Create, Review, Submit Authorization (Continued)

Create an Authorization without a Reservation…

1. On the **Home** page under the **I Want To...** section, click **Create a new authorization**.
2. Select a **Document Type** from the **Document Type** list.
3. Click **Create Document**.
4. On the **Document Information** tab, select a trip **Type Code** and **Purpose Code** from the drop down. Add a trip description
5. Click the **Trip Information** tab, choose a **Depart From** and **Return to** locations, and choose a **Trip Duration** if other than Multiple Days. If needed, enter Trip **Comments.**
6. Under Itinerary Locations, enter the Arrival Date and Departure Date and enter the TDY Location (use the binoculars if needed to search for a TDY Location)
7. Click **Create Document**. The system creates and saves the document. For the following steps, you can also click **Next.**
8. On the **Expenses** tab, choose any additional expense using the drop down menu, then enter the Cost. Click Save and then click Add Expense (on left) if adding more expenses.
9. Click on the **Exceptions** tab if adding a special authorization reason to the authorization (i.e. Rental Car Authorized)
10. Click the **Accounting** tab and edit the Enter Charge Code label to enter your Office's accounting string.
11. Click the **Confirmation** tab, review the Status to Apply, enter any Remarks if needed.
12. Click **Stamp and Submit Document**.
13. Review the Pre-Audit List. Make any necessary changes, or use the **Justify Pre-Audit Results** button to add reasons for any items that display a Fail status and click **Save Comments**.
14. Click **Continue Stamping the Document.**
15. Click **Close Post Stamping Document Closure Screen** button. *The system routes the TA to the next approver in the routing list.*

Create a Voucher from an Authorization

1. On the **Home** page, click **Create a new voucher** (you can also click the Vouchers tab).
2. On the New Voucher page, select a **Document Type** from the list: Voucher from Authorization.
3. Click **Create Document**.
4. Choose the Authorization you want to create the voucher from by clicking on the pencil/paper edit icon next to the TA
5. You may have to re-enter **Type Code** and/or **Purpose Code** on the **Document Information** tab.
6. Verify the fields on the **Trip Information** page, make edits if needed.
7. Click **Create Document**. The document is saved.
8. On the **Expense** tab, edit, delete, and or add expense details either by using the icons on the left or **Add Expense Details** on the right. If you add new expenses, choose the new expense from the drop down, add the Cost, click Save. If you need to add more than one expense, you will have to click the Add Expense button to the left of the page. Lodging and Per Diem expenses automatically populate and can be edited.
9. On the Accounting page, any accounting codes already selected for the document display in the **Available Accounting** area. You can use the edit icon to edit the accounting string.

10. On the Totals page, review the **Total Reimbursable Amount** to verify the net to traveler appears correct.
11. Click **Next** or **Submit** or click the **Confirmation** tab.
12. On the **Confirmation** page, in the **Status to Apply** list, verify that **VOUCHER SIGNED** is selected. Enter **Remarks** if needed.
13. Click **Stamp and Submit**.
14. Review the **Pre-Audit Results** and correct or **Justify Pre-Audit Results** to explain any items with a **Fail** status. If you have to justify, enter the comments and click **Save Comments**.
15. Click **Continue Stamping the Document**.
16. Click **Accept Signature Text** and click **Close Funding** button.
17. Click **Close Post Stamping Document Closure Screen**.

Canceling/Changing a Trip

You will have to contact the travel agency to make changes to airfare after ticketing. However, many customers are able to make pre-ticketing changes to city-pair fares. Be aware that changing a reservation may generate a fee.

1. On the **Travel** tab, click the **Trip Library** tab. If you see the **Cancel Trip** under Action, you are able to cancel your reservations for this trip.
2. If you want to make changes, click the name of the trip, and then on the **Trip Actions** menu, click **Change Trip**. If Change Trip is not an option, click **Cancel Entire Trip** and rebook.
3. On the itinerary, click the appropriate link to :
   - Add or modify a hotel reservation
   - Add or modify a car rental reservation
   - Modify a flight
   - Cancel a reservation
4. Click **Next**. An updated itinerary appears once the transaction is complete.
5. To cancel your entire trip, click the name of the trip, and then in the **Trip Actions** menu, click **Cancel Trip**.
6. Enter any comments for reporting, and then click **OK**.

Approving an Authorization or Voucher

1. On the **Home** tab, under the **Awaiting Approval** Section, click the **Authorization** or **voucher** you want to approve or click the link that says **View All Documents Awaiting Approval**. Or you can click **Approve authorizations and vouchers** under the I want to…section.
2. To approve a document, you will need to click the **Select Document** icon. Once clicked it will change to a checkmark.
3. An approver has multiple ways to review the document either click the second **Preview Document** icon to review the document as a **PDF display** or click the third **Review Document** Icon to review the Document using the Concur Document Summary view. You can also use the fourth reservations icon to review if a cheaper airfare could have been booked.
4. Once the document has been reviewed, click the **Preaudit & Stamp Selected Document (s)** button – Note: the first **Select Document** icon from Step 2 must be checked.
5. Review the Justifications noted on the Pre-Audit list page if any and then click the **Continue Signing Document(s)** button.
6. Make sure the **Status to Apply** is set to **Approved** and click the **Stamp Selected Documents** button.
7. Click the **Close Stamping Log Screen** button.

Concur®

CGE Federal Traveler Quick Reference Guide

Log into CGE

https://cge.concursolutions.com/. For first time log-ins, converted users will receive an email from CGE so they can establish a password and will have to set a security question.

1. In the **User Name** field, enter your **Active directory ID with the ending @bureau.gov**, i.e. jdoe@usgs.gov
2. In the **Password** field, enter your **password**.
3. Click **Login**.

If you need assistance, call 1-855-847-6398 for TMC or CGE support, or check with your local System Administrator.

Explore the Home Page

1. Use the I Want To ... section to:
   - Create or change a reservation
   - View authorizations
   - Create a new authorization
   - Create an authorization from an Agent-booked trip
   - View Vouchers
   - Create a new voucher
   - Edit my profile
   - Approve authorizations and vouchers
2. If this is your first time logging in, click on Edit my profile or click the Profile tab to enter important Personal and Charge Card Information
3. Preview the **Alerts** section and **Charge Card Status** section for info about charge card and e-receipts that apply to a voucher.
4. View the **Important Information** section for info from your Agency about the travel service and GSA policy.
5. The Recent Trips section lists your five most recent trips. In this section, you can:
   - Click a trip name to view additional information about it.
   - Click **View All Trips** to see current and past trips.
   - Click **Create a New Trip** to create a trip.
6. The **Recent Authorizations** and **Recent Vouchers** sections list your 15 most recent authorizations or vouchers. You can view all authorizations/vouchers and create a new authorization or voucher.
   - In the **Name** column, click the appropriate link to View or Edit an authorization/voucher, or view associated vouchers, authorizations, or itineraries.
   - Click **View All Authorizations** or **View All Vouchers** to see all current and past documents.
   - Click **Create New Authorization** or **Create New Voucher** to create a new document.
7. The **Awaiting Approval** section lists all authorizations and vouchers awaiting your approval. You can click on the document in the **Name** column to view its details, or click **View All Documents Awaiting Approval** to view your queue.

Make a Travel Reservation

On the **Home** page, click the **Travel** tab, then **Policy**. Click **Close**.

Book a Reservation...

1. On the **Home** page, under the **I Want To …** section, click **Create or Change a Reservation**. Alternatively, you can click the **Travel** tab.
2. Click the **Air/Rail** tab (this is the default tab) and enter your travel reservation information.
3. Select the applicable trip option: **Round Trip**, **One Way**, or **Multi-Segment**.
4. In the **Temporary Duty Location** area, leave the default **Reference Point**, and enter the TDY location and click the **Find Location** button.
5. In the **TDY Per Diem Location** drop down box, select the appropriate **TDY Per Diem Location** based on County.
6. In the **Departure City** and **Arrival City** fields, enter the airport cities if they are blank or differ from what is displayed.
7. Select the **Departure** and **Return** dates and times.
8. If you need a car, select the **Pick-up/Drop-off car at Airport** check box.
9. If you need a hotel, select the **Find a Hotel** check box.
10. Select the appropriate button to search for flights by **Price** or **Schedule**. Search by Price prepares a flight combination for you. Search by Schedule lets you prepare your flight one leg at a time.
11. Click **Search**. The airline/rail options display:
    - Green: Indicates the fare is within policy. Three Blue Stars indicate the city pair fare contract which follows policy.
    - Yellow: indicates the fare is outside of policy. If you select this fare, you must enter additional information to justify the selection.
    - Red: Indicates the fare is outside of policy (typically non-refundables with penalties/restrictions. If you select this fare, you must enter additional information to justify the selection.
12. To view more information about the flights, click the **Expand All Details** link.
13. Above the **Fares** list, click **Show fare display legend** to view the fare legend.
14. To reserve a flight, click the **Fares** or **Reserve** button to expand the details for that flight. Then click the **Reserve** button. The system displays the Travel Details page.
15. Click **Next** to get through Charge Card screen (edit if needed).

Select a Seat for a Flight…

1. Click the **Select Seat** or **Change Seat** link to view the **Seat Map**.
2. In the **Seat Selection** field, choose an unoccupied seat, then click **Select/Change Seat**. Use the drop down to view other flights and repeat. Click **Save** or **Change Seat**
3. Once you make all your seat selections, click **Close**.

Select preferential seats shown in yellow require your airline frequent flyer number to be in your Travel profile. Seats marked handicapped can only be selected by a travel agent, and you can notify your travel agent during the reservation process.

Make a Travel Reservation (Continued)

Select a Car…

*If you selected **Pick Up/Drop off Car at airport** on the **Air/Rail** tab, the system displays the car search results after you select your flight. You can also reserve a car by clicking the **Car** tab on the **Travel** page.*

1. If you require a car with airfare, a matrix of cars displays.
2. Scroll down and choose the most affordable Compact Car that displays with a Green **Reserve** button, ensuring that car is covered under the Govt DTMO Rental Car contract. Never choose a Red **Reserve** button to avoid liability issues.
3. If you require a car without airfare, on the Travel tab, click the **Car** tab.
4. Enter Pick-up and Drop-off dates and Location, click **Search**.
5. Select a car as described in Step 2, and then click **Reserve**.

Select a Hotel…

*If you selected the **Find a Hotel** option on the **Flight** tab, the system displays hotel results after you choose your rental car.*

1. If you require a hotel with airfare, hotels display next with Fedrooms participants marked with a star. The Lodging Per Diem limit is listed at the top of the page.
2. Click **Choose Room** next to the hotel you want to reserve.
3. Fedrooms will display with a star and as green. Other rates that may be within per diem can display as yellow or red.
4. Highlight the button next to Room type you want and click **Reserve**. Read and accept the hotel rules and click **Continue**.
5. If you require a hotel without airfare, on the **Travel** page, click the **Hotel** tab.
6. Enter the location where you need a hotel and click **Find Location**. Choose the correct location and related County.
7. Choose **Check-In** and **Check-out** dates.
8. To narrow your search, you can type the name of a specific hotel under the Hotels Search area, in the **With names containing** checkbox and field, or you can choose radio buttons to search by **Airport**, **Address,** or **Reference Point/Zip Code** and click **Search**.
9. Click **Expand All Details** to see specific room rates offered by all hotels in the list. Or click **Choose Room** below the hotel name to view the rooms for the specific hotel.
10. Click **more info** to view more detailed information for a specific hotel. Fedrooms will be marked with a star.
11. When you are ready to reserve a hotel room, select the radio button next to the desired room, and then click **Reserve**.

12. Read the hotel rules, check the box that you agree with the rules, and click **Continue.**

Complete your Booking…

Complete your reservations, and then click **Next** to advance to the **Travel Details** and **Trip Booking Information** pages.

1. Enter a Trip Description in the **Trip Description** box to help easily identify this trip from others.
2. Enter additional email addresses separated by commas, if desired.
3. Enter a **Trip Purpose** from the drop down box. Click **Next**.
4. Click **Confirm Booking** to submit the Authorization.

Create, Review and Submit an Authorization

CGE automatically creates an authorization once you confirm a booking. You can also create an authorization without making a reservation.

Review and Submit an Authorization from a Booking…

1. Once you confirm a booking, the **Authorization** page displays the **Document Toolbar**.
2. The **Summary** page sections correspond to the **Document Toolbar**. Scroll through the options, or navigate using the tabs.
3. On the **Expenses** tab, choose any additional expense using the drop down menu, then enter the **Cost**. Click **Save** and then click **Add Expense** (on left) if adding more expenses.
4. Click on the **Exceptions** tab if adding a special authorization reason to the authorization (i.e. Rental Car Authorized)
5. Click the **Accounting** tab and edit the Enter Charge Code label to enter your Bureau's or Office accounting string.
6. Click the **Confirmation** tab, review the **Status to Apply** says **AUTHORIZATION SIGNED**, enter any **Remarks** if needed.
7. Click **Stamp and Submit Document**.
8. Review the **Pre-Audit** List. Make any necessary changes, or use the **Justify Pre-Audit Results** button to add reasons for any items that display a Fail status and click **Save Comments**.
9. Click **Continue Stamping the Document**.
10. Click **Close Post Stamping Document Closure Screen**.

The system routes the TA to the next approver in the routing list.

Arranging Travel for Others

1. Work with your Federal Agency Travel Administrator (FATA) to ensure you have the Group Access to book for others.
2. In the upper right hand corner of the screen, there is a section that says: You are administering travel for Me in a drop down box.
3. Click the Search button and enter the traveler's first or last name that you want to arrange for, several names may appear. Click on the traveler's name and then click the OK button.
4. Follow the steps above to book reservations, create authorizations, or vouchers for others.
5. Travelers must sign their own vouchers.