

Approving Documents Quick Reference Card

Approvers review travel documents, ensuring that:

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

See the other "**Approving** ..." user guides for more detailed information on how to approve a specific document type.

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

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

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Pending Approval list on My Approvals page

 (Optional) To view a list other than the default one, click the Filter Options Expand button. The Filter Options section appears. Select your search criteria and click Apply Filter. 3. Locate the document in the list and click the **Show** link to open it. The summary page for that document appears. This view of the document is very similar to what the traveler sees when creating the document.

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Voucher Summary page

- Make sure the document is locked to you. The document is locked if the Unlock link appears in the OTHER ACTIONS section. If the Lock link appears, the document is not currently locked to any approver. Click Lock to continue.
- 5. Use the **Summary** page to review each section of the document. If you need to see additional information or make changes to a section, click the **View Details** or **Edit Details** link for that section.

Click the **Printable Profile** link, in EXTRAS, to view or print selected information from the traveler's profile.

- 6. Approve, return, or unlock the document.
 - Approve Click Approve and Confirm. In the case of warnings or errors that result in approval failure, contact your agency's financial system help desk for assistance with next steps.

- Return to traveler (or document owner) for revision
 - a. Click **Return to Traveler** or **Return to Owner**. The **Confirm Action** window appears.
 - b. Select the **Reason** that you are returning the document from the list.
 - c. Enter your **Remarks** and click **Confirm**.
- Make the document available to another approver Click Unlock.

Viewing Other Trip Related Documents

Dashboards are available for:

- Group Authorizations
- Open Authorizations
- Trips



Example Trip Dashboard for Authorizations

A dashboard displays a summary of all -related documents. It also displays the status of these documents.

For example, the Trip Dashboard provides information about authorizations, comparative trips, vouchers, advances and reservations for a specific trip.

To view a document, click the document's $\ensuremath{\textbf{Show}}$ link.

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