



Approving Documents

Approvers review travel documents, ensuring that:

- The document is within travel policy.
- The correct accounts have been selected to fund the travel expenses. Funds Managers will add the accounting lines (POET) during the approval process.
- For authorizations, approvers also verify that the expenses are correctly estimated, reimbursement types are correct, estimated expenses have been properly split between funds, and reservations are within policy.
- For group and open authorizations, approvers also verify that the specific limitations are correct.

See the other *Approving...* user guides for more detailed information on approving a specific document.

E2 provides access to approver functions through the **My Approvals** tab on the task bar.

1. Click **My Approvals**. The default Pending Approvals list shows all travel documents that are assigned to you for approval.



Figure 1: My Approvals – Pending Approvals tab

2. (Optional) To view a list other than the default, click the **Filter Options** tab. This displays the Filter Options section. Select your search criteria, and then click **Apply Filter**.

3. Locate the document in the list.
4. Click the document's **Show** link. This displays the Summary page for that document. This view of the document is very similar to what the traveler sees when creating the document.

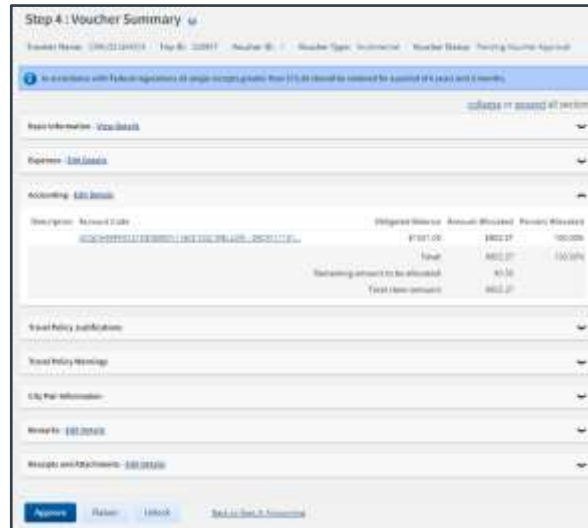


Figure 2: Voucher Summary page for an approver

5. Ensure the document is locked to you.
 - The document is locked if the **Unlock** link is listed in the Other Actions section.
 - If the **Lock** link is listed in the Other Actions section, the document is not currently locked to any approver. Click **Lock** to continue.
6. Use the Summary page to review each section of the document.
 - If you need to see additional information or make changes to a section, click the **View Details** or **Edit Details** link for that section.
 - Click the **Printable Profile** link in the Extras section to view or print selected information from the traveler's profile.
7. Approve, return, or unlock the document.
 - **Approve** – Click **Approve**, and then click **Confirm**. In the case of warnings or errors that result in

approval failure, contact your agency's financial system help desk for assistance.

- **Return for revision**
 - a. Click **Return**, which displays the Confirm Action window.
 - b. **Return To** – If available, select the person or group (i.e., traveler/owner or prior approver) to whom you are returning the document.
 - c. **Reason** – Select the reason you are returning the document.
 - d. **Remarks** – Enter any necessary remarks.
 - e. Click **Confirm**.
- **Unlock** – Click **Unlock** to make the document available to another approver.

Viewing Other Trip-Related Documents

Dashboards are available for:

- Group authorizations
- Open authorizations
- Trips

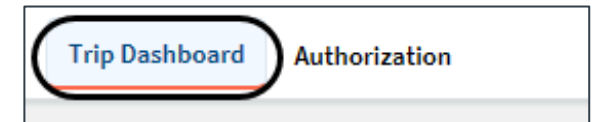


Figure 3: Trip Dashboard and Authorization tabs

A dashboard displays a summary of all related documents, including their status. For example, the Trip Dashboard provides information about authorizations, comparative trips, vouchers, advances, and reservations for a specific trip.

To view a document, click the document's **Show** link on the dashboard.

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