



# USCG UG55: Approving Local Travel Claims

Approving Reimbursement Requests for Local Travel  
Release 22.1 | January 2022



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# 1 Introduction

This document contains information regarding the local travel claim approval 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), a local travel claim is generally considered to be an accounting of business expenses that were incurred while conducting official business in the area (typically, within a 50-mile radius) of the traveler's local permanent duty station (home site). A local travel claim can include expenses for up to 60 days. The guide covers the approval process for local travel claims and reclaim local travel vouchers.

### 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 local travel claim (known as a document for routing purposes) 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 routing pools have been created without a primary approver designated.

### 1.1.2 **Routing Rules**

Travel policy managers configure sets of rules that define when a document 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.

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 local travel claims will first route to the unit's Funds Manager routing pool and then to the unit's AO pool. 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 local travel claims, ensuring that:

- The claim is within travel policy
- Expenses are correctly documented
- The correct account has been selected to fund the claim

**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 local travel claim. If accounting codes are not added by the Funds Manager, any other approver can add the poet lines.*

If the claim is within guidelines, or properly justified when outside of guidelines, you approve the local travel claim. Depending on the individual travel request and the applicable routing rules, the claim will then route to the AO-level routing pool. If you are the AO approver, you will typically be the final approver for a claim, and the traveler is notified the claim has been approved for payment. 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.

## 2 Opening a Local Travel Claim 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).

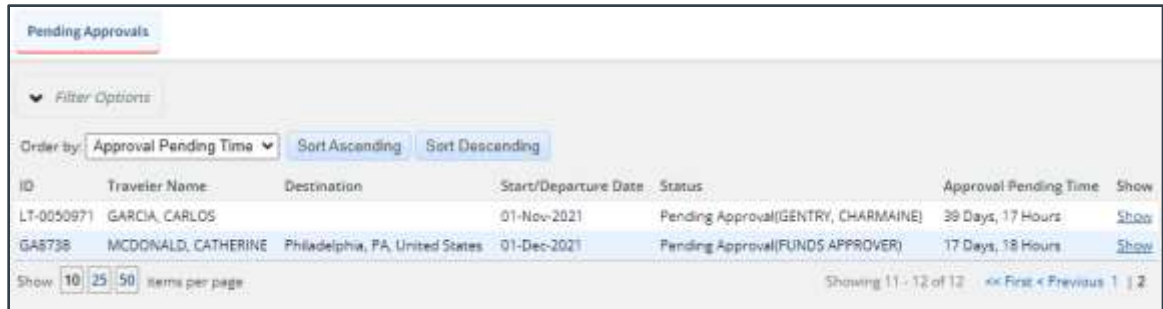


Figure 1: My Approvals — Pending Approvals tab

2. If necessary, use the Filter Options section to filter the list to all local travel claims pending your approval.
  - a. Click the **Filter Options** tab to expand the section and view the filter options available for that page.

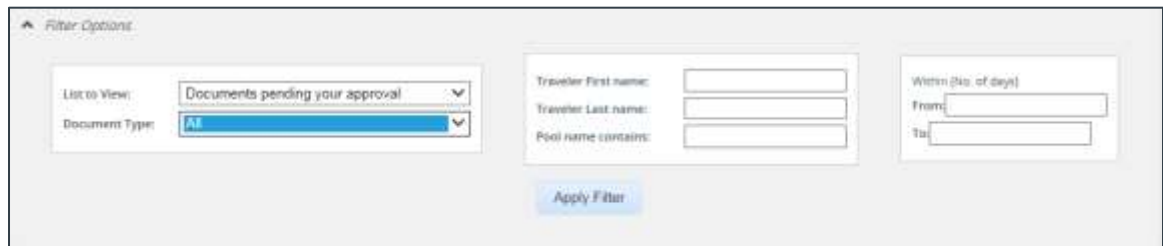


Figure 2: Pending Approvals — Filter Options

- b. Select *Documents pending your approval* from the **List to View** drop-down list.
  - c. Select *Local Travel and Misc. Claims* from the **Document Type** drop-down list to limit the list to only local travel claims pending your approval.
  - d. Enter any additional filtering criteria to limit the number of search results returned.
  - e. Click **Apply Filter** to generate a new list matching your search criteria.
3. Locate the claim in the list.
  4. Click the **Show** link. This displays the Local Travel Summary page.

### Step 4 : Local Travel Summary [↗](#)

Traveler Name: CARLOS GARCIA    Local Claim ID: LT-0050971    Voucher Type: Claim    Claim Status: Pending Voucher Approval

**i** In accordance with Federal regulations all single receipts greater than \$75.00 should be retained for a period of 3 years and 3 months. [collapse](#) or [expand](#) all sections

---

**Basic Information - [View Details](#)**

Type of Travel: OFFICIAL MEETINGS (P2)  
 Specific Travel Purpose: November Regional Meetings  
 Begin Date: 01-Nov-2021  
 End Date: 12-Nov-2021  
 Document Number: 7020LOC22000292

---

**Expenses - [View Details](#)**

Travel Charge Card: 6.90  
 Traveler: 102.79  
 Amount: 109.69

Order by: **Date**    [Sort Ascending](#)    [Sort Descending](#)

Date	Type	Amount	Description	Pay To	Alerts	Show
01-Nov-2021	Bus	2.50		Traveler		<a href="#">Show</a>
02-Nov-2021	Ferry	5.00		Traveler		<a href="#">Show</a>
03-Nov-2021	Metro Rail/Subway	10.75		Traveler		<a href="#">Show</a>
04-Nov-2021	Parking	20.00		Traveler		<a href="#">Show</a>
05-Nov-2021	Supplies	52.37		Traveler		<a href="#">Show</a>
10-Nov-2021	Transportation Network Company - Lyft/Uber	12.17		Traveler		<a href="#">Show</a>
12-Nov-2021	Voucher Transaction Fee	6.90	Voucher Transaction Fee	Travel Charge Card		

Showing 1 - 7 of 7

[Attachment](#) [Remark](#) [Reduced](#) [Credit Card](#)

---

**Accounting - [Edit Details](#)**

Description	Account Code	Amount Allocated	Percent Allocated
	<a href="#">LUCIAFENSRTRAVEL02000 CG PA A SCHOULL111008 LEAV</a>	\$109.69	100.00%
	<b>Total</b>	<b>\$109.69</b>	<b>100.00%</b>
	Remaining amount to be allocated	\$0.00	
	<b>Total claim amount:</b>	<b>\$109.69</b>	

---

**Remarks - [Edit Details](#)**

[Expand Remarks](#)

Local Travel Remarks - Local Travel ID: LT-0050971

GARCIA, CARLOS 15-Dec-2021 1:03 PM CST  
 I hereby assign to the United States any right I may have against any parties in connection with reimbursable transportation charges described below, purchased under cash payment procedures (41CFR 101-41.203-2). I certify that this voucher is true and correct to the best of my knowledge and belief, and that payment or credit has not been received by me.

---

**Receipts and Attachments - [Edit Details](#)**

Attached Documents

**i** No receipts or attachments found.

---

[Approve](#)    [Return](#)    [Unlock](#)    [Back to Step 3: Accounting](#)

Figure 3: Local Travel Summary — Claim Pending Voucher Approval

5. Verify the claim is [locked](#) to you.
6. Use the Local Travel Summary page to review the local travel claim. 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 Local Travel Summary page when you are done making changes to a section.

## **2.1 Lock the Local Travel Claim**

Locking a document prevents any other approver from taking action on that document. You cannot approve a local travel claim (or take any other action) unless it is locked.

- If you are the primary approver in your routing pool, the claim is typically assigned to you for approval, and it should already be locked when you open it. The claim 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.
- If the **Lock** link displays in the Other Actions section, and the **Lock** button appears at the bottom of the page, the document is not currently locked to any approver. Click the **Lock** link (or **Lock** button) to continue.

### 3 Reviewing Basic Information

The Basic Information section is the first section on the Local Travel Summary page.

Basic Information - <a href="#">View Details</a>	
Type of Travel:	OFFICIAL MEETINGS (P2)
Specific Travel Purpose:	November Regional Meetings
Begin Date:	01-Nov-2021
End Date:	12-Nov-2021
Document Number:	70Z0LOC22000292

*Figure 4: Local Travel Summary — Basic Information section*

Basic information for a local travel claim includes:

- Type of travel
- Specific travel purpose
- Begin and end dates
- Document number



## 4 Reviewing Expenses

The Expenses section of the Local Travel Summary page displays general expense information from the local travel claim. Review the expenses for the claim to be sure they are within travel policy guidelines. Click a **Show** link to view additional details about the corresponding expense, including remarks and receipts.

**Expenses - [View Details](#)**

Travel Charge Card: 70.02  
 Traveler: 39.67  
 Amount: 109.69

Order by: Date Sort Ascending Sort Descending

Date	Type	Amount	Description	Pay To	Alerts	Show
01-Nov-2021	Bus	2.50		Traveler		<a href="#">Show</a>
02-Nov-2021	Ferry	5.00		Traveler		<a href="#">Show</a>
03-Nov-2021	Metro Rail/Subway	10.75		Travel Charge Card		<a href="#">Show</a>
04-Nov-2021	Parking	20.00		Traveler		<a href="#">Show</a>
05-Nov-2021	Supplies	52.37		Travel Charge Card		<a href="#">Show</a>
10-Nov-2021	Transportation Network Company - Lyft/Uber	12.17		Traveler		<a href="#">Show</a>
12-Nov-2021	Voucher Transaction Fee	6.90	Voucher Transaction Fee	Travel Charge Card		

Showing 1 - 7 of 7

Attachment: Remark: Reduced: Credit Card:

**Figure 5: Local Travel Summary — Expenses section**

**TIP:** Icons in the Alerts column identify expenses with special situations or conditions. For example, a credit card icon indicates a TCC transaction is associated with the expense.

## 5 Reviewing Accounting

Accounting information for the local travel claim displays in the Accounting section on the Local Travel Summary page.

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

Accounting - <a href="#">Edit Details</a>			
Description	Account Code	Amount Allocated	Percent Allocated
	<a href="#">UCGIAF6LSR\TRAVEL\03000 CG PA A SCHOOL\111008.LEAV...</a>	\$109.69	100.00%
Total:		\$109.69	100.00%
Remaining amount to be allocated:		\$0.00	
Total claim amount:		\$109.69	

Figure 6: Local Travel Summary — Accounting section

Complete the following steps.

1. Click the **Edit Details** link to access the Local Travel Accounting page.

### Step 3 : Local Travel Accounting ?

Traveler Name: CARLOS GARCIA    Local Claim ID: LT-0050971    Voucher Type: Claim    Claim Status: Pending Voucher Approval

Accounting

Description	Account Code	Amount Allocated	Percent Allocated	Add to Favorites	Delete
	<a href="#">UCGIAF6LSR\TRAVEL\03000 CG PA A SCHOOL\111008.LEAV...</a>	\$ 109.69	100.00%	<a href="#">Add</a>	<a href="#">Delete</a>
Total:		\$109.69	100.00%		
Remaining amount to be allocated:		\$0.00			
Total claim amount:		\$109.69			

[Select Account Codes](#)

Save and Next Step
Save
Back to Step 2: Expenses

Figure 7: Local Travel Accounting — Claim pending voucher approval

2. Select account codes or verify the account codes already selected.
  - Click the **Account Code** link to view segment details for the selected account code. (Click **Exit Window** to close the segment details window.)

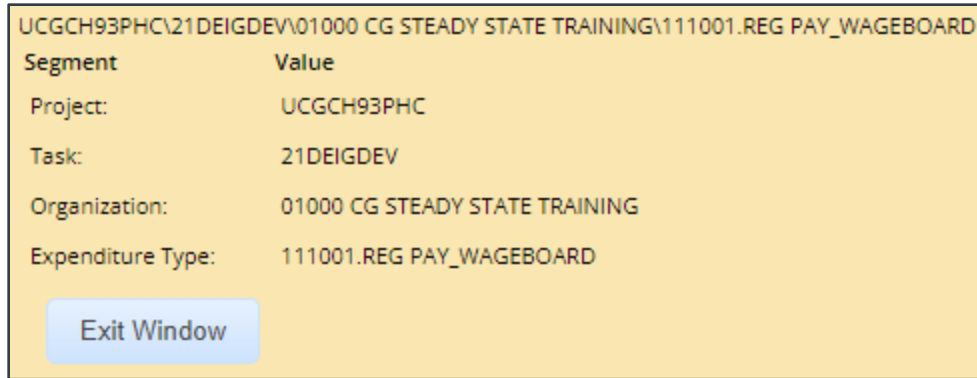


Figure 8: Account Code Segment Details

- If you need to adjust allocations between multiple accounts, enter the appropriate amounts in the **Amount Allocated** or **Percent Allocated** field for each account.
  - Click the **Add** link to save the account code as a favorite.
  - Click the **Delete** link to remove the account from the claim.
  - If you need to select accounts to fund expenses, click the **Select Account Codes** link to [find new accounts](#) or [select accounts from favorites](#).
  - Click the [Split Funding link](#) if there are multiple accounts to fund expenses, and you need to identify certain expense types or all expenses on specific dates to be funded from particular accounts.
3. Click **Save** to save your changes.

## 5.1 Select Account Codes from a Favorites List

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

1. Click the **Select Account Codes** link. This displays the Account Code Selection window.

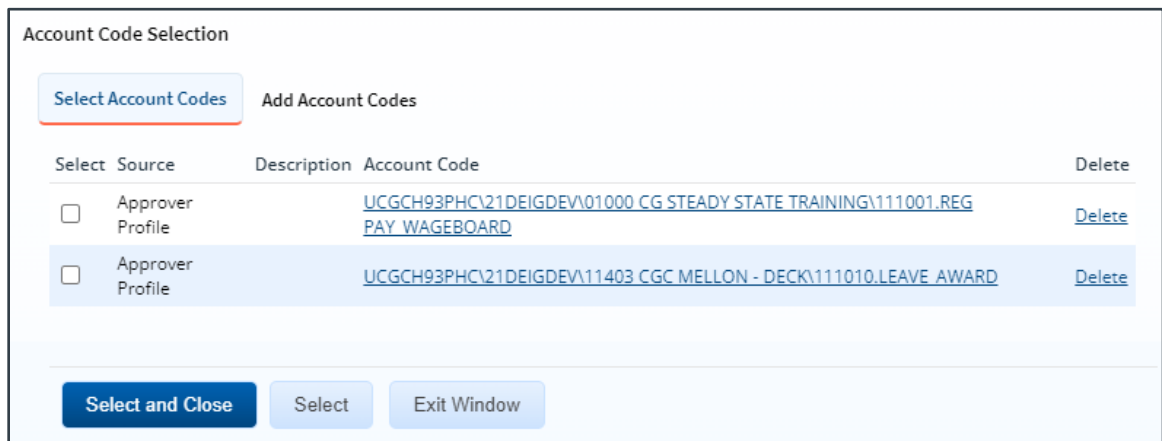


Figure 9: Account Code Selection — Select Account Codes tab

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

## 5.2 Add a Dimensional Account Code

Complete the following steps to add the POET line to the local travel claim.

1. Click the **Select Account Codes** link. This displays the Account Code Selection window.
2. Click the **Add Account Codes** tab.

*Figure 10: Account Code Selection — Add Account Codes tab*

3. Enter segment values for the POET line in each field, 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.

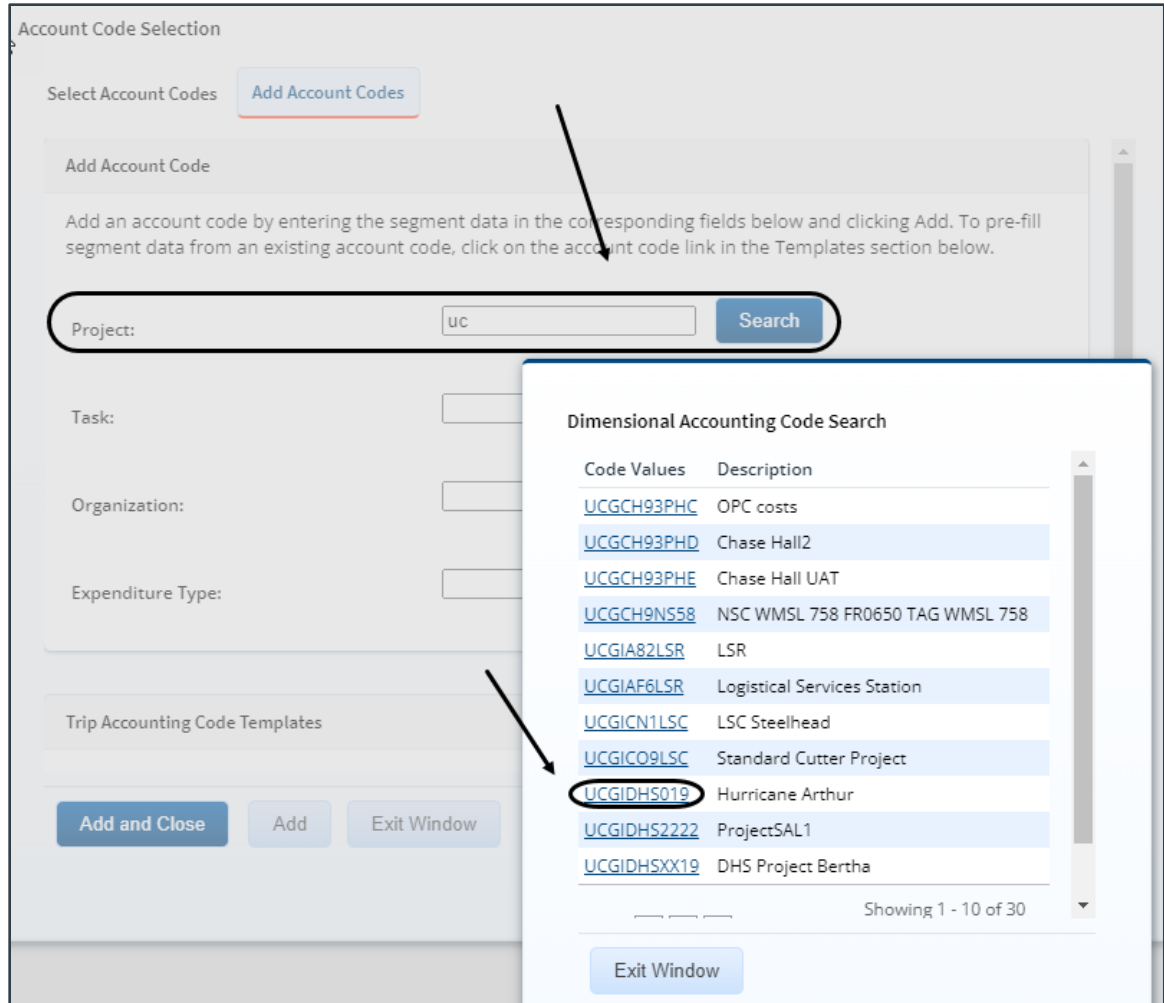


Figure 11: Dimensional Accounting Code Search

4. Click **Add and Close** to add the newly created dimensional account code to the local travel claim, close the Account Code Selection window, and return to the Local Travel Accounting page.

### 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 local travel claim appears in the Trip Accounting 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.

**Account Code Selection**

Select Account Codes [Add Account Codes](#)

---

Expenditure Type:  [Search](#)

---

**Trip Accounting Code Templates**

Description	Account Code
<a href="#">UCGCH93PHCV21DEIGDEV01000 CG STEADY STATE TRAININ...</a>	

---

**Favorite Accounting Code Templates**

Source	Description	Account Code
Approver Profile	<a href="#">UCGCH93PHCV21DEIGDEV01000 CG STEADY STATE TRAINING\111001.REG PAY WAGEBOARD</a>	
Approver Profile	<a href="#">UCGCH93PHCV21DEIGDEV11403 CGC MELLON - DECK\111010.LEAVE AWARD</a>	

---

[Add and Close](#)
[Add](#)
[Exit Window](#)

Figure 12: Account Code Selection — Accounting Code Templates

### 5.3 Split Funding (Multiple Account Codes)

If you select multiple accounts to fund the local travel claim, you can also 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.

#### 5.3.1 Split Funding by Expense Type

Complete the following steps to fund certain expense types from specific accounts.

1. Click the **Split Funding** link. This displays the Split Funding window.

Split Funding For Travel Between 01-Nov-2021 and 12-Nov-2021

Accounting Balances				
Account Code	Amount Allocated	Pay To Trv	Pay To TCC	Pay To CBA
<a href="#">UCGCH93PHCV21DEIGDEV11403 CGC MELLON - DECK\11101...</a>	\$0.00	\$0.00	\$0.00	\$0.00
<a href="#">UCGIAF6LSR\TRAVEL\03000 CG PA A SCHOOL\111008.LEAV...</a>	\$109.69	\$39.67	\$70.02	\$0.00
<b>Total</b>	<b>\$109.69</b>	<b>\$39.67</b>	<b>\$70.02</b>	<b>\$0.00</b>

Split Funding By Expense Type				
Expense Type	Account Code	CBA	Amount	Detail
Supplies	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD	N	52.37	<a href="#">Detail</a>
Expense Type	Account Code	CBA	Amount	Detail
Transportation Network Company - Lyft/Uber	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD	N	12.17	<a href="#">Detail</a>
Expense Type	Account Code	CBA	Amount	Detail
Bus	\11403 CGC MELLON - DECK\111010.LEAVE_AWARD	N	2.50	<a href="#">Detail</a>
Expense Type	Account Code	CBA	Amount	Detail

[Split By Expense Date](#)

Figure 13: Local Travel Claim — Split Funding window

2. Select the account 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.
    - ii. Enter the amount of the expense you want to fund from each account in the corresponding **Amount** field.

Split Funding By Expense Type				
Expense Type	Account Code	CBA	Amount	Detail
Supplies		N	52.37	<a href="#">Clear</a> <a href="#">Detail</a>
	Account Code			Amount
	UCGCH93PHCV21DEIGDEV11403 CGC MELLON - DECK\111010.LEAVE_AWARD			<input type="text" value="25.00"/>
	UCGIAF6LSR\TRAVEL\03000 CG PA A SCHOOL\111008.LEAVE_ANNUAL_WAGEBOARD			<input type="text" value="27.37"/>

Figure 14: Split Funding — Expense Type Detail

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


### 5.3.2 Split Funding by Expense Date


Complete the following steps to fund expenses on specific dates from specific accounts.


1. Click the **Split Funding** link. 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.				

[Save and Close](#)
[Save](#)
[Exit Window](#)

[Split By Expense Type](#)

**Figure 15: Split Funding — Split Funding by Expense Date**

3. Select the date range for the funding.
  - **Expense Beginning** – Enter the beginning date of the range 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 Local Travel Accounting page.



## 6 Reviewing Remarks, Receipts, and Attachments

The Local Travel Summary page includes the Remarks and Receipts and Attachments sections. These sections allow you to view all document and expense-level remarks, receipts, and attachments before you complete your approval task.

### 6.1 Remarks

Travelers can add explanatory remarks to a specific expense or to the entire claim document. The Expenses section on the Local Travel Summary page allows you to review a remark associated with a specific expense; the Remarks section shows all remarks for the document, including remarks associated with the entire claim or a claimed expense.

**TIP:** Click the **Edit Details** link in the Remarks section header to add a remark to the local travel claim.

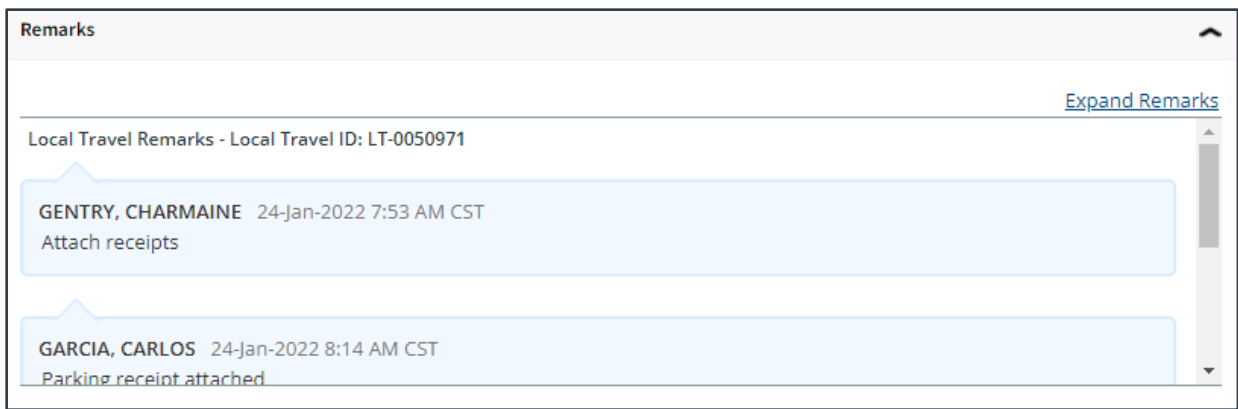


Figure 16: Local Travel Summary — Remarks section

### 6.2 Receipts and Attachments

Like remarks, travelers can attach a receipt or other document to a specific expense or to the entire claim document. The Receipts and Attachments section allows you to review all receipts or documents attached to the claim or to a specific claimed expense.

**TIP:** Click the **Show** link to view the attached document or receipt.

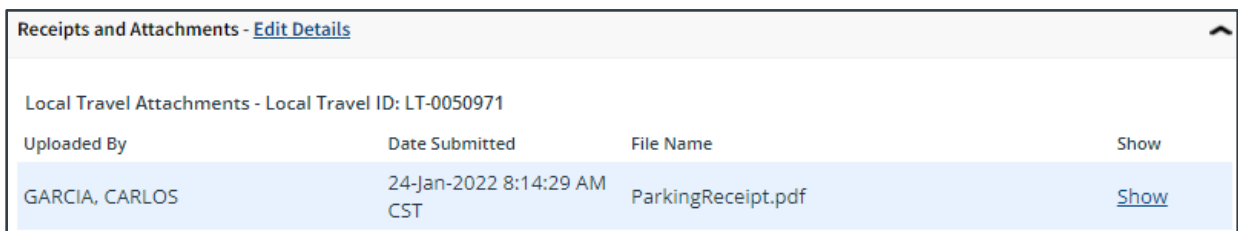


Figure 17: Local Travel Summary — Receipts and Attachments section

## 7 Completing the Approval Process

When you have finished reviewing the local travel claim, you have three options:

- [Approve](#) the claim
- [Return](#) the claim for revision
- [Unlock](#) the claim, so another approver within your routing pool can access the document and take action on it

### 7.1 Approving the Claim

Complete the following steps.

1. Click **Approve** on the Local Travel Summary page. This displays a Confirm Action window.
2. Click **Confirm**. Claim validation occurs.
  - Errors that prevent the claim from being approved appear at the top of the Local Travel Summary page. Correct the errors, and then click **Approve** again. Your Pending Approvals list displays a message that the claim was successfully approved and the trip is removed from the list.
  - If this is a final approval, the local travel claim is submitted for real-time validation to FSMS.

### 7.2 Returning the Claim for Revision

A local travel claim 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 local travel claim). 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 local travel claim, your only option is to return the document 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 Local Travel Summary page. This displays the Confirm Action window.
2. Select the person or group to whom you are returning the local travel claim from the **Return To** drop-down list.
  - The drop-down list displays the *Traveler* option as well as all previous approval pools.
  - If an approval pool has a primary approver, that person's name appears in parentheses to the right of the name of the approval pool (e.g., Routing Pool 1 (Doe, John C.)).

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 18: Confirm Action — Return to Traveler or Approval Pool

3. Select the reason you are returning the local travel claim 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 local travel claim.

### 7.3 Making the Claim Available to Another Approver

There may be times when you need to allow another approver in the routing pool access to the local travel claim. If this situation occurs and the claim is locked to you, you must unlock it. Unlocking the claim makes it available to other approvers in the routing pool.

Click the **Unlock** link in the Other Actions section, or scroll to the bottom of the Local Travel Summary page and click the **Unlock** button.

## 8 Other Actions Available

The Other Actions section contains links to actions you may want to perform while approving a claim, including:

- [Adding remarks](#)
- [Adding or deleting attachments](#)
- [Printing the claim](#)
- [Viewing claim history](#)
- [Viewing the routing path](#)
- [Viewing routing history](#)

### 8.1 Add Remarks

Complete the following steps to view or add remarks for the local travel claim.

1. Click the **Remarks** link in the Other Actions section. This displays the Remarks window. The **View Remarks** tab lists all claim-level remarks that currently exist for the local travel claim. (Use the Remarks section of the Local Travel Summary page to view all remarks.)
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.

### 8.2 Add or Delete Receipts and Attachments

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

1. Click the **Attachments** link in the Other Actions section. This displays the Local Travel 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 local travel claim.
4. Click **Open**. You are returned to the Local Travel 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 local travel claim, 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**.

### 8.3 Print the Claim

Click the **Printable Local Voucher** link in the Other Actions section to display the local travel claim as a PDF file in a new browser window. Click the **Print** icon to print the document.

### E2 Local Travel Voucher

Thu Jan 20 08:49:21 CST 2022

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#### Voucher Information

Document Number (System Assigned)	Trip Status Open Voucher	Trip Id LT-0051229	Submit Date	Approve Date 2022-01-20
Traveler CARLOS GARCIA	Official Duty Station Washington, DC	Title	Final Voucher Flag Yes	
Mailing Address 1060 W. Addison St. Chicago, IL 60613 US		Office Phone 2175558525	Home Phone N/A	
CONUS/OCONUS CONUS	Travel Purpose Local meetings	Agency Travel LOC	Travel Charge Card Holder Yes	
Estimated Dates of Travel 2022-01-03 thru 2022-01-07				

#### Voucher Expense Totals

Transport	Lodging	Meals & Incidentals	Car Rental	Local Transport	POV	Misc	Grand Total
0.00	0.00	0.00	0.00	17.00	0.00	38.18	55.18

#### Voucher Accounting Information

Accounting String	Object Code	CBA Amount	Travel Charge Card	Traveler Amount	Voucher Amount
Segment Names:		0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00

Page 1 of 3

Figure 19: Printable Local Travel Claim

## 8.4 View Claim History

Click the **View Claim History** link in the Other Actions section to display the Trip History page. This page allows you to view an audit trail of actions taken on the claim, showing you not only a description of the event that occurred, but also the name of the person associated with the event. Claim history includes:

- Date and time the claim was created
- Names of users who made changes to the claim
- Date and time the claim was approved
- Claim approver's E2 user name

## 8.5 View the Routing Path

When a local travel claim has been submitted for approval, it is sent on a specific path that may include multiple approval steps, which are triggered by a set of rules applied to the claim. Click the **View Routing Path** link in the Other Actions section to display the View Routing Path page, which allows you to view the approval path for the claim and, if allowed, make minor changes.

The View Routing Path page lists all of the steps in the approval path for the local travel claim, and includes the following information:

- **Step** – The number of the step in the path.
- **Approver Pool** – The name of the approver group assigned to the step. The person who approves the claim 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 who is currently responsible for completing this step.

**View Routing Path** ⓘ

Traveler Name: CARLOS GARCIA    Local Claim ID: LT-0051229    Voucher Type: Claim    Claim Status: Pending Voucher Approval

**Routing Path**

Delete	Step	Approver Pool	Approval Reason	Action	Reserved By	Pool Members
<input type="checkbox"/>	1	FUNDS APPROVER	All Local Travel	Approval		Select Pool Member...
<input type="checkbox"/>	2	AO APPROVER POOL	All Local Travel	Approval		Select Pool Member...

**Save**

Figure 20: View Routing Path — Local Travel Claim

### 8.5.1 Change the Approver

If the local travel claim has a status of *Pending Approval*, 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. For example, if the current approver is unavailable, you can select another approver from the same group to handle the claim.

Complete the following steps to change the approver.

1. Click the **View Routing Path** link in the Other Actions section. This displays the View Routing Path page.
2. Select the new approver from the **Pool Members** drop-down list.

3. Click **Save** to save your changes.

## **8.6** *View Routing History*

Click the **View Routing History** link in the Other Actions section to display the View Routing History page. This page allows you to view an audit trail of routing events for the claim, including the date and time of the event, action that triggered the event, and the event details.

## 9 Revision History

Date	Description	Release
01/2022	Document creation	22.1

## 10 Trademark and Copyright

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