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.

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.

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
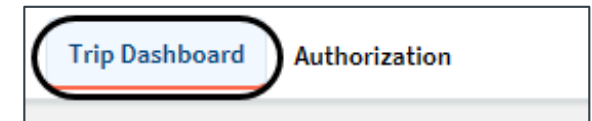- Open authorizations
- Trips

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.