

Voyager PA Processes

HOW TO CREATE A NEW VOYAGER PA

- Sign into BASIS> UPS> Command: PA (Procurement Authorization)> Action: A (meaning to add)
- Fill out the *Employee ID*> *Vendor ID*> and *Effective Date* fields
 - o To look up an employee ID, click in the *Employee ID* field> F1> type employee's last name, comma, employee's first name>Enter
 - o Then you can choose from the list of names> double click the blank to the left of employee's name> then a window will pop up> double click the PF10 (Select This Emp) box> Enter
 - o To find the Vendor ID, click in the *Vendor ID* field> F1> Enter> Choose Voyager (double click the blank to the left of Voyager or click once and hit enter)
 - o Effective date should be today's date (date you are adding them)

```
UPOPA 1 PROD Procurement Authorization - PA 11/11/15 10:11
Command: [redacted] Action: A Req: [redacted] : [redacted] PO: [redacted] : [redacted] TA: [redacted]
Employee ID: 192389 Vendor ID: 208781-01-002 Effective Date: 11/11/2015
-----
Action: A Employee: 192389 Adonis Bwashi
BU: RAZT RazorTemp Program
Title: (Hourly Employee)
```

- Next you will fill in the *Tracking BU*> *Cost Center*> *Category*> and lastly the *PA Status*
- Check the Tracking BU to make sure it is the BU/Departmental code that you want the Voyager charges to route to for review and approval; it may be different than the employee's BU
- Enter the Cost Center and Category for charges to default
- After the information is entered correctly and you have double checked that the Effective Date is today> Enter> F10 (to save)

```
----- Approved:
Tracking BU: [redacted]
Monthly Credit Limit: [redacted]
Single Transaction Limit: [redacted] PA Status: [redacted]
Number of Transactions per day: [redacted]
===== Default Expensing =====
Company Cost Center: 0000 00000-00-0000 Category: [redacted] Project: [redacted]
```

- After you have finished the steps above, PA will route to the department for approval, and once it is approved it will automatically route to the eBusiness/PCard Administrator to be set up

- Once the eBusiness administrator completes their process, the employee will receive an automated email with instructions

HOW TO CLOSE/CANCEL A VOYAGER PA

- Follow the steps above to pull up an employee's Voyager PA
- Be sure to double check that the *Effective Date* field has today's date (the date you are updating it)
- For this process, update the *PA Status* field to an "X" for cancelled
- Once you have changed the PA Status and double checked that the Effective Date is today, you may press Enter> F10
- After you have finished the steps above, PA will route to the department for approval, and once it is approved it will automatically route to the eBusiness/PCard Administrator to be cancelled

HOW TO UPDATE DEPARTMENT/BU CODE ON A VOYAGER PA

- Follow the steps above to pull up an employee's Voyager PA
- Be sure to double check that the *Effective Date* field has today's date (the date you are updating it)
- For this process, the only field you need to update is the *Tracking BU* field with the correct Departmental/BU code you want the purchases to route to
- Once you have changed the Tracking BU and double checked that the Effective Date is today, you may press Enter> F10
- After you have finished the steps above, PA will route to the department for approval, and once it is approved it will automatically route to the eBusiness/PCard Administrator to be updated