



USCG UG30: Approving Authorizations

Reviewing and Approving Travel Requests
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1 Introduction

This document contains information regarding the trip authorization process for E2 Solutions users utilizing both Federal Travel Regulations (FTR) and Joint Travel Regulations (JTR). Features and options specific to JTR functionality will be indicated when possible.

1.1 Understanding the Approval Process

In E2 Solutions (E2), an authorization is a request to travel. There are several types of authorizations, outlined in the following table. This user guide covers the approval process for all single (trip-by-trip) authorizations (including dependent travel), authorizations created under an open or group authorization, and amended authorizations.

Authorization Type	Approval Process
Trip-by-Trip	Requires approval
Open (Blanket) Authorization	Requires approval
Group Authorization	Requires approval
Trip Under an Open or Group Authorization	Requires no additional approval unless the trip exceeds the limitations defined within the open (OA) or group authorization (GA), or some portion of the trip is outside of normal travel policy
Dependent Travel	<p>Single travel requests require approval</p> <p>Requests to travel under an open authorization require no additional approval unless the trip exceeds the limitations defined within the OA, or some portion of the trip is outside of normal travel policy</p>

1.1.1 Routing Pools

As an approver, you are assigned to one or more routing pools. Routing pools may include a primary approver, who is automatically assigned to approve all documents within the pool. If a routing pool does not have a primary approver, E2 makes the document available to all approvers in the pool until an approver takes action on the document (i.e., approves or returns for revision). The Funds Manager and AO pools have been created without a primary approver designated.

1.1.2 Routing Rules

Travel policy managers configure sets of rules that define when an authorization, voucher, or travel advance request (collectively known as a trip) requires approval. These rules are known as routing rules. Routing rules specify the approval event triggers, the approval action required, and the pool of approvers (routing pool) authorized to perform the approval process.

Authorizations and other travel documents are dynamically routed through these sets of rules; approvals may occur at multiple levels within the management hierarchy. These rule sets may be simple or complex, static or frequently changed. Routing rules can be applied to all travelers in an office or unit, or to individual travelers.

Most authorizations will first route to the unit's Funds Manager routing pool and then to the unit's AO pool. If the document triggers a high-risk situation (e.g., traveler requesting premium class

airfare), the document will also be routed to an approver pool within PPC. Smaller units or offices may only have one level of approval.

1.2 Approver Actions

When a document enters the approval process, E2 analyzes the routing rules and determines whether a rule triggers an approval event. If an approval event is triggered, E2 assigns the document to the appropriate approver, or pool of approvers, for action. E2 notifies you via email when there is a document assigned to you for approval.

Approvers review travel requests, ensuring that:

- The authorization is within travel policy
- Expenses are correctly estimated
- Reimbursement types are correct
- The correct account codes (POET) have been selected to fund the travel

NOTE: *The Funds Manager approver is typically the first-level approver and will be the one to add the accounting codes (POET) to fund the trip. If accounting codes are not added by the Funds Manager, any other approver can add the POET lines.*

- Estimated expenses have been properly added
- Reservations are within travel policy or, if outside of policy, the justifications are appropriate

If the authorization is within guidelines, or properly justified if outside of guidelines, you can approve the authorization. Depending on the individual travel request and the applicable routing rules, the authorization will then route to the AO-level routing pool. If the authorization triggers a high-risk situation (e.g., traveler booked premium class airfare), the document will also route to a PPC group for approval. If you are the AO approver, you will typically be the final approver for a travel request and the traveler is notified that their trip has been approved. If the traveler has included their supervisor's email address in their E2 user profile, the supervisor will receive the same emails as the traveler during the approval process.

Once a trip has been approved, tickets can be issued and travel may now occur. The funding information for the trip will be automatically sent to the TMC, and the traveler's tickets will be issued approximately three days prior to the trip, unless the fare requires ticketing to be sooner.

1.2.1 Changing Travel Requests

As an approver you can also take other actions, including making limited changes to a travel request. Approvers can:

- Select a different reimbursement type for lodging or meals and incidental expenses (M&IE)
- Select a subtype for a privately owned vehicle expense
- Add or adjust account codes (POET) and allocations

If there are problems with the authorization that prevent your approval and that you cannot change, you can return the authorization to the traveler, or a prior approver, for revision.

2 Opening a Travel Authorization Pending Your Approval

E2 provides access to approver functions through the **My Approvals** option on the task bar. Complete the following steps to get started with the approval process.

1. Click **My Approvals** on the task bar. This displays the Pending Approvals page, which lists all documents that are assigned to you for approval (i.e., pending your approval).

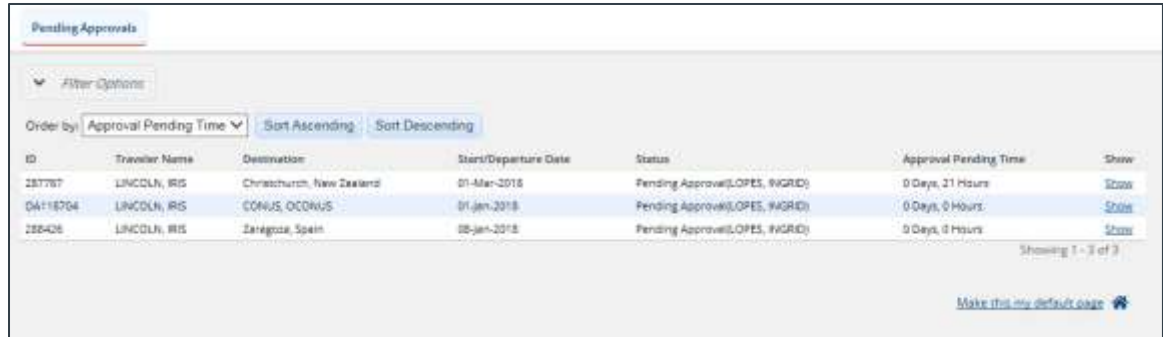


Figure 1: My Approvals — Pending Approvals tab

2. If necessary, use the Filter Options section to filter the list or view a list other than the default.
 - a. Click the **Filter Options** tab to expand the section and view the filter options available for that page.



Figure 2: Pending Approvals — Filter Options

- b. Select *Documents pending your approval* from the **List to View** drop-down list. This option is the default for the field and the focus of this user guide.
 - c. Select *Travel Authorization* from the **Document Type** drop-down list.
 - d. Enter any additional filtering criteria (e.g., traveler name, routing pool name) to limit the number of search results returned.
 - e. Click **Apply Filter** to generate a new list matching your search criteria.
3. Locate the authorization in the search results.
 4. Click the **Show** link. This displays the authorization's Summary page, a view that is very similar to what the traveler sees when creating the travel request.

NOTE: By default, all sections of the Summary page are expanded.

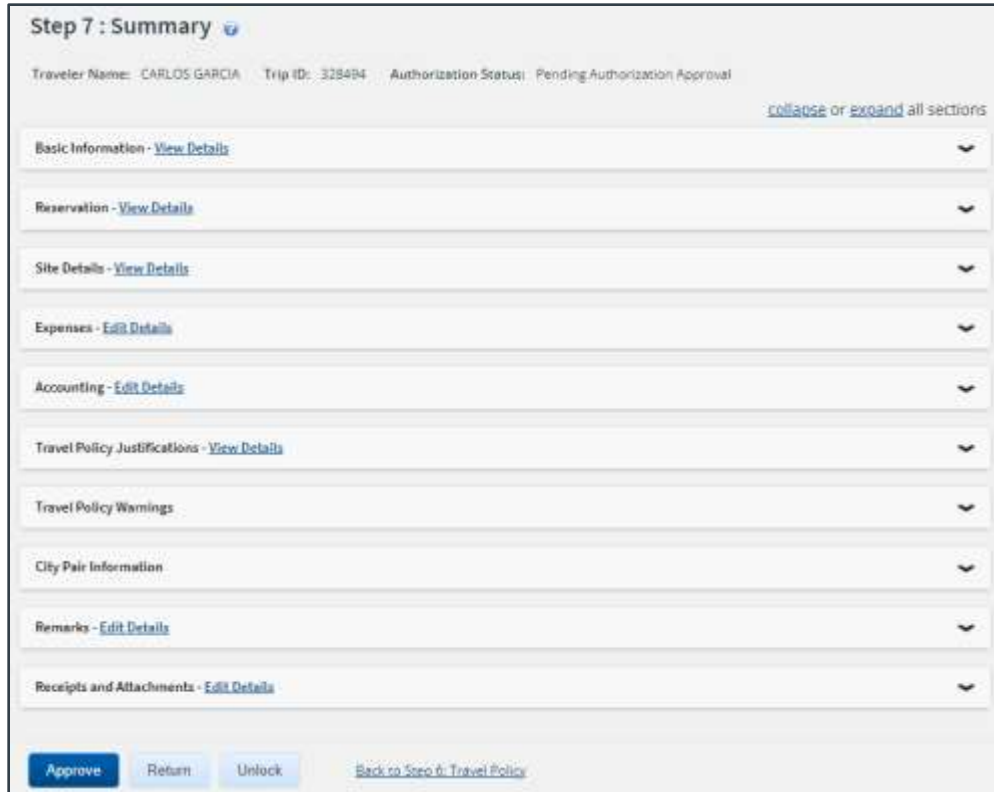


Figure 3: Authorization — Summary page

5. Verify the authorization is [locked](#) to you.
6. Use the Summary page to review the authorization. If you need to see additional information or make changes to a section, click the **View Details** or **Edit Details** link for that section. Be sure to save your changes.
7. Return to the Summary page when you are done making changes to a section.

2.1 Lock the Authorization

Locking an authorization reserves the document for you and prevents other users from taking actions on the document while you are working on it. You cannot approve an authorization (or take any other action) unless it is locked.

If you are the primary approver in your routing pool, the authorization is typically assigned to you for approval, and it should already be locked when you open it. The authorization is locked to you if the **Unlock** link displays in the Other Actions section, and the **Unlock** button appears at the bottom of the page.

Since the Funds Manager and AO routing pools will not have a primary approver designated, you will need to lock the document for your use, allowing you to take additional actions. A **Lock** link displayed in the Other Actions section and the **Lock** button at the bottom of the Summary page indicate the document is not currently locked to any approver. Click the **Lock** link (or **Lock** button) to continue.

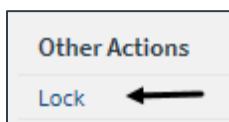


Figure 4: Lock link

3 Summary Page and Workflow Steps

The Summary page displays an overview of the trip authorization. Use the **View Details** or **Edit Details** link in each section to see more information or make changes.

3.1 Reviewing Basic Information

General information about the travel request displays in the Basic Information section on the Summary page. This information includes type of travel, specific travel purpose, and document number.

Basic Information - [View Details](#)

Type of Travel: Site Visit

Specific Travel Purpose: Cardiff Site Visit

Document Number: TWMNR0000287723T

Figure 5: Authorization Summary — Basic Information section

3.2 Reviewing Reservations

General information about the authorization's travel reservations displays in the Reservation section on the Summary page. If applicable, this information may include air, car, rail, hotel, and ticket data.

Reservation - [View Details](#)

Confirmation Number: EFZRGM

Air

Departure Date	From	To	Fare Type	Cabin Class	Flight #	Vendor	Last Update	Vendor Confirmation
Sunday, June 24, 2018 06:20pm	IAD/Dulles International (IAD)	LHR/Heathrow (LHR)	-DG	ECONOMY	918	United Airlines	Thursday, January 25, 2018	NSC0YW
Saturday, June 30, 2018 07:30am	LHR/Heathrow (LHR)	IAD/Dulles International (IAD)	-DG	ECONOMY	123	United Airlines	Thursday, January 25, 2018	NSC0YW

Fare Type: | YCA: Govt contract fare | -CA: Govt contract fare limited availability | -CB: Govt contract fare business class | -DG: Govt non-contract fare limited availability | REF: Refundable fare | NRF: Non-refundable fare

Car

Pick-up	Pick-up Location	Drop-off	Drop-off Location	Vendor	Vendor Confirmation
Monday, June 25, 2018 07:00am	LHR London Heathrow (LHR)	Saturday, June 30, 2018 07:00am	LHR London Heathrow (LHR)	Hertz	H5572406829 (ZE)

Hotel

Checkin Date	Checkout Date	Address	Vendor	Vendor Confirmation
Monday, June 25, 2018 02:00pm	Saturday, June 30, 2018 11:00am	Holiday Inn Exp Leeds	Holiday Inn	61713463

Ticket Data

No ticket data available.

Figure 6: Authorization Summary — Reservation section

3.3 Reviewing Site Details

General information about the travel and trip per diem locations displays in the Site Details section on the Summary page. Review the information provided and verify that it is accurate.


Click the **Expand** () indicator for each site section to view that site's details.



Figure 7: Authorization Summary — Site Details section

3.4 Reviewing Expenses

Estimated expenses added by the traveler display in the Expenses section on the authorization's Summary page.

If there is an associated reservation, certain expenses (e.g., airfare, rail, lodging, rental car, and estimated TMC fees) are generated from reservation information. If there is no associated reservation, lodging rates, as well as meals and incidental expenses (M&IE), are based on the per diem rates for the trip sites. You should review the expense information, and verify that it is accurate and that the estimated expenses are within travel policy guidelines.

Click the **Show** link next to a line item to view additional details about that expense.



Figure 8: Authorization Summary — Expenses section

3.4.1 Modifying Expenses

An approver’s primary responsibility is to review the authorization. There are limited changes that can be made to expenses by the approver, if necessary, or you can return the document to the traveler to have them make the revisions. If you need to make changes to an expense, click the **Edit Details** link in the Expenses section on the Summary page. This displays the authorization's Expenses page.

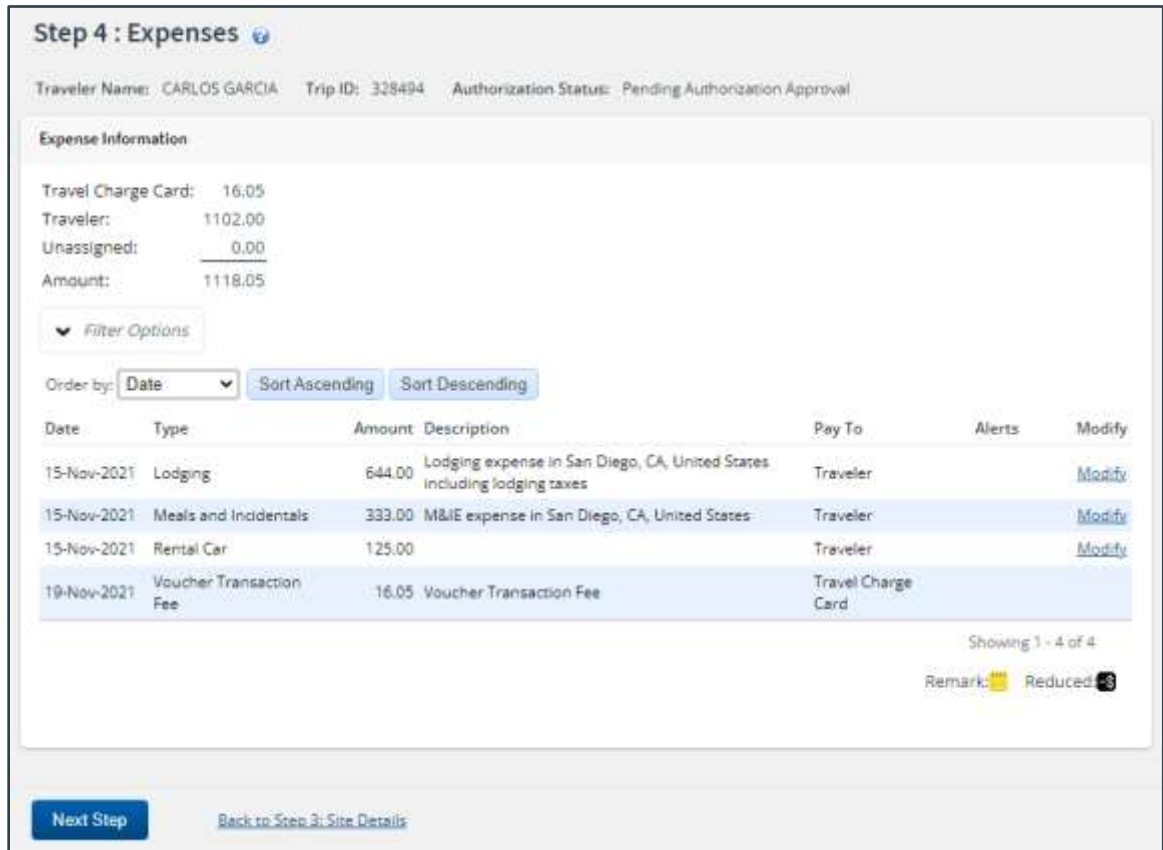






Figure 9: Authorization Expenses page

- Click a **Modify** link to edit the corresponding expense. (Be sure to save your changes.)
- Click a **Show** link to view the details of the corresponding expense. (This link displays when you are not permitted to update the information.)
- If an expense has an associated attachment or remarks, an icon displays in the Alerts column.

Icon	Description
	Indicates there is an attachment associated with the line item
	Indicates there is a remark associated with the line item
	Indicates foreign currency is associated with the line item
	Indicates an expense that has been reduced

3.4.2 Reviewing Lodging Expense Information

Use the Lodging Expenses window to view and verify lodging expense details for each site. The Notes column includes IDL information, as well as whether variable per diem rates apply to the applied percentage of standard per diem rates.

Click the **Modify** link for a lodging expenses to display the Lodging Expenses window.

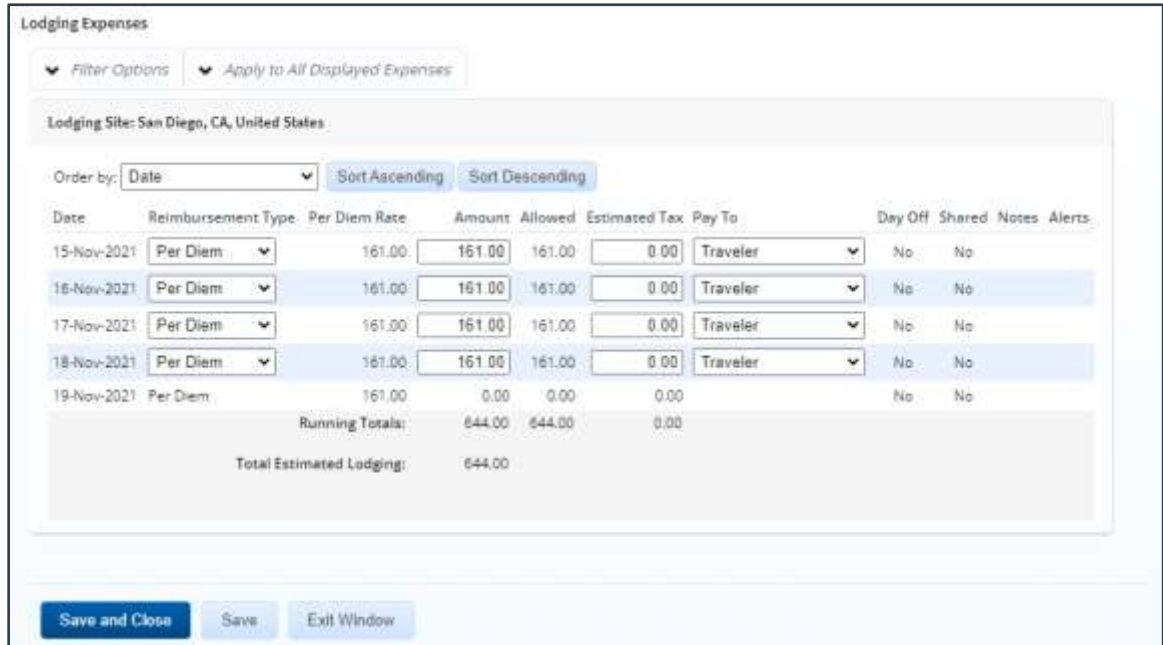


Figure 10: Lodging Expenses — CONUS site

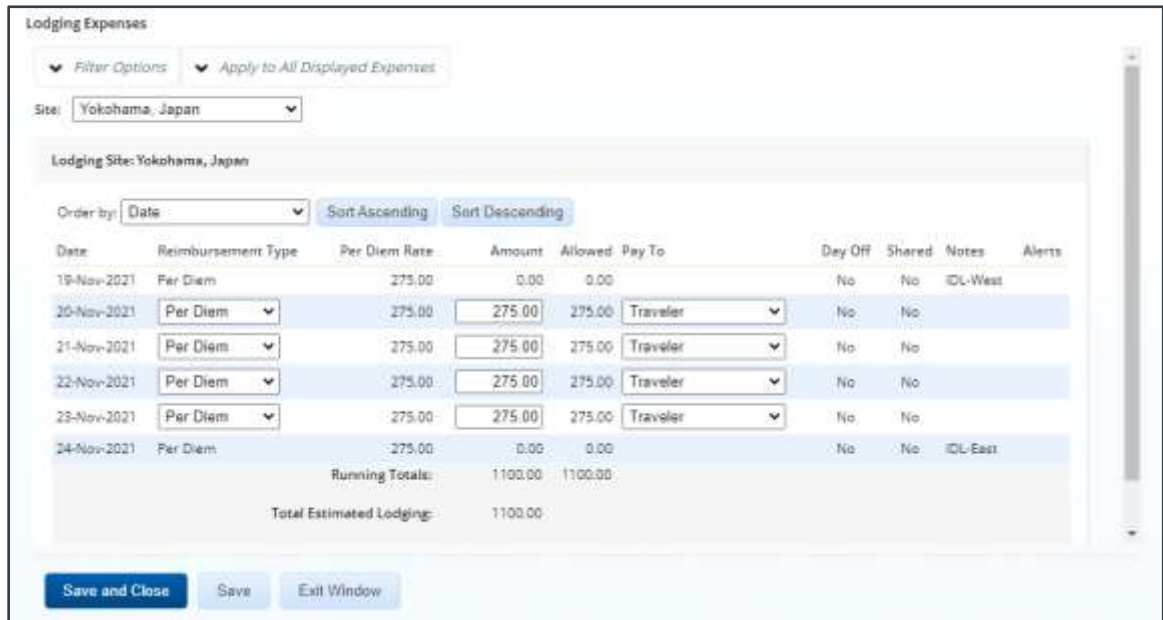


Figure 11: Lodging Expenses — OCONUS site

3.4.2.1 Lodging Reimbursement Types

Lodging reimbursement types can be different for each day, and are separate from M&IE reimbursement types.

- **Per Diem** – Rate based on the per diem location.

NOTE: Variable per diem lodging rates have been configured for trips that meet extended travel criteria. For example, variable per diem rates are applied to the trip when the traveler selects Evacuation or Evacuation Dependents from the **Type of Travel** drop-down list on the authorization’s Basic Information page. The Allowed amount reflects the variable per diem rate that applies, if any. The Notes column includes the keyword Variable followed by the percentage of the standard per diem amount for the site that applies to the day.

- **Actual** – Allowed amount must be less than or equal to the amount specified by the applicable travel policy.
- **Reduced** – Allowed amount must be less than the per diem amount.
- **No Expenses** – Allowed amount is zero. (This selection allows the traveler to create a trip with no expenses.)

3.4.2.2 Actual Reimbursement Maximum

When *Actual* has been selected from the **Reimbursement Type** drop-down list for at least one day in the Lodging Expenses window, the *Actual Reimbursement Maximum* text displays at the bottom of that window.

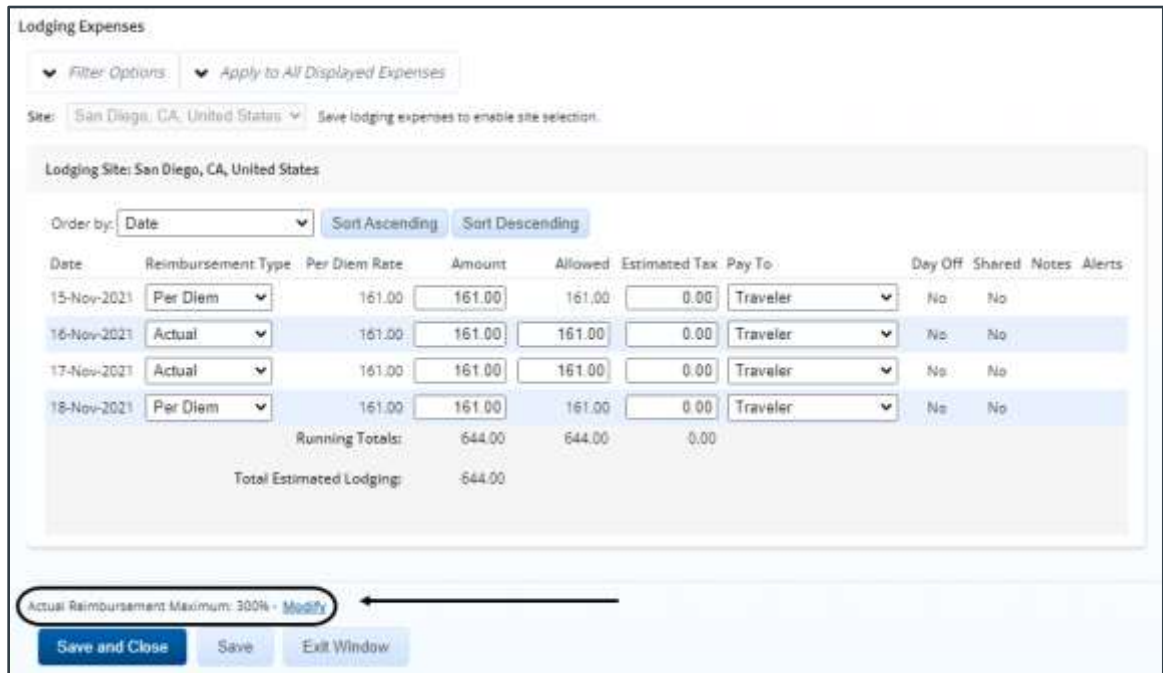


Figure 12: Lodging Expenses — Actual Reimbursement Maximum text

The number to the right of the text indicates the percentage by which actual lodging and meal expenses can exceed the per diem amount, as defined for your office or workgroup.

There may be scenarios, however, where the percentage allowed for actual expenses needs to be adjusted for a particular trip. Click the **Modify** link (to the right of the *Actual Reimbursement*

Maximum text) to display the Actual Reimbursement Maximum window, which allows you to edit the maximum percentage allowed.

Figure 13: Actual Reimbursement Maximum window

Enter the new percentage by which actual lodging and meal expenses can exceed the per diem amount in the **Actual Reimbursement Maximum Percent** field, and then click the **Save** or **Save and Close** button.

- You cannot go below 100, nor can you go above the maximum value of 300% of per diem.
- Any change made in this window is applicable to the current trip site only. If the trip includes multiple sites, you will need to repeat this adjustment and update the maximum percentage allowed at each site where a new value is appropriate.

TIP: If necessary, the maximum reimbursement percentage can be different for each individual site on a trip.

- Any change made in this window, regardless of how the window was accessed, applies to the maximum percentage allowed for BOTH lodging and M&IE.
- When you return to the Lodging Expenses window, the *Actual Reimbursement Maximum* text will be updated with the new percentage.

3.4.3 Reviewing Meals & Incidental Expenses (M&IE) Information

The Meals and Incidental Expenses window displays M&IE details for each site. Click the **Modify** link for a Meals and Incidentals expense to display the Meals and Incidental Expenses window.

Date	Reimbursement Type	Per Diem Meals	Per Diem Incidentals	M&IE Amount	Breakfast Provided	Lunch Provided	Dinner Provided	No Incidentals	Official Day Off	Pay To	Notes
15-Nov-2021	Per Diem	69.00	5.00	55.50	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No	Traveler	
16-Nov-2021	Per Diem	69.00	5.00	74.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No	Traveler	
17-Nov-2021	Per Diem	69.00	5.00	74.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No	Traveler	
18-Nov-2021	Per Diem	69.00	5.00	74.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No	Traveler	
				Total Estimated M&IE:	377.50						

Figure 14: Meals and Incidental Expenses window

3.4.3.1 **M&IE Reimbursement Types**

M&IE reimbursement types can be different for each day and are separate from lodging reimbursement types.

NOTE: The EUM, GMR/PMR, and Occasional Meals options are only available for JTR travelers. The Trip History page allows you to review the regulations (i.e., FTR or JTR) under which the trip was created.

- **Actual** — Select this option to reimburse the traveler for the actual meals and incidental expenses incurred on the corresponding day. When selected, the amount allowed in the **M&IE Amount** field must be less than or equal to the amount specified by the group's travel policy.
- **EUM** — Select this option to indicate essential unit messing (EUM) has been established for the corresponding day. When selected, the **M&IE Amount** field defaults to the local incidental per diem rate for that date, the **No Incidentals** check box is cleared and disabled, and the **Provided** check boxes are checked, [but remain enabled](#).
- **GMR/PMR** — Select this option to indicate the government meal rate (GMR) should be used to determine the reimbursement for the corresponding day. When selected, the **M&IE Amount** field defaults to the government meal rate (GMR) amount plus the local incidental per diem rate for that date; the **No Incidentals** check box is cleared and disabled; the **Provided** check boxes are checked, [but remain enabled](#); and the **Notes** field is set to *GMR*.
- **No Expenses** — Select this option to indicate no meal and incidental expenses may be incurred for the corresponding day. When selected, the **M&IE Amount** field defaults to zero (0.00).
- **Occasional Meals** — Select this option to indicate occasional meals have been authorized for the corresponding day. When selected, the permitted reimbursement amount is automatically calculated by E2, based on the appropriate [proportional meal rate \(PMR\)](#) for the travel site, and displayed in the **M&IE Amount** field. Additionally, the **Provided** check boxes are cleared and disabled, while the **No Incidentals** check box is checked and disabled.

NOTE: When approving an authorization for a trip that follows the JTR and is less than or equal to 12 hours, JTR travelers are allowed to specify the use of occasional meals. The **Reimbursement Type** field defaults to Per Diem with zero reimbursement, but you may select the Occasional Meals option and follow the appropriate regulations for that selection.

- **Per Diem** — Select this option to authorize reimbursement for the per diem amount applicable for the traveler's location. When selected, the expense cannot exceed this rate, unless travel policy allows the rate to be exceeded by a set percentage.

NOTE: The allowed amount displayed in the **M&IE Amount** field reflects any variable per diem rates that have been applied.

- **Reduced** — Select this option to authorize reimbursement for a reduced amount. When selected, the amount allowed in the **M&IE Amount** field must be less than the per diem amount.

3.4.3.2 **Actual Reimbursement Maximum**

When *Actual* has been selected from the **Reimbursement Type** drop-down list for at least one day in the Meals and Incidental Expenses window, the *Actual Reimbursement Maximum* text displays at the bottom of the window.

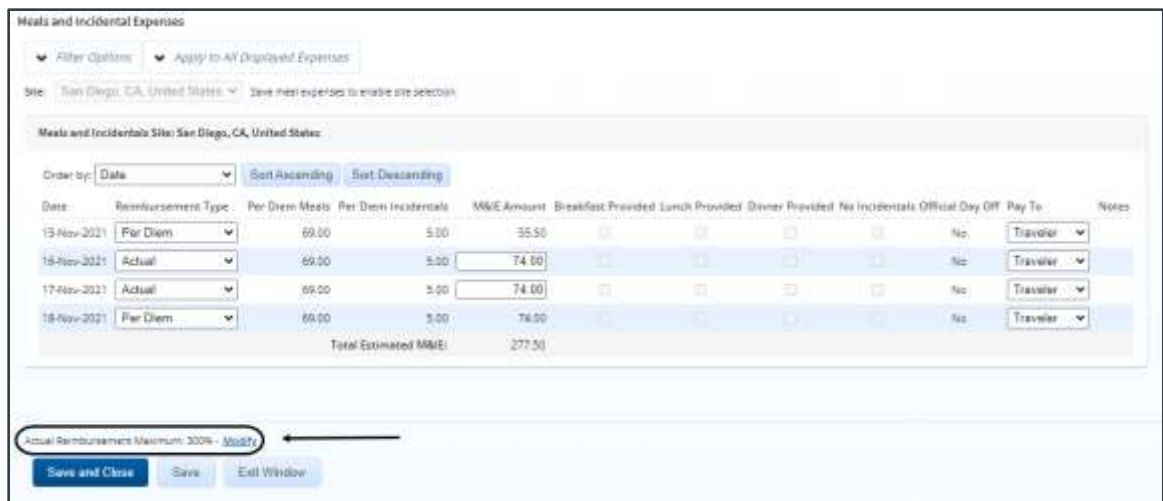


Figure 15: Meals and Incidental Expenses — Actual Reimbursement Maximum text

The number to the right of the text indicates the percentage by which actual lodging and meal expenses can exceed the per diem amount. There may be scenarios, however, where the percentage allowed for actual expenses needs to be adjusted for a particular trip. Click the **Modify** link (to the right of the *Actual Reimbursement Maximum* text) to display the Actual Reimbursement Maximum window, which allows you to edit the maximum percentage allowed.

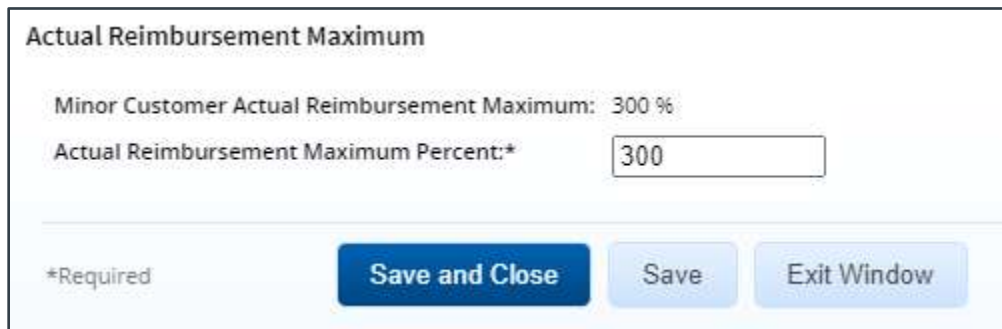


Figure 16: Actual Reimbursement Maximum window

Enter the new percentage by which actual lodging and meal expenses can exceed the per diem amount in the **Actual Reimbursement Maximum Percent** field, and then click the **Save** or **Save and Close** button.

- You cannot go below 100, nor can you go above the maximum value of 300% of per diem.
- Any change made in this window is applicable to the current trip site only. If the trip includes multiple sites, you will need to repeat this adjustment and update the maximum percentage allowed at each site where a new value is appropriate.

TIP: If necessary, the maximum reimbursement percentage can be different for each individual site on a trip.

- Any change made in this window, regardless of how the window was accessed, applies to the maximum percentage allowed for BOTH lodging and M&IE.
- When you return to the Meals and Incidental Expenses window, the *Actual Reimbursement Maximum* text will be updated with the new percentage.

3.4.3.3 **Reduced Incidental Amount [JTR]**

NOTE: The reduced incidental amount is a JTR-only travel policy item.

When *EUM* or *GMR/PMR* has been selected from the **Reimbursement Type** drop-down list for at least one day in the authorization’s Meals and Incidental Expenses window, the *Reduced Incidental Amount* text displays at the bottom of the window. The amount to the right of the text indicates the minimum incidental per diem rate allowed for the trip site.

The screenshot shows the 'Meals and Incidental Expenses' window. At the top, there are filter options and a location dropdown set to 'San Diego, CA, United States'. Below this is a table with columns: Date, Reimbursement Type, Per Diem Meals, Per Diem Incidentals, M&IE Amount, Breakfast Provided, Lunch Provided, Dinner Provided, No Incidentals, Official Day Off, Pay To, and Notes. Three rows are visible for dates 15-Nov-2021, 16-Nov-2021, and 17-Nov-2021. The 16-Nov-2021 row is highlighted and has 'EUM' selected in the Reimbursement Type dropdown. At the bottom of the window, the text 'Reduced Incidental Amount: 5.00 - Modify' is circled in red, with an arrow pointing to it. Below this text are buttons for 'Save and Close', 'Save', and 'Exit Window'.

Figure 17: Meals and Incidental Expenses — Reduced Incidental Amount text

There may be scenarios where you are required to reduce the amount of allowed incidentals, based on travel orders. Click the **Modify** link to display the Reduced Incidental Amount window, which allows you to edit the incidental amount allowed for the site.

The screenshot shows the 'Reduced Incidental Amount' window. It displays 'Locality Incidental Per Diem Rate: 5.00'. Below this is a text input field labeled 'Reduced Incidental Amount:*' containing the value '5.00'. At the bottom left, there is a note '*Required'. At the bottom right, there are three buttons: 'Save and Close', 'Save', and 'Exit Window'.

Figure 18: Reduced Incidental Amount window

Enter the new incidental amount in the **Reduced Incidental Amount** field (i.e., clear the existing entry from the field and then enter a new value), and then click the **Save** or **Save and Close** button.

- Any change made to this window is applicable to the current trip site only. If the trip includes multiple sites, you will need to repeat this adjustment and update the incidental amount at each site where a reduced value is appropriate.

TIP: If necessary, the incidental amount can be different for each individual site on a trip.

- When you return to the Meals and Incidental Expenses window, the **M&IE Amount** field (for those days set to *EUM* or *GMR/PMR*) and the *Reduced Incidental Amount* text are updated to reflect the new amount. Be sure to click the **Save** or **Save and Close** button in the Meals and Incidental Expenses window to ensure the updated M&IE amount is retained.

3.4.3.4 **Proportional Meal Rate [JTR]**

NOTE: *The proportional meal rate is a JTR-only travel policy item.*

The proportional meal rate (PMR) is the rate used when one or two government meals are provided at no cost to the traveler. The PMR is the average of the government meal rate (GMR) and the location's per diem rate.

PMR may be utilized for reimbursement when either the *EUM* or *GMR/PMR* option is selected from the **Reimbursement Type** drop-down list. When selected, both options default the **Breakfast Provided**, **Lunch Provided**, and **Dinner Provided** check boxes to checked. If one or more of the checked **Provided** check boxes is cleared, however, the **M&IE Amount** field for either reimbursement type defaults to the proportional meal rate (PMR) plus the local incidental per diem rate for the specific date, using current PMR calculations. When *GMR/PMR* is selected, the **Notes** field for the affected date is also changed from *GMR* to *PMR* to indicate the modification.

If you clear all three **Provided** check boxes, you are indicating that no meals are provided, in which case the traveler should be entitled to commercial meals (i.e., per diem). As you clear the last **Provided** check box, a warning message displays, prompting you to confirm the change to the Per Diem reimbursement type. If you click the **Cancel** button, the message window closes, the *EUM* or *GMR/PMR* reimbursement type is retained, and the last **Provided** check box you cleared is checked.

A similar error message displays after you use the Apply to All Displayed Expenses feature if it results in one or more days with a reimbursement type of *EUM* or *GMR/PMR* and all **Provided** check boxes unchecked. In this scenario, you must select *Per Diem* from the **Reimbursement Type** drop-down list for the corresponding day or check one of the **Provided** check boxes to continue.

3.4.4 **Modifying Private Auto Mileage Subtype**

All approvers are allowed to change the **Subtype** field for a privately owned vehicle (POV) expense when needed.

Complete the following steps.

1. Click the **Modify** link for the other expense you want to change. This displays the Edit Expense window.

Edit Expense - Privately Owned Vehicle for \$5.21 on 16-Nov-2021

Detail Remarks

Date of Expense: 16-Nov-2021

Expense: Privately Owned Vehicle

Subtype: ▼

Claimed Amount: 5.21

Amount:* 5.21

Remark:* [Add a Required Remark](#)

From:* 2920 Zoo Dr, San Diego, CA 92101, USA

To:* 5010 Newport Ave, San Diego, CA 92107, USA

Distance:* 9.3 miles x 0.56 = 5.21 USD

Pay To: ▼

Site of Expense: San Diego, CA, United States

*Required

Figure 19: Edit Expense — Privately Owned Vehicle expense

2. Select the appropriate subtype for the expense from the **Subtype** drop-down list. This selection impacts the mileage rate.
3. If method of reimbursement selection is required, review or change the value in the **Pay To** field. Available selections are limited by travel policy.
4. Click **Save and Close** to save your changes and close the Edit Expense window.

3.4.5 Reviewing "Pay To" Information for Estimated Expenses

The summary of estimated expenses, at the top of the Expenses section on the authorization's Summary page, is categorized by "pay to" selection. The **Pay To** field for each expense allows the traveler to indicate, on the authorization and voucher, how the expense will typically be paid and then reimbursed.

The **Pay To** field for Airfare, TMC Fee, and Voucher Transaction Fee expenses defaults to *Travel Charge Card*, the field defaults to *Traveler* for all other expense types. *Agency Billed* is also an option in the **Pay To** drop-down list, and can be selected if a trip's airfare is billed to the agency's CBA.

3.5 Reviewing Accounting

Trip accounting information displays in the Accounting section of the authorization's Summary page.

Before a travel authorization can receive final approval, the Funds Manager approver will need to add the lines of accounting (POET) to fund the trip. All approvers should always review the account code selection, and estimated expenses must be completely allocated prior to final authorization approval.

Description	Account Code	Obligated Balance	Amount Allocated	Percent Allocated
	UCGCH93PHQ21DEIGDEV01000 CG STEADY STATE TRAININ...	\$0.00	\$3030.26	100.00%
		Total:	\$3030.26	100.00%
		Remaining amount to be allocated:	\$0.00	
		Total claim amount:	\$3030.26	

Figure 20: Authorization Summary — Accounting section

Complete the following steps.

1. Review the accounts selected to fund the trip. If there are multiple accounts, verify that the total amount allocated covers all estimated expenses. Adjust the amount or percent allocated to each account, if necessary.
2. Click the **Edit Details** link to access the Accounting page.

Step 5 : Accounting

Traveler Name: CARLOS GARCIA Trip ID: 328494 Authorization Status: Pending Authorization Approval

POET will be added by Funds Manager. Travelers and Arrangers can click Save and Next step.

Accounting

Description	Account Code	Obligated Balance	Amount Allocated	Percent Allocated	Add to Favorites	Delete
	UCGCH93PHQ21DEIGDEV11403 CGC MELLON - DECK11101...	\$0.00	<input type="text" value="0.00"/>	<input type="text" value="0.00%"/>	Add	Delete
	UCGCH93PHQ21DEIGDEV11000 CG STEADY STATE TRAININ...	\$0.00	<input type="text" value="3030.26"/>	<input type="text" value="100.00%"/>	Add	Delete
		Total:	\$3030.26	100.00%		
		Remaining amount to be allocated:	\$0.00			
		Total claim amount:	\$3030.26			

[Select Account Codes](#)
[Split Funding](#)

[Save and Next Step](#) [Save](#) [Back to Step 4: Expenses](#)

Figure 21: Authorization Accounting page

- Click a **Delete** link to remove the corresponding account from the authorization or advance request.
- Click an **Add** link to save the corresponding account as a favorite.
- Click the **Select Account Codes** link to select accounts to fund the trip.
- Click the **Split Funding** link if you have multiple accounts to fund your trip, and you want to identify specific funding sources with specific expenses or travel dates.

NOTE: The Split Funding window will include an Accounting Balances panel that recaps the amount totals and "Pay To" divisions.

Split Funding For Travel Between 15-Nov-2021 and 24-Nov-2021

Accounting Balances					
Account Code	Obligated Balance	Amount Allocated	Pay To Trv	Pay To TCC	Pay To CBA
UCGCH93PHCV21DEIGDEV1000 CG STEADY STATE TRAININ...	\$0.00	\$3030.26	\$3014.21	\$16.05	\$0.00
UCGCH93PHCV21DEIGDEV11403 CGC MELLON - DECK11101...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$0.00	\$3030.26	\$3014.21	\$16.05	\$0.00

Split Funding By Expense Type					
Expense Type	Account Code	CBA	Amount	Detail	
Rental Car	\11403 CGC MELLON - DECK111010.LEAVE_AWARD	N	125.00	Detail	
Lodging	\11403 CGC MELLON - DECK111010.LEAVE_AWARD	N	1744.00	Detail	

Buttons: Save and Close, Save, Exit Window, Split By Expense Date

Figure 22: Split Funding — "Pay To" Enabled

3. Save your changes before exiting the page.

3.5.1 Select Account Codes from a Favorites List

Complete the following steps to select account codes for the authorization that have been saved to a favorites list.

1. On the authorization's Accounting page, click the **Select Accounts Codes** link. This displays the Account Code Selection window.

Account Code Selection				
Select	Source	Description	Account Code	Delete
<input type="checkbox"/>	Approver Profile		UCGCH93PHCV21DEIGDEV1000 CG STEADY STATE TRAINING\111001.REG PAY WAGEBOARD	Delete
<input type="checkbox"/>	Approver Profile		UCGCH93PHCV21DEIGDEV11403 CGC MELLON - DECK111010.LEAVE AWARD	Delete

Buttons: Select Account Codes, Add Account Codes, Select and Close, Select, Exit Window

Figure 23: Account Code Selection — Select Account Codes tab

2. Click the **Select** check box to the left of each code you want to use to fund the authorization.
3. Click **Select and Close** to save your selection(s), close the Account Code Selection window, and return to the authorization's Accounting page.

3.5.2 Add a Dimensional Account Code

Complete the following steps to add the POET line to the authorization.

1. On the Accounting page, click the **Select Account Codes** link. This displays the Account Code Selection window.
2. Click the **Add Account Codes** tab.
3. Enter segment values in each field for each field in the POET line, or click the **Search** button next to a field to select from a list of values in the Dimensional Accounting Code Search window. You can also enter one or more characters of the segment value or description in a field, and then click **Search** to limit the list to segment values and descriptions that start with the entered data.

TIP: To see information about a segment, including the maximum length, float the pointer over the segment field to view the associated hover text.

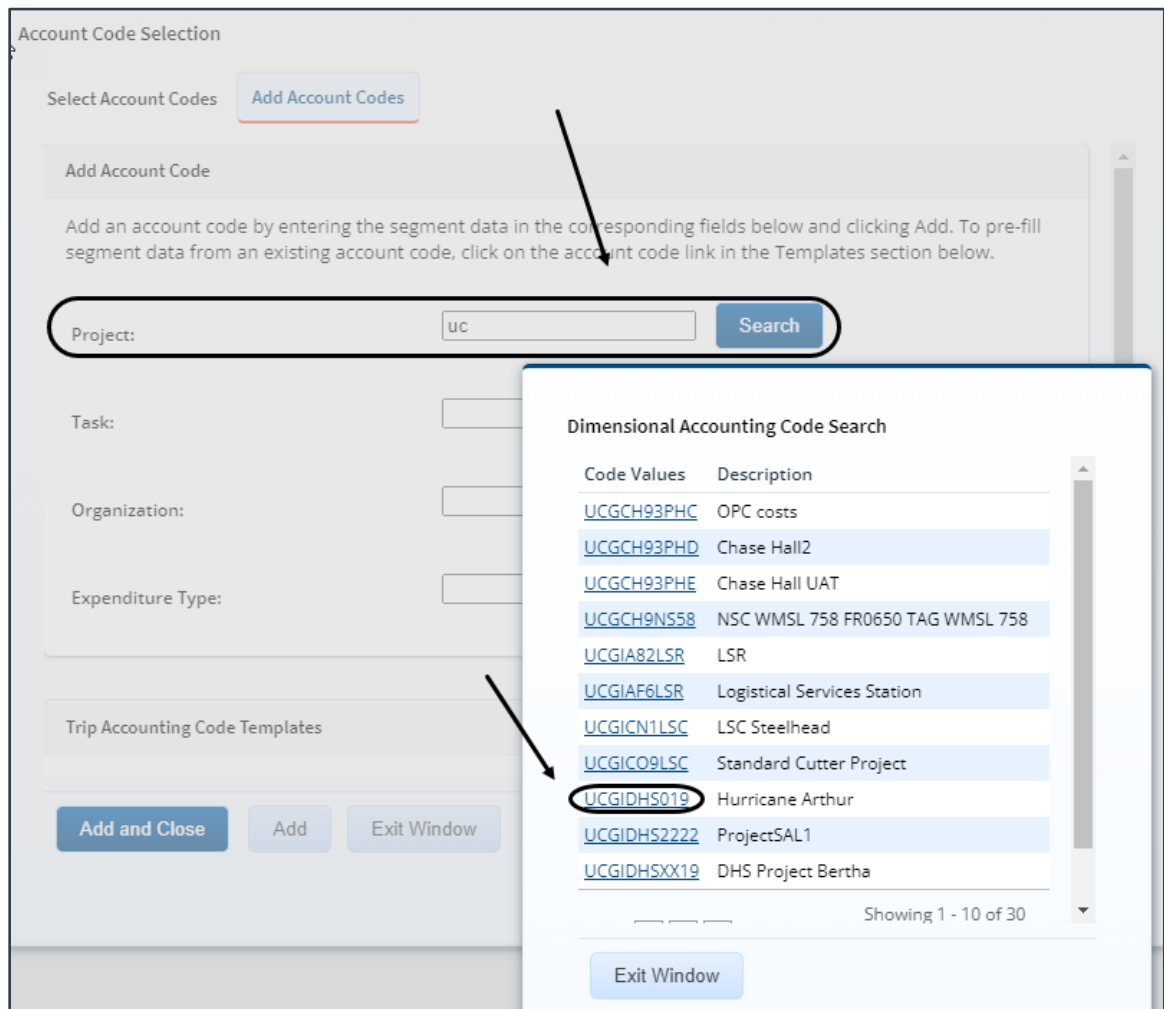


Figure 24: Dimensional Accounting Code Search

4. Select from the following options:
 - Click **Add and Close** to add the newly created dimensional account code to the authorization, close the Account Code Selection window, and return to the Accounting page.
 - Click **Add** to add the new dimensional account code to the authorization, but clear the fields and leave the Account Code Selection window open, allowing you to enter or select additional account codes.

3.5.2.1 Accounting Code Templates

Account code templates allow you to prepopulate all or part of a dimensional account code, and then alter or add segment values as needed. Any account code already associated with the authorization appears in the Trip Account Code Templates section on the **Add Account Codes** tab of the Account Code Selection window. Favorite account codes are listed in the Favorite Account Code Templates section.

Select a template from either section, and then scroll to the top of the tab to enter or search for the remaining segment values.

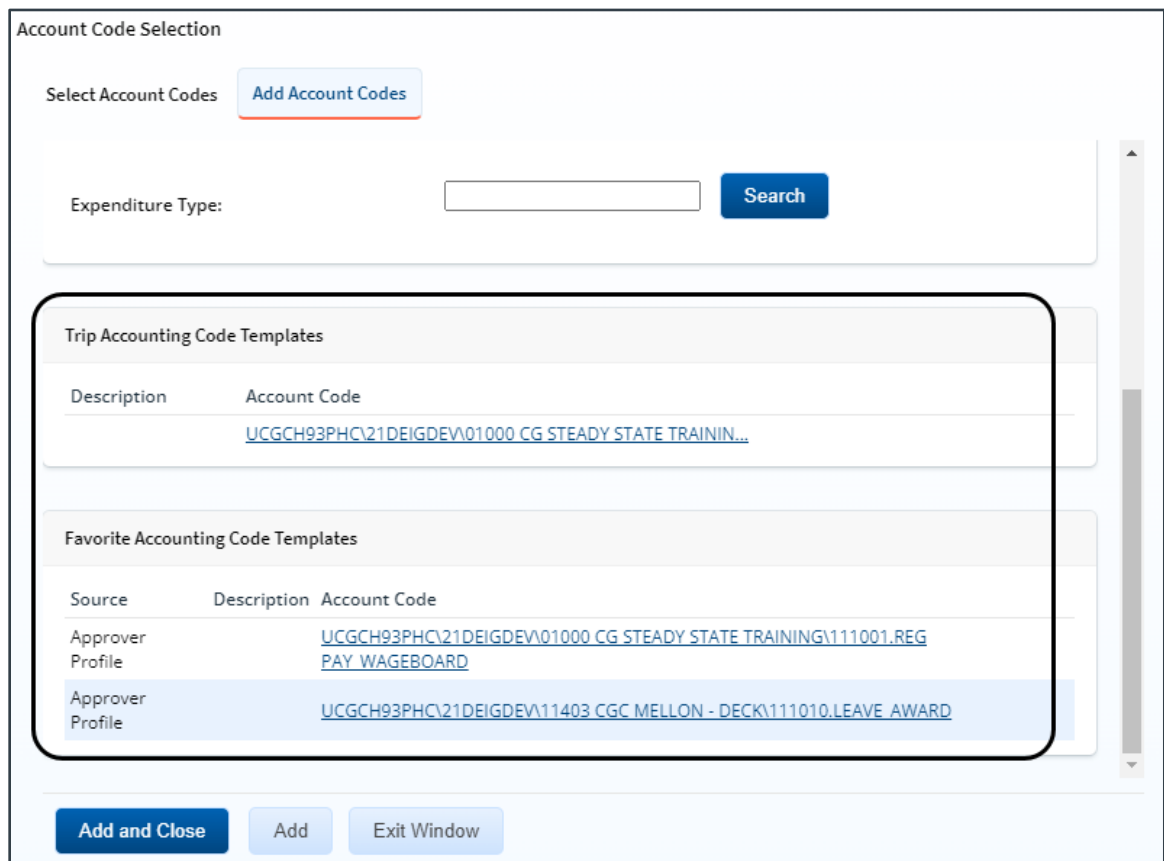


Figure 25: Account Code Selection — Accounting Code Templates

3.5.3 Using Split Funding (Multiple Account Codes)

If you select multiple accounts to fund your travel, you can identify which [expense types should be funded from each account](#), or you can choose to [fund expenses for a range of days](#) from each account. Splitting funds by expense type is the default action.

TIP: You cannot split funds by expense type and also by expense date. If you have already split your funds, you will be prompted to confirm your actions if you attempt to change your funding method from expense type to expense date.

3.5.3.1 Split Funding by Expense Type

Complete the following steps.

1. Click the **Split Funding** link on the Accounting page. This displays the Split Funding window.

Split Funding For Travel Between 15-Nov-2021 and 24-Nov-2021

Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-------	--------	--------	--------	--------	--------

Split Funding By Expense Type

Expense Type	Account Code	CBA	Amount	Detail
Rental Car	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD	N	125.00	Detail
Lodging	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD	N	1744.00	Detail
Meals and Incidentals	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD	N	1140.00	Detail
Privately Owned Vehicle	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD	N	5.21	Detail
Voucher Transaction Fee	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD	N	16.05	Detail

Buttons: Save and Close, Save, Exit Window, [Split By Expense Date](#)

Figure 26: Split Funding — Split Funding by Expense Type

2. Select the accounts to fund each type of expense.
 - To fund an expense type from a single account, select the account from the **Account Code** drop-down list.
 - If you want to fund an expense from more than one account, complete the following steps:
 - i. Click the **Detail** link for the expense type. This expands the section for that expense type.

Split Funding For Travel Between 15-Nov-2021 and 24-Nov-2021

Expense Type	Account Code	CBA	Amount	Detail
Rental Car	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD	N	125.00	Detail
Expense Type	Account Code	CBA	Amount	Detail
Lodging	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD	N	1744.00	Detail
Expense Type	Account Code	CBA	Amount	Detail
Meals and Incidentals	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD	N	1140.00	Detail
Expense Type	Account Code	CBA	Amount	Detail
Privately Owned Vehicle		N	5.21	Clear Detail
Account Code			Amount	
UCGCH93PHC\21DEIGDEV\11403 CGC MELLON - DECK\111010.LEAVE_AWARD			<input type="text" value="0.00"/>	
UCGCH93PHC\21DEIGDEV\01000 CG STEADY STATE TRAINING\111001.REG PAY_WAGEBOARD			<input type="text" value="0.00"/>	
Expense Type	Account Code	CBA	Amount	Detail
Voucher Transaction Fee	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD	N	16.05	Detail

[Split By Expense Date](#)

Figure 27: Split Funding — Expense Type Detail

- ii. Enter the amount of the expense you want to fund from each account in the corresponding **Amount** field. For lodging or meal expenses, select the account to fund expenses for each day of the trip.

Split Funding For Travel Between 15-Nov-2021 and 24-Nov-2021

Expense Type	Account Code	CBA	Amount	Detail
Lodging		N	1744.00	Clear Detail
Date	Account Code		Amount	
15-Nov-2021	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD		161.00	
16-Nov-2021	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD		161.00	
17-Nov-2021	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD		161.00	
18-Nov-2021	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD		161.00	
19-Nov-2021	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD		0.00	
20-Nov-2021	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD		275.00	
21-Nov-2021	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD		275.00	
22-Nov-2021	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD		275.00	
23-Nov-2021	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD		275.00	
24-Nov-2021	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD		0.00	

Buttons: [Save and Close](#) [Save](#) [Exit Window](#) [Split By Expense Date](#)

Figure 28: Split Funding — Lodging Expenses Detail

3. Click **Save and Close** to save your selections, close the Split Funding window, and return to the authorization's Accounting page.


3.5.3.2 Split Funding by Expense Date


Complete the following steps.

1. Click the **Split Funding** link on the Accounting page. This displays the [Split Funding window](#).
2. Click the **Split by Expense Date** link. This displays the Split Funding by Expense Date section in the window.

Split Funding For Travel Between 15-Nov-2021 and 24-Nov-2021


Split Funding By Expense Date

Expense Beginning: 

Expense Ending: 

Account Code:

[Add Split Funding](#)

From	To	Account Code	Amount	Delete
 No split fund date range has been entered.				

Buttons: [Save and Close](#) [Save](#) [Exit Window](#) [Split By Expense Type](#)

Figure 29: Split Funding — Split Funding by Expense Date

3. Select the date range for the funding. Expenses within this date range will be funded from the selected account.
 - **Expense Beginning** – Enter the beginning date of the range (formatted DD-
MMM-YYYY) in the field, or click the calendar icon to select a date from the drop-
down calendar.
 - **Expense Ending** – Enter the ending date of the range in the field, or click the
calendar icon to select a date from the drop-down calendar.
4. Select the account to use for funding from the **Account Code** drop-down list.
5. Click **Add Split Funding**. The details for the established date range display in the data grid below the button.
6. Repeat steps 3–5 until you have funded all of your estimated expenses.
7. Click **Save and Close** to save your selections, close the Split Funding window, and return to the authorization's Accounting page.

3.6 Reviewing Travel Policy Justifications

The Travel Policy Justifications section on the authorization's Summary page shows air, car, hotel, and rail reservations that are out of policy, as well as the traveler's reasons for their out-of-policy selections.

Review the policy items, information, and explanations. If the authorization has an associated reservation, the information and explanations may reflect selections made during the booking process. Review the information and, if necessary, add any remarks by clicking the **Remarks** link in the Other Actions section.

Travel Policy Justifications - View Details		
Policy Item	Information	Explanation
Rental Car Type	Compact	Within policy

Figure 30: Authorization Summary — Travel Policy Justifications section

3.7 Reviewing Travel Policy Warnings

Other items that may deviate from standard policy are listed in the Travel Policy Warnings section on the authorization's Summary page. This section also displays the lowest logical airfare available to the traveler at the time travel was booked, along with the actual booked airfare.

Travel Policy Warnings	
Policy Item	Information
Lowest Compact Car	No commercial rental car reservation.
Hotel Rate Over Per Diem	Lodging per diem exceeded on one or more days in: - Dakar, Senegal (29-Jan-2018)

Figure 31: Authorization Summary — Travel Policy Warnings section

3.8 Reviewing City Pair Information

The City Pair Information section of the authorization's Summary page displays contracted fares for trip sites, including all combinations for metro-related city pairs. All listed fare are one-way fares.

City Pair Information			
All fares listed are one way fares per GSA City Pair Program.			
	City Pair	YCA Fare	-CA Fare
	Washington DC Metro Area (WAS) > London Metro Area (LON)	340.00	0.00
	London Metro Area (LON) > Cardiff, Wales (CWL)	None	None
	Cardiff, Wales (CWL) > Washington Ronald Reagan National Airport (DCA)	None	None

Figure 32: Authorization Summary — City Pair Information section

3.9 Reviewing Remarks

General remarks about the authorization display in the Remarks section of the authorization's Summary page. The traveler or arranger, or even a previous approver, may have added additional information to the authorization request. You should always review any remarks attached to the authorization.

NOTE: Remarks may include system-generated events or information.

Remarks - [Edit Details](#)

[Expand Remarks](#)

Authorization Remarks - Trip ID: 287723

LINCOLN, IRIS 26-Jan-2018 7:43 AM CST
Conference agenda and receipt attached

Figure 33: Authorization Summary — Remarks section

3.9.1 Expand Remarks

Remarks automatically displays in a scrolling box. If you prefer to view the remarks as part of the page, click the **Expand Remarks** link.

3.9.2 Add Remarks

Complete the following steps to add remarks to the authorization.

1. Click **Edit Details** to open the Remarks window.

Remarks for 287723

[View Remarks](#) [Add Remarks](#)

Authorization Remarks - Trip ID: 287723

LINCOLN, IRIS 26-Jan-2018 7:43 AM CST
Conference agenda and receipt attached

[Exit Window](#)

Figure 34: Remarks — Existing remarks

2. Click the **Add Remarks** tab to add remarks to the authorization.

Figure 35: Remarks — Add Remarks tab

3. Enter your remarks and review them. Remarks cannot be edited or deleted after you save them; make any changes before saving.

TIP: Avoid copying and pasting text from other applications. Doing so may result in invalid character errors.

4. Click **Save and Close** to save your remarks and close the Remarks window.

3.10 Reviewing Attachments

Attachments are listed in the Receipts and Attachments section on the authorization's Summary page. The traveler or arranger, or even a previous approver, may have added attachments to the authorization request. Additional information may include files attached to the authorization request. You should always review any files attached to the authorization.

NOTE: The files included in the Receipts and Attachments section include both uploaded attachments and faxed documents.

To view an authorization's attachments, click the corresponding **Show** link to open the file in a new browser window.

Receipts and Attachments - Edit Details			
Trip Attachments - Trip ID: 287723			
Uploaded By	Date Submitted	File Name	Show
LINCOLN, IRIS	26-Jan-2018 7:57:37 AM CST	Usability Conference.pdf	Show

Figure 36: Authorization Summary — Receipts and Attachments section

3.11 Reviewing and Approving a Dependent Travel Authorization

A single trip travel authorization for dependent travel is a simple travel authorization that includes one or more of the user's dependents. These dependents will be listed in the "Travelers for this trip" section, directly below the Basic Information section, on the authorization's Summary page.

The following rules apply to dependent travel authorizations:

- No reservations can be associated with a dependent travel authorization.
- Dependent travel is not eligible for a rental car at the destination sites.

The review and approval process is the same as for simple travel authorizations. Review the information and, if necessary, add any remarks by clicking the **Remarks** link in the Other Actions section.

3.12 Reviewing an Amended Authorization

After an authorization has been approved, a traveler will need to create an amendment if their dates of travel or locations change. An amendment will also need to be created if the POET lines need to be changed or if additional funding should be added to the trip.

When an authorization is amended, E2 appends a dash and a number (-X) to the trip ID. For example, if a traveler amends an authorization for trip ID 12345, E2 appends -1 to the trip ID for the first amendment (e.g., 12345-1), -2 for the second amendment (e.g., 12345-2), and so forth.

If an amended authorization is routed for approval, the process is the same as the approval process for a new authorization. If you are reviewing an amended authorization, however, you may want to compare the amended document with the original document. Click the **View Amendment Changes** link in the Other Actions section to display the [Amendment Changes Summary window](#), which allows you to review the differences between the current amendment and the original authorization/most recent amendment.

You can also print or view the printable authorization document for each version of the authorization, including the version you are reviewing for approval.

3.12.1 Current Version

Complete the following steps to print or view the printable authorization document for the authorization you are currently reviewing.

1. Click the **Printable Authorization** link in the Other Actions section of the authorization's Summary page. The printable document displays in a new browser window.
2. Click the **Print** icon to print the document.

3.12.2 Different Version

Complete the following steps to print or view the printable authorization document for another version of the authorization.

1. Click the **Trip Dashboard** tab.
2. Click the **Show** link for the authorization version you want to compare. This displays the Summary page for that authorization.
3. Click the **Printable Authorization** link in the Other Actions section. The printable document displays in a new browser window.
4. Click the **Print** icon to print the document, and then close the browser window to return to the authorization's Summary page.
5. Click the **Trip Dashboard** tab.
6. Click the **Show** link for the authorization you are currently reviewing to return to that authorization's Summary page and complete the approval process.

4 Completing the Approval Process

When you have finished reviewing the authorization, you can:

- Approve the authorization
- Return the authorization to the traveler or a prior approver for revision
- Unlock the authorization, allowing another approver within your routing pool to access the travel request and take action on it

4.1 Approving the Authorization

Complete the following steps.

1. Click the **Approve** button at the bottom of the authorization's Summary page. A Confirm Action window displays.

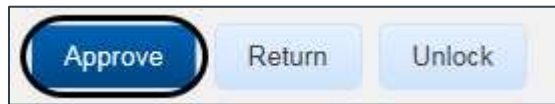


Figure 37: Approve button

2. Click **Confirm**. Authorization validation occurs. If the approval succeeds, your Pending Approval page displays with a message indicating the authorization was successfully approved, and the trip is removed from the list.
 - If there are errors that prevent the authorization from being approved, they appear at the top of the Summary page. Correct the errors and click **Approve** again.
 - If this is a final approval, the authorization is submitted for real-time validation to FSMS. Success or error messages from this validation process may appear after you click **Confirm**. In the case of warnings or errors that result in authorization approval failure, contact your agency's financial system help desk for assistance on how to proceed.

4.2 Returning the Authorization for Revision

An authorization can be returned for revision to the traveler or a prior approver (provided the approver returning the document is the second or higher approver for the authorization). The document will be returned to either the primary approver, if one exists, or the entire routing pool with instructions.

NOTE: *If you are the first level approver on the authorization, your only option is to return the authorization to the traveler. When you click **Return**, the Confirm Action window appears similar to that in the previous figure – the **Return To** field defaults to Traveler and is disabled.*

Complete the following steps.

1. Click the **Return** button at the bottom of the authorization's Summary page. This displays a Confirm Action window.
2. Select *Traveler* or the group to which you are returning the authorization from the **Return To** drop-down list. (The drop-down list includes all previous approval pools.)

Confirm Action

Return To:* Select One...

Reason:* Select One...

Note: Remarks cannot be edited or deleted. Review all information before proceeding.

Allowed Characters: Aa-Zz 0-9 \$ () / : ? @ , , ' _ -

Remarks:

2000 characters left.

*Required

Do you want to proceed?

Confirm Cancel

Figure 38: Confirm Action — Return to Traveler or Approval Pool

3. Select the reason you are returning the authorization from the **Reason** drop-down list.
4. Enter any necessary remarks in the **Remarks** field.

TIP: Review your remarks before clicking **Confirm**; remarks cannot be edited or deleted after you send them.

5. Click **Confirm** to return the authorization.

4.3 Making the Authorization Available to Another Approver

There may be times when you need to allow another approver in the routing pool access to an authorization. When this situation occurs, and the authorization is locked to you for action, you must unlock it. Unlocking the authorization makes it available to other approvers in the routing pool.

Complete the following steps to unlock an authorization that is pending your approval.

1. Open the authorization.
2. Click the **Unlock** link in the Other Actions section, or click the **Unlock** button at the bottom of the authorization's Summary page.

NOTE: If the **Unlock** link or button does not display, the authorization is not locked to you. It may be locked to another approver, or available to all approvers in the routing pool.

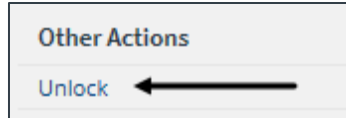


Figure 39: Unlock link

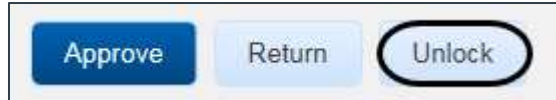


Figure 40: Unlock button

5 Other Actions Available

The Other Actions section contain links to actions you may want to perform while approving an authorization, including:

- [Adding remarks](#)
- [Adding or deleting attachments](#)
- [Printing the authorization](#)
- [Printing a compact authorization](#)
- [Viewing a summary of daily expenses](#)
- [Viewing the itinerary](#)
- [Viewing trip history](#)
- [Viewing comparative trips](#)
- [View open or group authorization details](#)
- [Viewing the routing path](#)
- [Viewing routing history](#)
- [Viewing amendment changes](#)

5.1 Add Remarks

Complete the following steps to view or add remarks for the authorization.

1. Click the **Remarks** link in the Other Actions section. This displays the Remarks window. The [View Remarks tab](#) lists all remarks that currently exist for the authorization.
2. Click the [Add Remarks tab](#).
3. Enter your remarks and review them. Remarks cannot be edited or deleted after you save them; make any changes before saving.

***TIP:** Avoid copying and pasting text from other applications. Doing so may result in invalid character errors.*

4. Click **Save and Close** to save your remarks and close the Remarks window.

5.2 Add or Delete Receipts and Attachments

If receipts and attachments already exist on the authorization, use the Receipts and Attachments section of the authorization's Summary page to view them. Complete the following steps to attach a document to the authorization.

1. Click the **Attachments** link in the Other Actions section. This displays the Trip-Level Attachments window. The maximum file size and allowed file type information display below the **Add Attachment** link.
2. Click the **Add Attachment** link. This displays the system Choose File window.
3. Select the PDF file you want to attach to the authorization.
4. Click **Open**. You are return to the Trip-Level Attachments window. A success message displays when the document is attached, and the new document appears in the list.
5. Click the **Show** link to view the document.

***TIP:** If this is not the document you want attached to the authorization, click **Delete** to remove the file. You are able to delete attached files at any time prior to final approval, as long as you have edit privileges for the document.*

6. Click **Exit Window**.

5.3 Print the Authorization

Once final approval is completed, the approved authorization is the traveler’s approved orders, and the traveler can choose to print a copy of the authorization. Approvers at any stage of the document approval process may also click the **Printable Authorization** link in the Other Actions section to open a printable version of the authorization in a new browser window. Click the **Print** icon to print the document.

E2 Travel Authorization

Tue Oct 26 11:10:58 CDT 2021

PRIVACY ACT NOTICE: The following information is provided to comply with the Privacy Act of 1974(P.S. 93-579). The information requested on the form is required under the provisions of 5 U.S.C. Chapter 57(as amended), Executive Orders 11609 of July 22, 1971, and 1102 of March 27, 1962, for the purpose of facilitating authorization action and the request for advance of funds for travel and other expenses to be incurred under administrative. The information contained in this form will be used by the Federal agency officers and employees who have a need for such information in the performance of their duties. Information will be transferred to appropriate Federal, State, local, or foreign agencies when relevant to civil, criminal or regulatory investigations, or prosecutions. Failure to provide the information required will result in delay or suspension of the processing of this form.

Authorization Information

Document Number	Trip Status	Authorization Id	Type of Authorization
70Z0TDY22000241	Pending Authorization Approval	328494	/Trip-by-Trip Authorization
Traveler	Official Duty Station	Title	Travel Charge Card
CARLOS GARCIA	Washington, DC		Yes

Travelers for this Authorization:

CARLOS GARCIA

Mailing Address	Office Phone	Home Phone
1080 W. Addison St. Chicago, IL 60613 US	2175558525	N/A

Type of Travel	Travel Purpose	Estimated Dates of Travel	Travel Policy
MISSION TRAVEL (P2)	San Diego Site Visit	2021-11-15 thru 2021-11-24	JTR

Authorized Itinerary

Cabin Class

Arrive	Depart	Time	Location	Car	Hotel	Mode	Notes
2021-11-15	2021-11-15	N/A	Washington, DC	NONE	No	CP	
2021-11-15	2021-11-19	N/A	San Diego, CA	RENTAL	Yes	CP	Temporary Duty, LDG \$161, M & IE \$74
2021-11-19	2021-11-24	N/A	Yokohama, JPN	NONE	Yes	CP	Temporary Duty, LDG \$275, M & IE \$162
2021-11-24	2021-11-24	N/A	Washington, DC	NONE	No	NONE	

PA-C = Government auto available and committed
 PA-NA = Government auto not available
 PA-NC = Government auto available and not committed

Authorization Expense Totals

Transport	Lodging	Meals & Incidentals	Car Rental	Local Transport	POV	Misc	Grand Total
0.00	1,744.00	1,140.00	125.00	0.00	5.21	16.05	3,030.26

Authorization Accounting Information

Accounting String	Object Code	CBA Amount	Travel Charge Card Amount	Traveler Amount	Auth Amount
Segment Names: Project/Task/Organization/Expenditure Type		0.00	0.00	0.00	0.00
UCGCH93PHC/21DEIGDEV/11403 CGC MELLON - DECK/111010.LEAVE_AWARD		0.00	16.05	3,014.21	3,030.26

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Figure 41: Printable Authorization

5.4 Print a Compact Authorization

Once final approval is completed, the approved authorization is the traveler’s approved orders, and the traveler can choose to print a copy of the authorization. Approvers at any stage of the document approval process may also click the **Compact Printable Authorization** link in the Other Actions section to open a compact (typically, one page) printable version of the authorization in a new browser window. Click the **Print** icon to print the document.

NOTE: The compact printable authorization may extend past a single page, based upon the content.

E2 Solutions Travel Authorization

Traveler		Official Duty Station		Authorization Id		Travel Policy	
CARLOS GARCIA		Washington, DC		328494		JTR	
Trip Status:		Type of Travel		Document Number			
Pending Authorization Approval		MISSION TRAVEL (P2)		70Z0TDY22000241			
Travel Purpose				Dependents Traveling?			
San Diego Site Visit				No			

Itinerary

Arrive	Depart	Time	Location	Car	Hotel	Mode	Notes
2021-11-15	2021-11-15	08:00 AM	Washington, DC	NONE	No	CP	
2021-11-15	2021-11-19		San Diego, CA	RENTAL	Yes	CP	Temporary Duty, LDG \$161, M&IE \$74
2021-11-19	2021-11-24		Yokohama, JPN	NONE	Yes	CP	Temporary Duty, LDG \$275, M&IE \$162
2021-11-24	2021-11-24		Washington, DC	NONE	No	NONE	

Notes: CP = Commercial Plane

Estimated Expense Totals

Transport	Lodging	M&IE	Car Rental	Local Transport	POV	Misc	Total
0.00	1744.00	1140.00	125.00	0.00	5.21	16.05	3030.26

Accounting Information

Accounting String	CBA Amount	TCC Amount	Traveler Amount	Total Amount
UCGCH93PHC21DEIGDEV01000 CG STEADY STATE TRAINING111001.REG PAY_WAGEBOARD	0.00	0.00	0.00	0.00
UCGCH93PHC21DEIGDEV11403 CGC MELLON - DECK111010.LEAVE_AWARD	0.00	0.00	0.00	0.00
	0.00	0.00	0.00	0.00

Remarks

Date/Time	Author	Remark
No Remarks found for this or associated documents.		

Audit/Approver Information

Date/Time	Official	Action
2021-10-26 11:08 AM		Pending [CGTRAININGPOOL3]
2021-10-26 11:07 AM		Approved [CGTRAININGPOOL1]
2021-10-26 11:08 AM		Approved [CGTRAININGPOOL2]

Requested By: _____ Signature: _____ Date: _____

Authorized By: _____ Signature: _____ Date: _____

Generated from E2 Solutions on: Tue, 26 Oct 2021 11:16:19 CDT Page 1 of 1

Figure 42: Compact Printable Authorization

5.5 View the Daily Expenses Summary

Click the **Daily Expenses Summary** link in the Other Actions section to open the Daily Expenses Summary window. Use this window to review daily expenses for the authorization, as well as associated per diem rates and breakdowns.

The screenshot shows a window titled "View Daily Expenses Summary" with a table of "Daily Expenses". The table has columns for Date, Site, Lodging, Lodging Tax, Meals, Incidentals, M and IE Total, Transportation and Other, Daily Total, Reimbursement Type, and Other Information. There are three rows of data for dates 26-Dec-2020, 27-Dec-2020, and 28-Dec-2020. The 27-Dec-2020 row is highlighted in blue and includes a note: "Lodging: Actual, Meals: Reduced".

Date	Site	Lodging	Lodging Tax	Meals	Incidentals	M and IE Total	Transportation and Other	Daily Total	Reimbursement Type	Other Information
26-Dec-2020	Pittsfield, IL, United States	96.00	0.00	50.00	5.00	41.25	0.00	137.25	Per Diem	First day
27-Dec-2020	Pittsfield, IL, United States	96.00	0.00	37.64	0.00	37.64	0.00	133.64	Lodging: Actual, Meals: Reduced	
28-Dec-2020	Pittsfield, IL, United States	96.00	0.00	75.00	0.00	75.00	0.00	171.00	Lodging: Per Diem	

At the bottom of the window is an "Exit Window" button.

Figure 43: View Daily Expenses Summary window

5.6 View Itinerary Information

If the authorization includes reservations, click the **Itinerary** link in the Other Actions section to open the Itinerary window, which allows you to view reservation details, including ticket data (if available).

The screenshot shows a window titled "Itinerary" with a confirmation number "IFDJER". It is divided into sections for "Air" and "Car".

Air section:

Vendor	Confirmation Number	Class, Flight, and Seat, Fare Type	Dates & Times	Location
United Airlines	CFSNHC	Economy Class Flight: 6271 Seat: 10B -CA	Depart: Thursday, May 24, 2018 08:15am Arrive: Thursday, May 24, 2018 09:37am Flight Duration: 00h22m	IAD/Dulles International (IAD) Lester B Pearson Intl (YYZ)

Estimated Amount: 254.03 USD

Fare Type: | YCA: Govt contract fare | -CA: Govt contract fare limited availability | -CB: Govt contract fare business class | -DG: Govt non-contract fare limited availability | REF: Refundable fare | NRF: Non-refundable fare

Car section:

Vendor	Confirmation Number	Car Type and Rate	Dates & Times	Location

At the bottom of the window is an "Exit Window" button.

Figure 44: Itinerary window

5.7 View Trip History

Click the **Trip History** link in the Other Actions section to display the Trip History page, which allows you to review an audit trail of actions taken on the authorization, including:

- Date and time of event
- Applied travel regulations (i.e., FTR or JTR)
- Minor customer under which the document was created
- Actions taken on document and document status

Trip History

Traveler Name: CLARA CHATHAM Trip ID: 927265 Authorization Status: Pending Authorization Approval

Document History

26Jan21 Tue 12:21PM - Current status New Authorization
26Jan21 Tue 12:21PM - Created by CLARA CHATHAM
26Jan21 Tue 12:21PM - Created for CLARA CHATHAM traveling under Civilian (FTR) Travel Regulations
26Jan21 Tue 12:21PM - Created for Minor Customer: TW USAID Minor 1 (TWMIN1)
26Jan21 Tue 12:24PM - Current status: Pending Authorization Approval
26Jan21 Tue 12:24PM - Trip ID 927265 submitted to TW ROUTING POOL approver ALICE AUBURN by CHATHAM, CLARA
26Jan21 Tue 12:24PM - Justification code submitted by CHATHAM, CLARA - Justification for CABINCLASS - Coach: Within policy
26Jan21 Tue 12:24PM - Traveler is eligible to create a reservation post authorization with an approved air amount of \$1200.00

Departure dates and times are shown in local time for departure location. Expiration dates and times are shown in Central Time.

Figure 45: Trip History page

5.8 View Comparative Trip Information

A comparative trip allows the traveler to add an alternate trip scenario, such as using a different method of transportation, traveling via a different route, or changing travel days or per diem locations. If comparative trips exist, an informational message displays at the top of the authorization's Summary page.

Step 7 : Summary

Traveler Name: IRIS LINCOLN Trip ID: 287787 Authorization Status: Pending Authorization Approval


 **Comparative Trip exists for this travel authorization.**

Figure 46: Authorization Summary — Comparative Trip Exists message

5.8.1 Comparative Trip Summary

Click the **Comparative Trip Summary** link in the Other Actions section to display the Comparative Trip Summary window, which allows you to review a summary of the authorization and the comparative trips.

Comparative Trip Summary		
Detail	Trip Id 287787	Comparative Trip Id 288306
Trip Label	Primary	NZ Site Visit - Wellington
Trip Duration	9 days	3 days
Number Of Sites	1	1
Mode Of Transportation (First Site)	Commercial Plane	Commercial Plane
Lodging Reimbursement Type	Per Diem	Per Diem
M&IE Reimbursement Type	Per Diem	Per Diem
Transportation	0.00	0.00
Lodging	1246.00	186.00
M&IE	1062.50	307.50
Other Expenses	0.00	0.00
Voucher Transaction Fee	0.00	0.00

[Exit Window](#)

Figure 47: Comparative Trip Summary window

5.8.2 Comparative Trip

Click a **Comparative Trip** link to view detailed information about a specific comparative trip. The **Authorization** tab is replaced by the **Comparative Trip** tab, and the Comparative Trip – Summary page displays. Complete the following steps.

1. Review the information provided.
2. Click the **View Details** link in any section to return to that step in the comparative trip workflow.
3. When you are finished, click the **Back to Authorization Summary** link in the Extras section to return to the authorization you are reviewing for approval.

Trip Dashboard Comparative Trip

- 1 [Basic Information](#)
- 2 [Site Details](#)
- 3 [Expenses](#)
- 4 [Summary](#)

Other Actions

Remarks

Extras

Delete Comparative Trip not allowed at this time

Back to Authorization Summary

Step 4: Comparative Trip - Summary

Traveler Name: IRIS LINCOLN Trip ID: 287787 Comparative Trip ID: 288306

[collapse](#) or [expand](#) all sections

Basic Information - [View Details](#)
▼

Site Details - [View Details](#)
▼

Expenses - [View Details](#)
▼

Comparative Trip Summary
▼

Remarks
▼

*Required

Figure 48: Comparative Trip - Summary page

5.9 View Open or Group Authorization Details

If you are approving an authorization created under an open (OA) or group authorization (GA), click the **Open Authorization Details** or **Group Authorization Details** link in the Other Actions section to view details about the OA or GA. Authorizations created under an OA or GA are routed for approval if they exceed the OA or GA limitations.

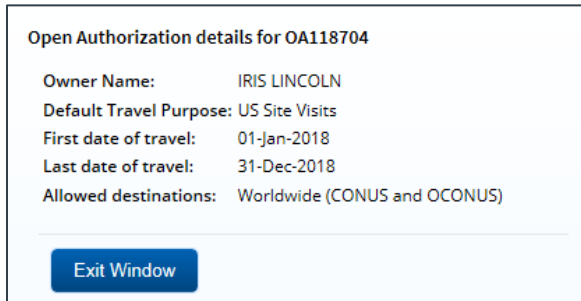


Figure 49: Open Authorization Details window

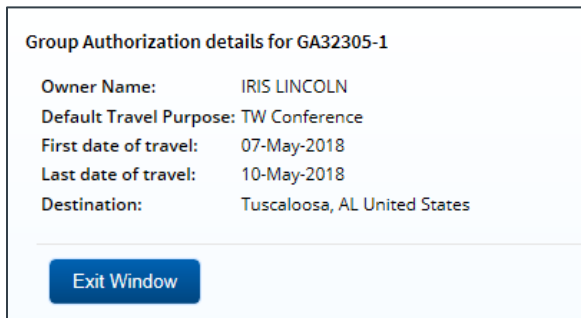


Figure 50: Group Authorization Details window

5.10 View the Routing Path

Click the **View Routing Path** link in the Other Actions section to display the View Routing Path page. This page allows you to view the routing path this document will follow for approval. When an authorization has been submitted for approval, it is sent on a specific path that may include multiple approval steps, triggered by a set of rules applied to the authorization. You can view the routing path, as well as review the members assigned to the routing pool for the current approval step.



Figure 51: View Routing Path — Authorization

5.10.1 Routing Path

The Routing Path list on the View Routing Path page lists all of the steps in the approval path for the authorization, and includes the following information:

- **Step** – The number of the step in the path.
- **Approver Pool** – The name of the approver group assigned to this step. The person who approves the authorization is a member of this approver group.
- **Approval Reason** – The rule that triggered the approval step.
- **Action** – The action to be taken. Some steps are informational only, while others require an approval.
- **Reserved By** – The name of the approver currently responsible for completing this step.

5.10.2 Change the Approver

You can change the approver responsible for the current step. The **Pool Members** drop-down list displays all members of the approver group associated with the approval step. If necessary, select another approver from the same group to handle the authorization. Be sure to click **Save** to save your changes.

5.11 View Routing History

Click the **View Routing History** link in the Other Actions section to display the Routing History page. This page allows you to view an audit trail of routing events for the authorization.

5.12 View Amendment Changes

Click the **View Amendment Changes** link in the Other Actions section to display the Amendment Changes Summary window, which lists the differences between the current amendment and the original authorization/most recent amendment in a side-by-side comparison view.

The window includes the following information:

- **Trip Type** – Value selected from the **Type of Travel** drop-down list on the authorization's Basic Information page
- **Trip Duration** – Total length of the trip in days
- **Number Of Sites** – Number of sites included on the authorization's Site Details page
- **Mode Of Transportation (First Site)** – Value selected from the **Mode of Transportation** drop-down list for the first site on the Site Details page
- **Lodging Reimbursement Type** – *Per Diem*, if that option was selected as the reimbursement type for every day of lodging on the authorization; *Variable*, if a reimbursement type other than *Per Diem* was selected for at least one day on the authorization
- **M&IE Reimbursement Type** – *Per Diem*, if that option was selected as the reimbursement type for every day of M&IE on the authorization; *Variable*, if a reimbursement type other than *Per Diem* was selected for at least one day on the authorization
- **Account Code** – *Added*, if the current document contains an account code that was not on the previous version; *Deleted*, if the previous document contains an account code that is not on the current version; *Added/Deleted* if both the current and previous documents contain account codes not on the other version
- **Transportation Expenses** – Total of all transportation expenses, less any expenses for airfare, airline change fees, and unused tickets
- **Airfare Expenses** – Total of all airfare, airline change fees, and unused ticket expenses

- **Lodging Expenses** – Total of all lodging expenses
- **M&IE Expenses** – Total of all meals and incidental expenses
- **Other Expenses** – Total of all other expenses, less any voucher transaction fee expenses
- **Voucher Transaction Fee** – Amount of the voucher transaction fee (VTF)
- **Estimated Expense Total** – Total of all above expenses

Amendment Changes Summary		
Detail	954540	954540-1
Trip Type	Mission (Operational)	Mission (Operational)
Trip Duration	4 days	5 days
Number Of Sites	1	3
Mode Of Transportation (First Site)	Commercial Plane	Commercial Plane
Lodging Reimbursement Type	Per Diem	Per Diem
M&IE Reimbursement Type	Variable	Variable
Account Code		Added/Deleted
Transportation Expenses	0.00	0.00
Airfare Expenses	0.00	0.00
Lodging Expenses	288.00	661.00
M&IE Expenses	122.25	214.00
Other Expenses	0.00	47.00
Voucher Transaction Fee	20.00	20.00
Estimated Expense Total:	430.25 USD	942.00 USD

Exit Window

Figure 52: Amendment Changes Summary window

6 Printing the Traveler Profile

The **Printable Profile** link in the Extras section allows you to view or print selected traveler profile data. Complete the following steps.

1. Click the **Printable Profile** link. A printable version of the traveler's profile appears in a new browser window.
2. Click **Print This Page** at the top of the page.
3. Select your printer and click **Print**.
4. Close the browser window.

7 Revision History

Date	Description	Release
11/2021	Document creation	21.4

8 Trademark and Copyright

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