



# USCG UG90: Taking Other Trip Actions

Closing a Trip, Canceling a Trip, and Creating Trip Templates  
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## Table of Contents

<b>1</b>	<b>INTRODUCTION .....</b>	<b>3</b>
<b>2</b>	<b>GETTING STARTED WITH TRIP ACTIONS .....</b>	<b>4</b>
2.1	Trip Dashboard .....	4
<b>3</b>	<b>CANCELING A TRIP .....</b>	<b>5</b>
<b>4</b>	<b>CLOSING A TRIP .....</b>	<b>7</b>
<b>5</b>	<b>COPY TRIPS .....</b>	<b>8</b>
5.1	Copy an Existing Trip .....	8
5.2	Copy Another User's Trip .....	9
5.3	Working with Trip Templates .....	10
<b>6</b>	<b>REVISION HISTORY .....</b>	<b>14</b>
<b>7</b>	<b>TRADEMARK AND COPYRIGHT .....</b>	<b>14</b>

# 1 Introduction

This document contains information regarding the trip 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.

## 2 Getting Started with Trip Actions

Trip actions include:

- [Canceling a trip](#)
- [Closing a trip](#)
- [Copying a trip](#)
- [Working with trip templates](#)

### 2.1 Trip Dashboard

Most trip actions are initiated from the Trip Dashboard. Select one of the following options to access the Trip Dashboard:

- Click the **Show** link for the trip on the My E2 **Trips** tab.
- Click a link in your To Do List on the My E2 **At a Glance** tab.

**TIP:** *If you land in a document workflow, click the **Trip Dashboard** tab.*

### 3 Canceling a Trip

When plans change, you may need to cancel a trip that has already been approved. If the **Cancel Trip** link is available on the Trip Dashboard, you can cancel the trip.

- If you need to submit certain expenses for reimbursement, E2 automatically creates a single voucher for that purpose.
- If the trip includes reservations, you can cancel the reservations or you can retain them. If you choose to retain the reservations, they are placed in your held reservations list, and are immediately available for association with another authorization or trip.

Complete the following steps.

1. Access the Trip Dashboard.
2. Click the **Cancel Trip** link in the Extras section. This displays a Confirm Action window.

*Figure 1: Cancel Trip Confirm Action window*

3. Select one of the following options from the **File Expenses** drop-down list.
  - **I do not have any expenses to claim. Cancel my trip.** – Select this option if you do not have any expenses to claim for your trip.
  - **I am no longer traveling but I have expenses to claim.** – Select this option if you do have expenses to claim.
4. If the trip includes a reservation, select one of the following options from the **Delete Reservations** drop-down list.
  - **Delete the reservations** – Select this option to cancel the reservations associated with the trip.
  - **Move the reservations to my held reservations list** – Select this option to retain the reservations associated with the trip, and move them to the held reservations list.

**Confirm Action**

**All advances and vouchers will be canceled with your trip.**

File Expenses:\* I do not have any expenses to claim. Cancel my trip. ▾

Delete Reservations:\*

- Please select.
- Delete the reservations.
- Move the reservations to my held reservations list.

\* Required

**Confirm** Cancel

**Figure 2: Cancel Trip Confirm Action — Delete Reservations field**

5. Click **Confirm**. If you had expenses to file (i.e., selected *I am no longer traveling but I have expenses to claim*), E2 creates a final voucher and takes you to the voucher's Basic Information page. This allows you to complete the voucher and submit your expenses for approval.

**WARNING:** Do not delete the voucher; you will be unable to create another one. If you made the selection in error or no longer need to file out-of-pocket expenses for the canceled trip, submit the voucher with no expenses.

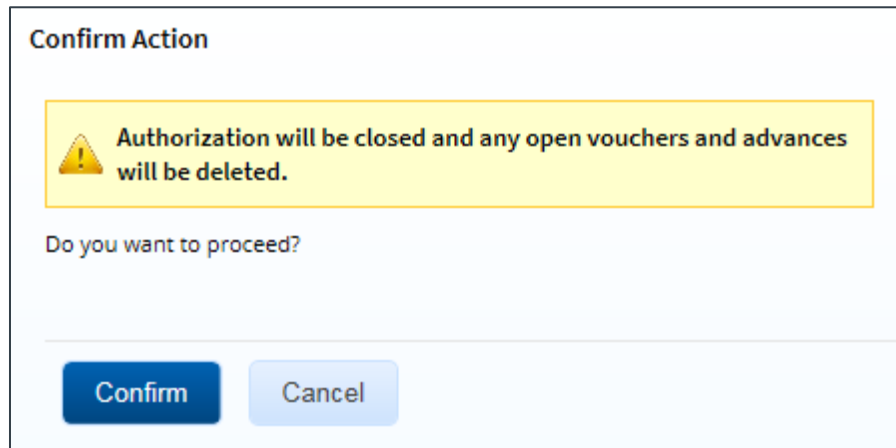
## 4 Closing a Trip

A trip is automatically closed after your final voucher is approved and paid. If you forget to make a voucher as final, or if you have no additional expenses to file and existing vouchers cover the span of the trip, you can manually close the trip. Closed trips can be archived and removed from your active trips list on the **Trips** tab.

**TIP:** *If your only trip voucher is a pre-trip voucher and you have no additional trip expenses to claim, you cannot close the trip. You must create a voucher with no expenses that covers all trip days and identifies the voucher as the final voucher (on the voucher's Basic Information page). After that voucher is approved, the trip is automatically closed.*

Complete the following steps.

1. Access the Trip Dashboard.
2. Click the **Close Trip** link in the Extras section. This displays a Confirm Action window.



*Figure 3: Close Trip Confirm Action window*

3. Click **Confirm**.
  - The status of the authorization changes from *Approved* to *Closed*.
  - Any open vouchers or advances are deleted.
  - The last incremental voucher is flagged as the final voucher.

## 5 Copy Trips

You can create a new authorization by:

- [Copying your own trip](#)
- [Copying a trip from another user in your office or workgroup](#)
- [Using a trip template](#)

When you copy a trip or use a trip template, the new authorization is automatically created and assigned a trip ID. The following information is copied from the original trip or template:

- Type of travel and travel purpose
- Site details, including locations and modes of transportation, using the new trip start date
- Estimated expenses and expense types (per diems are updated based on new travel dates)

### 5.1 Copy an Existing Trip

Complete the following steps to copy one of your own existing trips.

1. Click the My E2 **Trips** tab.
2. Locate the trip you want to copy in the list.
3. Click the **Copy** link. This displays the Copy Trip page.

**Figure 4: Copy Trip page**

**NOTE:** You cannot copy a trip created under a different set of regulations than those which you currently follow. If you click the **Copy** link for a trip created under one set of regulations (e.g., FTR, or Federal Travel Regulations) while you are currently under a different set of regulations (e.g., JTR, or Joint Travel Regulations), an error message displays and you are prevented from continuing.

4. Enter the date the new trip will start in the **New Trip Start Date** field, or click the calendar icon to select the date from the drop-down calendar.
5. Click **Copy**.
  - If you have existing open authorizations (OAs), you can associate the copied trip with an OA.
  - When the trip is copied, you are automatically taken to the **Authorization** tab and the Basic Information page for that trip. The new authorization has been created.



## 5.2 Copy Another User's Trip

If you know the trip ID, you can copy an authorization from another user in your office or workgroup. Complete the following steps.

1. Click the My E2 **Trips** tab.
2. Click the **Copy From Another Trip** button. This displays the Trip Templates page.
3. Click the **Search** tab. This displays the Copy from Another Trip page.

The screenshot shows a web interface titled "Copy from Another Trip". At the top left, there are two tabs: "Trip Templates" and "Search", with "Search" being the active tab. Below the tabs is a section titled "Search Options". Inside this section, there is a label "Trip Id:" followed by an empty text input field. Below the input field, there is a note "\*Required". At the bottom of the form, there are two buttons: a blue "Search" button and a light blue "Cancel" button.

Figure 5: Copy from Another Trip — Search Options

4. Enter the trip ID of the trip you want to copy in the **Trip Id** field.
5. Click **Search**. The page updates to show site details from the trip you want to copy.

The screenshot shows the "Copy from Another Trip" page after a search. The title "Copy from Another Trip" is at the top. Below it is a section titled "Site Details". This section contains two expandable cards. The first card is expanded and shows the text "[Site 1] Begin: Washington, DC, United States on 01-Mar-2018 to Christchurch, New Zealand" with a downward arrow. The second card is collapsed and shows "[Site 2] End: Christchurch, New Zealand on 09-Mar-2018 to Washington, DC, United States" with an upward arrow. Below these cards is a list of trip details:
 

- Returning Date: 09-Mar-2018
- Returning From: Christchurch, New Zealand
- Returning To: Washington, DC, United States
- Arrival Date: 09-Mar-2018
- Arrival Time: 10:00 PM
- Mode of Transportation: Commercial Plane
- International Date Line: IDL-East

 At the bottom of the form, there are two buttons: a blue "Continue" button and a light blue "Cancel" button.

Figure 6: Copy from Another Trip — Site Details

**NOTE:** You cannot copy a trip that was created under a different set of regulations than those which you currently follow. If you attempt to copy a trip that was created by a user following a different set of regulations than you or the user for whom you are arranging travel (e.g., you are an FTR traveler, but the trip you want to copy was created by a JTR traveler), an error message displays and you are prevented from continuing.

6. Expand each site section to review the information and confirm that the displayed trip is the one you want to copy.
7. Click **Continue**. This displays the Copy Trip page.
8. Enter the date the new trip will start in the **New Trip Start Date** field, or click the calendar icon to select the date from the drop-down calendar.
9. Click **Copy**.
  - If you have existing open authorizations (OAs), you can associate the copied trip with an OA.
  - When the trip is copied, you are automatically taken to the **Authorization** tab and the Basic Information page for that trip. The new authorization has been created.

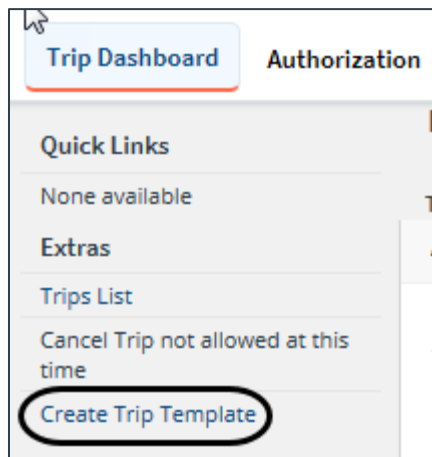
### 5.3 Working with Trip Templates

If you frequently take similar trips, creating a trip template may save you time and effort in the future. You can use a trip template to create multiple trips, and you can also share the template with other users in your office or workgroup.

#### 5.3.1 Creating a Trip Template – Trip Dashboard

Complete the following steps to create a trip template from the trip dashboard.

1. Access the Trip Dashboard.



**Figure 7: Trip Dashboard — Create Trip Template link**

2. Click the **Create Trip Template** link in the Extras section. This displays the Create Trip Template window.

Figure 8: Create Trip Template window

3. Enter the name of the template in the **Trip Template Name** field.
4. If you want to make the template available to other travelers in your office or workgroup, select the **Share with Minor Customer** check box.
5. Click **Save and Close** to save the template and close the Create Trip Template window. The **Create Trip Template** link on the Trip Dashboard is replaced by the **Update Trip Template** and **Remove Trip Template** links.

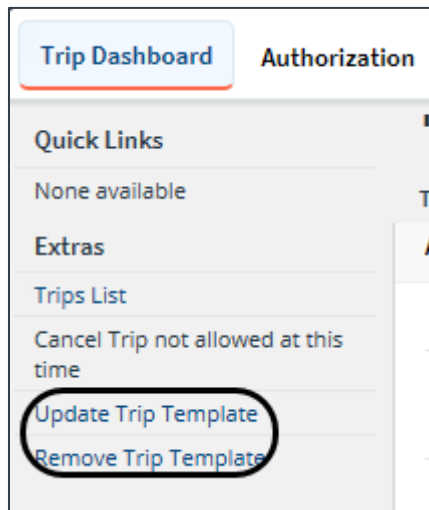


Figure 9: Trip Dashboard — Update and Remove Trip Template links

### 5.3.2 Updating a Trip Template

After creating a template, you can change the template's name or change your sharing selection. Complete the following steps to update the template.

1. Access the Trip Dashboard.
2. Click the **Update Trip Template** link in the Extras section. This displays the Update Trip Template window.

Figure 10: Update Trip Template window

3. Make your changes. You can change the template's name. If you change the name, you can also change your sharing selection.
4. Click **Save and Close** to save your changes, update the template, and close the Update Trip Template window.

### 5.3.3 Removing a Trip Template

Complete the following steps to remove a trip template.

1. Access the Trip Dashboard.
2. Click the **Remove Trip Template** link in the Extras section. This displays a Confirm Removal of Trip Template window.
3. Click **Confirm**. The template is deleted, the **Create Trip Template** link reappears on the Trip Dashboard, and the **Update Trip Template** and **Remove Trip Template** links are removed.

### 5.3.4 Creating an Authorization from a Trip Template

Complete the following steps to create an authorization from a trip template.

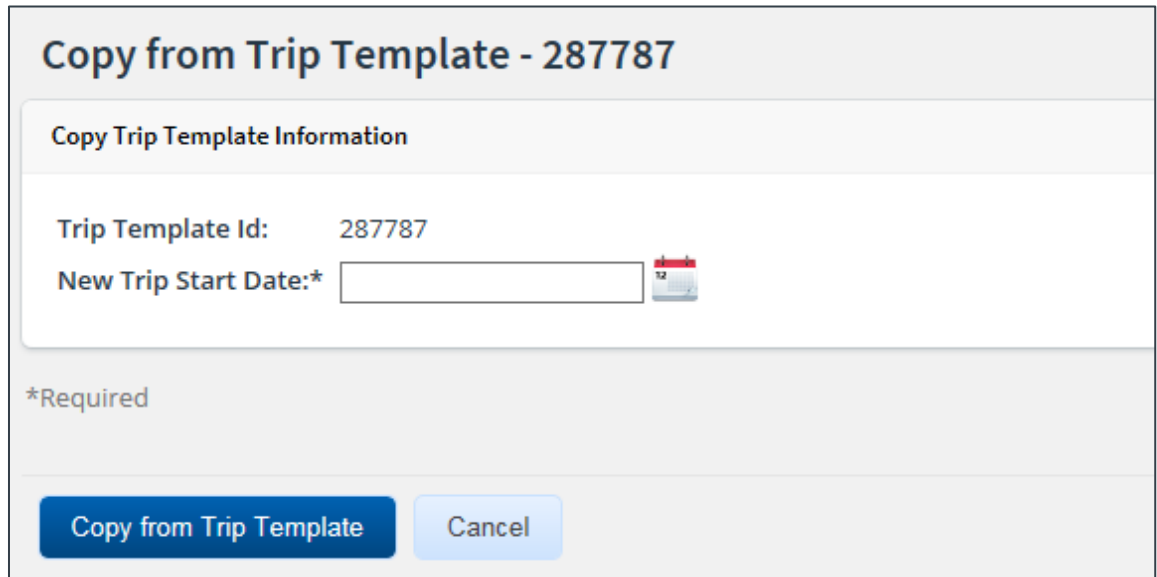
1. Click the My E2 Trips tab.
2. Click the **Copy From Another Trip** button. This displays the Trip Templates page.

Trip Id	Template Name	Destination	Shared	Show	Copy	Delete
287787	Oceania site	Christchurch, New Zealand	Yes	Show	Copy	Delete
287723	London/Wales trip	London, United Kingdom	Yes	Show	Copy	Delete

Showing 1 - 2 of 2

Figure 11: Trip Templates — Copy link


3. Locate the template you would like to use in the list.
4. Click the **Copy** link. This displays the Copy from Trip Template page.



**Copy from Trip Template - 287787**

Copy Trip Template Information

Trip Template Id: 287787

New Trip Start Date:\*  

\*Required

[Copy from Trip Template](#) [Cancel](#)

Figure 12: Copy from Trip Template page

**NOTE:** You cannot copy a trip created under a different set of regulations than those which you currently follow. If you click the **Copy** link for a trip created under one set of regulations (e.g., FTR, or Federal Travel Regulations) while you are currently under a different set of regulations (e.g., JTR, or Joint Travel Regulations), an error message displays and you are prevented from continuing.

5. Enter the date the new trip will start in the **New Trip Start Date** field, or click the calendar icon to select the date from the drop-down calendar.
6. Click **Copy from Trip Template**. The authorization is created and you are taken to the Basic Information page for the new authorization.

## 6 Revision History

Date	Description	Release
12/2021	Document creation	22.1

## 7 Trademark and Copyright

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