## 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.
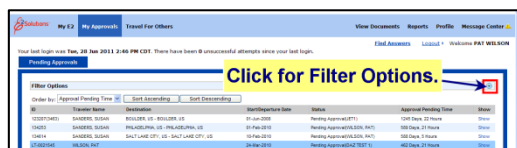


**Pending Approval list on My Approvals page**

2. (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.
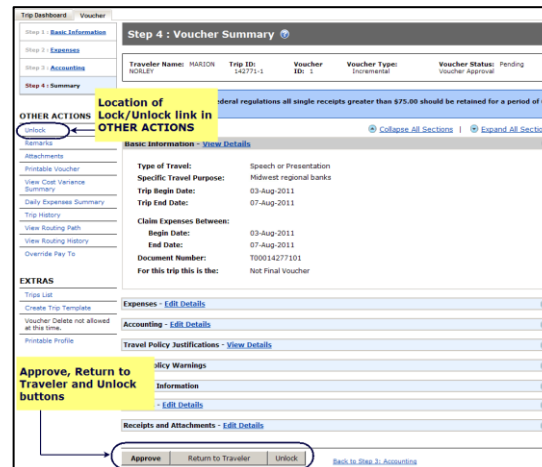


**Voucher Summary page**

4. 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
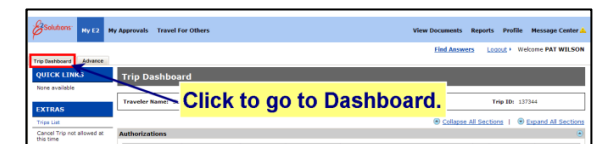


**Example Trip Dashboard for Authorizations**

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 **Show** link.

Release 14.3 – September, 2014

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http://www.cwtsatotravel.com