



## Approving Documents

Approvers review travel documents, ensuring that:

- The document is within travel policy.
- The correct accounts have been selected to fund the travel expenses. You can make funding changes if needed.
- For authorizations, approvers also verify that the expenses are correctly estimated, reimbursement types are correct, estimated expenses have been properly split between funds, and reservations are within policy.
- For group and open authorizations, approvers also verify that the specific limitations are correct.

See the other *Approving...* user guides for more detailed information on approving a specific document.

E2 provides access to approver functions through the **My Approvals** tab on the task bar.

1. Click **My Approvals**. The default Pending Approvals list shows all travel documents that are assigned to you for approval.

ID	Traveler Name	Organization	Start/End Dates	Status	Approval Pending Time	Show
22787	UNCOLN, IRS	Christchurch, New Zealand	01-Jan-2018	Pending Approval (OPEN, INGRD)	0 Days, 21 Hours	Show
04118704	UNCOLN, IRS	CONUS, CONUSUS	01-Jan-2018	Pending Approval (OPEN, INGRD)	0 Days, 0 Hours	Show
258428	UNCOLN, IRS	Zaragoza, Spain	08-Jan-2018	Pending Approval (OPEN, INGRD)	0 Days, 0 Hours	Show

Figure 1: My Approvals – Pending Approvals tab

2. (Optional) To view a list other than the default, click the **Filter Options** tab. This displays the Filter Options section. Select your search criteria, and then click **Apply Filter**.
3. Locate the document in the list.

4. Click the document's **Show** link. This displays the Summary page for that document. This view of the document is very similar to what the traveler sees when creating the document.

Step 4: Voucher Summary

Traveler Name: IRS UNCOLN Trip ID: 289165 Voucher ID: 1 Voucher Type: Final Voucher Status: Pending Voucher Approval

Basic Information - View Details

Expenses - Edit Details

Accounting - Edit Details

Description	Account Code	Obligated Balance	Amount Allocated	Percent Allocated	Balance Available
DOED Account Code	002M2017.A.2017.FN00000.6N2.21019.A.400.000.N.00.	\$2644.79	\$2564.78	99.81%	\$80355.21
		Total	\$2564.78	99.81%	
		Remaining amount to be allocated	\$5.00		
		Total claim amount	\$2569.78		

Travel Policy Justifications

Travel Policy Warnings

City Pair Information

Audit Warnings

Remarks - Edit Details

Receipts and Attachments - Edit Details

Approve Return Unlock Back to Step 3, Accounting

Figure 2: Voucher Summary page for an approver

5. Ensure the document is locked to you.
  - The document is locked if the **Unlock** link is listed in the Other Actions section.
  - If the **Lock** link is listed in the Other Actions section, the document is not currently locked to any approver. Click **Lock** to continue.
6. Use the Summary page to review each section of the document.
  - If you need to see additional information or make changes to a section, click the **View Details** or **Edit Details** link for that section.
  - Click the **Printable Profile** link in the Extras section to view or print selected information from the traveler's profile.
7. Approve, return, or unlock the document.
  - **Approve** – Click **Approve**, and then click **Confirm**. In the case of warnings or errors that result in approval failure, contact your

agency's financial system help desk for assistance.

- **Return for revision**
  - a. Click **Return**, which displays the Confirm Action window.
  - b. **Return To** – If available, select the person or group (i.e., traveler/owner or prior approver) to whom you are returning the document.
  - c. **Reason** – Select the reason you are returning the document.
  - d. **Remarks** – Enter any necessary remarks.
  - e. Click **Confirm**.
- **Unlock** – Click **Unlock** to make the document available to another approver.

## Viewing Other Trip-Related Documents

Dashboards are available for:

- Group authorizations
- Open authorizations
- Trips

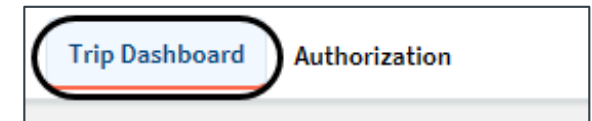


Figure 3: Trip Dashboard and Authorization tabs

A dashboard displays a summary of all related documents, including their status. For example, the Trip Dashboard provides information about authorizations, comparative trips, vouchers, advances, and reservations for a specific trip.

To view a document, click the document's **Show** link on the dashboard.

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