



UG90: Taking Other Trip Actions

Closing a Trip, Canceling a Trip, and More
Release 21.1 | April 2021

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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. Additionally, many FTR and JTR features and functionality may be subject to your agency's configurations.

2 Getting Started with Trip Actions

Most of your actions in E2 Solutions involve a specific document, like an authorization, voucher, or local travel claim. Some actions, however, impact multiple documents. Canceling a trip, for example, impacts all documents associated with the trip, including authorizations, vouchers, travel advances, and reservations.

Trip actions include:

- [Canceling a trip](#)
- [Closing a trip](#)
- [Copying a trip](#)
- [Working with trip templates](#)
- [Making reservations after authorization approval](#)

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.

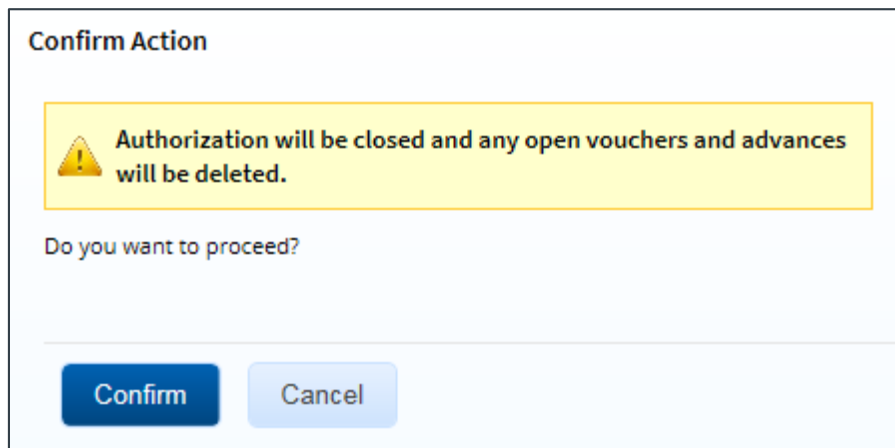


Figure 3: Close Trip Confirm Action window

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.

NOTE: *Travel policy controls your ability to make changes to a closed trip, such as creating a voucher for expenses you forgot to claim.*

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.

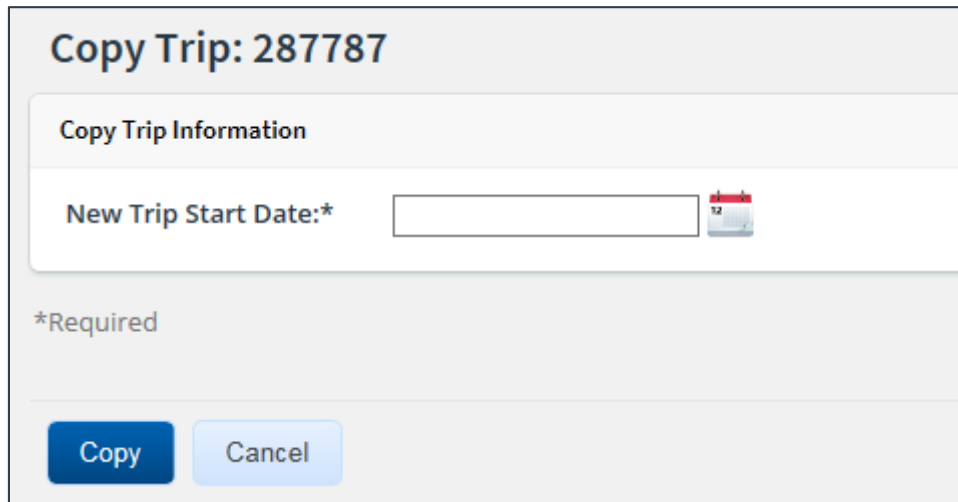


Figure 4: Copy Trip page

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.

5.1.1 Trip History

When a trip is copied, an entry displays in the history for the new authorization, indicating the trip was created by copying another trip. Click the **Trip History** link in the Other Actions section to display the Trip History page.

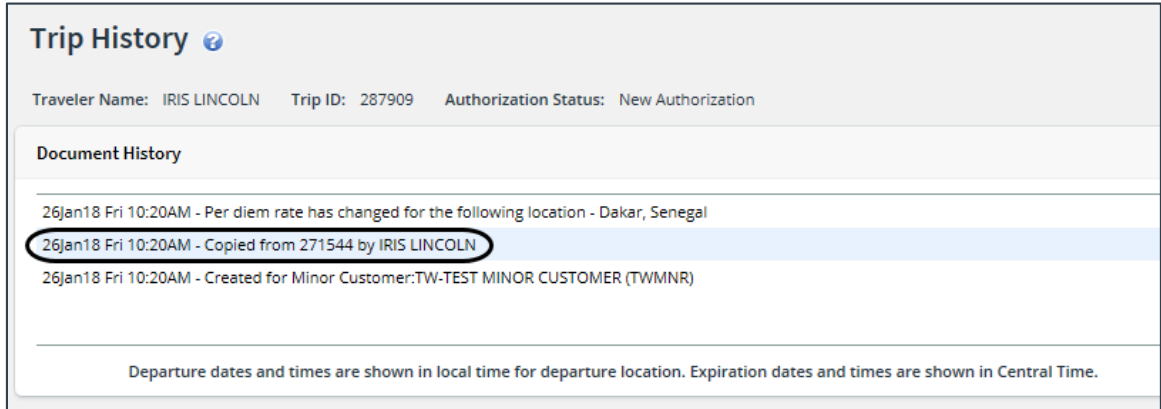


Figure 5: Trip History — Copied trip

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.

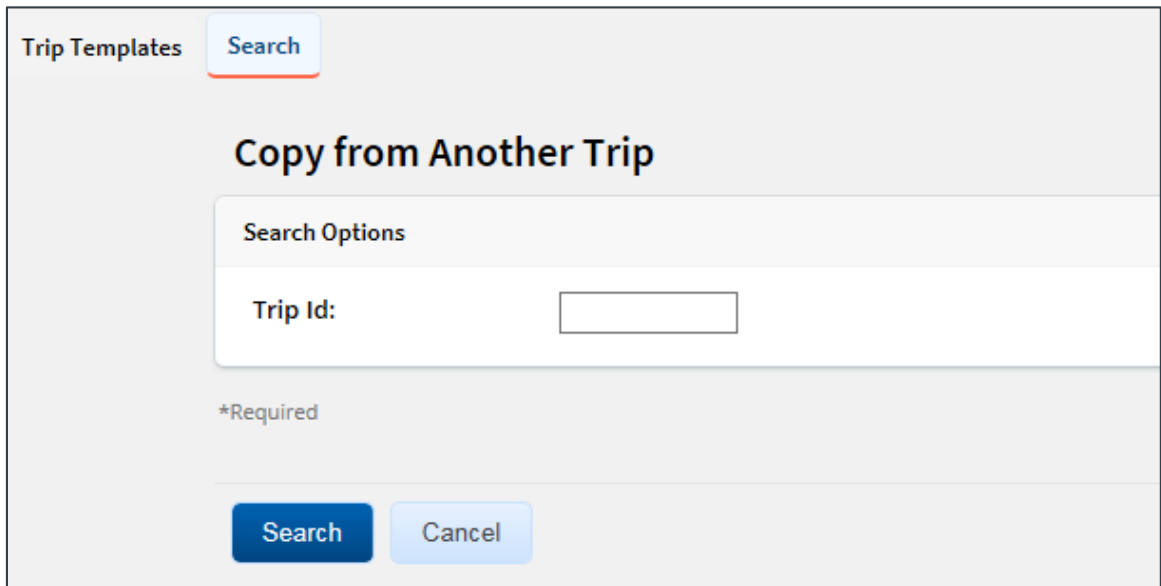


Figure 6: Copy from Another Trip — Search Options

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 a dialog box titled "Copy from Another Trip". It has a "Site Details" section with two expandable site entries. The first entry, "[Site 1] Begin: Washington, DC, United States on 01-Mar-2018 to Christchurch, New Zealand", is collapsed. The second entry, "[Site 2] End: Christchurch, New Zealand on 09-Mar-2018 to Washington, DC, United States", is expanded to show the following 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 dialog box are two buttons: "Continue" and "Cancel".

Figure 7: 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.

5.2.1 Trip History

When a trip is copied, an entry displays in the history for the new authorization, indicating the trip was created by copying another trip. Click the **Trip History** link in the Other Actions section to display the [Trip History page](#).

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.

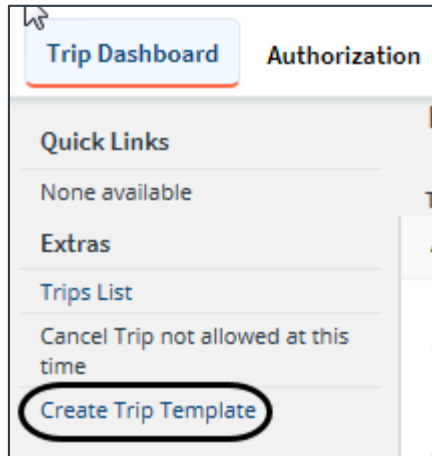


Figure 8: Trip Dashboard — Create Trip Template link

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

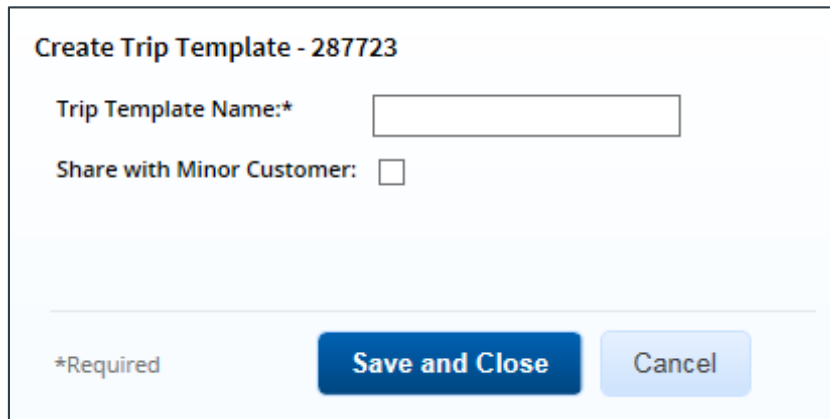


Figure 9: Create Trip Template window

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.

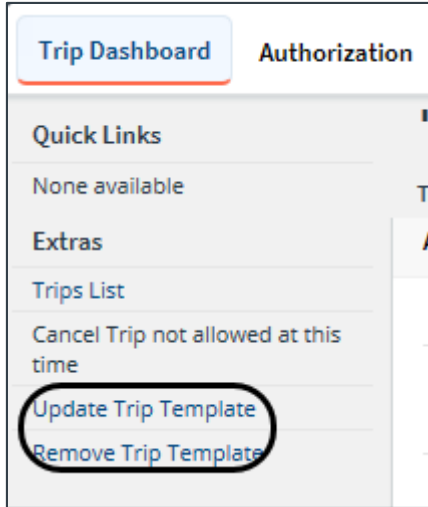


Figure 10: Trip Dashboard — Update and Remove Trip Template links

5.3.2 Creating a Trip Template – Trip Document

You can create a trip template from a trip document, such as an authorization or a voucher.

- If you create a template from the Trip Dashboard or a voucher, the template information comes from the most current version of the authorization.
- If you amended an authorization, you can create a template from the previous version of the authorization by accessing that version and creating the template from the authorization workflow.

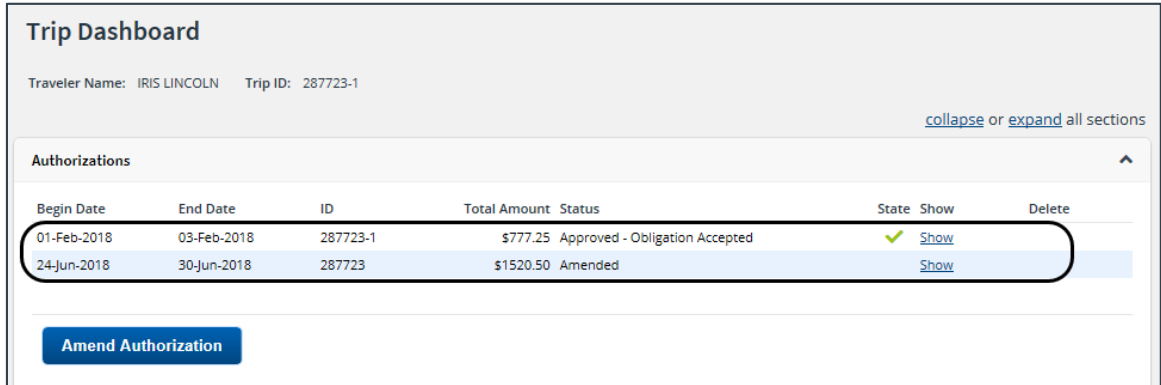


Figure 11: Trip Dashboard — Multiple versions of an authorization

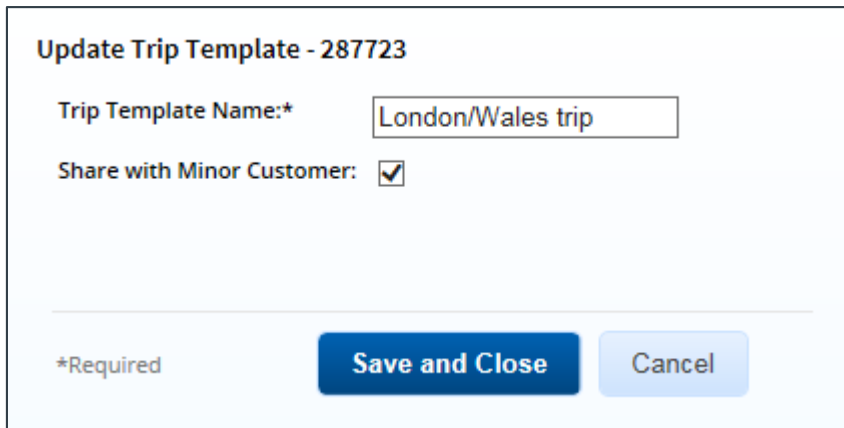
Complete the following steps.

1. Access the Trip Dashboard.
2. Click the **Show** link for the document from which you want to create the template.
3. Click the **Create Trip Template** link in the Extras section. This displays the [Create Trip Template window](#).
4. Enter the name of the template in the **Trip Template Name** field.
5. If you want to make the template available to other travelers in your office or workgroup, select the **Share with Minor Customer** check box.
6. Click **Save and Close** to save the template and close the Create Trip Template window.

5.3.3 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.



Update Trip Template - 287723

Trip Template Name:*

Share with Minor Customer:

*Required

Figure 12: 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.

5.3.4 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.

5.3.5 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.

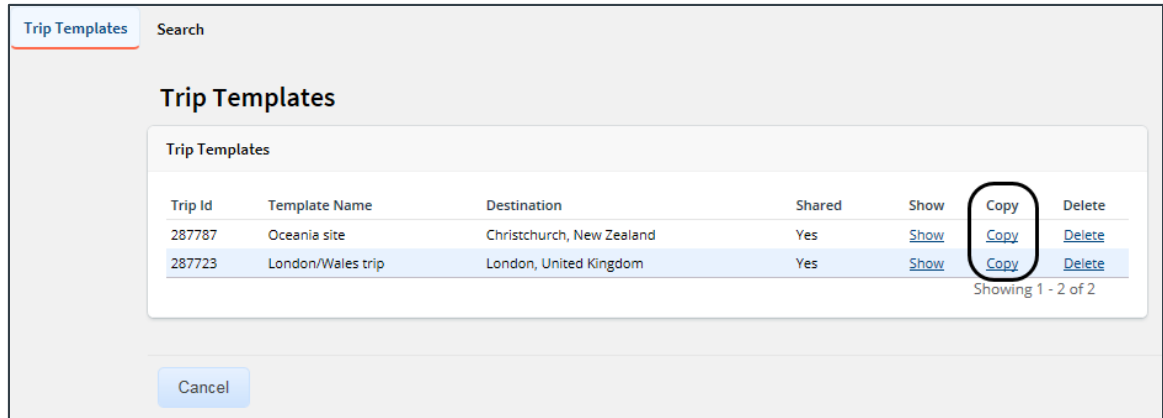


Figure 13: Trip Templates — Copy link

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.

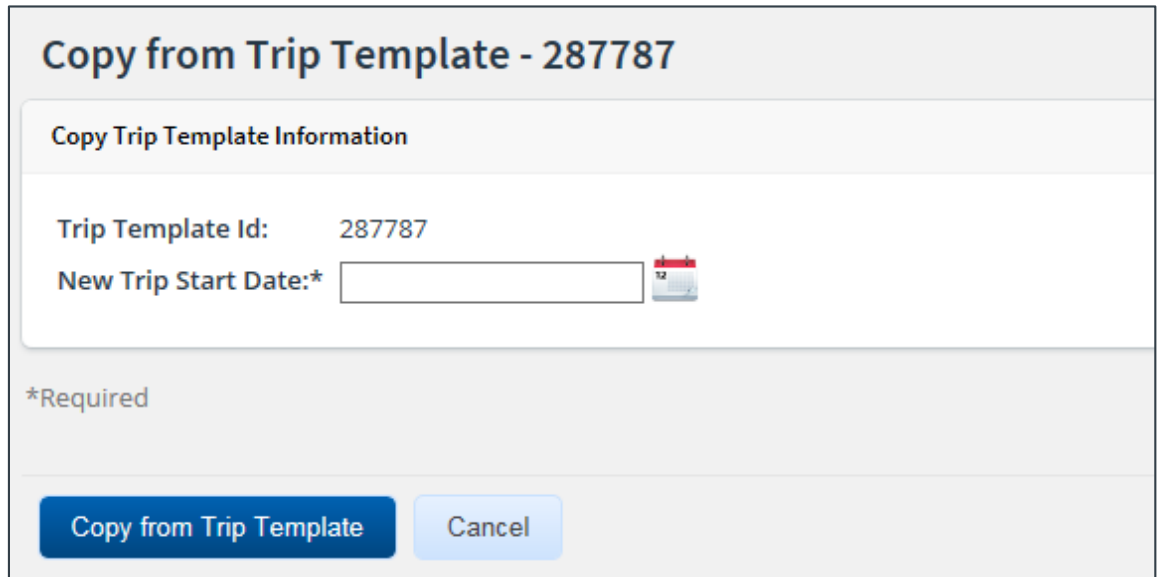


Figure 14: Copy from Trip Template page

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 Making Reservations after Authorization Approval

In most cases, travel policy requires travelers to purchase reservations before submitting their authorization for approval. In some cases, however, travel policy allows travelers to purchase reservations after an authorization is approved.

If your travel policy allows you to purchase reservations after your authorization has been approved, the **Create Reservation** button is enabled in the Reservation section of the Trip Dashboard.

NOTE: This feature does not apply to authorizations created under an open (OA) or group authorization (GA). To add a reservation to an authorization created from an OA or GA, amend the authorization. Refer to UG26 – Amending Authorizations for more information on this process.

Complete the following steps.

1. Access the Trip Dashboard and scroll to the Reservations section.

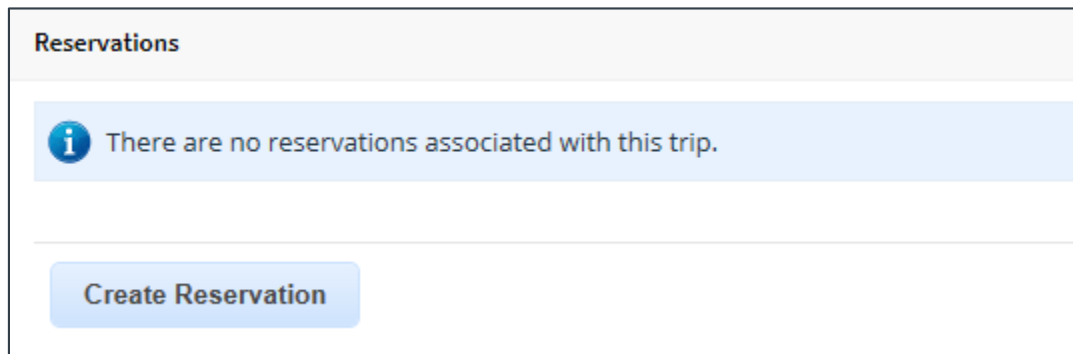


Figure 15: Trip Dashboard — Reservations section

2. Click **Create Reservation**. This displays the Reservation page for the trip.

NOTE: If you estimated your transportation expenses on the authorization, the approved estimated expense amount displays in an informational message.

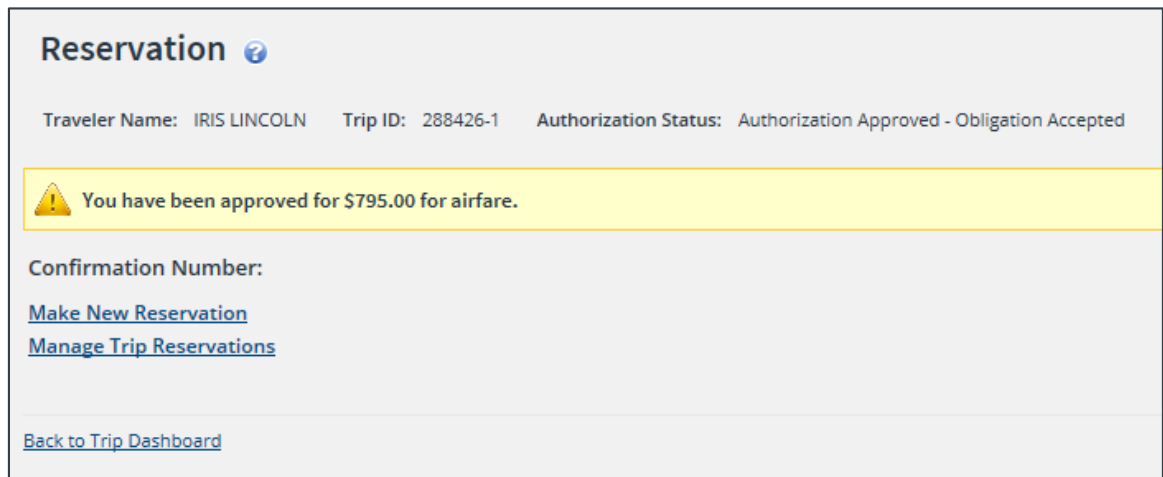


Figure 16: Authorization Reservation — Post approval reservation creation

3. Make your reservations. You will automatically have the opportunity to review your held reservations before being directed to E2's online booking tool.

- To shop online for a reservation using E2's online booking tool, click the **Make New Reservation** link. After purchasing your trip, you are returned to the Reservation page and a success message displays at the top of the page.
- To select a reservation from your list of held reservations, click the [Manage Trip Reservations link](#).
- To request assistance with reservations from your travel management center (TMC), click the **Travel Agent Assistance** link in the Other Actions section.

6.1.1 Manage Trip Reservations

The Manage Trip Reservations window displays when you click the **Manage Trip Reservations** link on the authorization's Reservations page.

Manage Trip Reservations

Confirmation Code: Retrieve

Select	Confirmation Number	Summary	Show	Move to Held Reservations	Cancel Reservation
<input type="checkbox"/>	EOVJZZ	05-Mar-2018 05:25pm Air travel from IAD/Dulles International (IAD) to Luxembourg Findel Airport (LUX) Govt non-contract fare limited availability, Refundable	Show		Cancel
<input type="checkbox"/>	EFZRGM	24-Jun-2018 06:20pm Air travel, Hotel, Car Rental from IAD/Dulles International (IAD) to LHR/Heathrow (LHR) Govt non-contract fare limited availability, Refundable	Show		Cancel

Select and Close
Select
Exit Window

Figure 17: Manage Trip Reservations window

- To retrieve a reservation made by your travel management center, enter the reservation's confirmation code in the **Confirmation Code** field, and then click **Retrieve**. The retrieved reservation is placed in the list of held reservations.
- Click the **Select** check box of each reservation you want to associate with the authorization. You can select multiple reservations.
- Click **Select and Close** to save your selections and close the Manage Trip Reservations window. A success message displays at the top of the Reservations page and the selected reservations are listed.

Reservation ?

Traveler Name: IRIS LINCOLN Trip ID: 288426-1 Authorization Status: Authorization Approved - Obligation Accepted

✔ Your reservation has been successfully sent for ticketing and your approver has been sent a copy of the itinerary.

Confirmation Number: IFDJER

Air ✈

Departure Date	From	To	Fare Type	Cabin Class	Flight #	Vendor	Last Update	Vendor Confirmation	Change Existing Reservation
Thursday, May 24, 2018 08:15am	IAD/Dulles International (IAD)	Lester B Pearson Intl (YYZ)	-CA	ECONOMY	6271	United Airlines	Monday, January 29, 2018	CF5NHC	Change Existing Reservation

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

Car 🚗

Pick-up	Pick-up Location	Drop-off	Drop-off Location	Vendor	Vendor Confirmation	Change Existing Reservation
Thursday, May 24, 2018 10:00am	YYZ Mississauga (YYZ)	Friday, May 25, 2018 09:00am	YYZ Mississauga (YYZ)	Enterprise	1724009026COUNT (ET)	Change Existing Reservation

Ticket Data

i No ticket data available.

[Make New Reservation](#)

[Manage Trip Reservations](#)

[Refresh Reservation Details](#)

Figure 18: Authorization Reservation — With Selected Reservations

7 Revision History

Date	Description	Release
04/2021	<ul style="list-style-type: none"> Added section 1 (Introduction) Added notes to sections 5.1 (Copy an Existing Trip), 5.2 (Copy Another User's Trip), and 5.3.5 (Creating an Authorization from a Trip Template) 	21.1
07/2020	Updated screen shots	20.2
10/2019	Updated title page graphic and copyright information	19.3
03/2019	Copyright and logo updates	19.1
06/2018	<ul style="list-style-type: none"> Minor grammar and spelling changes Updated: <ul style="list-style-type: none"> Figure 4: Copy Trip page Figure 14: Copy from Trip Template page 	18.2
03/2018	Updated images throughout the document	18.1
01/2018	Document formatting and layout changes	17.4
06/2015	Updated section 3, Closing a Trip, to clarify process	15.3
06/2014	Minor edits	14.2
01/2013	Copyright update	ETS2
10/2012	General availability	ETS2

8 Trademark and Copyright

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