Getting Started with Trips

What You Need to Know

A trip consists of two parts. The authorization is a request to travel and includes information about your travel plans, such as:

- Reservations or expected travel itinerary
- Estimated expenses and reimbursement types (e.g., per diem, actual expenses, etc.)
- Accounts to fund travel expenses
- Justification for any out-of-policy travel items

After the authorization is approved and your travel is complete, you must file a voucher to reimburse the travel expenses. A voucher is similar to an expense report and includes:

- Expenses
- Method of reimbursement
- Liquidation of any advances made for the trip

General Steps

1. Create an authorization.
   a. Select *Create Authorization* from the **Start a Travel Document** list on the My E2 **At a Glance** tab.
   b. Click **Go**.

Figure 1: Start a Travel Document — Create an Authorization option

   c. Complete each step in the authorization workflow.

   d. Submit the authorization for approval. You are notified by email as the authorization moves through the approval process, and when it receives final approval.
2. Take the trip.
3. When you return from your trip, create a voucher for expense reimbursement.
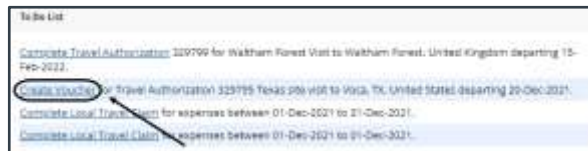   a. Click the **Create Voucher** link for the trip on your To Do List.

Figure 2: To Do List — Create Voucher link

> *TIP: If the link does not appear on your To Do List, locate the trip on your My E2 **Trips** tab, click the **Show** link, and then click **Create Voucher** on the Trip Dashboard.*

   b. To account for all trip expenses now and create a final voucher, select *Final Voucher* from the **For this trip this is the** drop-down list.

> *TIP: If you will account for some trip expenses later, select* Not Final Voucher *from the drop-down list.*

Figure 3: Voucher Basic Information — For This Trip This Is The field

   c. Click **Save and Next Step**, and then complete each step in the voucher workflow.
   d. Submit the voucher for approval. You are notified by email as the voucher moves through the approval process, and when it receives final approval. After a final voucher is approved, the trip is automatically closed.

Additional Information: Authorizations

Refer to the following resources for more information about authorizations.

- View the computer-based tutorial (CBT).
   a. In E2, select *Online Help* from the User Options menu.
   b. Enter *2870* in the **Search** box.
   c. Click **CBT25 – Creating Authorizations** to view the tutorial.
- Access the USCG PPC Travel Branch page for a list of customized user guides. (https://www.dcms.uscg.mil/ppc/Travel/ETS/Guides/)

Additional Information: Vouchers

Refer to the following resources for more information about vouchers.

- View the computer-based tutorial (CBT).
   a. In E2, select *Online Help* from the User Options menu.
   b. Enter *2870* in the **Search** box.
   c. Click **CBT40 – Creating Vouchers** to view the tutorial.
- Access the USCG PPC Travel Branch page for a list of customized user guides. (https://www.dcms.uscg.mil/ppc/Travel/ETS/Guides/)