

NOAA E2 Travel Basic Exercises for FY 2019 Training Version 1.0.1

Changes/Revisions Record

This is a living document that is changed as required to reflect system, operational, or organizational changes. Modifications made to this document are recorded in the Changes/Revisions Record below. This record shall be maintained throughout the life of the document.

Version Number	Date	Description of Change/Revision	Changes Made by Name/Title/ Organization
1.0.1	7/8/2019	Updated fees and fix a few errors	ECobbs/FSD CSB Training
1.0	12/13/2018	Updated fee information for FY 2019	ECobbs/FSD CSB Training

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Table of Contents

Exercise #2:Basic Travel Authorization9Exercise #3:Approve an Authorization31Exercise #4:Basic Travel Voucher31Exercise #4:Basic Travel Voucher31Exercise #5:Log into the System and Send TV to Approver61Exercise #6:Approve a Voucher – Disapprove Cost65Exercise #7:Supplemental Travel Voucher73Exercise #8:Reclaim Travel Voucher73Exercise #8:Reclaim Travel Voucher81Exercise #9:Local Travel Voucher91
Exercise #4:Basic Travel Voucher
Exercise #5:Log into the System and Send TV to Approver
Exercise #6: Approve a Voucher – Disapprove Cost Exercise #7: Supplemental Travel Voucher
Exercise #7: Supplemental Travel Voucher
Exercise #8: Reclaim Travel Voucher81
Exercise #0: Local Travel Voucher 01
Exercise #10: Copy Travel Authorization95
Exercise #11: Recall/Adjust Travel Authorization Allocate ACCS103
Exercise #12: Create TA Where Duty Station Not in Per Diem Table115
Exercise #13: Create TA Incorporating Leave at the End of the Trip
Exercise #14: Create TA Incorporating Multiple Locations

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Exercise #1: Log into the System and Travel for Others

Objectives:

- Log in as an preparer
- Log into a traveler to prepare trips

Instructions: Execute the following steps:

Step	Action					
1	From the <i>E2 Login</i> screen:					
	E2 User Id Password Torget Researce Login					
	Login Help Warning About E2 Solutions This is a U.S. Federal Government information system that is "FOR OFFICIAL USE ONLY." Unauthorized access is a violation of U.S. Law and may result in criminal or administrative penalties. GSA eTravel Program Privacy Act Notice This system contains information protected under the provisions of the Privacy Act of 1974 (Public Law 93-579).					
	Copyright 2003-2018 CW Government Travel					
	 Enter E2 User ID Enter Password Click Login 					

ер	Action							
2	A Warning Banner appears:							
	WARNING MESSAGE AND PRIVACY ACT NOTICE							
	WARNING MESSAGE							
	This is a U.S. Federal Government information system that is "FOR OFFICIAL USE ONLY." Unauthorized access is a violation of U.S. Law and may result in criminal or administrative pe Users shall not access other user' or system files without proper authority. Absence of access controls IS NOT authorization for access! Information systems and equipment related to the Travel Service are intended for communication. transmission, processing, and storage of U.S. Government information. These systems and equipment are subject to monitoring by law enforcement and authorized officials. Monitoring may result in the acquisition, recording, an analysis of all data being communicated. transmitted, processed, or stored in this system by enforcement and authorized officials. Use of this system constitutes consent to such monitor	s E-Gov d law						
	PRIVACY ACT NOTICE							
	CW Government Travel, inc. wants to make your experience online satisfying and safe. We we provide you with the means to control your privacy and give you a way to voice questions or concerns you may have. This company will hold ownership of any information you provide us will not sell ownership of this data to any other company or organization. We will not transfe information to competitors. If you are providing personal information within a registration pe will only be used within our domain unless you choose to allow third party data sharing.	s. We						
	Your Acceptance of these Terms							
	By using this site, you agree to our Privacy Policy. We may change the Policy from time to time	e, so 👻						
	Accept							
3	 Click Accept 							
3	 Click Accept The My E2 screen appears: 							
5	 Click Accept The My E2 screen appears: 	ERIN SELBY •						
3	Click Accept The My E2 screen appears: MrE2 MY APPROVALS TRAVEL FOR OTHERS REPORTS At a Clance Trips Local Travel Open Authorization Group Authorization	ERIN SELBY V						
}	Click Accept The My E2 screen appears: MYE2 MY APPROVALS TRAVEL FOR OTHERS REPORTS At a Clance Trips Local Travel Open Authorization Group Authorization You have 5,081 day(s) to change your password. Access your E2 Profile and choose a new password.							
3	Click Accept The My E2 screen appears: MrE2 MY APPROVALS TRAVEL FOR OTHERS REPORTS At a Clance Trips Local Travel Open Authorization Group Authorization	Bulletins						
3	Click Accept The My E2 screen appears: MYE2 MY APPROVALS TRAVEL FOR OTHERS REPORTS At a Clance Trips Local Travel Open Authorization Group Authorization You have 5,081 day(s) to change your password. Access your E2 Profile and choose a new password.							
3	Click Accept The My E2 screen appears: MY E2 MY APPROVALS TRAVEL FOR OTHERS REPORTS My E3 Start a Travel Document	Bulletins 30-May-2018; Remember to always book a FedRooms hotel with your trip 10-Dec-2015: Once you access your E2 account for the first time, click						
3	Click Accept The My E2 screen appears: MYE2 MY APPROVALS TRAVEL FOR OTHERS REPORTS As Glance Trips Local Travel Open Authorization Group Authorization for hourse 9,081 day(s) to change your password. Access your E2 Profile and choose a new password. Start a Travel Document What would you like to do today? Create an Authorization © Co	Bulletins 30-May-2018; Remember to always book a FedRooms hotel with your trip 10-Dec-2015: Once you access your E2 account for the first time, click profile to view andcead_more						
3	Click Accept Click Accept Delian Vour have 9,001 day(s) to change your password. Access your E2 Profile and chose a new password. Vour have 9,001 day(s) to change your password. Access your E2 Profile and chose a new password. Vour cannot make reservations contine until you have a TMC Profile ID. Go to Profile and drick Edit Travel vour cannot make reservations contine until you have a TMC Profile ID. Go to Profile and drick Edit Travel	Bulletins 30-May-2018; Remember to always book a FedRooms hotel with your trip 10-Dec-2015: Once you access your E2 account for the first time, click Profile to view andcead_more Pending Approvals						
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tep					Action					
4	The Travel For Others screen appears:									
	0									
	Solutions	My E2 My Approvals Tra	wel For Others Reports			Message Center 🚣 🛛 Pro				
		Travel for Others	5			Find Answers + Logout + Welcome ERIN SEL				
						Filter Options. (Filtering is on)				
		Agency:	Dept of Commerce							
		Organization:	National Oceanic and Atmospheric	Administration disabl	led ¥					
		Major Customer:	NOAA NWS 20-01 Nat Weather Se	rvice disabled	Ŧ					
		Minor Customer:	Please select a Minor customer							
		- 0.4.0 - 1017 ACC 040430170		- OR -						
			Only show travelers for wh	om you are a design	ated travel arranger					
		Minor Customer:	Please select a Minor customer		٠					
		Traveler Information								
		Last Name:		First Name:						
		Email:		E2 User Id:						
				A	oply Filter					
		Order by Name • So	ort Ascending Sort Descending	þ						
		Name Arrang Travel	e Email Address	E2 User Id	Major Customer	Customer				
		ABERDEEN, CYNTHIA Arrange	e e2null@cwtsatotravel.com	DOCAUDST06	NOAA NWS 20-01 Nat W Service	leather NOAA NWS 20-01-0003-02-00 Communications Div				
	∠ ≻ Sea	ADAMS, RAYMOND Arrange			(i.e. E2 User					
		arch for the t	training Trav		Service	Decision Tr				
5			training Trav		Service	Decision Tr				
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5	The se	arch for the t earch results wy E2 My Approvals Trav Travel for Others Major Customer: Minor Customer: Minor Customer: Traveler Information Last Name: Email:	training Trav appear: appear: appear: book of Commerce Fational Oceanic and Atmospheric Fational Oc	Administration disable - OR - om you are a design Pirst Name: E2 User Id: Administration disable	(i.e. E2 User	Customer				

Action								
The Traveler's <i>My E2</i> screen appears:								
Solutions: TRAVELER'S TRIPS TRAVELER'S PROFILE	JENNIFER SELKMAN // ERIN SELBY •							
Start a Travel Document What would you like to do today? Make Reservations Co	Bulletins 30-May-2018; Remember to always book a FedRooms hotel with your trip 10-Dec-2015: Once you access your E2 account for the first time, click Profile to view andread more							
To Do List Get started by selecting a QUICK LINKS to shop for a reservation, create a new travel authorization, or other travel documents.	Pending Approvals No pending approvals found.							
	Additional Notices							
	The Traveler's My E2 screen appears:							

Objectives:

Exercise #2: Basic Travel Authorization

- Create a Basic Travel Authorization (TA)
 - Navigate each step of the TA

Instructions: Execute the following steps:

You have been instructed to attend a training class in Chicago, IL. The class dates are the October 23-24, 2018. You will have travel days on either side of the training. Your POV costs will include a person taking you to the airport and picking you up. Your authorization will need to include the following costs:

Estimated Expenses

\$287.00 = Round-trip air fare
\$37.63 = TMC Transaction Fee
50 miles one way to airport using private vehicle (POV)
\$350 for Rental Car
\$65 for Rental Car Gas
\$10/night for Parking at the hotel
\$25/night for Hotel Tax
\$50 for Internet Fees
\$50 Checked Baggage Fees

Step	Action						
1	 From the <i>My E2</i> screen: Click the drop-down arrow on the "<i>What would you like to do today</i>?" field Select <i>Create an Authorization</i> Click <i>Go</i> 						
	Solutions* MY E2 MY APPROVALS TRAVEL FOR OTHERS REPORTS At a Glance Trips Local Travel Open Authorization Group Authorization Image: Start a Travel Document Start a Travel Document Start a Travel Document						
	What would you like to do today? Make Reservations Make Reservations Show Held Reservations Create an Authorization						
	To Do List Create Local Travel Claim Get started by selecting a QUICK LINKS to shop for a reservation, create a new travel authorization, or other travel documents.						

Step	Action
	 Notes: ✓ In production, if you did not have a reservation set up, you would click Make Reservation ✓ In production, if you called the TMC, you would create your authorization and then associate the reservation to the authorization. ✓ In production, if you had made your own reservation, but didn't create an authorization at the time of the reservation, you can still add it by going to held reservations and then create the authorization. ✓ For Training Purposes we will not be working with the Online Reservation System or reservations
2	<image/> <complex-block><complex-block></complex-block></complex-block>
	 Notes: ✓ The E2 Solutions travel system generates a Document Number for the Authorization. ✓ The E2 Solutions travel system generates a Trip Number that groups all travel documents together. ✓ The Trip Number is the number that keeps the authorization and vouchers together and is what is used to query for information.

Step	Action							
3	The Step 2: Reservation screen of the authorization appears:							
	Basic Information Step 2 : Reservation @ Reservation Itraveler Name: ERIN K COBBS Site Details Traveler Name: ERIN K COBBS							
	Expenses Salic Information has been successfully updated. Travel Policy Confirmation Number:							
	ber Actions							
	marks Nood Step Back to Step 1: Back to Step 1							
	Click Next Step							
	otes:							
	 ✓ For training purposes we will be skipping this step. ✓ In Production, this is the step you would be using if you had made a reservation outside of the system and needed to associate it to the authorization by using Manage Trip Reservations. 							
	If you had a reservation already associated, this is the screen you'd go to in order to view/change your reservation.							

Step	Action
4	The Step 3: Site Details screen of the authorization appears:
	 Select the Departing Date (i.e. day before the training class starts) Select the Departing Time (i.e. defaults to morning) Change the Departing From if needed (i.e. defaults to your profile location) Enter the Going To (i.e. Chicago) Select the Returning Date (i.e. day after the training class ending) Select the Returning Date (i.e. day after the training class ending) Select the Returning Date (i.e. day after the training class ending) Select the Returning Date (i.e. day after the training class ending) Select the Returning Date (i.e. day after the training class ending) Select the Returning Date (i.e. day after the training class ending) Select the Returning Date (i.e. day after the training class ending) Select the Arrival Time Click Save and Next Step
	 Notes: ✓ For training purposes we will be entering information into this section. ✓ If there is a reservation associated to the authorization this information will automatically fill out based off the reservation, but it should still be looked at to make sure all information is correct for per diem purposes. ✓ If changes occur to reservations, this screen is not automatically updated.

tep	Action										
5	The Step 4: Expenses screen of the authorization appears:										
	1 Basic Information 2 Reservation 3 Site Details 6 Expenses 5 Accounting 6 Travel Policy 7 Summary										
	Other Actions Remarks Araschmens Prinsable Authoritation Compact Prinsable Authoritation Daily Expenses Summary Trip History Add Non-Federal Sponsor View Routing History Travel Agent Assistance	Agency Billed: 15.10 Traveler: 937.00 Unassigned: 0.00 Amount: 952.10 ✓ Riter Options Order by: Order by: Date ✓ Sort Ascending Dase: Type 23-00:2017 Mesis and Incidentsis 23-00:2017 Mesis and Incidentsis 10	Sort Descending Answer: Bescription 678:00 Lodging expense in Chicago, IL, United States including lodging taxes 229:00 MAE expense in Chicago, IL, United States	Pay To J Travelar Travelar	Nerts Musify Copy Delete Maddy Maddy						
	Extras Trips List Create Trip Template Delete Authoritation Princable Profile	26-Oc:2017 Voucher Transaction Fee	Showing 1 - 3 of 3 Remark: Reduced								
	To add hotel tax, on the lodging line, click on <i>Modify</i>										
	 Notes: ✓ The system will automatically populate your Lodging and Meals and Incidentals based of the locations in your site details. ✓ If you had a reservation tied to the authorization the system will automatically populate 										
	the ✓ Th	e transportation cosi e system will autom	ts (i.e. airfare, TMC fee and rel patically put an expense cost fo tually charged until you file the	ntal car) or a Voucher Ti							

Step	Action												
6	The Lodging Expenses pop-up window appears:												
	Lodging Expens	es											Ø
	✓ Filter Op	tions 🗸 🗸	op <mark>l</mark> y to All Di	isplayed Expenses									
	Lodging Site:	Chicago, IL, Uni	ted States										
	Order by:			Sort Ascending	Sort Descending								
	Date	Reimburseme	▼ Type	Per Diem Rate		Allowed	Estimated Tax	Pay To	Day Off	Shared	Notes	Alerts	
	23-Oct-2017	Per Diem	•	226.00	226.00	226.00	0.00	Traveler •			Hotes	Merts	
	24-Oct-2017	Per Diem	*	226.00	226.00	226.00	0.00	Traveler •	0				
	25-Oct-2017	Per Diem	¥	226.00	226.00	226.00	0.00	Traveler v					
	26-Oct-2017	Per Diem		226.00	0.00	0.00	0.00			No			
				Running Totals:	678.00	678.00	0.00						
	Save and Close Save Exit Window												
	2												
	• Ap • Lo	ter Opt ply to <i>I</i> dging S der by	ions All Dis Site	ns to this splayed E cending									

Step	Action					
6b	 The Apply to All Displayed Expenses allows a user to: Change the reimbursement type (i.e. Actuals, reduced, etc.) Change the lodging amount Enter an allowed lodging amount Enter estimated lodging tax amount Change the Pay To Add an Official Day Off Add that your lodging is being shared If information is only entered in here, without doing any filtering first, it would apply to all displayed lodging.					
	► Filter Options	 Apply to All Displayed Experience Reimbursement Type: Lodging Amount: Allowed: Estimated Lodging Tax: Pay To: Official Day Off: Shared: 	No Change No Change No Change No Change No Change No Change No Change No Change No Change No Change No Change			

Step	Action						
6c	 The Lodging Site section will show the lodging information for the location selected. If there's more than one, a drop down arrow will show to allow a selection between locations. The following can be done on this screen: Change the Reimbursement Type (i.e. Actuals, reduced, etc.) Change the lodging amount Enter estimated lodging tax amount Change the Pay To Add an Official Day Off Add that your lodging is being shared 						
	It's similar to the Apply to All Displayed however, on this screen each action has to be done on the individual expense. Lodging Expense Filter Options Apply to All Displayed Expenses Iodging Site: Chicago, IL, United States Order by: Date Sort Ascending Sort Descending Date Reimbursement Type Per Diem Rate Amount Allowed Estimated Tax Pay To Day Off Shared Notes Allers Diagong Traveler Diagong Per Diem 223.00 223.00 0.00 Traveler Traveler						
7	Interview						
	25-Oct-2018 Per Diem 223.00 0.00 0.00 0.00 No Running Totals: 669.00 669.00 75.00						

Step		Action						
8	The Step 4: Expenses screen of lodging costs:	the authorization	appears	with th	e upo	dated		
	Step 4 : Expenses 😈							
	Traveler Name: SELENA JENKINS Trip ID: 313198 Authorization Status: New Authorization	Traveler Name: SELENA JENRINS Trip ID: 313198 Authorization Status: New Authorization						
	Stodging expenses have been updated successfully.							
	Expense Information							
	Agency Billed: 15.10 Traveler: 1010.00 Unasigned: 0.00 Amount: 1025.10 <i>Alter Options</i>							
	Order by: Date Sort Ascending Sort Descending							
	Date Type Amount Description	Pay To	Alerts	Modify	Copy	Delete		
	22-Oct-2018 Lodging 744.00 Lodging expense in Chicago, IL, United States	s including lodging taxes Traveler		Modify				
	22-Oct-2018 Meals and Incidentals 266.00 M&IE expense in Chicago, IL, United States	Traveler		Modify				
	25-Oct-2018 Voucher Transaction Fee 15.10 Voucher Transaction Fee	Agency Billed						
						ng 1 - 3 of 3		
	Add New Expense				Remark	Reduced:		
	Click the Add New Expense line	nk						

Step	Action
8a	The Add New Expense pop-up window appears:
	Add New Expense Date of Expense:* 22-Oct-2018 Expense:* Select Expense Type Amount:* 0.00 Description: Remark: Add an Optional Remark Site of Expense: Allow selection of site based on date
	 *Required Save and New Save and Close Exit Window Enter the Date of Expense (i.e. defaults to the beginning date of the trip) Select the Expense Enter the Amount
	 Enter a Description (if needed) Click Save and New (if adding more expenses) or Save and Close (if finished entering expenses)
	Do each step above for the following:
	Estimated Expenses \$287.00 = Round-trip air fare (Airfare – Common Carrier) \$37.63 = Transaction Fee (TMC Fee (Online With Air or Rail) 50 miles one way to airport using private vehicle (POV) (x4) \$350 for Rental Car \$65 for Rental Car Gas (Fuel – Gasoline) \$10/night for Parking at the hotel \$50 for Internet Fees (Business Center Services) \$50 Checked Baggage Fees

tep	Action								
	* *	There is a remarks h Allow the s Based upo as well. Internet ar If you have trip, like ch Once som	n area to put a remark to the e ere. There is another area in system to choose the site of e on the expense chosen, additi nd such fees should be listed u e expenses that are at the sta necked baggage, you can cop e expenses have been entere ee 10, 25, 50 or All expenses	which to put xpense base onal fields m under Busine tof the trip t y that expense d, you have	remarks. ed on date. ay show up ess Center hat also ne se to all dat at the botto	o that nee Services red to be tes or a s	ed to k at the pecifi	e filled of t end of t c one.	
8b	Expense Inform Agency Billed Traveler: Unassigned: Arnount Filter Op Order by: Da	: 339,73 1664.00 0.00 2003.73							
	And the second sec	Type	Amount Description	Pay To Agency Billed	Alerts	Modify	Сору	Delete	
	22-Oct-2018 22-Oct-2018 22-Oct-2018 22-Oct-2018 22-Oct-2018 22-Oct-2018 22-Oct-2018 22-Oct-2018 22-Oct-2018	Lodging Meals and Incidentals Perking Privately Owned Vehicle: Private Auto Authorized	287.00 50.00 Internet 50.00 744.00 Lodging expense in Chicago, IL, United States individing lodging taxe 266.00 MAIE expense in Chicago, IL, United States 30.00 109.00 From home to airport - 200 miles © \$0.545 per mile. 350.00 17.63	Traveler Traveler Traveler		Madify Medify Medify Medify Medify Medify Medify Medify Medify	Сору Сору Сору Сору Сору Сору Сору Сору	Deleze Deleze Deleze Deleze Deleze Deleze Deleze	

Step	Action						
9	The Step 5: Accounting screen of the authorization appears:						
	Step 5 : Accounting 😡						
	Traveler Name: SELENA JENKINS Trip ID: 313198 Authorization Status: New Authorization						
	No account codes selected. Click the 'Select Account Codes' link below to add an account code.						
	Accounting						
	i No account codes selected.						
	Select Account Codes						
	Save and Next Step Save Back to Step 4: Expenses						
	Click the Select Account Codes link						

Step	Action				
9a	The Account Code Selection pop-up window appears:				
		C			
	Account Code Selection				
	Select Account Codes Add Account Codes				
	Select Source Description Account Code	Delete			
	Minor Customer FY 19 - ACCS1 51 0440000-000 2019-98-01-00-000 11-01-0006-02-00-00-00	Delete			
	Minor Customer FY 19 - ACC52 51 0443000-000 2019-98-01-00-000 99-04-0000-00-00-00-00	Delete			
	Select and Close Select Exit Window				
	There are two tabs to this screen. The first tab is <i>Select Account Codes</i> . What displays here are account codes that have been saved as favorites to your profile or at the minor level.				
	The second tab is <i>Add Account Codes</i> . This is where yo a particular account code.	ou would go	to search on		
	Click Add Account Codes tab				

Step		Action					
9b	The Add New Expense pop-up wi	ndow Add Account Codes tab appears:					
	Account Code Selection						
	Select Account Codes Add Account Codes						
	Add Account Code	A					
	Add an account code by entering the segment data in th segment data from an existing account code, click on the						
	Bureau: 51						
	Project/Task:	Search					
	FCFY/Fund/Program:	Search					
	Org Code:	Search					
	ount Code						
Add and Close Add Exit Window							
	The <i>Add Account Code</i> section is where a search would be done for accounting codes. The Bureau field should automatically populate based on the bureau of the traveler.						
9b1	In the Project/Task field:						
	 Enter a <i>Project Code (if known)</i> Click <i>Search</i> 						
	Bureau: 14						
	Project/Task: 28LE	Search					
	Notes:						
	 ✓ If searching by project and task codes, make sure to put a hyphen (-) between the two codes with no spaces (e.g. 28LEF18-B00) ✓ ACCS must be selected using the search feature, typing the values in the field alone will not add the accounting. 						

Step	Action						
9b2	A listing of all active and current ACCS codes will show up.						
	Dimensional Accounting Code Search						
	Code Values Description						
	0440000-000 GRANTS OPERATIONS-CHANGE						
	0443000-000 CBS-NO TASK						
	DSFSDFD-000 OGC ADMIN-NO TASK						
	Showing 1 - 3 of 3						
	Select the code by clicking on it						
9b3	The Project/Task field should now have the selection filled in:						
	Project/Task: 0443000-000 Search						
	FCFY/Fund/Program: Search						
	For the FCFY/Fund/Program field						
	Click Search						
9b4	Another pop-up window will appear showing the Fund Code Fiscal Year, Fund Code and program associated to the project that you selected: Dimensional Accounting Code Search						
	Code Values Description						
	2016-98-01-00-000						
	<u>2017-98-01-00-000</u>						
	2019-98-01-00-000						
	2020-98-01-00-000						
	Showing 1 - 4 of 4						
	Select the code by clicking on it (e.g. current FCFY)						

Step		Action					
9b5	The FCFY/Fund Program field should now have the selection filled in:						
	Project/Task:	0443000-000 Search					
	FCFY/Fund/Program:	2019-98-01-00-000 Search					
	Org Code:	Search					
	 For the Org Code field: Enter the Org Code (if known) Click Search 						
9b6	Another pop-up window will appear showing the Org codes associated to what you searched on:						
	Dimensional Accounting C	ode Search					
	Code Values	Description					
	01-00-0000-00-00-00-00	IMMEDIATE OFFICE OF THE SECRETARY					
	01-00-0001-00-00-00-00	AGIE'S TEST					
	01-01-0000-00-00-00-00	CHIEF OF STAFF FOR ASST SECRETARY					
	01-03-0000-00-00-00-00	OFFICE OF COUNSELLOR / CHIEF OF STAFF					
	<u>01-03-0001-00-00-00-00</u>	OFFICE OF WHITE HOUSE LIASON					
	01-03-0002-00-00-00-00						
	01-03-0003-00-00-00-00	OFFICE OF BUSINESS LIASON					
	01-03-0004-00-00-00	OFFICE OF POLICY, PLANNING, & COORDINA					
	01-03-0005-00-00-00-00 01-03-0005-02-00-00-00	OFFICE OF PUBLIC AFFAIRS OFFICE OF PUBLIC AFFAIRS					
	01-03-0005-02-00-00	OFFICE OF PUBLIC AFFAIRS					
		Showing 1 - 10 of 151 1 2 3 4 5					
	Exit Window						
	Select the code by clicking on it						

Step			Action				
9b7	The Org Code f	ield should	l now be filled in:				
	Account Code Selection						
	Select Account Codes	Add Account Codes					
	Add Account Code				-		
	Add an account code by entering the segment data in the corresponding fields below and clicking Add. To pre-fill segment data from an existing account code, click on the account code link in the Templates section below.						
	Bureau:		51		_		
	Project/Task:		0443000-000 Search				
	FCFY/Fund/Program:		2019-98-01-00-000 Search 01-03-0005-02-02-00-00 Search				
	Org Code:						
	Trip Accounting Code	Templates					
	Description		Account Code				
Add and Close Add Exit Window							
	Now that all three	ee fields ha	ave values:				
	> Click Add a	nd Close					
9c	-	-	screen of the authorizat		ars with	the	
	Step 5 : Accounting 😡						
	Traveler Name: SELENA JENKINS Trip ID:	313198 Authorization Status: 1	Vew Authorization				
	1 account code(s) added to page.						
	Accounting Description Account Code		Obligated Balance	Amount Allocated	Percent Allocated	Add to Favorites	Delete
	51 0443000-000 2019-98-0	1+00-00-000 01-03-0005-02	\$0.00 Total:	\$ 2003.73 \$2003.73	100.00%	Add	Delete
			Remaining amount to be allocated: Total claim amount:	\$0.00 \$2003.73			
	Select Account Codes						
	Save and Next Slep Save	Back to Step 4: Expenses					
	Click Save a	and Next S	Step				

Step		Action		
	Notes: ✓ If the accounting is somethin traveler's favorites. ✓ Training ACCS codes will no		ently, click ADD to a	dd it to the
10	The Step 6: Travel Policy scr Step 6: Travel Policy •		on appears:	
	Traveler Name: SELENA JENKINS: Trip ID: 313198 Authoritation Status: New Authors Traveler Name: SELENA JENKINS: Trip ID: 313198 These policy Items are incomplete: Air Cabin Class, and Rental Car Type. Control Carter Control Carter Control Carter Control Carter Control Carter Control Carter Carter Control Carter C	ation -		
	Travel Policy Justifications			collapse or expand all sections
	Policy Item	Information	xplanation	-
	Air Cabin Class Rental Car Type	Select one		
	*Required Travel Policy Warnings			^
	Lowest Logical Airfare No	formation o commercial air reservation. o commercial rental car reservation.		
	City Pair Information			^
	All fares listed are one way fares per GSA City Pair Program. City Pair Washington Dulles International (IAD) > Chicago Midway Airport (MDW) Washington Dulles International (IAD) > Chicago OHare International Airport (ORD)		YCA F. 287.0 481.00	150.00
	 At the top of the screen you mi Red is an error, it must be f Yellow is a warning, it's just Green is everything is ok 	ixed before moving c		missing

Step		Ac	tion		
10a	In the Travel Policy Justification section, you would need to select the drop-down arrow on the information field for both air and rental car.				
	Travel Policy Justifications				
	Policy Item		Information E	xplanation	
	Air Cabin Class		Coach 🔻	Within policy	
	Rental Car Type		Economy	Within policy	
	If something out of policy out by selecting one of th		•	ll need t	o be filled
	Policy Item	Information	Explanation		
	Air Cabin Class	Business class	Select one Select one		•
	Rental Car Type	Economy	Accommodate Special Need Except Security Circumstances Inadequate Health Standard Or Sanitation		
	*Required		Only Business Fare For City Pair Costs Paid From Non Gvt Source		
	Travel Policy Warnings		Org/Dest Is Oconus & 14H Overall Cost Savings No Timely Space In Coach		
	Policy Item	Information	Required For Agency Mission		
10b	Notes: ✓ If selections were made ✓ Values in this area dea When finished making su	fault from the rese	ervation information.	t have to	be filled out.
100	*Required	re everything is	s med out property.		
	Travel Policy Warnings				^
	Policy Item	Information			
	Lowest Logical Airfare Lowest Compact Car	No commercial air reserva No commercial rental car r			
	City Pair Information				^
	All fares listed are one way fares per GSA City Pair Pro	7/3m			
	City Pair			YCA Fare	-CA Fare
	Washington Ronald Reagan National Airport (DCA) > Chicago	OHare International Airport (ORD)		111.00	0.00
	Save and Next Step Save Back to Step	x Accounting			
	Click Save and Next	Step			

Step		Action		
11	The Step 7: Summary screen of the authorization appears:			
	> Add A	Step 7: Summary • Treater Name: StUDAL(SUMM: Training Chicago Specific Travel Function: Contraction Type of Travel: Travel Training Chicago Specific Travel Function: Contraction Optimizer Travel Studaets Specific Travel Function: Contraction Specific Travel Function Specin Travel Fu		
		d the itinerary to authorization as an attachment ke sure to add any pertinent remarks concerning the authorization		
12	The Conf	irm Action pop-up will appear.		
		want to proceed?		

Step	Action		
13	The My E2 screen should appear w authorization has been sent to the a		
	Solubons TRAVELER'S TRIPS TRAVELER'S PROFILE At a Glance Trips Local Travel Open Authorization Group Authorization	SELENAJENKINS // HEATHER RIGGS •	
	Authorization 313298 has been successfully sent to approves.		
	Start a Travel Document	Bulletins	
	What would you like to do today? Make Reservations	▲ 20 Han-2019: Once you access your E2 account for the first time, click Profile to view and-cost more ▲ 20 Han-2019: Remember to always book a FedRooms hotel with your trip	
	To Do List	Pending Approvals.	
	No to do list items found.	Trip 313198 for 52003.73 (etc. cost) for Travel Training Chicago to Chicago. IL, United States departing 22-Oct-2018 is pending approval from DOCAPRST25	
		Additional Notices	
		No additional notices found.	

Exercise #3: Approve an Authorization

Objectives: • Approve a Travel Authorization for training purposes

Instructions: Execute the following steps:

Step	Action			
1	From the Traveler's <i>My E2</i> screen:			
	Solutions TRAVELER'S TRAVELER'S PROFILE	JENNIFER SELKMAN // ERIN SELBY		
	At a Glance Trips Local Travel Open Authorization Group Authorization			
	Start a Travel Document	Bulletins		
	What would you like to do today? Make Reservations Go	30-May-2018: Remember to always book a FedRooms hotel with your trip 10-Dec-2015: Once you access your E2 account for the first time, click Profile to view and <u>read more</u>		
	To Do List	Pending Approvals		
	Get started by selecting a QUICK LINKS to shop for a reservation, create a new travel authorization, or other travel documents.	No pending approvals found.		
		Additional Notices		
		1 No additional notices found.		
2	 Click the Names in the top right corner A drop down listing appears: 			
	JENNIFER SELKMAN // ERIN SELBY			
	Stop arranging for JENNIFER SELKMAN			
	Message Center			
	Online Help			
	Logout			
	 Click Stop arranged for: 			

Step	Action	
3	The Travel for Others screen appears:	
	Solutions: My E2 My Approvals Travel For Others Reports	Message Center 👗 🛛 Profile
	Travel for Others	ind Answers + Logout + Welcome ERIN SELBY
		Eliter Options. (Filtering is on)
	Agency: Dept of Commerce * Organization: Hattonal Oceanic and Atmospheric Administration disabled * Major Customer: INGAA INVS 20-01 Nat Weather Service disabled *	
	Minor Customer: Please select a Minor customer • OR •	
	Only show travelers for whom you are a designated travel arranger Minor Customer: Please select a Minor customer *	
	Traveler Information Last Name: First Name:	
	Email: E2 User Id: doctrost01	
	Order by Name Sort Ascending Sort Descending Name Arrange Travel Email Address E2 User Id Major Customer Customer	
	SELXMAN, JEINNIFER Arrange e2null@cwtsatotravel.com DOCTRVST01 NOAA NWS 20-01 Nat Weather Service NOAA NWS 20-01-0003-	02-00 Communications Div Showing 1 × 1 of 1 Copyright 2003-2013 CW Government Travel
	Click the My Approvals	
4	The Pending Approvals screen appears:	
	Pending Approvals	
	 ✓ Filter Options 	
	Order by: Approval Pending Time Sort Ascending Sort Descending	
	ID Traveler Name Destination Start/Departure Date Status 313198 JENKINS, SELENA Chicago, IL, United States 22-Oct-2018 Pending Approval(DOCAPRST25)	Approval Pending Time Show 0 Days, 0 Hours Show
	Click Show for the document you want to approve	Showing 1 - 1 of 1
	Notes:	
	✓ All documents awaiting your approval will appear with	the latest one at the
	top ✓ You can use the filter options to rearrange how the do	ocuments show

)		Action	
Т	he Step 7 :	: Summary screen appears:	
	Trip Dashboard Authoriza		
	1 Basic Information		
	2 Reservation	Step 7 : Summary 🥑	
	3 Site Details	Traveler Name: SELENA JENKINS Trip ID: 313198 Authorization Status: Pending Authorization Approval	
	4 Expenses 5 Accounting	Basic Information - View Details	collapse or expand all sections
	6 Travel Policy	basic information - <u>view Details</u>	~
	Summary	Type of Travel: Training Specific Travel Purpose: Travel Training Chicago Document Number: 19-00054-XXXX-A01	
1.11	Other Actions		
	Lock Attachments	Reservation - <u>View Details</u>	^
100	Printable Authorization Compact Printable		
	Authorization	1 No reservations found.	
	Daily Expenses Summary Trip History		
	View Routing Path	Site Details - <u>View Details</u>	^
	View Routing History Travel Agent Assistance	[Site 1] Begin: Washington, DC, United States on 22-Oct-2018 to Chicago, IL, United States	~
	Extras	[Site 2] End: Chicago, IL, United States on 25-Oct-2018 to Washington, DC, United States	~
	n order to a ther action Other Actior	-	nis can be done under
01	ther action Other Action Lock	ns	is can be done unde
01	ther action Other Action	ns	iis can be done unde
01	ther action Other Action Lock	ns	is can be done unde
01	ther action Other Action Lock Attachments	ns thorization	iis can be done unde
01	ther action Other Action Lock Attachments Printable Aut Compact Prin	ns thorization	iis can be done unde
01	ther action Other Action Lock Attachments Printable Aut Compact Prin	ns thorization ntable	is can be done unde
01	ther action Other Action Lock Attachments Printable Aut Compact Prin Dr scrolling	ns thorization ntable to the bottom of the summary screen:	is can be done unde
01	ther action Other Action Lock Attachments Printable Aut Compact Prin Dr scrolling	Is is thorization ntable to the bottom of the summary screen:	is can be done unde
01	ther action Other Action Lock Attachments Printable Aut Compact Prin Dr scrolling	Iss Ins Ithorization Intable to the bottom of the summary screen: found.	is can be done unde
01	ther action Other Action Lock Attachments Printable Aut Compact Prin Dr scrolling Remarks Receipts and Attach Attached Docume	Iss Ins Ithorization Intable to the bottom of the summary screen: found.	is can be done unde
01	ther action Other Action Lock Attachments Printable Aut Compact Prin Dr scrolling Remarks Receipts and Attach Attached Document No receipts of	IS ns thorization ntable to the bottom of the summary screen: found.	is can be done unde
01	ther action Other Action Lock Attachments Printable Aut Compact Prin Dr scrolling Remarks (No remarks Receipts and Attach Attached Documen (No receipts of No receipts of	Is is is thorization ntable to the bottom of the summary screen: found. iments - <u>Edit Details</u> or attachments found. Back to Step 6: Travel Policy	is can be done unde

Step	Action			
6	The top of the screen will let you know the document has now been locked:			
	Ocument has been locked.			
	Review the document in its entirety			
	 Notes: ✓ If this is a true pool, then locking the document keeps the other approvers from entering the document 			
7	At the bottom of the summary screen you'll see buttons for the actions that can be taken:			
	Remarks - <u>Edit Details</u>			
	No remarks found.			
	Receipts and Attachments - <u>Edit Details</u>			
	Attached Documents			
	() No receipts or attachments found.			
	Approve Return Unlock Back to Step 6: Travel Policy			
	If you're planning on not approving it, click the <i>Return</i> button. This will send the document back to the person that created it. You'll be prompted to add comments as to why it's being returned.			
	If you find that you don't have time to approve at this time you would click the <i>Unlock</i> button, that way it's available to another approver.			
	For training purposes, we're going to click <i>Approve</i>			

Step	Action
8	A pop-up appears:
	Confirm Action
	Do you want to proceed?
	Confirm Cancel
	 Click Confirm
9	The Pending Approvals screen appears with a note at the top:
	Authorization 313198 has been successfully approved.

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Objectives:

Exercise #4: Basic Travel Voucher

Create a Basic Travel Voucher (TV)

• Navigate each step of the TV

Instructions: Execute the following steps:

You just returned from a training class in Chicago, IL. You need to create a travel voucher from your existing travel authorization. Your travel dates started October 22-25, 2018. A family member dropped you off and picked you at the airport. Your costs included the following:

Airfare = \$287.00Transaction Fee = \$37.63POV = 50 miles one way (x2) (beginning and end of travel) Hotel = per diem costs /night Lodging Tax = \$22.13/night Parking at hotel = \$10/night Internet Fees = \$10.99 (days of lodging) Rental Car = \$349.67Gas = \$62.25Check Baggage Fee = \$25 (one for beginning and end of travel)

Step	Action	
1	From the My E2 screen: Click on Trips Solutions: TRAVELER'S TRIPS TRAVELER'S PROFILE	SELENA JENKINS // HEATHER RIGGS -
	At a Glance Trips Local Travel Open Authorization Group Authorization Group Authorization What would you like to do today? Make Reservations Go	Bulletins 20-Mar-2019: Once you access your E2 account for the first time, click Profile to view and <u>read more</u> 20-Mar-2019: Remember to always book a FedRooms hotel with your trip
	To Do List <u>Create Voucher</u> for Travel Authorization 313198 Travel Training Chicago to Chicago, IL, United States departing 22-Oct-2018.	Pending Approvals No pending approvals found.
		Additional Notices No additional notices found.
	Notes: ✓ Under the To Do List you may have a link tha ✓ Travel Arranger go to Travel For Others, selec	

Step	Action
2	The <i>Trips</i> tab shows authorizations and vouchers that are consolidated under a single Trip ID number:
	At a Glance Trips Local Travel Open Authorization Group Authorization
	✓ Filter Options Order by: Departure Date Sort Ascending Sort Descending Trip Id OA/GA# Destination Departure Date Purpose Approver Auth Voucher Advance Show Copy Trip Archive 313198 Chicago, IL, United States 22-Oct-2018 Travel Training Chicago ✓ Showing 1 - 1 of 1 Showing 1 - 1 of 1 In Progress # Revised ③ Pending ✓ Complete ¥ Canceled
	Start a New Authorization Make Reservations Show Held Reservation Copy From Another Trip
3	 Click Show for the document (i.e. Chicago trip) The Trip Dashboard screen appears: Trip Dashboard Traveler Name: SELENA JENKINS Trip ID: 313198
	Authorizations
	Begin Date End Date ID Total Amount Status State Show Delete
	22-Oct-2018 25-Oct-2018 313198 \$2003.73 Approved - Obligation Accepted Show Amend Authorization
	Comparative Trips
	There are no comparative trips associated with this trip.
	Vouchers There are no vouchers associated with this trip. Create Vouchers
	 Click Create Voucher

Step		Action
4	The Step 1: Vo	oucher Basic Information screen appears:
	 Basic Information Expenses Accounting Summary 	Step 1 : Voucher Basic Information Traveler Name: SELENA JENKINS Trip ID: 313198 Voucher Type: Incremental Voucher Status: New
	Extras Trips List Printable Profile	Type of Travel: Training Specific Travel Purpose: Travel Training Chicago Trip Begin Date: 22-Oct-2018 Trip End Date: 25-Oct-2018 Claim Expenses Between: Begin Date: Begin Date: 22-Oct-2018 End Date:* 25-Oct-2018 Document Number: (System Assigned) For this trip this is the:* Select One *Required *
	 Select the F 	Save and Next Step Save
	For this trip this i	s the:* Select One Select One Final Voucher Not Final Voucher
	Click Save	and Next Step
	✓ For trips le	ot the final voucher for this authorization, select Not Final Voucher. ess than 30 days always select final voucher. al expenses need to be filed later that can be filed on a supplemental voucher.

Accounting Summary	Traveler Name							
e zaministy	📀 Basic Infor	e: SELENA JENKINS Trip		Voucher ID: 1 Voucher Type: Final Vouc	her Status: Open Vou	cher - Obligatio	on Accepted	
	Expense Inform	mation						
	Agency Biller	1. 339 73						
	Traveler:	266.00						
ompact Printable Voucher	Unassigned:	0.00						
	Amount:	605.73						
	Elter O	ntions						
	· muero	proces						
	Order by: D	ate • Sort Ascer	nding Sort	Descending				
ew Routing History	Date	Time	Amount	Description	Pau To	Alerte	Modify	Conv. Dala
trac				Description		MERS		
				hanned.			and the second second	STREET, STREET
and the second se				Incernet				
	22-Oct-2018	Fuel		Ladeing supersoin Chicago II. United States	Traveler		Modify	Copy Dele
	22-Oct-2018	Lodging	0.00	including lodging taxes			Modify	
	22-Oct-2018	Meals and Incidentals	266.00	M&IE expense in Chicago, IL, United States	Traveler		Modify	
	22-Oct-2018	Parking	0.00		Traveler		Modify	Copy Dele
	ther Actions emarks tachments initable Voucher ompact Printable Voucher ew Cost Variance ummary aily Expenses Summary pip History ew Routing History ew Routing History tras tras trips List reate Trip Template elete Voucher initable Profile	emarks Expense Inform trachments Agency Billec trintable Voucher Unassigned: www.cost Variance ummary aily Expenses Summary ip History Order by: D tew Routing History Date tras 22-Oct-2018 ips List 22-Oct-2018 intable Profile 22-Oct-2018 22-Oct-2018 22-Oct-2018 22-Oct-2018	emarks emarks ttachments Agency Billed: 339.73 fintable Voucher Fintable Voucher Woost Variance ww Cost Variance ww Routing History ip History Worder by: Date Vipe ttras 22-Oct-2018 Fulfare Common Carrier 22-Oct-2018 Fulfare Expenses Fulfare Context Fulfare Fulf	emarks emarks ttachments Agency Billed: 339,73 Traveler: 266.00 Unassigned: 0.00 Amount: 605.73 ummary aily Expenses Summary ip History order by: Date • Sort Ascending Sort ttras ttras ttras 22-Oct-2018 Airfare Common Carrier 287.00 22-Oct-2018 Business Center 0.00 22-Oct-2018 Fuel 0.00 22-Oct-2018 Fuel 0.00 22-Oct-2018 Keals and incidentals 266.00	Expense Information ttachments Agency Billed: 339,73 ttachments Traveler: 266.00 ompact Printable Voucher 0.00 wer Cost Variance ummary Amount: 605.73 ally Expenses Summary ip History <i>Filter Options</i> Order by: Date Sort Ascending Date Type Amount: 22-Oct-2018 List 22-Oct-2018 Center List 22-Oct-2018 Center 22-Oct-2018 Checked Bag Fee 0.00 Indufing ledging expense in Chicago, IL, United States 22-Oct-2018 Meals and Incidentals 22-Oct-2018 Meals and Incidentals	Expense information Agency Billed: 339.73 Traveler: 266.00 Ompact Printable Voucher Traveler: 266.00 Magency Billed: 0.00 Amount: 605.73 Amount: 605.73 Sort Ascending Sort Descending Order by: Date Sort Ascending Description Pay To Order by: Date Type Amount Description Pay To Order by: Date Type Amount Description Pay To Date Type Amount Description Pay To Expense Summary ips List Sock Ascending Sock Intercention Traveler 22-Oct-2018 Airfare Common Carrier 287.00 Agency Billed 23-Oct-2018 Business Center 0.00 Interveler Traveler 22-Oct-2018 Evel 0.00 Interveler Traveler 22-Oct-2018 Fuel 0.00 Lodging expense in Chicago, IL, United States Traveler 22-Oct-2018 Lodging	Expense Information Expense Information Agency Billed: 339.73 Traveler: 266.00 Ompact Printable Voucher 0.00 Amount: 605.73 Immany Filter Options V Filter Options Order by: Date Sort Ascending Sort Descending Ips List 22-Oct-2018 Airfare Common Carrier 287.00 Argency	Expense information Agency Billed: 339.73 Traveler: 266.00 Ompact Printable Voucher Momunt: 605.73 Immany Filter Options Order by: Date Sort Ascending Sort Descending Order by: Date Sort Ascending Sort Descending Ipission Options Pay To Alerts Modify Ipission Sort Ascending Sort Descending Pay To Alerts Modify Ipission Sort Ascending Sort Descending Pay To Alerts Modify Ipission Sort Ascending Sort Descending Pay To Alerts Modify Ipission Sort Ascending Sort Descending Pay To Alerts Modify Ipission Sort Ascending Sort Descending Pay To Alerts Modify Ipission Sort Ascending Sort Ascending Sort Descending Pay To Alerts Modify Ipission Sort Ascending Sort Ascending Sort Descending <th< th=""></th<>

	100			ses pop-								
L	odging Expense											
		ons 🗸 Ap	ply to All D	<i>Displayed Expenses</i>								
	Lodging Site: 0	Chicago, IL, Uni	ed States									
	Order by: Da	ate	•	Sort Ascending	Sort Descending	3						
	Date	Reimbursem	ent Type	Per Diem Rate	Amount	Authorized	Lodging Tax	Pay To	Day Off	Shared	Notes	Alerts
	22-Oct-2018	Per Diem		223.00	0.00	223.00	0.00	Traveler •				
	23-Oct-2018	Per Diem		223.00	0.00	223.00	0.00	Traveler •		8		
	24-Oct-2018	Per Diem		223.00	0.00	223.00	0.00	Traveler •				
	25-Oct-2018	Per Diem		223.00	0.00	0.00	0.00			No		
				Running Totals:	0.00		0.00					
				Total Lodging:	0.00							
	Save and C	lose Sa	ve E	Total Lodging:	0.00							

The Step 2	Voucher Expen	ses screen appears wit	h the updated	costs:
 Basic Information Expenses Accounting Summary 	Step 2 : Voucher Expenses Traveler Name: SELENA JENKINS Trip	ID: 313198 Voucher ID: 1 Voucher Type: Final Vou	cher Status: Open Voucher - Obligatio	on Accepted
Other Actions Remarks	Expense Information	,		
Attachments Printable Voucher Compact Printable Voucher View Cost Variance Summary Daily Expenses Summary Trip History View Routing History Extras Trips List Create Trip Template Delete Voucher Printable Profile	Agency Billed: 339.73 Traveler: 1001.39 Unassigned: 0.00 Amount: 1341.12 Filter Options Order by: Date Sort Ascen Date Type 22-Oct-2018 Airfare Common Carrier 22-Oct-2018 Business Center 22-Oct-2018 Evel 22-Oct-2018 Evel 22-Oct-2018 Lodging	ding Sort Descending Amount Description 287.00 0.00 Internet 0.00 0.00 735.39 Lodging expense in Chicago, IL, United States	Pay To Alerts Agency Billed Traveler Traveler Traveler Traveler	Modify Copy Delete Modify Copy Delete Modify Copy Delete Modify Copy Delete Modify Copy Delete Modify
	22-Oct-2018 Meals and Incidentals 22-Oct-2018 Parking	266.00 M&IE expense in Chicago, IL, United States 0.00	Traveler Traveler	Modify Modify Copy Delete

Step	Action
6a	The Edit Expense pop-up window appears:
	Edit Expense - Business Center for \$0.00 on 22-Oct-2018
	Detail Remarks Receipts
	Date of Expense:* 22-Oct-2018
	Expense: Business Center
	Amount:* 0.00
	Description: Internet
	Pay To:* Traveler v
	Site of Expense: 22-Oct-2018 Chicago, IL, United States 🔻
	*Required Save and Close Save Exit Window
	Enter the Amount (i.e. 10.99)
	Click Save and Close
	Notes:
	 Receipts should not be placed on the individual expenses.
	✓ When possible all receipts should be scanned into a single document and uploaded uploaded uploaded uploaded uploaded to be a start to be a start with the start and uploaded uplo
	using the attachment link in Other Actions.

Step	Action	
7	The Step 2: Voucher Expenses screen app	ears with the updated costs:
	Expense has been updated successfully.	
	Expense Information	
	Agency Billed: 339.73 Traveler: 1012.38 Unassigned: 0.00 Amount: 1352.11	
	✓ Filter Options	
	Order by: Date Sort Ascending Sort Descending	
	Date Type Amount Description 22-Oct-2018 Airfare Common Carrier 287.00	Pay To Alerts Modify Copy Delete Agency Billed Modify Copy Delete
	22-Oct-2018 Business Center 10.99 Internet	Traveler Modify Copy Delete
	Copy Expense - Business Center for \$10.99 on 22-Oct-2018 Copy the expense to the selected dates.	
	Copy Expense Date Tuesday, 23-Oct-2018	
	 Wednesday, 24-Oct-2018 	
	Thursday, 25-Oct-2018	
	Copy and Close Copy Exit Window	
	 Check the boxes for the dates the expension Click Copy and Close 	se is being copied to

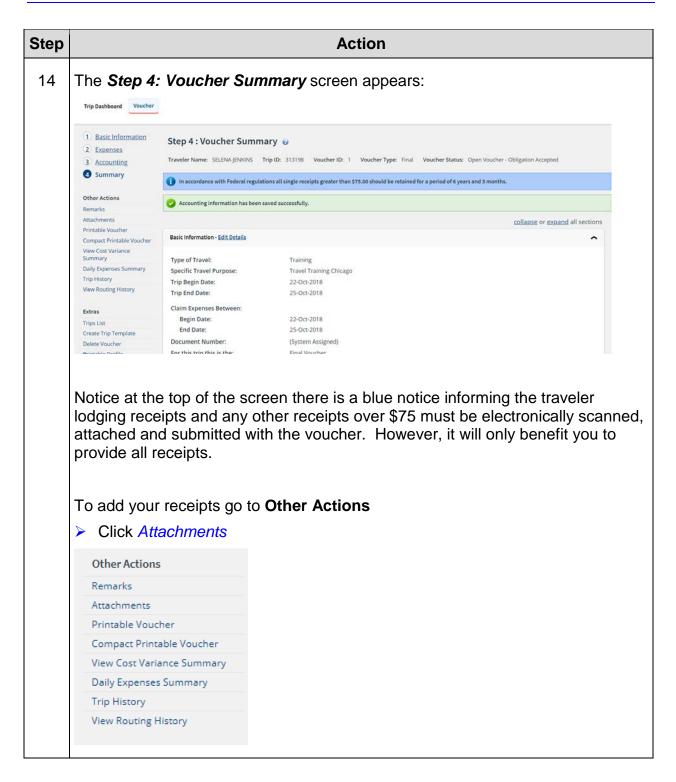
Step		Action
8	The Step 2: Voucl following message	ner Expenses screen appears with the updated costs and the at the top:
	Second Expense has	been copied successfully.
	 Locate the first Click <i>Modify</i> 	Privately Owned Vehicle expense
8a	The Edit Expense	pop-up window appears:
l	Edit Expense - Privately O	wned Vehicle for \$0.00 on 22-Oct-2018
1	Detail Remarks	Receipts
1	Date of Expense:*	22-Oct-2018
l	Expense:	Privately Owned Vehicle
	Subtype:*	Private Auto Authorized
	From:*	home
	To:*	airport
	Distance:*	0.0 Miles ▼ x 0.545 = 0.00 USD
	Pay To:*	Traveler V
	Site of Expense:	22-Oct-2018 Chicago, IL, United States
l		
	*Required	Save and Close Save Exit Window
	 Enter the <i>Distan</i> Click <i>Save and</i> 	

September 201	e has been updated successfull	у.			
Expense In	formation				
Traveler: Unassign Amount:	lled: 339.73 1088.86 ed:				
Order by:					
Date	Туре	Amount Description	Pay To	Alerts	Modify Copy Delete
22-Oct-20 22-Oct-20		287.00 10.99 Internet	Agency Billed Traveler		Modify Copy Delete Modify Copy Delete
22-Oct-20		0.00	Traveler		Modify Copy Delete
	and the second	0.00	Traveler		and the second se
22-Oct-20	18 Lodging	735.39 Lodging expense in Chicago, IL, Unit including lodging taxes	ed States Traveler		Modify
22-Oct-20	18 Meals and Incidentals	266.00 M&IE expense in Chicago, IL, United	States Traveler		Modify
22-Oct-20	18 Parking	0.00	Traveler		Modify Copy Delete
22-Oct-20	18 Privately Owned Vehicle: Private Auto Authorized	54.50 From home to airport - 100 miles @	\$0.545 per mile. Traveler		Modify Copy Delete
22-Oct-20	18 Rental Car	0.00	Traveler		Modify Copy Delete
22-Oct-20	TMC Fee 18 (Accommodated TMC	37.63	Agency Billed		Modify Copy Delete
22-0ct-20 22-0ct-20 22-0ct-20 22-0ct-20 22-0ct-20 22-0ct-20 22-0ct-20 ↓	 Fuel Lodging Meals and Incidentals Parking Privately Owned Vehicle: Private Auto Authorized Rental Car TMC Fee (Accommodated TMC) 	0.00 735.39 Lodging expense in Chicago, IL, Unit including lodging taxes 266.00 M&IE expense in Chicago, IL, United 0.00 54.50 From home to airport - 100 miles @ 0.00	Traveler ed States States Traveler Traveler s0.545 per mile. Traveler Trave	0	Modify Copy Del Modify Modify Modify Copy Del Modify Copy Del Modify Copy Del

22-Oct-2018 22-Oct-2018	Business Center Checked Bag Fee Lodging	10.99 Internet 25.00	Traveler Traveler	Modify Copy Delete Modify Copy Delete	
22-Oct-2018			Traveler	Modify Copy Delete	
	Lodging	Ladalas avasas la Chiesas II. Haltad			
22-Oct-2018		735.39 Lodging expense in Chicago, IL, United including lodging taxes	States Traveler	Modify	
	Meals and Incidentals	266.00 M&IE expense in Chicago, IL, United Sta	ates Traveler	Modify	
22-Oct-2018	Parking	10.00	Traveler	Modify Copy Delete	
22-Oct-2018	Privately Owned Vehicle: Private Auto Authorized	54.50 From home to airport - 100 miles @ \$0	.545 per mile. Traveler	Modify Copy Delete	
22-Oct-2018	TMC Fee (Accommodated TMC Assisted with Air or Rail)	37.63	Agency Billed	Modify Copy Delete	
23-Oct-2018	Business Center	10.99 Internet	Traveler	Modify Copy Delete	
23-Oct-2018	Parking	10.00	Traveler	Modify Copy Delete	
24-Oct-2018	Business Center	10.99 Internet	Traveler	Modify Copy Delete	
24-Oct-2018	Parking	10.00	Traveler	Modify Copy Delete	
25-Oct-2018	Checked Bag Fee	25.00	Traveler	Modify Copy Delete	
25-Oct-2018	Fuel	62.25	Traveler	Modify Copy Delete	
25-Oct-2018	Rental Car	349.67	Traveler	Modify Copy Delete	
25-Oct-2018	Voucher Transaction Fee	15.10 Voucher Transaction Fee	Agency Billed		
Show 10 2	5 50 All items per page			Showing 1 - 16 of 16	
Add New E	kpense		Attachment	🕘 Remark: <mark></mark> Reduced: 	

		Action					
The View Cost Variance Summary pop-up window appears:							
Ň	View Cost Variance Summary	v Cost Variance Summary					
	Trip Duration: 4 days Num	per of Sites: 1					
	Cost Variance Summary	Cost Variance Summary					
	Expense Type	Estimated	Actual	Variance			
	Airfare Common Carrier	287.00	287.00	0.00			
	Business Center	50.00	32.97	-17.03			
	Checked Bag Fee	50.00	50.00	0.00			
	Fuel	65.00	62.25	-2.75			
	Lodging	669.00	669.00	0.00			
	Lodging Tax	75.00	66.39	-8.61			
	Meals and Incidentals	266.00	266.00	0.00			
	Parking	30.00	30.00	0.00			
	Privately Owned Vehicle: Private Auto Authorized	109.00	54.50	-54.50			
	Rental Car	350.00	349.67	-0.33			
	TMC Fee (Accommodated TMC Assisted with Air or Rail)	37.63	37.63	0.00			
	Voucher Transaction Fee	15.10	15.10	0.00			
	Exit Window	2002 22	1000 51	02.22			
auth	s screen allows you to view norizations and what expe are over, under or equal t	nses you've cla	imed on th				
Whe	en finished reviewing, clic	k Exit Window					
The	Step 2: Voucher Expen	ses screen app	ears.				
l							

tep			Action				
13	The Step 3:	Voucher Accounting	g screen appears.				
	Basic Information Expenses Accounting	Step 3 : Voucher Accounting	Voucher ID: 1 Voucher Type: Final Vouch	er Status: Open Vo	ucher - Obligation	Accepted	
	4 Summary Other Actions	Accounting Description Account Code	Obligated Balance	Amount Allocated	Percent	Add to	Delete
	Remarks Attachments Printable Voucher	51.0443000-000.2019-98-01-00-000.01- 02	-03-0005- \$2003.73	Allocated	Allocated	Favorites <u>Add</u>	Delete
	Compact Printable Voucher View Cost Variance Summary		Total: Remaining amount to be allocated: Total claim amount:	\$1920.51 \$0.00 \$1920.51	100.00%		
	Daily Expenses Summary Trip History View Routing History	Select Account Codes					
	Extras Trips List Click Sat	Save and Next Step Save Back to Ve and Next Step	Step 2: Expenses				
	Notes:	-					
	✓ Config the ab	uration is set to only pull ti ility to select a new ACCS bucher should be deleted a ization.	or change it on a vouc	her.			



Step	Action							
15	The Trip-Level Attachments pop-up window appears:							
	Trip-Level Attachments							
	 Never include private or sensitive information, such as social security, credit card or bank account number in fax. 							
	Add New Attachment							
	Add Attachment							
	Size Limit: 10 Megabytes - Allowed Types: PDF,JPG,JPEG,GIF,TIFF,TIF,PNG,BMP,XLS,XLSX,DOC,DOCX,TXT							
	File Name Date Attached Attached By Show Delete							
	Exit Window Attach Fax							
	 There are two ways to add attachments. Adding an existing scanned document Printing a Fax Header Sheet To add an attachment in a fax: Click Attach Fax 							

Step	Action	
15a	The Trip-Level Attachments pop-up window switches to the Fax	option:
	Trip-Level Attachments	Ø
	Never include private or sensitive information, such as social security, credit card or bank account number in fax.	
	Fax Attachment(s)	
	 Print the Fax Cover Page Fax the Cover Page with your attachment(s) to the fax number noted on the Cover Page. After correctly faxing the Fax Cover Page with your attachment(s), the documents will display above within a few moments. 	
	File Name Date Attached Attached By Show Delete	
	Exit Window Add Attachment	
	Click Print the Fax Cover Page	

Step	Action
15a1	The Fax Header page pop-up window opens up:
	https://e2.training.cwtsatotravel.com/ThinkCAP/servlet/LayoutMgr - Google Chrome https://e2.training.cwtsatotravel.com/ThinkCAP/servlet/LayoutMgr Q
	Print This Page Close
	This cover sheet must be the first page faxed with the bar code at the top of the page.
	Never include private or sensitive information, such as social security, credit card or bank account number in fax.
	Include this cover sheet with the receipts and fax to: 1-877-689-9028
	E2 TRAVEL DOCUMENT/EXPENSE REPORTING
	 Click <i>Print This Page</i> if planning on printing out this coversheet for all of your receipts Click <i>Close t</i>o close out this window
	Notes: The fax is received by a company who will then take the receipts sent to them, put it in an electronic format and attach it to the voucher in the E2 Travel system.

Step	Action	
15b	The Trip-Level Attachments Fax option pop-up window:	
	Trip-Level Attachments	Ø
	Never include private or sensitive information, such as social security, credit card or bank account number in fax.	
	Fax Attachment(s)	
	 Print the Fax Cover Page Fax the Cover Page with your attachment(s) to the fax number noted on the Cover Page. After correctly faxing the Fax Cover Page with your attachment(s), the documents will display above within a few moments. 	
	File Name Date Attached Attached By Show Delete	
	Exit Window Add Attachment	
	To add an attachment using an existing scanned document:Click Add Attachments	_

Step	Action								
15b1	The Trip-Level Attachments pop-up window appears:								
	Trip-Level Attachments								
	Never include private or sensitive information, such as social security, credit card or bank acconnumber in fax.	unt							
	Add New Attachment								
	Add Attachment Size Limit: 10 Megabytes - Allowed Types: PDF,JPG,JPEG,GIF,TIFF,TIF,PNG,BMP,XLS,XLSX,DOC,DOCX,TXT								
	Add New Attachment Add Attachment Size Limit: 10 Megabytes - Allowed Types:								
	Exit Window Attach Fax								
	Click Add Attachment								

р		Action	I		
2	The Windows B	rowser pop-up window app	bears:		
	📀 Open		-		X
		Materials + E2 Travel + Travel Basic +	- ↓	Search Travel Basic	P
	Organize New folde	r		· · · · · · · · · · · · · · · · · · ·	0
	Favorites	Name	Date modified	Туре	Size
	L _CBS Training Tea	I Older	6/5/2019 12:04 PM	File folder	
	E Desktop	Receipt Examples	6/6/2019 3:52 PM	File folder	
	🐌 Downloads 🛛 😑	FY 2019 E2 Travel Basic Exercises v1-0	12/17/2018 8:00 A	Microsoft Word D	16.6
	Skecent Places	FY 2019 E2 Travel Basic Exercises v1-0	12/17/2018 8:02 A	Adobe Acrobat D	6,5
	👢 Work from home	FY 2019 E2 Travel Basic Exercises v1-0-1	6/6/2019 3:36 PM	Microsoft Word D	16,
		📜 FY2019 E2 Travel Basic v1-0-2 20190607	6/5/2019 11:21 AM	Adobe Acrobat D	2
	🚆 Libraries	🌯 FY2019 E2 Travel Basic v1-0-2 20190607	6/5/2019 11:20 AM	Microsoft PowerP	:
	Documents	Travel Reciepts	3/29/2018 3:40 PM	Microsoft Word D	
	🕹 Music	🔁 Travel Reciepts	3/29/2018 3:45 PM	Adobe Acrobat D	
	Pictures				
	JUDE Videos				
	K Computer	•			•
	Computer				
	File nam	ie:		Files	▼
			0	Open - Cance	1
	Select the file	to attach			
	Click Open				
	,				
	Notes:				
	The above documen	t shown in the training documen	t seems to refle	ect that it's only	the hotel

15c		1	Action	
·	The Trip-Level Atta showing:	achments pop-up	window appea	ears with the new attachment
	Trip-Level Attachments			Ø
	(i) Never include private or se number in fax.	nsitive information, such as social se	curity, credit card or bank ac	ccount
	Travel Reciepts.pdf was such	ccessfully uploaded.		
	Add New Attachment			
	<u>Add Attachment</u> Size Limit: 10 Megabytes - A PDF,JPG,JPEG,GIF,TIFF,TIF,PN	llowed Types: IG,BMP,XLS,XLSX,DOC,DOCX,TXT		
	File Marrie	Dete Attended	Attacked Dr. Cham Del	
	File Name Authorization Financial Syster Transaction Record	Date Attached n 06-Jun-2019 12:45:37 PM CDT	Attached By Show Del E2 Solutions Show	lete
	Travel Reciepts.pdf	07-Jun-2019 08:21:13 AM CDT	RIGGS, <u>Show Del</u> HEATHER	elete
16	 Click Exit Winde The Step 4: Vouch Step 4: Voucher Summary Traveler Name: SELENA JENKINS Trip ID: 31 	er Summary scre		r - Obligation Accepted
16	The Step 4: Vouch	er Summary SCre	Voucher Status: Open Voucher	
16	The Step 4: Vouch Step 4: Voucher Summary @ Traveler Name: SELENA JENKINS Trip ID: 31	er Summary SCre	Voucher Status: Open Voucher	
16	The Step 4: Vouch Step 4: Voucher Summary @ Traveler Name: SELENA JENKINS Trip ID: 31	er Summary SCre	Voucher Status: Open Voucher	š.

Step	Action	
17	At the bottom of the Voucher Summary if nothing else needs to be added changed:	or
	Remarks - Edit Details	~
	No remarks found.	
	Receipts and Attachments - Edit Details	~
	Trip Attachments - Trip ID: 313198	
	Uploaded By Date Submitted File Name Show	
	E2 Solutions 06-Jun-2019 12:45:37 PM CDT Authorization Financial System Transaction Record Show	
	RIGGS, HEATHER 07-jun-2019 8:21:13 AM CDT Travel Reciepts.pdf Show	
	Send to Traveler Back to Step 3: Accounting	
18	 Click Send to Traveler Notes: ✓ For the arrangers, the button will see send to Traveler. The Confirm Action pop-up appears: 	
10	Confirm Action	
	Do you want to proceed?	
	Confirm Cancel	
	Click Confirm	

ер	p Action						
19	The Trip C	Dashboa	ard scree	en appe	ars with a notification a	at the top.	
Solutions' TRAVELER'S TRIPS TRAVELER'S PROFILE SELENA JEN							HEATHER RIGGS
	Trip Dashboard Voucher						
	Quick Links	Trip Dashbo	ard				
	None available	Traveler Name: SE	LENAJENKINS Trip ID:	313198			
	Extras	O Voucher 313198	(1) has been successfully s	ent to traveler.			
	Trips List					collap	ase or expand all sections
	Cancel Trip not allowed at this time	Authorizations					^
	Create Trip Template	Begin Date	End Date	ID	Total Amount Status	State Show	Delete
		22-Oct-2018	25-Oct-2018	313198	\$2003.73 Approved - Obligation Accepted	Y Show	
		Amend Author	orization				
		Comparative Trips					^
				Th	ere are no comparative trips associated with this trip.		

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Exercise #5: Log into the System and Send TV to Approver

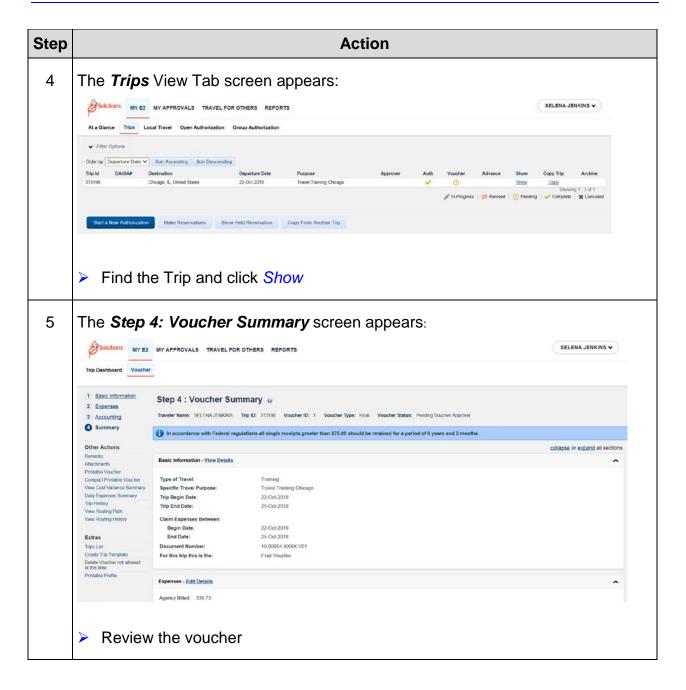
Objectives:

- Log in as a traveler
- Find your Voucher and Send to Approver after reveiw

Instructions: Execute the following steps:

Step	Step
1 From the <i>E2 Login</i> screen:	1
E2 User Id Password Ecryct Eassword Login	
Login Help Warning About E2 Solutions This is a U.S. Federal Gou Unauthorized access is a gGSA eTravel Program Privacy Act Notice This system contains info (Public Law 93-579).	
 Enter E2 User ID Enter Password Click Login 	
Copyright 2003 Copyright 2003 Copyright 2003 Copyright 2003	

Step	Action			
2	A Warning Banner appears:			
	WARNING MESSAGE AND PRIVACY ACT NOTICE			
	WARNING MESSAGE	<u> </u>		
	This is a U.S. Federal Government information system that is "FOR OFFICIAL USE ONLY." Unauthorized access is a violation of U.S. Law and may result in criminal or administrative penalties Users shall not access other user' or system files without proper authority. Absence of access controls IS NOT authorization for access1 Information systems and equipment related to the E-Gov Travel Service are intended for communication, transmission, processing, and storage of U.S. Government information. These systems and equipment are subject to monitoring by law enforcement and authorized officials. Monitoring may result in the acquisition, recording, and analysis of all data being communicated, transmitted, processed, or stored in this system by law enforcement and authorized officials. Use of this system constitutes consent to such monitoring.	A.		
	PRIVACY ACT NOTICE			
	CW Government Travel, Inc. wants to make your experience online satisfying and safe. We want to provide you with the means to control your privacy and give you a way to voice questions or concerns you may have. This company will hold ownership of any information you provide us. We will not sell ownership of this data to any other company or organization. We will not transfer information to competitors. If you are providing personal information within a registration page, it will only be used within our domain unless you choose to allow third party data sharing.			
	Your Acceptance of these Terms By using this site, you agree to our Privacy Policy. We may change the Policy from time to time, so			
	 Accept Click Accept 			
3	The <i>My E2</i> screen appears:			
	Solutions MY E2 MY APPROVALS TRAVEL FOR OTHERS REPORTS	SELENA JENKINS V		
	At a Glance Trips Local Travel Open Authorization Group Authorization			
	At a searce inps Local irave Upen Authonization Group Authonization			
	Start a Travel Document	Builetins		
	What would you like to do today? Make Reservations	20-Mar-2019: Once you access your E2 account for the first time, click Profile to view and <u>read.invet</u> 20-Mar-2019: Remember to always book a FedRooms hotel with your trip		
	To Do List	Pending Approvals		
	() No to do list items found.	Voucher 313198 for \$1020.51 for Trip ID 313108 to Chicago. IL, United States from 22. Dct-2018 to 25-Oct-2018 is pending approval from JENKINS, SELENA		
		Additional Notices		
		No additional notices found.		
	Click the Trips View Tab			



Step	Action				
6	When finished reviewing scroll to the bottom of the Summary screen:				
	Remarks - Edit Details	~			
	No remarks found.				
	Receipts and Attachments - Edit Details	^			
		Show			
		Show			
	Approve Modify Voucher Back to Step 3: Accounting				
l	Click Approve				
7	A pop-up appears: Confirm Action I hereby assign to the United States any right I may have against any parties in connection with reimbursable transportation charges described below, purchased under cash payment procedures (41CFR 101-41.203-2). I certify that this voucher is true and correct to the best of my knowledge and belief, and that payment or credit has not been received by me. Do you want to proceed? Confirm Cancel				
	Click Confirm				
8	The Pending Approvals screen appears with a note at the top:				
	Voucher 313198(1) has been successfully approved.				

Objectives:

Exercise #6: Approve a Voucher – Disapprove Cost

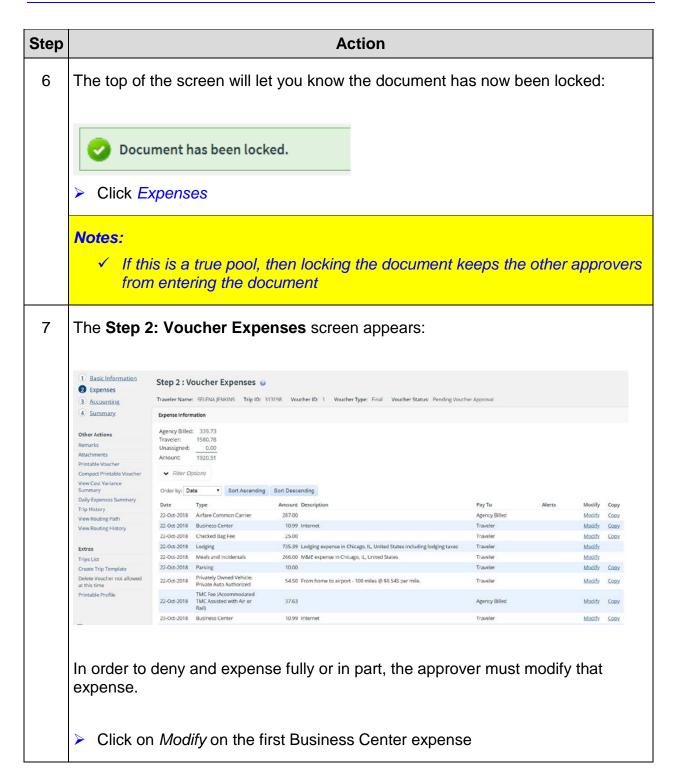
- Approve a Travel Authorization for training purposes
 - Disapprove an expense

Instructions: Execute the following steps:

Step	Action			
1	From the Approver's <i>My E2</i> screen:			
	Solutions TRAVELER'S TRAVELER'S PROFILE	SELENA JENKINS // HEATHER RIGGS 🗸		
	At a Glance Trips Local Travel Open Authorization Group Authorization			
	Start a Travel Document What would you like to do today? Make Reservations Go	Bulletins 20-Mar-2019: Once you access your E2 account for the first time, click Profile to view andread.more 20-Mar-2019: Remember to always book a FedRooms hotel with your trip		
	To De List	Pending Approvals		
	No to do list items found.	Voucher 313198 for 51920.51 for Trip ID 313198 to Chicago. IL. United States from 22-Oct-2018 to 25-Oct-2018 is pending approval from DOCAPRST25		
		Additional Notices		
		No additional notices found.		
	Click the Names in the top right corner			
2	A drop down listing appears:			
	SELENA JENKINS // HEATHER RIGGS 🗸			
	Stop arranging for SELENA JENKINS			
	Message Center 🔒			
	Online Help			
	Logout			
	Click Stop arranged for:			

Step	Action
3	The Travel for Others screen appears:
	Travel for Others
	Filter Options. (Filtering is on)
	Agency: Dept of Commerce *
	Organization: National Oceanic and Atmospheric Administration disabled
	Major Customer: NOAA NWS 20-01 Nat Weather Service disabled *
	Minor Customer: Please select a Minor customer
	- OR -
	Only show travelers for whom you are a designated travel arranger Minor Customer: Please select a Minor customer
	Traveler Information
	Last Name: First Name: Email: E2 User Id: doctrost25
	Email: E2 User Id: doctrvat25
	Apply Filter
	Order by Name Sort Ascending Sort Descending Name Arrange Travel Email Address E2 User Id Major Customer Customer
	JENKINS, SELENA Arrange e2null@cwtsatotravel.com DOCTRVST25 NOAA NWS 20-01 Nat Weather Service NOAA NWS 20-01-0003-02-00 Communications Div
4	 Click the <i>My Approvals</i> The <i>Pending Approvals</i> screen appears:
·	Pending Approvals
	Filter Options Order by: Approval Pending Time Soft Ascending Soft Descending
	ID Traveler Name Destination Start/Departure Date Status Approval/Pending Time Show 313198(1) JENKINS, SELENA Chicago, IL, United States 32-Oct-2018 Pending Approval/DOCAPRST25) 0 Days, 2 Hours Show
	Click Show for the document you want to approve
	Notes:
	 ✓ All documents awaiting your approval will appear with the latest one at the top ✓ You can use the filter options to rearrange how the documents show

Step		Action			
5	The Step 4: Voucher Su	<i>immary</i> screen appears:			
	Step 4 : Voucher Summary 🥹				
	Traveler Name: SELENA JENKINS Trip ID: 313198 Vouch	her ID: 1 Voucher Type: Final Voucher Status: Pending Voucher Approval			
	() In accordance with Federal regulations all single receipts gre	ater than \$75.00 should be retained for a period of 6 years and 3 months.			
		<u>collapse</u> or <u>expand</u> all sections			
	Basic Information - <u>View Details</u>	^			
	Type of Travel: Training				
	Specific Travel Purpose: Travel Training Trip Begin Date: 22-Oct-2018	; cnicago			
	Trip End Date: 25-Oct-2018				
	Claim Expenses Between: Begin Date: 22-Oct-2018				
	End Date: 25-Oct-2018				
	Document Number: 19-00054-XXX For this trip this is the: Final Voucher	6401			
	Other Actions Lock Attachments Printable Authorization Compact Brintable				
	Compact Printable				
	Or scrolling to the bottom of the summary screen:				
	Remarks				
	1 No remarks found.				
	Receipts and Attachments - Edit Details				
	Attached Documents				
	i No receipts or attachments found.				
	Lock Back to Step 6: Travel Policy				
	Click Lock				



Step	Action
8	 Statement - Business Center for \$10.99 on 22-02-2018 Littement - Business Center for \$10.99 on 22-02-2018 Littement - Business Center for \$10.99 on 22-02-02-018 Remark: Description: D99 on 20-02-02-018 Chilogo. IL, United Statess - Description: Descriptio
9	The Step 2: Voucher Expenses screen appears with a note at the top:
	1 The Business Center expense on 22-Oct-2018 has a zero amount. Expense amount of \$0.00 will result in no reimbursement for the expense.
	 Deny any other Business Center Cost for the same reason when finished: Click Next Step

Step			Action				
10	The Step 3: Vouc	The Step 3: Voucher Accounting screen appears:					
	Step 3 : Voucher Accounting 🥑						
	Traveler Name: SELENA JENKINS Trip ID:	T-1	her Type: Final Voucher Status: Pendin	g Voucher Approval			
	Accounting			0			
	Description Account Code		Obligated Balance	Amount Allocated	Percent Allocated	Add to Favorites Delete	
	51 0443000-000 2019-98-01-	-00-00-000 01-03-0005-02	\$2003.73	5 1887.54	100.00%	Add Delete	
			Total: Remaining amount to be allocated: Total claim amount:	\$1887.54 \$0.00 \$1887.54	100.00%		
	Select Account Codes						
	Save and Next Step Save	Back to Step 2: Expenses					
	Notes:						
	Anytime an exper	nse is modified	d clicking next st	ep needs	to be d	one in ordel	r to
	update the accou						
		Ŭ					
10	The Stop 4: Vour	shor Summar	V seroon appoar	·• ·			
10	The Step 4: Voud		y screen appear	5.			
	Step 4 : Voucher Summary	0					
	Traveler Name: SELENA JENKINS Trip I	D: 313198 Voucher ID: 1 Vou	icher Type: Final Voucher Status: Pend	ling Voucher Approval			
	In accordance with Federal regulations	all single receipts greater than \$75.00	should be retained for a period of 6 years and	i 3 months.			
	Accounting information has been saved	i successfully.					
					2	ollapse or expand all section	ons
	Basic Information - View Details					-	~
	Type of Travel:	Training					
	Specific Travel Purpose:	Travel Training Chicago					
	Trip Begin Date:	22-Oct-2018					
	Trip End Date:	25-Oct-2018					
	Claim Expenses Between:						
	Begin Date: End Date:	22-Oct-2018 25-Oct-2018					
	Document Number:	19-00054-XXXX-V01					
	For this trip this is the:	Final Voucher					
		the second states					
	Scroll to the be	ottom of the so	creen				

Step		Ac	ction	
11	Remarks - Edit Details			^
				Expand Remarks
	Voucher Remarks - Voucher ID: 313198(1)			-
			n with reimbursable transportation charges described below, p o the best of my knowledge and belief, and that payment or cre	
	Evnence - 27-Drb-2018 of type: Rusiness Center for \$ 00 USD			
	Receipts and Attachments - Edit Details			^
	Trip Attachments - Trip ID: 313198			2010.0
	Uploaded By	Date Submitted	File Name	Show
	E2 Solutions	06-Jun-2019 12:45:37 PM CDT	Authorization Financial System Transaction Record	Show
	RIGGS, HEATHER	07-Jun-2019 8:21:13 AM CDT	Travel Reciepts.pdf	Show
12	A pop-up appears: Confirm Action The Business Center expense of amount of \$0.00 will result in or The Business Center expense of amount of \$0.00 will result in or The Business Center expense of amount of \$0.00 will result in or Do you want to proceed? Confirm Cancel Cancel	no reimbursement for the ex on 23-Oct-2018 has a zero an no reimbursement for the ex on 24-Oct-2018 has a zero an	xpense. nount. Expense xpense. nount. Expense	
13		/s screen appea	rs with a note at the top:	
	📀 Voucher 313198(1) ha	as been successful	lly approved.	

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Objectives:

Exercise #7: Supplemental Travel Voucher

• Create a Supplemental Travel Voucher (TV)

• Navigate each step of the TV

Instructions: Execute the following steps:

You ended up incurring parking expenses at the airport when your family dropped you off and picked up you.

Step	Action
1	From the <i>My E2</i> screen:
	 Click on the <i>Trips</i> tab
	Solutions TRAVELER'S TRIPS TRAVELER'S PROFILE SELENA JENKINS // HEATHER RIGGS •
	At a Glance Trips Local Travel Open Authorization Group Authorization
	Start a Travel Document Bulletins
	What would you like to do today? Make Reservations
	To Do List Pending Approvals
	No to do list items found. No pending approvals found.
	Additional Notices
	No additional notices found.
2	The Trips tab shows authorizations and vouchers all grouped under a trip number:
	At a Glance Trips Local Travel Open Authorization Group Authorization
	Filter Options Order by: Departure Date * Sort Ascending Sort Descending
	Trip Id OA/GA# Destination Departure Date Purpose Approver Auth Voucher Advance Show Copy Trip Archive
	313198 Chicago, IL, United States 22-Oct-2018 Travel Training Chicago V Show Edgy Acchive Showing 1 - 1 of 1
	n Progress 🔁 Revised 🕜 Pending 🖌 Complete 🗙 Canceled
	Start a New Authorization Make Reservations Show Held Reservation Copy From Another Trip
	Click Show for the document (i.e. Chicago trip)

Step			Acti	on			
3	The Trip Dash	<i>board</i> screer	appears:				
	Trip Dashboard Traveler Name: SELENA JENKINS	Trip ID: 313198					
					colli	a <u>pse</u> or <u>expand</u> all sections	s
	Authorizations Begin Date End Dat	te ID	Total Amount Status		State Show	► Delete	
	22-Oct-2018 25-Oct-		\$2003.73 Closed		State Show	Delete	
	Amend Authorization						
	Comparative Trips					^	
	Vouchers		here are no comparative trips	associated with this trip.			
	Cut Off Date Doc Nu		Туре	Amount Status	State Show	Delete	
	 Click Creat 	54-3000X-V01 1	Final	\$1887.54 Closed	Show		
	 Basic Information Expenses Accounting Summary 		Basic Information		be: Supplemental Vouche	r Status: New	
	Extras Trips List	Type of Travel: Specific Travel Purpose	Training e: Travel T	raining Chicago			
	Printable Profile	Trip Begin Date: Trip End Date: Claim Expenses Betwe	22-Oct-: 25-Oct-:				
		Begin Date: End Date:	22-Oct- 25-Oct-	2018			
		Document Number: *Required	(System	Assigned)			
		Save and Next Step	Save				
	=						
	Click Save	and Next Ste	ep				
	Notes:						
		nses incurred bu ntal voucher.	it not claimed oi	n the initial final	voucher must b	e claimed on	а

				enses screen app	curo.			
Trip Dashboard Voucher								
1) Basic Information	Step 2 : V	oucher Exp	enses 😈					
2 Expenses 3 Accounting	Traveler Name	SELENA JENKIN	5 Trip ID: 3	13198 Voucher ID: 2 Voucher Type: Supplement	al Voucher Status: Open Voucher - Obligatio	n Accepted		
Summary	Sasic Infor	mation has been s	uccessfully upd	lated.				
Other Actions								
Remarks	Expense Inform	nation						
Attachments	Agency Billed	15.10						
Printable Voucher	Amount:	15,10						
Compact Printable Voucher								
View Cost Variance Summary	♥ Filter Oj	ptions						
Daily Expenses Summary	Order by: De	ste • Sa	ort Ascending	Sort Descending				
Trip History	Date	Туре		Amount Description	Pay To	Alerts	Modify	Copy Delete
View Routing History	22-Oct-2018			0.00	Traveler			Cooy Delete
	22-Oct-2018	Rental Car		0.00	Traveler			Cooy Delete
Extras		Voucher Transac	tion Fee	15.10 Voucher Transaction Fee	Agency Billed			
Trips List							Chauten	1-3 of 3
Create Trip Template						72.000000000000000000000000000000000000		
Delete Voucher	Add New Exp	ense				Attachment:	Remark:	reduced:
Printable Profile								

Step		Action
5a	The Add New E	Expense pop-up window appears:
	Add New Expense	
	Date of Expense:*	22-Oct-2018
	Expense:*	Select Expense Type
	Amount:*	0.00
	Description:	
1	Remark:	Add an Optional Remark
l	Receipt:	Add Receipt Size Limit: 10 Megabytes - Allowed Types: PDF,JPG,JPEG,GIF,TIFF,TIF,PNG,BMP,XLS,XLSX,DOC,DOCX,TXT
	Site of Expense:	Allow selection of site based on date
I		
	*Required	Save and New Save and Close Exit Window
1		
	Choose Dat	
		xpense (parking)
		<i>nount</i> (i.e. 10.99)
l	 Type the De Click Save 	escription (parking at the airport)
l		

Step	Action		
6	The Step 2: Voucher Expenses screen appe	ars with the new	v costs:
	Step 2 : Voucher Expenses 🥑		
	Traveler Name: SELENA JENKINS Trip ID: 313198 Voucher ID: 2 Voucher Type: Supplemental Voucher 9	Status: Open Voucher - Obligation Accepte	d
	Expense has been added successfully.		
			1
	Expense Information Agency Billed: Traveler: 10.99 Amount: 26.09		
	✓ Filter Options		
	Order by: Date Sort Ascending Sort Descending		
	Date Type Amount Description	Pay To	Alerts Modify Copy Delete
	22-Oct-2018 Fuel 0.00	Traveler	Modify Copy Delete
	22-Oct-2018 Parking 10.99 22-Oct-2018 Rental Car 0.00	Traveler	Modify Copy Delete Modify Copy Delete
	25-Oct-2018 Voucher Transaction Fee 15.10 Voucher Transaction Fee	Agency Billed	mounty copy benete
			Showing 1 - 4 of 4
6a	The Copy pop-up window appears: Copy Expense - Parking for \$10.99 on 22-Oct-2018 Copy the expense to the selected dates. Select All		
	Copy Expense Date		
	Tuesday, 23-Oct-2018		
	Wednesday, 24-Oct-2018		
	Thursday, 25-Oct-2018		
	Copy and Close Copy Exit Window		
	 Check the boxes for the dates the expense Click Copy and Close 	e is being copiec	l to

Ex Aj Tr	Expense has been copied successfully. spense information gency Billed: 15.10 raveler: 21.98 mount: 37.08	k.					
A) Tr	gency Billed: 15.10 raveler: 21.98						
Tr	raveler: 21.98						
	✓ Filter Options						
c	Order by: Date • Sort Ascer	nding Sort Descending					
D	Date Type	Amount Description		Pay To	Alerts	Modify C	opy Delete
	12-Oct-2018 Fuel	0.00		Traveler			lopy Delete
	2-Oct-2018 Parking	10.99		Traveler			opy Delete
	2-Oct-2018 Rental Car	0.00		Traveler			opy Delete
2	5-Oct-2018 Parking	10.99		Traveler			lopy Delete
	5-Oct-2018 Voucher Transaction Fee		on Fee	Agency Billed	1 · · ·		
						Showing	1 - 5 of 5
					Attachment:	Romark P	odurad 🜑
≻	Click Next Step	Basic Information					
Th	Click Next St e Step 3: Vou	ep Icher Accounti	<i>ing</i> screen appea	ars:			
Th	Click Next Ste e Step 3: Vou	ep Icher Accounti					
Th	Click Next Ste e Step 3: Vou	ep Icher Accounti	ing screen appea		ion Accepted		
Th Ste Trav	Click Next Ste e Step 3: Vou	ep Icher Accounti			ion Accepted		
Th Ste Trav Acce	Click Next Ste e Step 3: Vou ep 3: Voucher Accountir refer Name: SELENA JENKINS Trip I ounting	ep Icher Accounti	her Type: Supplemental Voucher Status:	: Open Voucher - Obligat		Add to Favorite	-s Delete
Th Ste Trav Acce	Click Next Ste e Step 3: Voud ep 3: Voucher Accountin refer Name: SELENA JENKINS Trip I sunting scription Account Code	ep Icher Accounti			ion Accepted Percent Allocated 100.00%	Add to Favorite Add	
Th Ste Trav Acce	Click Next Ste e Step 3: Voud ep 3: Voucher Accountin refer Name: SELENA JENKINS Trip I sunting scription Account Code	ep Ticher Accountions ng © ID: 313198 Voucher ID: 2 Vouch	her Type: Supplemental Voucher Status: Obligated Balance	: Open Voucher - Obligat Amount Allocated	Percent Allocated		
Th Ste Trav Acce	Click Next Ste e Step 3: Voud ep 3: Voucher Accountin refer Name: SELENA JENKINS Trip I sunting scription Account Code	ep Ticher Accountions ng © ID: 313198 Voucher ID: 2 Vouch	her Type: Supplemental Voucher Status: Obligated Balance \$116.19	Open Voucher - Obligat Amount Allocated S 37.08	Percent Allocated		
Th Ste Trav Acce	Click Next Ste e Step 3: Voud ep 3: Voucher Accountin refer Name: SELENA JENKINS Trip I sunting scription Account Code	ep Ticher Accountions In 313198 Voucher ID: 2 Vouch	her Type: Supplemental Voucher Status: Obligated Balance \$116.19 Total:	Copen Voucher - Obligat Amount Allocated \$ 37.08 \$37.08	Percent Allocated		-s Delete Delete
Th Ste Trav Acce	Click Next Ste e Step 3: Voucher Accountin refer Name: SELENA JENKINS Trip I ounting scription: Account Code 51 0443000-000 2019-98-0	ep Ticher Accountions In 313198 Voucher ID: 2 Vouch	her Type: Supplemental Voucher Status: Obligated Balance \$116.19 Total: Remaining amount to be allocated:	Copen Voucher - Obligat Amount Allocated 5 37.08 \$37.08 \$0.00	Percent Allocated		
Th Ste Trav Acce	Click Next Ste e Step 3: Voud ep 3: Voucher Accountin refer Name: SELENA JENKINS Trip I sunting scription Account Code	ep Ticher Accountions In 313198 Voucher ID: 2 Vouch	her Type: Supplemental Voucher Status: Obligated Balance \$116.19 Total: Remaining amount to be allocated:	Copen Voucher - Obligat Amount Allocated 5 37.08 \$37.08 \$0.00	Percent Allocated		
Th Ste Trav Acce	Click Next Ste e Step 3: Voucher Accountin refer Name: SELENA JENKINS Trip I ounting scription: Account Code 51 0443000-000 2019-98-0	ep Ticher Accountions In 313198 Voucher ID: 2 Vouch	her Type: Supplemental Voucher Status: Obligated Balance \$116.19 Total: Remaining amount to be allocated:	Copen Voucher - Obligat Amount Allocated 5 37.08 \$37.08 \$0.00	Percent Allocated		
Th Ste Trav Acco	Click Next Ste e Step 3: Voud ep 3: Voucher Accountin refer Name: SELENA JENKINS Trip I sunting scription Account Code	ep Ticher Accountions In 313198 Voucher ID: 2 Vouch	her Type: Supplemental Voucher Status: Obligated Balance \$116.19 Total:	Copen Voucher - Obligat Amount Allocated \$ 37.08 \$37.08	Percent Allocated		
Th Ste Trav Acce	Click Next Ste e Step 3: Voucher Accountin refer Name: SELENA JENKINS Trip I ounting scription: Account Code 51 0443000-000 2019-98-0	ep Ticher Accountions In 313198 Voucher ID: 2 Vouch	her Type: Supplemental Voucher Status: Obligated Balance \$116.19 Total: Remaining amount to be allocated:	Copen Voucher - Obligat Amount Allocated 5 37.08 \$37.08 \$0.00	Percent Allocated		

-				Action	
	، The Step	4: Voucher S	Summary scr	een appears:	
	Trip Dashboard Voucher				
	1 Basic Information				
	2 Expenses 3 Accounting	Step 4 : Voucher Summ Traveler Name: SELENA JENKINS		ucher Type: Supplemental Voucher Status: Open Voucher - Obligation Accepte	d
	3 Summary	1 in accordance with Federal regula	ations all single receipts greater than \$75.00	should be retained for a period of 6 years and 3 months.	
	Other Actions Remarks	Accounting information has been	saved successfully.		
	Attachments Printable Voucher				collapse or expand all sections
	Compact Printable Voucher	Basic Information - Edit Details			^
	View Cost Variance Summary	Type of Travel:	Training		
	Daily Expenses Summary Trip History	Specific Travel Purpose: Trip Begin Date:	Travel Training Chicago 22-Oct-2018		
	View Routing History	Trip End Date:	25-Oct-2018		
	Extras	Claim Expenses Between:			
	Trips List	Begin Date:	22-Oct-2018		
	Create Trip Template Delate Voucher	End Date: Document Number:	25-Oct-2018 (System Assigned)		
	Printable Profile				
	changed: Remarks - Edit Details				•
	-				
	-	ıcher ID: 313198(1)			Expand Remarks
	Remarks - Edit Details Voucher Remarks - Vou JENKINS, SELENA 0 I hereby assign to th	7-Jun-2019 9:53 AM CDT ie United States any right I may ha		on with reimbursable transportation charges described below, purch to the best of my knowledge and belief, and that payment or credit	Expand Remarks
	Remarks - Edit Details Voucher Remarks - Vou JENKINS, SELENA O I hereby assign to th payment procedures by me.	7-Jun-2019 9:53 AM CDT ie United States any right I may ha			Expand Remarks
	Remarks - Edit Details Voucher Remarks - Vou JENKINS, SELENA O I hereby assign to th payment procedures by me.	7-Jun-2019 9:53 AM CDT le United States any right 1 may hi s (41CFR 101-41.203-2). I certify th nume: Business Center for \$ 00.1150			Expand Remarks
	Remarks - Edit Details Voucher Remarks - Vou JENKINS, SELENA 0 I hereby assign to th payment procedures by me.	7-Jun-2019 9:53 AM CDT te United States any right I may ha s (41CFR 101-41.203-2). I certify th hume: Business Center for \$ 00.1150 ts - Edit Details			Expand Remarks
	Remarks - Edit Details Voucher Remarks - Vou JENKINS, SELENA 0 I hereby assign to th payment procedures by me. Exmenses - 22.0ct-2018.of	7-Jun-2019 9:53 AM CDT te United States any right I may ha s (41CFR 101-41.203-2). I certify th hume: Business Center for \$ 00.1150 ts - Edit Details			Expand Remarks
	Remarks - Edit Details Voucher Remarks - Vou JENKINS, SELENA O I hereby assign to th payment procedures by me. Exmense, 22.Oct,2018.edf Receipts and Attachment Trip Attachments - Trip Uploaded By E2 Solutions	7-Jun-2019 9:53 AM CDT te United States any right I may ha s (41CFR 101-41.203-2). I certify th hume: Business Center for \$ 00.1150 ts - Edit Details	Date Submitted 06-jun-2019 12:45:37 PM CDT	to the best of my knowledge and belief, and that payment or credit File Name Authorization Financial System Transaction Record	Expand Remarks
	Remarks - Edit Details Voucher Remarks - Vou JENKINS, SELENA O I hereby assign to th payment procedures by me. Exmense - 22-Oct-2018.of Receipts and Attachment Trip Attachments - Trip Uploaded By E2 Solutions RIGGS, HEATHER	7-Jun-2019 9:53 AM CDT te United States any right I may ha s (41CFR 101-41.203-2). I certify th hume: Business Center for \$ 00.1150 ts - Edit Details	Date Submitted 06-Jun-2019 12:45:37 PM CDT 07-Jun-2019 8:21:13 AM CDT	to the best of my knowledge and belief, and that payment or credit File Name Authorization Financial System Transaction Record Travel Reciepts.pdf	Expand Remarks hased under cash has not been received Show Show Show Show Show
	Remarks - Edit Details Voucher Remarks - Vou JENKINS, SELENA O I hereby assign to th payment procedures by me. Exmense, 22.Oct,2018.edf Receipts and Attachment Trip Attachments - Trip Uploaded By E2 Solutions	7-Jun-2019 9:53 AM CDT te United States any right I may ha s (41CFR 101-41.203-2). I certify th hume: Business Center for \$ 00.1150 ts - Edit Details	Date Submitted 06-jun-2019 12:45:37 PM CDT	to the best of my knowledge and belief, and that payment or credit File Name Authorization Financial System Transaction Record	Expand Remarks hased under cash has not been received Show Show Show
	Remarks - Edit Details Voucher Remarks - Vou JENKINS, SELENA O I hereby assign to th payment procedures by me. Exmense - 22-Oct-2018.of Receipts and Attachment Trip Attachments - Trip Uploaded By E2 Solutions RIGGS, HEATHER	7-Jun-2019 9:53 AM CDT te United States any right I may ha s (41CFR 101-41.203-2). I certify th hume: Business Center for \$ 00.1150 ts - Edit Details	Date Submitted 06-Jun-2019 12:45:37 PM CDT 07-Jun-2019 8:21:13 AM CDT	to the best of my knowledge and belief, and that payment or credit File Name Authorization Financial System Transaction Record Travel Reciepts.pdf	Exoand Remarks hased under cash has not been received Show Show Show Show Show
	Remarks - Edit Details Voucher Remarks - Vou JENKINS, SELENA O I hereby assign to th payment procedures by me. Example, 22.0ct.2018 of Receipts and Attachment Trip Attachments - Trip Uploaded By E2 Solutions RIGGS, HEATHER E2 Solutions Send to Traveler	7-Jun-2019 9:53 AM CDT le United States any right I may ha s (41CFR 101-41.203-2). I certify th nume: Rusinesse Center for \$ 00.1160 to - Edit Details	Date Submitted O6-Jun-2019 12:45:37 PM CDT 07-Jun-2019 12:05:7 PM CDT 07-Jun-2019 1:50:57 PM CDT	to the best of my knowledge and belief, and that payment or credit File Name Authorization Financial System Transaction Record Travel Reciepts.pdf	Exoand Remarks hased under cash has not been received Show Show Show Show Show
>	Remarks - Edit Details Voucher Remarks - Vou JENKINS, SELENA O I hereby assign to th payment procedures by me. Example, 22.0ct.2018 of Receipts and Attachment Trip Attachments - Trip Uploaded By E2 Solutions RIGGS, HEATHER E2 Solutions Send to Traveler	7-Jun-2019 9:53 AM CDT ie United States any right I may hi s (41CFR 101-41.203-2). I certify th hume: Business: Center for \$ 00.1150 to - Edit Details o ID: 313198 Back to Step 3: Accounting	Date Submitted O6-Jun-2019 12:45:37 PM CDT 07-Jun-2019 12:05:7 PM CDT 07-Jun-2019 1:50:57 PM CDT	to the best of my knowledge and belief, and that payment or credit File Name Authorization Financial System Transaction Record Travel Reciepts.pdf	Exoand Remarks hased under cash has not been received Show Show Show Show Show

Step	Action
10	The Confirm Action pop-up appears:
	Confirm Action
	Do you want to proceed?
	Confirm
	Click Confirm
11	The Trip Dashboard screen appears with a notification at the top.
	Supplemental Voucher 313198(2) has been successfully sent to traveler.

Exercise #8: Reclaim Travel Voucher

Objectives:

• Create a Reclaim Travel Voucher (TV)

• Navigate each step of the TV

Instructions: Execute the following steps:

Your approving Official denied the following expenses:

Internet Fees = \$10.99 (10/23-10/25)

So you will do the following to reclaim the expenses.

Step	A	ction
1	From the My E2 screen: Click on Trips Solutions: TRAVELER'S TRIPS TRAVELER'S PROFILE At a Glance Trips Local Travel Open Authorization Group Authorization	SELENA JENKINS // HEATHER RIGGS -
	What would you like to do today? Make Reservations Go	Bulletins A 20-Mar-2019: Once you access your E2 account for the first time, click Profile to view and <u>read more</u> A 20-Mar-2019: Remember to always book a FedRooms hotel with your trip
	To Do List 1 No to do list items found.	Pending Approvals Voucher 313198 for \$37.08 for Trip ID 313198 to Chicago, IL, United States from 22-Oct-2018 to 25-Oct-2018 is pending approval from JENKINS, SELENA
		Additional Notices No additional notices found.

Step					Action			
2	The Trips number:	tab shows	s author	izations a	nd vouchers a	all group	ed under	a trip
	At a Glance Trips	Local Travel Open A	uthorization Grou	p Authorization				
	Filter Options Order by: Departure Trip Id OA/GA# 313198	Date Sort Ascending Destination Chicago, IL, United States	Sort Descending Departure 22-Oct-20	Date Purpose		Auth Voucher	Advance Show Show	Copy Trip Archive Copy Showing 1 - 1 of 1 Complete Canceled
	Start a New Autho	rization Make Rese	nutions Show	Held Reservation	Copy From Another Trip			
	Start a New Auto	Make Rese	anov	riela Reservation	Copy From Another Trip			
		how for th		nont (i. o. (Chicago trip)			
	Click S	snow for tr	ie docur	nent (i.e. v	Chicago trip)			
2	The Trip	Deekheer						
3	The Trip I	Dasnboar	a screer	appears				
	Trip Dashbo	ard						
	Traveler Name: Si	ELENA JENKINS Trip I	D: 313198					
	a de destructure						collapse or expand	all sections
	Authorizations							^
	Begin Date 22-Oct-2018	End Date 25-Oct-2018	ID 313198	Total Amount Sta \$2003.73 Apr	tus proved - Obligation Accepted		Show Dele	te
	Amend Auth	orization						
	Comparative Trips							
			There ar	e no comparative tr	ips associated with this tr	ip.		
	Vouchers							~
	Cut Off Date	Doc Num	ID 1	Гуре	Amount Status	State	Show Dele	te
	25-Oct-2018	19-00054-XXXX-V02	2 5	Supplemental	\$37.08 Pending Approval Review)	(Traveler 🕔	Show	
	25-Oct-2018	19-00054-XXXX-V01	1 /	Final	\$1887.54 Closed	~	Show	
				Total:	\$1924.62			
	Click F	Reclaim						

р		Action
	The Step 1: Trip Dashboard Voucher	Voucher Basic Information screen appears:
	Basic Information Expenses Accounting Summary Extras Trips List Printable Profile	Step 1 : Voucher Basic Information Traveler Name: SELENA JENKINS Trip ID: 31398 Voucher ID: Voucher Type: Reclaim Voucher Status: New Basic Information Training Specific Travel Purpose: Travel Training Chicago Trip Begin Date: 22-Oct-2018 Claim Expenses Between: Egin Date: 22-Oct-2018 End Date: 22-Oct-2018 Begin Date: 22-Oct-2018 Document Number: (System Assigned)
		Save and Next Step Save
		ve and Next Step : Voucher Expenses screen appears:
	The Step 2:	ve and Next Step • Voucher Expenses screen appears: Step 2 : Voucher Expenses Traveler Name: SELENA JENKINS Traveler Name: Step 2 : Voucher Expenses
	The Step 2: Trip Dashboard Voucher Basic Information Expenses Accounting	ve and Next Step Voucher Expenses screen appears: Step 2 : Voucher Expenses @
	Trip Dashboard Voucher Trip Dashboard Voucher 1 Basic Information 2 Expenses 3 Accounting 4 Summary Other Actions Remarks Attachments Printable Voucher Compact Printable Voucher View Cost Variance	ve and Next Step voucher Expenses screen appears: Step 2 : Voucher Expenses Traveler Name: SELENA JENKINS Trip ID: 313198 Voucher Type: Reclaim Voucher Status: Open Voucher - Obligation Accepted Pense Information Verse Information

Step						Acti	on			
5a	Th	e Elig	gible F	Reclaim	Expenses	pop-up	window a	ppears:		
	El	igible Re	claim Expe	enses						
		Expens	e Reclaim S	Selector						
		Select	Date	Туре	Description	Claimed Amount	Approved Amount	Eligible Amount		
			22-Oct- 2018	Business Center	Internet	10.99	0.00	10.99		
			23-Oct- 2018	Business Center	Internet	10.99	0.00	10.99		
			24-Oct- 2018	Business Center	Internet	10.99	0.00	10.99		
	3									
		_								
		Save	and Close	Save	Exit Windo	W				
	A A				heckboxes Save an		n expense	e you wisł	n to reclaim	
	No	tes:								
		 ✓)nly exp eclaim.	enses that	t have been	denied in	full or partia	al by the app	prover will be	eligible for

The Step 2:	Voucl	her Exper	ses screen appears	with the updat	ed re	claim co
1 Basic Information 2 Expenses 3 Accounting 4 Summary	Traveler Name	OUCHER EXPENSE: :: SELENA JENKINS Trip ::penses added to the vouch	ID: 313198 Voucher ID: 3 Voucher Type: Recla	im Voucher Status: Open Vouche	r - Obligation A	uccepted
Other Actions Remarks	Expense Inform	nation				
Attachments Printable Voucher Compact Printable Voucher	 ✓ Filter O Order by: D 		nding Sort Descending			
View Cost Variance Summary	Date	Туре	Amount Description	Pay To	Alerts	Modify Delete
Daily Expenses Summary	22-Oct-2018	Business Center	10.99 Internet	Traveler		Modify Delete
Trip History	23-Oct-2018	Business Center	10.99 Internet	Traveler		Modify Delete
View Routing History	24-Oct-2018	Business Center	10.99 Internet	Traveler		Modify Delete
Extras	25-Oct-2018	Voucher Transaction Fee	15.10 Voucher Transaction Fee	Agency Billed		
Trips List					SH	howing 1 - 4 of 4
Create Trip Template				Attachmen	t: Remark	: Reduced:
Reclaim cos and do the fe			narks added to them.	Find the first	reclai	m exper

Step		Action
6a	The Edit Expe	nse pop-up window appears:
	Edit Expense - Business	Center for \$10.99 on 22-Oct-2018
	Detail Remarks	Receipts
	Date of Expense:	22-Oct-2018
	Expense:	Business Center
	Claimed Amount:	10.99
	Approved Amount:	0.00
	Available Reclaim:	10.99
	Amount:*	10.99
	Remark:*	Add a Required Remark
	Description:	Internet
	Pay To:	Traveler
	Site of Expense:	Chicago, IL, United States
	3	
	40 1	Save and Close Save Exit Window
	*Required	Save and Close Save Exit Window
	Click on Ad	d a Required Remark

Step	Action
6b	The Edit Expense pop-up window appears with the remark expanded:
	Edit Expense - Business Center for \$10.99 on 22-Oct-2018
	Detail Remarks Receipts
	Date of 22-Oct-2018
	Expense: Business Center Claimed 10.99
	Amount: 0.00 Approved 0.00 Amount:
	Available 10.99 Reclaim:
	Amount:* 10.99
	Remark:* Note: Remarks cannot be edited or deleted. Review all information before proceeding.
	Allowed Characters: Aa-Zz 0-9 \$ () / : ? @ , . ' 2000 characters left.
	• • • • • • • • • • • • • • • • • • •
	*Required Save and Close Save Exit Window
	 Enter your <i>Remark</i> (i.e. Used at hotel to do business work) Click <i>Save and Close</i> Repeat for all reclaiming expenses

			Act	tion					
Sc	When finishe showing:	ed Step	2: Voucher Expens	ses screen ap	pears	with all	note	S	
	Step 2 : Voucher	Expenses	0						
	Traveler Name: SELENA J	ENKINS Trip IC	D: 313198 Voucher ID: 3 Voucher Type: R	eclaim Voucher Status: Open	Voucher - Obli	gation Accepted			
	Expense has been updated successfully.								
	Expense Information								
	✓ Filter Options								
	Order by: Date	Sort Ascend	ing Sort Descending						
	Date Type		Amount Description	Pay To	A	lerts Mod	ify Delete		
	22-Oct-2018 Business C	lenter	10.99 Internet	Traveler	<u> </u>	Mod	ify Delete		
	23-Oct-2018 Business C	Ienter	10.99 Internet	Traveler	<u> </u>	Mod	ify Delete		
	24-Oct-2018 Business C	lenter	10.99 Internet	Traveler		Mod	ify Delete		
	25-Oct-2018 Voucher Tr Fee	ransaction	15.10 Voucher Transaction Fee	Agency Bill	led				
						Showing 1	4 of 4		
				Atta	achment:	Remark: <mark></mark> Rec	iuced:		
	Add Reclaim Expenses								
		tack to Step 1: Bas							
7	> Click Nex	Xt Step Vouch Step 3 : Vo Traveler Name: Accounting Description A	Deer Accounting Scree Ducher Accounting @ SELENA JENKINS Trip ID: 313198 Voucher ID: 3	Voucher Type: Reclaim Vouch Obligated Balance	Amount Allocated	Percent Allocated	Add to Favorites	Delete	
7	 Click Nex Click Nex Che Step 3: Trip Dashboard Voucher Basic Information Expenses Accounting Summary Other Actions Remarks Attachments 	Xt Step Vouch Step 3 : Vo Traveler Name: Accounting Description A	Deer Accounting Scree Ducher Accounting © SELENAJENKINS Trip ID: 313198 Voucher ID: 3	Voucher Type: Reclaim Vouch	Amount	Percent	Add to	Delete Delete	
7	 Click Nex Click Nex The Step 3: Trip Dashboard Voucher 1 Basic Information 2 Expenses 3 Accounting 4 Summary Other Actions Remarks 	Xt Step Vouch Step 3 : Vo Traveler Name: Accounting Description A	Deer Accounting Scree Ducher Accounting SELENA JENKINS Trip ID: 313198 Voucher ID: 3 ccount Code 10443000-000 2019-98-01-00-00 01-03-0005-	Voucher Type: Reclaim Vouch Obligated Balance \$116.19 \$ Total:	Amount Allocated 48.07 \$48.07	Percent Allocated	Add to Favorites		
7	 Click Nex Click Nex Click Nex Click Nex Click Nex Click Nex Coucher Accounting Summary Other Actions Remarks Attachments Printable Voucher Compact Printable Voucher Compact Printable Voucher View Cost Variance 	Xt Step Vouch Step 3 : Vo Traveler Name: Accounting Description A	Deer Accounting Scree Ducher Accounting SELENA JENKINS Trip ID: 313198 Voucher ID: 3 ccount Code 10443000-000 2019-98-01-00-00 01-03-0005-	Voucher Type: Reclaim Vouch Obligated Balance \$116.19 \$	Amount Allocated 48.07 \$48.07 \$0.00	Percent Allocated 100.00%	Add to Favorites		
7	 Click Nex Click Nex Click Nex Click Nex Click Nex Counting Expenses Accounting Summary Other Actions Remarks Attachments Printable Voucher Compact Printable Voucher Vew Cost Variance Summary 	Xt Step Vouch Step 3 : Vo Traveler Name: Accounting Description A	Deer Accounting Scree Ducher Accounting SELENA JENKINS Trip ID: 313198 Voucher ID: 3 ccount Code 10443000-000 2019-98-01-00-00 01-03-0005-	Voucher Type: Reclaim Vouch Obligated Balance \$116.19 \$ Total: Remaining amount to be	Amount Allocated 48.07 \$48.07	Percent Allocated 100.00%	Add to Favorites		
7	 Click Nex Click Nex The Step 3: Trip Dashboard Voucher Expenses Accounting Summary Other Actions Remarks Attachments Printable Voucher Compact Printable Voucher Vew Cost Variance Summary Daily Expenses Summary Trip History 	Xt Step Vouch Step 3 : Vo Traveler Name: Accounting Description A	Deer Accounting Scree Ducher Accounting SELENA JENKINS Trip ID: 313198 Voucher ID: 3 ccount Code 10432000 000 2019-98-01-00-00 000 01 03-0005: 2	Voucher Type: Reclaim Vouch Obligated Balance \$116.19 \$ Total: Remaining amount to be allocated:	Amount Allocated 48.07 \$48.07 \$0.00	Percent Allocated 100.00%	Add to Favorites		
7	 Click Nex Click Nex Click Nex Click Nex Click Nex Click Nex Counting Expenses Accounting Summary Other Actions Remarks Attachments Printable Voucher Compact Printable Voucher View Cost Variance Summary Daily Expenses Summary 	Xt Step Vouch Step 3 : Vo Traveler Name: Accounting Description A	Deer Accounting Scree Ducher Accounting SELENA JENKINS Trip ID: 313198 Voucher ID: 3 ccount Code 10432000 000 2019-98-01-00-00 000 01 03-0005: 2	Voucher Type: Reclaim Vouch Obligated Balance \$116.19 \$ Total: Remaining amount to be allocated:	Amount Allocated 48.07 \$48.07 \$0.00	Percent Allocated 100.00%	Add to Favorites		
7	 Click Nex Click Nex The Step 3: Trip Dashboard Voucher Expenses Accounting Summary Other Actions Remarks Attachments Printable Voucher Compact Printable Voucher Vew Cost Variance Summary Daily Expenses Summary Trip History 	Xt Step Vouch Step 3 : Vo Traveler Name: Accounting Description A Select Account	Deer Accounting Scree Ducher Accounting SELENA JENKINS Trip ID: 313198 Voucher ID: 3 ccount Code 1 0443000 000 2019 98-01-00-00 000 01-03-0005: 2	Voucher Type: Reclaim Vouch Obligated Balance \$116.19 \$ Total: Remaining amount to be allocated:	Amount Allocated 48.07 \$48.07 \$0.00	Percent Allocated 100.00%	Add to Favorites		
7	 Click Nex Click Nex Check Step 3: Trip Dashboard Voucher Basic Information Basic Information Expenses Accounting Summary Other Actions Remarks Attachments Printable Voucher View Cost Variance Summary Daily Expenses Summary Daily Expenses Summary Trip History View Routing History 	Xt Step Vouch Step 3 : Vo Traveler Name: Accounting Description A	Deer Accounting Scree Ducher Accounting SELENA JENKINS Trip ID: 313198 Voucher ID: 3 ccount Code 1 0443000 000 2019 98-01-00-00 000 01-03-0005: 2	Voucher Type: Reclaim Vouch Obligated Balance \$116.19 \$ Total: Remaining amount to be allocated: Total claim amount:	Amount Allocated 48.07 \$48.07 \$0.00	Percent Allocated 100.00%	Add to Favorites		
7	 Click Nex Click Nex Click Nex Check Step 3: Trip Dashboard Voucher Expenses Accounting Summary Other Actions Remarks Attachments Printable Voucher Compact Printable Voucher Vew Coxi Variance Summary Daily Expenses Summary Trip History Vew Routing History Extras 	Xt Step Vouch Step 3 : Vo Traveler Name: Accounting Description A Select Account	Deer Accounting Scree Ducher Accounting SELENA JENKINS Trip ID: 313198 Voucher ID: 3 ccount Code 1 0443000 000 2019 98-01-00-00 000 01-03-0005: 2	Voucher Type: Reclaim Vouch Obligated Balance \$116.19 \$ Total: Remaining amount to be allocated: Total claim amount:	Amount Allocated 48.07 \$48.07 \$0.00	Percent Allocated 100.00%	Add to Favorites		

he Step 4: rip Dashboard Voucher Basic Information Expenses Accounting Summary	-	NY 😧 ip ID: 313198 Voucher II ons all single receipts greater	D: 3 Voucher Type: Reclaim Voucher Status: Open Voucher - Obli than \$75.00 should be retained for a period of 6 years and 3 months.	gation Accepted pse or <u>expand</u> all sections			
Basic Information Expenses Accounting Summary summary ther Actions emarks tachments intable Voucher ompact Printable Voucher ew Cost Variance emmary aily Expenses Summary ip History	Traveler Name: SELENA JENKINS Tr In accordance with Federal regulations Accounting information has been so Basic Information - Edit Details Type of Travel: Specific Travel Purpose:	rip ID: 313198 Voucher II ons all single receipts greater wed successfully. Training	than \$75.00 should be retained for a period of 6 years and 3 months.				
Expenses Accounting Summary summary ther Actions imarks tachments intable Voucher wmpact Printable Voucher wmpact Printable Voucher wmpact Printable Voucher we Rostly Expenses Summary ipi History ew Routing History	Traveler Name: SELENA JENKINS Tr In accordance with Federal regulations Accounting information has been so Basic Information - Edit Details Type of Travel: Specific Travel Purpose:	rip ID: 313198 Voucher II ons all single receipts greater wed successfully. Training	than \$75.00 should be retained for a period of 6 years and 3 months.				
Accounting Summary summary ther Actions imarks tachments intable Voucher ompact Printable Voucher ew Cost Variance immary ally Expenses Summary jo History ew Routing History	In accordance with Federal regulation Accounting information has been see Basic Information - Edit Details Type of Travel: Specific Travel Purpose:	ons all single receipts greater wed successfully. Training	than \$75.00 should be retained for a period of 6 years and 3 months.				
Summary ther Actions imarks tachments intable Voucher ew Cost Variance immary alily Expenses Summary ip History ew Routing History	Accounting information has been as Basic Information - Edit Details Type of Travel: Specific Travel Purpose:	ived successfully.		pse or <u>expand</u> all section:			
imarks tachments initable Voucher ompact Printable Voucher www.Cost Variance immary alily Expenses Summary ip History History	Basic Information - Edit Details Type of Travel: Specific Travel Purpose:	Training	colla	pse or expand all section:			
tachments intable Voucher impact Printable Voucher ew Cost Variance immary ally Expenses Summary ip History ew Routing History	Basic Information - Edit Details Type of Travel: Specific Travel Purpose:	Training	colla	pse or expand all section			
intable Voucher ompact Printable Voucher ew Cost Variance immary jily Expenses Summary jily Fixpenses Summary jily History ew Routing History	Type of Travel: Specific Travel Purpose:		coliz	ip <u>se</u> or <u>expand</u> all section:			
ew Cost Variance immary aily Expenses Summary ip History ew Routing History	Type of Travel: Specific Travel Purpose:			^			
immary aily Expenses Summary ip History ew Routing History	Specific Travel Purpose:						
ip History ew Routing History	Specific Travel Purpose:						
ew Routing History	Trip Begin Date:		cago				
		22-Oct-2018					
tras	Trip End Date:	25-Oct-2018					
	Claim Expenses Between:						
ips List	Begin Date: End Date:	22-Oct-2018 25-Oct-2018					
eate Trip Template elete Voucher	Document Number:	(System Assigned)					
At the bottom of the Voucher Summary if nothing else needs to be added or							
•	- Edit Datalla						
Accerpts and Attachment	- Luit Detalla			~			
Trip Attachments - Trip				1.00			
Uploaded By	Date Sub		File Name	Show			
	Date Sub 06-Jun-2		File Name Authorization Financial System Transaction Record Travel Reciepts.pdf	Show Show Show			
	the bottom anged:	the bottom of the Vouche	the bottom of the Voucher Summar hanged:	nanged:			

Step	Action
10	The Confirm Action pop-up appears:
	Confirm Action
	Do you want to proceed?
	Confirm Cancel
	Click Confirm
11	The Trip Dashboard now should have up at the top that the voucher has been sent to the traveler.
	Reclaim Voucher 313198 has been successfully sent to traveler.

Exercise #9: Local Travel Voucher

Objectives:	Create a Local Travel VoucherNavigate each step of the Local Travel Voucher
Notes:	Local Travel is defined as travel that: 1) Is Not Entitled to Per Diem NTR Chapter 16 outlines all requirements of local travel

Instructions: Execute the following steps:

You work in the Germantown, MD office. You've been asked to attend some meetings in Silver Spring, MD. The government car is unavailable for the dates of your meetings, so on February 5th you drive from work and park and on February 7th you park at the metro and take the metro into Silver Spring. (2019)

Actual Expenses

2/5 - 42 miles roundtrip
2/5 - \$5.60 parking (8 hrs at "long term" parking @\$0.70/hr)
2/7 - \$5.20 metro parking (all day)
2/7 - \$10.30 roundtrip metro fare (\$5.15 one way smart trip)
2/7 - 16 miles roundtrip

Step	Action	
1	From the My E2 screen: Click on Local Travel Solutions' TRAVELER'S TRIPS TRAVELER'S PROFILE At a Glance Trips Local Travel Open Authorization Group Authorization	SELENA JENKINS // HEATHER RIGGS 🗸
	Start a Travel Document What would you like to do today? Make Reservations Go	Bulletins Do-Mar-2019: Once you access your E2 account for the first time, click Profile to view and <u>cead more</u> Co-Mar-2019: Remember to always book a FedRooms hotel with your trip.
	To Do List No to do list items found.	Pending Approvals Voucher 313198 for \$37,08 for Trip ID 313198 to Chicago, IL, United States from 22-Oct-2018 to 25-Oct-2018 is pending approval from JENKINS, SELENA Voucher 313198 for \$48,07 for Trip ID 313198 to Chicago, IL, United States from 22-Oct-2018 to 25-Oct-2018 is pending approval from JENKINS, SELENA
		Additional Notices No additional notices found.

Step	Action								
2	The Local Travel tab shows any local vouchers together:								
	At a Glance Trips Local Travel Open Authorization Group Authorization								
	✓ Filter Options								
	Order by: Start Date Sort Descending Sort Descending Claim Id Start Date End Date Purpose Approver Claim Show Copy Trip Archive								
	🚺 No match found.								
	Start a New Claim								
	Click Start a New Claim								
3	The Step 1: Local Travel Basic Information screen appears:								
	Solutions' TRAVELER'S TRIPS TRAVELER'S PROFILE SELENA JENKINS // HEATHER RIGGS ~								
	Basic Information Step 1 : Local Travel Basic Information Expenses								
	Accounting Traveler Name: SELENA JENKINS Local Claim ID: New Voucher Type: Claim Claim Status: New Summary Basic Information								
	Extras Specific Travel Purpose:*								
	Delete Local Travel Claim not allowed at this time Begin Date:* Image: Claim List Local Travel Claim List End Date:* Image: Claim List								
	*Required								
	Save and Next Step Save								
	Enter the Specific Travel Purpose (i.e. Meetings in Silver Spring)								
	 Enter the Begin Date (i.e. Feb 5) Enter the End Date (i.e. Feb 7) 								
	Click Save and Next Step								
	Notes:								
	✓ Local Travel vouchers can only be done for a maximum of 60 days.								

Step		Action	
4	The Step 2: L	.ocal Travel Expenses screen appears:	
	2 Expenses	Step 2 : Local Travel Expenses 🕡 Traveler Name: SELENA JENKINS Local Claim ID: LT-0043300 Voucher Type: Claim Claim Status: Open	Voucher
		Basic Information has been successfully updated.	
	Other Actions Remarks Attachments Printable Local Voucher	Expense Information Agency Billed: 6.87 Amount: 6.87	
	View Claim History View Routing History	Order by: Date Sort Ascending Sort Descending Date Type Amount Description Pay	To Alerts Modify Copy Delete
	Extras Delete Claim Local Travel Claim List	07-Feb-2019 Voucher Transaction 6.87 Voucher Transaction Fee Ager	ncy Billed Showing 1 - 1 of 1
		Add New Expense	Attachment 🖲 Remark 🦰 Reduced 🗐
	1	Next Step Back to Step 1: Basic information	
5	2/9 - \$5.20 me 2/9 - \$10.30 m 2/9 - 16 miles ➤ Click Save ➤ Click Next	rking (8 hrs at "long term" parking @\$0.70/ etro parking (all day) oundtrip metro fare (\$5.15 one way smart t a roundtrip	
	Solutions TRAVELER'S	TRIPS TRAVELER'S PROFILE	SELENA JENKINS // HEATHER RIGGS 🗸
	Basic Information Second Sec	Step 3 : Local Travel Accounting Image: Claim Status: Open Volume raveler Name: SELENA JENKINS Local Claim ID: LT-0043300 Voucher Type: Claim Status: Open Volume No account codes selected. Click the 'Select Account Codes' link below to add an account code.	ucher
	Remarks Attachments Printable Local Voucher View Claim History	No account codes selected.	
	View Routing History Extras Delete Claim Local Travel Claim List	Save and Next Step Save Back to Step 2: Expenses	
	 Add an AC Click Save 	CCS Code e and Next Step	

Step		Action
6	The Step 4:	Local Travel Summary screen appears:
	1 Basic Information 2 Expenses	Step 4 : Local Travel Summary 🧉
	3 Accounting 3 Summary	Traveler Name: SELENA JENKINS Local Claim ID: LT-0043300 Voucher Type: Claim Claim Status: Open Voucher
	Other Actions Remarks	Accounting information has been saved successfully.
	Attachments	<u>collapse</u> or <u>expand</u> all sections
	Printable Local Voucher View Claim History View Routing History	Basic Information - Edit Details
	Extras Delete Claim Local Travel Claim List	Begin Date: 05-Feb-2019 End Date: 07-Feb-2019 Document Number: (System Assigned)
		Expenses - Edit Details
		Agency Billed: 6.87 Traveler: <u>54.74</u> Amount: 61.61
		Order by: Date • Sort Ascending Sort Descending Date Type Amount Description Pay To Alerts Show
7	 Add Any Click Ser 	wn and review all parts of the voucher summary Remarks & Receipts ad to Traveler A Action pop-up appears:
	Confirm Ac	tion
	Do you war	nt to proceed?
	Confi	Cancel
	Click Cor	nfirm
8	-	shboard now should have up at the top that the Local Travel been sent to the approver.
	📀 Local Vo	oucher LT-0043300 has been successfully sent to traveler.

Objectives:

Exercise #10: Copy Travel Authorization

- Copy a Basic Travel Authorization (TA)
 - Navigate each step of the TA

Instructions: Execute the following steps:

You have been asked to return to Chicago, IL to provide training on December 4-5, 2018. You will have a travel day on either side of the training. Your POV costs include a person taking you to the airport and picking you up. In this exercise you will copy from your previous Chicago TA. The TA needs to include the following costs:

Estimated Expenses

\$287.00 = Round-trip air fare
\$37.63 = Transaction Fee
50 miles one way to airport using private vehicle (POV)
\$400 for Rental Car
\$65 for Rental Car Gas
\$10/night for Parking at the hotel
\$25 for Parking at the airport for drop off and pick up
\$25/night for Hotel Tax
\$50 for Internet Fees
\$25/flight Checked Baggage Fees

Step	A	ction
1	From the My E2 screen: Click on <i>Trips</i> At a Glance Trips Local Travel Open Authorization Group Authorization	
	Start a Travel Document What would you like to do today? Make Reservations Go	Bulletins 20-Mar-2019: Once you access your E2 account for the first time, click Profile to view and <i>read more</i> 20-Mar-2019: Remember to always book a FedRooms hotel with your trip
	To Do List To Do List To Do List	Pending Approvals Local Travel and Misc. Claims LT-0043300 for \$61.61 for Meetings in Silver Spring from 05-Feb-2019 to 07-Feb-2019 is pending approval from JENKINS, SELENA Voucher 313198 for \$37.08 for Trip ID 313198 to Chicago, IL, United States from 22-Oct-2018 to 25-Oct-2018 is pending approval from JENKINS, SELENA Additional Notices Image: Comparison of the co

E2 Travel Basic

Step	Action
2	The Trips tab shows authorizations and vouchers all grouped under a trip number:
	Order by: Departure Date Sort Ascending Sort Descending
	Trip Id OA/GA# Destination Departure Date Purpose Approver Auth Voucher Advance Show Copy Trip Archive
	314003 Chicago, IL, United States 22-Oct-2018 Training in Chicago 🗸 🕐 Show Copy.
3	The Copy Trips screen appears Copy Trip: 314003
	Copy Trip Information
	New Trip Start Date:*
	*Required
	Copy
	 Enter Trip Start Date (i.e. Dec 3, 2018) Click Copy

Step		Action
4	The Step1: Bas	<i>ic Information</i> screen of the authorization appears:
	 Basic Information Reservation Site Details Expenses 	Step 1 : Basic Information 3 Traveler Name: SELENA JENKINS Trip ID: 314005 Authorization Status: New Authorization
	 5 Accounting 6 Travel Policy 	 Trip 314005 has been successfully copied from Trip 314003. Basic Information
	(7) <u>Summary</u> Other Actions Remarks	Type of Travel:* Mission (Operational) Specific Travel Purpose:* Training in Chicago Document Number: (System Assigned)
	Attachments Printable Authorization Compact Printable Authorization	*Required
	Daily Expenses Summary Trip History Add Non-Federal Sponsor	Save and Next Step
	Edit the Speed	<i>Travel</i> (i.e. Mission) cific Travel Purpose (i.e. Travel Training in Chicago - Teaching) nd Next Step
	Notes: ✓ The informa	ation will automatically populate based off the authorization you copied.

Step	Action
5	The Step 2: Reservation screen of the authorization appears:
	1 Basic Information Step 2 : Reservation ② 2 Reservation Image: Step 2 : Reservation ③ 3 Site Details Traveler Name: SELENA JENKINS Trip ID: 314005 Authorization Status: New Authorization 4 Expenses Sasic Information has been successfully updated. 5 Accounting Confirmation Number: 6 Travel Policy. Confirmation Number: 7 Summary. Make New Reservation Manage Trip Reservations Other Actions Next Step Remarks Next Step Attachments Basic Information
	Printable Authorization Compact Printable Click Next Step Notes: ✓ For training purposes we will be skipping this step.
6	The Step 3: Site Details screen of the authorization appears:
	1 Basic Information 2 Reservation 3 Site Details Traveler Name: SELENA JENKINS Trip ID: 314005 4 Expenses 5 Accounting (Site 1) Begin: Washington, DC, United States on 03-Dec-2018 to Chicago, IL, United States
	6 Travel Policy 7 Summary Departing Date:* 03-Dec-2018 Departing Time:* 08:00 AM Departing Time:* 08:00 AM Departing From: * Washington, DC, United States Remarks Going To:* Going To:* Chicago, IL, United States Printable Authorization Arrival Date:* Authorization Mode of Transportation:* Compact Printable Mode of Transportation:* Authorization Reason For Stop:* Trip History Add Site View Routing History Add Site
	 Edit/update any information Click Save and Next Step

			Action					
-	The Step 4: Expenses screen of the authorization appears:							
	Trip Dashboard Authorization							
	 Basic Information Reservation Site Details Expenses 		p ID: 314005 Authorization Status: New Authorization					
	5 Accounting	Site details information has been save	ed successfully.					
	6 Travel Policy	Expense Information						
	7 Summary Other Actions Remarks	Agency Billed: 53.14 Traveler: 1388.00 Unassigned: 0.00						
	Attachments	Amount: 1441.14						
	Printable Authorization	✓ Filter Options						
	Compact Printable Authorization	Order by: Date Sort Asce	ending Sort Descending					
	Daily Expenses Summary	Date Type	Amount Description	Pay To	Alerts	Modify Copy Delete		
	Trip History	03-Dec-2018 Business Center	50.00 Internet Fees	Traveler		Modify Copy Delete		
	Add Non-Federal Sponsor View Routing History	03-Dec-2018 Checked Bag Fee	50.00	Traveler		Modify Copy Delete		
	Travel Agent Assistance	03-Dec-2018 Fuel	65.00	Traveler		Modify Copy Delete		
		03-Dec-2018 Lodging	468.00 Lodging expense in Chicago, IL, United States including lodging taxes	Traveler		Modify		
	Extras		and using longing taxes	The second second				
		ify any informatio	on that needs to be chan		lodgin			
	Notes:							
		interne alter util autom		the transl	a uthan i	- dia a hara		
			atically change the dates from	i trie travel	autnori	zation base		
		dates added for the						
	✓ Verify :	system data, like loc	lging, has updated, if not, upo	late.				

Step			Action
8	The Step 5	: Accour	nting screen of the authorization appears:
U	Trip Dashboard	Authorization	
	 Basic Inform Reservation Site Details Expenses 	51	tep 5 : Accounting 🕝
	6 <u>Travel Polici</u>		No account codes selected. Click the 'Select Account Codes' link below to add an account code.
	7 <u>Summary</u>	× A	
	Other Actions Remarks		No account codes selected.
	Attachments Printable Authoriz	ation	ielect Account Codes
	Compact Printable Authorization Daily Expenses Sur		Save and Next Step Save Back to Step 4: Expenses
		ACCS Co ave and N	ode Next Step
9		: Travel I	Policy screen of the authorization appears:
	1 Basic Information 2 Reservation	-	SELENA JENKINS Trip ID: 314005 Authorization Status: New Authorization
	3 <u>Site Details</u> 4 <u>Expenses</u>		Items are incomplete: Air Cabin Class, and Rental Car Type.
	5 Accounting 6 Travel Policy	Accounting in	formation has been saved successfully.
	(7) Summary Other Actions	Travel Policy Just	collapse or expand all sections
	Remarks Attachments Printable Authorization Compact Printable	Policy Item Air Cabin Class	Information Explanation
	Authorization Daily Expenses Summary Trip History Add Non-Federal Sponsor	Rental Car Type *Required	
	View Routing History Travel Agent Assistance	Policy Item Lowest Logical	Information
	 Update 	anv <i>Trave</i>	el Policy Justifications
			Next Step

Step		Action				
10	The Step 7: Summary screen of the authorization appears:					
	Trip Dashboard Authorizati	lion				
	Basic Information Reservation Site Details	Step 7 : Summary 😨 Traveler Name: SELENA JENKINS Trip ID: 314005 Authorization Status: New Authorization				
	(4) Expenses	collapse or expand all se	ctions			
	5 Accounting 6 Travel Policy	Basic Information - <u>Edit Details</u>	^			
	Summary Other Actions	Type of Travel: Mission (Operational) Specific Travel Purpose: Training in Chicago - Teaching Document Number: (System Assigned)				
	Remarks Attachments	Reservation - Edit Details	•			
	Printable Authorization					
	Compact Printable Authorization Daily Expenses Summary	1 No reservations found.				
	Trip History	Site Details - Edit Details	~			
	Add Non-Federal Sponsor View Routing History Travel Agent Assistance	[Site 1] Begin: Washington, DC, United States on 03-Dec-2018 to Chicago, IL, United States				
	Extras	[Site 2] End: Chicago, IL, United States on 06-Dec-2018 to Washington, DC, United States	h			
	 Add Rem Add Attac Click Ser 					
11	The Confirm	Action pop-up will appear.				
	Confirm Action					
	Do you want to proceed?					
	Confirm Cancel					
	Click Cor	ntirm				
12	-	screen should appear with a message at the top stating the has been sent to the approver.				
	Authoriz	zation 313373 has been successfully sent to approver.				

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Exercise #11: Recall/Adjust Travel Authorization Allocate ACCS

Objectives:

- Recall a Travel Authorization (TA)
- Adjust the TA
- Allocate more than one ACCS

Instructions: Execute the following steps:

The Chicago trip you just forwarded to your routing list needs to be recalled as the office you're traveling for wants to add an additional ACCS in order to move some of the costs to that accounting.

Step			Action					
1	From the <i>My E2</i> screen:							
	 Click on 7 							
	At a Glance Trips Loca	al Travel Open Authorization Group Aut	horization					
	Start a Travel Docu	ment		Bulletins				
	What would you like to do to	oday? Make Reservations	Go	time, click Profi	9: Once you access le to view and <u>rea</u> 9: Remember to all	<u>d more</u>		
	To Do List			Pending Approvals Local Travel and Misc. Claims LT-0043300 for 561.61 for Meetings in Silver Spring from 05-Feb-2019 to 07-Feb-2019 is pending approval from JENKINS, SELENA Voucher 313198 for 537.08 for Trip ID 313198 to Chicago, IL, United States for 22-Oct-2018 to 25-Oct-2018 is pending approval from JENKINS, SELENA				
	No to do list items fo	ound.						
				Additional Notice	5			
				🚺 No additi	onal notices found.			
2	The Trips tal number:	b shows authoriz	ations and vouc	chers all g	grouped	under	a trip	,
	Order by: Departure Date 💌	Sort Ascending Sort Descending						
	Trip Id OA/GA# Destinat		Purpose	Approver Auth	Voucher Adv	vance Show	Copy Trip	Archive
		IL, United States 03-Dec-2018 IL, United States 22-Oct-2018	Training in Chicago - Teaching Training in Chicago	0	0	Show	Copy	
l					Revised (Showing 1	
	Click Sho	w for the docume	ent (i.e. Chicago	o trip - Te	aching)			

Step		Action
3	The Step 7: Summary screen ap	opears:
	1 Basic Information 2 Reservation 3 Site Details Traveler Name: SELENA JENKINS Trip ID: 3140	15 Authorization Status: Pending Authorization Approval
	4 Expenses 5 Accounting 6 Travel Policy	collapse or expand all sections
	Summary Type of Travel: Mission (Operational) Specific Travel Purpose: Training in Chicago - T Document Number: 19-00062-000X-A01 Attachments	aching.
	Printable Authorization Reservation - <u>View Details</u> Compact Printable Authorization Daily Expenses Summary Image: No reservations found.	^
	Trip History View Routing Path View Routing History Travel Agent Assistance	^
	[Site 1] Begin: Washington, DC, United States on 0 Extras Itips List [Site 2] End: Chicago, IL, United States on 06-Dec-	
	Scroll to the bottom of the scr	een
4	At the bottom of the Step 7: Sum	mary screen:
	Remarks	
	(i) No remarks found.	
	Receipts and Attachments - Edit Details	
	Attached Documents No receipts or attachments found.	
	Recall Back to Step 6: Travel Policy	
	Click Recall	
	Notes:	
	 As long as the final approval has back to make additional change 	s not been done, the preparer can pull the document s.

Step		Action	
5	The Confiri	<i>m Action</i> screen appears:	
	Confirm Action		
	Do you want to procee	rd?	
	Confirm	Cancel	
	Click Co	nfirm	
6		: Summary screen of the authoriz the document has been revised a	zation appears with a note at the top and recalled from the approver:
	-		
	Trip Dashboard Authoriza	tion	
	Basic Information Reservation	Step 7 : Summary 🥹	
	3 Site Details	Traveler Name: SELENA JENKINS Trip ID: 314005 Authorization Status: Revise	ed Authorization
	4 Expenses	Authorization revised: Document recalled from approver	
	5 Accounting 6 Travel Policy		collapse or expand all sections
	Summary	Basic Information - Edit Details	^
	Other Actions	Type of Travel: Mission (Operational)	
	Remarks	Specific Travel Purpose: Training in Chicago - Teaching	
	Attachments Printable Authorization	Document Number: 19-00062-XXXX-A01	
	Compact Printable Authorization	Reservation - Edit Details	~
	Daily Expenses Summary		
	Trip History Add Non-Federal Sponsor	1 No reservations found.	
	View Routing History Travel Agent Assistance	Site Details - <u>Edit Details</u>	•
	Extrac		
	Extras	[Site 1] Begin: Washington, DC, United States on 03-Dec-2018 to Chicago, IL, United St.	ates
	Click the	Accounting link	

Trip Dashboard Authorization							
1 Basic Information 2 Reservation 3 Site Details	Step 5 : Accounting 🕑 Traveler Name: SELENA JENKINS Trip ID: 314005 Authorization S	tatus: Revised Authorization					
(4) Expenses	Accounting	The second se					
Accounting Accounting Travel Policy	Description Account Code	Obligated Balance	Amount	Percent Allocated	Add to Favorites	Delete	
7 Summary	PY 19 - 51.0440000-000 2019-98-01-00-000 011-01-0006- ACCS1 02-in	\$0.00		100.00%	Add	Delete	
Other Actions Remarks	Pocodi Micini	Total: Remaining amount to be allocated:	\$1803.14 \$0.00 \$1803.14	100.00%			
Attachments Printable Authorization Compact Printable Authorization	Select Account Codes	Total claim amount:	\$1005.14				
Daily Expenses Summary Trip History Add Non-Federal Sponsor View Routing History Save Back to Step 4: Expenses							
Click th	e Select Account Codes link						

Step			A	ction						
8	-	code r	Dunting screen of the now associated to the				ears w	vith th	e second	
	Basic Information Reservation Site Details	Step 5 : /	Accounting 🕑 He: SELENAJENKINS Trip ID: 314005 Authorization St	atus: Revised Authorization						
	4 Expenses 5 Accounting		code(s) added to page.							
	6 Travel Policy 7 Summary	Accounting				Amount	Percent	Add to		
	Other Actions Remarks	FY 19 -	Account Code 51 0440000-000 2019-98-01-00-00-000 11-01-0006-	Obligated Balance		Allocated	Allocated	Favorites	Delete	
	Attachments	ACCS1 FY 19 - ACCS2	92: 51 0443000-000 2019-98-01-00-00-000 99-04-0000-	\$0.00		0.00	0.00%	Add	Delete	
	Printable Authorization Compact Printable Authorization Daily Expenses Summary Trip History	ALCSZ	90 _{-m}	Total: Remaining amount to be allocated: Total claim amount:		\$1803.14 \$0.00 \$1803.14	100.00%			
	Add Non-Federal Sponsor View Routing History Travel Agent Assistance	Select Acco Split Fundir								
	 Total Expe Expe Expe On the Accord 	Amou ense T ense T ense D ounting	ype Amount	e you can sp	olit			•		•
	or type in a percentage	perce needs	ntage. Either way, by to in total equal 100	splitting th	e	costs	that w	ay th		
	The next wa	•								
	Click the Sp	olit Fur	nding link							

			Action				
т	he Split funding po	p-up window	appears:				
	Split Funding For Travel Between	03-Dec-2018 and 06-Dec	-2018				
	Accounting Balances						^
	Account Code		Obligated Balance	Amount Allocated	Pay To Tr	/ Pay To	CBA
	<u>51 0440000-000 2019-98-01-00</u>		\$0.00	\$1803.14	\$1463.00		40.14
	<u>51 0443000-000 2019-98-01-00</u>	<u>-00-000 99-04-0000-00</u>	\$0.00	\$0.00	\$0.00		\$0.00
	Total		\$0.00	\$1803.14	\$1463.00) \$34	10.14
	Split Funding By Expense Type						
	Expense Type	Account Code			CBA Am	iount De	etail
	Business Center	00-000 2019-98-01-0	0-00-000 11-01-0006	-02-00-00-00 🔻	N	50.00 <u>De</u>	etail
	Expense Type	Account Code			CBA Am	ount De	etail
	Checked Bag Fee	00-000 2019-98-01-0	0-00-000 11-01-0006	-02-00-00-00 🔻	N	50.00 <u>De</u>	etail
	Expense Type	Account Code			CBA Am	ount De	etail
	Rental Car	00-000 2019-98-01-0	0-00-000 11-01-0006	.02.00.00.00 v		0.00 De	
	Heritar ear	100-000 2013-30-01-0				0.00	ciun
	Evnense Type	Account Code		02-00-00-00		ount D	etail
	Expense Type Airfare Common Carrier Save and Close Save	Account Code				ount De	
	Airfaro Common Carrior	Exit Window s	iplit By Expense Date	with a dro	v ə	/n ari	row wl
	Airfare Common Carrier Save and Close Save	Exit Window s	iplit By Expense Date	with a dro	v ə	/n arr CS cc	row wl
	Airfare Common Carrier Save and Close Save On this window the ex an select that full cos Split Funding By Expense Type	Exit Window s Exit Window s Exit Window s Exit for that exp	plit By Expense Date	with a dro	p-dow c ACC	/n arr CS cc	row wl
	Airfare Common Carrier Save and Close Save On this window the exan select that full cost Split Funding By Expense Type Expense Type Business Center Services	Exit Window stars	plit By Expense Date will appear ense type to	with a dro o a specifi	p-dow c ACC	/n arr CS cc	row wl ode.
	Airfare Common Carrier Save and Close Save On this window the exan select that full cost Split Funding By Expense Type Expense Type Business Center Services Expense Type	Exit Window s Exit Window s Exit Window s Exit Window s Account Code 3-B00 2018-0001-02	plit By Expense Date will appear ense type to 2-21-16-001 30-21- -16-001 30-31-0002-(- -16-001 30-31-0002-(-	with a dro o a specifi	p-dow c ACC	/n ari CS cc	row wi ode.

Step		Action		
10	The Split Fund	ing by Expense Type Detail	window appears:	
	Split Funding By Expense	Туре		
	Expense Type	Account Code	СВА	Amount Detail
	Business Center		Ν	50.00 <u>Clear</u> <u>Detail</u>
	Account Code			Amount
	51 0440000-000 2019- 00-00-00	98-01-00-00-000 11-01-0006-02-		0.00
	51 0443000-000 2019- 00-00-00	98-01-00-00-000 99-04-0000-00-		0.00
	Expense Type. total of the expe save at the end	enter specific amounts to eac Just be aware you'll need to e nse type. You can either save of all expenses. If you're don Close , otherwise click Exit W screen.	enter so all the amo e every time you ma e adding all the exp	unts equal the ake a change or penses, you can

Step			Action				
11	The Split Funding pop	-up window wi	ll appear:				
	Split Funding For Travel Between 0	4-Dec-2017 and 07-Dec-20	17				Ø
	Accounting Balances					~	A
	Account Code	C	Obligated Balance An	nount Allocated	Pay To Trv Pay	/ To CBA	
	14 28LEF28-B00 2018-0001-02-2	-16-001 30-21-0002-0	\$0.00	\$1454.17	\$1406.00	\$48.17	
	14 28LEF29-P00 2018-0001-02-21	-16-001 30-31-0002-0	\$0.00	\$0.00	\$0.00	\$0.00	=
	Total		\$0.00	\$1454.17	\$1406.00	\$48.17	
	Split Funding By Expense Type						
	Expense Type	Account Code		с	BA Amount	Detail	
	Business Center Services	3-B00 2018-0001-02-21-	16-001 30-21-0002-00	0-00-00 🔻	N 50.00	<u>Detail</u>	
	Expense Type	Account Code		с	BA Amount	Detail	
	Checked Baggage Fee	}-B00 2018-0001-02-21-16-001 30-21-0002-00-00-00 V			N 50.00	Detail	
	Expense Type	Account Code		c	BA Amount	Detail	
	Rental Car - Commercial Car Rental	3-B00 2018-0001-02-21-	16-001 30-21-0002-0	0-00-00-00	N 350.00	<u>Detail</u>	
	Expense Type	Account Code		с	BA Amount	Detail	~
	Save and Close Save	Exit Window Split B	y Expense Date				
	If you want to split the Subject to the Availab Click the Split By E	ility of Funds (SAF).	which is	the easy	/ way t	o do it f

Step	Action
12	The Split Funding by Expense Date pop-up window will appear:
	Split Funding For Travel Between 03-Dec-2018 and 06-Dec-2018 Split Funding By Expense Date
	Expense Beginning: 03-Dec-2018 Expense Ending: 06-Dec-2018 Account Code: 100-000 2019-98-01-00-000 011-01-0006-02-00-00 • Add Split Funding
	From To Account Code Amount Delete Image: Image Delete Dele
	Save and Close Save Exit Window Split By Expense Type
	This way allows you to pick the dates and select the ACCS Code for that date range. You'll have to make sure to do for each date range. You'll receive an error if you don't. When you change your dates and account code, click the <i>Add Split Funding</i> button. When finished entering the split funding you can click <i>Save and Close.</i> If you don't want to do anything on this screen click <i>Exit Window</i> .

		A	Action					
The Step 5: Accounting screen appears:								
Basic Information Reservation Sin D = 1		Accounting 🕑	Status: Revised Authorization					
3 Site Details 4 Expenses		nt code(s) added to page.						
Accounting Accounting Travel Policy	Accounting							
7 Summary	Description	n Account Code	Obligated Balance	Amount	Percent	Add to	Delete	
Other Actions Remarks	FY 19 -	51 0440000-000 2019-98-01-00-00-000 11-01-0006-	\$0.00 \$	Allocated 1803.14	Allocated	Favorites Add	Delete	
Attachments Printable Authorization	ACCS1 FY 19 - ACCS2	02 51.0443000-000.2019-98-01-00-00-000.99-04-0000- 00	\$0.00 \$	0.00	0.00%	Add	Delete	
Compact Printable Authorization Daily Expenses Summary			Total: Remaining amount to be allocated:	\$1803.14 \$0.00 \$1803.14	100.00%			
Trip History Add Non-Federal Sponsor View Routing History		ount Codes	Total claim amount:					
Travel Agent Assistance	Split Fund	ing						
		know the ways to allo s.	cate: Allocate	the fu	unding	acro	ss th	
So now tha	codes	5.	cate: Allocate	the fu	unding	acro	ss th	
So now that accounting Trip Dashboard Authoriz 1 Basic Information 2 Reservation 3 Site Details	codes ation Step 5 :	•		the fu	unding	acro	ss th	
So now that accounting Trip Dashboard Authoriz 1 Basic Information 2 Reservation	ation Step 5 : Traveler Na	Accounting 📦		the fu	unding	acro	ss th	
So now that accounting	ation Step 5 : Traveler Na	Accounting v ime: SELENAJENKINS Trip ID: 314005 Authorization nds successfully saved.		the fu	unding	acro	ss th	
So now that accounting	ation Step 5 : Traveler Na Split Fu Accounting	Accounting v ime: SELENAJENKINS Trip ID: 314005 Authorization nds successfully saved.		Amount	Percent	Add to	Delete	
So now that accounting	ation Step 5 : Traveler Na Split Fu Accounting	Accounting me: SELENAJENKINS Trip ID: 314005 Authorization ands successfully saved.	n Status: Revised Authorization			Add to	Delete	
So now that accounting	ation Step 5 : Traveler Na Split Fu Accounting Descriptio FY 19-	Accounting me: SELENA JENKINS Trip ID: 314005 Authorization inds successfully saved. n Account Code 51 0440000-000 2019-98-01-00-00 000 11-01-0006-	o Status: Revised Authorization Obligated Balance	Amount Allocated	Percent Allocated	Add to Favorites Add	Delete	
So now that accounting	ation Step 5 : Traveler Na Split Fu Accounting Descriptio FY 19-	Accounting me: SELENAJENKINS Trip ID: 314005 Authorization mds successfully saved. Account Code S1 0440000-000 2019-98-01-00-00-000 11-01-0006- 02 S1 0440000-000 2019-98-01-00-00-000 99-04-0000-	n Status: Revised Authorization Obligated Balance 50.00	Amount Allocated \$1069.14	Percent Allocated 59.29%	Add to Favorites Add	Delete Delete	

			Action				
The Step 6: Travel Policy screen appears:							
Solutions TRAVEL	ER'S TRIPS TRAVELER'S PROFILE			SELENA JENKINS // HEATHER RIGGS -			
Trip Dashboard Authorization							
1 Basic Information Step 6 : Travel Policy 🤪							
2 Reservation	Step 6 : Travel Policy	0					
3 Site Details	Traveler Name: SELENA JENKINS	Trip ID: 314005 Author	ization Status: Revised Authorization				
(4) Expenses	Accounting information has been	n saved successfully.					
(5) Accounting	•						
6 Travel Policy				collapse or expand all sections			
(7) Summary	Travel Policy Justifications			^			
Other Actions	Policy Item	Information	Explanation				
Remarks	Air Cabin Class	Coach	Within policy				
Attachments	Rental Car Type	Compact	Within policy				
Printable Authorization Compact Printable		compact	summing bound.				
Authorization	*Required						
Daily Expenses Summary Trip History	Travel Policy Warnings						
Add Non-Federal Sponsor							
	Policy Item		formation				
View Routing History		N	o commercial air reservation.				
View Routing History Travel Agent Assistance	Lowest Logical Airfare						
Travel Agent Assistance	Lowest Logical Airfare Lowest Compact Car	Step	ars:				
Travel Agent Assistance	Lowest Compact Car	Step					
Click Sa Click The Step 7.	Lowest Compact Car	S <i>tep</i> reen appe					
Trivel Agent Assistance Click Sa Click Sa The Step 7. Trip Dashboard Authoriz 1 Basic Information 2 Reservation	Lowest Compact Car	S <i>tep</i> reen appe	ars:				
Trivel Agent Assistance Click Sa Click Sa The Step 7. Trip Dashboard Authoriz 1 Basic Information 2 Reservation 3 Site Details	Lowest Compact Car	S <i>tep</i> reen appe					
Trivel Agent Assistance Click Sa Click Sa The Step 7. Trip Dashboard Authoriz 1 Basic Information 2 Reservation 3 Site Details 4 Expenses	Lowest Compact Car	Step reen appe	ars:				
Travel Agent Assistance Extras Click Sa The Step 7. Trip Dashboard Authoriz 1 Basic Information 2 Reservation 3 Site Details 4 Expenses 5 Accounting	Lowest Compact Car ve and Next S Summary SC ation Step 7 : Summary @ Traveler Name: SELENA JENKINS	Step reen appe	ars:	collapse or expand all sect			
Trivel Agent Assistance Click Sa Click Sa The Step 7. Trip Dashboard Authoriz 1 Basic Information 2 Reservation 3 Site Details 4 Expenses	Lowest Compact Car Ve and Next S Summary SC ation Step 7 : Summary @ Traveler Name: SELENA JENKINS Authorization revised: Docum	Step reen appe	ars:	collapse or expand all sect			
Travel Agent Assistance Extras Click Sa The Step 7. Trip Dashboard Authoriz 1 Basic Information 2 Reservation 3 Site Details 4 Expenses 5 Accounting 6 Travel Policy	Lowest Compact Car ve and Next S Summary SC ation Step 7 : Summary @ Traveler Name: SELENA JENKINS	Step reen appe	ars:	collapse or expand all secti			
Travel Agent Assistance Extras Click Sa Click Sa The Step 7. Trip Dashboard Authoriz 1 Basic Information 2 Reservation 3 Site Details 4 Expenses 5 Accounting 6 Travel Policy 7 Summary Other Actions	Lowest Compact Car Ve and Next S Summary SC ation Step 7 : Summary @ Traveler Name: SELENA JENKINS Authorization revised: Docum Basic Information - Edit Details Type of Travel: Missie	Step reen appe Trip ID: 314005 Aut ent recalled from approver	ars:	collapse or expand all secti			
Travel Agent Assistance Extras Click Sa Click Sa The Step 7. Trip Dashboard Authoriz 1 Basic Information 2 Reservation 3 Site Details 4 Expenses 5 Accounting 6 Travel Policy 7 Summary Other Actions Remarks	Lowest Compact Car ve and Next S Summary SC stion Step 7 : Summary @ Traveler Name: SELENA JENKINS Authorization revised: Docum Basic Information - Edit Details Type of Travel: Missis Specific Travel Purpose: Traini	Step reen appe Trip ID: 314005 Aut ent recalled from approver on (Operational) ing in Chicago - Teaching	ars:	collapse or expand all secti			
Travel Agent Assistance Extras Click Sa Click Sa The Step 7. Trip Dashboard Authoriz 1 Basic Information 2 Reservation 3 Site Details 4 Expenses 5 Accounting 6 Travel Policy 7 Summary Other Actions	Lowest Compact Car Ve and Next S Summary SC ation Step 7 : Summary @ Traveler Name: SELENA JENKINS Authorization revised: Docum Basic Information - Edit Details Type of Travel: Missie	Step reen appe Trip ID: 314005 Aut ent recalled from approver on (Operational) ing in Chicago - Teaching	ars:	collapse or expand all secti			
Travel Agent Assistance Click Sa Click Sa Click Sa The Step 7, Trip Dashboard Authoriz Authoriz Authoriz Authoriz Cher Actions Remarks Attachments Printable Authorization Compact Printable	Lowest Compact Car ve and Next S Summary SC ation Step 7 : Summary @ Traveler Name: SELENA JENKINS Authorization revised: Docum Basic Information - Edit Details Type of Travel: Missis Specific Travel Purpose: Traini Document Number: 19-00	Step reen appe Trip ID: 314005 Aut ent recalled from approver on (Operational) ing in Chicago - Teaching	ars:	collapse or expand all sect			
Travel Agent Assistance Extras Click Sa Click Sa The Step 7. Trip Dashboard Authoriz 1 Basic Information 2 Reservation 3 Site Details 4 Expenses 5 Accounting 6 Travel Policy 7 Summary Other Actions Remarks Attachments Printable Authorization Compact Printable	Lowest Compact Car ve and Next S Summary SC stion Step 7 : Summary @ Traveler Name: SELENA JENKINS Authorization revised: Docum Basic Information - Edit Details Type of Travel: Missis Specific Travel Purpose: Traini	Step reen appe Trip ID: 314005 Aut ent recalled from approver on (Operational) ing in Chicago - Teaching	ars:	collapse or expand all secti			
Travel Agent Assistance Extras Click Sa Click Sa The Step 7. Trip Dashboard Authoriz 1 Basic Information 2 Reservation 3 Site Details 4 Expenses 5 Accounting 6 Travel Policy 7 Summary Other Actions Remarks Attachments Printable Authorization Compact Printable Authorization Daily Expenses Summary	Lowest Compact Car ve and Next S Summary SC ation Step 7 : Summary @ Traveler Name: SELENA JENKINS Authorization revised: Docum Basic Information - Edit Details Type of Travel: Missis Specific Travel Purpose: Traini Document Number: 19-00 Reservation - Edit Details	Step reen appe Trip ID: 314005 Aut ent recalled from approver on (Operational) ing in Chicago - Teaching	ars:	collapse or expand all sect			
Travel Agent Assistance Extras Click Sa The Step 7. Trip Dashboard Authoriz 1 Basic Information 2 Reservation 3 Site Details 4 Expenses 5 Accounting 6 Travel Policy 7 Summary Other Actions Remarks Attachments Printable Authorization Compact Printable	Lowest Compact Car ve and Next S Summary SC ation Step 7 : Summary @ Traveler Name: SELENA JENKINS Authorization revised: Docum Basic Information - Edit Details Type of Travel: Missis Specific Travel Purpose: Traini Document Number: 19-00	Step reen appe Trip ID: 314005 Aut ent recalled from approver on (Operational) ing in Chicago - Teaching	ars:	collapse or expand all section			
Travel Agent Assistance Trip Dashboard Click Sa Trip Dashboard Authoriz Basic Information Caservation Sinc Details Expenses Atachments Printable Authorization Compact Printable Authorization Compact Printable Authorization Compact Printable Authorization Daily Expenses Summary Trip History Add Non-Federal Sponsor View Routing History	Lowest Compact Car ve and Next S Summary SC ation Step 7 : Summary @ Traveler Name: SELENA JENKINS Authorization revised: Docum Basic Information - Edit Details Type of Travel: Missic Specific Travel Purpose: Traini Document Number: 19-00 Reservation - Edit Details No reservations found.	Step reen appe Trip ID: 314005 Aut ent recalled from approver on (Operational) ing in Chicago - Teaching	ars:	collapse or expand all section			
Travel Agent Assistance Extras Click Sa Click Sa The Step 7, Trip Dashboard Authoriz Authoriz Authoriz	Lowest Compact Car ve and Next S Summary SC ation Step 7 : Summary @ Traveler Name: SELENA JENKINS Authorization revised: Docum Basic Information - Edit Details Type of Travel: Missis Specific Travel Purpose: Traini Document Number: 19-00 Reservation - Edit Details	Step reen appe Trip ID: 314005 Aut ent recalled from approver on (Operational) ing in Chicago - Teaching	ars:	collapse or expand all sections			

Step	Action
16	The Remarks pop-up window appears:
	 Click on the Add Remarks tab Add a remark about why the change was needed Click Save and Close
17	The Step 7: Summary screen appears with the remarks showing:
	Click Send to Approver
20	The Confirm Action pop-up window appears:
	Confirm Action
	Do you want to proceed?
	Confirm Cancel
	 Click Confirm
21	The My E2 screen appears with a note at the top that it's been successfully sent to the approver.

Objectives:

Notes:

Exercise #12: Create TA Where Duty Station Not in Per Diem Table

• Create a Basic Travel Authorization (TA)

- Navigate each step of the TA
- Understand the steps when a location is not in the per diem table

For domestic locations inside the continental United States (CONUS):

- 1. Check to see if the TDY location(s) is listed by GSA as a key city;
- 2. If it is not listed as a key city, check to see if the county for the TDY location(s) is listed;
- 3. If neither the city nor county are listed, you need to select the standard per diem rate and then enter the location manually.

To look up counties for domestic locations, use <u>www.naco.org</u>

FedRooms should always be the first choice for CONUS locations.

For foreign locations or U.S. locations outside of the continental United States (CONUS), i.e., Alaska, Hawaii, Northern Mariana Islands, etc:

- 1. Check to see if the TDY location is listed by the Department of State (Foreign) or the Department of Defense (OCONUS);
- 2. If the TDY location is not listed, you would select "**OTHER**" per diem rate assigned and then enter the location manually.

Remember, if there are no hotels to sleep in the area you are going to, you must indicate on the TA where you are staying for per diem purposes.

Instructions: Execute the following steps:

You have been instructed to do a site visit to Stennis Space Center, MS from April 23-25, 2019. You'll be arriving at New Orleans, LA and renting a car. You'll have a day before and after the trip and you'll be parking your car at the airport while you're on travel. Because Stennis has no hotels in the area, remember to change your site details to the area where you'll be staying. You may have to do research outside of the system using naco.org or google maps prior to entering anything in the E2 Travel System.

Estimated Expenses

\$854.39 = Round-trip air fare
\$9.35 = Transaction Fee
50 miles one way to airport using private vehicle (POV) (x2)
\$15/day for Parking at the Airport
\$400 for Rental Car
\$65 for Rental Car Gas
\$15/day for Parking at the hotel
\$25/day for Hotel Tax
\$25/flight Checked Baggage Fees

Step	Action
1	From the <i>My E2</i> screen:
	 Click the drop-down arrow on the "What would you like to do today?" field Select Create an Authorization Click Go
	Solutions MY E2 MY APPROVALS TRAVEL FOR OTHERS REPORTS
	At a Glance Trips Local Travel Open Authorization Group Authorization
	Start a Travel Document
	What would you like to do today? Make Reservations Make Reservations Show Held Reservations
	To Do List Create an Authorization Create Local Travel Claim Create Open Authorization Create Group Authorization
	Get started by selecting a QUICK LINKS to shop for a reservation, create a new travel authorization, or other travel documents.
	Notes:
	 In production, if you did not have a reservation set up, you would click Make Reservation In production, if you called the TMC, you would create your authorization and then
	 associate the reservation to the authorization. ✓ In production, if you had made your own reservation, but didn't create an authorization at the time of the reservation, you can still add it by going to held reservations and then create the authorization.
	 For Training Purposes we will not be working with the Online Reservation System or reservations

Step		Action
2	The Step1: Basi	c Information screen of the authorization appears:
		ELER'S TRIPS TRAVELER'S PROFILE
	 Basic Information Reservation 	Step 1 : Basic Information 🥹
	3 Site Details	Traveler Name: SELENA JENKINS Trip ID: New Authorization Status: New
	(4) Expenses	Basic Information
	5 Accounting	
	6 Travel Policy	Type of Travel:* Select Type of Travel Specific Travel Purpose:*
	7 Summary	Document Number: (System Assigned)
	Extras	
	Trips List	*Required
	Delete Authorization not allowed at this time	
	Printable Profile	Save and Next Step Save
		pe of <i>Travel</i> (i.e. Mission) ecific Travel Purpose (i.e. Site Visit to Stennis Space Center) ad Next Step
	Notes:	
		itions travel system generates a Document Number for the Authorization. Itions travel system generates a Trip Number that groups all travel
	documents	
		mber is the number that keeps the authorization and vouchers together and ed to query for information.

Step	Action
3	The Step 2: Reservation screen of the authorization appears:
	Trip Dashboard Authorization
	1 Basic Information Step 2 : Reservation 2 Reservation 3 Site Details 3 Site Details Traveler Name: SELENA JENKINS Trip ID: 314062 Authorization Status: New Authorization
	 (4) Expenses (5) Accounting (6) Basic Information has been successfully updated.
	6 Travel Policy Confirmation Number: 7 Summary Make New Reservation Manage Trip Reservations Other Actions Other Actions
	Remarks Next Step Back to Step 1: Basic Information Attachments Daily Expenses Summary
	Click Next Step
	 Notes: ✓ For training purposes we will be skipping this step. ✓ In Production, this is the step you would be using if you had made a reservation outside of the system and needed to associate it to the authorization by using Manage Trip Reservations. ✓ If you had a reservation already associated, this is the screen you'd go to in order to view/change your reservation.

Step	Action
4	The Step 3: Site Details screen of the authorization appears:
	1 Basic Information 2 Reservation 3 Site Details Traveler Name: SELENA JENKINS 4 Expenses collapse or expand all sections
	4 Expenses collapse or expand all sections 5 Accounting [Site 1] Begin: Washington, DC, United States 6 Travel Policy
	 Travel Agent Assistance Select the Departing Date (i.e. April 22) Select the Departing Time (i.e. defaults to morning) Change the Departing From if needed (i.e. defaults to your profile location) Enter the Going To (i.e. Slidell) Select the Returning Date (i.e. April 26) Select the Arrival Time Click Save and Next Step
	 Notes: ✓ For training purposes we will be entering information into this section. ✓ If there is a reservation associated to the authorization this information will automatically fill out based off the reservation, but it should still be looked at to make sure all information is correct for per diem purposes. ✓ If changes occur to reservations, this screen is not automatically updated.

Step			Action			
5	The Step 4 :	-	en of the authorization a	ppears:		
	1 Basic Information	Step 4 : Expenses 💡				
	2 Reservation 3 Site Details		D: 314062 Authorization Status: New Authorization			
	 4 Expenses 5 Accounting 	Site details information has been saved	I successfully.			
	6 Travel Policy 7 Summary	Expense Information				
	Other Actions Remarks	Agency Billed: 15.51 Traveler: 623.50 Unassigned: 0.00 Amount: 639.01				
	Attachments Printable Authorization	✓ Filter Options				
	Compact Printable Authorization	Order by: Date Sort Ascend	ding Sort Descending			
	Daily Expenses Summary Trip History	Date Type	Amount Description	Рау То	Alerts Modify Copy Delete	
	Add Non-Federal Sponsor View Routing History	22-Apr-2019 Lodging	376.00 Lodging expense in Slidell, LA, United States including lodging taxes	Traveler	Modify	
	Travel Agent Assistance	22-Apr-2019 Meals and Incidentals 26-Apr-2019 Voucher Transaction	247.50 M&IE expense in Slidell, LA, United States	Traveler	Modify	
	Extras	Fee	15.51 YOUCHER TRAISACTION PRE	Agency Billed	Showing 1 - 3 of 3	
	\$854.39 = R \$9.35 = Trar 50 miles one \$15/day for I \$400 for Ren \$65 for Rent \$15/day for I \$25/night for \$25/flight Ch	Parking at the Air ntal Car tal Car Gas Parking at the ho	sing private vehicle (PO rport tel	V) (x2)		
	the loc ✓ If you i the tra ✓ The sy	ations in your site de had a reservation tie nsportation costs (i.e vstem will automatica	ally populate your Lodging ar etails. ed to the authorization the sys e. airfare, TMC fee and renta ally put an expense cost for a ly charged until you file the vo	stem will au I car) 1 Voucher T	tomatically popul	late
6	expenses:	expenses have b	en of the authorization a	ppears wi	ith the updated	k

Step			Ac	tion		
7	The Step 5 :	Accounting so	creen of the	authorization ap	pears:	
-						
	Trip Dashboard Autho	rization				
	1 Basic Information	Step 5 : Accountin	g 😧			
	2 Reservation 3 Site Details	Traveler Name: SELENA JEN	KINS Trip ID: 314062	Authorization Status: New Authoriza	ition	
	(4) Expenses	No account codes selecte	d. Click the 'Select Account	Codes' link below to add an account cod	e.	
	Accounting Accounting Travel Policy					
	7 Summary	Accounting				
	Other Actions	No account codes se	lected.			
	Remarks	Select Account Codes				
	Attachments Printable Authorization					
	Compact Printable Authorization	Save and Next Step	Save Back to	Step 4: Expenses		
	Daily Expenses Summary Trip History					
	Click the	Select Account	Codes link			
	Add an A	CCS Code				
	Click Sel	lect and Close				
		ve and Next Ste	20			
8	The Sten 6.	Travel Policy	creen of th	e authorization ap	nears.	
0		-			spoulo.	
	Trip Dashboard Authorizat	lion				
	Basic Information Reservation	Step 6 : Travel Policy 🌚				
	3 Site Details	Traveler Name: SELENA JENKINS T	rip ID: 314062 Authorizati	on Status: New Authorization		
	4 Expenses 5 Accounting	A These policy items are incomplete:	Air Cabin Class, and Rental Car	Туре.		
	5 Travel Policy 7 Summary	Accounting information has been seen seen seen seen seen seen see	aved successfully.			
	() Summary				collapse or	expand all sections
	Other Actions Remarks	Travel Policy Justifications				^
	Attachments	Policy Item	Information	Explanation		
	Printable Authorization Compact Printable	Air Cabin Class	Select one	•		
	Authorization Daily Expenses Summary	Rental Car Type	Select one			
	Trip History	*Required				
	Add Non-Federal Sponsor	Travel Policy Warnings				~
	View Routing History Travel Agent Assistance					
		Policy Item	Inform			
	Fytras	Lowest Logical Airfare	No co	mmercial air reservation.		
	Select jus	stifications if nee	eded			
		ve and Next Ste				
			~ ~ ~			

Step	Action	
9	The Step 7: Summary screen of the authorization appears:	
10	<complex-block></complex-block>	
11	The My E2 screen should appear with a message at the top stating the authorization has been sent to the approver.	

Objectives:

Exercise #13: Create TA Incorporating Leave at the End of the Trip

• Create a Basic Travel Authorization (TA)

- Navigate each step of the TA
- Understand the steps to incorporate leave at the end of a TDY Trip

Notes:

This exercise covers how to incorporate annual leave or non-duty days in conjunction with official travel. No lodging and M&IE allowances are paid on days when annual/non-duty leave exceeds 4 hours.

Commerce Travel Handbook

3.4.1 - General Rules (Leave Status) 3.8.1.4 - Authority to Use (rental car in conjunction with leave) 3.13.8 Travel in Conjunction with Leave

NOAA Travel Regulations

Chapter 2 - Travel Authorizations - Section 7 - Leave Chapter 6 - Airfare, Section 5 - CBA Exceptions, Section 6 - Personal Travel

Instructions: Execute the following steps:

You are going to a site visit in Boulder, CO on November 13-15, 2018. You will have a travel day on either side. You have decided to take a leave at the end of the trip and travel back on the 18th. Your authorization will need to include the following costs:

Estimated Expenses

\$550.40 = Round-trip air fare
\$9.12 = Transaction Fee
50 miles one way to airport using private vehicle (POV) (x2)
\$10/day for Parking at the Airport
\$400 for Rental Car
\$80 for Rental Car Gas
\$15/day for Parking at the hotel
\$25/night for Hotel Tax
\$25/flight Checked Baggage Fees

Step	Action										
1	From the <i>My E2</i> screen:										
	 Click the drop-down arrow on the "What would you like to do today?" field Select Create an Authorization Click Go 										
	Solutions MY E2 MY APPROVALS TRAVEL FOR OTHERS REPORTS										
	At a Glance Trips Local Travel Open Authorization Group Authorization										
	Start a Travel Document										
	What would you like to do today? Make Reservations Make Reservations Show Held Reservations										
	Create an Authorization To Do List Create Local Travel Claim Create Open Authorization Create Group Authorization										
	Get started by selecting a QUICK LINKS to shop for a reservation, create a new travel authorization, or other travel documents.										
	Notes:										
	 ✓ In production, if you did not have a reservation set up, you would click Make Reservation ✓ In production, if you called the TMC, you would create your authorization and then associate the reservation to the authorization. 										
	 ✓ In production, if you had made your own reservation, but didn't create an authorization at the time of the reservation, you can still add it by going to held reservations and then create the authorization. 										
	 ✓ For Training Purposes we will not be working with the Online Reservation System or reservations 										

Step		Action							
2	The Step1: Basi	c Information screen of the authorization appears:							
	 Basic Information Reservation 	Step 1 : Basic Information 🥑							
	3 Site Details	Traveler Name: SELENA JENKINS Trip ID: New Authorization Status: New							
	(4) Expenses	Basic Information							
	(5) Accounting(6) Travel Policy	Type of Travel:* Select Type of Travel							
	7 Summary	Specific Travel Purpose:*							
		Document Number: (System Assigned)							
	Extras Trips List	*Required							
	Delete Authorization not allowed at this time								
	Printable Profile	Save and Next Step Save							
	Select the Type	pe of Travel (i.e. Mission)							
		cific Travel Purpose (i.e. Site Visit to Boulder CO)							
	 Click Save and Next Step 								
	Notes:								
		tions travel system generates a Document Number for the Authorization. tions travel system generates a Trip Number that groups all travel							
	documents t								
		mber is the number that keeps the authorization and vouchers together and ed to query for information.							
3	The Step 2: Res	ervation screen of the authorization appears:							
	Trip Dashboard Authorizatio								
	1 Basic Information	Step 2 - Decomposition							
	2 Reservation	Step 2 : Reservation 🤪							
	 <u>3 Site Details</u> <u>4 Expenses</u> 	Traveler Name: SELENA JENKINS Trip ID: 314092 Authorization Status: New Authorization							
	4 Expenses5 Accounting	Basic Information has been successfully updated.							
	6 <u>Travel Policy</u>	Confirmation Number:							
	7 <u>Summary</u>	Make New Reservation Manage Trip Reservations							
	Other Actions								
	Remarks Attachments	Next Step Back to Step 1: Basic Information							
	Daily Expenses Summary								
	Click Next Ste	ep							

Step		Action							
	 ✓ In Pro of the Reser ✓ If you 	r training purposes we will be skipping this step. Production, this is the step you would be using if you had made a reservation outside he system and needed to associate it to the authorization by using Manage Trip servations. ou had a reservation already associated, this is the screen you'd go to in order to w/change your reservation.							
4	Trip Dashboard 1 Basic Information 2 Reservation 3 Site Details 4 Expenses 5 Accounting 6 Travel Policy 7 Summary Other Actions Remarks Attachments Daily Expenses Summary Trip History Travel Agent Assistance Extras Trips List Create Trip Template Colors Authorization Select the Select t	<pre>s. Site Details screen of the authorization appears: style="background-color: blackground-color: black</pre>							
	✓ If ther fill out inform	aining purposes we will be entering information into this section. e is a reservation associated to the authorization this information will automatically t based off the reservation, but it should still be looked at to make sure all nation is correct for per diem purposes. nges occur to reservations, this screen is not automatically updated.	/						

Step			Action			
5a	The Step 4 :	Expenses so	creen of the authorization	appears:		
	Trip Dashboard Authorizati	ion				
	 Basic Information Reservation Site Details Expenses 	Step 4 : Expenses @ Traveler Name: SELENA JENKIN				
	5 Accounting 6 Travel Policy 7 Summary Other Actions Remarks Attachments Printable Authorization Compact Printable Authorization Daily Expenses Summary Trip History Add Non-Federal Sponsor View Routing History Travel Agent Assistance	Expense Information Agency Billed: 15.51 Traveler: 1215.00 Unassigned: 0.00 Amount: 1230.51 Filter Options Order by: Date S Date Type 12-Nov-2018 Lodging 12-Nov-2018 Makis and Incide 18-Nov-2018 Voucher Transar Fee		Pay To Traveler Traveler Agency Billed	Alerts	Modify Copy Delete Modify Modify
	Incidentals w		en at the end of the trip, tl e modified to show the lea ck <i>Modify</i>) or th	the Meals and

	dging Expenses	K.										
	✔ Filter Optic	ons 🗸 🗸 Apj	oly to All D	oisplayed Expenses								
	Lodging Site: B	oulder, CO, Uni	ted States									
	Order by: Da	ite	•	Sort Ascending	Sort Descend	ing						
	Date	Reimbursem	ent Type	Per Diem Rate	Amount	Allowed	Estimated Tax	Pay To	Day Off	Shared	Notes	Alerts
	12-Nov-2018	Per Diem	•	131.00	131.00	131.00	0.00	Traveler •				
	13-Nov-2018	Per Diem	•	131.00	131.00	131.00	0.00	Traveler •		0		
	14-Nov-2018	Per Diem	•	131.00	131.00	131.00	0.00	Traveler •	0	8		
	15-Nov-2018	Per Diem	•	131.00	131.00	131.00	0.00	Traveler •				
	16-Nov-2018	Per Diem		131.00	131.00	131.00	0.00	Traveler •				
	17-Nov-2018	Per Diem	•	131.00	131.00	131.00	0.00	Traveler •				
	18-Nov-2018	Per Diem		131.00	0.00	0.00	0.00			No		
				Running Totals:	786.00	786.00	0.00					
			Total	stimated Lodging:	786.00							
	Save and Cl	ose Sav	e E	xit Window								
Po	001100	the Sit		toile bod	to inclu	ido ti		o dovo	thou	oro		rronth
				tails had								
				ar days o								
COS	sts. Ho	wever	, bec	cause lea	ive is b	eing	taken fo	or the v	veek	end,	this	s will ı
	notate	d here.	_			-						
be			-									
be												

Codging expenses have been updated successfully.												
		ons 🖌 🖌 App	oly to All I.	Displayed Expenses								
	Lodging Site: B	oulder, CO, Unit	ed States									
	Order by: Da	te	•	Sort Ascending	Sort Descend	ng						
	Date	Reimbursem	ent Type	Per Diem Rate	Amount	Allowed	Estimated Tax	Pay To	Day Off	Shared	Notes	Alerts
	12-Nov-2018	Per Diem	•	131.00	131.00	131.00	0.00	Traveler •				
	13-Nov-2018	Per Diem	•	131.00	131.00	131.00	0.00	Traveler •				
	14-Nov-2018	Per Diem	•	131.00	131.00	131.00	0.00	Traveler •				
	15-Nov-2018	Per Diem		131.00	131.00	131.00	0.00	Traveler •				
	16-Nov-2018	Per Diem		131.00	0.00	0.00	0.00			No		
	17-Nov-2018	Per Diem		131.00	0.00	0.00	0.00			No		
	18-Nov-2018	Per Diem		131.00	0.00	0.00	0.00			No		
				Running Totals:	524.00	524.00	0.00					

Step					Act	on						
5a3	The Step 4 :	-	es screer	n app	ears:							
	1 Basic Information											
	2 Reservation	Step 4 : Exp		B. 314003								
	3 <u>Site Details</u> 4 Expenses	Traveler Name: 5		D: 314092	Authorization	Status: Nev	v Authorization	n				
	5 Accounting		ses have been updated s	uccessfully.								
	6 Travel Policy 7 Summary	Expense Informatio										
	Other Actions Remarks	Unassigned:	0.00									
	Attachments	Amount: 93	36.51									
	Printable Authorization Compact Printable Authorization	Order by: Date	Sort Ascent	ting Sort I	Descending							
	Daily Expenses Summary	Date Typ		Amount D				Pay	То	Alerts	Modify Copy	Delete
	Trip History Add Non-Federal Sponsor	12-Nov-2018 Los	dging		odging expense ncluding lodging		O, United State	es Trav	eler		Modify	
	View Routing History Travel Agent Assistance	Mar	als and Incidentals ucher Transaction		1&IE expense in		United States	Trav			Modify	
	Extras	18-Nov-2018 Fee		15.51 V	oucher Transac	tion Fee		Ager	ncy Billed		Showing 1 - 3	of 3
												012
	Because the over to the N On the m 	leals and	l Incident	als.		-	•					,
5a4	The <i>Meals</i> and Meals and Incidental E		ental Exp	ense	s pop-	up wi	indow	/ appe	ars:			
	✔ Filter Options	✓ Apply to A	ll Displayed Exper	ises								^
	Meals and Incidenta	ls Site: Boulder, CC	D, United States									
	Order by: Date		Sort Ascending	Sort I	Descending							
	Date Reimburser Type	ment Per Diem Meals	Per Diem Incidentals		Breakfast Provided	Lunch Provided	Dinner Provided	No Incidentals	Official Day Off	Рау То	Notes	
	12- Nov- 2018	▼ 61.00	5.00	<u>49.50</u>						Traveler 🔻		
	13- Nov- 2018	▼ 61.00	5.00	<u>66.00</u>						Traveler v		
	14- Nov- 2018	▼ 61.00	5.00	<u>66.00</u>						Traveler 🔻		
	15- Nov- Per Diem	▼ 61.00	5.00	<u>66.00</u>						Traveler 🔻		•
	Save and Close	Save	Exit Window									
	Scroll dov	vn to the	bottom o	of the	windo	w						

Step						Act	on					
5a41	here c would	on the M&I	E. The	e Friday	/ date	will a	lso be	mai	rked of	ffas	s off also s the ¾ day back had l	as that
	NO 000000000000000000000000000000000000	l Incidental Expenses										
	13- Nov- 2018	Per Diem 🔻	61.00	5.00	<u>66.00</u>					٥	Traveler •	•
	14- Nov- 2018	Per Diem 🔻	61.00	5.00	<u>66.00</u>						Traveler •	
	15- Nov- 2018	Per Diem 🔻	61.00	5.00	<u>66.00</u>						Traveler •	
	16- Nov- 2018	Per Diem 🔻	61.00	5.00	<u>49.50</u>						Traveler •	
	17- Nov- 2018	Per Diem	61.00	5.00	0.00							
	18- Nov- 2018	Per Diem	61.00	5.00	0.00					•		
		т	otal Estimat	ed M&IE:	297.00							
		e and Close Sa ck <i>Exit Wi</i>		kit Window								×
		CK EXIT VVI	naow									

Step			Action			
5a5	The Step 4:	Expenses scree	en appears:			
	Basic Information Reservation Site Details Expenses Accounting Travel Policy Summary Other Actions Remarks Attachments	Step 4 : Expenses Traveler Name: SELENA JENKINS Trij Expense Information Agency Billed: 15.51 Traveler: 921.00 Unassigned: 0.00 Armount: 936.51 Filter Options Order by: Date Sort Asce		orization		
	Printable Authorization Compact Printable	Date Type	Amount Description	Pay To	Alerts	Modify Copy Delete
	Authorization	12-Nov-2018 Lodging	624.00 Lodging expense in Boulder, CO, Uni including lodging taxes	ted States Traveler		Modify
	Daily Expenses Summary Trip History	12-Nov-2018 Meals and Incidentals	297.00 M&IE expense in Boulder, CO, United	i States Traveler		Modify
	Add Non-Federal Sponsor View Routing History	18-Nov-2018 Voucher Transaction Fee	15.51 Voucher Transaction Fee	Agency Billed		
	Travel Agent Assistance	Add New Expense			Rer	Showing 1 - 3 of 3 mark: Reduced:
	\$9.12 = Trans 50 miles one \$10/day for P \$400 for Rent \$80 for Renta \$15/day for P	way to airport u Parking at the Air tal Car	sing private vehicle rport	e (POV) (x2)		
	the loca ✓ If you ha the tran ✓ The sys	tions in your site d ad a reservation tie sportation costs (i.e tem will automatica	ally populate your Lodg etails. ed to the authorization i e. airfare, TMC fee and ally put an expense cos y charged until you file	the system will au I rental car) st for a Voucher T	tomatic	cally populate
6	expenses.	expenses have l	en of the authorizat been entered	ion appears wi	th the	e updated

Step		Action						
7	The Step 5: Accounting screen of the authorization appears:					ars:		
		uthorization						
	Trip Dashboard	uthorization						
	1 Basic Informa	tion	Step 5 : Accountir	ng 😧				
	2 <u>Reservation</u> 3 <u>Site Details</u>		Traveler Name: SELENA JEN	IKINS Trip ID: 314	092	Authorization Status: New Authori	orization	
	(4) Expenses		No account codes selecte	d. Click the 'Select Ac	count C	odes' link below to add an account	code.	
	5 Accounting 6 Travel Policy							
	7 <u>Summary</u>		Accounting					
			(i) No account codes se	elected.				
	Other Actions Remarks		Select Account Codes					
	Attachments Printable Authorizatio	20	Select Account codes					
	Compact Printable Authorization	1	Save and Next Step	Save	ack to S	Step 4: Expenses		
	Daily Expenses Sumn	nary	Save and Next Step	Jave	OCK TO D	arek at rokenses		
	Trin Listan:							
			ct Account C	odes link				
	Add an		Code Ind Close					
			nd Next Step					
		ive un						
8	The Step 6	: Trav	el Policy scr	een of the	e au	ithorization appe	ears:	
	Trip Dashboard Authorization							
	1 Basic Information	Step 6	: Travel Policy 🧉	ravel Policy 😰				
	2 Reservation 3 Site Details		lame: SELENA JENKINS Trip ID:	314092 Authorizatio	Status:	New Authorization		
	Expenses Accounting	A These	policy items are incomplete: Air Ca	bin Class, and Rental Car T	pe.			
	6 Travel Policy	O Accou	nting information has been saved s	uccessfully.				
	(7) Summary						collapse or expand all sections	
	Other Actions Remarks	Travel Po	licy Justifications				^	
	Attachments Printable Authorization	Policy Ite		Information Select one	•	Explanation		
	Compact Printable Authorization	Rental C		Select one	•			
	Daily Expenses Summary Trip History	*Required						
	Add Non-Federal Sponsor View Routing History		licy Warnings				^	
		Policy Ite	Item Information					
	Extras	Lowest I	Logical Airfare	No comm	ercial air	r reservation.		
	Select junction	ustifica	ations if need	ed				
			nd Next Step					

Step	Action				
9	The Step 7: Summary screen of the authorization appears:				
	 Basic Information Reservation Site Details Expenses Accounting Travel Policy Summary Other Actions Remarks Attachments Printable Authorization Compact Printable Authorization Daily Expenses Summary Trip History Add Non-Federal Sponsor Yiew Routing History Travel Agent Assistance Extras	Step 7 : Summary Traveler Name: Stelen Name: Step Stele			
	Notes: ✓ By ent warnir	tering expenses on days of leave when you get to Step 7: Summary you'll see a ng banner at the top of the screen. It won't stop you from finishing the rization.			
10a	authorization.				
	Click on	the Add Remarks tab			

Step	Action	
10b	The Add Remarks tab appears:	
	Remarks for 1165353 View Remarks Add Remarks Note: Remarks cannot be edited or deleted. Review all information before proceeding. Allowed: A+2:::0.9 \$(1/1:7@,.'')	for mileage and checked
	 baggage expenses will be on that date when vouchered. Click Save and Close 	
10c	Remark added successfully.	
	Click Send to Approver	

Step	Action
11	The Confirm Action pop-up will appear.
	Confirm Action
	Do you want to proceed?
	Confirm Cancel
	 Click Confirm
12	The My E2 screen should appear with a message at the top stating the authorization has been sent to the approver.

Objectives:

Exercise #14: Create TA Incorporating Multiple Locations

- Create a Basic Travel Authorization (TA)
 - Navigate each step of the TA

Instructions: Execute the following steps:

You are going to a site visit in Portland, OR on January 8, 2019 you'll then head up to Seattle, WA for the 10th. You will have a travel day on either day of the trip. Your authorization will need to include the following costs:

Estimated Expenses

\$1042.38 = Round-trip air fare
\$9.35 = Transaction Fee
50 miles one way to airport using private vehicle (POV) (x2)
\$15/day for Parking at the Airport
\$75 for Rental Car in Portland
\$65 for Rental Car Gas
\$75 for Taxi in Seattle
\$25/day for Hotel Tax in Portland
\$25/day for Hotel Tax in Seattle
\$25/flight Checked Baggage Fees

Step	Action				
1	From the <i>My E2</i> screen:				
	 Click the drop-down arrow on the "What would you like to do today?" field Select Create an Authorization Click Go 				
	At a Glance Trips Local Travel Open Authorization Group Authorization				
	Start a Travel Document				
	What would you like to do today? Make Reservations Make Reservations Show Held Reservations Create an Authorization				
	To Do List Create Local Travel Claim Create Local Travel Claim Create Core Authorization Create Group Authorization Create Group Authorization Create a new travel authorization, or other				
	travel documents.				
	Notes:				
	 ✓ In production, if you did not have a reservation set up, you would click Make Reservation ✓ In production, if you called the TMC, you would create your authorization and then associate the reservation to the authorization. 				
	 In production, if you had made your own reservation, but didn't create an authorization at the time of the reservation, you can still add it by going to held reservations and then create the authorization. 				
	 For Training Purposes we will not be working with the Online Reservation System or reservations 				

Step	Action			
2	The Step1: Basic Information screen of the authorization appears:			
	Solutions. TRAVELE	R'S TRIPS TRAVELER'S PROFILE		
	 Basic Information Reservation 	Step 1 : Basic Information 🝘		
	3 Site Details	Traveler Name: SELENA JENKINS Trip ID: New Authorization Status: New		
	(4) Expenses	Basic Information		
	5 Accounting			
	6 Travel Policy	Type of Travel:* Select Type of Travel Second Figure 2 Constitution of the second		
	7 Summary	Specific Travel Purpose:* Document Number: (System Assigned)		
	Extras			
	Trips List	*Required		
	Delete Authorization not allowed at this time			
	 Select the <i>Type of Travel</i> (i.e. Mission) Enter the <i>Specific Travel Purpose</i> (i.e. Site Visit to Portland, OR and Seattle, WA) Click <i>Save and Next Step</i> 			
	Notes:			
	 ✓ The E2 Solution documents tog ✓ The Trip Number 	ons travel system generates a Document Number for the Authorization. Ons travel system generates a Trip Number that groups all travel of ther. Der is the number that keeps the authorization and vouchers together and I to query for information.		

Step	Action			
3	The Step 2: Reservation screen of the authorization appears:			
	Trip Dashboard Authorization			
	 Basic Information Reservation Site Details Traveler Name: SELENA JENKINS Trip ID: 314181 Authorization Status: New Authorization 			
	4) Expenses 5) Accounting Basic Information has been successfully updated.			
	6 Travel Policy Confirmation Number: 7 Summary Make New Reservation Manage Trip Reservations			
	Other Actions			
	Remarks Next Step Back to Step 1: Basic Information			
	Daily Expenses Summary			
	Click Next Step			
	Notes:			
	 ✓ For training purposes we will be skipping this step. ✓ In Production, this is the step you would be using if you had made a reservation out of the system and needed to associate it to the authorization by using Manage Trip Reservations. ✓ If you had a reservation already associated, this is the screen you'd go to in order view/change your reservation. 	2		

Step	Action					
4a	The Step 3: Site Details screen of the authorization appears:					
	1 Basic Information 2 Reservation 3 Site Details 4 Expenses	orization <u>collapse</u> or <u>expand</u> all sections				
	(5) Accounting [Site 1] Begin: Washington, DC, United States (6) Travel Policy. Departing Date:* Image: Constraint of the states (7) Summary Departing Date:* Image: Constraint of the states (8) Other Actions Departing Time:* Morning - 08:00 AM • Other Actions Departing From: * Washington, DC. United States Going To:* Attachments Going To:* Daily Expenses Summary Arrival Date:* Image: Conmercial Plane Trip History Reason For Stop:* Temporary Duty View Routing History Travel Agent Assistance Add Site					
	 Extras Trips List Create Trip Template Select the Departing Date (i.e. January 7) Select the Departing Time (i.e. defaults to n Change the Departing From if needed (i.e. of Enter the Going To (i.e. Portland) Click Add Site 	e ,				
4b	The Site 2 part of the screen appears:					
	[Site 2] From: Portland, OR, United States Departing Date:* D8-Jan-2019 Departing Time:* Morning - 08:00 AM ▼ Departing Trom: Portland, OR, United States Going To:* Arrival Date:* Mode of Transportation:* Commercial Plane Reason For Stop:* Temporary Duty > Select the Departing Date (i.e. January 9) > Select the Departing Time (i.e. defaults to n > Change the Departing From if needed (i.e. 0) > Enter the Going To (i.e. Seattle) > Scroll down	0,				

Step	Action
4c	[Site 3] End: Seattle, WA, United States on 09-Jan-2019 to Washington, DC, United States
	Returning Date:* 09-Jan-2019 Returning From: Seattle, WA, United States Returning To:* Washington, DC, United States Arrival Date:* 09-Jan-2019 Arrival Time:** Select Mode of Transportation:* Commercial Plane
	 *Required **Required if trip duration is less than three days Save and Next Step Save Back to Step 2: Reservation Select the Returning Date (i.e. January 11) Select the Arrival Time Click Save and Next Step
	Notes:
	 ✓ For training purposes we will be entering information into this section. ✓ If there is a reservation associated to the authorization this information will automatically fill out based off the reservation, but it should still be looked at to make sure all information is correct for per diem purposes. ✓ If changes occur to reservations, this screen is not automatically updated.

Step		Action				
5	The Step 4:	-	en of the authorization ap	pears:		
	1 Basic Information 2 Reservation 3 Site Details 6 Expenses 6 Expenses 6 Site details information has been saved successfully.					
	6 Travel Policy 7 Summary Other Actions Remarks Attachments Printable Authorization Compact Printable	Expense Information Agency Billed: 15.51 Traveler: 1002.50 Unassigned: 0.00 Amount: 1018.01 Filter Options				
	Authorization Daily Expenses Summary Trip History Add Non-Federal Sponsor View Routing History	Order by: Date Sort As: Date Type 07-jan-2019 Lodging 07-jan-2019 Meals and Incidentals	Amount Description 300.00 Lodging expense in Portland, OR, United States including lodging taxes 115.50 M&IE expense in Portland, OR, United States	Pay To Traveler Traveler	veler	Modify Copy Delete Modify Modify
	Travel Agent Assistance	09-Jan-2019 Lodging	378.00 Lodging expense in Seattle, WA, United States including lodging taxes	g Traveler		Modify
	Extras	09-Jan-2019 Meals and Incidentals	209.00 M&IE expense in Seattle, WA, United States	Traveler		Modify
	break out the enter your he \$1042.38 = I \$9.35 = Tran 50 miles one \$15/day for I \$75 for Rent \$65 for Rent \$75 for Taxi \$25/day for I \$25/day for I	e lodging and M otel tax per loca Round-trip air fa nsaction Fee way to airport of Parking at the A al Car in Portlar al Car Gas	using private vehicle (PO ^v irport nd tland attle	this me gexpen	eans y	
	 Verify all Click Nex 	expenses have xt Step	been entered			

Step			Ac	tion		
6	The Step 5: Accounting screen of the authorization appears:					
	Trip Dashboard Authorization					
	 <u>Basic Information</u> <u>Reservation</u> Site Details 	Step 5 : Accounting 3 Traveler Name: SELENA JENKINS Trip ID: 314181 Authorization Status: New Authorization			zation Status: New Authorization	
	<u>4 Expenses</u> 5 Accounting	A No account code	No account codes selected. Click the 'Select Account Codes' link below to add an account code. Accounting			
	 6 <u>Travel Policy</u> 7 <u>Summary</u> 	Accounting				
	Other Actions	() No account c	odes selected.			
	Remarks Attachments	Select Account Co	<u>des</u>			
	Printable Authorization Compact Printable			Deck to Over 4 St		
	Authorization Daily Expenses Summary	Save and Next St	ep Save	<u>Back to Step 4: Ex</u>	<u>herizez</u>	
7	 Add an ACCS Code Click Select and Close Click Save and Next Step The Step 6: Travel Policy screen of the authorization appears: 			tion appears:		
	1 Basic Information Step 6 : Travel Policy @					
	3 Site Details	aveler Name: SELENA JENKINS Tr	ip ID: 314181 Authorizati	on Status: New Authorizatio	n	
	5 Accounting	These policy items are incomplete:	Air Cabin Class, and Rental Car	Type.		
	Travel Policy Summary	Accounting information has been sa	wed successfully.			
	Other Actions Tr	avel Policy Justifications			<u>collapse</u> or <u>expand</u> all sections	
	Remarks	aver Porcy Justifications			~	
	Printable Authorization	Policy Item	Information	Explanation		
	Compact Printable	Air Cabin Class Rental Car Type	Select one	•		
	Daily Expenses Summary	,,				
	Trip History *Re Add Non-Federal Sponsor	quired				
	View Routing History Travel Agent Assistance	ravel Policy Warnings	el Policy Warnings .			
	р	Policy Item owest Logical Airfare	Inform No co	ation mmercial air reservation.		
	-	fications if nee and Next Ste				

Step	Action					
8		The Step 7: Summary screen of the authorization appears:				
	Trip Dashboard Authorization 1 Basic Information 2 Reservation 3 Site Details 4 Expenses 5 Accounting 6 Travel Policy 7 Summary Other Actions Remarks Attachments Printable Authorization Compact Printable Authorization Daily Expenses Summary Trip History Add Non-Federal Sponsor View Routing History Travel Agent Assistance Extras	Step 7 : Summary Traveler Name: SELENA JENKINS Trip ID: 314181 Authorization Status: Noreservation - Edit Details Reservation - Edit Details No reservations found. Site Details - Edit Details Site Details - Edit Details Site 2] From: Portland, OR, United States on 09-Jan-2019 to Seattle, WA, United States				
9a	Remarks pop Remarks for 334181 View Remarks Add Remarks To remarks found.	Remarks link p-up window appears:				

Step	Action
9b	The Add Remarks tab appears:
	Remarks for 314181
	View Remarks Add Remarks Note: Remarks cannot be edited or deleted. Review all information before proceeding. Allowed: Av2: 0 9 \$ (1/: 7 @*
	Allowed: <pre>////// #</pre>
	2000 characters left.
	Save and Close Save Ext Window
	Enter Remarks (i.e. Need rental car in Portland due to multiple location site visits enough the Dettland ence)
	 around the Portland area.) Click Save and Close
	 Add any Attachments Click Send to Approver
10	The Confirm Action pop-up will appear.
	Confirm Action
	Do you want to proceed?
	Confirm Cancel
	 Click Confirm
11	The My E2 screen should appear with a message at the top stating the authorization has been sent to the approver.