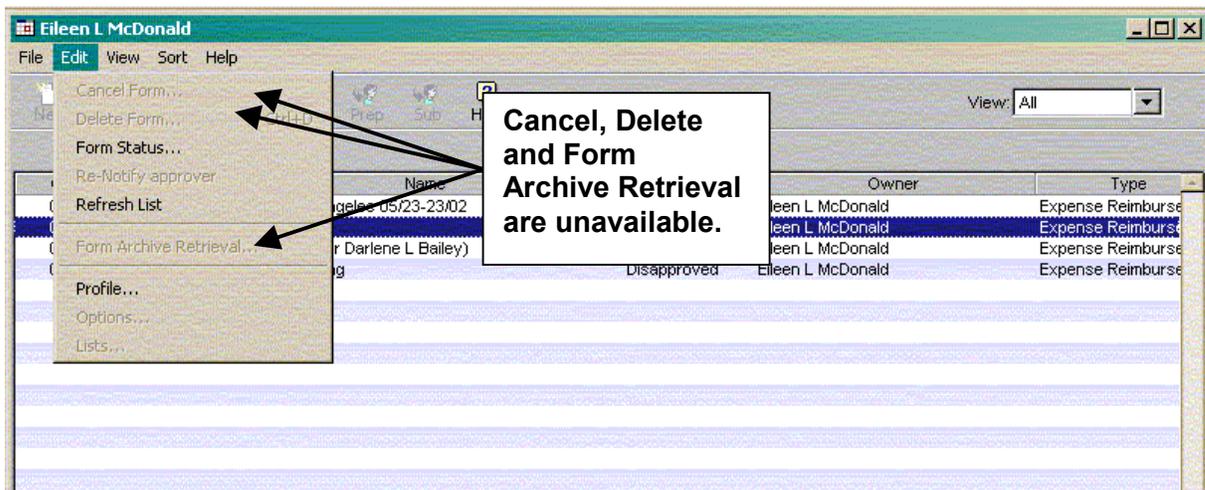
Function Availability: Some functions will not be available using Logon As.

As a security measure, the , , and  icons are not available using Logon As, because this function is intended to be used to view, and simulate user functions, with draft and in-process forms, not to create new forms.

The **Open**, **Print**, **Status** and **Profile** icons are available.



The **Cancel Form**, **Delete Form**, and **Form Archive Retrieval** options which are accessed from the **Edit** menu, are not available using Logon As. The employee or submitter will need to perform these functions themselves.

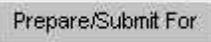


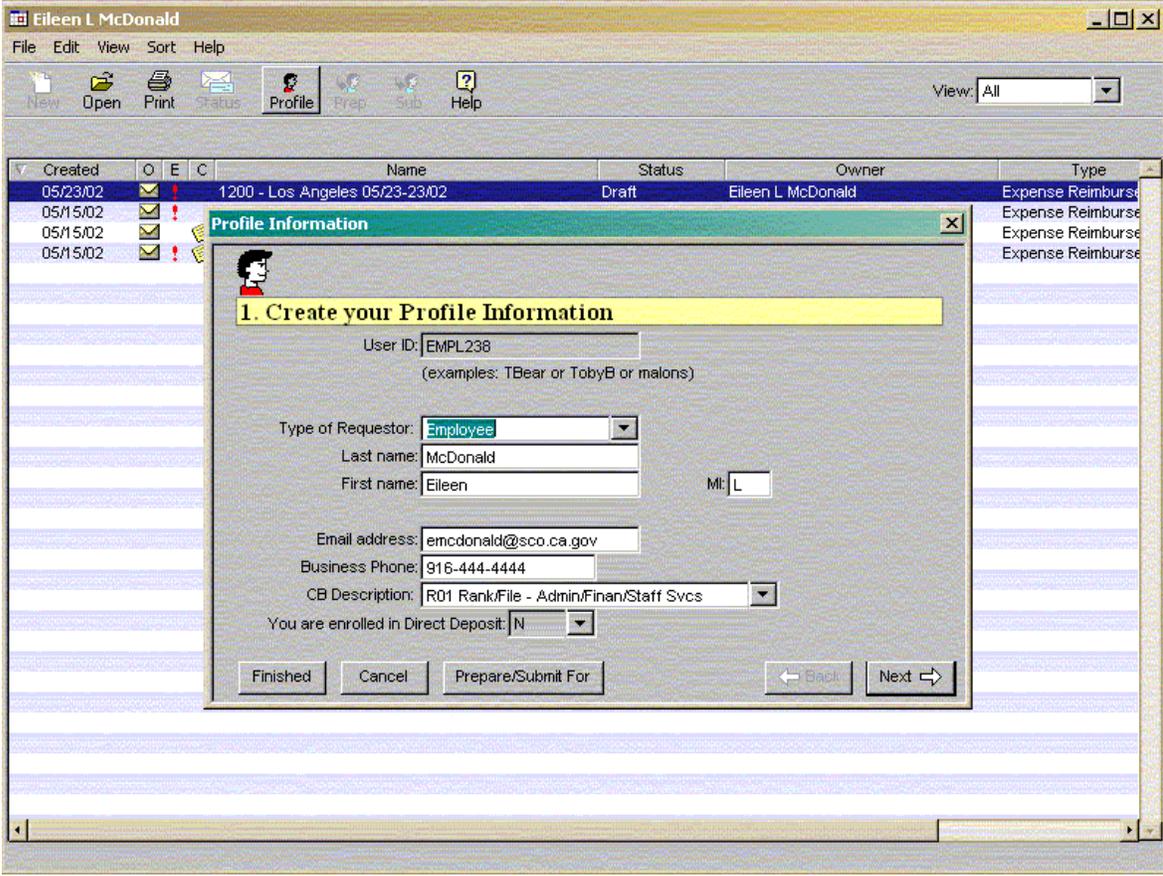
I. Sign In to CalATERS

Logon As (continued)

Profile (“Logon As Read” versus “Logon As Write”):

The  icon will display the employee’s current Profile. If the **Finished** button is available, you have the ability to update the employee’s Profile (Logon As Write privilege). If the **Finished** button is not available, you can view the Profile, but cannot update it (Logon As Read privilege). Privileges are requested by your department and assigned by the State Controller’s Office.

Note: When the  button is clicked, the **Change Password** tab that usually displays, will not display using Logon As.



The screenshot shows a web browser window titled "Eileen L. McDonald" with a menu bar (File, Edit, View, Sort, Help) and a toolbar (New, Open, Print, Status, Profile, Prep, Sub, Help). A table lists profile entries with columns for Created, O, E, C, Name, Status, Owner, and Type. A "Profile Information" dialog box is open, titled "1. Create your Profile Information". It contains the following fields:

- User ID: EEMPL238 (examples: TBear or TobyB or malons)
- Type of Requestor: Employee (dropdown)
- Last name: McDonald
- First name: Eileen
- MI: L
- Email address: emcdonaldt@sco.ca.gov
- Business Phone: 916-444-4444
- CB Description: R01 Rank/File - Admin/Finan/Staff Svcs (dropdown)
- You are enrolled in Direct Deposit: N (dropdown)

Buttons at the bottom include "Finished", "Cancel", "Prepare/Submit For", "Back", and "Next".

Password Not Received After New User Registration:

After New User Registration, CalATERS sends a system assigned password to the e-mail address in the employee’s Profile. If the e-mail address is incorrect, the employee will not receive their password and will not be able to sign in to CalATERS.

A Help Desk staff with the “Logon As Write” privilege can sign in as the employee and update the e-mail address in the employee’s Profile. The employee can then make a “Password Retrieval Request” to request a new password (see **Section IV. Userid/Password/Sign-in Problems** for additional information). **Note:** Help Desk staff with “Logon As” privilege cannot change a user’s password from the Profile “Change Password” screen.

I. Sign In to CalATERS

Logon As (continued)

Form Status (Checking for Approvals and Payment):



The **Status** button allows you to check the current status of a form, and also displays historical status information. This function can be used to verify approval(s) and payment statuses.

- 1) Highlight the form.
- 2) Click the **Status** button.
- 3) The **Form Status** window displays. Use the scroll bar to view additional status information.

The screenshot shows the CalATERS software interface. The main window displays a list of forms with columns for Created, O, E, C, Status, Owner, and Type. The form 'TER Test - Default Profile (no SAC)' is highlighted. A 'Status' button is visible in the toolbar. A 'Form Status' window is open, showing details for the selected form, including Name, Report, Reference #, and Status. The window also displays a table of actions taken, such as 'Final Approver', 'Sent to Fiscal', 'Funds Secured', 'ER/TA Extracted to Warr', and 'ER/TA Sent to Warr and EFT'. Annotations with arrows point to the 'Status' button, the highlighted form, and the 'Form Status' window.

Created	O	E	C	Status	Owner	Type
05/23/02	✓	!	x	Draft	Eileen L McDonald	Expense Reimburse
05/13/02	✓	!		Submitted	Eileen L McDonald	Expense Reimburse
05/13/02	✓	!		Submitted	Eileen L McDonald	Expense Reimburse
05/10/02	✓	!		Submitted	Eileen L McDonald	Expense Reimburse
05/07/02	✓	!		Completed	Eileen L McDonald	Expense Reimburse
05/07/02	✓	!		Completed	Eileen L McDonald	Expense Reimburse
05/07/02	✓	!		Completed	Eileen L McDonald	Expense Reimburse
04/29/02	✓	!		Completed	Eileen L McDonald	Expense Reimburse
04/26/02	✓	!		Completed	Eileen L McDonald	Expense Reimburse
04/25/02	✓	!		Completed	Eileen L McDonald	Expense Reimburse

Name	Action Taken	Receive Date	Action Date
Final Approver	Approved	05/07/02	05/07/02
PAYMENT STATUS			
Sent to Fiscal	Completed	05/07/02	05/07/02
Funds Secured	Completed	05/07/02	05/08/02
ER/TA Extracted to Warr	Completed	05/07/02	05/08/02
ER/TA Sent to Warr and EFT	Completed	05/07/02	05/08/02

For additional information on Status terms, refer to Definitions on the CalATERS web site.

I. Sign In to CalATERS

Logon As (continued)

Simulate Actions on Forms:

Logon As can be used to simulate the actions that an employee or approver is taking on a form. The employee or approver may be encountering automated rules (such as Hard Stops) which they do not know how to resolve, or they may be encountering system problems, either may result in a Help Desk call.

The Logon As function allows the Help Desk to view forms and to simulate the keystrokes of the employee or approver, when it is not feasible to go to the user's desktop to assist them. ONLY changes made by the user can be saved. Changes that you make to the form using Logon As will not be saved to the form.

Logged On As	Functions You Can Simulate
Employee	Add trips, add and delete expenses, view exception messages, and add notes...
Approver	Reduce expenses, view exception messages, and add notes...
Accounting Staff	Change/Add Accounting information (cannot simulate adding detailed account codes on the Expense tab), reduce and delete expenses, view exception messages, add notes, and adjust Travel Advance Recovery...

Note: For more detailed information on functions specific to each role, see [CalATERS Work Flow and Forms Processing for Help Desk](#), accessed from the CalATERS web site.

Saving new forms:

A draft form that has not been saved by the employee, needs to be saved before the form will be viewable on the work queue using the Logon As function. The employee should **Save** the form. Then, the Help Desk should click **Edit, Refresh List** to update the work queue after the form has been saved. Newly saved forms should display.

Saving Changes to forms:

Forms need to be saved when changes are made (for example, expenses are added or deleted, or trips are added or removed). The employee or approver should **Save** the form, then the Help Desk should **Close** the form and **Open** it again. The changes will display once the form is reopened.

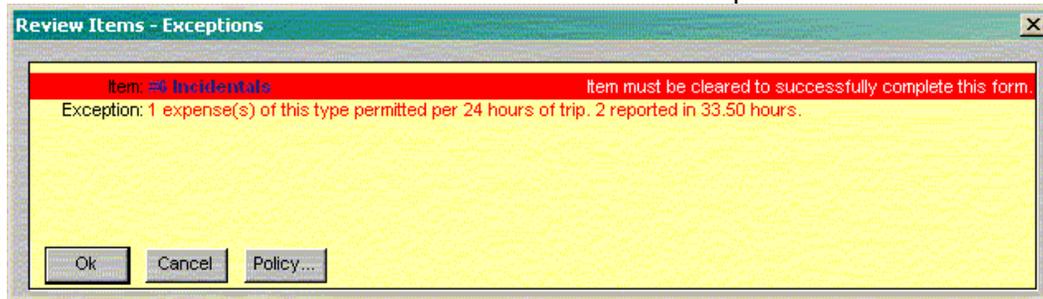
I. Sign In to CalATERS

Logon As (continued)

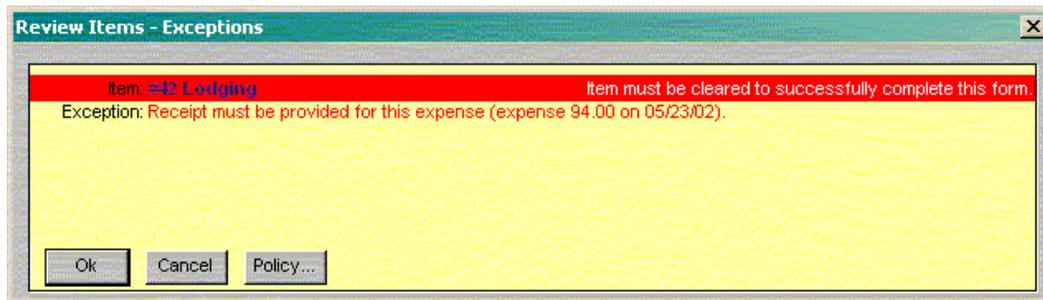
Simulate Actions on Forms:

Sample Hard Stop Messages

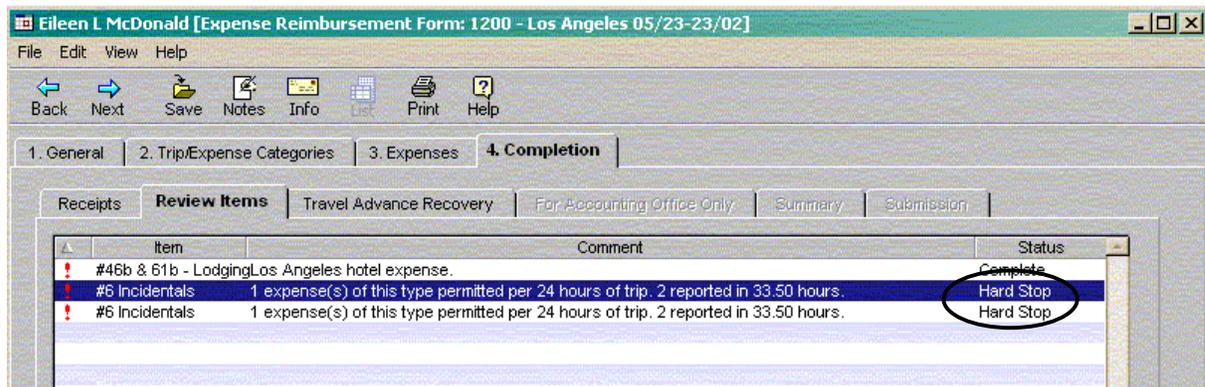
More than one incidental claimed in less than a 24-hour period.



Lodging without a receipt.



If expenses are clicked and dragged on the Expense grid, and a rule is violated, employees will encounter Hard Stop message at the **Review Items** screen. At that time, they will not be able to move forward through the claim until they return to tab **3. Expenses** and correct the expense that is causing the Hard Stop message(s).



I. Sign In to CalATERS

Logon As (continued)

Simulate Actions on Forms:

Adding a Trip

If the employee is having trouble adding a trip to the claim, the Help Desk can walk the employee through the steps of adding the trip. **Note:** Any information the Help Desk “adds” to the form will not be saved. Other simulations can be done as needed, for instance, adding expenses and completing expense fields, etc.

Steps:

- 1) Click the down arrow at the **Trip Selection** field. Select the type of trip.
- 2) Fields specific to the type of trip appear at the bottom of the screen. Complete fields and click **Add**.
- 3) The trip will be added to the **Applied Trips** list.

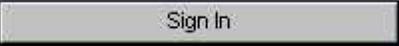
I. System Administration

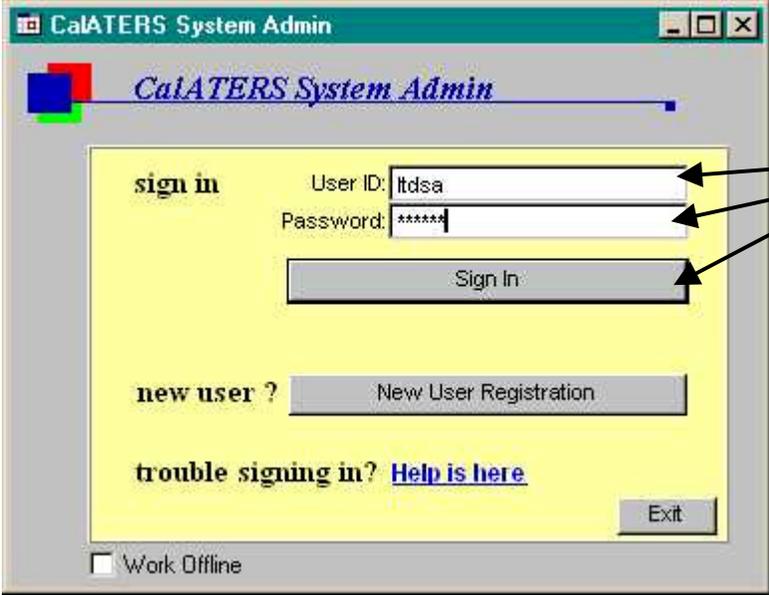
Access to CalATERS System Administration requires the **Travel Advance Administration** privilege, which is requested by your department and set up by the State Controller's Office, Central System Administrator.

This function will allow **Accounting Staff**, using the "Travel Advance Administration" privilege, to add, update and clear Travel Advances, which are available for recovery on Expense Reimbursement forms.

Click the **System Administration** button from the CalATERS web site.

At the **Sign In** screen, key your User ID and password.

Click the  button.

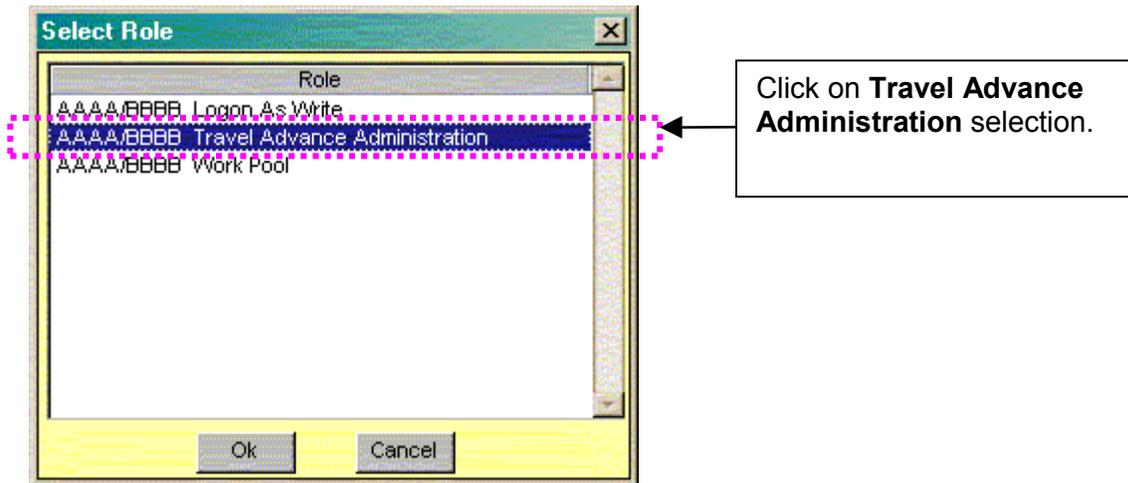


Key your **User ID** and **Password**.
Click Sign In.

Continued on next page.

II. System Administration (continued)

The **Select Role** screen displays. Click the **Travel Advance Administration** selection.



Click the  button.

The **Travel Advance Recovery** tab will display.



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III. Report Administration

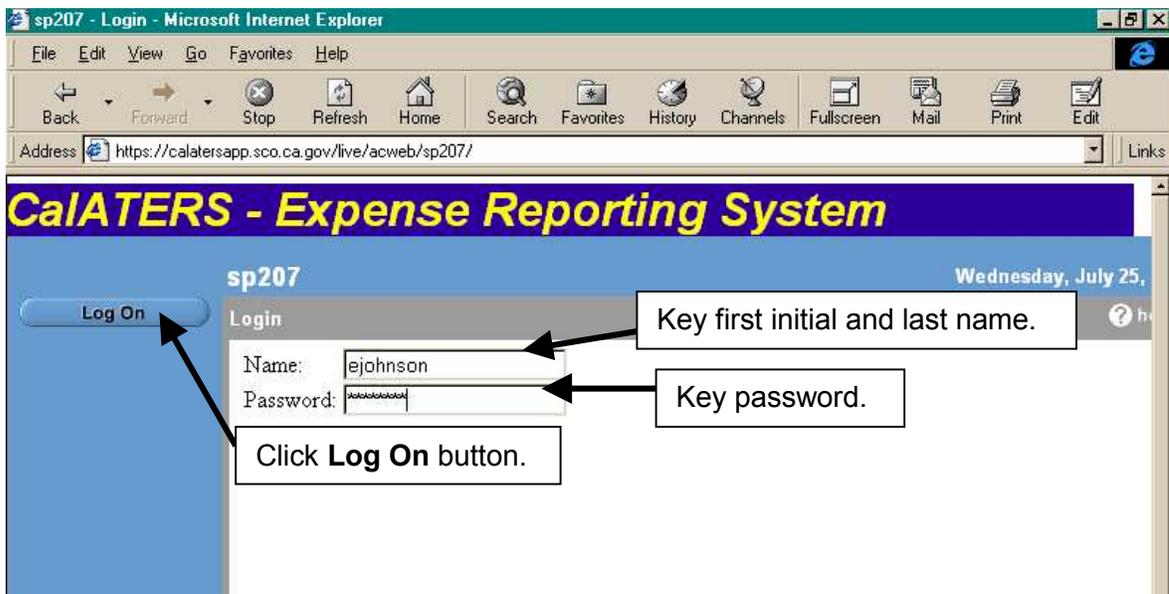
Access to CalATERS reports requires a privilege which is requested by your department and set up by the State Controller's Office, Central System Administrator.

This feature allows CalATERS reports to be viewed, printed and/or downloaded.

Click the  button from the CalATERS web site.

At the **Sign In** screen, in the **Name** field, key your first initial and last name (or the assigned user id if different). Key your password in the **Password** field.

Click the  button.

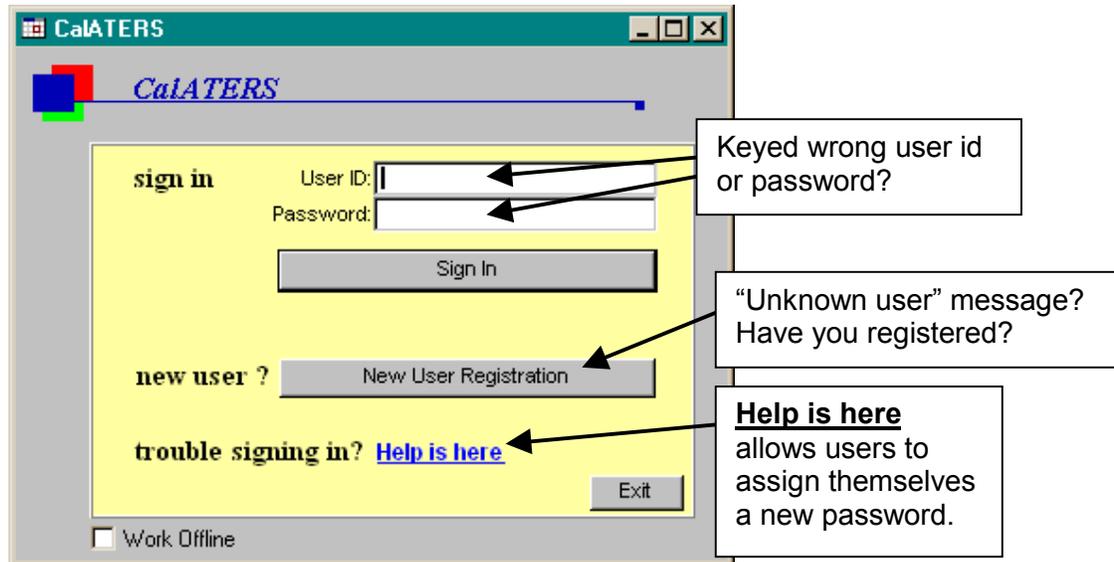


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IV. User ID/Password/Sign In Problems

This section addresses how to resolve user id and password problems that users encounter when they fail in attempts to sign in to CalATERS General and System Administration applications.

Problems with Reports Administration user ids and passwords must be resolved by the State Controller's Office, Central Help Desk.



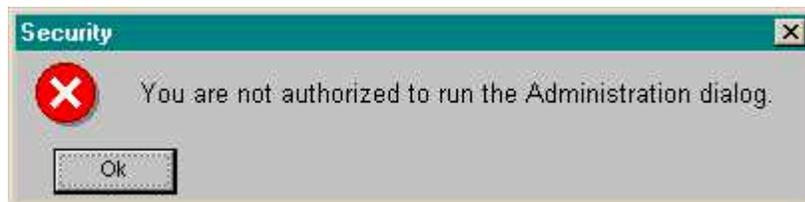
User ID Error Messages

“Invalid User!” error message:



This error message is received when an invalid User ID is keyed in the User ID field. This message also displays, when the user has not registered. Verify that the user has performed New User Registration. If they have, verify their User ID and attempt to have them sign in again. If the sign in attempt fails, check with your CalATERS System Administrator to verify the User ID is valid.

“You are not authorized to run the Administration dialog” error message:



The user is attempting to sign in to the CalATERS System Administration application and does not have the privileges to do so.

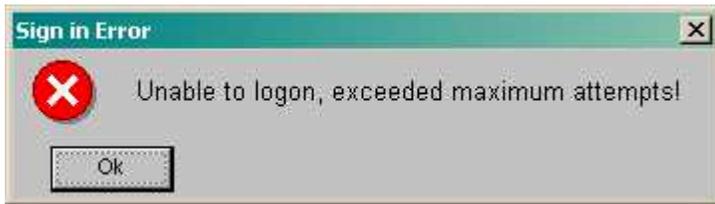
IV. User ID/Password/Sign In Problems (continued)

Invalid Password Error Messages

“Invalid password!” error message:



“Unable to logon, exceeded maximum attempts!” error message:

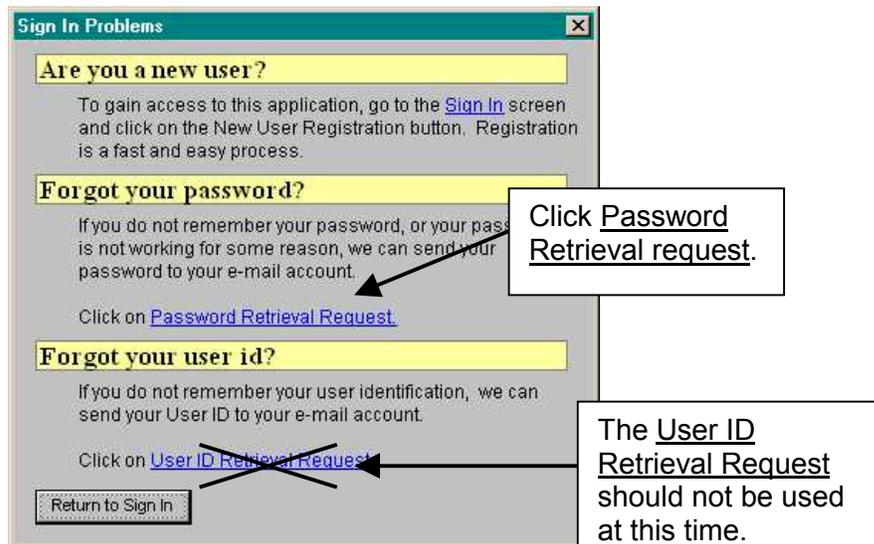


When a user fails in attempts to sign in to CalATERS because an invalid password was supplied more than five times, they should use the [Help is here](#) function to request a new password be sent to the email address specified in their Profile.

Using Help is Here

Click "[Help is here](#)" from the CalATERS sign in screen.

At the **Sign In Problems** screen, click [Password Retrieval Request](#).

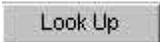


IMPORTANT: When making a Password Retrieval Request, the current password will become invalid and the system will assign a new password. The new password can be changed; see instructions in section **V. Change A Password**.

Continued on next page.

IV. User ID/Password/Sign In Problems (continued)

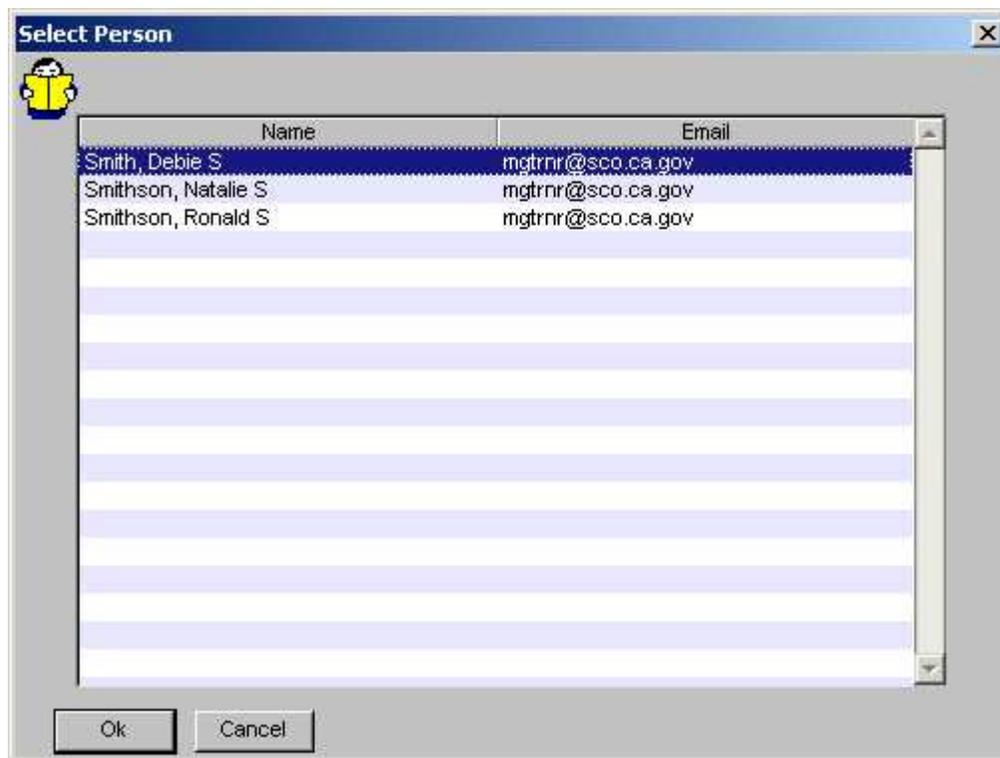
Using Help is Here (continued)

The **Password Retrieval Request** box appears. Key your last name and click the  button.



The dialog box titled "Password Retrieval Request" contains a cartoon character icon and the instruction "Enter your last name, then click 'Look Up' button." Below this is a text input field with "Smith" entered, a "Look Up" button, and "Ok" and "Cancel" buttons at the bottom.

The **Select Person** screen appears.



The dialog box titled "Select Person" contains a cartoon character icon and a table with two columns: "Name" and "Email". The table lists three entries: "Smith, Debbie S" with email "mgtrnr@sco.ca.gov", "Smithson, Natalie S" with email "mgtrnr@sco.ca.gov", and "Smithson, Ronald S" with email "mgtrnr@sco.ca.gov". The first entry is highlighted. "Ok" and "Cancel" buttons are at the bottom.

Name	Email
Smith, Debbie S	mgtrnr@sco.ca.gov
Smithson, Natalie S	mgtrnr@sco.ca.gov
Smithson, Ronald S	mgtrnr@sco.ca.gov

Click on your name and click . Click  again. The new password will be sent to the specified email address.

Password Not Received After New User Registration

If a user does not receive a password after new user registration, and making a **Password Retrieval Request** does not send a new password to the user, the email address specified in the user's **Profile** is incorrect.

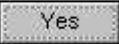
A Help Desk staff with "Logon As Write" authorization will need to sign in and correct the user's email address in the Profile. Once the email address is corrected, the user should make a **Password Retrieval Request**. The new password will be emailed to the user. See section I. **Sign In to CalATERS, Logon As**.

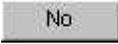
IV. User ID/Password/Sign In Problems (continued)

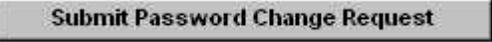
Password Expired

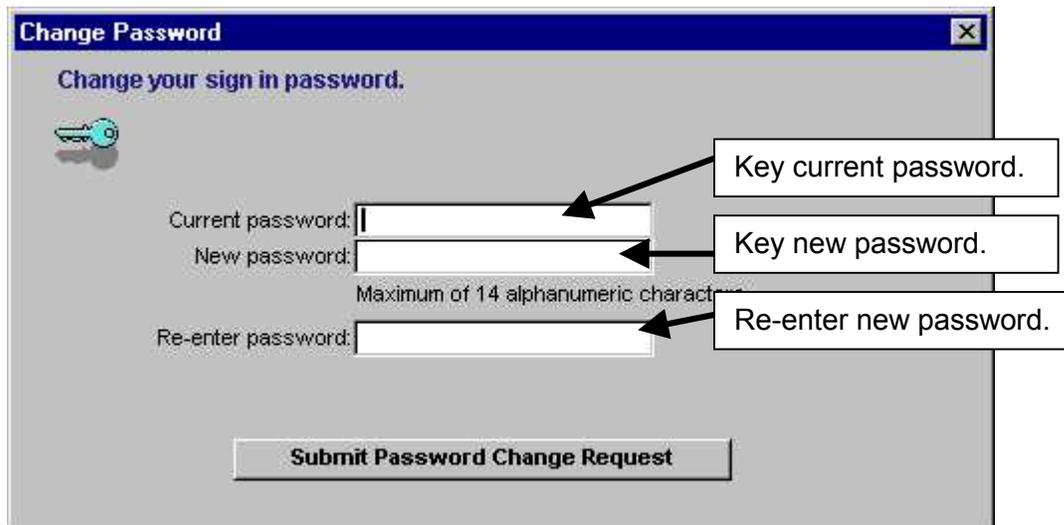
CalATERS passwords expire after 45 days. You will receive the “Your password has expired” message when attempting to sign in to CalATERS:



Click  to go to the **Change Password** screen.

If you click , you will exit the CalATERS application.

At the **Change Password** screen, key your current password, your new password and then re-enter your new password. Click the  button.



After the password change is submitted. Get a Sign In screen by doing one of the following:

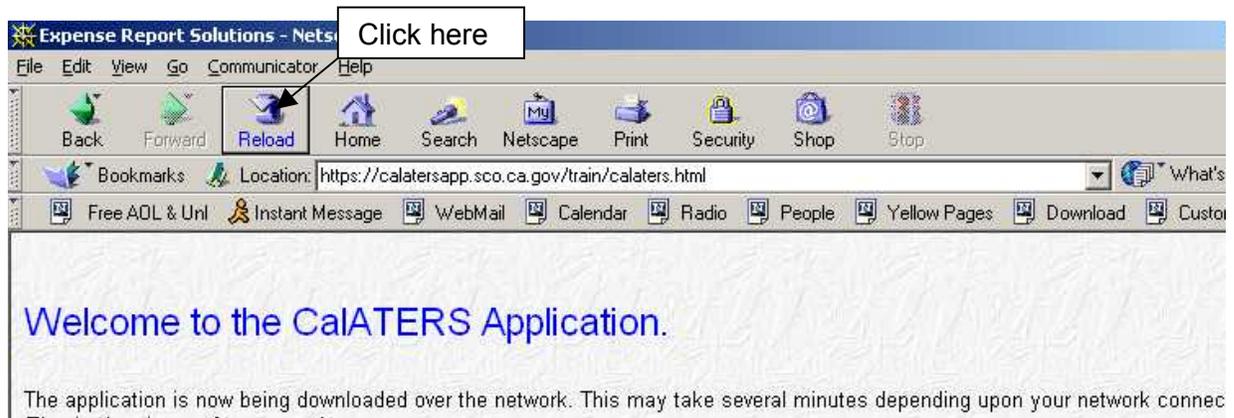
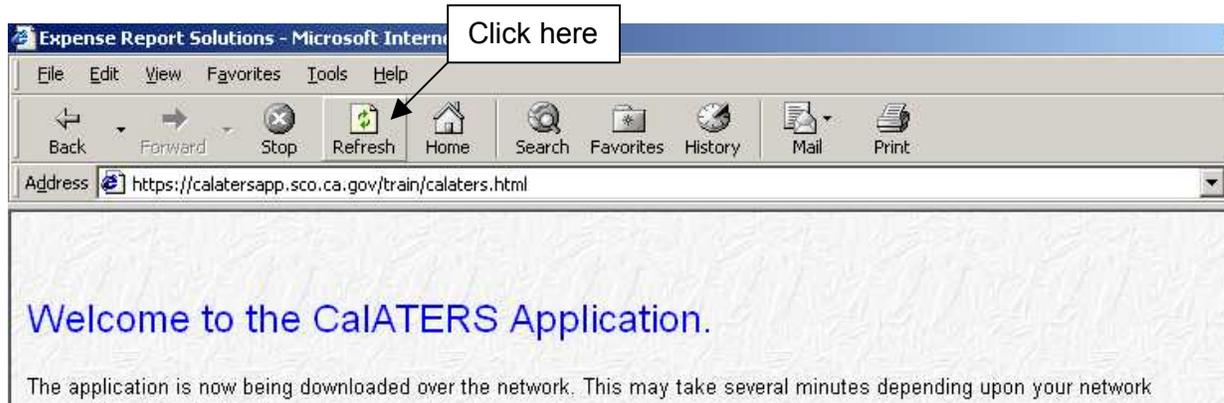
On **Internet Explore** - refresh the screen (click on the  Refresh icon or from the Menu Bar click on **View** then click **Refresh**.

On **Netscape** - reload the screen (click on the  Reload icon or from the Menu Bar click on **View** then click **Reload**.

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IV. User ID/Password/Sign In Problems (continued)

To get a Sign In screen, click on the Refresh or Reload icon.



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V. Change a Password

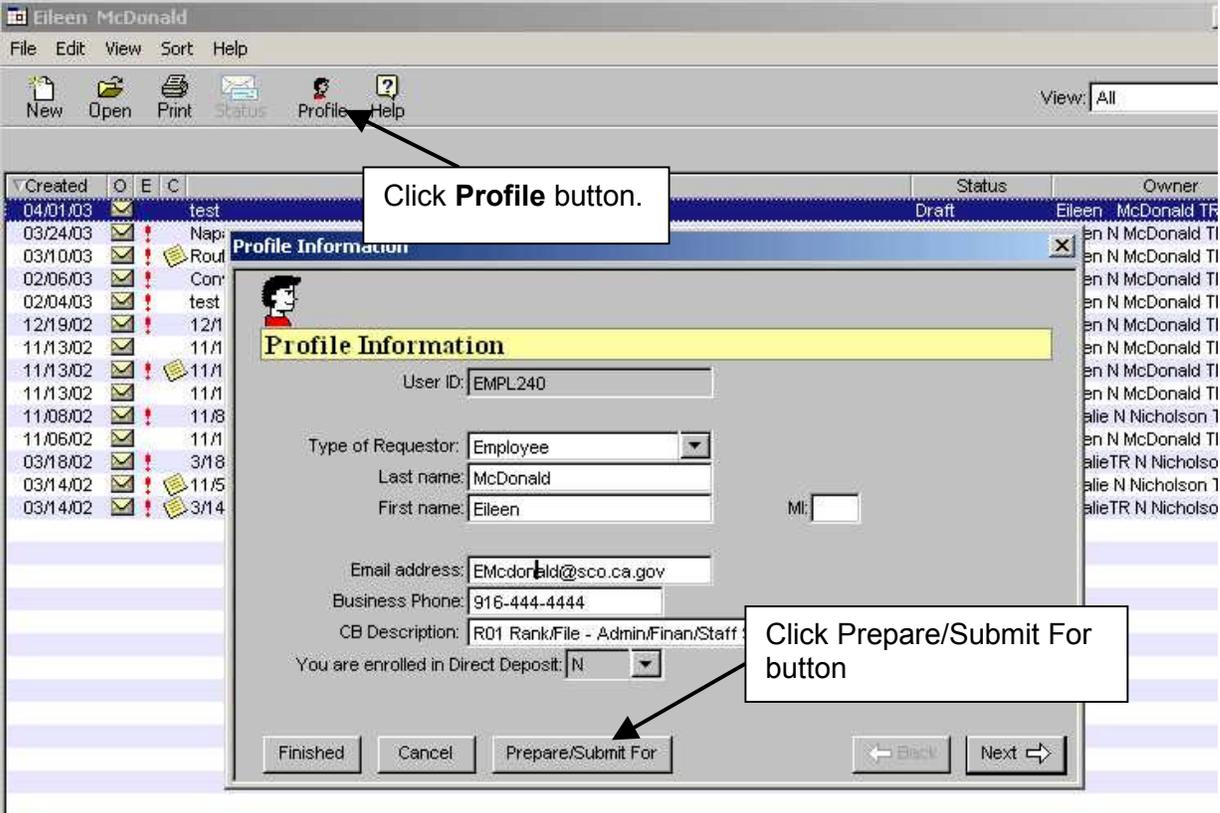
CalATERS General Sign In

For instructions on signing in to CalATERS, see section I. **Sign In to CalATERS.**

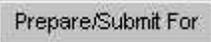
For instructions on changing passwords, refer to Update Your Profile or Change Your Password accessed from the CalATERS web site.

Employees, Approvers, Accounting Staff, etc. have the capability to change their own passwords while in the CalATERS application. The Help Desk does not have access to other user's passwords.

To change a password, click  **Profile** from the **Work Queue**. (Note: **Edit, Options** from the menu bar also allows you to change a password.)



The screenshot shows the CalATERS application interface. At the top, there is 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'. The 'Profile' button is highlighted with a callout box that says 'Click Profile button.' Below the toolbar is a table with columns for 'Created', 'O', 'E', 'C', 'Status', and 'Owner'. The table contains several rows of data. A 'Profile Information' dialog box is open in the foreground. The dialog box has a title bar with a user icon and the text 'Profile Information'. The dialog box contains the following fields: 'User ID: EMPL240', 'Type of Requestor: Employee', 'Last name: McDonald', 'First name: Eileen', 'MI: []', 'Email address: EMcdonald@sco.ca.gov', 'Business Phone: 916-444-4444', 'CB Description: R01 Rank/File - Admin/Finan/Staff', and 'You are enrolled in Direct Deposit: N'. At the bottom of the dialog box are four buttons: 'Finished', 'Cancel', 'Prepare/Submit For', and 'Next'. The 'Prepare/Submit For' button is highlighted with a callout box that says 'Click Prepare/Submit For button'.

Click the  button.

Continued on next page.

V. Change a Password (continued)

CalATERS General Sign In (continued)

At the **Options** screen, click the **Change Password** tab.

Options

Finished

Prepare for Submit for **Change password**

Change your sign in password.

Current password:

New password:

Maximum of 14 alphanumeric characters

Re-enter password:

Submit Password Change Request

Click on Change Password tab.

Key current password.

Key new password.

Re-enter new password.

Key the current password, the new password and re-enter the new password.

Click the **Submit Password Change Request** button. The password is changed.
No email is sent to the employee.

Click **Finished** to exit the **Options** screen.

Click **Finished** again to exit the **Profile**.

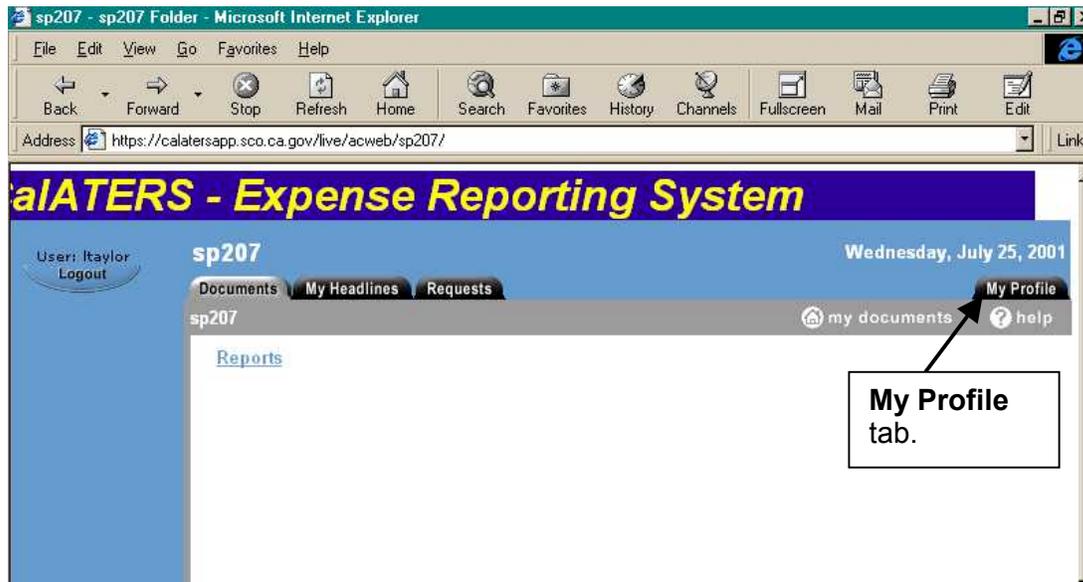
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V. Change a Password (continued)

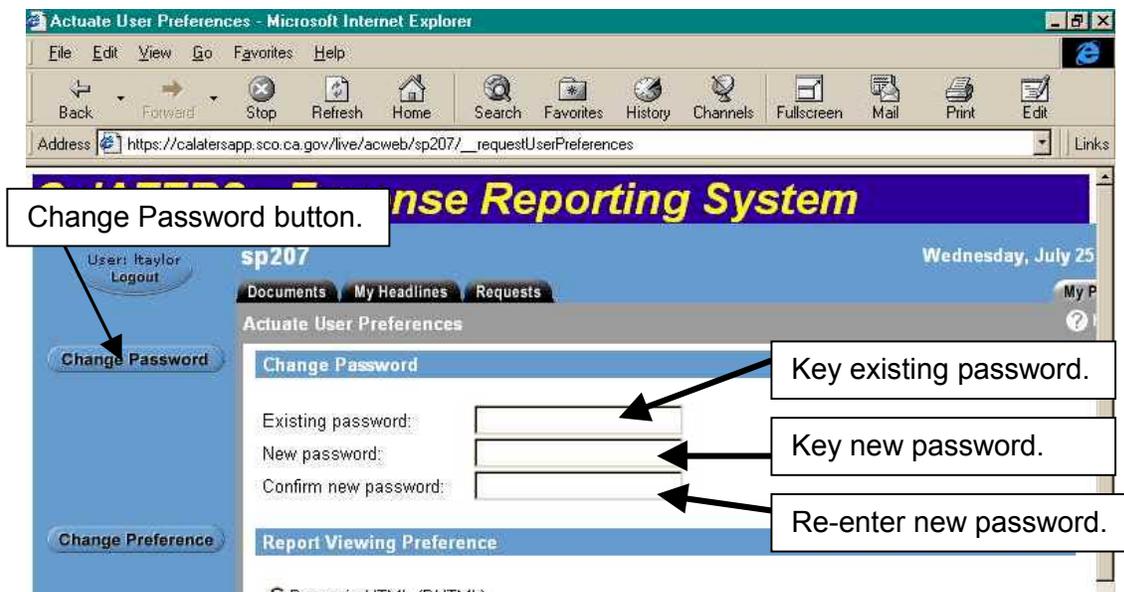
Reports Administration Sign In

For instructions on signing in to Reports Administration, see section III. **Reports Administration**.

To change a CalATERS Reports password, at the **Reports screen**, click the **My Profile** tab.



The **Change Password** screen displays. Key your existing password, new password and re-enter your new password. Click the **Change Password** button.



Continued on next page.

V. Change a Password (continued)

Reports Administration Sign In (continued)

The **Status** screen displays stating that the password change was successful.

Click the  button to exit CalATERS Reports or the  button to go back to the **Reports** screen.

