USCG UG15: First Logon and Profile Updates

Your First Steps in E2
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CWT SatoTravel

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1   Introduction

This document contains information regarding the logon process and user profile 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.

2   Getting Started

When your E2 Solutions (E2) account is available, you will receive an email message notifying you that your account has been created. The email provides you with a link you must follow to complete your security profile and gain access to E2.
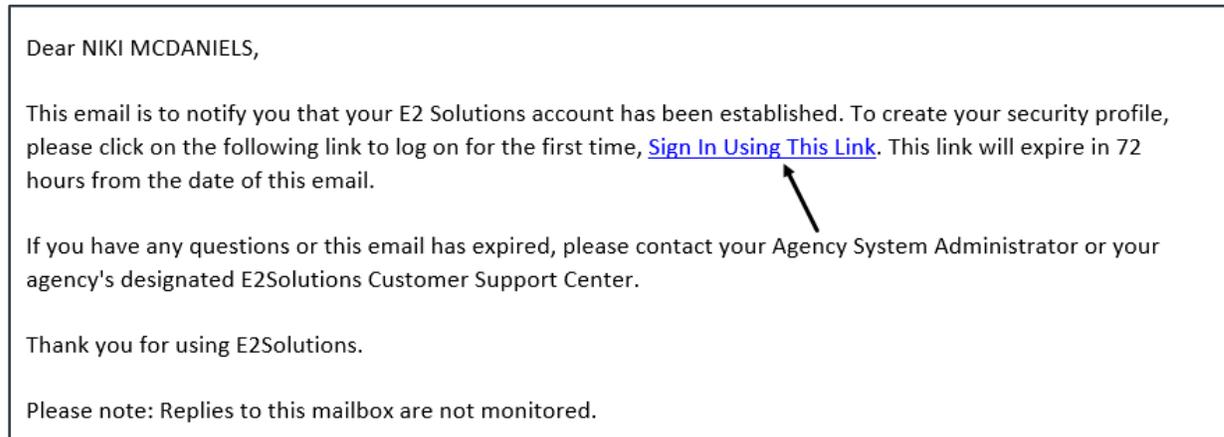
Dear NIKI MCDANIELS,

This email is to notify you that your E2 Solutions account has been established. To create your security profile, please click on the following link to log on for the first time, Sign In Using This Link. This link will expire in 72 hours from the date of this email.

If you have any questions or this email has expired, please contact your Agency System Administrator or your agency's designated E2Solutions Customer Support Center.

Thank you for using E2Solutions.

Please note: Replies to this mailbox are not monitored.

Figure 1: Notification Email

TIP: *You must click the link in the email and follow the instructions within 72 hours. If you do not, the link expires. If this happens, contact your Travel Assist Team at 1-866-800-USCG or email HQS-SMB-CG-1332-TravelManagementOffice@uscg.mil. They can take the steps needed to generate another email notification.*

3   Completing Your First Logon

When you click the link in the notification email, you are prompted to select a password, as well as establish additional security credentials that are used if you forget your password or when you need to change passwords. This information is known as your security profile.

Complete the following steps.

1. Click the link in your notification email, which displays the Password Maintenance page.

Figure 2: Password Maintenance — Initialize Security Information

2. Enter the required security information.

    NOTE: The information you enter in these fields must match your account information. If you have questions, contact your travel policy manager.

    - **E2 User Id** – Enter your E2 user ID.
        o   For employees, your user ID is USCG-#######, where ####### is your employee ID number (e.g., 1234567).
        o   If you are an invitational traveler or other non-employee, your user ID will be USCG-S#####, where ##### is the ID number assigned to you.
    - **Social Security Number or Employee Id** – Enter your employee ID number.

3. Click **Continue**, which displays the Edit Password Information section of the Password Maintenance page.

Figure 3: Password Maintenance — Edit Password Information

4. Complete your security credentials.

- **New Password** – Enter your new password to be used for E2. Passwords must conform to the rules displayed above the field, and cannot be longer than 12 characters.
- **Confirm New Password** – Confirm your password by reentering the value from the **New Password** field.
- **First Security Question / Second Security Question** – Select your security questions from the drop-down lists.
- **Security Answer** – Enter your answers to the selected security questions in the corresponding fields. Each question and answer must be unique.

    *NOTE: Unlike passwords, security answers are **not** case-sensitive when you are prompted to enter them for credentials confirmation.*

- **Confirm Security Answer** – Confirm your security answers by reentering the values from the **Security Answer** fields. The **Security Answer** and corresponding **Confirm Security Answer** fields must match exactly, including case.

5. Click **Save**, which displays the WARNING MESSAGE AND PRIVACY ACT NOTICE window.
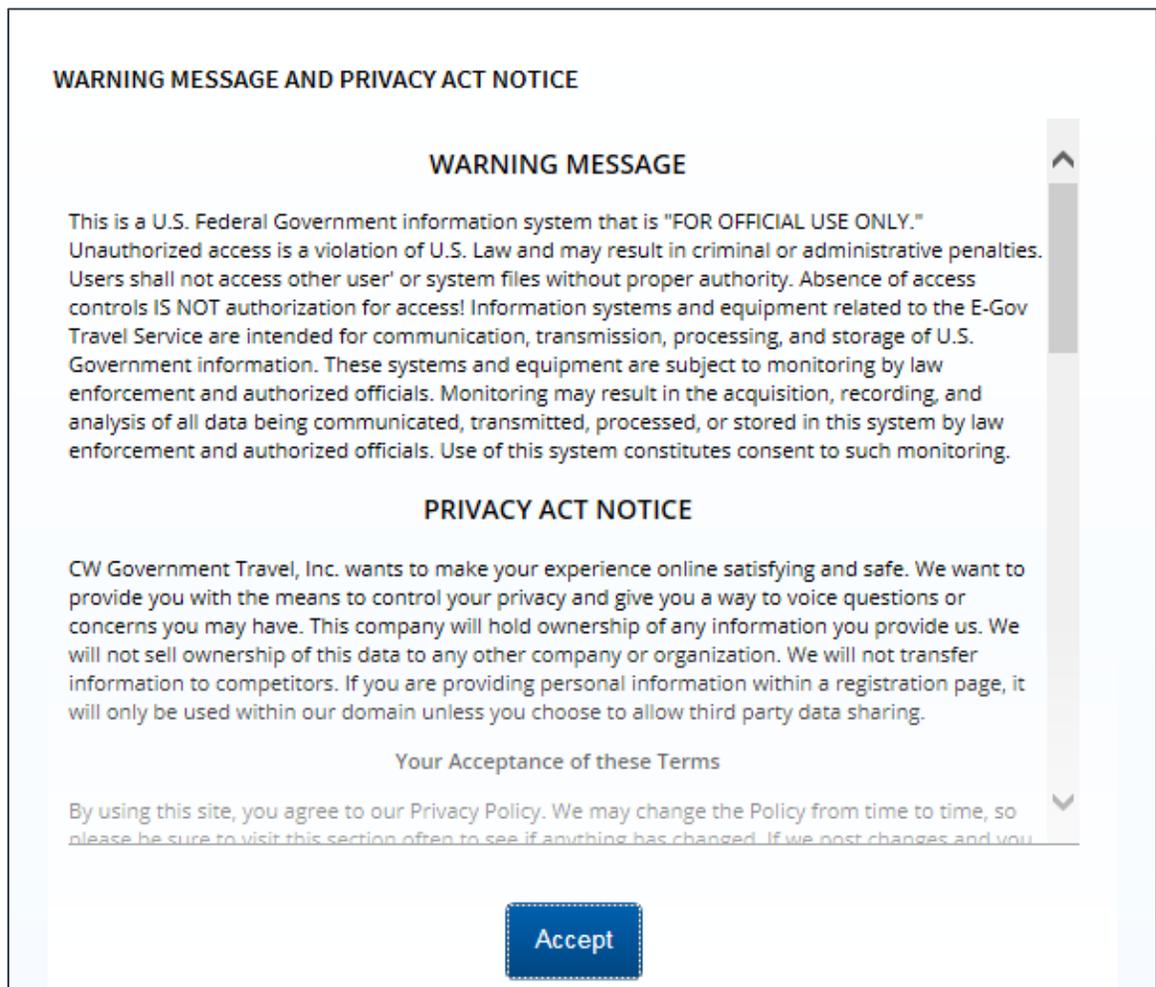

WARNING MESSAGE AND PRIVACY ACT NOTICE

WARNING MESSAGE

This is a U.S. Federal Government information system that is "FOR OFFICIAL USE ONLY." Unauthorized access is a violation of U.S. Law and may result in criminal or administrative penalties. Users shall not access other user' or system files without proper authority. Absence of access controls IS NOT authorization for access! Information systems and equipment related to the E-Gov Travel Service are intended for communication, transmission, processing, and storage of U.S. Government information. These systems and equipment are subject to monitoring by law enforcement and authorized officials. Monitoring may result in the acquisition, recording, and analysis of all data being communicated, transmitted, processed, or stored in this system by law enforcement and authorized officials. Use of this system constitutes consent to such monitoring.

PRIVACY ACT NOTICE

CW Government Travel, Inc. wants to make your experience online satisfying and safe. We want to provide you with the means to control your privacy and give you a way to voice questions or concerns you may have. This company will hold ownership of any information you provide us. We will not sell ownership of this data to any other company or organization. We will not transfer information to competitors. If you are providing personal information within a registration page, it will only be used within our domain unless you choose to allow third party data sharing.

Your Acceptance of these Terms

By using this site, you agree to our Privacy Policy. We may change the Policy from time to time, so please be sure to visit this section often to see if anything has changed. If we post changes and you

Accept

Figure 4: WARNING MESSAGE AND PRIVACY ACT NOTICE window

6. Scroll down to read all of the information provided in the window, and then click **Accept**. Per agency requirements, this window displays each time you successfully log on to E2. You are required to read and accept the terms of use before you can continue.

7. After you click **Accept**, because this is the first time you have successfully logged on to E2, the Rules of Behavior window displays.
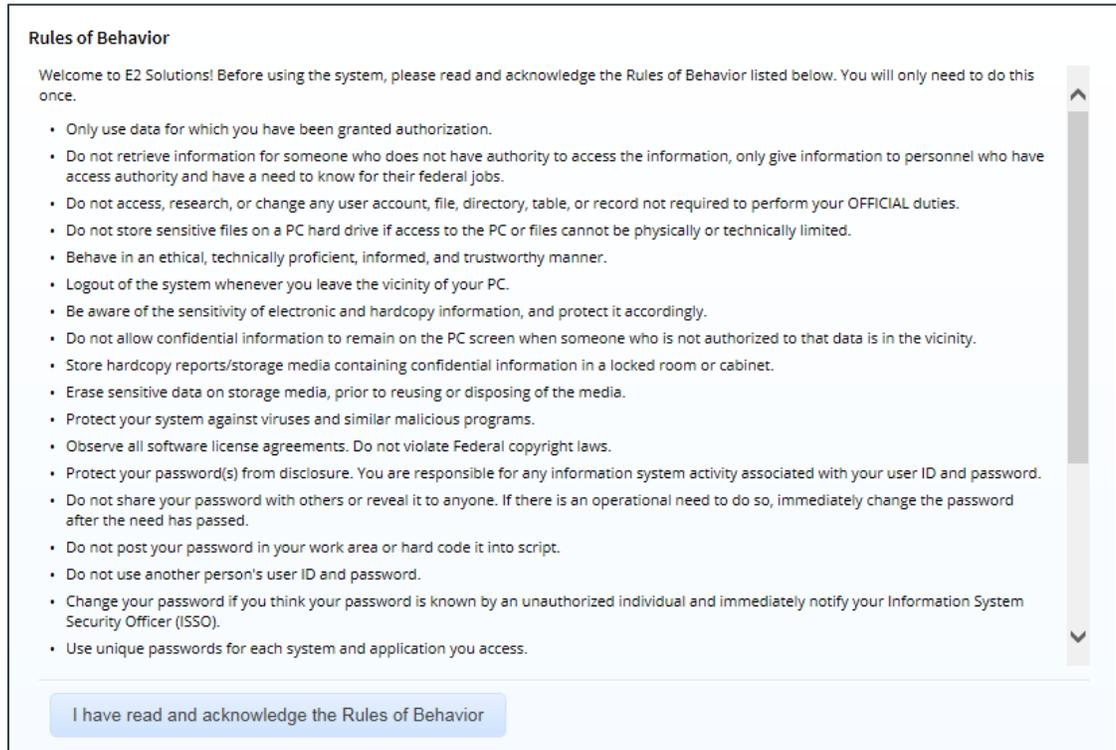

Figure 5: Rules of Behavior window

8. Read the rules, and then click **I have read and acknowledge the Rules of Behavior** button to continue. You are taken into E2 Solutions on the My E2 **At a Glance** tab; you are now logged on and can begin using E2.
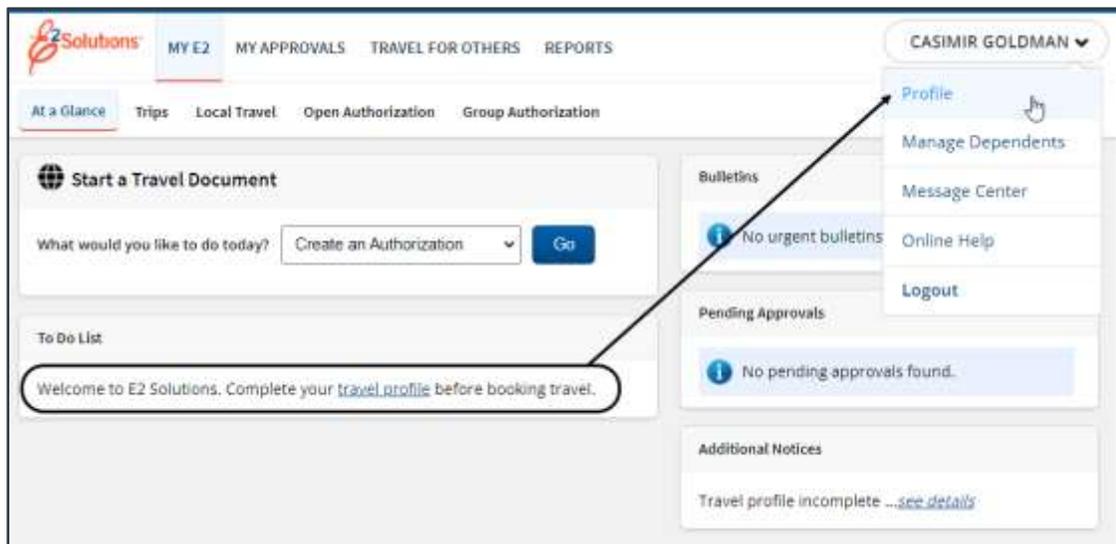

Figure 6: My E2 At a Glance — After Initial Logon, Incomplete Profile

NOTE: If your profile is complete, but lacks TMC profile information, a different message displays in your To Do List. The message (shown in the following figure), however, still directs you to review and take action on your profile.
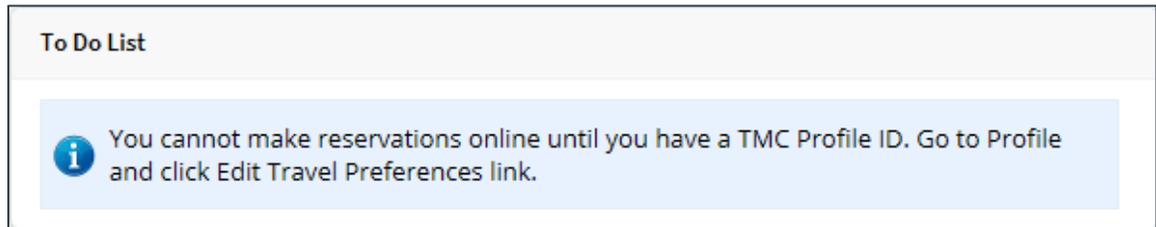

Figure 7: My E2 At a Glance, To Do List — Complete Profile, No TMC Profile ID

4   Completing Your Profile

Every E2 user has a profile. It stores a variety of information, such as your personal preferences regarding travel, ticketing, address and contact information, default home site (i.e., your default departure location for trips), and document routing information. After you log on for the first time, review your profile for accuracy, and add any additional data that may be required before you can plan and book travel using E2.

4.1   Access Your Profile

To get started, click the **travel profile** link in your To Do List on the My E2 **At a Glance** tab, or click the User Options menu in the task bar (i.e., your name), and then select *Profile* from the drop-down list. Either action displays the User Profile page.

4.1.1   User Profile

Each section on the User Profile page displays a section header on the left (i.e., Personal Profile, Default Homesite) and an edit link on the right (i.e., Edit Profile, Edit Homesite).

*TIP: If an **Edit** link does not display, you cannot edit the information.*

The following sections are available:

- **Traveler Name** – The name that identifies you in E2. Your "traveler name," which may be different from your reservation name entered in the Personal Profile section, displays at the top of your user profile and as the label for the User Options menu in the task bar. This name is also used by your agency's FSMS financial system.

    NOTE: You cannot change this name; if your "traveler name" is incorrect, contact your Travel Assist Team for assistance.

- **Last Login Information** – Date and time of your last login to E2, as well as the IP address from which you access the site.
- **Personal Profile** – Click the **Edit Profile** link to display the Personal Information page, which allows you to maintain your position title and reservation name.
- **Approver Availability** – If you are an approver, click the **Edit Availability** link to display the Edit Your Availability page, which allows you to indicate your availability to review and approve documents.

    *NOTE: The **Edit Availability** link only displays for users with a user type of* Approver*.*

- **Default Homesite** – Click the **Edit Homesite** link to display the Default Homesite page, which allows you to indicate your default home location and departure airport.
- **Address Information** – Click the **Edit Address Information** link to display the Edit Address Information page, which allows you to maintain your mailing address and contact information (i.e., home and cell phone numbers).
- **Email Information** – Click the **Edit Email Information** link to display the Edit Email Information page, which allows you to maintain your primary and alternate email addresses.
- **Travel Arrangers** – Click the **Edit Arrangers** link to display the Travel Arrangers page, which allows you to designate other users who are allowed to make travel plans on your behalf.

- **Credit Card Information** – Click the **Edit Credit Card Information** link to display the Credit Cards page, which allows you to enter your GTCC and personal charge card information, as well as indicate which cards should be used by default for air travel, rail reservations, and hotel guarantees.
- **Travel Preferences** – After adding address and credit card information to your E2 user profile, click the **Edit Travel Preferences** link to create and update your TMC traveler profile. The Profile page in the online booking tool opens in a new browser window or tab.

4.1.2 Other Features

The Other Features section at the bottom of the User Profile page displays additional links for optional information that can be added to your E2 user profile.

- **Approval Routing** – Click the **View Approval Routing** link to display the Routing Rules page, which allows you to review the routing templates and individual routing rules assigned to your user account.
- **Email Notifications** – Click the **Edit Email Notifications** link to display the Email Notifications page, which allows you to manage your email subscriptions.
- **Favorite Accounting Codes** – Funds manager approvers can click the **Edit Favorite Accounting Code** link to display the Favorite Accounts page, which allows you to manage a list of favorite account codes.
- **Password Information** – Click the **Edit Password Information** link to expand that section and change your E2 password.
- **Tax Information** – Click the **Edit Tax Information** link to display the Edit Tax Information page, which allows you to manage the information needed to calculate taxes for long-term taxable travel.
- **Printable Profile** – Click the **Printable Profile** link to display a printable version of your user profile in a new browser window.
- **Profile Supplement** – Click the **Profile Supplement** link to display the Profile Supplement page, which allows you to add additional optional information to your user profile.

User Profile

Traveler Name
CARLOS GARCIA

Please click the Edit Address Information link below to enter address information for this user account.

Warning: User Profile does not have any routing rules assigned...please contact your travel System Administrator

Last Login Information
Login Time: not found
IP Address: not found

Personal Profile   Edit Profile
     Position Title:
     Employee ID: USCGTWTRV1
Ticket Preference: Electronic
Reservation Name: CARLOS GARCIA

Default Homesite   Edit Homesite
    Default Homesite: WASHINGTON, DC
Default Depart Airport: DCA-Washington Ronald Reagan National Airport

Address Information   Edit Address Information
   Mailing Address: Not on record
Telephone Number: Not on record (Work)
             Not on record (Home)
             Not on record (Cell Phone)
             Not on record (Fax)
             Not on record (Alt Phone)

Email Information   Edit Email Information
The primary email address should be the address where you want to receive information about travel arrangements made through E2 Solutions.

   Primary Email Address: cgarcia@uscg.mil

The alternate email addresses can be an alternate email for you, supervisor, or a manager to receive information about travel arrangements made through E2 Solutions.

   Alternate Email Address 1: charmaine_gentry@uscg.mil
   Alternate Email Address 2: Not on record
   Alternate Email Address 3: Not on record
   Alternate Email Address 4: Not on record

Travel Arrangers   Edit Arrangers

Credit Card Information   Edit Credit Card Information
Travel Charge Card: None   Without a Travel Charge Card or a Personal Credit Card you will not be able to book hotel reservations
Personal Credit Card: None

Travel Preferences
TMC Profile ID: N/A

                                Register PKI Certificate

Other Features
View Approval Routing
Edit Email Notifications
Edit Favorite Accounting Code
Edit Password Information
Edit Tax Information
Printable Profile
Profile Supplement

Figure 8: User Profile page

4.2   Personal Profile

The Personal Profile page displays when you click the **Edit Profile** link on the User Profile page. The page is divided into two sections: *Personal Information* and *Full Name Information for Reservation*.

4.2.1   Personal Information

The following fields are included in the Personal Information section of the page.

- **Position Title** – Enter your professional job title.
- **Ticket Preference** – This field defaults to *Electronic* and is disabled.

Figure 9: Personal Profile — Personal Information fields

4.2.2   Full Name Information for Reservation

There are two types of names in E2:

- **Traveler Name** – The name that identifies you in E2. Your "traveler name" appears at the top of your user profile and as the label for the User Options menu in the task bar. This name is also used by the FSMS financial system. You cannot change this name; if your "traveler name" is incorrect, contact your travel policy manager for assistance.

Figure 10: User Profile — Traveler Name Location
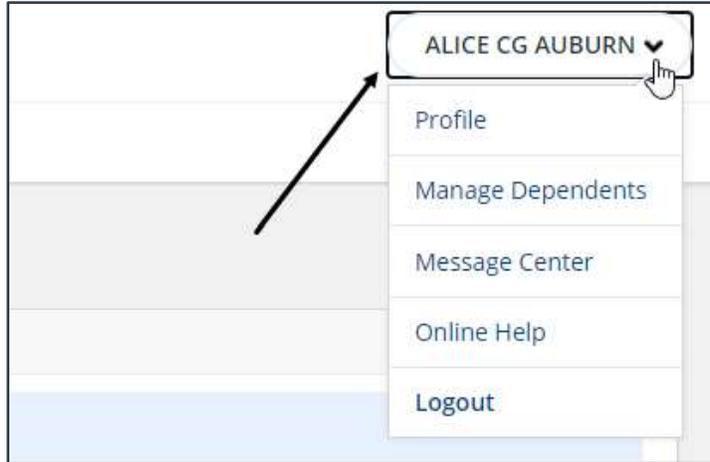
Figure 11: User Options — Traveler Name

- **Reservation Name** – The name used for all of your commercial airplane reservations and by the Transportation Security Administration (TSA) for watch list screening. This name **must** match the government-issued documentation you will use when traveling (e.g., passport, driver's license). You can change your reservation name when necessary.
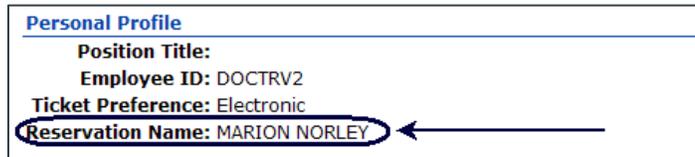
Figure 12: Personal Profile — Reservation Name

4.2.2.1   Verify and Update

Since your reservation name may be different from your traveler name, you should verify and update your reservation name information before booking travel in E2. With the User Profile page displayed, complete the following steps.

1. Click the **Edit Profile** link on the right side of the Personal Profile section. This displays the Personal Profile page.

Figure 13: Personal Profile — Full Name Information for Reservation fields

2. Enter up to 32 characters for your first name, as it appears on your government-issued identification used for travel. This field is required for all air travel in and out of the United States, in support of the Transportation and Safety Administration's (TSA) Secure Flight initiative, and it defaults to your first name as shown in the User Options menu.

3. Enter up to 32 characters for your middle name or initial, as it appears on your government-issued ID used for travel. DO NOT enter a period after the initial.

4. Enter up to 32 characters for your last name, as it appears on your government-issued ID used for travel. This field is required for all air travel in and out of the United States, in support of TSA's Secure Flight initiative, and it defaults to your last name as shown in the User Options menu.

   NOTE: __DO NOT ENTER SUFFIX INFORMATION.__ TSA does not support suffix information for watch list screening at this time. Entering suffix information as part of your last name will cause problems with Secure Flight screening and could result in delayed or denied boarding.

5. Click the **Save** button to save your entries.

   NOTE: If your reservation name does not match the name on your frequent flyer account, contact the airline to change your account name to match your reservation name.

4.3   Approver Availability

If you are an approver, the Approver Availability section is part of your E2 user profile. If you are unavailable due to vacation or illness, this section can be updated to ensure the document is routed to everyone else in your routing pool.

4.3.1   Edit Approver Availability

Complete the following steps to edit your availability via the User Profile page.

1. Click the **Edit Availability** link to display the Edit Your Availability page.

Figure 14: Edit Your Availability page

2. Select your status (i.e., *Available* or *Not Available*) from the **Current Status** drop-down list.

3. If your selected status is *Not Available*, enter the dates you will be unavailable in the **Out of office start date** and **Out of office end date** fields, or click the calendar icon to select the dates from the drop-down calendar.

4. Click the **Save** button to save your entries. If a confirmation window displays, click the **OK** button.

> **NOTE**: *If you select* Not Available*, any travel documents that are locked to you will be unlocked and made available to the other approvers in your routing pool.*

4.3.2   Approver Availability History

Click the **Approver Availability History** link on the User Profile page to display the Approver Availability History page. This page allows you to review all changes to your availability. Each dated entry includes a description of the status change and the name of the user who made the availability update.

Approver Availability History

Date:	Description:
09-Aug-2021	Out of office start date set to 03/01/2021 and end date set to 03/31/2021 by IRIS LINCOLN
09-Aug-2021	Approver set to Available status by IRIS LINCOLN
09-Aug-2021	Out of office start date set to 09/01/2021 and end date set to 09/30/2021 by IRIS LINCOLN

Back to User Profile

Figure 15: Approver Availability History page

4.4   Default Home Site

The Default Home Site page allows you to establish your primary work location and your preferred departure airport. By default, this information is used as the departure and final arrival information for all of your travel.

*NOTE: You can change your default departure or final arrival site on an authorization, if necessary. This modification changes the site information for **that trip only**; the default home site information defined your user profile remains unchanged.*

Click the **Edit Homesite** link on the User Profile page to display the Default Homesite page.

Default Homesite:

Default Homesite: District of Columbia, DC	Edit Homesite
Default Airport: DCA	Edit Airport

Return to User Profile

Figure 16: Default Homesite page

4.4.1   Edit Homesite

Complete the following steps to edit your default homesite.

1.   Click the **Edit Homesite** link, which displays the Edit Default Homesite section on the page. The default list shows all locations within your current selected country and state.

Figure 17: Default Homesite — Edit Default Homesite

2. If necessary, select the country for your home site from the **Country** drop-down list.
3. If necessary, select the state for your home site from the **State** drop-down list.
4. Click **Search** to generate a list of sites.
5. Click a particular location link to select that location as your default home site. The **Default Homesite** field at the top of the page updates to reflect the new location.
   - For U.S. locations, if you cannot find the correct city, look for the county.
   - Click **Other** (below the list of location links) if you cannot find your city or country on the list. Enter the site in the **Other Default Homesite** field; if necessary, select the appropriate country and state from the **Country** and **State** drop-down lists, and then click **Save**.

4.4.2 Edit Airport

Complete the following steps to edit your default departure airport.

1. Click the **Edit Airport** link, which displays the Edit Default Homesite Airport section on the page. The default list shows all airports in your original state or country.

Figure 18: Default Homesite — Edit Default Homesite Airport

2. You can enter part of an airport code after the % in the **Airport** field to limit the list of airport codes to only those that include that text string.
3. If necessary, select the country in which your departure airport is located from the **Country** drop-down list.
4. If necessary, select the state in which your departure airport is located from the **State** drop-down list.
5. Click **Search** to generate a list of airports matching your search criteria.
6. Click a particular airport code link to select that airport as your default departure airport. The **Default Airport** field at the top of the page updates to reflect your selection.

4.5   Address Information

Your mailing address and telephone numbers are used when making reservations online, for payments when a mailing address is required, and to contact you in case of changes to reservations or other travel emergencies. With the User Profile page displayed, complete the following steps to update this information.

1. Click the **Edit Address Information** link on the right side of the Address Information section. This displays the Edit Address Information page.

Figure 19: Edit Address Information

2. At a minimum, ___complete all required fields___. Required fields are marked with an asterisk (*****).

   *TIP: Click the **Click here if your mailing address is outside of the United States** link if you can enter an international mailing address.*

   - **Address line 1** – Enter the street address from your mailing address.
   - **Address line 2** – Enter the second address line from your mailing address.

     *TIP: Add an apartment number, suite information, or P.O box details to the **Address line 2** field.*

   - **City / City or Town** – Enter the city from your mailing address.
   - **State or Province** – This field is pre-filled based on your default home site. If necessary, enter the state or province from your mailing address.
   - **Country** – Select the country from your mailing address from the drop-down list.
   - **Zip/Postal Code** – Enter the postal code from your mailing address.
   - **Work Phone** – Enter your work telephone number, including area code.
   - **Home Phone** – Enter your home telephone number, including area code.
   - **Cell Phone** – Enter your cell phone number, including area code.
   - **Alt Phone** – Enter your alternate phone number, including area code.
   - **Fax** – Enter your fax number, including area code.

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

4.6 Email Address

Your email address is used to notify you of a variety of events, including:

- E-ticket receipts and booking confirmations
- Reservation changes
- Approval of travel documents
- Travel emergencies
- Events requiring your action (e.g., voucher to be submitted, travel to be approved)

4.6.1 Primary Email Address

Your profile must include one primary email address. This address was entered when your E2 account was created, and is the email address where you received your initial E2 access email. When you book reservations via the online booking tool, your primary email address becomes part of your reservations.

4.6.2 Alternate Email Addresses

Alternate email addresses receive copies of your reservation-related emails. An alternate email address might be a personal email address that you check frequently, or the address of a travel arranger or work supervisor. You can store up to four alternate email addresses in your profile.

E2 sends email address information to the online booking tool. The online booking tool and airlines may use the first three alternate email addresses for reservation and travel-related emails (i.e., **Alternate Email Address 1**, **Alternate Email Address 2**, and **Alternate Email Address 3** fields). The **Alternate Email Address 4** field is mapped to the online booking tool's **Travel Arranger E-mail** field, found in the E2 online booking tool's Profile Personal Information section. Like your primary email address, this email address becomes part of your reservations and

receives reservation-related emails and invoices from CWTSatoTravel. This address, however, will not receive an email at the time of booking or for a reservation change.

4.6.3   Updating Email Addresses

With the User Profile page displayed, complete the following steps to update your primary and/or alternate email addresses.

1. Click the **Edit Email Information** link on the right side of the Email Information section. This displays the Edit Email Information page.

Figure 20: Edit Email Information page

2. Your primary email address displays in the **Primary Email Address** field. Government travel policy restricts the domain of the primary email address to the following:
    - .gov
    - .mil
    - .edu (additional restrictions may apply)
    - .fed.us
    - .state.us (e.g., state.la.us)
3. Enter up to four alternate email addresses in the **Alternate Email Address** fields. Travelers must enter their supervisor's email address (i.e., someone at level E7 or above) as one of the alternate email addresses to ensure they also receive emails regarding your approved travel and any other travel-related notifications (e.g., if the Funds Manager requires their approval prior to approving funds).

    TIP: Domain restrictions imposed on the primary email address do not impact alternate email addresses.

4. Click **Save** to save your entries.

4.7   Travel Arrangers

Your unit or office may allow another user to make travel plans on your behalf. Travel arrangers can create authorizations and make reservations for you, as well as take other actions, such as cancel an approved trip, even if that trip includes reservations or has been ticketed. You can allow arrangers to also submit vouchers on your behalf.

You can add travel arrangers to your profile, and remove them when necessary, on the Travel Arrangers page. Click the **Edit Arrangers** link on the User Profile page to display the Travel Arrangers page. This page displays a list of any previously defined travel arrangers and their ability to submit vouchers for you.

WARNING: By default, travel arrangers cannot directly submit a voucher for your travel. If you permit a travel arranger to submit travel vouchers on your behalf, you are legally responsible for the accuracy and completeness of any travel voucher the travel arranger submits.

Figure 21: Travel Arrangers page

4.7.1   Add a Travel Arranger

With the Travel Arrangers page displayed, complete the following steps to associate a travel arranger with your E2 user profile.

1. Enter one or more search criteria in the fields in the Travel Arranger Search section.
   - You can enter part of a user's actual name (**Arranger's First Name** and/or **Arranger's Last Name** fields) or E2 user ID (**Arranger's Login Name** field) as search criteria. For example, entering *j* in the **Arranger's First Name** field will return users with names such as James Fields, Jane Martin, Josie Smith, and so on.
   - Fields are not case-sensitive, but, if you enter data in multiple fields, only results that match all entered data will be returned.
2. Click the **Search** button to return a list of matching users for your agency.

Figure 22: Travel Arrangers — Travel Arranger Search results

3. Click on the name of the user you want to add as a travel arranger. The page refreshes and includes the selected user in the list of travel arrangers in the top section of the page.
4. The "Permission to directly submit voucher" column displays in the Travel Arrangers section. Click the link for an arranger to indicate whether that arranger is allowed to directly submit a travel voucher on your behalf.
   a. When the Arranger Permission window displays, select the **Yes** or **No** (default) radio button.
   b. Click the **Save** button to save your selection and return to the Travel Arrangers page.

Figure 23: Travel Arrangers — Arranger Permission window

5. Repeat steps 2–4 to associate additional travel arrangers with your profile.
6. Click the **Return to User Profile** button to return to the User Profile page. All users you specified as travel arrangers are listed in the Travel Arrangers section.

4.7.2   Remove a Travel Arranger

With the Travel Arrangers page displays, click the **Delete** icon to the right of the travel arranger you want to remove from your profile.
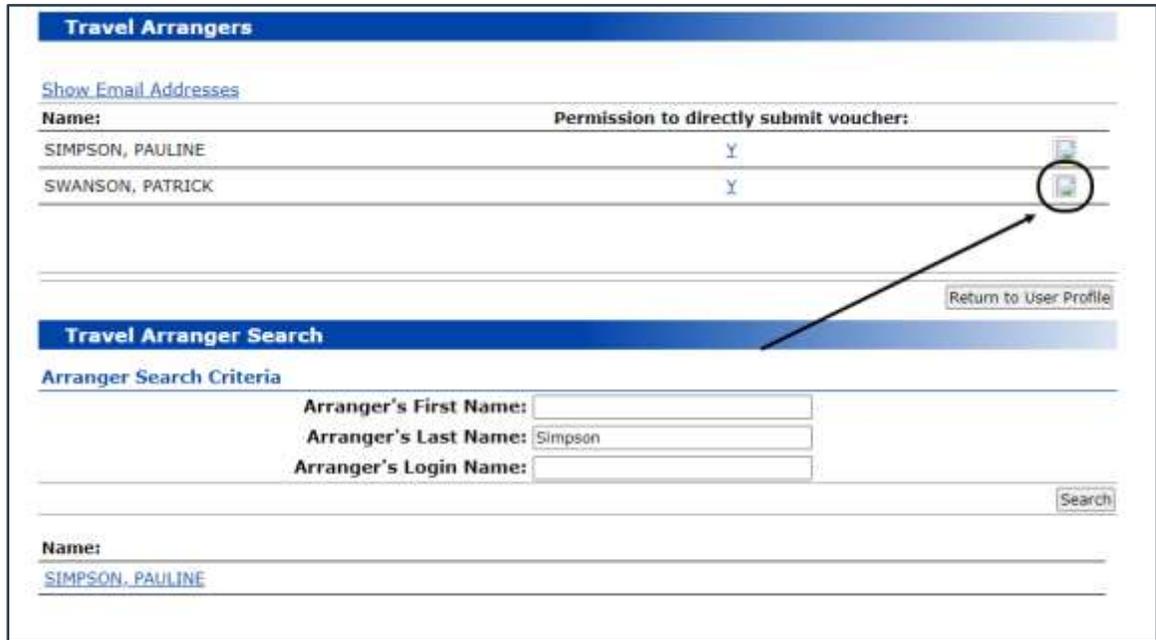
Figure 24: Travel Arrangers — Delete icon

4.8   Credit Card Information

Your profile may include government-issued travel charge card and personal credit card information, as well as the default card or method of payment used for airfare, rail, and to guarantee hotel reservations. These defaults are used when you book travel online via E2, or when you request travel agent assistance for bookings via E2. Airfare and rail will typically be charged to your GTCC, if you have one. If you do not have a GTCC, airfare and rail will be billed to the agency. Your personal credit card can be used for hotel guarantees.

Complete the following steps to update your credit card information.

1. Click the **Edit Credit Card Information** link (on the right side of the Credit Card Information section on the User Profile page). This displays the Credit Cards page.

Figure 25: Credit Cards — No Available Card Information

2. Add the information for your travel charge card in the Travel Charge Card section.
    a. Select the type of travel charge card you are adding from the **Type of Card** drop-down list.
    b. Enter the card number (without dashes or spaces) in the **Card Number** field.

    *NOTE: When you click **Save Changes**, the number entered in the **Card Number** field will be masked and display only the last four digits (e.g., XXXXXXXXXXX1234).*

    c. Select the card's expiration date using the **Expiration Date** drop-down lists. Select the month from the first drop-down list and the year from the second list.
3. If you do not have a GTCC, you may add a personal credit card to book hotel reservations. Add the information for your personal credit card in the Personal Charge Card section.
    a. Select the type of personal credit card you are adding from the **Type of Card** drop-down list.
    b. Enter the card number (without dashes or spaces) in the **Card Number** field.

    *NOTE: When you click **Save Changes**, the number entered in the **Card Number** field will be masked and display only the last four digits (e.g., XXXXXXXXXXX1234).*

    c. Select the card's expiration date using the **Expiration Date** drop-down lists. Select the month from the first drop-down list and the year from the second list.

4. Select your default payment methods in the Online Booking Charge Card Defaults section.
   a. Select one of the following options from the **Airfare Charge Card** drop-down list to indicate the default form of payment to use for airfare.
      - **CBA (Centrally Billed Account)** – Select this option to use the CBA for airfare charges.
      - **No default** – Select this option to indicate there is no default form of payment for airfare charges. You will be required to enter a travel charge card or CBA information each time you book travel reservations.
      - **Travel Charge Card** – Select this option to use your travel charge card for airfare charges.
   b. Select one of the following options from the **Rail Charge Card** drop-down list to indicate the default form of payment to use for rail reservations.
      - **CBA (Centrally Billed Account)** – Select this option to use the CBA for rail charges.
      - **No default** – Select this option to indicate there is no default form of payment for rail charges. If selected, the TMC must contact you for billing information and you may be charged a full service TMC fee, even though you made the reservation online.
      - **Travel Charge Card** – Select this option to use your travel charge card for rail charges.
   c. Select one of the following options from the **Hotel Guarantee Charge Card** drop-down list to indicate the default form of payment to use for hotel guarantees.
      - **No default** – Select this option to indicate there is no default form of payment for hotel guarantees. If selected, you may not be able to make hotel reservations online via E2.
      - **Personal Charge Card** – Select this option to use your personal charge card for hotel guarantees.
      - **Travel Charge Card** – Select this option to use your travel charge card for hotel guarantees.
5. Click **Save Changes** to save your entries. Your online booking tool profile and the GDS are also updated with your entries/selections.
6. Click the **Back to Profile** link to return to the User Profile page.

4.8.1   Modifying Existing Credit Card Information

If you need to modify the information for a travel or personal charge card that was previously added to your profile, simply enter or select the new information in the appropriate section.

*TIP: Be sure to click **Save Changes** to save your changes before returning to your profile!*

- All existing Online Booking Charge Card Defaults will remain in place and will not change unless you choose to update them.
- Any changes will also be sent to the GDS and the online booking tool to update your profile.
- When the travel charge card (TCC) is updated, E2 will check for any future-dated reservations using that TCC. If reservations are found and they have not yet been ticketed, E2 will update those reservations with the new TCC number and/or expiration date. An entry will also be added to the Trip History for any affected trip to reference the change: *[DATE/TIME] – PNR [RECORD LOCATOR] was updated with new TCC information for [TRAVELER NAME].*

4.8.2 Delete Existing Credit Card Information

Click the trash can icon () in a section to remove that credit card information. The **Type of Card** field is reset to *No Card on File*, and the **Card Number** and **Expiration Date** fields are cleared.

- Any existing Online Booking Charge Card Defaults for that card will also be removed, and the corresponding field(s) will revert to *Select One*. All other existing defaults, however, will remain in place and will not change unless you choose to update them.
- The card that was deleted will also be removed from your profile on the online booking tool and the GDS.

*TIP: Be sure to click **Save Changes** to save your changes before returning to your profile!*

4.9 Travel Preferences

Your TMC travel profile is used when you book travel using the E2 online booking tool or request agent assistance for reservations. When you first log on to E2, the Travel Preferences section of your E2 user profile usually shows that you do not have a TMC travel profile, and there is no link to edit or create a profile. The **Edit Travel Preferences** link displays after you enter your address and credit card information.

Figure 26: Travel Preferences — Edit Travel Preferences

When you click the **Edit Travel Preferences** link for the first time, your TMC travel profile is created, and information from your E2 profile is copied to your TMC travel profile, including reservation name, address information, email addresses, and credit card information. After your TMC travel profile is created, it is automatically updated when your E2 profile changes. This assures that information shared between the profiles is always synchronized.

With the User Profile page displayed, complete the following steps to add information to your TMC travel profile that is not shared by your E2 profile.

WARNING: While you have the ability to update shared information (i.e., addresses, credit cards, email settings) in your TMC travel profile, CWTSatoTravel strongly recommends that you only update those settings within your E2 profile. Updates to shared information made in your TMC travel profile are not transferred back to E2. Making the updates in E2 ensures that both profiles have the correct and most current information. Having this information out of sync can cause difficulties when you try to book travel.

1. Click the **Edit Travel Preferences** link on the right side of the Travel Preferences section. Your TMC travel profile is created, and you are redirected to the E2 online booking tool's Profile page, displayed in a new browser window or tab.
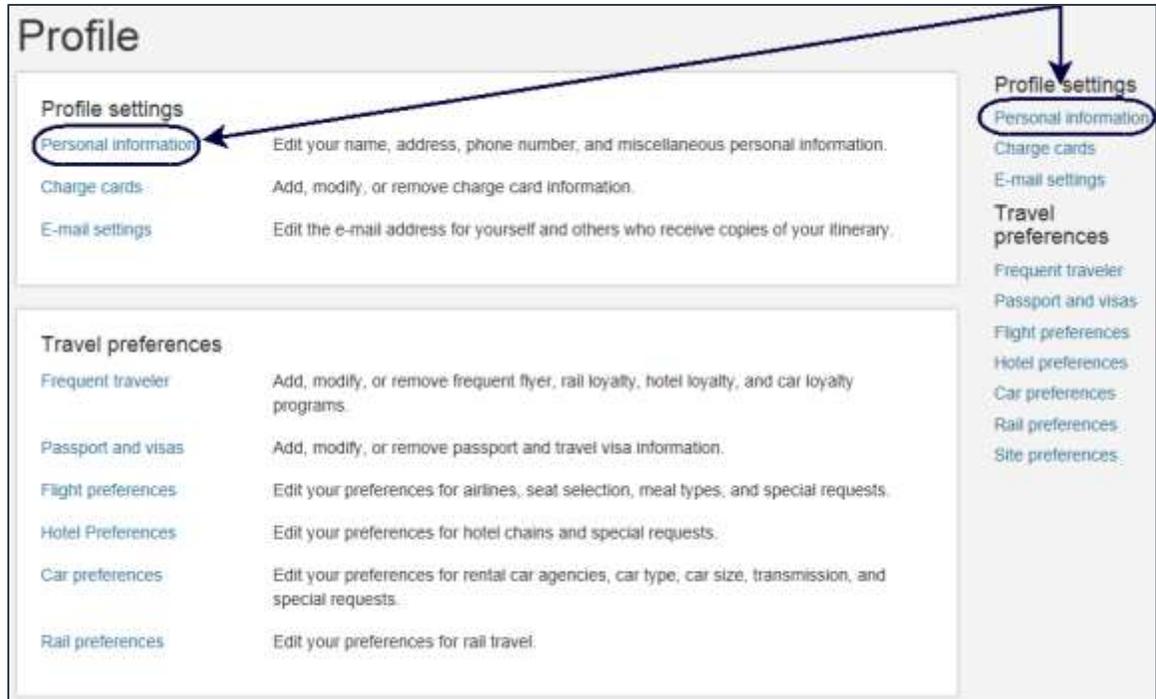
Figure 27: E2 Online Booking Tool — TMC Travel Profile, Profile page

2. Click the **Personal information** link in the Profile Settings section. This displays the Personal Information page for your TMC travel profile.

Figure 28: TMC Travel Profile, Personal Information — TSA-Requested Details

3. **Gender** – Select your gender from the **Gender** drop-down list.
4. **Date of birth** – Enter your birth date in the **Date of birth** fields.

      a.   Select the month you were born from the **Month** drop-down list.
      b.   Select the day you were born from the **Day** drop-down list.
      c.   Select the year you were born from the **Year** drop-down list.

NOTE: Your gender and date of birth are required by the TSA. If you do not save this information in your TMC travel profile, you must enter it each time you book airline reservations. Tickets cannot be issued without this information.

5. **Redress number** – If applicable, enter 13 alpha-numeric characters for your redress number in the field. You may have a redress number if you were previously misidentified as a potential match to the watch list, and applied for redress through the DHS Traveler Redress Inquiry Program (TRIP). TSA's Secure Flight program uses the results of the redress process in its watch list matching, thus preventing future misidentifications for passengers who may have a name that is similar to an individual on the watch list. Refer to the TSA website for more information.

TIP: Due to varied levels of support by the global distribution systems (GDS), the redress number is available for profile capture only. If provided, the redress number is not currently included with the reservation. Travelers with a redress number should contact the airline directly to include this information on the air travel itinerary.

6. **Known Traveler Number** – If you participate in the TSA Pre✓™ expedited screening program, enter your Known Traveler Number (PASS ID) in the field, making that information available for both online and offline bookings.

Known Traveler Number

Please enter between 9 and 11 characters. No spaces or special characters.

Known Traveler Number

Figure 29: TMC Travel Profile, Personal Information — Additional Information

7. Click **Save** at the bottom of the page.
8. If you want to record other traveler preferences, click the **Flight preferences** link to specify your seat and meal preferences, or click the **Frequent traveler** link to add frequent flyer and other loyalty program numbers to your TMC travel profile.

*TIP: Always click **Save** after making any changes.*

9. Click the **CLICK HERE when finished to close the window** hyperlink (at the top of the page), when you are finished with your entries, or just close the window.

📢 Announcements
Thank you for building your profile. Please feel free to update any other profile items by selecting one of the links below. **CLICK HERE** when finished to close the window.

Figure 30: E2 Online Booking Tool — CLICK HERE link

In E2, the Travel Preferences section of your profile will be updated with your TMC profile ID. This may take a few minutes; you should see your TMC profile information if you refresh the page or when you next review your user profile.

Figure 31: Travel Preferences — TMC Profile ID

4.10 Approval Routing

Default document approval routing information is stored in your profile. Click the **View Approval Routing** link in the Other Features section of the User Profile page to display the Routing Rules page. The page allows you to review the routing templates and individual routing rules assigned to your user account.

TIP: If your approval routing information is incorrect or needs to be changed, or if your profile does not include approval routing information, contact the Travel Assist Team for assistance.
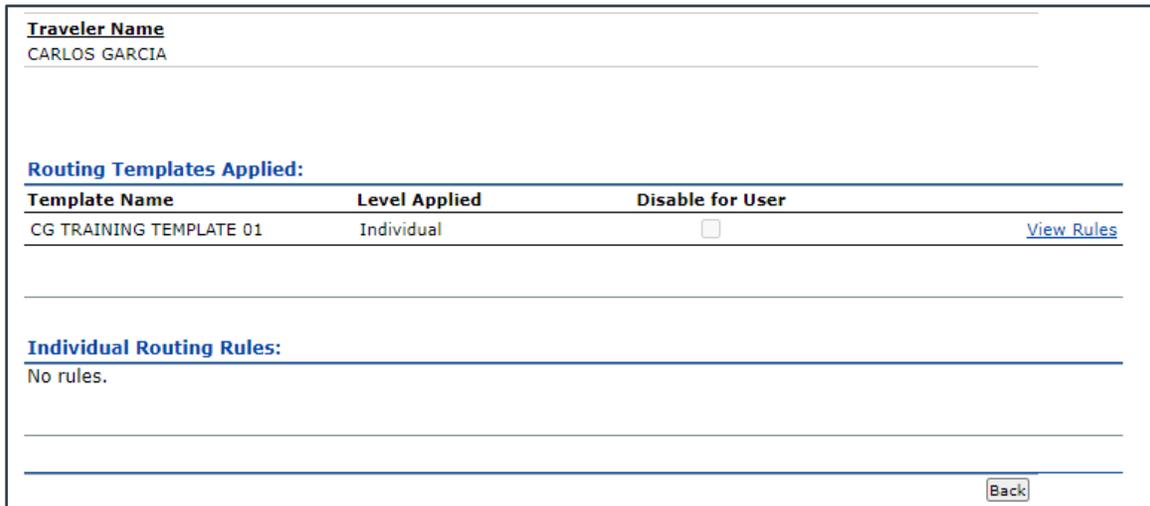
Figure 32: Approval Routing — View Approval Routing

*TIP: Click a **View Rules** link in the Routing Templates Applied data grid to view a list of all routing rules associated with the corresponding template. Click the **Hide Rules** link to collapse the expanded list of rules.*

4.11 Email Notifications

Many actions in E2 result in notifications to interested parties via email. For example, approval of a document results in an email notification. The recall of a document triggers an email to the assigned approver or group of approvers. Changing a password in E2 sends an email notification to the user.

Click the **Edit Email Notifications** link in the Other Features section on the User Profile page to display the Email Notifications page and manage your email subscriptions. By default, you are automatically "subscribed" to all E2 emails. Your travel policy, however, may allow you to opt out of receiving certain E2 emails. If you have received an email that has been customized to allow you to manage subscriptions, a description of that email type and category displays in the Email Notifications data grid.
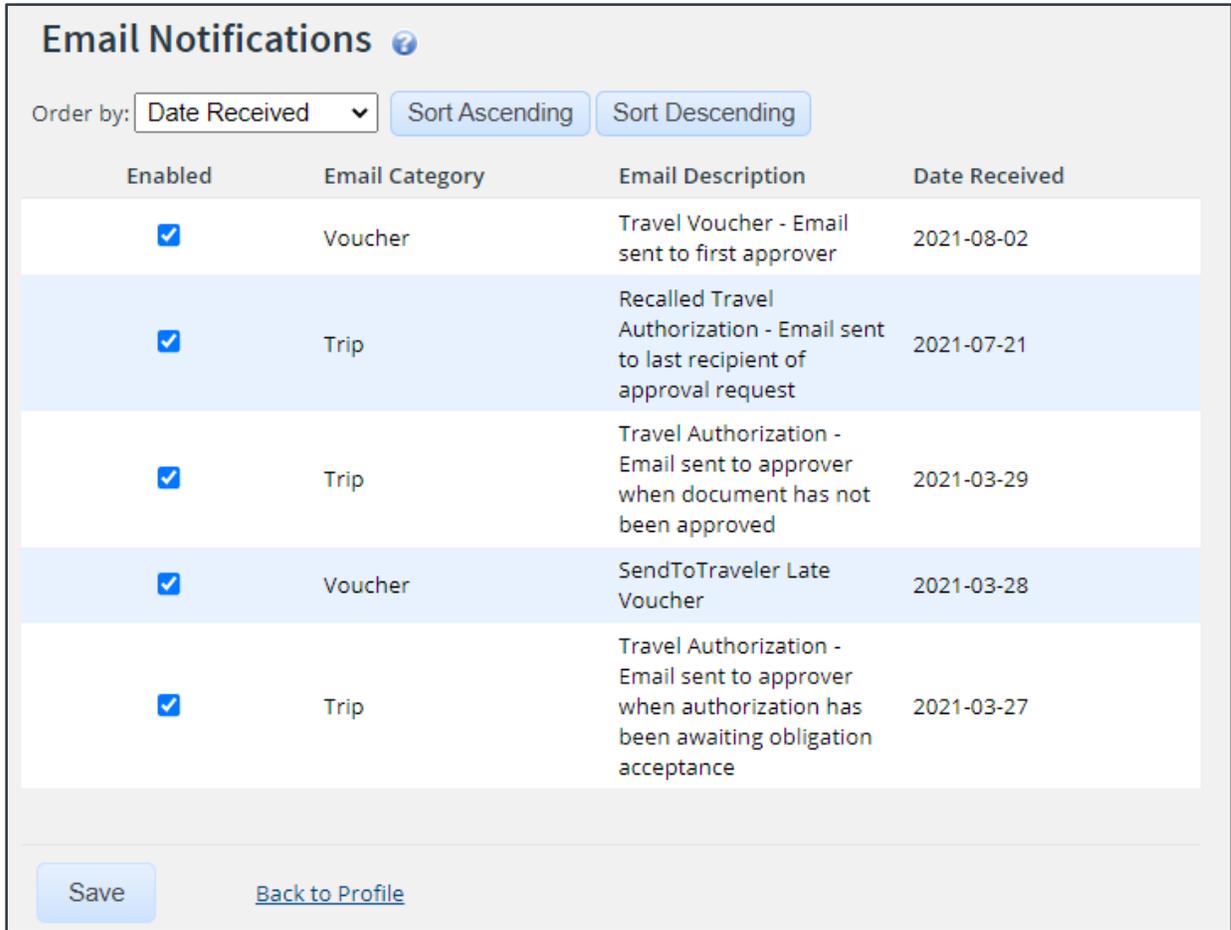
Figure 33: Email Notifications page

4.11.1   Opt Out of Receipt of an Email

Complete the following steps to disable an email notification.

1. Locate the email in the data grid.
2. Clear the **Enabled** check box.
3. Click the **Save** button to save your selection.

4.11.2   Subscribe to an Email You Previously Opted Not to Receive

Complete the following steps to re-enable an email notification that was previously disabled.

1. Locate the email in the data grid.
2. Select the **Enabled** check box. A check mark displays in the box.
3. Click the **Save** button to save your selection.

4.12 *Favorite Accounting Codes*

In addition to travel documents, funds manager approvers may also save favorite account codes to a Favorites list in their E2 user profile, if the account code has been previously added to a document. Click the **Edit Favorite Accounting Code** link in the Other Features section on the User Profile page to display the Favorite Accounts page.

Figure 34: Favorite Accounts — No favorites available

Complete the following steps to add favorite account codes to your profile.

1. Click the **Search** button. This displays the Accounting Codes Search window.
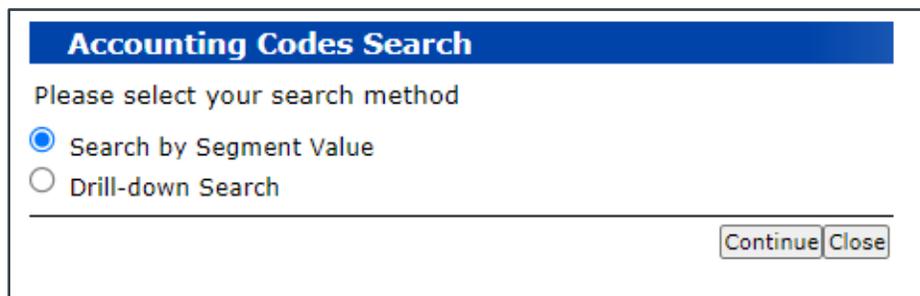
Figure 35: Accounting Codes Search — Radio buttons

2. Select one of the following radio buttons to indicate the type of search you would like to perform.

   TIP: If no radio buttons are available, the type of search you can perform is fixed. Continue to the next step.

   - **Search by Segment Value** – Select this radio button to search for an account code based on a value contained in a specific segment.
   - **Drill-down Search** – Select this radio button to search for an account code by segments in descending order.

3. Click the **Continue** button. The Accounting Codes Search window refreshes to display the fields to be used for the selected search.
   - If you selected the **Search by Segment Value** radio button, enter the values of the account code segments on which you want to search in the available fields.
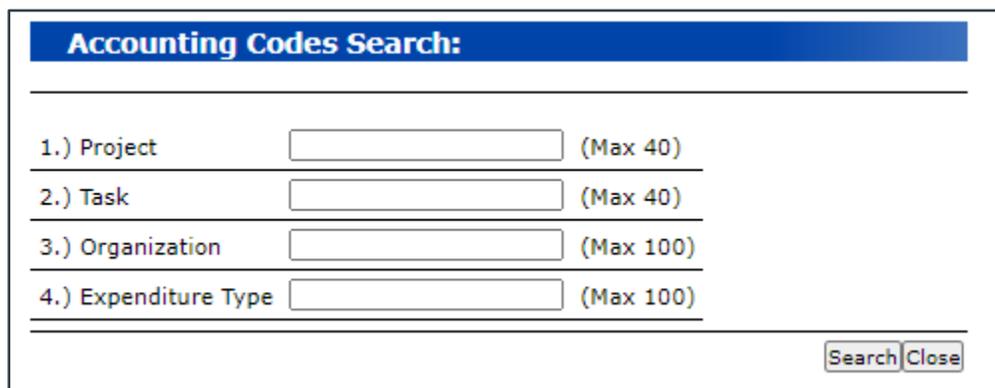
Figure 36: Accounting Codes Search — Search by Segment Value fields

- If you selected the **Drill-down Search** radio button, select a value from the first drop-down list, and then click the **Refine Search** link. Repeat this process until you have selected the necessary search criteria.

Figure 37: Accounting Codes Search — Drill-down Search fields

4. Click the **Search** button. The Accounting Codes Search window refreshes to display the list of account codes matching your search criteria.

Figure 38: Accounting Codes Search — Search results

5. Select the check box to the right of each account code you want to add as a favorite.
6. Click the **Select** button at the bottom of the window. When the Accounting Codes Search window refreshes, the check box for any account code added as a favorite will be checked and disabled.
7. Repeat these steps to search for and select additional account codes.
8. Click the **Close** button, when you are finished, to close the Accounting Codes Search window and return to the Favorite Accounts page. All selected favorite account codes will be listed in the data grid on the page.

Figure 39: Favorite Accounts — Favorite account codes

4.12.1 "Personalize" an Account Code Favorite

Once an account code has been added as a favorite, you can assign a name to the code to help you quickly identify it when allocating travel expenses. You can also choose, if appropriate, to make the account code available for use with local travel claims. With the Favorite Accounts page displayed, complete the following steps.

1. Click the account code string link. The full account code string displays below the data grid on the Favorite Accounts page.

Figure 40: Favorite Accounts — Selected account code

2. Enter your name for the account code in the **Description** field.
3. Select the **Local Travel** check box to make the account code available for local travel claims.
4. Click the **Save** button to save your entries.

4.12.2 Delete an Account Code Favorite

With the Favorite Accounts page displayed, complete the following steps to delete a favorite account code from your E2 user profile.

1. Locate the account code you want to remove in the data grid, and then click the corresponding **Delete** link on the right side of the row.
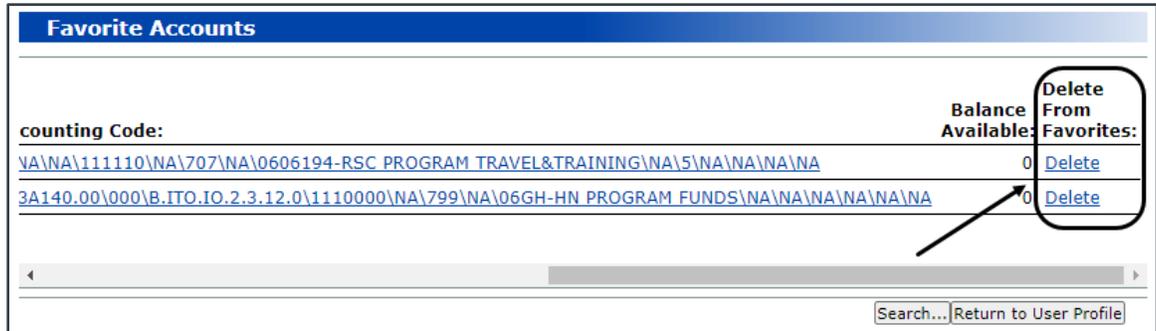
Figure 41: Favorite Accounts — Delete link

2. A pop-up window displays the message *Are you sure you want to delete?* Click the **OK** button to confirm your actions, or click the **Cancel** button to cancel the request and leave the account code as a favorite.

4.13 Password & Security Questions

You can change your password and security questions by clicking the **Edit Password Information** link in the Other Features section on the User Profile page. Passwords are active for a maximum of 90 days. You will be notified as your password expiration date nears.

NOTE: Passwords can only be changed by a user. Your Travel Assist Team, though, can reinitialize your security credentials, requiring you to reset your security profile and choose a new password. If you receive an access reset or reinitialization email, follow the link in the message to reset your security profile.

4.13.1 Edit Password Information Authentication

The Edit Password Information Authentication section displays directly on the User Profile page after clicking the **Edit Password Information** link. Before continuing, you must verify your security information by entering your current password or the answers to your security questions.
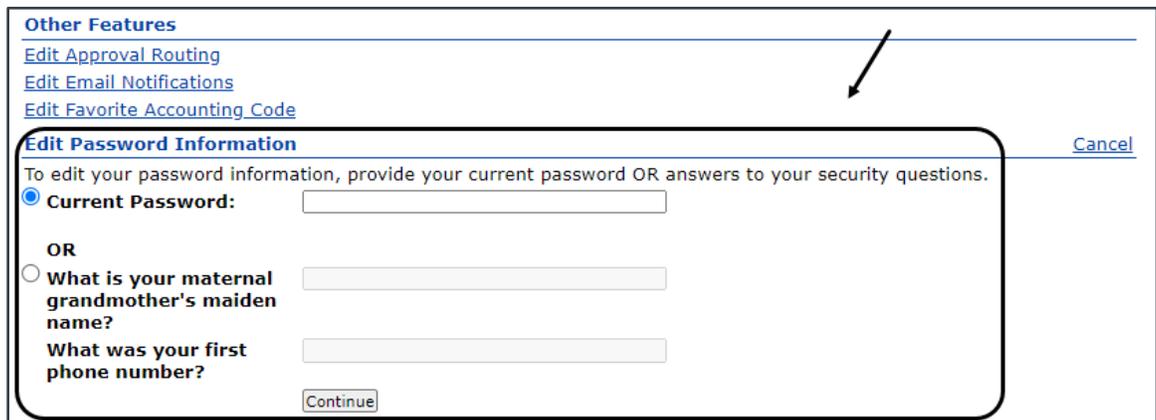

Figure 42: Profile — Edit Password Information Authentication section

Complete the following steps.

1. Click the radio button next to the **Current Password** label or your security questions to indicate the information you will provide.
2. Enter the requested information in the corresponding field(s).

3. Click the **Continue** button. This displays the Edit Password Information page.

4.13.2   Edit Password Information Page

The Edit Password Information page allows you to update your password and/or security questions.

TIP: If you wish to change your security questions before it is time to update your password, you can skip directly to the security questions section on the page. You do not need to enter new password information if you want to only change your security questions.

Figure 43: Edit Password Information page

Complete the following steps.

1. Enter a new password in the **New Password** field.

   NOTE: Password requirements differ, but your password must include at least one uppercase character, one lowercase character, one number, and one special character (e.g., !, @, #, etc.). The first character in your password should be a letter (e.g., Mypswd#1).

2. Confirm the new password by entering it in the **Confirm New Password** field.

3. Select a security question from the **First Security Question** drop-down list.

   TIP: A security question should refer to an answer that only you will know. If you forget your password, this security information (along with the primary email address from your profile) will be used to verify your identity and assist you with resetting your password. When verifying your identity, security answers are not considered case sensitive.

4. Enter the answer to the first security question in the **Security Answer** field.

5. Confirm your answer to the first security question by reentering the answer in the **Confirm Security Answer** field.

6. Repeat steps 3–5 for the **Second Security Question**, **Security Answer**, and **Confirm Security Answer** fields.

> ***NOTE***: *Each security answer must be unique; the answer for the first security question cannot be the same as the answer for the second security question.*

7. Click the **Save** button. You are returned to the User Profile page where a message displays indicating your credentials were successfully updated. The system also sends an email to the primary email address in your profile confirming that your password was changed.

4.14 Tax Information

Long-term taxable travel applies to travel that is one year (i.e., 365 days) or longer in length and that uses a travel type that allows long-term taxable travel calculations. When your trip meets these conditions, E2 uses the information on the Edit Tax Information page to determine the appropriate tax calculations for the trip. Click the **Edit Tax Information** link in the Other Features section of the User Profile page to display the Edit Tax Information page.

Figure 44: Edit Tax Information page

Populate the following fields, and then click the **Save** button to save your entries.

- **Payroll State** – Select the state that should be used to calculate state tax information (i.e., typically the state in which you reside and pay taxes) from the drop-down list.
- **Retirement System** – Select your retirement system (i.e., *Civil Service Retirement System (CSRS)* or *Federal Employees Retirement System (FERS)*) from the drop-down list.
- **OASDI Indicator** – Select the appropriate Old Age, Survivor, and Disability Insurance (OASDI) indicator from the drop-down list.
  - Select *Q (FICA not Withheld)* if FICA is not withheld from your paycheck. (This typically occurs when your retirement system is CSRS).
  - Select *R (FICA Withheld)* if FICA is normally withheld from your paycheck.
- **Withholding Tax Allowance (WTA)** – Select *Yes* or *No* from the drop-down list to indicate whether E2 should calculate withholding tax allowance information.

4.15 Printable Profile

Click the **Printable Profile** link in the Other Features section on the User Profile page to generate a printable version of the E2 user profile in a new browser window. Click the **Print This Page** button to print the profile, or click the **Close** button to close the window and return to the User Profile page.

Figure 45: Printable Profile window

4.16 Profile Supplement

Click the **Profile Supplement** link in the Other Features section of the User Profile page to access the Profile Supplement page. This page allows you to enter optional information that can be added to your E2 user profile and used for reporting purposes.

Click the arrow to the right of each section header to expand that section and view or update the corresponding information. Click the **Save** button when you are finished to save your entries.

Figure 46: Profile Supplement page

4.16.1 Personal Information

Select an option from the **Traveler Security Clearance** drop-down list (e.g., *None*, *Confidential*, *Secret*, *Top Secret*) to indicate your security clearance level.

Figure 47: Profile Supplement — Personal Information section

4.16.2 Travel Contact Information

Use the fields in the Travel Contact Information section to establish your office and residence addresses, as well as a special address, if necessary.

- **Street Address 1** – Enter up to 32 alpha-numeric characters for the first address line from the corresponding address.
- **Street Address 2** – Enter up to 32 alpha-numeric characters for the second address line from the corresponding address.
- **City** – Enter up to 40 alpha-numeric characters for the city from the corresponding address.
- **State/Province** – Enter up to 20 alpha-numeric characters for the state or province from the corresponding address.
- **Country** – Select the country from the corresponding address from the drop-down list.
- **Zip/Postal Code** – Enter up to 20 alpha-numeric characters for the zip or postal code from the corresponding address.
- **Telephone Number** – Enter up to 32 alpha-numeric characters for the telephone number associated with the residence or special address.

Figure 48: Profile Supplement — Travel Contact Information section

4.16.3   Emergency Contact Information

Use the fields in the Emergency Contact Information section to establish the name, address, and contact information for your primary emergency contact.

Figure 49: Profile Supplement — Emergency Contact Information section

4.16.3.1   Emergency Contact Name

The following fields are available in the Emergency Contact Name sub-section.

- **Name Prefix** – Enter up to 10 alpha-numeric characters for the name prefix for your emergency contact.
- **First Name** – Enter up to 20 alpha-numeric characters for the first name of your emergency contact.
- **Middle Name** – Enter up to 20 alpha-numeric characters for the middle name of your emergency contact.
- **Last Name** – Enter up to 20 alpha-numeric characters for the last name of your emergency contact.

4.16.3.2   Emergency Contact Address

The following fields are available in the Emergency Contact Address sub-section.

- **Street Address 1** – Enter up to 32 alpha-numeric characters for the first address line from your emergency contact's address.
- **Street Address 2** – Enter up to 32 alpha-numeric characters for the second address line from your emergency contact's address.
- **City** – Enter up to 40 alpha-numeric characters for the city from your emergency contact's address.
- **State/Province** – Enter up to 20 alpha-numeric characters for the state or province from your emergency contact's address.
- **Country** – Select the country from your emergency contact's address from the drop-down list.
- **Zip/Postal Code** – Enter up to 20 alpha-numeric characters for the zip or postal code from your emergency contact's address.
- **County** – Enter up to 40 alpha-numeric characters for the county from your emergency contact's address.

4.16.3.3   Emergency Contact Phone

The following fields are available in the Emergency Contact Phone sub-section.

- **Country Code** – Enter up to three characters for the country code from your emergency contact's phone number.
- **Area/City Code** – Enter up to 10 characters for the area or city code from your emergency contact's phone number.
- **Phone Number** – Enter up to 32 characters for your emergency contact's phone number.
- **Extension** – Enter up to 10 characters for the extension from your emergency contact's phone number.

5 Managing Your Dependents

You can manage any dependents (i.e., spouse/partner, dependent child, dependent parent, and/or dependent sibling) that may travel with you on the Manage Dependents page. Any dependents listed on this page will be available for selection when creating a new authorization.

Click the User Options menu in the task bar (i.e., your name), and then select *Manage Dependents* from the drop-down list to display the Manage Dependents page.
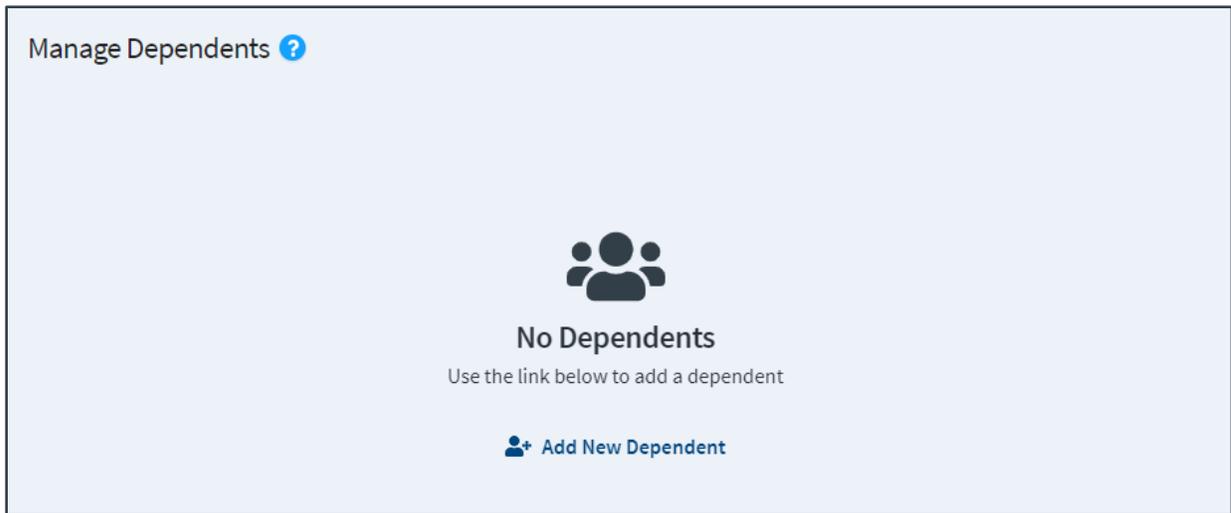

Figure 50: Manage Dependents — No Dependents
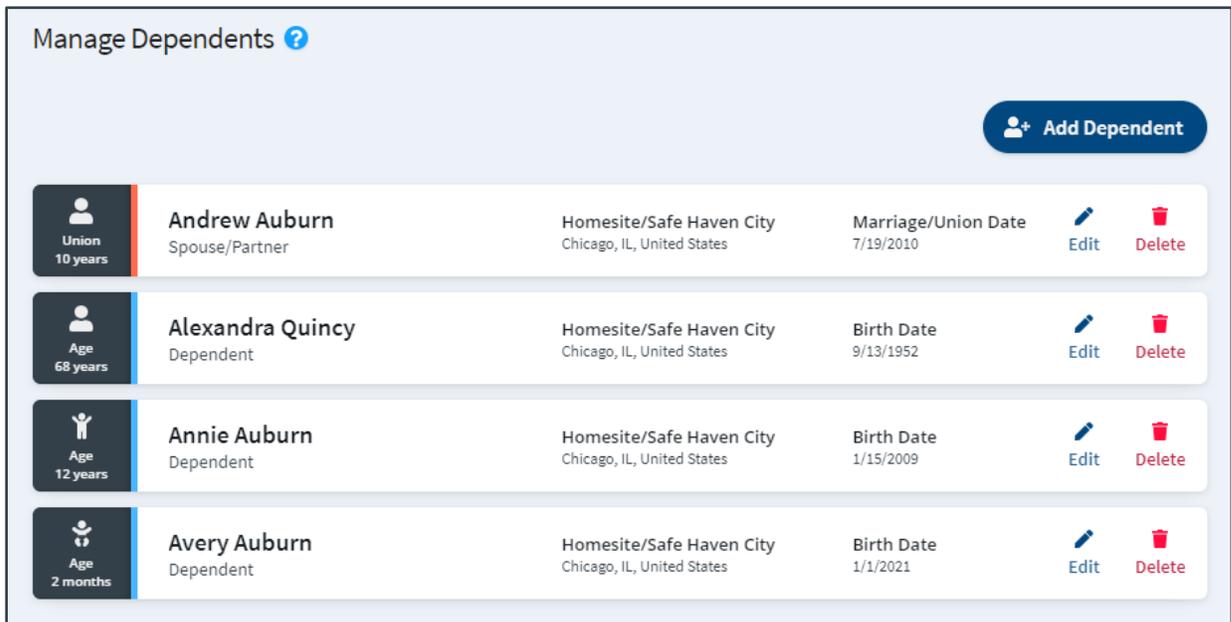
Figure 51: Manage Dependents — Existing Dependents

The page lists every dependent currently associated with your E2 user account, including their name, age, relationship to you, home site / safe haven location, and birth or marriage/union date. Records are sorted by relationship, with any spouse/partner record listed first. These records are sorted by your date of marriage/union, with the record with the longest marriage/union listed first. "Dependent" records are

then sorted by date of birth, with the oldest dependent listed first. For any dependents with the same date of birth, these records will be listed in alphabetical order based on last name and then first name.

Select from the following options to maintain your dependent information:

- Click the **Add New Dependent** button to display the Add Dependent page, which allows you to add a new dependent.
- Click an **Edit** icon ( ) to open the Edit Dependent page, which allows you to maintain the details of that particular record.
- Click a **Delete** icon ( ) to delete that particular record.

5.1   Add a Dependent

The Add Dependent page displays when you click the **Add New Dependent** button on the Manage Dependents page. Enter the dependent's information in the available fields, and then click the **Add** button to add a record for the dependent to E2 Solutions and return to the Manage Dependents page.

*TIP: Click the **Cancel** button at any time before clicking **Add** to clear your entries and return to the Manage Dependents page.*

Figure 52: Add Dependent page

5.1.1   Fields

The following table lists the fields available on the Add Dependent page. An asterisk (*) indicates the field is required to save the record.

Field	Description
First Name *	Enter up to 35 alpha-numeric characters for the dependent's first name.
Middle Name	Enter up to 35 alpha-numeric characters for the dependent's middle name.
Last Name *	Enter up to 35 alpha-numeric characters for the dependent's last name.
Relationship *	Select one of the following options from the drop-down list to indicate the dependent's relationship to you. • **Dependent** – Select this option if the individual is your dependent child, parent, or sibling.

Field	Description
	• **Spouse/Partner** – Select this option if the individual is your spouse or domestic partner.
Date Field *	The label for this field changes based on the option selected from the **Relationship** drop-down list. • **Birth Date** – If you selected *Dependent*, enter the dependent's birth date in the field (formatted MM/DD/YYYY), or click the calendar icon to select the date from the drop-down calendar. • **Marriage/Union Date** – If you selected *Spouse/Partner*, enter the date of your marriage/union in the field (formatted MM/DD/YYYY), or click the calendar icon to select the date from the drop-down calendar.
Homesite / Safe Haven City *	Enter the first three or more characters from the name of your home site or safe haven city in the field, pause, and then select the city from the drop-down list. *NOTE: The safe haven location is the CONUS or OCONUS city to which the dependent is temporarily sent in the event of an evacuation.*

5.2   Edit a Dependent

The Edit Dependent page displays when you click the **Edit** icon ( ) for a dependent listed on the Manage Dependents page. Edit the dependent's information as needed, and then click the **Save** button to save your changes and return to the Manage Dependents page.

*TIP: Click the **Cancel** button at any time before clicking **Save** to void your entries and return to the Manage Dependents page, leaving the record unchanged.*

5.3   Delete a Dependent

Click the **Delete** icon ( ) for a dependent listed on the Manage Dependents page to delete that record. When the *Delete dependent* confirmation window displays, click the **Yes** button to delete the dependent, or click the **No** button to cancel the request and leave the dependent unchanged.

When you delete a dependent, the record will be removed from your Manage Dependents list and you will no longer be able to add that individual as a dependent on a new trip.

- If the dependent was not associated with any trips, they will be removed completely from the system.
- If the dependent was associated with existing trips, the record will be archived to ensure the dependent is still visible on those trips.

6   Revision History

Date	Description	Release
01/2022	Added a bullet to section 4.8.1 (Modifying Existing Credit Card Information)	22.1
10/2021	Document creation	21.4

7   Trademark and Copyright

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