



FedTraveler.com

Unit #1: FedTraveler.com Suite of Software

Module #2: FedTraveler.com for Travelers and Alternate Preparers

Participant Guide



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FedTraveler.com for Travelers and Alternate Preparers

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About FedTraveler.com for Travelers and Alternate Preparers

About This Guide

Welcome to the *FedTraveler.com for Travelers and Alternate Preparers Guide*, which will introduce you to the roles of the FedTraveler.com Traveler and Alternate Preparer, as well as the main features and functions of FedTraveler.com.

This Guide will assist you in class, serving as a detailed lesson plan for practice sessions on the computer and as a notebook. Appendix A contains the USDA Bridge Solution, and Appendix B contains the general terms and acronyms used in FedTraveler.com. This Guide uses several typographical conventions to help you quickly identify page elements, definitions, keystrokes, notes, tips, and cautions.

Projected time at the beginning of a group of lessons is approximate and may vary depending upon the user audience.

Although this Guide covers all of FedTraveler.com's capabilities, many of these functions are available only if enabled by the Agency's business rules and policies.

This guide contains the following lessons:

- Lesson 1: **Introduction** provides a brief history of FedTraveler.com and the benefits of the system to the user. It also reviews the FedTraveler.com process and introduces the roles and responsibilities of Travelers and Alternate Preparers.
- Lesson 2: **Getting Started** discusses gaining access to FedTraveler.com as a Traveler or Alternate Preparer, using the **Home** and **Organizer** pages as well as the Navigation Bar and Menu options.
- Lesson 3: **Modifying and Managing User Profiles** introduces you to managing your **User Profile**, travel profile preferences, and your password.
- Lesson 4: **Creating Travel Plans** introduces the basic procedures in the Travel Plan creation and submission process including foreign travel. It also covers how to amend Travel Plans.
- Lesson 5: **Document Control** discusses the document controls that allow you to work with Travel Documents such as opening, viewing, tracking, and printing.
- Lesson 6: **Alternate Preparers** provides an overview of the main tasks of Alternate Preparers, such as preparation and submission of Travel Plans on behalf of other Travelers and gaining control of a Travel Document that was created by another Alternate Preparer.
- Lesson 7: **Special Travel Plans** introduces you to the various Travel Plans that are specifically defined for a special circumstance. Some of these plans are created as an authorization for special travel and then used as the basis for creating a pre-approved Travel Plan.
- Lesson 8: **Creating Expense Reports** introduces the basic procedures for the expense reporting and reimbursement process. It covers creating and submitting Expense Reports for domestic and foreign travel, managing credit card transactions, and submitting receipts. It also covers how to amend Expense Reports.

Implementation FedTraveler.com for Travelers and Alternate Preparers Class Schedule

This course is designed to be taught as a one-day course.

Day 1	
Lesson	Time
Lesson 1: Introduction	15 minutes
Lesson 2: Getting Started	30 minutes
Lesson 3: User Profiles	30 minutes
Lesson 4: Travel Plans	2 hours
Lesson 5: Document Control	15 minutes
Lesson 6: Alternate Preparers	15 minutes
Lesson 7: Special Travel Plans	2 hours
Lesson 8: Expense Reports	40 minutes
Post Assessment Survey	10 minutes

Customer Service Representatives FedTraveler.com for Travelers and Alternate Preparers Class Schedule

This course is designed to be taught as a day and a half course.

Day 1	
Lesson	Time
Lesson 1: Introduction	30 minutes
Lesson 2: Getting Started	30 minutes
Lesson 3: User Profiles	1 hour
Lesson 4: Travel Plans	2 hours

Day 2	
Lesson	Time
Lesson 5: Document Control	1 hour
Lesson 6: Alternate Preparers	30 minutes
Lesson 7: Special Travel Plans	2 ½ hours
Lesson 8: Expense Reports	1 hour
Post Assessment Survey	15 minutes

Module 2 Objectives

After completing this module, you will be able to:

- Discuss the benefits to the Traveler and Alternate Preparer using FedTraveler.com
- Log in to FedTraveler.com
- Demonstrate how to modify and manage User Profiles
- Outline the procedures and processes to create a Travel Plan
- Explain Document Control requirements in FedTraveler.com
- Discuss the Alternate Preparer's role on behalf of the Traveler
- Define various Special Travel Plans
- Create and submit a Traveler's Expense Report

Page Elements

The names of Web pages, menu options, fields, and buttons are shown in bold text. For example, "On the **Login** page, type the Member ID in the **Member ID** field."

Key Information

Key information is emphasized with a graphic adjacent to the information presented in a shaded area. This Guide uses three types of key information boxes:



Hint

A Hint provides you with a helpful tip or shortcut.



Key Point

A Key Point gives you information that will aid in your understanding of the task or concept presented.



Watch Out!

A Watch Out! warns about some feature of the software or an action that may cause problematic results.

Procedures

Procedures detail the steps necessary to complete each task. Screen shots and notes are included as needed.

Known System Issues and Workarounds

Gray shading like this is used to identify approved workarounds for known system issues current at the time this edition was published. Release notices e-mailed from FedTraveler.com will inform you of fixes for these issues as they are implemented. For further information, go to the FedTraveler.com home page, <http://www.fedtraveler.com> and click the link entitled **Known System Issues and Workarounds** under **Latest News**.



Knowledge Checks

Knowledge Checks follow each lesson. There are several types of Knowledge Checks, including discussion questions, paper-based tests, and practical exercises.

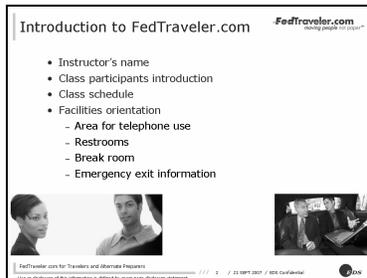
Practical Exercises present scenarios that participants can complete during training, or on their own, to reinforce the lessons taught in the classroom.

All Knowledge Checks are placed in the guide immediately after the section that explains the task.

Lesson 1: Introduction to FedTraveler.com

Introduction

This lesson provides a brief history of FedTraveler.com and the benefits of the system to the user. It also discusses the FedTraveler.com process and introduces the roles and responsibilities of Travelers and Alternate Preparers.

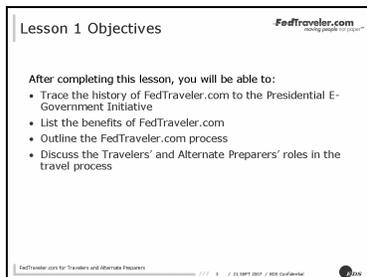


Slide 2: Introduction

Lesson 1 Objectives

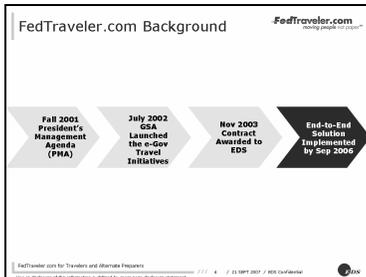
After completing this lesson, you will be able to:

- Trace the history of FedTraveler.com to the Presidential E-Government Initiative
- List the benefits of FedTraveler.com
- Outline the FedTraveler.com process
- Discuss Travelers' and Alternate Preparers' roles in the travel process



Slide 3: Lesson 1 Objectives

FedTraveler.com Background



Slide 4: FedTraveler.com Background

President's Management Agenda

The President's Management Agenda (PMA) was launched as a strategy for improving the management and performance of the federal government. It focuses on the areas where deficiencies were most apparent and where the government could begin to deliver concrete, measurable results.

The PMA includes five government-wide initiatives and 10 program-specific initiatives that apply to a subset of federal agencies. The PMA is helping departments and agencies adopt new disciplines to ensure their focus on results is effective and enduring.

GSA Launched the E-Gov Travel Initiatives

The E-Gov Travel (formerly known as eTravel) initiative was launched as a result of the PMA and the E-Government Act of 2002, and is managed by the General Services Administration (GSA). It is one of the 24 original E-Government initiatives. The Federal Travel Regulation (FTR) also mandated the implementation an E-Gov Travel product, also known as E-Gov Travel Service.

The E-Gov Travel vision is to deliver a unified, simplified service providing a cost-effective travel experience that supports excellent management, and results in superior customer satisfaction. As a collaborative, inter-agency initiative, the purpose of E-Gov Travel is to realize the efficiencies, cost-savings, and increased service associated with a common, automated, and integrated approach to managing the federal government's travel function.

The E-Gov Travel initiative aims to automate and consolidate travel processes for people traveling on official government business. The new systems are expected to simplify all portions of the process including planning, reimbursement, and reconciliation, and will give managers up-to-the-minute access



Slide 5: End-to-End Solution

to their travel budget obligations. It will also allow travelers to split their reimbursements and send money directly to travel card vendors.

E-Gov Travel Goals

E-Gov Travel is a collaborative, inter-agency initiative whose purpose is to realize operational efficiencies, cost-savings, and increased service to the federal Traveler through a common, automated, and integrated approach to managing federal government travel functions.

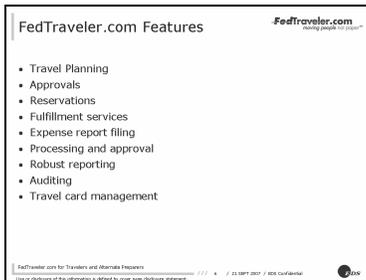
The goal of the E-Gov Travel Initiative is to provide world-class travel management practices to:

1. Consolidate federal travel
2. Minimize government role
3. Facilitate customer satisfaction

Benefits and Features of FedTraveler.com

FedTraveler.com guides federal employees through the travel reservation, planning, approval, and expense reporting processes.

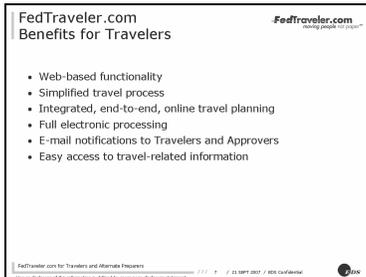
The FedTraveler.com service is a comprehensive “one-stop shop” that is FTR- and JFTR-compliant. These terms are explained later in this lesson.



Slide 6: FedTraveler.com Features

FedTraveler.com Features

- Travel Planning
- Approvals
- Reservations
- Fulfillment services
- Expense report filing
- Processing and approval
- Robust reporting
- Auditing
- Travel card management



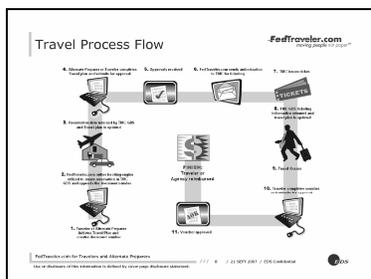
Slide 7: FedTraveler.com Benefits

FedTraveler.com Benefits

- Web-based functionality
- Simplified travel process
- Integrated, end-to-end, online travel planning
- Full electronic processing
- E-mail notifications to Travelers and Approvers
- Easy access to travel-related information

The FedTraveler.com Process

FedTraveler.com is a Web-based system for managing Federal employees' official travel with Federal Travel Regulation built into the system. Those travel regulations include Federal Travel Regulation (FTR) and Joint Federal Travel Regulation (JFTR). When fully implemented, FedTraveler.com will satisfy the President's E-Gov Travel Services initiative.



Slide 8: FedTraveler.com Process

Create Travel Plan

The FedTraveler.com process begins when a Traveler or Alternate Preparer (someone who prepares Travel Documents for other Travelers) initiates a Travel Plan, which is an electronic document that identifies the key travel information for a specific trip. The Plan, also known as a travel authorization or travel order, includes destinations, transportation arrangements and costs, lodging, and per diem entitlements.

Make Reservations

A Traveler can make online reservations for airlines, trains, rental cars, and hotels through FedTraveler.com in one of two ways:

- Directly book through the Online Booking Engine (OBE) that interfaces with FedTraveler.com.
- Manually type confirmed reservation information into FedTraveler.com.

Submit Travel Plan

Once a Travel Plan is completed, the Traveler must review and, if needed, add or modify any financial information before submitting the plan for approval.

Obtain Travel Plan Approval

Travel Plans submitted for approval are automatically routed to the Traveler's Approver(s), who reviews and approves or returns the plan to the Traveler. Once a Travel Plan is approved, the funds for the trip are obligated and tickets are reserved. If a Travel Plan is not approved, it is returned to the Traveler to take the appropriate corrective action.



Key Point

Tickets are not always purchased at the time the Travel Plan is approved. Tickets are purchased according to Agency rules.

Create Expense Report

After returning from the trip, the Traveler must complete an Expense Report to claim the actual expenses incurred during travel. An Expense Report is also known as a travel voucher, travel claim, or voucher. Using the receipts from the trip, the Traveler reviews the itemized expenses for accuracy and, if necessary, makes any changes to the total meals, lodging, transportation, rental car, and other expense amounts. Next, the receipts are prepared for submission to the FedTraveler.com system if over \$75 or per Agency policies.



Key Point

Receipts for lodging and car rental are always required regardless of cost.

Receipts Imaging

Receipts for any claimed expenses are submitted with the Expense Report. Copies of receipts are sent via fax to FedTraveler.com E-Gov Travel Service, where the receipts are scanned and saved as an electronic document.



Key Point

Each Agency will determine whether to use Receipts Imaging in its own FedTraveler.com system.

Submit Expense Report

When a Traveler submits a completed Expense Report for approval, the report is automatically routed just as its accompanying Travel Plan was.

Expense Report Approval

The Approver reviews the Expense Report and accompanying receipts. Once approved, the Traveler receives a reimbursement or makes a payment if appropriate. If an Expense Report is not approved, it is returned to the Traveler to take the appropriate corrective action.

Travelers' and Alternate Preparers' Responsibilities

FedTraveler.com has four user roles:

- Travelers
- Alternate Preparers
- System Administrators
- Approvers

Travelers manage their own individual Travel Plans and Expense Reports, and Alternate Preparers manage these documents for one or more Travelers. System Administrators manage the system configurations that the Travel Documents follow as they flow through the FedTraveler.com process. This course focuses on the tasks that Travelers and Alternate Preparers perform.

Travelers' Roles

Travelers create their personal travel documents for submission in a timely manner whenever possible. They make sure that:

- Travel arrangements and cost estimates in a Travel Plan are complete and reasonable for the mission.
- Actual costs in Expense Reports are accurate before submitting them for reimbursement.

FedTraveler.com for Travelers and Alternate Preparers
Use or disclosure of this information is defined by cover page disclosure statement

Slide 9: Travelers' Roles

Travelers' Roles

Travelers create their personal Travel Documents for submission in a timely manner whenever possible. They make sure that:

- Travel arrangements and cost estimates in a Travel Plan are complete and reasonable for the mission.
- Actual costs in Expense Reports are accurate before submitting them for reimbursement.

Alternate Preparers' Roles

Alternate Preparers create travel documents on behalf of Travelers who are assigned to them. They make sure that:

- Travel arrangements and cost estimates in a Travel Plan are complete and reasonable for the mission.
- Actual costs in Expense Reports are accurate before submitting them for reimbursement.

FedTraveler.com for Travelers and Alternate Preparers
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Slide 10: Alternate Preparers' Roles

Alternate Preparers' Roles

Alternate Preparers create Travel Documents on behalf of Travelers who are assigned to them. They make sure that:

- Travel arrangements and cost estimates in a Travel Plan are complete and reasonable for the mission.
- Actual costs in Expense Reports are accurate before submitting them for reimbursement



Knowledge Check

Circle the correct answer:

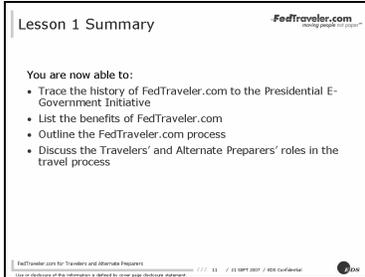
1. The E-Gov Travel initiative was launched as a result of :
 - a. The Federal Travel Regulation
 - b. The President's Management Agenda
 - c. General Services Administration mandate

2. A key benefit of FedTraveler.com is:
 - a. Travel Reservations
 - b. Time Card Resolution
 - c. Manual Processing

3. E-mail notifications to Approvers and Travelers are a feature of FedTraveler.com.
 - a. True
 - b. False

4. The Traveler's role includes the following:
 - a. Approve expense reports
 - b. Complete and review Travel Plans before submitting
 - c. Set up new users

5. The Alternate Preparer's role includes the following:
 - a. Approve expense reports
 - b. Set up new users
 - c. Check accuracy of actual costs before submission for reimbursement



Slide 11: Lesson 1 Summary

Lesson 1 Summary

Having completed Lesson 1, you are now able to:

- Trace the history of FedTraveler.com to the Presidential E-Government Initiative
- List the benefits of FedTraveler.com
- Outline the FedTraveler.com process
- Discuss the Travelers' and Alternate Preparers' roles in the travel planning process

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Lesson 2: Getting Started with the Software

Introduction

This lesson provides an overview of accessing FedTraveler.com and activating your new **User Profile**. You also will learn to use the **Organizer** page and to manage Traveler's tasks.

Lesson 2 Objectives

After completing this lesson, you will be able to:

- Launch the Web browser to access and use the FedTraveler.com Home page
- Identify and access online help and support resources
- Log in for the first time
- Activate your User Profile
- Identify common page elements
- Explain the Traveler's and Alternate Preparer's Organizer pages

Lesson 2 Objectives

After completing this lesson, you will be able to:

- Explain how to access and use the FedTraveler.com **Home** page
- Demonstrate how to use online help and support resources
- Demonstrate how to log in for the first time
- Show how to activate your **User Profile**
- Identify common page elements
- Explain the Travelers' and Alternate Preparers' **Organizer** pages

Slide 12: Lesson 2 Objectives

FedTraveler.com Home page

The FedTraveler.com **Home** page serves as a portal to FedTraveler.com and links to several Federal travel sites, including: Domestic Per Diem Rates, National Weather Service, Federal Travel Regulation (FTR), GSA Fed Rooms for lodging and Airfare: City Pairs.

You can see whether the system and the online booking engine (OBE) are available. You can also go to other sites such as news, policy, or planning sites.

Access FedTraveler.com using Internet Explorer 5.5 or greater, or Netscape 7.0 or greater, by logging in with a Member ID and Password (PIN). Your Member ID and PIN will be issued by your System Administrator (SysAdmin).

Accessing FedTraveler.com

To access FedTraveler.com:

1. Launch your preferred Web Browser (Internet Explorer or Netscape).
2. To navigate to FedTraveler.com, type <https://www.fedtraveler.com> in the Web-Browser address bar.

*The FedTraveler.com **Home** page displays.*



Slide 13: FedTraveler.com Home page

FedTraveler.com
 moving people not papersm

DESTINATION INFORMATION ON TIME

FedTraveler.com E-Gov Travel Service (ETS) is a comprehensive end-to-end service to plan, book, track, approve, and request reimbursement for travel services for the Federal employee.

FedTraveler.com Login

Member ID

PIN

[Login Help](#) [Forgot your PIN?](#) [Privacy Act](#)

System Status

- ✓ FedTraveler.com is available for Travel Planning and Expense Reporting.
- ✓ Online Booking Engine is available.

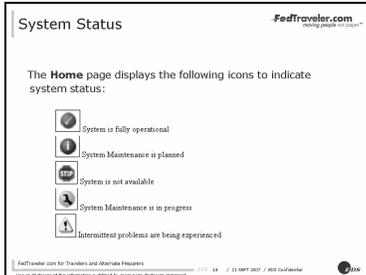
Latest News	Policies & Programs	Travel Planning	Help & Support
<ul style="list-style-type: none"> • Known System Issues and Workarounds • Valid Credit Card Necessary for Transaction Fees • New FedTraveler.com Transaction Fee Updates Effective 1/1/2007 • Call In Late Luggage • East Coast flights from Portland, Ore... set to double <p>More...</p>	<ul style="list-style-type: none"> • Domestic Per Diem Rates • Airfare: City Pairs • Privately Owned Vehicle (POV) Mileage Rates • Lodging: FedRooms • Federal Travel Regulation (FTR) • Joint Federal Travel Regulation (JFTR) • Travel Card: SmartPay 	<ul style="list-style-type: none"> • Airline Links • Flight Tracker • Security Checkpoint Wait Times • Currency Converter • Time Zone Converter • Airport Delays • Weather and Maps • Department of State Travel Advisories 	<ul style="list-style-type: none"> • FedTraveler.com Support Center • FedTraveler.com Tutorial

FedTraveler.com Home Page

Information about FedTraveler.com’s system status displays to the right of the Login box. Latest News contains links to known system issues and travel industry news. Policies and Programs include links to information about federal travel programs and regulations. Useful sites for the traveler are listed under Travel Planning. Help and Support contains links to the FedTraveler.com Support Center and the FedTraveler.com tutorial.

System Status

FedTraveler.com Home Page System Status Buttons



Slide 14: System Status

The following icons are displayed on the Home page to show system status:



System is fully operational



System Maintenance is planned. (Mouse over the icon to see planned schedule.)



System is not available



System Maintenance is in progress



Intermittent problems are being experienced

Descriptions are next to the symbols for system availability, maintenance, and intermittent problems. Hyperlinks provide more detail on the nature of the status and actions being taken to restore the system to full operational capability.

FedTraveler.com Help and Support

From the FedTraveler.com **Home** page the user has access to the **Support Center**, which includes several online help resources and a link to the **Contact Us** page, providing phone numbers and e-mail addresses for Call Centers and System Security.

Support Center

Clicking the **FedTraveler.com Support Center** link located in the **Help & Support** box of the FedTraveler.com **Home** page opens a new page. Links on this page provide several help options:

- Answers to Top Customer Support Questions
- User Guides, such as Printable Job Aids and Quick Reference Guides
- Online Help and FedTraveler.com Tutorial
- Contact Us link

FedTraveler.com
moving people not papersm

Home News Support Center

FedTraveler.com Support Center

Support Center Home

View the Top Customer Support Questions below or Browse the support questions by Topic.

Top Customer Support Questions

1. [I have forgotten my PIN. What do I do?](#)
2. [I have forgotten my answers to the security Questions and cannot refresh my PIN through the self service PIN Refresh function. What do I do?](#)
3. [I have forgotten my Member ID. What do I do?](#)
4. [Once I log into FedTraveler.com, where do I go to begin making travel plans?](#)
5. [What is the difference between a YCA contract fare and a CA capacity controlled fare?](#)
6. [FedTraveler.com doesn't display Government Contract flights for my destination\(s\). What should I do?](#)
7. [Can I make changes to my airline reservation in FedTraveler.com?](#)
8. [Can I get a copy of my itinerary without calling the FedTraveler.com Call Center or Travel Management Center \(TMC\)?](#)
9. [Why does my hotel reservation still show as "pending" after I reserved it in FedTraveler.com?](#)
10. [Can I cancel my airline / train reservation in FedTraveler.com?](#)
11. [How do I verify where my Travel Plan or Expense Report is in the approval process?](#)
12. [Can I verify my ticket has been issued without calling the FedTraveler.com Call Center or the Travel Management Center \(TMC\)?](#)
13. [Why did I receive an e-mail stating my credit card was rejected?](#)
14. [Can I remove my credit card from FedTraveler.com after booking my reservation?](#)
15. [As an Alternate Preparer, can I initiate an Expense Report for my Traveler?](#)

Many of these FAQs pertain to system functionality in the full end-to-end FedTraveler.com solution. As such, some of these topics will not pertain to USDA users. If you can't find an FAQ that answers your question, please email your questions to the Call Center at CallCenter@FedTravelerSupport.com.

Browse Support Topics

Browse by Topic

Customer Support Resources

User Guides

- [Traveler and Alternate Preparer Printable Job Aids](#)
- [Approver Printable Job Aids](#)
- [Getting Started Quick Reference Guide](#)
- [Travelers Quick Reference Guide](#)

Other Resources

- [Web-based Tutorial](#)
- [Contact Us](#)

Support Center Page

Printable Job Aids

Printable Job Aids provide step-by-step instructions for essential procedures for FedTraveler.com end users. Printable Job Aids are intended to supplement the topics found in **Online Help**. You can print these job aids individually or as a complete reference guide.

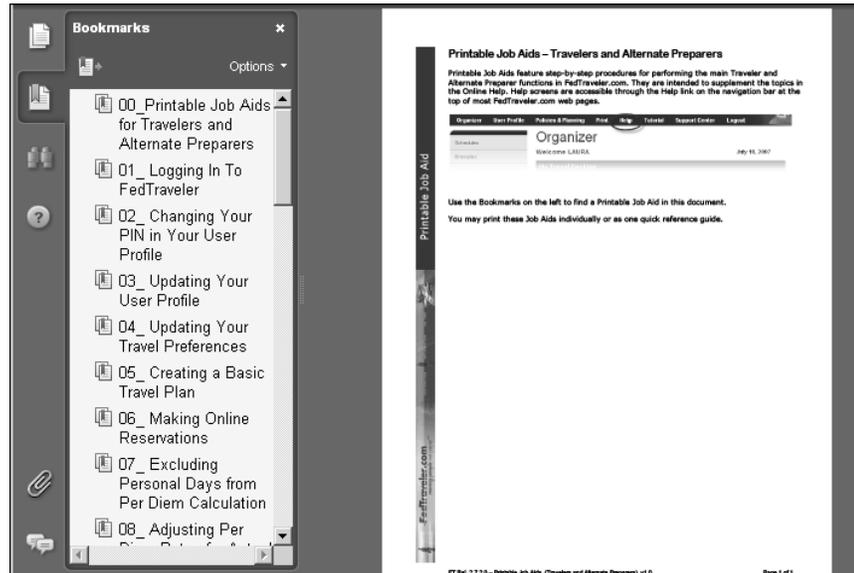
To access the Printable Job Aids:

1. Click the **FedTraveler.com Support Center** link located in the **Help & Support** box of the FedTraveler.com **Home** page.

*The **Support Center** page displays.*

2. Click the Traveler and Alternate Preparer Printable Job Aids link under User Guides in the Customer Support Resources box.

*The **Printable Job Aids** page displays in an Adobe Reader browser window.*



Printable Job Aids

3. Click the appropriate help topic.
4. To exit the Printable Job Aids, close the browser window by clicking on the red **X** in the upper right corner of the window, or by holding down the **Alt** key and pressing the **F4** key on the keyboard.

FedTraveler.com Tutorial

The Web-based tutorial teaches Travelers and Alternate Preparers how to create and submit a Travel Plan and an Expense Report. Features include background information, step-by-step procedures, and an overview of the main pages of FedTraveler.com.

To access the FedTraveler.com Tutorial:

1. Click the **Web-based Tutorial** link located under **Other Resources** in the **Customer Support Resources** box of the FedTraveler.com **Support Center** page.

The **Introduction** page of the Tutorial displays.



FedTraveler.com Tutorial Introduction Page

Tutorial **Navigation Bar**



Main Menu icon returns you to the FedTraveler.com Tutorial main menu



Help icon opens the tutorial **Program Layout** page



Return to the previous page



Go to the next page



Exit the tutorial and return to the FedTraveler.com **Home** page

2. Click the **Right Arrow** to continue to the next page.
*The **About this Tutorial** page displays.*
3. Click the **Right Arrow** to continue to the next page.
*The **Using this Tutorial** page displays.*
4. Click the **Right Arrow** to continue to the next page.
*The **Main Menu** displays.*
5. Click the appropriate lesson to open the sub-menu of available topics for that specific lesson.
6. Click the topic you want to learn about and follow the step-by-step instructions.
7. Click the **Exit** icon to return to the FedTraveler.com **Home** page.



Hint

Additional application help is available once you are logged on to FedTraveler.com. See the discussion of the Help function in the Navigation Bar later in this lesson.

Contact Us

FedTraveler.com user support issues may be communicated via voicemail or e-mail and will be answered promptly during normal business hours. During off-hours, calls are referred to the Travel Management Center (TMC) for emergency travel needs. See Appendix B for a definition of a TMC.

Emergency Travel Service provides reservation and ticketing support for travel needs that meet the following criteria:

- The call occurs after established business hours (contract defined) and
- The travel will commence within the following 24 hours or
- The need to travel arises over the weekend or during a holiday for travel that will commence over the weekend or on the next business day
- The Traveler cannot wait until the next business day to process reservations.

To access the **Contact Us** resource page, click the **Contact Us** link located under **Other Resources** in the **Customer Support Resources** box on the **Support Center** page. Call the phone number listed for your Agency.

FedTraveler.com Support Center

[Support Center Home](#) → [Call Center](#)

Still can't find the help you need in the FAQs? Do you need to talk to a call center representative?

Call Center Phone Numbers

Agency	Toll Free Number
Department of Homeland Security (DHS)	(800) 692-8014
Department of Housing and Urban Development (HUD)	(800) 748-2884
Department of Veterans Affairs (VA)	(800) 356-9513
Export-Import Bank (Ex-Im)	(800) 741-9438
Federal Trade Commission (FTC)	(800) 356-9511
National Science Foundation (NSF)	(800) 741-9943
Pension Benefit Guaranty Corporation (PBGC)	(800) 356-9512
All other Agencies	(866) 876-8020

Facsimile (800) 281-1787

eMail CallCenter@fedtravelersupport.com

Hours Monday through Friday 8:00 AM - 9:00 PM EST

During off hours:
 Calls are referred to the TMC for emergency travel needs. FedTraveler.com user support and technical support issues may be communicated via voice mail or email and will be answered promptly during normal business hours.

Information System Security

Name	Robert Wilchowski
Title	Chief Security Officer (CSO)
eMail	Robert.Wilchowski@eds.com
Work	(571) 330-3522

Name	Kim Whitman
Title	Information System Security Officer (ISSO)
eMail	Kim.Whitman@eds.com
Work	(703) 731-5971

Customer Support Resources

User Guides

- Traveler and Alternate Preparer Printable Job Aids
- Approver Printable Job Aids
- Getting Started Quick Reference Guide
- Travelers Quick Reference Guide

Other Resources

- Web-based Tutorial
- Contact Us

Contact Us Page

Logging In For the First Time

Before you are able to use FedTraveler.com, the system requires that you log in two separate times. The first log in will allow you to verify your e-mail address so that a temporary PIN can be sent to the e-mail address entered in your **User Profile**. It is important to verify that the e-mail address at the first log in is correct.



Hint

If you forget your PIN for a subsequent log in, enter your Member ID and then click the **Forgot your PIN?** link. Follow the instructions to have a new, temporary PIN e-mailed to you.



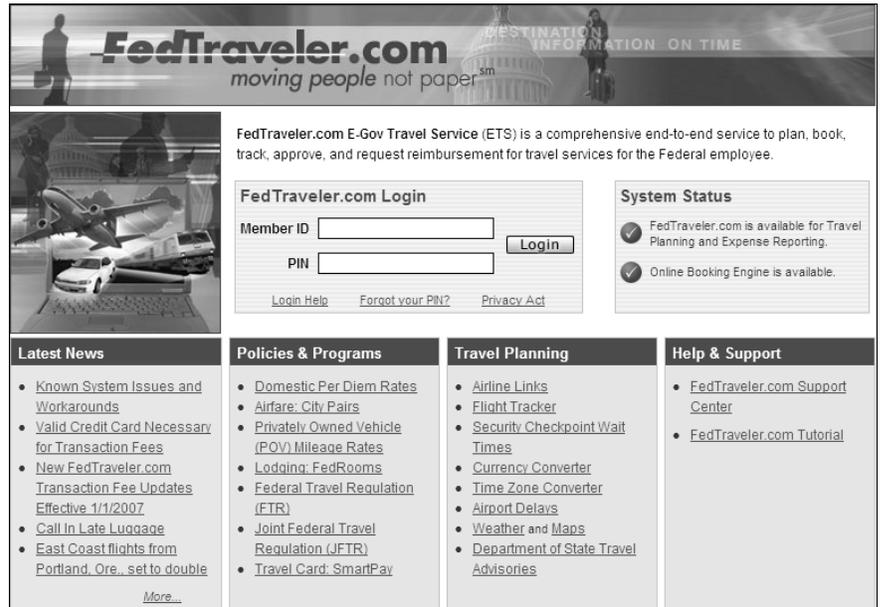
Hint

If you receive an **HTTP 500 – Internal Server Error** message when attempting to log in to FedTraveler.com, it may be because your browser has stored an older version of the Web page. Clear your browser's cache and delete your Internet cookies and then try logging in again. For assistance with this procedure, contact your IT department.

To log in for the first time and create your own PIN, do the following:

1. Open your Web browser and navigate to FedTraveler.com.

*The FedTraveler.com **Home** page displays in a new browser window.*

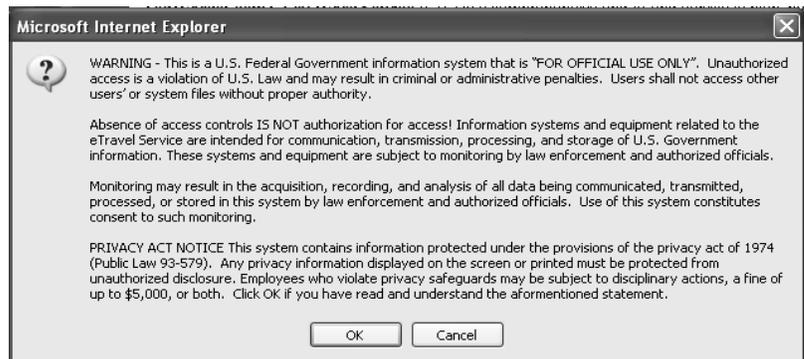


FedTraveler.com Home Page

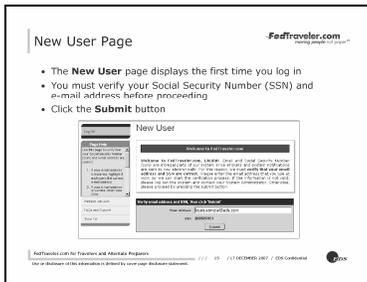
2. In the **FedTraveler.com Login** box, type your **Member ID** and initial **PIN**, and then click the **Login** button to begin the process of obtaining your temporary PIN.

Note: Defining the naming convention for Member IDs is up to the Agencies. Your System Administrator will provide you with your Member ID and initial PIN.

The "FOR OFFICIAL USE ONLY" and PRIVACY ACT NOTICE dialog box displays.



FOR OFFICIAL USE ONLY and PRIVACY ACT NOTICE Dialog Box



Slide 15: New User Page

3. Read the notice and click the **OK** button.

*The **New User** page displays in a new, full-screen browser window. From this point on, your browser navigation buttons and standard keyboard shortcuts are disabled, except for **Ctrl-P** (Print) and **Ctrl-R** (Refresh). You must use the navigation controls within FedTraveler.com.*

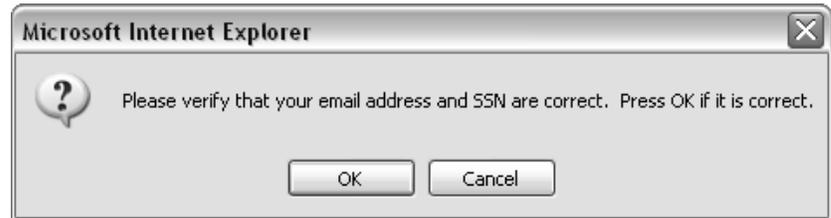
The screenshot shows the 'New User' page layout. On the left is a sidebar with 'Log Off', 'Page Help', 'Printable Job Aids', 'FAQs and Support', and 'How To'. The main content area has a 'Welcome to FedTraveler.com' header, followed by a detailed welcome message for 'LAURA' explaining the need to verify email and SSN. Below this is a 'Verify email address and SSN, then click 'Submit'' section with input fields for 'Email Address' (laura.sample@eds.com) and 'SSN' (200505151), and a 'Submit' button.

New User Page

4. Verify that your Social Security Number (SSN) and e-mail address are correct.

- a. If your SSN is incorrect, click the **Log Off** menu option, and then contact your System Administrator.
- b. If your SSN is correct, verify your e-mail address.
- c. If your e-mail address is correct, click the **Submit** button.
- d. If your e-mail address is incorrect, highlight it, type the correct e-mail address, and click the **Submit** button.

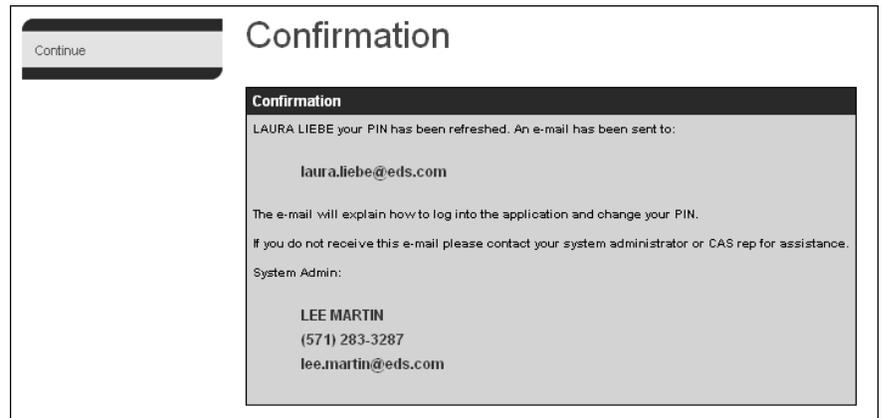
*The **e-mail address and SSN verification** dialog box displays.*



E-mail Address and SSN Verification Dialog Box

5. Click the **OK** button.

The **Confirmation** page displays, stating your PIN has been refreshed and sent to your e-mail address.



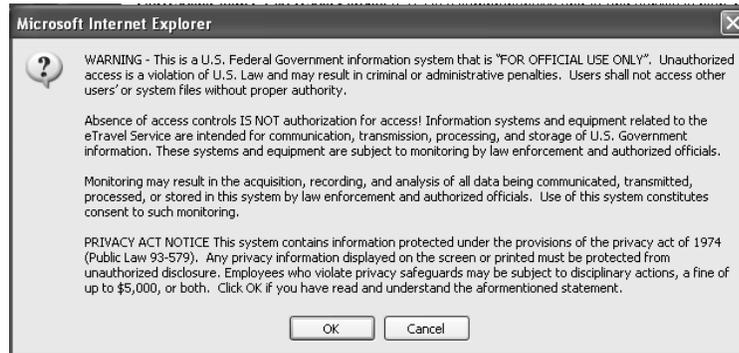
Confirmation Page

6. Click the **Continue** menu option to return to the Login page. You will be automatically logged off of FedTraveler.com. A new login page displays.

Note: FedTraveler.com will send a temporary PIN to your e-mail address. Retrieve your temporary PIN and use it to log in a second time.

7. After you have retrieved your PIN from your e-mail, return to the Login page.
8. Type your **Member ID** and temporary **PIN**, then click the **Login** button.

The **"FOR OFFICIAL USE ONLY"** and **PRIVACY ACT NOTICE** dialog box displays.



**FOR OFFICIAL USE ONLY and PRIVACY ACT NOTICE
Dialog Box**

9. Click the **OK** button.

*The **New User** page displays again, showing the **Welcome** message.*



New User Page



Hint

FedTraveler.com displays a warning message one minute before the system times out due to inactivity. When you respond to the warning message, the activity timer is reset and you can continue to work in FedTraveler.com without being logged out.

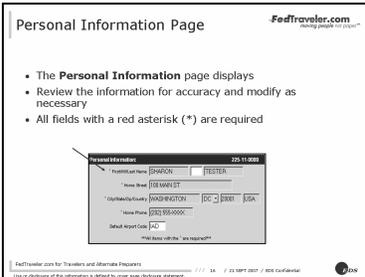
Activating Your User Profile

Once you have logged in with your Member ID and temporary PIN, the **New User** page displays. From here, activate your **User Profile**, including Personal, Financial, and Employment information needed for Travel Plans and Expense Reports.

To activate your **User Profile**, do the following:

1. After reading the **Welcome** message on the **New User** page, select the **Next** menu option.

*The **Personal Information** page displays.*



Slide 16: Personal Information

Personal Information: 225-11-0000

[^] First/MI/Last Name

[^] Home Street

[^] City/State/Zip/Country

[^] Home Phone

Default Airport Code

All items with the [^] are required!

Personal Information Page

Review your personal information for accuracy; modify as necessary.



Key Point

FedTraveler.com allows the use of hyphens in name fields; however, the Global Distribution System (GDS) does not. When making travel reservations, hyphens in name fields are replaced by a space. FedTraveler.com will remind you of this by displaying a message if a hyphen is entered in the **Last Name** or **First Name** field on the **Personal Information** page.

2. Click the **Next** menu option.

*The **Financial Information** page displays. You do not need to provide any required information on this page.*



Slide 17: Financial Information

Financial Information:

Bank Name

Bank Street

Bank City/State/Zip AL

ABA Routing Nbr.

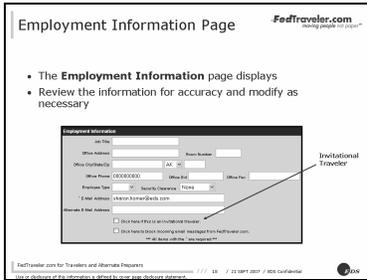
Bank Number

Account Type

Account Number

Web Address (Exp. <http://www.pncbank.com>)

Financial Information Page



Slide 18: Employment Information

3. Select the **Next** menu option.

The **Employment Information** page displays.

The screenshot shows the 'Employment Information' form with the following fields and options:

- Job Title: [Text Field]
- Office Address: [Text Field] Room Number: [Text Field]
- Office City/State/Zip: [Text Field] AK [Dropdown]
- Office Phone: 0000000000 Office Ext: [Text Field] Office Fax: [Text Field]
- Employee Type: [Dropdown] Security Clearance: None [Dropdown]
- E-Mail Address: sharon.homer@eds.com
- Alternate E-Mail Address: [Text Field]
- Click here if this is an invitational traveler.
- Click here to block incoming email messages from FedTraveler.com.

*** All items with the [^] are required ***

Employment Information Page

4. Review your employment information for accuracy; modify as necessary.



Key Point

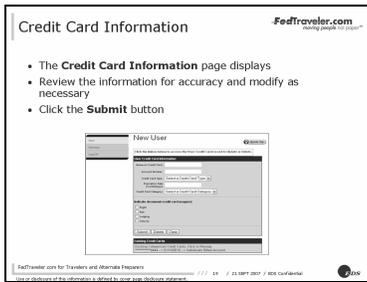
The **E-Mail Address** field on the **Employment Information** page is required in order to use the OBE. You receive approvals, notifications of changes to your travel reservations, and confirmations of your ticket purchases via the e-mail address entered in this field.

If an Alternate Preparer creates Travel Plans for you, use the **Alternate E-Mail Address** field to provide your Alternate Preparer’s e-mail address. You should also use this to provide your home or any public e-mail address that you can access via the Internet while traveling in case of important messages.



Watch Out!

Do not click the “**Click here to block incoming e-mail messages from FedTraveler.com**” box to block incoming e-mail because you will not receive e-mail notifications about approvals or changes to your Travel Plan.



Slide 19: Credit Card Information

5. Select the **Next** menu option.

*The **Credit Card Information** page displays.*

Credit Card Information Page

6. Review your credit card information for accuracy; modify as necessary.

- If no credit card is listed at the bottom of the page, fill in the credit card fields with your Individually Billed Account (IBA) or personal card information.
- If your IBA card number displays at the bottom of the page, click on it. The fields above it will then be filled in with the card information on file. Verify the credit card information, including expiration dates.
- If your Agency has a Centrally Billed Account (CBA), unchecked items will be charged to it.

Be sure to click the **Submit** button if you have made any changes.



Key Point

FedTraveler.com allows the use of hyphens in name fields; however, the Global Distribution System (GDS) does not. When making travel reservations, hyphens in name fields are replaced by a space. FedTraveler.com will remind you of this by displaying a message if a hyphen is entered in the **Name on Credit Card** field on the **Credit Card Information** page.



Watch Out!

At least one of the four credit card usage checkboxes *must* be checked for each credit card listed. If all the boxes are left unchecked, the card cannot be used in the reservation process.

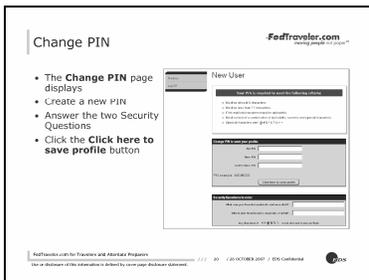


Watch Out!

Please check the expiration date of your credit card carefully. FedTraveler.com will accept an invalid expiration date (e.g. 02/31/2007), but will not save it correctly. If you attempt to save with an invalid expiration date, all of the details you enter on this page will be lost.

7. Select the **Next** menu option.

*The **Change PIN** page displays. You are required at this point to create a new PIN.*



Slide 20: Change PIN

Previous

Log Off

New User

Your PIN is required to meet the following criteria:

- Must be at least 8 characters.
- Must be less than 17 characters.
- First and last characters must be alphabetic.
- Must consist of a combination of alphabetic, numeric and special characters.
- Special characters are ! @ # \$ % ^ & * () > <

Change PIN to save your profile.

Old PIN

New PIN

Confirm New PIN

PIN example: ABC#123Z

[Click here to save profile](#)

Security Questions to enter

What was your favorite location to visit as a child?:

Who is your favorite actor, musician, or artist?:

Any character of < > @ & % * ; is not allowed in answer field.

Change PIN Page

The following table describes the requirements and parameters for creating a PIN:

PIN Requirements	
Requirements	Allowable Special Characters
PINs are case sensitive. PINs must be at least 8 but no more than 16 characters and a combination of alphabetic, numeric, and special characters. The first and last character must be alphabetic, e.g. Dog@12catcher. Numbers are not allowed in these positions. PINs expire in 90 days or less depending on your Agency's default setup. No more than three identical consecutive characters in any position from the previous password.	! Exclamation Point @ At sign # Pound sign \$ Dollar sign % Case & Ampersand (And) sign * Asterisk ^ Caret < Open Parenthesis > Close Parenthesis = Less Than sign = Greater Than sign
PINs may NOT contain <ul style="list-style-type: none"> Any dictionary word in any language Any proper noun or the name of any person, pet, child, or fictional character Any employee serial number, Social Security number, birth date, phone number, or any information that could be readily guessed about the creator of the password Any simple pattern of letters or numbers, such as the keyboard pattern, "qwerty", or "xyz123" Any word or name spelled backwards or appended with a single digit or with a two-digit "year" string, such as "98xyz123" 	

Slide 21: PIN Requirements

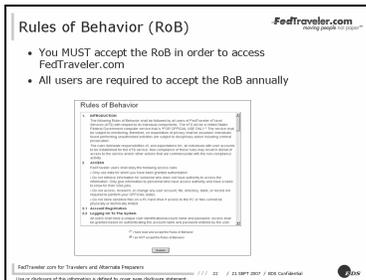
Requirements	Special Characters
PINs are case sensitive.	! Exclamation point
PINs must be at least eight but no more than 16 characters, and must include at least one number and one special character .	@ At sign # Pound sign \$ Dollar sign & Ampersand ('And') sign
The first and last character must be alphabetic, e.g. Dog@12catcher. Numbers are not allowed in these positions.	* Asterisk ^ Caret
PINs expire in 90 days or less depending on your Agency's default setup.	< Less than sign > Greater than sign
No more than three identical consecutive characters in any position from the previous password.	(Open Parenthesis) Close Parenthesis
PINs may NOT contain <ul style="list-style-type: none"> Any dictionary word in any language Any proper noun or the name of any person, pet, child, or fictional character Any employee serial number, Social Security number, birth date, phone number, or any information that could be readily guessed about the creator of the password Any simple pattern of letters or numbers, such as the keyboard pattern, "qwerty", or "xyz123" Any word or name spelled backwards or appended with a single digit or with a two-digit "year" string, such as "98xyz123" 	

8. Type your temporary PIN in the **Old PIN** field.
9. Type your new PIN in the **New PIN** field.
10. Retype your new PIN in the **Confirm New PIN** field.
11. In the **Security Questions** fields, fill in the answers to the two security questions.

Note: These answers will enable you to refresh your PIN using the **Forgot Your PIN?** link on the FedTraveler.com home page should you ever forget it. Make a note of your answers.

12. In the Save Profile box, click the **Click here to save profile** button.

The **Rules of Behavior** page displays.



Slide 22: Rules of Behavior



Rules of Behavior

1. INTRODUCTION

The following Rules of Behavior shall be followed by all users of FedTraveler eTravel Services (eTS) with respect to its individual components. The eTS will be a United States Federal Government computer service that is "FOR OFFICIAL USE ONLY." The service shall be subject to monitoring; therefore, no expectation of privacy shall be assumed. Individuals found performing unauthorized activities are subject to disciplinary action including criminal prosecution.

The rules delineate responsibilities of, and expectations for, all individuals with user accounts to be established for the eTS service. Non-compliance of these rules may result in denial of access to the service and/or other actions that are commensurate with the non-compliance activity.

2 ACCESS

FedTraveler users shall obey the following access rules:

- Only use data for which you have been granted authorization.
- Do not retrieve information for someone who does not have authority to access the information. Only give information to personnel who have access authority and have a need to know for their GSA jobs.
- Do not access, research, or change any user account, file, directory, table, or record not required to perform your OFFICIAL duties.
- Do not store sensitive files on a PC hard drive if access to the PC or files cannot be physically or technically limited.

2.1 Account Registration

2.2 Logging On To The System

All users shall have a unique User Identification/Account name and password. Access shall be granted based on authenticating the account name and password entered by the user.

I have read and accept the Rules of Behavior

I do NOT accept the Rules of Behavior

Submit

Rules of Behavior Page

13. After reading, select the **I have read and accept the Rules of Behavior** radio button and click the **Submit** button.

*The system takes you to the **Organizer** page; you can now start using FedTraveler.com.*

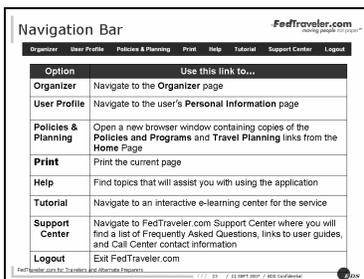
Using Common Page Elements

Common page elements include the **Navigation Bar** and menu options, which are the same for all FedTraveler.com users. The **Organizer** page, the starting point for all FedTraveler.com procedures, differs according to your FedTraveler.com role.



Watch out!

When you log in to FedTraveler.com, your browser navigation buttons and standard keyboard shortcuts are disabled, except for **Ctrl-P** (Print) and **Ctrl-R** (Refresh). You must use the navigation controls within FedTraveler.com.



Slide 23: Navigation Bar

Navigation Bar

The **Navigation Bar** on every FedTraveler.com page includes options that you use to move around the FedTraveler.com Web site.



Navigation Bar

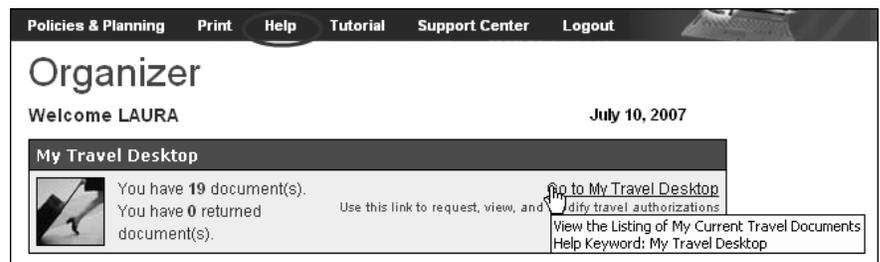
The following table describes the **Navigation Bar** options:

Option	Use this link to...
Organizer	Navigate to the Organizer page, which is the starting point for all procedures in the system. From the Organizer page you can access your My Travel Desktop, User Profile, Travel Preferences, the Reporting function (if you have that capability), Schedules, and Itineraries.
User Profile	Navigate to the user’s personal information page. User Profile contains specific information on each Traveler including Personal, Financial, Employment, Credit Card, Default, and Security Information.
Policies & Planning	Open a new browser window containing copies of the Policies & Programs and Travel Planning links from the Home page.
Print	Print the current page.
Help	Find topics that will assist you with using the application. See discussion below.
Tutorial	Navigate to interactive Web-based training for FedTraveler.com.
Support Center	Navigate to FedTraveler.com Support Center where you will find a list of Frequently Asked Questions, links to user guides, and Call Center contact information.
Logout	Exit FedTraveler.com

Application Help

Immediate help is provided for many of the buttons and links within FedTraveler.com. Mousing over a button or link reveals a useful keyword or phrase which may be used as a search term in the Help available in the **Navigation Bar**.

For example, mousing over the **Go to My Travel Desktop** link on the **Organizer** page reveals suggested Help keyword *My Travel Desktop*.



Help Keyword

To use the Help keyword, do the following:

1. Click the **Help** link in the Navigation Bar.

*The **Help** window displays.*



Help Window

2. Click the **Index** tab in the top left corner of the **Help** window.
3. Type the suggested Help keyword in the **keyword find** box.

The search function narrows the selection of topics in the Index column as you type until your keyword is matched exactly.

4. Click on the keyword at the top of the Index list (in the example given, **My Travel Desktop**) to see the help available displayed in the frame to the right of the Index.
5. Use the button **Click to see associated tasks** to pop up a task list.
6. Click a task in the list to see a detailed procedure for that task.

Organizer Page (for Travelers and Alternate Preparers)

The **Organizer** page is the starting point for accessing the main Web pages of the FedTraveler.com system, including the Online Booking Engine (OBE). From the **Organizer** page, you can access pages that allow you to create and manage Travel Documents, manage Traveler profiles, and access reporting functions. You can also download user support documentation.



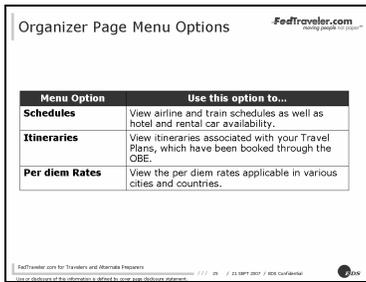
Slide 24: **Organizer** page

<ul style="list-style-type: none"> Schedules Itineraries Per diem Rates Leisure Travel 	<h2 style="margin: 0;">Organizer</h2> <p style="margin: 0;">Welcome LAURA July 9, 2007</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <h3 style="margin: 0;">My Travel Desktop</h3> <p style="margin: 0;">You have 16 document(s). Go to My Travel Desktop You have 0 returned document(s). <small>Use this link to request, view, and modify travel authorizations and vouchers.</small></p> </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <h3 style="margin: 0;">My Travel Profile</h3> <p style="margin: 0;">  <ul style="list-style-type: none"> • View/Update User Profile • View/Update Travel Preferences </p> </div> <div style="border: 1px solid black; padding: 5px;"> <h3 style="margin: 0;">Help and Support</h3> <p style="margin: 0;">  <ul style="list-style-type: none"> • Online Help • FedTraveler.com Support Center • FedTraveler.com Tutorial • Latest Traveler News & System Enhancement Announcements • FedTraveler.com Release Notice and Schedule </p> </div>
--	--

Organizer Page

Page Components

- **Navigation Bar** - options stay the same as you navigate to different FedTraveler.com pages
- **Page Name** - describes the Web page
- **Menu Options** - these differ among the types of users and change as you navigate to different pages
- **My Travel Desktop** - lists messages about the number of pending and returned Travel Documents
- **My Travel Profile** - links to view and update your profile (personal, financial, and employment information) and travel preferences (airline, car, and hotel preferences)
- **Help and Support** - contains links to Online Help, Support Center, and the Fed Traveler.com tutorial. This section also has links to the latest Traveler news, release notices, and maintenance schedules.

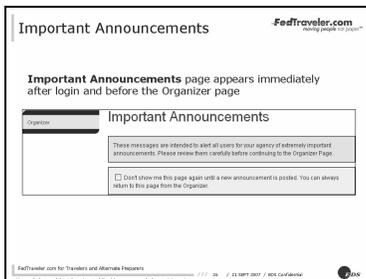


Slide 25: **Organizer** page
Menu Options

Menu Options

The following table describes some of the common menu options located on the **Organizer** page.

Menu Option	Application
Schedules	Shows airline and train schedules as well as hotel and rental car availability.
Itineraries	Lists itineraries associated with your Travel Plans, which have been booked through the OBE.
Per Diem Rates	Finds the per diem rates for various cities and countries.



Slide 26: **Important**
Announcements

Important Announcements

The **Important Announcements** page keeps you informed about new system features and changes.

Whenever a new announcement is posted, the **Important Announcements** page displays immediately after log in and before the **Organizer** page.

Important Announcements Page



The screenshot shows a web interface for 'Important Announcements'. On the left is a vertical menu with 'Organizer' selected. The main content area has a title 'Important Announcements' and two text boxes. The first box contains the text: 'These messages are intended to alert all users for your agency of extremely important announcements. Please review them carefully before continuing to the Organizer Page.' The second box contains a button labeled 'Don't Show After Login' followed by the text: 'Don't show me this page again until a new announcement is posted. You can return to this page from the Organizer.'

Important Announcements Page

Click the **Don't Show After Login** button if you only want to see new announcements. You can still re-read an active announcement by choosing **Important Announcements** on the **Organizer** page.

New announcements display below the checkbox shown above. Select the **Organizer** menu option to return to the **Organizer** page.



Watch out!

Announcements display only for a limited time before being removed. This time period is determined by your FedTraveler.com System Administrator.



Knowledge Check - Online Help

Use FedTraveler.com's online help resources to answer the next two questions. Write down which online resource you used and the location of the answer.

1. Unlike entering **User Profile** information, your Travel preferences are entered and retained by the _____ used by FedTraveler.com.

Where did you find the answer?

2. To create a Basic Travel Plan be prepared to provide the following information:
 - a.
 - b.
 - c.
 - d.
 - e.
 - f.

Where did you find the answer?



Knowledge Check

Circle the correct answer:

1. The first time you log in to FedTraveler.com you will need to verify:
 - a. Date and time
 - b. Your work location
 - c. Your e-mail address

2. The FedTraveler.com System Administrator activates a User's Profile.
 - a. True
 - b. False

3. When creating a PIN, you can use any dictionary word in any language.
 - a. True
 - b. False

4. Only Alternate Preparers must read and accept The Rules of Behavior for FedTraveler.com.
 - a. True
 - b. False

5. The Navigation Bar on every FedTraveler.com page includes options that you use to move around the FedTraveler.com Web site.
 - a. True
 - b. False



Slide 27: Lesson 2 Summary

Lesson 2 Summary

Having completed Lesson 2, you are now able to:

- Access and use the FedTraveler.com home page
- Identify and access online help and support resources
- Log in for the first time
- Activate your User Profile
- Identify common page elements
- Explain the Traveler's and Alternate Preparer's Organizer pages

This page intentionally left blank.

Lesson 3: Modifying and Managing User Profiles

Introduction

This lesson introduces you to managing your **User Profile** and travel preferences. It walks you through modifying your **User Profile**, entering travel preferences, and changing your PIN when necessary.

Lesson 3 Objectives

After completing this lesson, you will be able to:

- Identify the difference between the User Profile and the Travel Preferences
- Maintain your User Profile and Travel Preferences
- Change your PIN when required and define the guidelines for acceptable PINs

Lesson 3 Objectives

After completing this lesson, you will be able to:

- Identify the difference between **User Profile** and Travel Preferences
- Show you how to maintain your **User Profile** and Travel Preferences
- Instruct you on how to change your PIN when required and define the guidelines for acceptable PINs

Slide 28: Lesson 3 Objectives

Modifying Your User Profile

You must update your **User Profile** to reflect changes to your personal, employment, and credit card information. It is very important that you keep your e-mail address and credit card information up to date.

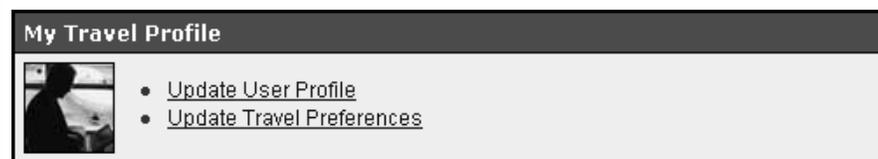


Watch out!

When you make changes to your **User Profile**, you must select the **Save Profile** menu option to save your changes.

To modify your **User Profile**, do the following:

1. On the **Organizer** page, click the **Update User Profile** link located in the **My Travel Profile** box.



*The **User Profile Personal Information** page displays.*

2. Enter new information or make any necessary corrections.
3. Proceed to other **User Profile** pages as necessary by selecting the corresponding menu button.
4. Enter new information or make any necessary corrections on the page.

If your Agency charges FedTraveler.com transaction fees to your personal card or IBA, you will not be able to delete the card from your User Profile until any Travel Plans which use those cards as the payment method are cancelled or the associated Expense Report has been completed.



Slide 29: Save Profile

5. When you are finished modifying your **User Profile**, select the **Save Profile** option.

The **Save Profile** and **Change PIN** boxes display.



6. In the **Save Profile** box, enter your PIN and click the **Click here to save profile** button.

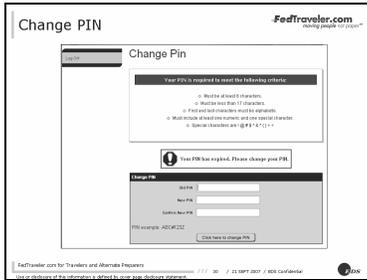
The **Organizer** page displays.

Changing Your PIN

There are four situations when you will need to change your PIN:

- At your initial log in
- When your PIN expires. Your Agency determines whether user PINs expire every 30, 60, or 90 days
- When you forget your PIN
- When you are locked out of the system because you have typed your PIN incorrectly three times

When you try to log in after your PIN has expired or you have been locked out of the system, the **Change PIN** page displays with a prompt to change your PIN.



Slide 30: Change PIN

Change Pin

Your PIN is required to meet the following criteria:

- Must be at least 8 characters.
- Must be less than 17 characters.
- First and last characters must be alphabetic.
- Must include at least one numeric and one special character.
- Special characters are ! @ # \$ % ^ & * () > <

Your PIN has expired. Please change your PIN.

Change PIN

Old PIN

New PIN

Confirm New PIN

PIN example: ABC#123Z

[Click here to change PIN](#)

Change PIN Page

The following table describes the parameters for creating a PIN:

Requirements	Special Characters
PINs are case sensitive.	! Exclamation point
PINs must be between eight and 16 characters and a combination of alphabetic, numeric, and special characters.	@ At sign
The first and last character must be alphabetic, e.g. Dog@12catcher. Numbers are not allowed in these positions.	# Pound sign
PINs expire in 90 days or less depending on your Agency's default setup.	\$ Dollar sign
No more than three identical consecutive characters in any position from the previous password.	& Ampersand ('And') sign
	* Asterisk
	^ Superscript sign
	< Less than sign
	> Greater than sign
	(Open Parenthesis
) Close Parenthesis
PINs may NOT contain <ul style="list-style-type: none"> • Any dictionary word in any language • Any proper noun or the name of any person, pet, child, or fictional character • Any employee serial number, Social Security number, birth date, phone number, or any information that could be readily guessed about the creator of the password • Any simple pattern of letters or numbers, such as the keyboard pattern, "qwerty", or "xyz123" • Any word or name spelled backwards or appended with a single digit or with a two-digit "year" string, such as "98xyz123" 	

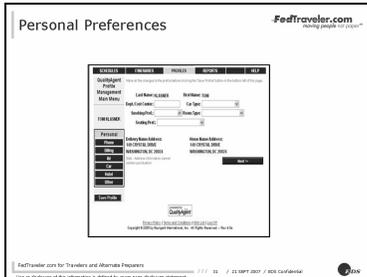
To change your PIN, do the following:

1. On the **Change PIN** page, enter your current PIN in the **Old PIN** field.
2. Type a new PIN in the **New PIN** field.
3. Retype your new PIN in the **Confirm New PIN** field.
4. Click the **Click here to change PIN** button to change PIN.

*If your new PIN is accepted, the **Organizer** page displays.*

Entering Your Travel Profile and Preferences

You can enter and store your travel preferences and frequent Traveler membership information on the **Profile Management** pages of the Online Booking Engine (OBE).



Slide 31: Personal Preferences

When you click **Update Travel Preferences** on the **Organizer** page, the first page to open is the **Personal** page where you will find the **Profile Management** Main Menu.

SCHEDULES	ITINERARIES	PROFILES	REPORTS	HELP
<p>QualityAgent Profile Management Main Menu</p> <p>Make all the changes to the profile before clicking the 'Save Profile' button on the bottom left of this page.</p> <p>Last Name: HAMMEL First Name: SERENA</p> <p>Dept./Cost Center: <input type="text"/> Car Type: <input type="text" value="Luxury Car"/></p> <p>Smoking Pref.: <input type="text" value="SMOKING"/> Room Type: <input type="text" value="King Bed"/></p> <p>Seating Pref.: <input type="text" value="Aisle Forward"/></p> <p>Delivery Name/Address: 100 MAIN ST WASHINGTON, DC 20010 Home Name/Address: 100 MAIN ST WASHINGTON, DC 20010</p> <p>Note - Address information cannot contain punctuation</p> <p><input type="button" value="Next >>"/></p> <p>Profile Management Main Menu Options</p> <p><input type="button" value="Save Profile"/></p> <p>powered by QualityAgent</p> <p>Privacy Policy Terms and Conditions Wish List Log Off</p> <p>©2006 Navigant International, Inc. dba Carlson Wagonlit Travel. All rights reserved. -- Rev 4.8 QualityAgent is a trademark of Navigant International, Inc. dba Carlson Wagonlit Travel</p>				

Profile Management Page

The **Personal** page is used to enter personal information about the Traveler. The Traveler's Last Name and First Name are required.

- Enter accounting information in the **Dept. Cost Center** box
- Select preferred car type from the **Car Type** dropdown menu
- Select smoking preference from the **Smoking Pref.** dropdown menu
- Select preferred hotel room-type from the **Room Type** dropdown menu
- Select airline seating preference from the **Seating Pref.** dropdown menu
- Delivery Address is read only
- Home address is read only



Hint

First Name and **Last Name** fields are automatically imported from Traveler's **User Profile**.

You may either click the **Next** button to proceed page by page through your profile, or select from the **Profile Management Main Menu**.

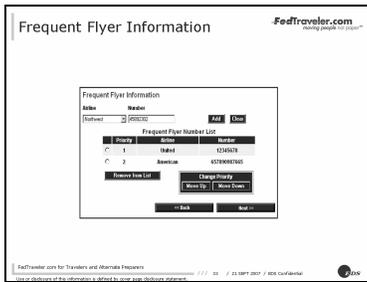
The following table describes the menu options and buttons located on the OBE **Profile Management Main Menu**:

Personal
Phone
Billing
Air
Car
Hotel
Other
Save Profile

Personal Preferences Menu Bar	
Menu Option	Use this option to...
Personal	Enter your preferences for airline seating, hotel room type, and rental car size.
Phone	Display the business, home, and fax phone numbers on record. This is a Read Only page. Changes to this information can only be made through User Profiles pages in FedTraveler.com.
Billing	Display a list of credit cards on record. This is a Read Only page.
Air	Enter your frequent flyer membership information, except for Southwest Airlines.
Car	Enter your preferred car rental company information or frequent renter discount.
Hotel	Enter your preferred hotel chain information or frequent guest discount.
Other	Enter special instructions and information such as passport number, special meal requests, and emergency contact information. Enter your Southwest Airlines Rapid Rewards membership number here.

Slide 32: Personal Preferences Menu Bar

Menu Option	Use this option to...
Personal	Enter your preferences for airline seating, hotel room type, and rental car size.
Phone	Display the business, home, and fax phone numbers on record. It is a Read Only page. Changes to this information can only be made through User Profiles pages in FedTraveler.com.
Billing	Display a list of credit cards on record. It is a Read Only page. Changes to this information can only be made through User Profiles pages in FedTraveler.com
Air	Enter your frequent flyer membership information except for Southwest Airlines (see Other).
Car	Enter your preferred car rental company information or frequent renter discount.
Hotel	Enter your preferred hotel chain information or frequent guest discount.
Other	Enter special instructions and information such as passport number, special meal requests, and emergency contact information. Enter your Southwest Airlines Rapid Rewards membership number here.



Slide 33: Frequent Flyer Information

Air

1. Click the **Next** button or the **Air** menu option.
2. On the **Frequent Flyer Information Profile** page, select the airline from the **Airline** dropdown list and type your corresponding membership number.
3. Click the **Add** button.

*The information is added to the **Frequent Flyer Number List**.*

Frequent Flyer Information

Airline **Number**

Northwest 45892302 **Add** **Clear**

Frequent Flyer Number List

	Priority	Airline	Number
<input type="radio"/>	1	United	12345678
<input type="radio"/>	2	American	657890987665

Remove from List

Change Priority
Move Up
Move Down

<< Back
Next >>

Frequent Flyer Information

4. Repeat steps 2 and 3 to add more Frequent Flyer memberships. When finished, go to step 5.
5. Re-prioritize the **Frequent Flyer Number List** by selecting the appropriate radio button and clicking the **Change Priority** buttons accordingly.

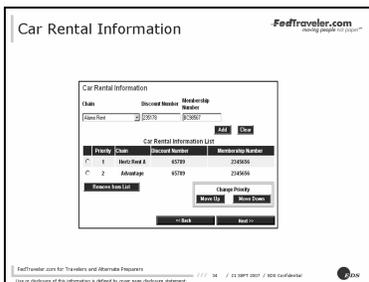
Car

1. Click the **Next** button or the **Car** menu option.

*The **Car Rental Information** page displays.*

2. Select the car rental chain from the **Chain** dropdown list and enter your discount and membership numbers.
3. Click the **Add** button.

*The information is added to the **Car Rental Information List**.*



Slide 34: Car Rental Information

Car Rental Information

Chain: Discount Number: Membership Number:

Car Rental Information List

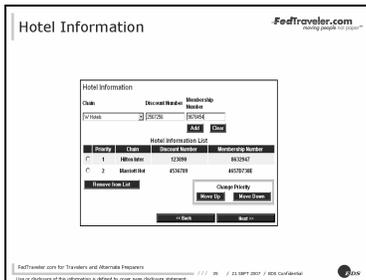
	Priority	Chain	Discount Number	Membership Number
<input type="radio"/>	1	Hertz Rent A	65789	2345656
<input type="radio"/>	2	Advantage	65789	2345656

Car Rental Information

- Repeat steps 2 and 3 to add more rental car memberships. When finished, go to step 5.
- Re-prioritize the **Car Rental Information List** by selecting the appropriate radio button and clicking the **Change Priority** buttons accordingly.

Hotel

- Click the **Next** button or select the **Hotel** menu option.
*The **Hotel Information** page displays.*
- Select the hotel chain from the **Chain** dropdown list and enter your discount and membership numbers.
- Click the **Add** button.
*The information is added to the **Hotel Information List**.*



Slide 35: Hotel Information

Hotel Information

Chain: Discount Number: Membership Number:

Hotel Information List				
	Priority	Chain	Discount Number	Membership Number
<input type="radio"/>	1	Hilton Inter	123890	8632947
<input type="radio"/>	2	Marriott Hot	4536789	4657D738E

Change Priority

Hotel Information

4. Repeat steps 2 and 3 to add more hotel frequent guest memberships. When finished, go to step 5.
5. Re-prioritize the **Hotel Information List** by selecting the appropriate radio button and clicking the **Change Priority** buttons accordingly.

Other

1. Click the **Next** button or select the **Other** menu option.
*The **Other** page displays.*
2. Enter one or more of the following in the free-form fields:
 - Special car and hotel instructions
 - E-mail address
 - Passport number
 - Miscellaneous instructions
 - Special airline seating and meal requests
 - Emergency contact name and number
 - Southwest Airlines' *Rapid Rewards*, AirTran Airways' *a+ Rewards*, and JetBlue's *True Blue* frequent flyer numbers

Save Profile

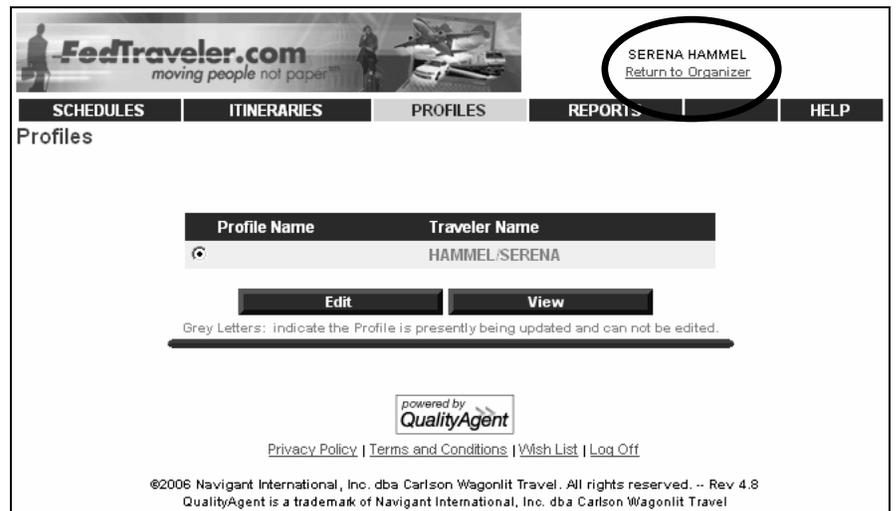
1. To save your entries, click the **Save Profile** button.

The **Confirm Save** dialog box displays.



2. To confirm that you are ready to save your profile, click the **OK** button.

The **Profiles** page displays with your travel profile listed.



Profiles Page

To exit, click the **Return to Organizer** link above the **OBE Navigation Bar**.



Knowledge Check – User Profile

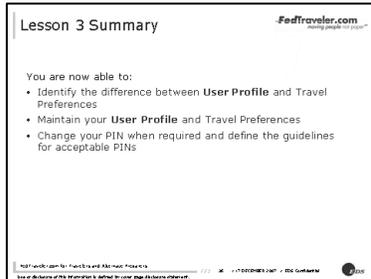
Follow the instructions below to complete this exercise.

1. Set up your **User Profile** using your specific information.
 - a. Enter only the required information on each page.
 - b. Leave the **Financial Details** page blank.
 - c. Leave the credit card number and name as it is, but make sure the **Expiration Date** is well in the future.
2. Set up your Travel Preferences.
 - a. Access travel preferences from the **Organizer** page.
 - b. Enter a frequent flyer number for US Airways.
 - c. Enter a frequent flyer number for Southwest Airlines.

Lesson 3 Summary

Having completed Lesson 3, you are now able to:

- Identify the difference between User Profile and Travel Preferences
- Maintain your User Profile and Travel Preferences
- Change your PIN when required and define the guidelines for acceptable PINs



Slide 36: Lesson 3
Summary

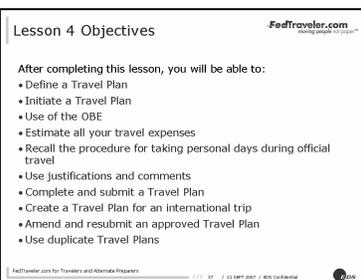
This page intentionally left blank.

Lesson 4: Creating Travel Plans

Lesson 4 Objectives

After completing this lesson, you will be able to:

- Define a Travel Plan
- Initiate a Travel Plan
- Use the OBE
- Estimate travel expenses
- Recall the procedure for taking personal days during official travel
- Use justifications and comments
- Complete and submit a Travel Plan
- Create a Travel Plan for an international trip
- Amend and resubmit an approved Travel Plan
- Use duplicate Travel Plans



Slide 37: Lesson 4 Objectives

Introduction

This lesson introduces the most common procedures in the Travel Plan process. You will learn how to create a basic Travel Plan, arrange travel, submit the plan, and amend it when necessary.

Special Travel Plans are discussed separately in Lesson 8.

Initiating a Travel Plan

Initiating a Travel Plan automatically creates a Travel Authorization Number that follows the Travel Plan to completion. The Travel Plan has three segments to include for a round trip:

1. Departure location, date, and time
2. Arrival location, date, and time
3. Return home, date, and time

My Travel Desktop Page

The **My Travel Desktop** page is the starting point for creating and amending all Travel Documents using the various Menu options. These Menu options enable you to initiate basic as well as special Travel Plans. It also allows the user to access several document control functions. All active Travel Documents are found under the **My Travel** tab.

To get to the **My Travel Desktop** page, click the **Go To My Travel Desktop** link in the **My Travel Desktop** box on the **Organizer** page.



My Travel Desktop

You have **16** document(s).
You have **0** returned document(s).

Use this link to request, view, and modify travel authorizations and vouchers.

[Go to My Travel Desktop](#)

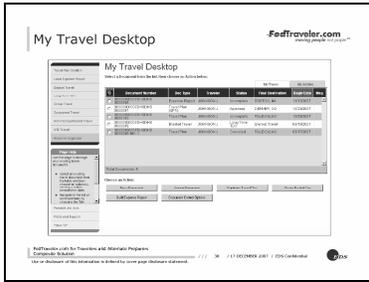


Watch Out!

The following message may appear when you click the **Go To My Travel Desktop** link:

"A script on this page is causing Internet Explorer to run slowly. If it continues to run, your computer may become unresponsive. Do you want to abort the script?"

If this message appears, click the **Yes** option. The **My Travel Desktop** will continue to load once Yes is selected.



Slide 38: My Travel Desktop

Travel Plan Creation

Local Expense Report

Blanket Travel

Long Term TDY

Group Travel

Sponsored Travel

Non-Fed Sponsored Travel

NTE Travel

Return to Organizer

Page Help

Use this page to manage your existing travel documents.

- Select an existing travel document from the table and then choose an action by clicking a button beneath the table.
- Navigate to the list of archived items by choosing the "My Archive" tab.

Printable Job Aids

FAQs and Support

"How To"

My Travel Desktop

Select a Document from the list, then choose an Action below:

					My Travel	My Archive
Document Number	Doc Type	Traveler	Status	Final Destination	Begin Date	Msg
<input type="radio"/> 0000000007DHS DHS 0000095	Expense Report	JOHNSON J	Incomplete	BOSTON, MA	11/12/2007	
<input type="radio"/> 0000000007DHS DHS 0000097	Travel Plan (SPN)	JOHNSON J	Approved	DENVER, CO	10/20/2007	
<input type="radio"/> 0000000007DHS DHS 0000103	Travel Plan	JOHNSON J	Incomplete	RALEIGH, NC	10/08/2007	
<input type="radio"/> 0000000007DHS DHS 0000089	Blanket Travel	JOHNSON J	Long Term TDY	Blanket Travel	09/10/2007	
<input type="radio"/> 0000000007DHS DHS 0000089-B01-1	Travel Plan	JOHNSON J	Canceled	RALEIGH, NC	09/17/2007	

Total Documents: 5

Choose an Action:

Open Document
Amend Document
Duplicate Travel Plan
Create Nested Trip

Build Expense Report
Document Control Options

My Travel Desktop Page

The document list on each tab of the **My Travel Desktop** page is scrollable and sortable by column. If you have more documents than there is room to show, a scroll bar will display to the right of the list. Click the title of any column to sort your documents by that column. Click the title again to reverse the sort order.

The number of documents listed is not limited except for the **My Archive Desktop**. Because of the possibility of a large number of documents in **My Archive Desktop**, a maximum of 150 documents can be viewed and sorted at one time, beginning with the most recent.

Watch Out!

Travel Documents that have been inactive for a period of 15 days since final action, or that have been approved and then deleted after a period of 15 days, should move to the My Archive Desktop page. Currently, this is not occurring.

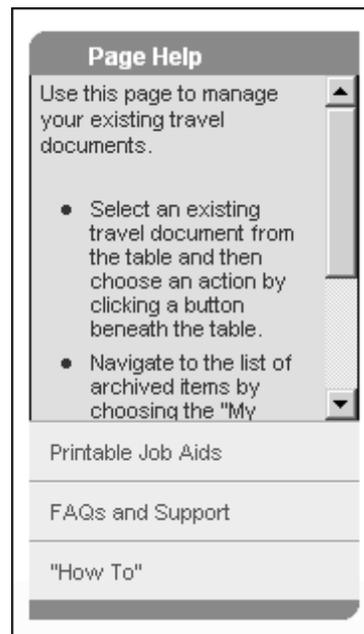


Page Help

Page Help includes helpful information and instructions on how to perform functions on the current page.

The following table describes the **Page Help** menu options:

Menu Button	Use this menu button to...
Printable Job Aids	Display a printable job aid that includes step-by-step instructions for performing functions on the current page.
FAQs and Support	Access the FedTraveler.com Support Center where you will find answers to Frequently Asked Questions and links to several online help resources.
"How To"	Access Online Help where you will find information and step-by-step instructions for essential functions in FedTraveler.com.



Example of Page Help on the My Travel Desktop Page

Menu Button	Use this menu button to...
Travel Plan Creation	Initiate a Travel Plan for yourself.
Local Expense Report	Initiate a Local Expense Report for yourself.
Blanket Travel	Initiate a Travel Plan for an extended period of time or a specific purpose, and may be limited by financial restrictions, to specific locations, and/or a select group of Travelers.
Long Term TDY	Initiate a Travel Plan for extended temporary duty assignment, usually for 30-180 days.
Group Travel	Initiate a Travel Plan for a group of two or more selected Travelers.
Sponsored Travel	Initiate a Travel Plan where travel expenses are partially or fully funded by a Federal entity other than the Traveler's.
Non-Fed Sponsored Travel	Initiate a Travel Plan where travel expenses are partially or fully funded by a non-Government organization.
NTE Travel	Initiate a Travel Plan to authorize travel for training only and restricted to a maximum amount for travel expenses.
Alternate Preparer	Initiate a Travel Plan on behalf of another Traveler.

Slide 39: My Travel Desktop Menu

The following table describes the menu options located on the left side of the **My Travel Desktop** page:

Menu Button	Use this menu button to...
Travel Plan Creation	Initiate a Travel Plan for yourself.
Local Expense Report	Initiate a Local Expense Report for yourself.
Blanket Travel	Initiate a Travel Plan for an extended period of time or a specific purpose. The trip may be limited by financial restrictions, to specific locations, and/or a select group of Travelers.
Long Term TDY	Initiate a Travel Plan for extended temporary duty assignment, usually for 30-180 days.
Group Travel	Initiate a Travel Plan for a group of two or more selected Travelers.
Sponsored Travel	Initiate a Travel Plan where travel expenses are partially or fully funded by a Federal entity other than the Traveler's.
Non-Fed Sponsored Travel	Initiate a Travel Plan where travel expenses are partially or fully funded by a non-Government organization.
NTE Travel	Initiate a Travel Plan to authorize travel for training only and restricted to a maximum amount for travel expenses.
Alternate Preparer	Initiate a Travel Plan on behalf of another Traveler.
Return to Organizer	Return to the Organizer page.

The following table describes the action buttons located at the bottom of the **My Travel Desktop** page.

Choose an Action:

Open Document	Amend Document	Duplicate Travel Plan	Create Nested Trip
Build Expense Report	Document Control Options		

Menu Options	Use this menu option to...
Open Document	Open a Travel Document with a status of Incomplete, Returned, or On Hold.
Amend Document	Open your approved Travel Plan or completed Expense Report for the purpose of correcting data previously reported in the document.
Duplicate Travel Document	Duplicate an existing Travel Plan for yourself or for another Traveler, intended for a trip that will occur past the current date.
Create Nested Trip	Select a Long Term TDY plan from the list of approved Travel Plans, then create a Nested Travel Plan for a single trip within the Long Term TDY.
Build Expense Report	Initiate an Expense Report from your approved Travel Plan to report all travel expenses and obtain reimbursement.
Document Control Options	Print or view a summary or history of a Travel Document; also to delete, submit, or put on hold documents with certain statuses.



Slide 40: Travel Plan Status Options

The following table describes the column headers in the **Travel Documents** list:

	Document Number	Doc Type	Traveler	Status	Final Destination	Begin Date	Msg
--	-----------------	----------	----------	--------	-------------------	------------	-----

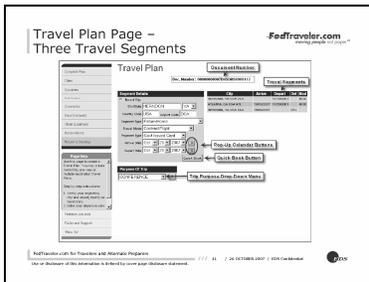
Column Header	Description
	Click this icon to deselect a radio button in this column and deselect the associated Travel Document.
Document Number	Lists the Document Numbers.
Doc Type	Describes the type of Travel Document.
Traveler	Lists the name of the Traveler associated with the Travel Document.
Status	Shows the current status of the Travel Document.
Final Destination	Shows the last city in the Traveler's trip itinerary.
Begin Date	States the first day of the Traveler's trip.
Msg.	Indicates that a Travel Document needs special handling. For example, an envelope icon may display next to a returned document indicating that an Approver has entered comments.

Travel Plan Page

When you initiate a basic Travel Plan, the **Travel Plan** page displays first. Menu options help you navigate through the various Web pages to enter the data necessary for a complete Travel Plan. The middle portion of the **Travel Plan** page is for entering segment details; the right side of the page lists the travel segments that you identify for the trip.

The screenshot shows the 'Travel Plan' page interface. On the left is a navigation menu with options: Cities, Countries, Rail Codes, Comments, Return to Desktop, Page Help, Step by step instructions (with a numbered list: 1. Verify your originating city and airport, modify as necessary. 2. Enter your departure date.), Printable Job Aids, FAQs and Support, and 'How To'. The main content area is titled 'Travel Plan' and features a 'Doc. Number: zzzzzzzzzzzzzzzzzzzzz0000468' field. Below this is a 'Segment Details' form with radio buttons for 'Round Trip' (selected) and 'One Way'. The form includes fields for City/State (CHANTILLY, VA), Country Code (USA), Airport Code (IAD), and Depart Date (Oct 15, 2007), with an 'Add' button. To the right of the form is a table header with columns: City, Arrive, Depart, Del, Mod. Below the form is a 'Purpose Of Trip' dropdown menu set to 'SELECT A PURPOSE' with a '?' icon.

Travel Plan Page



Slide 41: Travel Plan page - Three Travel Segments

Complete Plan

- Cities
- Countries
- Rail Codes
- Comments
- Days Excluded
- Other Expenses
- Reservations
- Return to Desktop

Page Help

Use this page to create a Travel Plan. You may create round trip, one way or multiple destination Travel Plans.

Step by step instructions:

1. Verify your originating city and airport, modify as necessary.
2. Enter your departure date

Printable Job Aids

FAQs and Support

"How To"

Travel Plan

Document Number
Doc. Number: 0000000007DHS0000112

Segment Details

Round Trip

City/State:

Country Code: Airport Code:

Segment Type:

Travel Mode:

Payment Type:

Arrive Date: Pop-Up Calendar Buttons

Depart Date: Quick Book Button

City	Arrive	Depart	Del	Mod
HERNDON, VA USA DCA		10/18/2007		MOD
ATLANTA, GA USA ATL	10/18/2007	10/20/2007		MOD
HERNDON, VA USA DCA	10/20/2007		DEL	

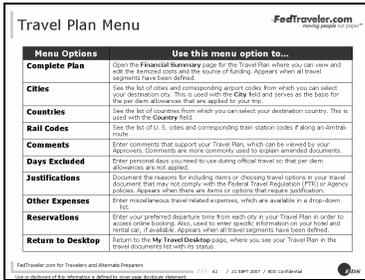
Purpose Of Trip

Trip Purpose Drop-Down Menu

Travel Plan Page with Three Travel Segments

Use or disclosure of this information is defined by cover page disclosure statement.

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Slide 42: Travel Plan Menu

The following table describes the available menu options located on the **Travel Plan** page once you have completed all segments for travel.

Menu Options	Use this menu option to...
Complete Plan	Open the Financial Summary page for the Travel Plan where you can view and edit the itemized costs and the source of funding. Displays when all travel segments have been defined.
Cities	See the list of cities and corresponding airport codes from which you can select your destination city. This is used with the City field and serves as the basis for the per diem allowances that are applied to your trip.
Countries	See the list of countries from which you can select your destination country. This is used with the Country field.
Rail Codes	See the list of U.S. cities and corresponding train station codes if along an Amtrak route.
Comments	Enter comments that support your Travel Plan, which can be viewed by your Approvers. Comments are required to explain Amended documents.
Days Excluded	Enter personal days you need to use during official travel so that per diem allowances are not applied.
Justifications	Document the reasons for including items or choosing travel options in your Travel Document that may not comply with the Federal Travel Regulations or Agency policies. Displays when there are items or options that require justification.
Other Expenses	Enter miscellaneous travel related expenses, which are available in a dropdown list.
Reservations	Enter your preferred departure time from each city in your Travel Plan in order to access online booking. You can also enter specific information on your hotel and rental car, if available. This page displays when all travel segments have been defined.
Return to Desktop	Return to the My Travel Desktop page, where you see your Travel Plan in the Travel Documents list with its status.

To create a basic Travel Plan, you will need to know the dates and the destination(s) for the trip. It is also important to have the reason for the trip.

A Travel Plan is made up of travel segments. Segments are defined by city. For example, you leave from Baltimore, MD, to attend a three-day conference in Chicago, IL. After the conference, you return to Baltimore. Baltimore (departure city) is segment one. Chicago (destination) is segment two. Baltimore (return home) is segment three.

In a simple, one-destination, round trip Travel Plan, there should be a minimum of three cities in the segment details table: your originating city, the destination city, and your return to the city where you originated the trip.

Entering Travel Segments

The first step to creating a Travel Plan is to list all your travel segments from point of origin (home city) to final destination. If planning round-trip travel, your final destination is your home city. If your travel is one-way, your last destination city is your final destination.

A *segment* as used in FedTraveler.com is defined differently from the way the term is commonly used in the travel industry. Airlines and travel agents commonly use the terms *segment* and *leg* interchangeably. A *leg* is a part of a trip, usually in reference to an air itinerary, such as the “outbound leg” or the “return leg.” One take-off and one landing during air travel constitutes a *segment*.

In FedTraveler.com, however, a *segment* is defined by city and airport—the departure city and airport, the arrival city and airport, the “return home” city and airport—regardless of whether actual travel involves a nonstop flight, connecting flights, or a combination of auto and air travel to get from one city to the other. Segments of a trip are entered city by city.



Hint

Be ready to provide times and dates for each segment, destination city/airport, payment type, and purpose of travel. Be familiar with your Agency-approved travel modes and segment types.

Follow this procedure to enter travel segments:

1. On the **My Travel Desktop** page, click the **Travel Plan Creation** menu option.

*The **Travel Plan** page displays with the Traveler's originating City, State, and Airport code already populated based on information in the **User Profile**.*

2. If there is no airport code or you are originating from a different city, type the first few letters of the city name in the **City** field.

3. Click the **Cities** menu option.
4. In the **Cities** list, click the link for the correct **City-Airport** code combination.

You can enter cities and airport codes manually. You can also use the Cities menu option to find and enter the airport from which you want to fly, and then change the departure city and state manually.

5. In the **Segment Details** box, verify that the correct city name, state abbreviation, and airport code are entered.
6. In the **Depart Date** fields, select the month, day, and year from the dropdown lists.



Hint

To use the Pop-Up Calendar feature, click the **Calendar** icon next to the date fields. Find and select your travel date and then click the **Choose this date** link. The **Depart Date** fields in the **Segment Details** box are automatically populated.

7. In the **Purpose of Trip** field, select the purpose from the dropdown list.
8. Click the **Add** button.

The originating city displays in the list to the right of the **Segment Details** box. To make corrections, click the **MOD** link next to the originating city.

9. In the **Segment Details** box, type the first few letters of your destination city in the **City** field.
10. Click the **Cities** menu option.
11. In the **Cities** list, click the link for the correct **City-Airport** code combination.



Watch Out!

It is important that you select or enter your exact destination city and state, no matter which airport you are flying into, because per diem rates for your Travel Plan are calculated from the City/State fields.

For example, if you are traveling to Manhattan in New York City, be sure to select Manhattan in the **Cities** list, because it has a higher per diem rate than the other boroughs of New York.

You can enter cities and airport codes manually. You can also use the Cities menu option to find and enter the city you want to travel to, and then change the airport code manually.

To find an airport code, click the **Help** link in the Navigation Bar. In the **Help** window, click **Airport Codes by City**, and then click the first letter of the city which contains the airport code for which you are looking. Select and copy the airport code from **Help**, and paste it into the **Airport Code** field in the **Segment Details** box.

12. In the **Segment Details** box, verify that the correct city name, state abbreviation, and airport code are entered



Key Point

If you are traveling to a city outside the U. S., the **State** field should display the code **FC** (for **F**oreign **C**ountry). See the section on *Foreign Travel* in this Lesson for more details.

13. In the **Segment Type** field, select the appropriate description for this segment from the dropdown list.

The following table describes the **Default Segment Types**:

Segment Type Menu	
Return Home	The last segment type, to plan a return trip to the point of origin or home base.
End of Trip	The last segment type when planning one-way travel.
Include Meals & Lodging	For normal segments when full per diem for food, incidentals, and lodging is being used for a segment.
Actual Necessary 150%	Used when the cost of lodging exceeds the normal per diem for a given travel destination by up to 150%.
Actual Necessary 300%	Used when the cost of lodging exceeds the normal per diem for a given travel destination by up to 300%.
Shared Lodging	Used when two or more people will share the expense of the hotel room.
No Lodging/No Meals	For a trip where the Traveler is provided lodging and meals but can claim incidentals only.
Registration w/out Meals	For trips where the meals are included with the cost of the lodging, typically for conferences where the cost of the meals are included with the cost of the registration.
Travel w/out Lodging	To indicate when the Traveler is arranging for private lodging (such as with family or friends) and will not be using the per diem for lodging.
Travel w/out Meals	Denotes travel that requires a lodging per diem, but not a meal per diem because the Traveler may be getting meals with friends or family, or it may be included with other expenses.
Conference (125% of Lodging)	Used when the cost of lodging is dictated by the conference location and is higher than the normal per diem for lodging at a specific location.
Rest Stop	Used if travel exceeds 12 hours and premium travel has not been authorized such as Business Class or First Class.
No Per Diem	Used when the Traveler is not claiming per diem because they are doing personal travel in the middle of a business trip and cannot claim incidentals.
Convention (Not 100%)	Used when the user is specifying that they are going through a particular routing, for example SFO-LAX-SFO - stopping in LA on the way to SFO.
20% M&IE First in Last	Adjusted allowance for the first and last day of travel. Calculated automatically.
Rest Stop	Used for long drives for travel when creating an online Expense Report.
<small> FedTraveler.com for Travelers and Alternate Preparers © 2010 Department of the Interior, Bureau of Land Management. All rights reserved. // 43 // 12/18/2010 // 80% Confidential </small>	

Slide 43: Segment Type Menu

Menu Options	Purpose/Function
Return Home	Used as the last segment type, to indicate a return trip to the point of origin or home base for a round trip.
End of Trip	The last segment type when planning one-way travel. Requires justification.
Include Meals & Lodging	For normal segments when full per diem for food, incidentals, and lodging is charged.
Actual Necessary 150%	Used when the cost of lodging or M&IE exceeds the normal per diem for a given travel destination by up to 150%. Requires justification.
Actual Necessary 300%	Used when the cost of lodging or M&IE exceeds the normal per diem for a given travel destination by more than 150% up to 300%. Requires justification.
Shared Lodging	Used when two or more people will share the expense of the hotel room.
No Lodging/No Meals	Used for a trip where the Traveler is provided lodging and meals but can claim incidentals.
Registration w/out Meals	Used for trips where the meals are included with the cost of the lodging, typically for conferences where the cost of the meals is included with the cost of the registration.
Travel w/out Lodging	Used when the Traveler is arranging for private lodging (such as with family or friends) and will not be using the per diem for lodging.
Travel w/out Meals	Denotes travel that requires a lodging per diem, but not a meal per diem. The Traveler may be getting meals with friends or family or they may be included with other expenses.
Conference (125% of Lodging)	Used when the cost of lodging is dictated by the conference location, and is higher than the normal per diem for lodging at a specific location.
Rest Stop	Used if travel exceeds 12 hours and premium travel (Business Class or First Class) has not been authorized.
No Per Diem	Used when the Traveler is not claiming per diem because he or she is taking personal time within a business trip.

Menu Options	Purpose/Function
Connection (Not TDY)	Used when the Traveler wants to specify a particular routing, such as IAD-LAX-SYD (from Washington Dulles Airport to Sydney, going through Los Angeles)
75% M&IE First & Last Only	Adjusted allowances for the first and last day of travel. Calculated automatically.
End Voucher	Used for long-term TDY travel when creating an interim Expense Report.

14. In the **Travel Mode** field, select the transportation mode for this segment from the dropdown list.

See *Using Constructive Travel* in Lesson 7 for more information on Privately Owned Vehicle (POV) travel mode.

The following table describes the **Default Travel Types**:

Menu Options	Purpose/Function
Privately Owned Vehicle (POV)	Used when a personal vehicle (including motorcycle and private plane) is used as the mode of transportation. A Constructive Travel Plan must be created to prove that this is cost savings for the Government.
Boat	Used when a boat is the form of transportation to a destination.
Bus	Used to book and pay for a bus as the form of transportation.
Commercial Flight	Used if the flight is not a contract flight because the destination is not part of the City Pair program. Contract Flight should be chosen whenever possible.
Contract Flight	Federal Travelers on official business are required to use the contract carrier unless a specific exception applies.
First Class	A travel mode that must be approved prior to booking the flight as it does not conform to Government rules.
Govt Boat	A Government provided boat. Requires prior approval.
Govt Car	A Government provided car. Requires prior approval.
Govt Plane	A Government provided plane. Requires prior approval.
Rental Car	Used when it is less expensive than flying to a destination. Generally, rental cars are part of the Travel Plan and the user is responsible for the use agreement at the destination.
Train	Used for a U.S. city where flying over to the nearest airport is not convenient to the reach location of the destination. This mode is used in conjunction with the bus option when using both modes.
Walk Pilot	Used to reach remote destinations that are not served by other forms of transportation.
Unaccompanied	Used to reach remote destinations that are not served by other forms of transportation.
Unmanned	Used to reach remote destinations that are not served by other forms of transportation.
Sea Plane	Used to reach remote destinations that are not served by other forms of transportation.
Helicopter	Used to reach remote destinations that are not served by other forms of transportation.
Govt Vessel	Chosen if the type of Government transport is other than a car, boat, or plane.
Business Class	A travel mode that must be approved prior to booking the flight as it does not conform to Government rules.

Slide 44: Default Travel Types

Menu Options	Purpose/Function
Privately Owned Vehicle (POV)	Used when a personal vehicle (including motorcycle and private plane) is the mode of transportation. A Constructive Travel Plan must be created to prove that this is cost effective for the Government.
Boat	Used when a boat is the form of transportation to a destination.
Bus	Used to book and pay for a bus as the form of transportation.
Commercial Flight	Used if the flight is not a contract flight because the destination is not part of the City Pair program. Contract Flight should be chosen whenever possible.
Contract Flight	This is the default. Federal travelers on official business are required to use a contract carrier unless a specific exception applies, such as OCONUS travel.

Menu Options	Purpose/Function
First Class	A travel mode that must be approved before booking the flight as it does not conform to Government rates.
Govt Boat	A Government-provided boat. Requires prior approval.
Govt Car	A Government-provided car. Requires prior approval.
Govt Plane	A Government-provided plane. Requires prior approval.
Rental Car	Used when it is less expensive than flying to a destination. Generally, rental cars are not used to get to a destination, but used upon arrival at the destination.
Train	Used for a U.S. city where flying to the nearest airport is not convenient to the exact location of the destination. This selection must be used in conjunction with the Rail option when using online booking.
Bush Pilot	Used to reach remote destinations that are not served by other forms of transportation.
Snowmobile	Used to reach remote destinations that are not served by other forms of transportation.
4-Wheeler	Used to reach remote destinations that are not served by other forms of transportation.
Sea Plane	Used to reach remote destinations that are not served by other forms of transportation.
Helicopter	Used to reach remote destinations that are not served by other forms of transportation.
Govt Vessel	Chosen if the type of Government transport is other than a car, boat, or plane.
Business Class	A travel mode that must be approved before booking the flight since it does not conform to Government rates.

15. In the **Arrive Date** fields, enter the date that you are arriving in this destination city.
16. In the **Depart Date** fields, enter the date that you are departing from this destination city.
17. Verify that the **Purpose of Trip** is correct; change as necessary.
18. Click the **Add** button.

*The destination city displays in the travel segments table below your originating city. To make any corrections, click the **MOD** link next to the city. You can also click the **DEL** link, if available, to start over.*

19. To add more destinations, repeat steps 9 to 18. When ready to book your return home segment, go to step 21.
20. In the **Segment Details** box, verify that your home city, state, and airport code are correct. If there are any inaccuracies, change the fields accordingly (see steps 9 to 12).
21. In the **Segment Type** field, select **Return Home** from the dropdown list.
22. Verify that your **Travel Mode** and **Payment Type** are correct; change as necessary.
23. In the **Depart Date** fields, enter the date that you are departing from the last destination city.
24. In the **Arrive Date** fields, enter the date that you are arriving in your home city.
25. Click the **Add** button.

*Your home city displays as the last city in the travel segments table below your last destination city. To make any corrections, click the **MOD** link next to the city. You can also click the **DEL** link to start over.*



Watch Out!

If the Centrally Billed Account (CBA) for your organization has expired, the system displays the following message: "Your Government Travel Card has expired. The Transaction Fee is being charged to the Government Travel Card. Please contact your system Administrator to update the Government Travel Card."

This message does not apply to your Individually Billed Account (IBA) card. Please contact your System Administrator to request the information for the CBA be updated.

26. Click the **Reservation** menu option to begin making your reservations.

Trips Less Than 12 Hours

Follow these steps to enter travel segments for a trip lasting 12 hours or less:

1. Enter travel segments as instructed in **Entering Travel Segments** above.
2. After adding the **Return Home** travel segment, select the **Check here if trip is 12 hours or less** check box.

City	Arrive	Depart	Del	Mod
CHANTILLY, VA USA IAD		11/05/2007		MOD
BOSTON, MA USA BOX	11/05/2007	11/05/2007		MOD
CHANTILLY, VA USA IAD	11/05/2007		DEL	

Travel Plan Page

3. Click the **Reservation** menu option to begin making your reservations.

Reservations

Off Line Document Number ZZZZZZZZZZZZZZZ000047400000

Segment 1

Depart CHANTILLY, VA IAD 11/05/2007

Arrive BOSTON, MA BOX 11/05/2007

Airline -None- Flight # Air Fare

Ticket # Seat #

Rail # Rail Cost

Rental Car Quoted Daily Rcar Cost

Rental Car Size None Daily Rental Car Cost

Rcar Confirm # Total Est Rcar Cost (Includes Tax & Fees)

Pay Method Govt Issued Card

Travel Mode Contract Flight

Max Lodging \$0.00 Max M&IE \$0.00

Reservations Page

Because you selected the **Check here if trip is 12 hours or less** checkbox, the Max Lodging and Max M&IE amounts on the **Reservations** page are set to \$0.00.

Watch Out!

Currently, when a Traveler creates a Travel Plan for a one-day trip and selects the **Check here if trip is 12 hours or less** box to indicate that the trip is less than 12 hours, the system correctly sets the **Max Lodging** to \$0.00 on the **Reservations** page. If the Traveler then modifies the Travel Plan by adding an additional day, the system does not recognize this action and the **Max Lodging** amount remains at \$0.00.

If there are no reservations associated with the document, cancel the existing Travel Plan and create a new Travel Plan without selecting the **Check here if trip is 12 hours or less** checkbox. If there are reservations associated with the document, you need to contact the FedTraveler.com Call Center for a data adjustment.

Land Segments

A land segment is used when a Traveler travels from one city to another (or one per diem location to another) without using the travel mode of Contract Flight or Train. Privately Owned Vehicle and Rental Car are the most common Travel Modes for land segments.

A Traveler who flies to an intermediate city and stays overnight before driving or being driven to his or her final destination would use a land segment to account for the overnight stay and the extra day of M&IE necessary.



Key Point

Travel from home to the airport and from the airport to home should not be added as separate travel segments. Instead, the mileage should be expensed using **Mileage** under **Other Expenses**.

When there are two or more consecutive land segments, the data returned from the OBE may incorrectly update the segment dates or airport codes on the Travel Plan. In those cases, it may be necessary to modify the various segments to correct dates and airport codes.

The following scenarios will clarify the issue of when to include a land segment in your Travel Plan, and when not to include one.

Scenario 1

Basic trip from Brunswick, GA, to Artesia, NM, and back—no land segments needed

1. Traveler drives personal vehicle or takes taxi from home to the Brunswick, GA, airport on November 5.
2. Traveler flies from Brunswick, GA, to El Paso, TX, through one or more connections, arriving November 5.

3. Traveler picks up rental car in El Paso and drives directly to Artesia, NM, the same day.
4. Traveler stays in Artesia for 4 nights, from November 5 to November 9.
5. Traveler drives back to El Paso, drops off the rental car, and flies back to Brunswick on November 9.
6. Traveler drives home in personal vehicle from the Brunswick airport on November 9.

Scenario 1 in FedTraveler.com

First segment

Enter home city and state, airport code, departure date and purpose of trip.

The screenshot shows the 'Travel Plan' interface. On the left is a navigation menu with options: Cities, Countries, Rail Codes, Comments, and Return to Desktop. Below the menu is a 'Page Help' section with instructions on how to use the page. The main area is titled 'Travel Plan' and contains a 'Doc. Number' field with the value 'ZZZZZZZZZZZZZZZZ0000477'. Below this is the 'Segment Details' section, which includes radio buttons for 'Round Trip' (selected) and 'One Way'. It has input fields for 'City/State' (BRUNSWICK, GA), 'Country Code' (USA), and 'Airport Code' (BQK). The 'Depart Date' is set to Nov 5, 2007. An 'Add' button is located below these fields. To the right of the 'Segment Details' is a table with columns: City, Arrive, Depart, Del, and Mod. Below the 'Segment Details' is the 'Purpose Of Trip' section, which has a dropdown menu set to 'SITE VISIT' and a '?' button.

Scenario 1: First Segment

Second segment

Enter final destination city and state (Artesia, NM), airport code for nearest airport (El Paso, TX – ELP), and arrival and departure dates. Travel mode is **Contract Flight**.

Cities

Countries

Rail Codes

Comments

Other Expenses

Return to Desktop

Page Help

Use this page to create a Travel Plan. You may create round trip, one way or multiple destination Travel Plans.

Step by step instructions:

1. Verify your originating city and airport, modify as necessary.
2. Enter your departure

Printable Job Aids

Travel Plan

Doc. Number: ZZZZZZZZZZZZZZZZZZZ0000477

Segment Details

Round Trip

City/State: ARTESIA NM

Country Code: USA Airport Code: ELP

Segment Type: Include Meals & Lodging

Travel Mode: Contract Flight

Payment Type: Govt Centrally Billed

Arrive Date: Nov 5 2007

Depart Date: Nov 9 2007

Add

City	Arrive	Depart	Del	Mod
BRUNSWICK, GA USA BQK		11/5/2007		MOD

Purpose Of Trip

SITE VISIT

Scenario 1: Second Segment

Third and final segment

Enter home city and airport code. Segment type is **Return Home**; Travel Mode is **Contract Flight**.

Complete Plan

Cities

Countries

Rail Codes

Comments

Days Excluded

Other Expenses

Reservations

Return to Desktop

Page Help

Use this page to create a Travel Plan. You may create round trip, one way or multiple destination Travel Plans.

Step by step instructions:

Travel Plan

Doc. Number: ZZZZZZZZZZZZZZZZZZZ0000477

Segment Details

Round Trip

City/State: BRUNSWICK GA

Country Code: USA Airport Code: BQK

Segment Type: Return Home

Travel Mode: Contract Flight

Payment Type: Govt Centrally Billed

Arrive Date: Nov 9 2007

Depart Date: Nov 9 2007

Quick Book

City	Arrive	Depart	Del	Mod
BRUNSWICK, GA USA BQK		11/05/2007		MOD
ARTESIA, NM USA ELP	11/05/2007	11/09/2007		MOD
BRUNSWICK, GA USA BQK	11/09/2007		DEL	

Purpose Of Trip

SITE VISIT

Scenario 1: Third Segment

Scenario 2

Trip from Brunswick, GA, to Artesia, NM, with an overnight stay in El Paso, TX, on the outbound leg - one land segment needed.

1. Traveler drives personal vehicle (POV) or takes taxi from home to the Brunswick airport on November 5.
2. Traveler flies from Brunswick to El Paso through one or more connections, arriving on the same day.
3. Traveler spends the night of November 5 in El Paso.
4. Traveler drives to Artesia on November 6. *A land segment is needed to move the traveler from El Paso to Artesia.*
5. Traveler stays in Artesia for three nights, from November 6 to November 9.
6. Traveler drives back to El Paso, drops off the rental car, and flies back to Brunswick on November 9.
7. Traveler drives home in personal vehicle from the Brunswick airport on November 9.

Scenario 2 in FedTraveler.com

First segment

Enter home city and state, airport code, departure date, and purpose of trip.

The screenshot shows the 'Travel Plan' interface. On the left is a navigation menu with options: Cities, Countries, Rail Codes, Comments, Return to Desktop, and Page Help. The 'Page Help' section contains instructions: 'Use this page to create a Travel Plan. You may create round trip, one way or multiple destination Travel Plans. Step by step instructions: 1. Verify your originating city and airport code.' The main area is titled 'Travel Plan' and includes a 'Doc. Number: ZZZZZZZZZZZZZZZ0000478'. Below this is the 'Segment Details' form with the following fields:

- Round Trip (selected) / One Way
- City/State: BRUNSWICK GA
- Country Code: USA / Airport Code: IAD
- Depart Date: Nov 5 2007
- An 'Add' button is located below the date field.

 Below the 'Segment Details' form is the 'Purpose Of Trip' section with a dropdown menu set to 'SITE VISIT' and a '?' button. To the right of the form is a table header with columns: City, Arrive, Depart, Del, Mod.

Scenario 2: First Segment

Second segment

Enter intermediate destination and airport code (El Paso, TX - ELP), and arrival and departure dates. Travel mode is **Contract Flight**.

Cities

Countries

Rail Codes

Comments

Other Expenses

Return to Desktop

Page Help

Use this page to create a Travel Plan. You may create round trip, one way or multiple destination Travel Plans.

Step by step instructions:

1. Verify your originating city and airport, modify as necessary.
2. Enter your departure

Printable Job Aids

Travel Plan

Doc. Number: ZZZZZZZZZZZZZZZZ0000478

City	Arrive	Depart	Del	Mod
BRUNSWICK, GA USA IAD		11/05/2007		MOD

Segment Details

Round Trip

City/State: EL PASO TX

Country Code: USA Airport Code: ELP

Segment Type: Include Meals & Lodging

Travel Mode: Contract Flight

Payment Type: Govt Centrally Billed

Arrive Date: Nov 5 2007

Depart Date: Nov 6 2007

Add

Purpose Of Trip

SITE VISIT

Scenario 2: Second Segment

Third segment

This is the land segment. Enter the final destination (Artesia). The airport code is still ELP. Travel mode is **Rental Car**. Segment type is **Include Meals & Lodging**.

Cities

Countries

Rail Codes

Comments

Days Excluded

Other Expenses

Return to Desktop

Page Help

Use this page to create a Travel Plan. You may create round trip, one way or multiple destination Travel Plans.

Step by step instructions:

1. Verify your originating city and airport, modify as necessary.
2. Enter your departure

Travel Plan

Doc. Number: ZZZZZZZZZZZZZZZZ0000478

City	Arrive	Depart	Del	Mod
BRUNSWICK, GA USA IAD		11/05/2007		MOD
EL PASO, TX USA ELP	11/05/2007	11/08/2007	DEL	MOD

Segment Details

Round Trip

City/State: ARTESIA NM

Country Code: USA Airport Code: ELP

Segment Type: Include Meals & Lodging

Travel Mode: Rental Car

Payment Type: Govt Centrally Billed

Arrive Date: Nov 6 2007

Depart Date: Nov 9 2007

Add

Purpose Of Trip

SITE VISIT

Scenario 2: Third Segment

Fourth and final segment

Enter home city and airport code. Segment type is **Return Home**. Travel Mode is **Contract Flight**.

- Complete Plan
- Cities
- Countries
- Rail Codes
- Comments
- Days Excluded
- Other Expenses
- Reservations
- Return to Desktop

Page Help

Use this page to create a Travel Plan. You may create round trip, one way or multiple destination Travel Plans.

Step by step instructions:

Travel Plan

Doc. Number: ZZZZZZZZZZZZZZZ0000478

City	Arrive	Depart	Del	Mod
BRUNSWICK, GA USA IAD		11/05/2007		MOD
EL PASO, TX USA ELP	11/05/2007	11/06/2007	DEL	MOD
ARTESIA, NM USA ELP	11/06/2007	11/09/2007	DEL	MOD
BRUNSWICK, GA USA BQK	11/09/2007		DEL	

Segment Details

Round Trip

City/State: BRUNSWICK GA

Country Code: USA Airport Code: IAD

Segment Type: Return Home

Travel Mode: Contract Flight

Payment Type: Govt Centrally Billed

Arrive Date: Nov 9 2007

Depart Date: Nov 9 2007

Quick Book

Purpose Of Trip

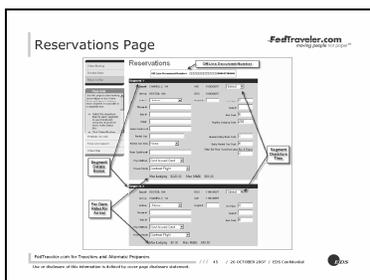
SITE VISIT

Scenario 2: Fourth Segment

Making Reservations

You should be familiar with the relationship between FedTraveler.com and the Online Booking Engine (OBE). You initiate a Travel Plan within FedTraveler.com, but when you actually book travel online, FedTraveler.com communicates the Travel Plan information to the OBE. The OBE then accesses the available global distribution or centralized reservation systems to check inventory, and books your transportation and lodging options. FedTraveler.com uses Amtrak's distribution system for train travel and Sabre as the GDS for other transportation and lodging options.

In order to use the OBE, you must have a valid **User Profile** with all required information including a Government credit card, unless the reservations will be made using a Centrally Billed Account.



Slide 45: Reservations Page

Reservations Page

The **Reservations** page is the starting point for using online booking while creating a Travel Plan. This page displays each segment in your plan as a separate box. Each segment box contains the fields where you enter air, rail, hotel, and rental car arrangements and the cost for each. These can be manually entered after booking travel offline or automatically populated when you use the OBE. When you do book travel offline, use the Offline Document Number that is generated and displayed at the top section of the Reservations page.

To access the **Reservations** page, select the **Reservations** menu option on the **Travel Plan** page.

The Maximum Lodging and Maximum Meals & Incidental Expenses (M&IE) rates for the destination city display at the bottom of each segment box.

Online Booking

Per diem Rates

Return to Plan

Page Help

Use this page to start making reservations in the Online Booking Engine. It displays each segment in your plan in a separate box.

- Select the departure time for each segment in your travel plan using the drop-down menu in the Select box.
- Click Online Booking.

Printable Job Aids

FAQs and Support

Online Help

Reservations

Off Line Document Number ZZZZZZZZZZZZZZZZZZZZ000047900000

Segment 1

Depart	CHANTILLY, VA	IAD	10/30/2007	Select
Arrive	BOSTON, MA	BOS	10/30/2007	
Airline	- None -	Flight #	<input type="text"/>	Air Fare <input type="text" value="0"/>
Ticket #	<input type="text"/>		Seat #	<input type="text"/>
Rail #	<input type="text"/>		Rail Cost	<input type="text" value="0"/>
Hotel	<input type="text"/>		Nightly Lodging Cost	<input type="text" value="220"/>
Hotel Confirm #	<input type="text"/>			
Rental Car	<input type="text"/>		Quoted Daily Roar Cost	<input type="text" value="0"/>
Rental Car Size	None	Daily Rental Car Cost	<input type="text" value="0"/>	
Rcar Confirm #	<input type="text"/>		Total Est Roar Cost (Includes Tax & Fees)	<input type="text" value="0"/>
Pay Method	Govt Issued Card			
Travel Mode	Contract Flight			
Max Lodging		\$220.00	Max M&IE	
			\$64.00	

Segment 2

Depart	BOSTON, MA	BOS	11/01/2007	Select
Arrive	CHANTILLY, VA	IAD	11/01/2007	
Airline	- None -	Flight #	<input type="text"/>	Air Fare <input type="text" value="0"/>
Ticket #	<input type="text"/>		Seat #	<input type="text"/>
Rail #	<input type="text"/>		Rail Cost	<input type="text" value="0"/>
Pay Method	Govt Issued Card			
Travel Mode	Contract Flight			
Max Lodging		\$0.00	Max M&IE	
			\$48.00	

Reservations Page

Actual Necessary and Conference Travel Plans

Actual Necessary

For travel situations where lodging, M&IE, or both are expected to exceed the normal per diem for your destination, choose a segment type of Actual Necessary 150% or Actual Necessary 300% on the **Travel Plan** page, depending on the amount by which expenses will exceed normal per diem amounts.

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Use or disclosure of this information is defined by cover page disclosure statement.



Cities

Countries

Rail Codes

Comments

Days Excluded

Justifications

Other Expenses

Return to Desktop

Page Help

Use this page to create a Travel Plan. You may create round trip, one way or multiple destination Travel Plans.

Step by step instructions:

1. Verify your originating city and airport, modify

Travel Plan

Doc. Number: ZZZZZZZZZZZZZZZZ0000479

Segment Details

Round Trip

City/State: BOSTON MA

Country Code: USA Airport Code: BOS

Segment Type: Actual Necessary 300%

Travel Mode: Contract Flight

Payment Type: Govt Issued Card

Arrive Date: Oct 30 2007

Depart Date: Nov 1 2007

Cancel Modify

City	Arrive	Depart	Del	Mod
CHANTILLY, VA USA IAD		10/30/2007		MOD
BOSTON, MA USA BOS	10/30/2007	11/01/2007		MOD
CHANTILLY, VA USA IAD	11/01/2007		DEL	

! You have an Actual Necessary segment. Select the Reservations menu option to review and adjust your M&IE and Lodging as necessary.

Purpose Of Trip

SITE VISIT ?

Travel Plan: Actual Necessary Segment

When you add an Actual Necessary 150% or 300% segment to your Travel Plan, the following reminder displays below the segment list on the **Travel Plan** page:

“You have an Actual Necessary segment. Select the Reservations menu option to adjust your M&IE and Lodging as necessary.”



Watch Out!

On the **Reservations** page, the **Max Lodging** field will be increased to 150% or 300% of the standard rate for the destination city. The **M&IE** field shows the *standard* M&IE rate for the destination city.

Since both fields can be edited, the Traveler can show realistic projected costs. The **M&IE** field may be increased to the maximum M&IE rate shown below the editable fields. The total of **Max Lodging** plus **M&IE** may not exceed the total maximum per diem shown.

Cities

Countries

Rail Codes

Comments

Days Excluded

Other Expenses

Return to Desktop

Page Help

Use this page to create a Travel Plan. You may create round trip, one way or multiple destination Travel Plans.

Step by step instructions:

1. Verify your originating city and airport, modify as necessary.
2. Enter your departure

Printable Job Aids

Travel Plan

Doc. Number: ZZZZZZZZZZZZZZZ0000479

Segment Details

Round Trip

City/State: BOSTON MA

Country Code: USA Airport Code: BOS

Segment Type: Conference(125% of Lodging)

Travel Mode: Contract Flight

Payment Type: Govt Issued Card

Arrive Date: Oct 30 2007

Depart Date: Nov 1 2007

Cancel Modify

City	Arrive	Depart	Del	Mod
CHANTILLY, VA USA IAD		10/30/2007		MOD
BOSTON, MA USA BOS	10/30/2007	11/01/2007		MOD
CHANTILLY, VA USA IAD	11/01/2007		DEL	

! You have a Conference segment. Select the Reservations menu option to review and adjust Lodging up to 125% as necessary.

Purpose Of Trip

SITE VISIT ?

Travel Plan: Conference Segment

When you add a Conference segment to your Travel Plan, the following reminder displays below the segment list on the **Travel Plan** page:

“You have a Conference segment. Select the Reservations menu option to review and adjust Lodging up to 125%.”



Watch out!

On the **Reservations** page, the maximum lodging rate for the destination city will be increased to 125% of normal. You must edit the amount to show the actual projected lodging costs or the per diem amount for your destination, whichever is higher. The MI&E rate shown will be the normal per diem for your destination and cannot be edited.

Reservations Page: Conference (125% of Lodging)

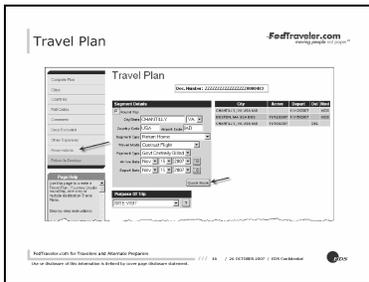
Click the **Per Diem Rates** menu option on the **Reservations** page to check the per diem lodging allowance for your destination.

Choosing Flight Schedule Options

Choosing a flight and an air fare may look confusing at first, because of the sheer number of choices presented to you. But knowing the order in which the options are presented will help you sort through them more efficiently. For Government Travelers, the Online Booking Engine (OBE) used by FedTraveler.com presents schedule and fare options based on GSA Federal Travel Regulation (FTR) guidelines, as defined in the GSA Master Contract.

You will choose your flight schedule departure and return options on the **FlashFacts** Page. To get to the **FlashFacts** page, it is necessary for you to complete the following tasks in FedTraveler.com first:

1. Create a Travel Plan by defining your Travel Segments and choosing a Trip Purpose on the **Travel Plan** page.



Slide 46: Travel Plan

Complete Plan

- Cities
- Countries
- Rail Codes
- Comments
- Days Excluded
- Other Expenses
- Reservations
- Return to Desktop

Travel Plan

Doc. Number: ZZZZZZZZZZZZZZZ0000483

City	Arrive	Depart	Del	Mod
CHANTILLY, VA USA IAD		11/12/2007		MOD
BOSTON, MA USA BOS	11/12/2007	11/15/2007		MOD
CHANTILLY, VA USA IAD	11/15/2007		DEL	

Segment Details

Round Trip

City/State: CHANTILLY VA

Country Code: USA / Airport Code: IAD

Segment Type: Return Home

Travel Mode: Contract Flight

Payment Type: Govt Centrally Billed

Arrive Date: Nov 15 2007

Depart Date: Nov 15 2007

Quick Book

Purpose Of Trip

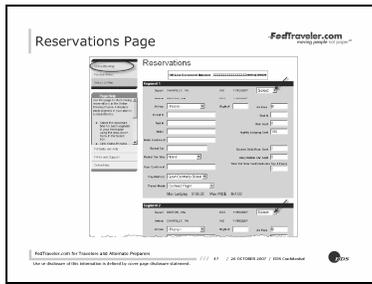
SITE VISIT

Travel Plan

2. Click the **Quick Book** button in Segment Details, or click **Reservations** in the menu options on the left.

*If you click the **Quick Book** button, the departure time for each Segment of your trip will default to 6:00am and the **FlashFacts** page will display, showing available flights for the first leg of your trip.*

3. If you click the **Reservations** menu option, you will need to choose a preferred departure time for each Segment of your trip from the dropdown list at the top of each Segment box on the **Reservations** page.



Slide 47: Reservations Page

Online Booking

Perdiem Rates

Return to Plan

Page Help

Use this page to start making reservations in the Online Booking Engine. It displays each segment in your plan in a separate box.

- Select the departure time for each segment in your travel plan using the drop-down menu in the Select box.
- Click Online Booking.

Printable Job Aids

FAQs and Support

Online Help

Reservations

Off Line Document Number **ZZZZZZZZZZZZZZZZ000048300000**

Segment 1

Depart	CHANTILLY, VA	IAD	11/12/2007	Select
Arrive	BOSTON, MA	BOS	11/12/2007	
Airline	- None -	Flight #	<input type="text"/>	Air Fare <input type="text" value="0"/>
Ticket #	<input type="text"/>			Seat # <input type="text"/>
Rail #	<input type="text"/>			Rail Cost <input type="text" value="0"/>
Hotel	<input type="text"/>			Nightly Lodging Cost <input type="text" value="186"/>
Hotel Confirm #	<input type="text"/>			
Rental Car	<input type="text"/>			Quoted Daily Rear Cost <input type="text" value="0"/>
Rental Car Size	None	<input type="text"/>		Daily Rental Car Cost <input type="text" value="0"/>
Rear Confirm #	<input type="text"/>			Total Est Rear Cost (Includes Tax & Fees) <input type="text" value="0"/>
Pay Method	Govt Centrally Billed			
Travel Mode	Contract Flight			
Max Lodging		\$186.00	Max M&IE	
			\$64.00	

Segment 2

Depart	BOSTON, MA	BOS	11/15/2007	Select
Arrive	CHANTILLY, VA	IAD	11/15/2007	
Airline	- None -	Flight #	<input type="text"/>	Air Fare <input type="text" value="0"/>

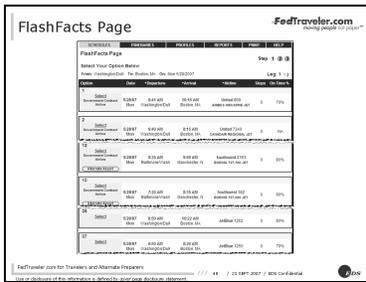
Reservations Page

4. You will then need to click **Online Booking** in the menu options on the left.

*The **FlashFacts** page displays, showing available flights for the first leg of your trip.*

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Slide 48: FlashFacts Page

SCHEDULES	ITINERARIES	PROFILES	REPORTS	PRINT	HELP	
FlashFacts Page						
					Step 1 2 3	
Select Your Option Below						
From: Washington/Dull To: Boston, MA On: Mon 5/28/2007					Leg: 1 1 2	
Option	Date	Departure	Arrival	Airline	Stops	On Time %
1	Select					
Government Contract Airline	5/28/07 Mon	8:41 AM Washington/Dull	10:16 AM Boston, MA	United 860 AIRBUS INDUSTRIE JET	0	70%
2	Select					
Government Contract Airline	5/28/07 Mon	6:40 AM Washington/Dull	8:15 AM Boston, MA	United 7340 CANADAIR REGIONAL JET	0	NA
12	Select					
Government Contract Airline	5/28/07 Mon	8:35 AM Baltimore/Wash	9:50 AM Manchester, N	Southwest 2153 BOEING 737-700 JET	0	80%
Alternate Airport						
13	Select					
Government Contract Airline	5/28/07 Mon	7:20 AM Baltimore/Wash	8:35 AM Manchester, N	Southwest 382 BOEING 737-300 JET	0	90%
Alternate Airport						
36	Select					
	5/28/07 Mon	8:50 AM Washington/Dull	10:22 AM Boston, MA	JetBlue 1252	0	80%
37	Select					
	5/28/07 Mon	6:50 AM Washington/Dull	8:20 AM Boston, MA	JetBlue 1250	0	70%

FlashFacts Page – First Leg

The display of flights on the **FlashFacts** page is arranged in the following order:

1. Government contract airlines for the City Pair you requested.
2. Government contract airlines for alternate airports.
3. All other options close to the departure time you specified.

If no contract exists for the City Pair you requested, alternate airports where a City Pair contract does exist will be displayed first.



Watch Out!

In some cases, the OBE is not displaying Government contract airlines for City Pair contracts that were awarded in FY08. If you encounter this problem, select the flight option and, when prompted, provide a justification indicating that a Government contract carrier was selected. In addition, contact the FedTraveler.com Call Center and provide the representative with the specific City Pair that did not display with the Government contract fare.

Alternate Airports

The display of alternate airport/city options for a specific destination is a GSA Master Contract requirement.

The FedTraveler.com OBE's rule for displaying alternate airports is based on a sixty-mile radius from the specified destination. A mileage calculation is used to determine the alternate airports, and then the GSA City-Pair Program is used to determine the contract carriers within those alternate airports.

An Agency's business policy will determine what alternate airports in an area are reasonable to use based on travel time, costs, and other factors. There is nothing in the Federal Travel Regulation (FTR) that defines alternate airports or their use. A related portion of the FTR discusses the travel route, but does not specifically address alternate airports:

"301-10.7 How should I route my travel? You must travel to your destination by the usually traveled route unless your Agency authorizes or approves a different route as officially necessary."

Scheduling Flights

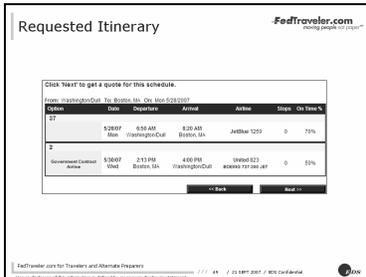
1. On the **FlashFacts** page, click the **Select** link for a flight which fits your schedule for the first air leg of your trip. Choose a Government contract flight if one is available.

*The **FlashFacts** page refreshes, showing the scheduling options for the next air leg of your trip. If your trip is a simple round trip to a single destination, this will be the return leg.*

2. Click the **Select** link for a flight which fits your schedule for the next air leg of your trip. Choose a Government contract flight if one is available.

- If your trip contains more than two legs, continue selecting flights until you have chosen a flight for each leg of your trip.

When you have chosen all your flights, the **FedTraveler.com OBE** displays your requested itinerary.



Slide 49: Requested Itinerary

Click 'Next' to get a quote for this schedule.

From: Washington/Dull To: Boston, MA On: Mon 5/28/2007

Option	Date	Departure	Arrival	Airline	Stops	On Time %
37	5/28/07 Mon	6:50 AM Washington/Dull	8:20 AM Boston, MA	JetBlue 1250	0	70%
2	5/30/07 Wed	2:13 PM Boston, MA	4:00 PM Washington/Dull	United 823 BOEING 737-300 JET	0	50%

Requested Itinerary

- Click the **Next** button to get a fare quote for your requested itinerary, plus a list of additional itinerary and fare options.

The **QuikQuote** page displays.



Slide 50: QuikQuote Page

SCHEDULES	ITINERARIES	PROFILES	REPORTS	PRINT	HELP
QuikQuote					Step 1 2 3
Please select from one of the Options below					Sort Options By: <input type="button" value="Default"/>
Return to Schedules					
From: Washington/Dull To: Boston, MA On: Mon 5/28/2007					
Option 1	Date	Departure	Arrival	Airline	Info
Requested Itinerary	5/28/2007 Mon	6:40 AM Washington/Dull	8:15 AM Boston, MA	United 7340 CANADAIR REGIONAL JET	<input type="button" value="View Seat Maps"/>
	Duration: 3h 20min	5/30/2007 Wed	8:45 PM Boston, MA	10:30 PM Washington/Dull	
Select a 'Fare Option' from the list below					
	Fare Option	Fare Description		Purchase By	Fare
	GSA	Lowest Available Federal Government YCA Contract Fare		5/28/2007	\$240.80
Option 2	Date	Departure	Arrival	Airline	Info
Government Contract Airline	5/28/2007 Mon	8:41 AM Washington/Dull	10:16 AM Boston, MA	United 860 AIRBUS INDUSTRIE JET	<input type="button" value="View Seat Maps"/>
	Duration: 3h 20min	5/30/2007 Wed	8:45 PM Boston, MA	10:30 PM Washington/Dull	
Select a 'Fare Option' from the list below					
	Fare Option	Fare Description		Purchase By	Fare
	Lowest Available	Click this Additional Fare Options link to list additional fares for this itinerary option.		5/23/2007	\$240.80
Option 14	Date	Departure	Arrival	Airline	Info
Government Contract Airline	5/28/2007 Mon	8:35 AM Baltimore/Wash	9:50 AM Manchester, N	Southwest 2153 BOEING 737-700 JET	<input type="button" value="Alternate Airport"/>
	Duration: 2h 40min	5/30/2007 Wed	12:00 PM Manchester, N	1:25 PM Baltimore/Wash	
Select a 'Fare Option' from the list below					
	Fare Option	Fare Description		Purchase By	Fare
	Lowest Available	Click this Additional Fare Options link to list additional fares for this itinerary option.		5/23/2007	\$171.30
Option 15	Date	Departure	Arrival	Airline	Info
Government Contract Airline	5/28/2007 Mon	7:20 AM Baltimore/Wash	8:35 AM Manchester, N	Southwest 382 BOEING 737-300 JET	<input type="button" value="Alternate Airport"/>
	Duration: 2h 40min	5/30/2007 Wed	12:00 PM Manchester, N	1:25 PM Baltimore/Wash	
Select a 'Fare Option' from the list below					
	Fare Option	Fare Description		Purchase By	Fare
	Lowest Available	Click this Additional Fare Options link to list additional fares for this itinerary option.		5/23/2007	\$171.30
Option 28	Date	Departure	Arrival	Airline	Info
Duration: 3h 00min	5/28/2007 Mon	2:50 PM Baltimore/Wash	4:21 PM Boston, MA	Delta 5410 CANADAIR REGIONAL JET Operated By Comair	<input type="button" value="Alternate Airport"/>
	5/30/2007 Wed	12:50 PM Boston, MA	2:19 PM Baltimore/Wash	Delta 5407 CANADAIR REGIONAL JET Operated By Comair	
Select a 'Fare Option' from the list below					
	Fare Option	Fare Description		Purchase By	Fare
	Lowest Available	Click this Additional Fare Options link to list additional fares for this itinerary option.		5/23/2007	\$234.80
Option 29	Date	Departure	Arrival	Airline	Info
Duration: 3h 04min	5/28/2007 Mon	7:00 PM Baltimore/Wash	8:27 PM Boston, MA	Delta 5414 CANADAIR REGIONAL JET Operated By Comair	<input type="button" value="Alternate Airport"/>
	5/30/2007 Wed	8:50 AM Boston, MA	10:27 AM Baltimore/Wash	Delta 5403 CANADAIR REGIONAL JET Operated By Comair	

QuikQuote Page

Fare Options

The display of fare options on the **QuikQuote** page is arranged in the following order:

1. Requested itinerary fares
2. Government Contract Carrier fares for the requested City Pair (preferred routing)
3. Government Contract Carrier fares for Alternate Airports (alternate routings)
4. Other Non-Contract Carrier fares that are comparable to, or lower than, the fare for your requested itinerary

The first time you click the **Lowest Available** link for a fare option, the list of fares for that itinerary option is displayed, and the page automatically scrolls down so you see your chosen option at the top of the page.



Slide 51: Lowest Available - First Click

SCHEDULES	ITINERARIES	PROFILES	REPORTS	PRINT	HELP
QuikQuote Step 1 2 3					
Please select from one of the Options below Sort Options By: Default					
Return to Schedules QuikQuote Options Page					
From: Washington/Dull To: Boston, MA On: Mon 5/28/2007					
Option 1	Date	Departure	Arrival	Airline	Info
Requested Itinerary	5/28/2007	6:40 AM	8:15 AM	United 7340	View Seat Maps
	Mon	Washington/Dull	Boston, MA	CANADAIR REGIONAL JET	
Duration: 3h 22min	5/30/2007	4:44 PM	6:31 PM	United 7212	View Seat Maps
	Wed	Boston, MA	Washington/Dull	CANADAIR REGIONAL JET	
Select a 'Fare Option' from the list below					
Fare Option	Fare Description			Purchase By	Fare
GSA	Lowest Available Federal Government YCA Contract Fare			5/28/2007	\$240.80
Option 2	Date	Departure	Arrival	Airline	Info
Government Contract Airline	5/28/2007	8:41 AM	10:16 AM	United 860	View Seat Maps
	Mon	Washington/Dull	Boston, MA	AIRBUS INDUSTRIE JET	
Duration: 3h 22min	5/30/2007	4:44 PM	6:31 PM	United 7212	View Seat Maps
	Wed	Boston, MA	Washington/Dull	CANADAIR REGIONAL JET	
Click here... Select a 'Fare Option' from the list below					
Fare Option	Fare Description			Purchase By	Fare
Lowest Available	Click this Additional Fare Options link to list additional fares for this itinerary option.			5/25/2007	\$240.80

Lowest Available - First Click

Option 2	Date	Departure	Arrival	Airline	Info
Government Contract Airline	5/28/2007 Mon	8:41 AM Washington/Dull	10:16 AM Boston, MA	United 860 AIRBUS INDUSTRIE JET	View Seat Maps
	Duration: 3h 22min	5/30/2007 Wed	4:44 PM Boston, MA	6:31 PM Washington/Dull	

Select a 'Fare Option' from the list below

Fare Option	Fare Description	Purchase By	Fare
GSA Lowest Available	Federal Government YCA Contract Fare	5/28/2007	\$240.80

Lowest Available – First Click Results

The second time you click the **Lowest Available** link for an itinerary fare option, or when you click any other fare option in the list, the **Reserve Itinerary** page displays, where you will again see details about the fare type you chose.



Slide 52: Lowest Available – Second Click

Option 2	Date	Departure	Arrival	Airline	Info
Government Contract Airline	5/28/2007 Mon	8:41 AM Washington/Dull	10:16 AM Boston, MA	United 860 AIRBUS INDUSTRIE JET	View Seat Maps
	Duration: 3h 22min	5/30/2007 Wed	4:44 PM Boston, MA	6:31 PM Washington/Dull	

Select a 'Fare Option' from the list below

Fare Option	Fare Description	Purchase By	Fare
GSA Lowest Available	Federal Government YCA Contract Fare	5/28/2007	\$240.80

Lowest Available – Second Click

SCHEDULES ITINERARIES PROFILES REPORTS PRINT HELP

Reserve Itinerary Step 1 2 3

Please review the information below
Fares are not guaranteed until purchased. This information was valid 5/24/2007 8:42:30 AM.

Traveler: JONES/DAVID

...to see this.

Fare Option	Fare Description	Purchase By	Fare
Lowest Available	Federal Government YCA Contract Fare	5/28/2007	\$240.80

5/28/2007 Mon From: Washington/Dull To: Boston, MA Airline: United
Departing: 8:41 AM Arriving: 10:16 AM Flight: 860
Flight Time: 1:35 (hh:mm) Equipment: AIRBUS INDUSTRIE JET

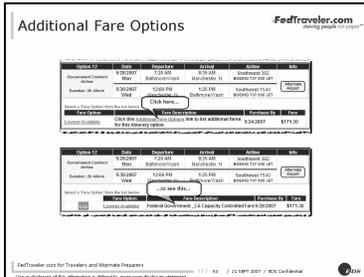
[Reserve a Car](#) in Boston, MA [Reserve a Hotel](#) in Boston, MA

5/30/2007 Wed From: Boston, MA To: Washington/Dull Airline: United
Departing: 4:44 PM Arriving: 6:31 PM Flight: 7212
Flight Time: 1:47 (hh:mm) Equipment: CANADAIR REGIONAL JET

Reserve Itinerary Page

Additional Fare Options

It is possible to explore more fare options directly on the **QuikQuote** page by using the **Additional Fare Options** link provided with each listing. Each time you click an **Additional Fare Options** link, details about available fares are provided for the selected itinerary option, and the page automatically scrolls down so you see your chosen option at the top of the page. You may perform this operation on any number of itinerary options without leaving the **QuikQuote** page.



Slide 53: Additional Fare Options

Option 12	Date	Departure	Arrival	Airline	Info
Government Contract Airline	5/28/2007 Mon	7:20 AM Baltimore/Wash	8:35 AM Manchester, N	Southwest 382 BOEING 737-300 JET	Alternate Airport
	Duration: 2h 40min	5/30/2007 Wed	12:00 PM Manchester, N	1:25 PM Baltimore/Wash	

Select a 'Fare Option' from the list below

Fare Option	Fare Description	Purchase By	Fare
Lowest Available	Click this Additional Fare Options link to list additional fares for this itinerary option.	5/24/2007	\$171.30

Option 12	Date	Departure	Arrival	Airline	Info
Government Contract Airline	5/28/2007 Mon	7:20 AM Baltimore/Wash	8:35 AM Manchester, N	Southwest 382 BOEING 737-300 JET	Alternate Airport
	Duration: 2h 40min	5/30/2007 Wed	12:00 PM Manchester, N	1:25 PM Baltimore/Wash	

Select a 'Fare Option' from the list below

Fare Option	Fare Description	Purchase By	Fare
GSA Lowest Available	Federal Government_CA Capacity Controlled Fare	5/28/2007	\$171.30

Additional Fare Options

Fare Types

There could be two federal government fares in your market: a highly discounted unrestricted fare (YCA), and a capacity controlled fare (_CA) with an even deeper discount. _CA fares have a limited number of seats, but no other restrictions. The availability of _CA fares varies carrier-by-carrier and market-by-market. The differential between YCA and _CA fares varies market-by-market.

Agency business rules require you to choose the lowest available federal government fare. Each Agency will establish which fare type is to be chosen by their travelers. GSA City Pair fares are labeled as such.

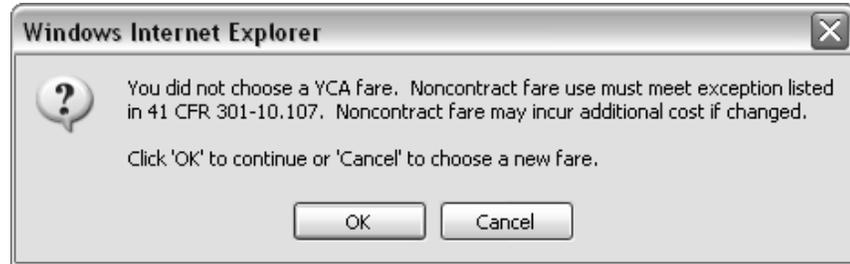
Additional fare descriptions you may see include:

- NON-Contract Matching Fare
- Fully Refundable Fare
- Federal YCA/NON-Contract Matching Fare Combination

If you choose a fare option other than a YCA or _CA fare, you will have to acknowledge a non-contract fare warning:



Slide 54: Non-contract Fare Warning



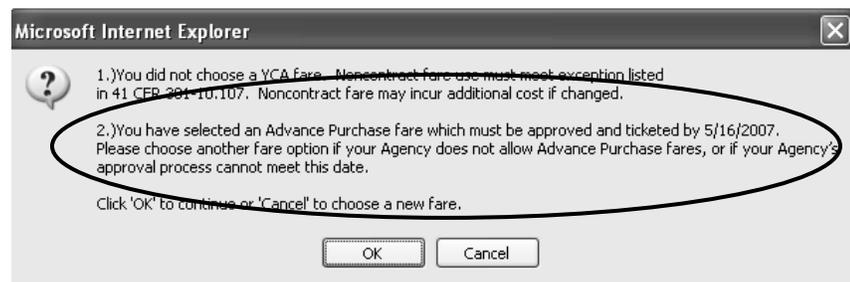
You will also be required to choose a reason for your fare selection from a dropdown list on the **Reservations** page.

If you choose a fare that has an Advance Purchase requirement, you will see a different alert message (see 2 in the box below). In most cases, an Advance Purchase fare needs to be approved and ticketed by the following day. Please note the Purchase By date, shown on the **QuikQuote** page after the fare description, and also in the alert message below.

If your Agency does not allow Advance Purchase fares, or if your Agency's approval process cannot meet the Purchase By date, then click the **Cancel** button and choose another fare option.



Slide 55: Advance Purchase Warning



Exclusive Carriers

Some airlines do not allow tickets for their flights to be sold in combination with those of other carriers. These airlines are referred to as exclusive carriers. Southwest Airlines is an example of an exclusive carrier.

In FedTraveler.com, it is possible to book a Southwest flight on the same trip with other airlines (for example, Delta, American, or United). The Traveler will see a single integrated itinerary at the end of the reservation process.

There is one important difference from a standard itinerary: each of the reserved flights has a unique identifier number. The flights are linked by a virtual record locator (called a SuperPNR) which appears in the **Record Locator** field near the top of each page of the itinerary. For definitions of the terms PNR and SuperPNR, see *Appendix B - Terms and Acronyms* at the end of this guide.

The individual flight identifiers appear on the last page of the itinerary below the sentence, "This itinerary is linked to the following GDS records." When calling the Travel Management Center or the FedTraveler.com Help Desk, the Traveler should give the individual flight identifiers to the agent.

TO: ATTN MATT HUGHES EDS TESTING ACCOUNT 03 14000 THUNDERBOLT PLACE HERNDON VA 20151 Document Number: ZTESTACCT7ZTEST06 DHS0712COSTORG6XX000011900000		Agent : Customer : 9199999945 Record Locator : HBBBKG				
FOR: Hughes, Matt DHS0712COSTORG6XX00001190						
Date	Airline Reference	Flight Number	Departs From	Arrives To	Equipment	Meal
Tue, Feb. 13	Southwest 5TBKPL	2553B	9:25AM Baltimore/Wash	12:20PM San Diego, CA	COACH	
Sat, Feb. 24	Delta PRWEBR	1570K	8:15AM San Diego, CA	3:22PM Atlanta, GA	COACH Brunch	
	DEP-TERMINAL 2	ARR-SOUTH TERMINAL				
	Delta PRWEBR	795A	4:00PM Atlanta, GA	5:46PM Baltimore/Wash	FIRST CLASS	
	DEP-SOUTH TERMINAL					
AIR FARE QUOTED: 835.90 PENALTY % Tkt By: 14DEC *** Fares are Not Guaranteed Until Ticketed. ***						
Itinerary Remarks: U1-ZTESTACCT7ZTEST3..... U68-ZTESTACCT7ZTEST06..... U69-DHS0712COSTORG6XX000011900000 U93-Y HBBBKG						
THIS ITINERARY IS LINKED TO THE FOLLOWING GDS RECORDS						
S-EZAAGA S-GDLTPA						

SuperPNR Record Locator

Linked GDS Record Locators (PNRs)

SuperPNR Itinerary

For a SuperPNR trip, the Traveler will receive separate e-tickets and cancellation notices for each flight.

Making Reservations

When you have made your final choices for flights and fares on the **QuikQuote** page, click the **Lowest Available** link for the flights and fares combinations you wish to reserve.

The **Reserve Itinerary** page displays.



COREY BIRCH
[Return to Segment](#)

SCHEDULES
ITINERARIES
PROFILES
REPORTS
PRINT
HELP

Step **1** 2 3

Reserve Itinerary

Please review the information below

Fares are not guaranteed until purchased. This information was valid 6/5/2007 7:40:07 AM.

Traveler: BIRCH/COREY

Option 1

Fare Option	Fare Description	Purchase By	Fare
Lowest Available	Federal Government YCA Contract Fare	6/25/2007	\$240.80

6/25/2007 Mon	From: Washington/Dull Departing: 8:40 AM Flight Time: 1:28 (hh:mm)	To: Boston, MA Arriving: 10:08 AM Equipment: BOEING 757-200	Airline: United Flight: 860
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[Reserve a Car](#)
in Boston, MA


[Reserve a Hotel](#)
in Boston, MA

6/29/2007 Fri	From: Boston, MA Departing: 4:47 PM Flight Time: 1:45 (hh:mm)	To: Washington/Dull Arriving: 6:32 PM Equipment: CANADAIR REGIONAL JET	Airline: United Flight: 7233
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[Reserve a Car](#)
in Washington/Dull


[Reserve a Hotel](#)
in Washington/Dull

Additional Information:

Reserve Remarks:

(applies only to the reserve option, not purchase)

Seating Options:

Allow QualityAgent to select seats.

Select seats from maps (if available).

Reserve Itinerary Options:

Allow QualityAgent to select seats.

Reserve

Reserve the itinerary, but do not purchase a ticket.

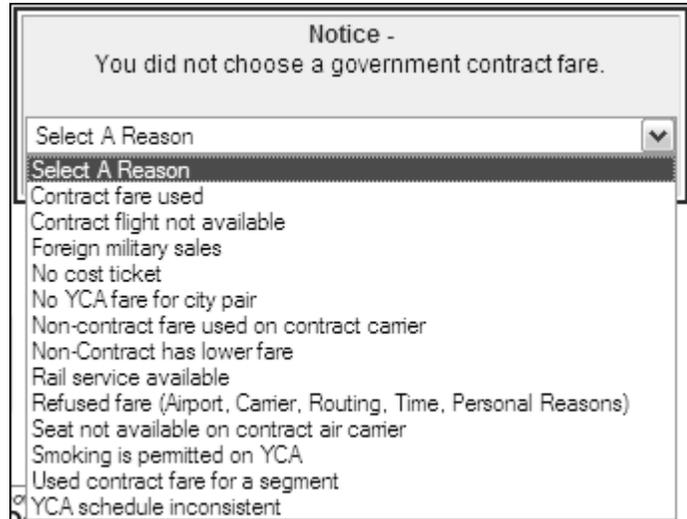
<< Back

Back to QuikQuote

Reserve Itinerary Page

At this page, you have a choice. At any time, you can click the **Reserve** button at the bottom of the page to make reservations for your flights. Or you can make your hotel and rental car reservations first, so your itinerary will be complete.

A **Notice** box displays at the bottom of the **Reserve Itinerary** page if you did not choose a Government contract fare. You must select a reason for choosing a non-contract fare from the dropdown list before you can click the **Reserve** button.



Non-contract Fare Reasons

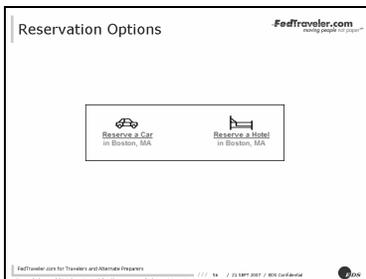
Making Hotel Reservations

To make hotel reservations, do the following:

1. On the **Reserve Itinerary** page, click the **Reserve a Hotel** icon found in the segment where you need accommodations.



The **Reserve a Hotel** page displays.



Slide 56: Reservation Options



Slide 57: Reserve a Hotel Page

SCHEDULES	ITINERARIES	PROFILES	REPORTS	PRINT	HELP
-----------	-------------	----------	---------	-------	------

Reserve a Hotel

Traveler Information
 Traveler Name: BIRCH/COREY

Hotel Information
 Check-In Date: Jun 25 (Mon) | Check-Out Date: Jun 29 (Mon) | Room Type: Best Rate

Search Criteria
 Preferred Hotel Chain: ALL (Advanced Search Options)
 Find hotels within 20 miles of
 Address: Street, *City, **State (2 letter code), Zip, *Country: US
 Airport: Boston, MA

<< Back | Continue

Reserve a Hotel Page

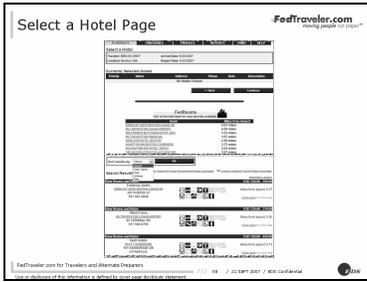
2. Check-in and check-out dates are pre-populated based on your flight information. Review them to ensure accuracy.
3. Choose a specific room type from the **Room Type** dropdown menu, or leave the default choice of **Best Rate**.
4. More than 300 hotels and hotel chains are listed in the **Preferred Hotel Chain** dropdown menu. You may choose a preferred hotel or chain, or leave the default selection of **All**.
5. Click the **Advanced Search Options** link if you want to define specific criteria for your hotel selection.

Preferred Hotel Chain: <input type="text" value="ALL"/> <input type="button" value="v"/>		[Advanced Search Options]
Amenities:		
<input type="checkbox"/> Business Ready	<input type="checkbox"/> Dining	
<input type="checkbox"/> Meeting Facilities	<input type="checkbox"/> Car Rental Counter	
<input type="checkbox"/> Business Center	<input type="checkbox"/> Airport Shuttle	
<input type="checkbox"/> Fitness Center	<input type="checkbox"/> Wheel Chair	
<input type="checkbox"/> Golf	<input type="checkbox"/> Recreation	
<input type="checkbox"/> Tennis	<input type="checkbox"/> Pets	
<input type="checkbox"/> Conventions	<input type="checkbox"/> Game Facilities	
<input type="checkbox"/> Pool	<input type="checkbox"/> Kids Facilities	
<input type="checkbox"/> Fire Safe		
<small>Put a check in the boxes for amenities that you would like.</small>		
Types of Hotels:		
<input type="checkbox"/> Luxury	<input type="checkbox"/> Castle	
<input type="checkbox"/> First Class	<input type="checkbox"/> Farm	
<input type="checkbox"/> Economy	<input type="checkbox"/> Apartments	
<input type="checkbox"/> Motel	<input type="checkbox"/> Suites	
<input type="checkbox"/> Resort	<input type="checkbox"/> Extended Stay	
<input type="checkbox"/> Bed and Breakfast	<input type="checkbox"/> Moderate	
<small>Put a check in the boxes for hotel types that you would like.</small>		

Reserve a Hotel: Advanced Search Options

- If you wish to center your hotel search on a specific location, you may enter an address in the **Search Criteria** box. You may also limit the radius of the search by changing the mileage. The default is to find all hotels within 20 miles of the airport.
- Click the **Continue** button.

*The OBE searches for available hotels. The **Select a Hotel** page displays the search results with any available FedRooms options listed first.*



Slide 58: Select a Hotel Page

SCHEDULES ITINERARIES PROFILES REPORTS PRINT HELP

Select a Hotel

Traveler: BIRCH/COREY Arrival Date: 6/20/2007
Location: Boston, MA Depart Date: 6/22/2007

Currently Selected Hotels

Priority	Name	Address	Phone	Rate	Description
No Hotels Chosen					

FedRooms 
 Click on the hotel name for room and rate availability

Hotel	Miles from Airport
EMBASSY SUITE BOSTON LOGAN AR	0.07 miles
HILTON BOSTON LOGAN AIRPORT	0.50 miles
MILLENNIUM BOSTONIAN HOTEL BOS	1.52 miles
HILTON BOSTON FINANCIAL	1.57 miles
RADISSON HOTEL BOSTON	2.50 miles
HAMPTON INN BOSTON CAMBRIDGE	2.75 miles
HOLIDAY INN EXP HOTEL SUITES	2.92 miles
THE WESTIN COPLEY PLACE BOSTON	3.07 miles

Sort results by:

Search Results: [Amenities Legend](#)

[View Rooms and Rates](#) **USD 359.00 - 399.00**

Embassy Suites
[EMBASSY SUITE BOSTON LOGAN AR](#)
207 PORTER ST
617 567-5000

 Miles from airport: 0.07
[\(Click here\) to view map](#)

[View Rooms and Rates](#) **USD 339.00 - 379.00**

Hilton/Conra
[HILTON BOSTON LOGAN AIRPORT](#)
85 TERMINAL RD
617 568-6700

 Miles from airport: 0.50
[\(Click here\) to view map](#)

[View Rooms and Rates](#) **USD 159.00 - 459.00**

Hyatt Hotels
[HYATT HARBORSIDE](#)
101 HARBORSIDE DR
6175681234

 Miles from airport: 0.74
[\(Click here\) to view map](#)

Select a Hotel Page

The **Select a Hotel** page is divided into two parts. The upper portion of the page contains a simple list of FedRooms properties sorted by the search criteria you identified on the previous page. The lower portion gives more detailed information about each FedRooms property plus other properties, including the street address and phone number. The icons to the right of the hotel name and address identify amenities available. Mouse over the icons for more information, or click an icon for a list of amenities.

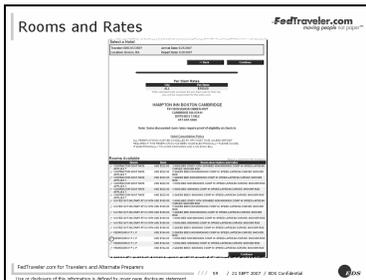


Hint

The Lodging per diem allowance for your destination city is shown above the hotel list to guide you in selecting a reimbursable room rate.

8. To view rooms and rates, click the name of the hotel.

Available rooms in the selected hotel display.



Slide 59: Rooms and Rates

Select a Hotel

Traveler: BIRCH/COREY Arrival Date: 6/25/2007
Location: Boston, MA Depart Date: 6/29/2007

Per Diem Rates

City	Per Diem
ALL	\$168.00

If the selected hotel exceeds the per diem rate for that city, you will be responsible for the extra cost.

HAMPTON INN BOSTON CAMBRIDGE
191 MONSIGNOR OBRIEN HWY
CAMBRIDGE MA 02141
DWTN BOS 1 MILE
617-661-5600

Note: Some discounted room rates require proof of eligibility at check in.

Hotel Cancellation Policy
ALL RESERVATIONS MUST BE CANCELLED BY 6PM HOST TIME UNLESS DEPOSIT REQUIRED IF THIS RESERVATION HAS BEEN MADE ELECTRONICALLY PLEASE CANCEL IT ELECTRONICALLY TO AVOID CONFUSION AND A NO SHOW BILL

Rooms Available Select a room from the list below

Room	Rate	Room description and rules
<input type="radio"/> CONTRACTOR GOVT RATE	USD \$222.00	1 KING BED STUDY WITH SOFABED NONSMOKING COMP HI SPEED-LAPDESK-CURVED SHOWER ROD
<input type="radio"/> CONTRACTOR GOVT RATE	USD \$222.00	2 QUEEN BEDS NONSMOKING COMP HI SPEED-LAPDESK-CURVED SHOWER ROD
<input type="radio"/> CONTRACTOR GOVT RATE	USD \$222.00	1 QUEEN BED NONSMOKING COMP HI SPEED-LAPDESK-CURVED SHOWER ROD
<input type="radio"/> CONTRACTOR GOVT RATE	USD \$222.00	1 KING BED NONSMOKING COMP HI SPEED-LAPDESK-CURVED SHOWER ROD
<input type="radio"/> CONTRACTOR GOVT RATE	USD \$222.00	1 KING BED SMOKING COMP HI SPEED-LAPDESK-CURVED SHOWER ROD
<input type="radio"/> CONTRACTOR GOVT RATE	USD \$222.00	2 QUEEN BEDS SMOKING COMP HI SPEED-LAPDESK-CURVED SHOWER ROD
<input type="radio"/> US FED GVT MILITARY RT IS WITH	USD \$165.00	1 KING BED STUDY WITH SOFABED NONSMOKING COMP HI SPEED-LAPDESK-CURVED SHOWER ROD
<input type="radio"/> US FED GVT MILITARY RT IS WITH	USD \$165.00	2 QUEEN BEDS NONSMOKING COMP HI SPEED-LAPDESK-CURVED SHOWER ROD
<input type="radio"/> US FED GVT MILITARY RT IS WITH	USD \$165.00	1 QUEEN BED NONSMOKING COMP HI SPEED-LAPDESK-CURVED SHOWER ROD
<input type="radio"/> US FED GVT MILITARY RT IS WITH	USD \$165.00	1 KING BED NONSMOKING COMP HI SPEED-LAPDESK-CURVED SHOWER ROD
<input type="radio"/> US FED GVT MILITARY RT IS WITH	USD \$165.00	1 KING BED SMOKING COMP HI SPEED-LAPDESK-CURVED SHOWER ROD
<input type="radio"/> US FED GVT MILITARY RT IS WITH	USD \$165.00	2 QUEEN BEDS SMOKING COMP HI SPEED-LAPDESK-CURVED SHOWER ROD
<input type="radio"/> FEDROOMS F P L P	USD \$164.00	2 QUEEN BEDS NONSMOKING COMP HI SPEED-LAPDESK-CURVED SHOWER ROD
<input checked="" type="radio"/> FEDROOMS F P L P	USD \$164.00	1 KING BED NONSMOKING COMP HI SPEED-LAPDESK-CURVED SHOWER ROD
<input type="radio"/> FEDROOMS F P L P	USD \$164.00	1 KING BED SMOKING COMP HI SPEED-LAPDESK-CURVED SHOWER ROD
<input type="radio"/> FEDROOMS F P L P	USD \$164.00	2 QUEEN BEDS SMOKING COMP HI SPEED-LAPDESK-CURVED SHOWER ROD

Rooms and Rates



- Select an available room type by clicking the radio button next to the room description.

Key Point

If you select something other than a FedRooms property, you will be required to provide justification.

- Click the **Continue** button.

Your selected hotel with complete information is added to the **Currently Selected Hotels** list. You may want to select an additional hotel as a backup in case your first choice is not available. You can choose up to three hotels.



Slide 60: Hotel List – Three Hotels Selected

Select a Hotel

Traveler: BIRCH/COREY Arrival Date: 6/25/2007
 Location: Boston, MA Depart Date: 6/29/2007

Currently Selected Hotels

Priority	Name	Address	Phone	Rate	Description
<input type="radio"/> 1	HOLIDAY INN EXP HOTEL SUITES	250 MONSIGNOR OBRIEN HWY CAMBRIDGE MA 02141	617-577-7600	\$149.00	STANDARD ROOM STANDARD ROOM BASED ON ROOM TYPE AVAILABILITY INCLUDES FREE WIRELESS INTERNET ACCESS WET BAR REFRIGERATOR 1 KING BED
<input type="radio"/> 2	HAMPTON INN BOSTON CAMBRIDGE	191 MONSIGNOR OBRIEN HWY CAMBRIDGE MA 02141	617-661-5600	\$164.00	NONSMOKING COMP HI SPEED-LAPDESK- CURVED SHOWER ROD
<input type="radio"/> 3	DOUBLETREE HOTEL BOSTON DOWNTON	821 WASHINGTON ST BOSTON MA 02111	617 956-7900	\$165.00	1 KING BED-SMOKING HI SPEED INTERNET ACCESS 9.95/DAY

Per Diem Rates

City	Per Diem
ALL	\$168.00

If the selected hotel exceeds the per diem rate for that city, you will be responsible for the extra cost.

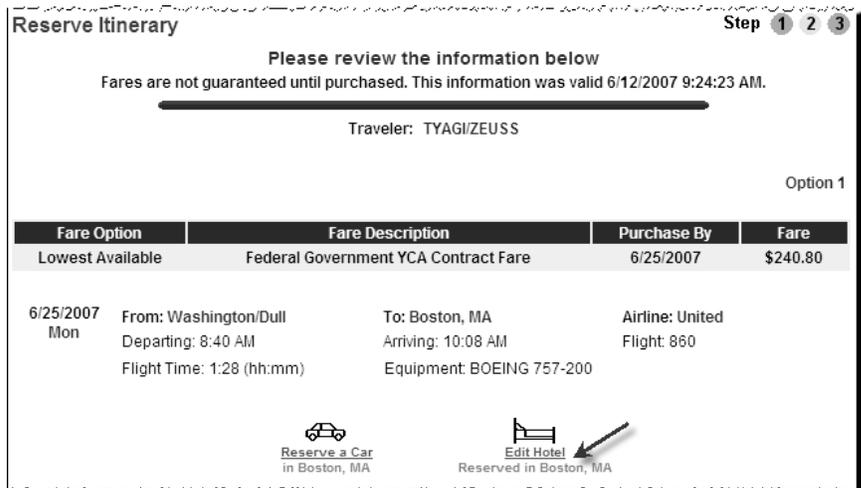
Hotel List – Three Hotels Selected

11. With multiple hotels listed, you can indicate your first, second, and third preferences by using the **Change Priority** buttons. Click the radio button next to the hotel's name, and then click the **Move Up** or **Move Down** button.
12. Click the **Continue** button.

*The **Reserve Itinerary** page displays with your hotel reservation shown in the segment for your destination city. Details of your reservation will be shown later on your completed itinerary.*



Slide 61: Reserve Itinerary – Hotel



Reserve Itinerary – Hotel

Repeat steps 1 through 12 if you need to reserve a hotel for another segment in your itinerary.

Making Car Reservations

To make car rental reservations, do the following:

1. On the **Reserve Itinerary** page, click the **Reserve a Car** icon found in the segment where you need to rent a vehicle.

*The **Reserve a Car** page displays.*

SCHEDULES	ITINERARIES	PROFILES	REPORTS	PRINT	HELP
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Reserve a Car

Traveler Information

Traveler: BIRCH/COREY	Arrival Date: 6/25/2007
Location: Boston, MA	Depart Date: 6/29/2007

Car Information

Pick Up Date Jun 25 <small>Mon</small>	Time 10 AM	Drop Off Date Jun 29 <small>Mon</small>	Time 4 PM
<input checked="" type="radio"/> Pick Up City <small>(Search)</small> (Required) Boston, MA <small>(city name or airport code)</small>		<input type="radio"/> Drop Off City <small>(Search)</small> (Optional)	<small>(city name or airport code)</small>
<input type="radio"/> Pick Up Address (Optional)	Street: <input type="text"/> *City: <input type="text"/> **State: <input type="text"/> (2 letter code) Zip: <input type="text"/> *Country: US <small>[country search]</small>	<input type="radio"/> Drop Off Address (Optional)	Street: <input type="text"/> *City: <input type="text"/> **State: <input type="text"/> (2 letter code) Zip: <input type="text"/> *Country: US <small>[country search]</small>

* Required Fields ** Required in the US

Reserve a Car Page

- The **Pick Up Date**, **Drop Off Date** and **Time** fields are pre-populated using information from your selected flights. Verify the information and make changes if necessary. If you wish to pick up or drop off your car at a location other than the airport, you may enter the address on this page.



Watch Out!

If your Travel Plan only has a single segment with a Travel Mode of Rental Car, the OBE attempts to reserve a rental car at the destination rather than the departure city. Select the departure city manually as indicated in the following screen shot.

FedTraveler.com HAILEY AGUIRRE
 moving people not papersm Return to Segment

SCHEDULES ITINERARIES PROFILES REPORTS HELP

Reserve a Car

Traveler Information

Traveler: AGUIRRE/HAILEY Arrival Date: 8/15/2006
 Location: Roanoke, VA Depart Date: 8/21/2006

Car Information

Pick Up Date: Aug 15 Mon 11:11 AM Time: 8 AM
 Drop Off Date: Aug 21 Mon 11:11 AM Time: 8 AM

Pick Up City (Search): Roanoke, VA (Required) (city name or airport code)
 Drop Off City (Search): (Optional) (city name or airport code)

Rental Car - Select Departure City

3. Click the **Continue** button.

The OBE searches for availability. The **Select a Car** page displays the search results by company, with the Government contract options listed first. If your trip is longer than a month, monthly rates will display if available.

Select a Car - Companies FedTraveler.com

Select a Car

Traveler: BIRCH/COREY Arrival Date: 6/25/2007
 Location: Boston, MA Depart Date: 6/29/2007

Car Company	Price Range	Location
** NATIONAL	\$32.00+	In Airport
** THRIFTY	\$124.00+	In Airport
** AVIS	\$108.00+	In Airport
** BUDGET	\$108.00+	In Airport
** ENTERPRISE	\$105.00+	---
** HERTZ	\$191.00+	In Airport
** DOLLAR	\$27.00+	In Airport
** ALAMO	\$24.00+	In Airport

Back

Slide 62: Select a Car - Companies

Select a Car

Traveler: BIRCH/COREY Arrival Date: 6/25/2007
 Location: Boston, MA Depart Date: 6/29/2007

Prices shown are an approximation.
 Select a car company from the list below to view a list of available cars and prices.

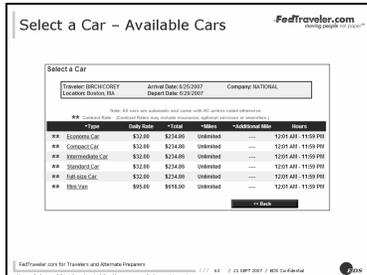
** Government Rate(SDDC) * Traveler Preferred >> Carlson Wagonlit Travel Rates Available

Car Company	Price Range	Location
** NATIONAL	\$32.00+	In Airport
** THRIFTY	\$124.00+	In Airport
** AVIS	\$108.00+	In Airport
** BUDGET	\$108.00+	In Airport
** ENTERPRISE	\$105.00+	---
** HERTZ	\$191.00+	In Airport
** DOLLAR	\$27.00+	In Airport
** ALAMO	\$24.00+	In Airport

<< Back

Select a Car - Companies

4. Click the name of the rental car company of your choice.
The list of the company's available cars displays.



Slide 63: Select a Car – Available Cars

Select a Car

Traveler: BIRCH/COREY Arrival Date: 6/25/2007 Company: NATIONAL
Location: Boston, MA Depart Date: 6/29/2007

Note: All cars are automatic and come with AC unless noted otherwise.
** Contract Rate (Contract Rates may include insurance, optional services or amenities.)

Type	Daily Rate	Total	Miles	Additional Mile	Hours
** Economy Car	\$32.00	\$234.86	Unlimited	----	12:01 AM - 11:59 PM
** Compact Car	\$32.00	\$234.86	Unlimited	----	12:01 AM - 11:59 PM
** Intermediate Car	\$32.00	\$234.86	Unlimited	----	12:01 AM - 11:59 PM
** Standard Car	\$32.00	\$234.86	Unlimited	----	12:01 AM - 11:59 PM
** Full-size Car	\$32.00	\$234.86	Unlimited	----	12:01 AM - 11:59 PM
** Mini Van	\$95.00	\$618.90	Unlimited	----	12:01 AM - 11:59 PM

<< Back

Select a Car – Available Cars

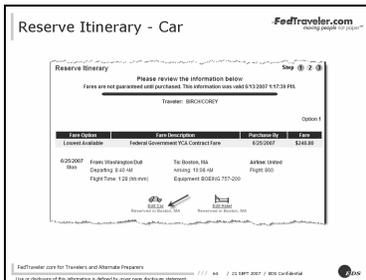
5. To select the car size of your choice, click the car type.

*Your car reservation displays on the **Reserve Itinerary** page in the segment for your destination city. Reservation details are shown later on your completed itinerary.*



Watch Out!

Your Agency may only allow you to select certain types of cars, and may require a justification for a car rental on your Travel Plan.



Slide 64: Reserve Itinerary - Car

Reserve Itinerary Step 1 2 3

Please review the information below
 Fares are not guaranteed until purchased. This information was valid 6/7/2007 9:42:29 AM.

Traveler: BIRCH/COREY

Option 1

Fare Option	Fare Description	Purchase By	Fare
Lowest Available	Federal Government YCA Contract Fare	6/25/2007	\$240.80

6/25/2007 Mon
 From: Washington/Dull To: Boston, MA
 Departing: 8:40 AM Arriving: 10:08 AM
 Flight Time: 1:28 (hh:mm) Equipment: BOEING 757-200
 Airline: United
 Flight: 860

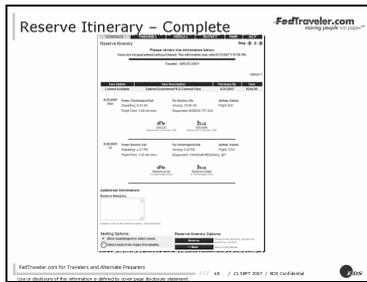
 [Edit Car](#)  [Edit Hotel](#)
 Reserved in Boston, MA Reserved in Boston, MA

Reserve Itinerary - Car

Repeat steps 1 through 5 if you need to reserve a car for another segment in your Travel Plan.

Completing Your Itinerary

When you are finished with all air, hotel and car choices, the **Reserve Itinerary** page displays your complete selections.



Slide 65: Reserve Itinerary – Complete

Reserve Itinerary Step 1 2 3

Please review the information below
Fares are not guaranteed until purchased. This information was valid 6/13/2007 1:17:39 PM.

Traveler: BIRCH/COREY

Option 1

Fare Option	Fare Description	Purchase By	Fare
Lowest Available	Federal Government YCA Contract Fare	6/25/2007	\$240.80

6/25/2007 Mon	From: Washington/Dull Departing: 8:40 AM Flight Time: 1:28 (hh:mm)	To: Boston, MA Arriving: 10:08 AM Equipment: BOEING 757-200	Airline: United Flight: 860
------------------	--	---	--------------------------------

[Edit Car](#) [Edit Hotel](#)
Reserved in Boston, MA Reserved in Boston, MA

6/29/2007 Fri	From: Boston, MA Departing: 4:47 PM Flight Time: 1:45 (hh:mm)	To: Washington/Dull Arriving: 6:32 PM Equipment: CANADAIR REGIONAL JET	Airline: United Flight: 7233
------------------	---	--	---------------------------------

[Reserve a Car](#) [Reserve a Hotel](#)
in Washington/Dull in Washington/Dull

Additional Information:

Reserve Remarks:

(applies only to the reserve option, not purchase)

Seating Options: **Reserve Itinerary Options:**

Allow QualityAgent to select seats. **Reserve** Reserve the itinerary, but do not purchase a ticket.
 Select seats from maps (if available). **<< Back** Back to QuikQuote

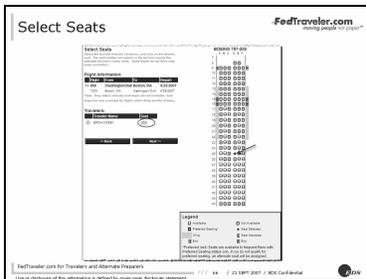
Reserve Itinerary – Complete

Watch Out!

Currently, the OBE is failing to display all segments of the trip when a connecting flight is sold out. Carefully review your itinerary prior to clicking the **Reserve** button.

If you receive an incomplete Itinerary as a result of a flight being sold out, you will need to click the **Back** button to return to QuikQuote and select a flight with a different connection.

1. Scroll down to the bottom of the **Reserve Itinerary** page where you can enter remarks and decide on an airline seating option, if available.
2. Review your itinerary for accuracy. Click the **Back** button if you need to modify the itinerary before you proceed with booking. Click the **Reserve** button to book your flights and to make your hotel and rental car reservations.
3. If you select the radio button labeled **Select seats from maps** (if available) before clicking the **Reserve** button, you will see a seat map for your outbound flight if one is available.



Slide 66: Select Seats

Select Seats

Select the traveler from the list below, and click on the desired seat. The seat number will appear in the text box next to the selected traveler's name. (Note - Some flights do not have seat maps available.)

Flight Information:

Flight	From	To	Depart
>> 860	Washington/Dull	Boston, MA	6/25/2007
7233	Boston, MA	Washington/Dull	6/29/2007

*Note - Gray letters indicate seat maps are not available. Seat maps are only available for flights within three months of today.

Travelers:

Traveler Name	Seat
<input checked="" type="radio"/> BIRCH/COREY	25D

BOEING 757-200

	A	B	C	D	E	F
7						
8						
9	X	X	X	X	X	X
10	X	X	X	X	X	X
11	X	X	X	X	X	X
12	X	X	X	X	X	X
13	X	X	X	X	X	X
14	X	X	X	X	X	X
15	X	X	X	X	X	X
16	X	X	X	X	X	X
17	X	X	X	X	X	X
18	X	X	X	X	X	X
19	X	X	X	X	X	X
20	X	X	X	X	X	X
21	X	X	X	X	X	X
22	X	X	X	X	X	X
23	X	X	X	X	X	X
24	X	X	X	X	X	X
25	X	X	X	X	X	X
26	X	X	X	X	X	X
27	X	X	X	X	X	X
28	X	X	X	X	X	X
29	X	X	X	X	X	X
30	X	X	X	X	X	X
31	X	X	X	X	X	X
32	X	X	X	X	X	X
33	X	X	X	X	X	X
34	X	X	X	X	X	X

Legend

<input type="checkbox"/> Available	<input checked="" type="checkbox"/> Not Available
<input checked="" type="checkbox"/> Preferred Seating*	<input checked="" type="checkbox"/> Seat Selected
<input type="checkbox"/> Wing	<input checked="" type="checkbox"/> Seat Associate
<input checked="" type="checkbox"/> Exit	<input checked="" type="checkbox"/> Exit

*Preferred (red) Seats are available to frequent fliers with Preferred Seating status only. If you do not qualify for preferred seating, an alternate seat will be assigned.

Select Seats

4. Click the icon for an available seat. The icon turns into a star, and the seat number is entered automatically in the **Seat** box.
5. Click the **Next** button, and select your seat on the seat map which displays for your return flight.
6. Click the **Continue** button to make your flight reservations and see a complete itinerary for your trip.
7. When the **Itinerary** page displays, note any ticketing time limit. Print your itinerary if you wish. A copy will also be e-mailed to you.

Watch Out!

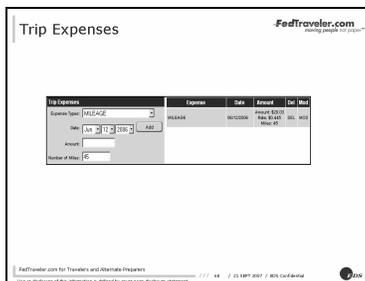
Periodically, the Online Booking Engine (OBE) does not display the hotel address and phone number on the itinerary.

When you finish with the **Itinerary** page, click the **Return to Segment** button at the top of the page. Now that you've made your reservations, you need to complete and submit your Travel Plan.

Entering Supplemental Information

Supplemental information may include:

- Miscellaneous expenses (such as hotel taxes, taxi, gratuities, and parking)
- Personal day you may need to take during official travel
- Comments and justification text for specific elements in your plan that need explanation or clarification



Slide 68: Trip Expenses

Entering Other Expenses

Use this procedure to enter estimates for other expenses:

1. On the **Travel Plan** page, select the **Other Expenses** menu option.

*The **Other Expenses** page displays.*

2. In the **Trip Expenses** box, select an expense item from the dropdown list.
3. Select a date associated with the expense from the dropdown lists.
4. In the **Amount** field, enter the estimated amount of the expense.
5. Click the **Add** button.

*The expense item is added to the table on the right side of the page. If you need to make any corrections, click the **MOD** link next to the expense. You can also click the **DEL** link to remove the expense altogether.*



Hint

If you select Mileage, a **Number of Miles** field displays in the **Trip Expenses** box. Use this to enter the miles you wish to claim. When you click the **Add** button, the reimbursement amount is automatically calculated and displays with the calculation rate in the table on the right side.

Trip Expenses		Expense	Date	Amount	Del	Mod
Expense Types:	MILEAGE	MILEAGE	06/12/2006	Amount: \$20.03 Rate: \$0.445 Miles: 45	DEL	MOD
Date:	Jun 12 2006					
Amount:						
Number of Miles:	45					

Each Agency's business rules determine whether the **Amount** field is visible or not.

- Repeat steps 2 through 5 to add more expense items.
- When finished, select the **Return to Plan** menu option.

Entering Excluded Days

When you need to take a personal day while traveling on business, you must identify that day so that it is excluded from the per diem and lodging calculations.

To enter excluded days, do the following:

- On the **Travel Plan** page, select the **Days Excluded** menu option.
*The **Exclude Days** page displays.*
- Select the **check box** next to the date you want to exclude.
- Select the **Return to Plan** menu option.



Watch Out!

If the only Segment Type being used for a Travel Plan is **No Per Diem**, you will see an HTTP 500 Error when any of the links on the **Travel Plan** page are selected.

Follow these steps to work around this error:

1. For each **No Per Diem** segment in the Travel Plan:
 - a. Click the **MOD** link next to the segment listing on the right side of the Travel Plan page.
 - b. Change the Segment Type to **Actual Necessary 150%**.
 - c. Click the **Modify** button in the lower-right of the Segment Details box.
2. Select the **Reservations** link in the left menu.
3. On the **Reservations** page, enter 0 (zero) in the **Nightly Lodging Cost, Lodging, and M&IE** fields.
4. Complete the Travel Plan using normal procedures.

Entering Justifications

Some items on your Travel Plan may not conform to your Agency's rules and policies or may not comply with the Federal Travel Regulation. In such cases, you must enter a justification for each item.

Some Agencies set limits on certain Other Expenses. If you exceed that limit, you will have to enter a justification for the expense.

To enter justifications, do the following:

1. On the **Travel Plan** page, select the **Justifications** menu option.

*The **Justification** page displays, listing each of the items that you need to justify. If there is no required justification, this page will not display.*

If you forget to enter Justifications, FedTraveler.com will require you to do so when you click the **Complete Plan** menu option.

2. Type your justification in the text box next to each item.

Once you open the **Justification** page, you cannot exit without entering all required justifications.

3. When finished, select the **Return to Plan** menu option.

Entering Comments

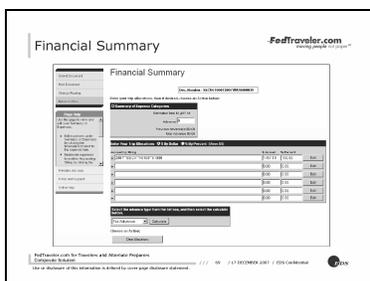
You can provide additional information regarding your trip by entering comments in your Travel Plan that you may want your Approver(s) to know. When you amend a Travel Document, entering comments becomes mandatory. See the section on *Amending Travel Plans* in this Lesson.

To enter comments, do the following:

1. On the **Travel Plan** page, select the **Comments** menu option.
*The **Comments** page displays.*
2. Type your comments in the text box.
3. When finished, select the **Return to Plan** menu option.
4. Click the **Complete Plan** menu option to complete your Travel Plan.

Completing Your Travel Plan

Once you have entered your travel segments, booked your travel, and identified other expenses as needed, you are ready to complete your Travel Plan. On the **Travel Plan** page, select the **Complete Plan** menu option to access the **Financial Summary** page of your Travel Plan.



Slide 69: Financial Summary page

Financial Summary Page

The **Financial Summary** page is the last page in your Travel Plan. It is the last step in the Travel Plan creation process. This page displays the summary of travel costs related to the travel options you have defined and selected thus far. At this stage you can better allocate your planned travel expenses using the various Accounting Strings that your Agency has set up. You can also request a cash advance to cover expenses that will not be charged to your Government credit card. FedTraveler.com calculates the amount based on your total projected travel expenses. Clicking the binoculars icon next to any item in the Summary of Expense Categories section will open a new page with details for that item.

Submit Document

Hold Document

Change Routing

Return to Plan

Page Help

Use this page to view and edit your Summary of Expenses.

- Edit expenses under Summary of Expenses by clicking the binocular icon next to the expense item.
- Reallocate expenses to another Accounting String by clicking the

Printable Job Aids

FAQs and Support

Online Help

Financial Summary

Doc. Number: SECUG1000T2007UUU0000039

Enter your trip allocations, then if desired, choose an Action below:

Summary of Expense Categories

Estimated Total \$1,457.19

Advance

Previous Advance(s) \$0.00

Total Advance \$0.00

Enter Your Trip Allocations \$ By Dollar % By Percent (View All)

Accounting String	\$ Amount	% Percent	
2007**SEC**X0100**61000	1,457.19	100.00	Edit
+	0.00	0.00	Edit
+	0.00	0.00	Edit
+	0.00	0.00	Edit
+	0.00	0.00	Edit
+	0.00	0.00	Edit

Select the advance type from the list box, and then select the calculate button.

No Advance

Choose an Action:

Financial Summary Page

The following table lists the basic menu options located on the **Financial Summary** page:

Menu Options	Use this menu option to...
Return to Plan	Return to the Travel Plan page.
Submit Document	Submit your Travel Plan to your Approval Chain and return to the My Travel Desktop page where your Travel Plan is shown with a status of Under Review.
Hold Document	Put your Travel Plan on hold when you do not have all the necessary information to submit the document.
Change Routing	Select an Approval Chain other than your default.

Slide 70: Financial Summary Menu

Menu Options	Use this menu option to...
Return to Plan	Return to the Travel Plan page.
Submit Document	Submit your Travel Plan to your Approval Chain and return to the My Travel Desktop page where your Travel Plan is shown with a status of Under Review.
Hold Document	Put your Travel Plan on hold when you do not have all the necessary information to submit the document.
Change Routing	Select an Approval Chain other than your default.

Reallocating Travel Expenses

In creating a Travel Plan, you need to accurately identify the funding source(s) for each trip, as well as better define the specific type of each expense item for accounting purposes.

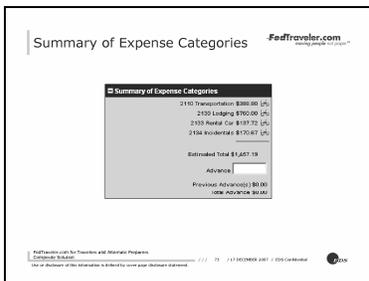
Each Traveler is set up with a default Accounting String, which displays on the first row of the **Enter Your Trip Allocations** table. Depending on trip circumstances, you may need to change

your default Accounting String. If travel is being funded through your default Accounting String, you may still need to reallocate some expenses among other Accounting Strings that your Agency has set up.

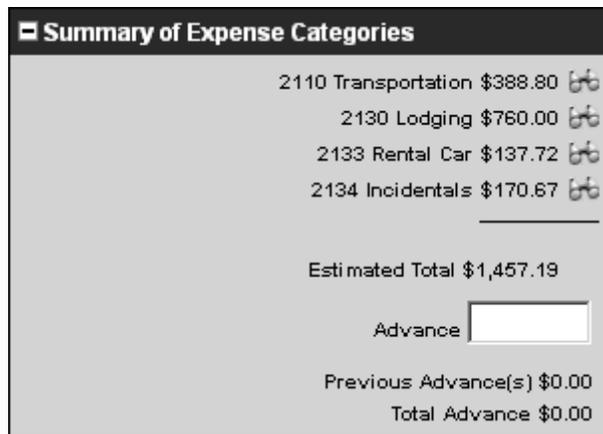


Hint

To view the Expense Category details, click the **plus sign** next to **Summary of Expense Categories**. Click the **minus sign** to hide the details. Click the **binoculars** icon to display the individual Expense Category details.



Slide 71: Summary of Expense Categories

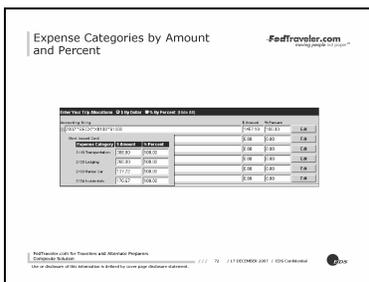


Summary of Expense Categories

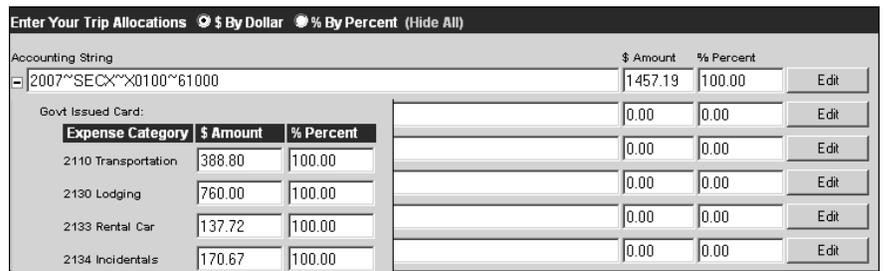


Hint

In the **Enter Your Trip Allocations** section, you can view the Expense Category breakdown by Amount and Percent by clicking the **plus sign** next to the Accounting String. Click the **minus sign** to hide the breakdown.



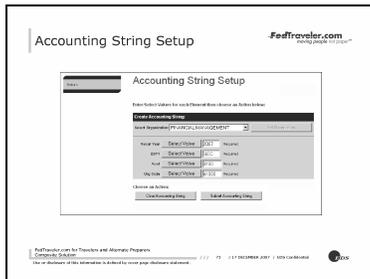
Slide 72: Expense Categories by Amount and Percent



Expense Categories by Amount and Percent

5. If necessary, you can modify or add an Accounting String.
 - a. To modify an Accounting String, click the **Edit** button next to the **Accounting String** field you wish to modify and then click the **Modify** button.
 - b. To add an Accounting String, click the **Edit** button next to a blank Accounting String field and then click the **Add** button.

The **Accounting String Setup** page displays.



Slide 73: Accounting String Setup

Return

Accounting String Setup

Enter/Select Values for each Element then choose an Action below:

Create Accounting String:

Select Organization: FINANCIAL MANAGEMENT Sel. Organization

Fiscal Year	Select Value	2007	Required
EBFY	Select Value	SEC	Required
Fund	Select Value	0100	Required
Org Code	Select Value	61000	Required

Choose an Action:

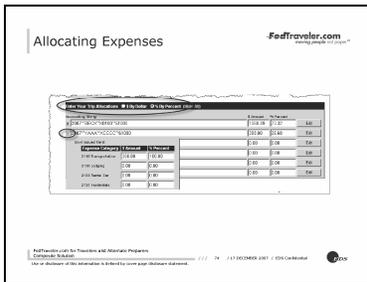
Clear Accounting String
Submit Accounting String

Accounting String Setup Page

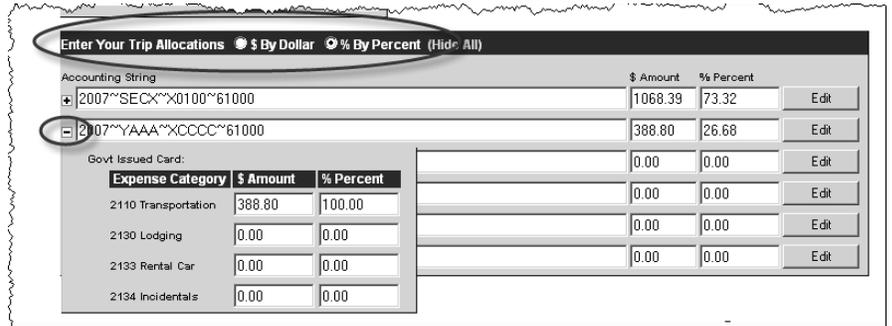
6. Use the **Select Value** buttons to modify or populate the required fields and then click the **Submit Accounting String** button to save your changes and return to the **Financial Summary** page.

If you added an Accounting String, you can allocate expenses to it by Amount or Percent.

7. To enter an Amount, click the **\$ By Dollar** radio button next to **Enter Your Trip Allocations**. To enter a Percent, click the **% By Percent** radio button.
8. Click the **plus sign** next to the desired Accounting String and enter an Amount or Percent in the field next to the Expense Category to which you wish to allocate.
9. Click outside the field once you have entered the Amount or Percent.



Slide 74: Allocating Expenses By Dollar or by Percent



Allocating Expenses By Dollar or By Percent

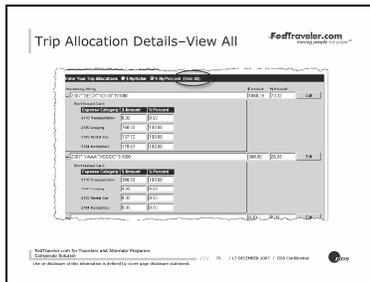
When you enter an Amount or Percent and click outside the field, the Accounting Strings update automatically and display the newly allocated Amounts and Percents.

- Click the **minus sign** to hide the Accounting String details.

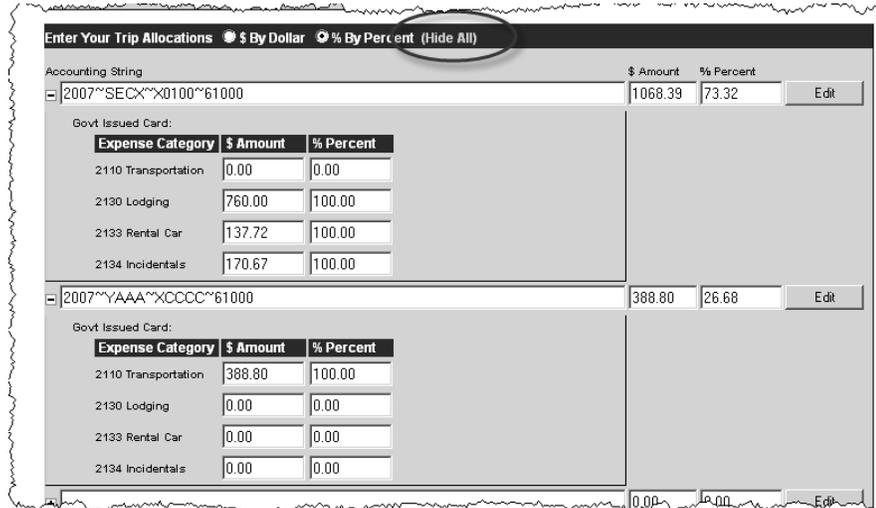


Hint

To view all the Trip Allocation details, click the **View All** link at the top of the **Enter Your Trip Allocations** section. Click the **Hide All** link to hide the details.



Slide 75: Trip Allocation Details – View All



Trip Allocation Details – View All

Requesting a Travel Advance

If your Agency allows travel advances, you can request one on the **Financial Summary** page. FedTraveler.com automatically calculates the amount to be advanced based on your Summary of Expense Categories and Agency business rules.

Follow this procedure to request a travel advance:

1. On the **Financial Summary** page, in the **Advance Type** box, select the means through which you can access the advanced funds.

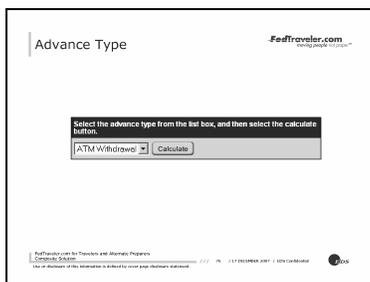


Advance Type

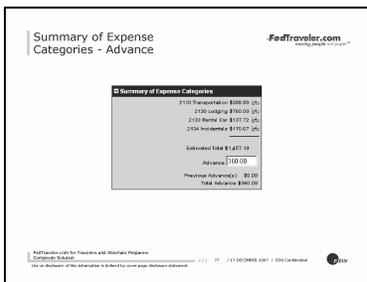
Note: Funds are disbursed by Treasury check, EFT, cash payment, or ATM withdrawal using your Government credit card, depending upon your Agency's business rules.

2. Click the **Calculate** button.

The **Advance** field in the **Summary of Expense Categories** box is populated with the pre-determined amount.



Slide 76: Advance Type



Slide 77: Summary of Expense Categories - Advance

Summary of Expense Categories	
2110 Transportation	\$388.80
2130 Lodging	\$760.00
2133 Rental Car	\$137.72
2134 Incidentals	\$170.67
<hr/>	
Estimated Total	\$1,457.19
Advance	<input type="text" value="360.00"/>
Previous Advance(s)	\$0.00
Total Advance	\$360.00

Summary of Expense Categories – Advance

Submitting Your Travel Plan

Before you submit your Travel Plan, you may have the option to select an Approval Chain other than your default if necessary.

Follow this procedure to submit your Travel Plan:

1. To submit your Travel Plan for approval through a different Approval Chain, select the **Change Routing** menu option. To use your normal Approval Chain, skip steps 2 through 5.
2. On the **Change Approval Chain** page, select an option from the dropdown list.

Hint

To see a list of Approvers who are in the selected Approval Chain, click the **Describe** button. A Description box displays at the bottom of the page.



3. Click the **Return to Fin. Summ.** Menu option.
A dialog box displays, asking you to confirm your action.
4. Click the **OK** button.
*The **Financial Summary** page displays.*



Hint

If you do not have complete information to get your Travel Plan approved, you can put the document “on hold” at this point. Select the **Hold Document** menu option. Your Travel Plan is listed on the **My Travel Desktop** page with a status of On Hold.

5. Click the **Submit Document** menu option.

*The **My Travel Desktop** page displays. The Travel Plan now has a status of **Under Review**.*



Watch Out!

Once you have submitted your Travel Plan for approval, FedTraveler.com will no longer update it with information about reservations you change using the OBE or your TMC. You may enter this information manually on the **Reservations** page.

FedTraveler.com generates alert e-mails to Travelers when an itinerary linked to a Travel Plan is changed using the OBE or by calling your TMC. If the itinerary and the Travel Plan have different information, you will be reminded to update your Travel Plan. Refer to **Amending Travel Plans** later in this lesson.

Making Rail Reservations

When you select Train as the travel mode in your Travel Plan, you can search for and reserve available roundtrips on Amtrak using the OBE.

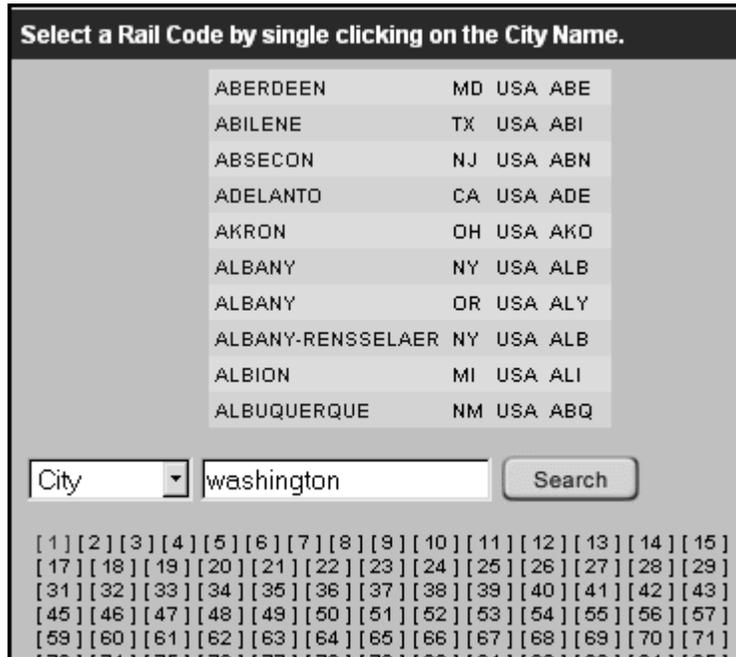
To make rail reservations, do the following:

1. On the **My Travel Desktop** page, click the **Travel Plan Creation** menu option.
2. In **Segment Details**, enter the city and state of departure.
3. Click the **Rail Codes** menu option.

*The **Rail Code** page displays.*



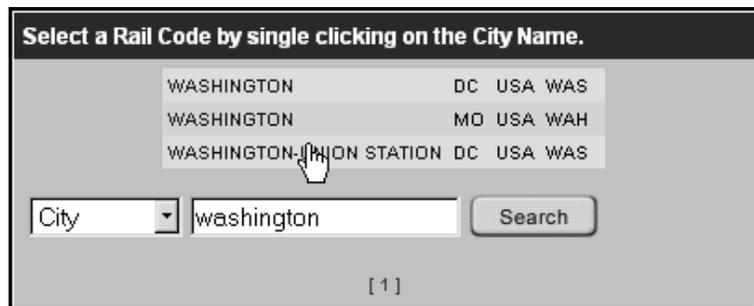
Slide 78: Rail Codes Menu



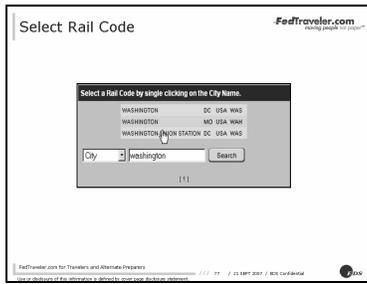
Rail Code Page

4. Type the complete city name for the departure city, then click the **Search** button.

The search results display on the **Rail Codes** page.



Rail Codes Page – Search Results



Slide 79: Select Rail Code

- Click the line for the rail code that corresponds to the correct departure city.

*The rail code populates into the **Airport Code** field in the segment details.*

- Select the Purpose of trip, and then click the **Add** button.

*The first segment of your trip is listed to the right of the **Segment Details** box.*

- Repeat steps 2-5 for the remaining segments of your rail travel, making sure to select Train as the travel mode.

- Click the **Reservations** menu option.

*The **Reservations** page displays.*

- Select a Departure time for all segments.

- Click the **Online Booking** menu option.

*The OBE opens and searches for train schedules for your rail travel segments. The **QuikQuote** page displays the search results.*

- Find the roundtrip option of your choice and click the **Amtrak Fare** link next to the best available fare for that schedule.

*The **Reserve Itinerary** page displays your complete itinerary.*

- You may enter remarks regarding this itinerary.

- Review your itinerary for accuracy and then click the **Reserve** button to book the trains.

*Click the **Back** button if you need to modify the itinerary before you proceed with the booking.*

- When the **Itinerary** page displays, note any ticketing time limit.

- Click the **Return to Segment** button to exit the OBE and go back to your Travel Plan.

To continue with hotel and rental car reservations, proceed to the appropriate sections in this lesson.



Slide 80: International Date Line

Planning Foreign Travel

When creating trip segments for foreign travel, you must be aware of the impact of time zones to your schedule.

Follow this procedure for planning foreign travel:

1. On the **My Travel Desktop** page, select the **Travel Plan Creation** menu option.

*The **Travel Plan** page displays.*

2. Enter your travel segments. **FC** (for Foreign Country) is the State Code for destinations other than the fifty United States and Puerto Rico.

See section on *Entering Travel Segments* in this lesson for reference.

3. Select the **Reservations** menu option.

*The **Reservations** page displays.*

4. Select the departure times from the dropdown list for each travel segment.

5. Select the **Online Booking** menu option to book your travel arrangements.

See *Making Reservations* in this lesson for reference.

6. Complete and submit your Travel Plan.

See previous sections in this lesson for complete procedures.



Hint

There are no Airline City Pair Program options for international travel except between some U.S. gateway cities and foreign cities. You will need to select the airfare option that best meets your Agency's business rules. Be sure to book international flights as far in advance as possible. *Note the time and date differences between your departure city and the international destination when planning your arrival date.* U.S. flag carriers are usually not available for flights within or between foreign countries. See the Section on *Making Air Reservations* regarding providing a reason for selecting non-contract airlines/fares.

Note that many hotels in foreign cities are not FEMA-certified.

Note also that hotel room availability may include run-of-the-house (ROH) rooms, which are guaranteed rooms with standard features. The actual room type is not assigned until check-in, based on availability at that time.

Amending Travel Plans

You may need to amend a Travel Plan that has already been approved for any of the following reasons:

- To change travel dates
- To change destination cities
- To add travel segments
- To change per diem allowances

Refer to the sections in this lesson for guidance. You apply the same procedures you used in creating Travel Plans when you amend a Travel Plan. However, you must provide a reason for the amendment on the **Comments** page.

Watch Out!

Currently, when a Traveler creates a Travel Plan for a one-day trip and selects the **Check here if trip is 12 hours or less** box to indicate that the trip is less than 12 hours, the system correctly sets the **Max Lodging** to \$0.00 on the **Reservations** page. If the Traveler then modifies the Travel Plan by adding an additional day, the system does not recognize this action and the **Max Lodging** amount remains at \$0.00.

If there are no reservations associated with the document, cancel the existing Travel Plan and create a new Travel Plan without selecting the **Check here if trip is 12 hours or less** box. If there are reservations associated with the document, you need to contact the FedTraveler.com Call Center for a data adjustment.

Follow this procedure to amend a Travel Plan:

1. On the **My Travel Desktop** page, select the radio button for the approved Travel Plan that you need to amend.
2. Click the **Amend Document** button.
*The **Travel Plan** page displays.*
3. To change a city or travel date, select the **MOD** link in the row for the city that is affected. Make your changes in the **Segment Details** box and then click the **Modify** button.
*In the **Segment Details** box, the **Add** button is replaced by the **Cancel** and **Modify** buttons when in the **Edit** mode.*
4. To add travel segments, select the **DEL** link for the last city in your travel segments table and use the **Segment Details** box to add the new segments. When finished, re-create your Return Home segment.

5. On the **Travel Plan** page, select the **Comments** menu option.

*The **Comments** page displays.*

6. State the reason for the amendment. To exit, select the **Return to Plan** menu option.
7. Complete and resubmit your Travel Plan.

See previous sections of this lesson for complete procedures.



Key Point

On the **My Travel Desktop** page, your original Travel Plan shows a status of **Amended**. A new document is added to the list as an **Amended Plan** (under **Type**) with a status of **Under Review**.



Key Point

You are not allowed to reduce the amount of a travel advance on an amended Travel Plan.



Watch Out!

When multiple modifications are made to a Travel Plan, the system will sometimes allocate amounts incorrectly. As a result, the following errors randomly occur:

- Multiple lodging charges for the same day of travel.
- Lodging charged on the last day of travel/return home segment.
- Rental Car amounts erroneously multiplied.
- Missing travel segments.
- Duplicate segment numbers.
- Incorrect M&IE.

If you encounter any of these errors, please call the FedTraveler.com Call Center.

Changing Reservations - Itinerary Synchronization

The purpose of Itinerary Synchronization (Itin Sync) is to ensure that your FedTraveler.com Travel Plan and your Online Booking Engine (OBE) Itinerary are identical.

When you change the date of air, car, hotel, or rail travel on your **Travel Plan**, FedTraveler.com alerts you via e-mail that your OBE Itinerary is out of sync. The e-mail instructs you to make the appropriate changes to your OBE Itinerary so that it is synchronized with your Travel Plan.

FedTraveler.com will also alert you via e-mail that your Travel Plan is out of sync when you change the date of air, car, hotel, or rail travel on your **OBE Itinerary**. The e-mail instructs you to make the appropriate changes to your Travel Plan so that it is synchronized with your OBE Itinerary.

Synchronizing Existing Travel Plans

For existing Travel Plans, FedTraveler.com makes every effort to synchronize FedTraveler.com Travel Plans with Itinerary data received from the OBE.

After receiving Itinerary information from the OBE, FedTraveler.com checks the Itinerary details against the existing Travel Plan. If the dates on the itinerary do not match the dates on the Travel Plan, FedTraveler.com sends an e-mail alert informing you of the discrepancy between the Travel Document and the associated Itinerary.

In Addition to the e-mail, FedTraveler.com displays a warning on your **Travel Plan** page. The warning indicates the Itinerary segments that could not be synced with a FedTraveler.com segment. Follow the directions included in the e-mail or the warning to synchronize the Travel Plan with the Itinerary.



Hint

If the return date has been extended, the **Return Home** segment must be deleted prior to modifying the previous segment.

4. Update the appropriate segment with the correct information and then click the **Modify** button.

*In the **Segment Details** box, the **Add** button is replaced by the **Cancel** and **Modify** buttons when in the Edit mode.*

5. Repeat steps 3 and 4 for each segment that needs to be modified.
6. Once all segments are updated, complete and submit your Travel Plan.

See previous sections of this lesson for complete procedures.

Modifying an Itinerary

If you determine that your Travel Plan is correct, you can modify your Itinerary to match your Travel Plan.

Follow this procedure to modify your Itinerary:

1. From the Organizer Page, click the Itineraries menu option.

*The **OBE** page displays.*

2. Select the radio button next to the Itinerary you want to modify and click the **Select** button.
3. Click the appropriate link to modify your airline, hotel, or car rental reservation.
4. Make the necessary modifications and click the **Next** button.

*The **FlashFacts** page displays.*

5. **Select** the link for your flight.
6. Click the **Next** button to check fare options for your selected flight.

*The **QuikQuote** page displays.*

7. Select from the available options.

*The **Confirm Itinerary Changes** page displays for your review.*

8. Click the **Change Itinerary** button at the bottom of the page to reserve the new Itinerary and delete your original Itinerary.

Watch Out!

Currently, the OBE is not allowing Travelers to change reservations for approved Travel Plans. If you need to change reservations, please contact your Travel Management Center (TMC) or delete the Travel Plan and create a new one.

Updating a TMC-Generated Travel Plan

Occasionally, it is necessary to initiate travel directly through your Travel Management Center (TMC). In such cases, a Travel Plan is automatically generated on your **My Travel Desktop** page by the Itin Sync process. However, because the travel was initiated through your TMC, it is not possible for FedTraveler.com to discern the travel origination and destination information.

Follow this procedure to update TMC-generated Travel Plans with the correct origination and destination information:

1. On the **My Travel Desktop** page, select the radio button next to the Travel Plan with a final destination of "QA.OBE.GENERATED."

2. Click the **Open Document** menu option.

*The **Travel Plan** page displays.*

3. Starting with the first segment, update the City/State, Country Code, Airport Code, Travel Mode and Payment Type for each segment of the trip by selecting the **MOD** link in the row next to the segment. Make your changes in the **Segment Details** box and then click the **Modify** button.

*In the **Segment Details** box, the **Add** button is replaced by the **Cancel** and **Modify** buttons when in the Edit mode.*

4. Once all segments are updated, complete and submit your Travel Plan.

See previous sections of this lesson for complete procedures.

Watch Out!

By updating the segments in order, you are assured to get the proper per diem rates. If you update the travel segments in any order other than from top to bottom, the per diem rates will not be correct.

Duplicating a Travel Plan

You can duplicate an existing Travel Plan for yourself or another Traveler. This saves you the time and trouble of reentering duplicate travel segments and travel options.



Key Point

You can duplicate a plan even if it has a status of Canceled. You can only duplicate a Travel Plan if it is for travel that begins on today's date or later.

Follow this procedure to duplicate a Travel Plan:

1. On the **My Travel Desktop** page, select the Travel Plan to be duplicated.

2. Select the **Duplicate Travel Plan** button.

*The **Traveler Profile List** page displays.*

3. From the user list, click the name of the Traveler for whom you are duplicating your Travel Plan.

*The **Travel Plan** page displays with the selected Traveler's name populated.*

4. Complete and submit the Travel Plan adjusting travel dates as necessary. Remember to make new reservations for this new trip.

*When you submit the Duplicate plan for another Traveler, the document displays on the **My Travel Desktop** page of that Traveler as well as on your own.*



Knowledge Check - Travel Plans

Scenario 1: Basic Travel Plan

You are assigned to attend training in San Diego, CA, on 10/3/20yy. Create a Travel Plan with the following specifics.

1. Segment details:
 - a. Start from your default location to San Diego, CA
 - b. **Purpose of Trip:** Training
 - c. Stay for 4 days (return on 10/7/20yy)
 - d. **Payment Type:** Govt Issued Card
 - e. **Travel Mode:** Contract Flight
 - f. **Segment Type:** Includes Meals & Lodging
2. Reservation Info: Manually enter the following reservations:
 - a. Air: US Airways, flight # 1564, \$258; return flight #2314
 - b. Hotel: Marriott, per diem rate
 - c. Car: Alamo, Economy, \$25/day
3. Other Expenses:
 - a. Airport Parking: \$40
 - b. Mileage: 25 miles (one way)
 - c. Tolls: \$6
4. Submit the Travel Plan for approval.
5. Review the Accounting String entries
6. Click the **Submit** button.

Scenario 2: Using the OBE

You are going to a three-day training session. The training starts on Wednesday, 6/1/20yy, and will take place in St. Louis, MO, at the Hilton on Natural Bridge Road. You will not need a rental car since the hotel has airport shuttle service. The rooms have been blocked under code XLY123. Create the Travel Plan for this trip. Use the OBE to reserve your flights. Submit your plan for review when it is complete. Remember to click the **Reserve** button to create your Itinerary.

Scenario 3: Travel by Train

You have to go to a Fraud conference in New York City (Penn Station), starting 6/13/20yy. You decided to take the train up from Washington, DC (Union Station). All you have to pay for is the registration fee of \$1275. Create an appropriate Travel Plan to reflect this situation. Remember to add **Other Expenses** as necessary or appropriate, and then submit your plan for approval. Remember to click the **Reserve** button to create your Itinerary.

Scenario 4: Multiple Destinations

The travel dates go from 6/7/20yy to 6/11/20yy.

On June 7, fly from National Airport (DCA), to Chicago O'Hare (ORD). Then, on the same day, fly to Portland, OR. Also on the same day, take a rental car to Seattle, WA, where you will stay for the rest of the trip. Fly back to DCA from Seattle (SEA).

Designate June 10 as a personal day. Be sure to submit your document.

Remember: Click the **Reserve** button to create your Itinerary.

Scenario 5: Land Segments

Enter a Travel Plan for a trip from Brunswick, GA, to Artesia, NM, with an overnight stay in El Paso, TX, on BOTH the outbound and return legs. You will arrive in El Paso on Aug. 7 and stay overnight. On Aug. 8, you will drive to Artesia in a rental car. On Aug. 10, you will drive back to El Paso and again stay overnight. You will return to Brunswick on Aug. 11.

Scenario 6: International Seminar

You have been asked to attend an international seminar taking place in Frankfurt, Germany. The seminar starts on July 1, 20yy, and ends on July 6, 20yy. The hotel hosting the seminar does not have any more rooms within the per diem so you need to increase your Lodging allowance by \$25.00. Be sure to select the appropriate flights (American Flag Act). Reserve your itinerary and add other expenses as appropriate. Then submit your plan for approval.

Scenario 7: Crossing the IDL

You have been asked to attend another international seminar that takes place in Hong Kong. The seminar starts on August 1, 20yy, and ends on August 6, 20yy. Note the IDL crossing and the day you have to depart the U.S. to arrive in Hong Kong in time for the first day of the seminar. The hotel hosting the seminar does not have any more rooms within the per diem so you need to increase your lodging allowance by \$50.00. Be sure to select appropriate flights (Fly America Act). Reserve your itinerary. Also include expenses for taxi to/from the seminar site.

Immediately following the conference, you are tasked with a site visit to Perth, Australia. You will need to stay in Perth until August 15, 20yy. Secure a hotel and include expenses for taxi to/from the seminar site.

Knowledge Check - Amended Travel Plans

Scenario 1: Increased Lodging

You suddenly realize that the hotel in San Diego (Scenario 1 in *Knowledge Check – Travel Plans*) is \$30 more than the allowed per diem for lodging. You need to adjust the lodging amount on the Travel Plan to get reimbursed properly.

Scenario 2: Extra Day

While on travel in Frankfurt (Scenario 6 in *Knowledge Check – Travel Plans*), you realize you must stay for one extra day. Since you booked the YCA (Government contract) fare, you know you will have no problem taking a flight the next day, but you will need to adjust your Travel Plan accordingly. Make the necessary amendments to this Travel Plan and resubmit.

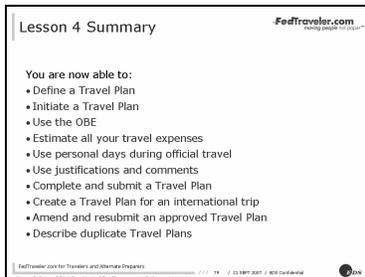
Knowledge Check - Duplicate Plan

Take a colleague with you to San Diego (from Scenario 1 in *Knowledge Check – Travel Plans*). Duplicate this plan and make the necessary manual entries.

Lesson 4 Summary

Having completed Lesson 4, you are now able to:

- Define a Travel Plan
- Initiate a Travel Plan
- Use the OBE
- Estimate travel expenses
- Recall the procedure for taking personal days during official travel
- Use justifications and comments
- Complete and submit a Travel Plan
- Create a Travel Plan for an international trip
- Amend and resubmit an approved Travel Plan
- Know when and how to use duplicate Travel Plans



Slide 81: Lesson 4
Summary

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Lesson 5: Document Control

Introduction

This lesson provides information about the document controls that allow you to open, view, print, and delete Travel Documents. You will learn how you can return to an unfinished document or track its progress after submission. The Document Control feature also allows you to put a document on hold even if it is already under review.

Lesson 5 Objectives

After completing this lesson, you will be able to:

- Return to a Travel Document that is Incomplete, On Hold, Returned or Declined
- Track a Travel Document that is under review
- Compare the different viewing options for a Travel Document
- Identify other functions on the **Document Control** page, including Print, Hold, and Submit

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Lesson 5 Objectives

After completing this lesson, you will be able to:

- Return to a travel document that is Incomplete, On Hold, Returned, or Declined
- Track a travel document that is under review
- Compare the different viewing options for a travel document
- Identify other functions on the **Document Control** page, including Print, Hold, and Submit

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Slide 82: Lesson 5 Objectives

Viewing and Printing a Travel Document

You can view and print any Travel document regardless of its status. Document Control enables you to see the history of the document, view a summary of the details, or display the document in print-ready format.

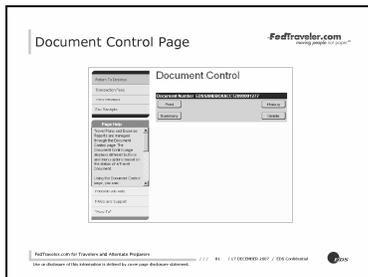
Document Views:

- **Summary view:** Displays the details of a Travel Document such as daily breakdown of estimated expenses, the travel itinerary, and trip allocations information.
- **History view:** Shows all actions taken on a Travel Document in chronological order from creation to its current status.
- **Print preview:** Displays the details of a Travel Document in a print-ready format.

To view and print a Travel Document, do the following:

1. On the **My Travel Desktop** page, select the radio button of the document to be viewed and printed.
2. Click the **Document Control Options** button.

*The **Document Control** page displays.*



Slide 83: Document Control Page

Return To Desktop

Transaction Fees

View Receipts

Fax Receipts

Page Help

Travel Plans and Expense Reports are managed through the Document Control page. The Document Control page displays different buttons and menu options based on the status of a Travel Document.

Using the Document Control page, you can:

Printable Job Aids

FAQs and Support

"How To"

Document Control

Document Number EDSSANDBOXACCTZ080001277

Print

History

Summary

Delete

Document Control Page

3. To view a history of the actions performed on the Travel Document up to its current status, click the **History** button. To exit, select the **Return to Doc.** menu option.
4. To view the Travel Document in summary format, click the **Summary** button. To exit, select the **Return to Doc. Control** menu option.
5. To preview the Travel Document for printing, click the **Print** button or click the **Print** link above the upper right corner of the document.
6. To exit, click the **Back** button in the upper left corner of the document.



Watch Out!

When printing a Travel Document or Expense Report from the **Document Control** page, the lower portion of the page may be cut off. Because of this system issue, important text, such as the Approving Officer Signature, may not be printed.



Watch Out!

When you request a cash advance, the cash advance amount does not appear in the **Advance Authorized** field on the **Travel Plan Print** page.

To compensate for this, print the **Travel Plan Summary** page and attach it to the **Travel Plan Print** page. The Advance Authorized amount displays correctly on the **Travel Plan Summary** page.



Watch Out!

When printing **Local Expense Reports**, the Voucher Number is omitted from the **Voucher Number** field.



Watch Out!

When printing **Expense Reports** for Travel where the itinerary has been updated *after* the trip has been completed, the **Summary of Payment Total** may not calculate correctly on the **Expense Report Print** page.

If this occurs, please contact the FedTraveler.com Call Center for a data adjustment.



Watch Out!

When you click the **Back** button on the **Expense Report Print** page, the system may not return you to the **Document Control** page. If this occurs, all data fields except for the **Document Number** and **Transaction Fee** are cleared on the page. To remedy this, please log out of FedTraveler.com and log back in to view the document data.

7. To view details of transaction fees for this document, click **Transaction Fees** in the menu on the left.
8. To exit the Document Control page, select the **Return to Desktop** menu option.

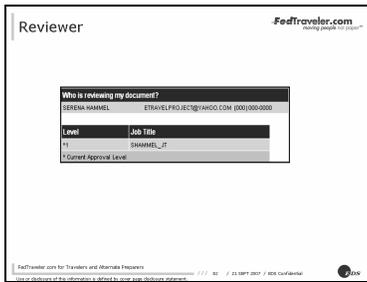
Tracking a Travel Document Under Review

When your Travel Document has been submitted and is under review, you can use the Document Control feature to find out who in your Approval Chain currently has the document and the current Approval level.

Follow this procedure to track a Travel Document that is under review:

1. On the **My Travel Desktop** page, select the radio button of the document with a status of **Under Review**.
2. Click the **Document Control Options** button.

*The **Document Control** page displays.*



Slide 84: Reviewer

Who is reviewing my document?	
SERENA HAMMEL	ETRAVELPROJECT@YAHOO.COM (000)000-0000
Level	Job Title
*1	SHAMMEL_JT
* Current Approval Level	

Reviewing Page

3. On the **Document Control** page, see the name of the current reviewer as well as the Approval levels through which the document is routed.
4. To exit, select the **Return to Desktop** menu option.



Watch Out!

If a System Administrator deletes one of the Job Titles in your Approval Chain while your Travel Plan is under review, your document will not be assigned to an Approver when it reaches the level for the deleted Job Title. If this happens, place the document “on hold” using the Document Control options, and then resubmit it.

Using Other Features of Document Control

Document Control enables you to perform other actions on your Travel Documents, including the following:

- Open a Travel Document with a status of **Incomplete, On Hold, Returned** or **Declined**.
- Put on hold a Travel Document with a status of **Under Review**.
- Submit a Travel Document with a status of **On Hold**.
- Delete a Travel Document with a status of **Incomplete, On Hold, Returned** or **Declined**.

Cancellations

Travel plans can change, sometimes at the last moment. It is simple to cancel a trip in FedTraveler.com using the **Delete** button on the **Document Control** page.

To cancel or delete a Travel Document with a status of **Incomplete, On Hold, or Approved**, do the following:

1. On the **My Travel Desktop** page, click the radio button in front of the Travel Document to be cancelled.
2. Click the **Document Control Options** button.

*The **Document Control** page displays.*

3. Click the **Delete** button.

*You are returned to the **My Travel Desktop** page.*

Travel Documents with a status of **Incomplete** or **On Hold** are completely removed from the list on **My Travel Desktop**.



Hint

When you delete a Travel Plan for which you have made reservations, FedTraveler.com displays a warning message notifying you that the reservations will also be cancelled. The message also advises if any Transaction Fees have been incurred. If so, a TMC Transaction Fee document will be automatically generated.



Watch Out!

If the Travel Document to be cancelled has a status of **Under Review**, the **Delete** button on the Document Control page is replaced by a **Hold** button. Click the **Hold** button. You are returned to **My Travel Desktop**. The Travel Document's status is changed to **On Hold** and it may now be deleted by following the steps to delete a Travel Document.



Watch Out!

When you cancel a Travel Plan, the corresponding Itinerary cancellation generates a cancellation e-mail from the OBE. This e-mail sometimes contains your Approver's name in the subject line of the e-mail, making it appear as if the Approver canceled the Itinerary.

When an Approved Travel Plan is cancelled, the following will happen automatically:

- The original Travel Plan is canceled.
- An amended Travel Plan is generated with a status of Cancelled and displays in the list of documents on **My Travel Documents**.
- If reservations are associated with the Travel Plan, the reservations will be canceled.
- All travel costs except for applicable fees are zeroed out in the amended Travel Plan.
- If actual fees are applicable, the amended Travel Plan contains allocations for those fees. This Travel Plan is then automatically approved, and a Travel Plan and Authorization transaction for the amended Travel Plan is transmitted to your Agency.
- If fees apply, an Amended Expense Report for the actual fees is generated. This Expense Report is automatically approved. A Travel Vouchers and Claims transaction is then transmitted to your Agency.



Knowledge Check - Document Control

Circle the correct answer

1. What is the name of the link to Document Control on document pages?
 - a. Travel Plan
 - b. Return to Desktop
 - c. Return to Organizer
 - d. Doc. Control

2. Which of the following statuses does not allow you to open a document directly using the Open Document button?
 - a. Incomplete
 - b. Hold
 - c. Complete
 - d. Returned

3. Which option would you use to track a document's trail?
 - a. Print
 - b. Summary
 - c. History
 - d. Delete

-
4. Where do you look to find a detailed summary of the document?
 - a. Print
 - b. History
 - c. Hold
 - d. Summary

Lesson 5 Summary

Having completed Lesson 5, you are now able to:

- Return to a Travel Document which is Incomplete, On Hold, Returned or Declined
- Track a Travel Document that is under review
- Compare the different viewing options for a Travel Document
- Identify other functions on the Document Control page, including Print, Hold, and Submit.

Lesson 5 Summary FedTraveler.com
moving people not papersm

You are now able to:

- Return to a travel document that is Incomplete, On Hold, Returned, or Declined
- Track a travel document that is Under Review
- Compare the different viewing options for a travel document
- Identify other functions on the **Document Control** page, including Print, Hold, and Submit

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Slide 85: Lesson 5
Summary

Lesson 6: Alternate Preparers

Introduction

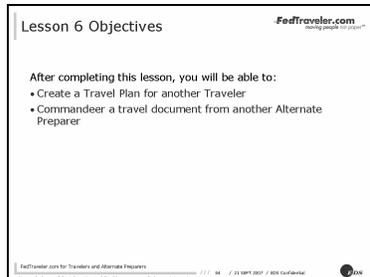
This lesson provides an overview of the main tasks of Alternate Preparers. Alternate Preparers in an Agency belong to a special level of access granted by a System Administrator. They may be granted access to prepare travel within their own organization or across multiple organizations in their Agency.

You will learn to use FedTraveler.com to prepare and submit basic Travel Plans on behalf of other Travelers. Alternate Preparers can also prepare special Travel Plans (Blanket, Group, Sponsored, Non-Fed Sponsored, Long Term TDY and NTE Travel Plans), which you will learn about in Lesson 7. You will also learn how to gain control of a Travel Document that was created for you by another Alternate Preparer.

Lesson 6 Objectives

After completing this lesson, you will be able to:

- Create a Travel Plan for another Traveler
- Commandeer a travel document from another Alternate Preparer



Lesson 6 Objectives

After completing this lesson, you will be able to:

- Create a Travel Plan for another Traveler
- Commandeer a travel document from another Alternate Preparer

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Slide 86: Lesson 6 Objectives

Initiating a Travel Plan as an Alternate Preparer

To create a basic Travel Plan as an Alternate Preparer, you will need to know the Traveler's name, the travel dates, and the destination(s) of the trip. It is also important to have the reason for the Travel Plan (listed in FedTraveler.com as Purpose types) ready for entry.

After you prepare and submit a Travel Plan for another Traveler, the Travel Plan displays on both the Traveler's and the Alternate Preparer's **My Travel Desktop** page.

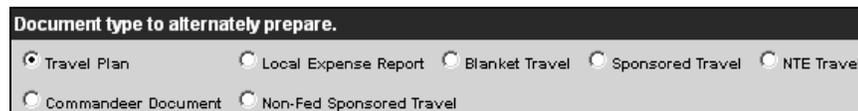
Alternate Preparers may view and change Itineraries prepared for their managed Travelers. Travelers may view and change Itineraries prepared by their Alternate Preparers.

Follow this procedure to initiate a Travel Plan as an Alternate Preparer:

1. On the **My Travel Desktop** page, select the **Alternate Preparer** menu option.

*The **Traveler Profile List** page displays.*

2. Select the Travel Plan radio button in the **Document type to alternately prepare** box.



Document type to alternately prepare.

Travel Plan Local Expense Report Blanket Travel Sponsored Travel NTE Travel

Commandeer Document Non-Fed Sponsored Travel



Hint

To find a Traveler from another Organization where you are also authorized to be an Alternate Preparer, select the Organization from the dropdown list, then search by name using the criteria fields.

3. From the user list, click the name of the Traveler for whom you are preparing a Travel Plan.

*The **Travel Plan** page displays with the selected Traveler's name shown.*

4. Proceed to build the Travel Plan.

See Lesson 4 for the procedures for entering travel segments, making reservations, adding supplementary information, and completing a Travel Plan.

Initiating a Special Travel Plan as an Alternate Preparer

An Alternate Preparer can also create certain special Travel Plans on behalf of other Travelers:

- Blanket
- Sponsored
- Non-Fed Sponsored
- NTE
- Long-term TDY

To initiate a special Travel Plan for another Traveler, start with the following steps:

1. Select the **Alternate Preparer** menu option on the **My Travel Desktop** page.
2. On the **Traveler Profile List** page, under Document type, select the special Travel Plan.
3. Select the name of the Traveler for whom you are creating the Travel Document.

Go to Lesson 7, *Special Travel Plans*, and follow the procedures for the corresponding Travel Plan.

Commandeering a Travel Document

Alternate Preparers may need to take over a Travel Document that was submitted by a Traveler or another Alternate Preparer.

Follow this procedure to commandeer a Travel Document:

1. On the **My Travel Desktop** page, select the **Alternate Preparer** menu option.
*The **Traveler Profile** list displays.*
2. Click the radio button for **Commandeer Document**.



Hint

To find an Alternate Preparer from another Organization for which you are authorized, select an Organization from the dropdown list, and then search by name using the appropriate criteria fields.

3. From the name list, click the name of the Alternate Preparer who created the Travel Document you want to commandeer.

*The **Commandeer Document** page displays.*

4. Select the link for the Travel Document you want to commandeer.

*A **confirmation message** displays.*

5. Click the **OK** button.

*The **My Travel Desktop** page displays with the commandeered document added to your Travel Document list.*



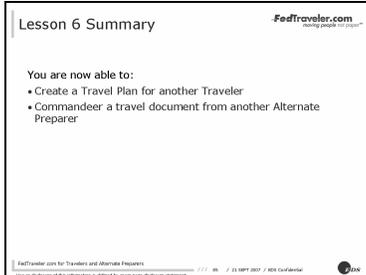
Knowledge Check - Alternate Preparers

Circle the correct answer.

1. To initiate a Travel Plan on behalf of someone else, what is the first step you take?
 - a. Click the Travel Plan Creation menu option
 - b. Click the Alternate Preparer menu option
 - c. Click the Return to Desktop menu option
 - d. Click the Home link

2. Taking control of another person's document is called:
 - a. Document Control
 - b. Commandeering
 - c. Sponsoring
 - d. NTE

3. What is the second step of an Alternate Preparer?
 - a. Make a selection from the **Document Type** box
 - b. Select the Traveler for whom you are making travel arrangements
 - c. Click the **Return to Plan** menu option
 - d. Do nothing



Slide 87: Lesson 6 Summary

Lesson 6 Summary

Having completed Lesson 6, you are now able to:

- Create a Travel Plan for another Traveler
- Commandeer a Travel Document from another Alternate Preparer

Lesson 7: Special Travel Plans

Introduction

This lesson introduces you to the various Travel Plans that are specifically defined for a special circumstance. Some of these plans are created as an authorization for Special Travel. These special authorizations are then used as the basis for the actual Travel Plan created by a Traveler or an Alternate Preparer.

Lesson 7 Objectives

After completing this lesson, you will be able to:

- Use Constructive Travel in conjunction with a POV Travel Plan
- Prepare a Blanket Travel Plan
- Create a Travel Plan based on a Blanket authorization
- Prepare a Long Term TDY Travel Plan
- Create a Travel Plan based on a Long Term TDY authorization
- Create and know when to use a Group Travel Plan, Sponsored Travel Plan, Non-Fed Sponsored Travel Plan, and Not to Exceed (NTE) Travel Plan

Lesson 7 Objectives 

After completing this lesson, you will be able to:

- Use Constructive Travel in conjunction with a POV Travel Plan
- Prepare a Blanket Travel Plan
- Create a Travel Plan based on a Blanket authorization
- Prepare a Long Term TDY Travel Plan
- Create a Travel Plan based on a Long Term TDY authorization
- Create and know when to use a Group Travel Plan, Sponsored Travel Plan, Non-Fed Sponsored Travel Plan, and Not to Exceed (NTE) Travel Plan

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Slide 88: Lesson 7 Objectives

Using Constructive Travel

A Constructive Travel Plan is used in conjunction with a Travel Plan in which the principal travel mode is a POV. In the process of creating a plan that involves the POV travel, the Preparer needs to create a Constructive Travel Plan as a means to compare the advantage of using a personal vehicle against commercial transport.



Key Point

Unlike other Travel Plans, Constructive Travel does not display as a menu option on the **My Travel Desktop** page. You can find it instead on the **Financial Summary** page while you are in the process of creating a Travel Plan that involves the use of a POV.

Follow this procedure to use Constructive Travel:

1. Create a Travel Plan using **Privately Owned Vehicle** as the travel mode for the second and third segments.
2. Select the **Reservations** menu option after creating all your travel segments for your POV Travel Plan.

*The **Reservations** page displays.*

3. In the Segment box, click the **Click here to enter mileage** button.

*The **Private Auto** page displays.*

4. In the **Automobile** box, click the radio button next to the statement that best describes the reason for using a personal vehicle.



Key Point

If using a motorcycle or private plane, select the appropriate radio button. There are no "reasons" provided for these options.

5. In the **Number of Miles** field, enter the number of miles just for this segment, not round-trip.
6. Select the **Return to Reserv.** menu option.

*The **Reservations** page displays with the number of miles you just entered and the equivalent reimbursable dollar amount.*

7. Repeat steps 3 to 5 for every POV segment in your Travel Plan.
8. Proceed with online reservations for accommodations, as necessary. Otherwise, select the **Return to Plan** menu option.

See the lessons on *Making Reservations* for reference.

9. When finished, select the **Complete Plan** menu option on the **My Travel Desktop** page.

*The **Financial Summary** page displays showing the **Constructive** menu option.*

Refer to the instructions in Lesson 4 under *Completing Your Travel Plan*. Follow the steps, but do not submit the plan.

10. Select the **Constructive** menu option.

*A new **Travel Plan** page displays with the same segments from your POV plan.*

11. Select the **Reservations** menu option.

*The **Reservations** page displays.*

12. From the **Travel Mode** field dropdown list, select an alternative mode to compare with using a POV such as Contract Air or Train.

13. Proceed with online reservations.

See the lessons on *Making Reservations* for reference.



Slide 89: Constructive Travel Option

14. When finished, select the **Complete Plan** menu option on the **My Travel Desktop** page.

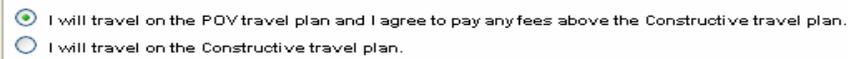
*The **Financial Summary** page displays, showing the **Comparison** menu option.*

15. Select the **Comparison** menu option.

*The **POV Travel Plan** and the **Constructive Travel Plan** are displayed next to each other with corresponding costs for each.*

16. Select the **Back to Top** menu option.

17. Click the radio button that reflects your decision on which Travel Plan to submit.



18. Proceed with Travel Plan submission.

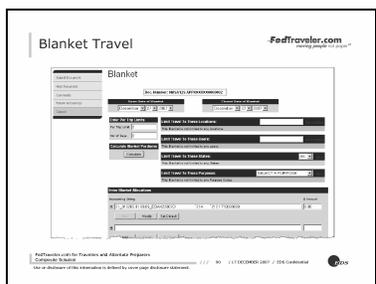
See the lesson on *Submitting Your Travel Plan* in Lesson 4 for reference.

Creating a Blanket Travel Plan

A Blanket Travel Plan is created for a specific purpose, limited to financial and geographic restrictions, and applies to specific Travelers in the organization. When approved, the Blanket plan is used by the authorized Travelers to create individual Travel Plans repeatedly as long as each trip's duration falls between the open and close dates of the Blanket Plan. These individual Travel Plans are automatically approved.

Be ready to provide the following parameters on the **Blanket** page for the Travel Document:

- Duration of Blanket
- Estimated expenses and allocations
- Trip amount limits
- Geographic locations
- Travelers to be included in the Blanket
- Purpose of travel



Slide 90: Blanket Travel

Submit Document

Hold Document

Comments

Return to Desktop

Cancel

Blanket

Doc. Number: NASA12S APPXXXXXX000002

Open Date of Blanket

December 27 2007

Closed Date of Blanket

December 27 2007

Enter Per Trip Limits

Per Trip Limit:

Nbr of Days:

Calculate Blanket Perdiems

Limit Travel To These Locations:

This Blanket is not limited to any locations.

Limit Travel To These Users:

This Blanket is not limited to any users.

Limit Travel To These States:

This Blanket is not limited to any States.

Limit Travel To These Purposes:

This Blanket is not limited to any Purpose Codes.

Enter Blanket Allocations

Accounting String	\$ Amount
± 21_015265 01 08 09_ESAX22007D ~21A ~2121*FC000000	0.00
<input type="button" value="Add"/> <input type="button" value="Modify"/> <input type="button" value="Set Default"/>	
±	

Blanket Travel Plan Page

To create a Blanket Travel Plan, do the following:

1. On the **My Travel Desktop** page, select the **Blanket Travel** menu option.
*The **Blanket** page displays.*
2. Use the dropdown lists to select the beginning and end dates of the Blanket Travel.
3. In the **Per Trip Limit** and **Nbr of Days** fields, enter an amount if necessary.
4. To restrict travel to a specific location (city), enter the first few letters of the city name in the **Limit Travel To These Locations** field and then click the **Select/Add** link.
A list of cities displays.
5. In the **Cities** list, select the name of the destination city, ensuring that you select the option with the correct airport code for a city that has multiple airports.
6. Repeat steps 4 and 5 to restrict travel to additional cities.
*The selected city displays in the **Limit Travel to These Locations** box. The Traveler's default location is also added. You can also use the Search function in the **Cities** list if your city does not display.*

7. To restrict travel to specific Travelers, enter the first few letters in the Traveler's name and then click the **Select/Add** link.
8. In the Names list, select the Traveler you wish to include.
9. Repeat steps 7 and 8 to include additional Travelers.

*The selected Traveler displays in the **Limit Travel to These Users** box. You can also use the Search function in the **Names** list if the Traveler's name does not display*

10. To restrict travel to a specific state, select the state abbreviation from the dropdown list in the **Limit Travel to These States** box, and then click the **Add** link. Repeat this step to restrict travel to additional States.

The selected state displays. The Traveler's default state is also added.

11. To restrict travel to a specific purpose, select the purpose from the dropdown list in the **Limit Travel to These Purposes** box, and then click the **Add** link. Repeat this step to add other acceptable purposes for the temporary assignment.

The selected purpose is added to the list.



Hint

If you add an incorrect item to any of the lists above, click the **Remove** link next to the item you want to remove. To remove an entire list, click the **Remove List** link in the list box.

12. In the **Calculate Blanket Per Diems** box, click the **Calculate** button.

*The Meals and Lodging per diem amounts display in the first line item of the **Enter Blanket Allocations** table. Click the **plus sign** next to the Accounting String to view the detail.*

13. To submit your Blanket Travel Plan for approval through a different Approval Chain, select the **Change Routing** menu option; otherwise, skip to step 17.
14. On the **Change Approval Chain** page, select an option from the dropdown list.



Hint

To see a list of Approvers who are in the selected Approval Chain, click the **Describe** button. A **Description** box displays below.

15. Select the **Return to Travel Plan** menu option.

A message pops up asking you to confirm your action.

16. In the message box, click the **OK** button.

*The **Blanket Travel** page displays.*



Hint

If you do not have complete information to get your Travel Plan approved, you can put the document on hold at this point. Select the **Hold Document** menu option. Your Travel Plan is listed on the **My Travel Desktop** page with a status of **On Hold**.

17. After defining your parameters, select the **Submit Document** menu option.

*The **My Travel Desktop** page displays, showing the Blanket Travel Plan with a status of **Under Review**.*

Creating a Travel Plan on Approved Blanket Travel

If you are one of the Travelers authorized to travel on the Blanket, you can create a Travel Plan against the approved Blanket Travel plan. When you submit the Travel Plan, it is automatically approved.

Authorized Travelers can repeatedly use the Blanket as long as the trip's duration falls within the time span of the approved Blanket.

To create a Travel Plan based on an approved Blanket travel, do the following:

1. On the **My Travel Desktop** page, click the radio button next to the approved Blanket authorization.
2. Select the **Travel Plan** menu option.

*The **Travel Plan** page displays, showing the limits defined in the Blanket.*



Limits On Travel Defined In Original Authorization
Travel is limited to dates between 09/15/2006 and 12/15/2006.
Travel is limited to the following users: TYAGI, BETH TYAGI, GREG TYAGI, HELEN TYAGI, JACK TYAGI, ZEUSS
Travel is limited to the following locations: BROOKLYN NS NEW YORK, NY USA ELIZABETH CITY CG SPT CTR, NC USA MANHATTAN, NY USA NEWARK, NJ USA QUEENS, NY USA STATEN ISLAND NS NEW YORK, NY USA THE BRONX, NY USA WASHINGTON, DC USA
Travel is limited to the following states: DC NJ NY
Travel is limited to the following purposes: INFORMATION MTG
Each travel plan created on this original authorization has a per trip limit of \$2,000.00.
Each travel plan created on this original authorization has a per trip limit of 6 days.
Travel is limited to \$0.00 in combined expenses from all related trips -- \$0.00 has been claimed to date on this and any previously claimed trips.

Slide 91: Limits on Blanket Travel

Blanket Travel Limits

- Using the limits as guidance, create and submit your Travel Plan.

See Lesson 4, *Creating Travel Plans*, for the complete procedures. A slight difference is that you will not need the option to change the approval routing because your Travel Plan is automatically approved.

Creating a Long Term TDY Travel Plan

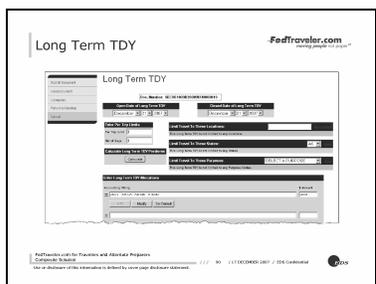
A Long Term TDY Travel Plan is used to cover an extended period of temporary duty travel, lasting at least 30 days but not more than 180. To prepare a Long Term TDY Travel Plan, you must define the parameters of the travel. Once approved, you can create the Travel Plan against the Long Term TDY authorization. The Travel Plan created against the Long Term TDY authorization is automatically approved. This special Travel Plan is not available to all Agencies.

Hint

Be ready to provide the following parameters on the **Long Term TDY** page for the Travel Document:

- Duration of long-term TDY
- Estimated expenses and allocations
- Trip amount limits
- Geographic locations
- Purpose of travel





Slide 92: Long Term TDY

- Submit Document
- Hold Document
- Comments
- Return to Desktop
- Cancel

Long Term TDY

Doc. Number: SECU61000B2008UU0000019

Open Date of Long Term TDY
 December 21 2007

Closed Date of Long Term TDY
 December 21 2007

Enter Per Trip Limits
 Per Trip Limit:
 Nbr of Days:
Calculate Long Term TDY Perdiems

Limit Travel To These Locations:
This Long Term TDY is not limited to any locations.

Limit Travel To These States: AK
This Long Term TDY is not limited to any States.

Limit Travel To These Purposes: SELECT A PURPOSE
This Long Term TDY is not limited to any Purpose Codes.

Enter Long Term TDY Allocations

Accounting String	\$ Amount
± 2007~SECX~0100~61000	0.00
<input type="button" value="Add"/> <input type="button" value="Modify"/> <input type="button" value="Set Default"/>	
±	

Long Term TDY Page

To create a Long Term TDY Travel Plan, do the following:

1. On the **My Travel Desktop** page, select the **Long Term TDY** menu option.
*The **Long Term TDY** page displays.*
2. Use the dropdown lists to select the beginning and end dates of the temporary assignment.
3. In the **Per Trip Limit** and **Nbr of Days** fields, enter an amount if necessary.
4. To restrict travel to a specific location (city), enter the first few letters of the city name in the **Limit Travel To These Locations** field and then click the **Select/Add** link.
A list of cities displays.
5. In the **Cities** list, select the name of the destination city, ensuring that you select the option with the correct airport code for a city that has multiple airports.
6. Repeat steps 4 and 5 to restrict travel to additional cities.

*The selected city displays in the **Limit Travel to These Locations** box. The Traveler's default location is also added. You can also use the Search function in the **Cities** list if your city does not display.*

7. To restrict travel to a specific state, select the state abbreviation from the dropdown list in the **Limit Travel to These States** box, and then click the **Add** link. Repeat this step to restrict travel to additional States.

The selected state displays. The Traveler's default state is also added.

8. To restrict travel to a specific purpose, select the purpose from the dropdown list in the **Limit Travel to These Purposes** box, and then click the **Add** link. Repeat this step to add other acceptable purposes for the temporary assignment.

The selected purpose is added to the list.



Hint

If you add an incorrect item to any of the lists above, click the **Remove** link next to the item you want to remove. To remove an entire list, click the **Remove List** link in the list box.

9. In the **Calculate Long Term TDY Per Diems** box, click the **Calculate** button.

*The Meals and Lodging per diem amounts display in the first line item of the **Enter Long Term TDY Allocations** table. Click the **plus sign** next to the Accounting String to view the detail.*

10. To submit your Long Term TDY Travel Plan for approval through a different Approval Chain, select the **Change Routing** menu option; otherwise, skip to step 14.
11. On the **Change Approval Chain** page, select an option from the dropdown list.

Hint

To see a list of Approvers who are in the selected Approval Chain, click the **Describe** button. A **Description** box displays below.

12. Select the **Return to Travel Plan** menu option.

A message pops up asking you to confirm your action.

13. In the message box, click the **OK** button.

*The **Long Term TDY** page displays.*





Hint

If you do not have complete information to get your Travel Plan approved, you can put the document on hold at this point. Select the **Hold Document** menu option. Your Travel Plan is listed on the **My Travel Desktop** page with a status of **On Hold**.

14. After defining your parameters, select the **Submit Document** menu option.

*The **My Travel Desktop** page displays, showing the Long Term TDY Travel Plan with a status of **Under Review**.*

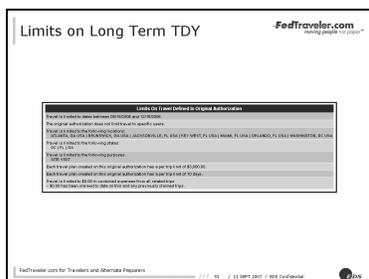
Creating a Travel Plan on Approved Long Term TDY Travel

You can create a Travel Plan against an approved Long Term TDY Travel plan. When you submit the Travel Plan, it is automatically approved.

To Create a Travel Plan based on an approved Long Term TDY Travel Plan, do the following:

1. On the **My Travel Desktop** page, click the radio button next to the approved Long Term TDY authorization.
2. Select the **Create Nested Trip** button.

*The **Travel Plan** page displays, showing the limits of the Long Term TDY authorization.*



Slide 93: Limits on Long Term TDY

Limits On Travel Defined In Original Authorization
Travel is limited to dates between 09/15/2006 and 12/15/2006.
The original authorization does not limit travel to specific users.
Travel is limited to the following locations: ATLANTA, GA USA BRUNSWICK, GA USA JACKSONVILLE, FL USA KEY WEST, FL USA MIAMI, FL USA ORLANDO, FL USA WASHINGTON, DC USA
Travel is limited to the following states: DC FL GA
Travel is limited to the following purposes: SITE VISIT
Each travel plan created on this original authorization has a per trip limit of \$3,000.00.
Each travel plan created on this original authorization has a per trip limit of 10 days.
Travel is limited to \$0.00 in combined expenses from all related trips -- \$0.00 has been claimed to date on this and any previously claimed trips.

Long Term TDY Limits

3. Select the **Long Term TDY Travel** check box.
4. Using the limits as a guide, create and submit your Travel Plan.

See Lesson 4, *Creating Travel Plans*, for the complete procedures. You will not need to use the option to change the approval routing because your Travel Plan is pre-approved.



Key Point

The Segment Type defaults to End Voucher instead of Return Home in a Travel Plan based on Long Term TDY travel. The End Voucher segment type allows for a full meal per diem allowance on the last day of the Travel Plan, which makes continual expense reporting possible until you are ready to return home.

Creating a Group Travel Plan

A Group Travel Plan may be used if two or more individuals are traveling on the same itinerary for the same purpose.

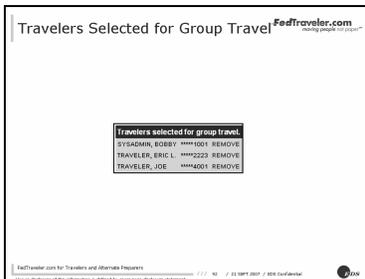
To create a Group Travel Plan, do the following:

1. On the **My Travel Desktop** page, select the **Group Travel** menu option.

*The **Traveler Profile List** page displays, showing the list of users in your Organization.*

2. From the list, select the Travelers one at a time.

*The Traveler's name is added to the **Travelers selected for group travel** box.*



Slide 94: Travelers Selected

Travelers selected for group travel.		
SYSADMIN, BOBBY	*****1001	REMOVE
TRAVELER, ERIC L.	*****2223	REMOVE
TRAVELER, JOE	*****4001	REMOVE

Note: You can use the Search function in the **Names** list if your Traveler's name is not displayed.

3. When finished naming Travelers for the group, select the **Create Plan** menu option.

*The **Travel Plan** page displays.*

4. Create and submit your Group Travel Plan.

See Lesson 4, *Creating Travel Plans*, for the complete procedures.

Creating a Sponsored Travel Plan

A Sponsored Travel Plan is created for a Traveler who may be assisting on a project or going on a special assignment which is being funded by another federal Agency or Organization, not the Traveler's.



Hint

As an Alternate Preparer, you initiate the Travel Plan using the **Alt. Preparer** menu option instead on the **My Travel Desktop** page. See Lesson 6, *Alternate Preparers*, for additional information.

To create a plan for Sponsored travel, do the following:

1. On the **My Travel Desktop** page, select the **Sponsored Travel** menu option.

*The **Travel Plan** page displays.*

2. Enter your travel segments and make your reservations.

See Lesson 4, *Creating Travel Plans*.

3. On the **Travel Plan** page, select the **Complete Plan** menu option.

*The **Financial Summary** page displays.*

4. Expand the Summary of Expense Categories box and click the binoculars icon next to the Expense Category the sponsoring Agency is funding.

*The **Sponsored Travel Expenses** page displays for the Expense Category you selected.*

Financial Summary

Lodging Expenses

Enter your changes, then choose an Action below:

Expense Item Description	Amount	Payment Type	Sponsored Amount
LODGING	\$176.00	Govt Issued Card	0.00

Sponsored Travel

Expense Category	Estimated Amount	Total Sponsored Amount
Lodging	\$176.00	0.00

Additional Comments

Sponsoring Organization Information

[^] Organization

[^] First Name

Middle Name

[^] Last Name

Suffix

[^] Title

[^] Position

[^] Address Lines

[^] City

[^] State OUTSIDE USA

[^] Zip

Country UNITED STATES OF AMERICA

[^] Phone Numbers

[^] E-Mail Address

All items with the [^] are required!

Choose an Action:

Save

Cancel

Sponsored Travel Page – Lodging Expenses

5. Enter the amount that the sponsoring Agency is funding for each expense item listed.
6. You may enter any helpful remarks in the **Additional Comments** box.



7. Complete the **Sponsoring Organization Information**. Required fields are indicated by an asterisk.
8. When finished, click the **Save** button at the bottom of the screen.
9. To exit, select the **Financial Summary** menu option.
*The **Financial Summary** page displays with the Sponsored Travel and Allocatable Total lines adjusted accordingly.*

Key Point

The amount in the first line in the **Enter Your Trip Allocations** table should be equal to the Allocatable Total amount.

10. If your Agency is responsible for any amount, reallocate expenses in the Trip Allocations table as necessary, then proceed with completing and submitting the Travel Plan.

See Lesson 4, *Creating Travel Plans*, for the procedures on Completing Your Travel Plan.

*The **My Travel Desktop** page displays, showing the Sponsored Travel Plan with a status of **Under Review**.*

Creating a Non-Fed Sponsored Travel Plan

A Non-Fed Sponsored Travel Plan is created for a Traveler whose trip is being funded by an organization outside the Federal Government. Sponsorship may be in kind, in reimbursement, or a combination of these.



Hint

As an Alternate Preparer, you can initiate the Travel Plan using the **Alt. Preparer** menu option on the **My Travel Desktop** page. (See Lesson 6, *Alternate Preparers*, for additional information.)

To create a plan for Non-Fed Sponsored travel, do the following:

1. On the **My Travel Desktop** page, select the **Non-Fed Sponsored** menu option.

*The **Travel Plan** page displays.*

2. Enter your travel segments and make your reservations.
 See Lesson 4, *Creating Travel Plans*, for detailed procedures.

3. On the **Travel Plan** page, select the **Complete Plan** menu option.

The **Financial Summary** page displays.

4. Expand the Summary of Expense Categories box and click the binoculars icon next to the Expense Category the sponsoring Agency is funding.

The **Non-Fed Sponsored Travel Expenses** page displays for the Expense Category you selected.

Financial Summary

Lodging Expenses

Enter your changes, then choose an Action below:

Expense Item Description	Amount	Payment Type	Reimburse Agency Amount	Payment In Kind Amount	Action
LODGING	\$176.00	Govt Issued Card	0.00	0.00	

Sponsored Travel

Sponsored Total Amounts Broken Out by Payment Type	
Total Reimbursable To Agency	Total Payment In Kind
0.00	0.00

Additional Comments

Sponsoring Organization Information

* Organization

* First Name

Middle Name

* Last Name

Suffix

* Title

* Position

* Address Lines

* City

* State OUTSIDE USA

* Zip

Country UNITED STATES OF AMERICA

* Phone Numbers

* E-Mail Address

All items with the * are required

Choose an Action:

Save
Cancel

Non-Fed Sponsored Travel Page – Lodging Expenses

5. Enter the amount that the sponsoring Agency is funding for each expense item listed.
6. Distribute the sponsored amount between the **Payment in Kind** and **Reimbursable to Agency** fields until the **Total left to break out** field shows a zero amount.
7. You may enter any helpful remarks in the **Additional Comments** box.
8. Complete the **Sponsoring Organization Information**. Required fields are indicated by an asterisk.
9. When finished, click the **Save** button at the bottom of the screen.
10. To exit, select the **Financial Summary** menu option.

*The **Financial Summary** page displays with the Non-Fed Spon Travel and Allocatable Total lines adjusted accordingly.*



Watch Out!

If you selected Payment in Kind and Reimbursable to Agency on a Non-Fed Sponsored Travel Plan, the Split to Card amount may be incorrectly allocated. If so, you will need to manually adjust the amount in the Split to Card field.



Key Point

The amount in the first line in the **Enter Your Trip Allocations** table should be equal to the Allocatable Total amount.

11. If your Agency is responsible for any amount, reallocate expenses in the Enter Your Trip Allocations table, as necessary, then proceed with completing and submitting the Travel Plan.

*The **My Travel Desktop** page displays, showing the Non-Fed Sponsored Travel Plan with a status of Under Review.*

See Lesson 4, *Creating Travel Plans*, for detailed procedures.



Creating a Not-to-Exceed (NTE) Travel Plan

A Not to Exceed (NTE) Travel Plan is created for trips that must adhere to the requirements of the Government Employees Training Act (GETA). In general, funds are limited for travel taken under the GETA. Funds for such travel are furnished by one Accounting String, and the Traveler pays for any expenses above the NTE amount.

Hint

As an Alternate Preparer, you can initiate the Travel Plan using the **Alt. Preparer** menu option on the **My Travel Desktop** page. (See Lesson 6, *Alternate Preparers*, for additional information.)

To create an NTE Travel Plan, do the following:

1. On the **My Travel Desktop** page, select the **NTE Travel** menu option.

*The **Travel Plan** page displays.*

2. Enter your travel segments and make your reservations.

See Lesson 4, *Creating Travel Plans*, for detailed procedures.

3. On the **Travel Plan** page, select the **Complete Plan** menu option.

*The **Financial Summary** page displays.*

4. Enter the maximum amount allowable for this trip in the **NTE Amount** field.

5. Click the **Calculate** button.

*The **Financial Summary** page refreshes and displays the Not to Exceed and Est. Out of Pocket (if any) amounts in the **Summary of Expense Categories** box.*

6. If the out-of-pocket amount can be charged to another Accounting String, reallocate the excess in the Enter Your Trip Allocations table.

See Lesson 4, *Creating Travel Plans*, for the procedures on Completing Your Travel Plan.

7. When you submit the Travel Plan, a message displays regarding the Government Employees Training Act. Click the **OK** button to complete the submission.

*The **My Travel Desktop** page displays, showing the NTE Travel Plan with a status of **Under Review**.*



Knowledge Check - Constructive Travel Plan

You live in Albany, NY, and have to travel to Buffalo, NY. Although you are authorized for a flight, you decide to drive (approx. 290 miles). Prepare a Constructive Travel Plan to Buffalo from 6/27/20yy – 7/2/20yy, to compare the cost of POV versus Contract Flight. Remember to create the POV plan *first*, then the Constructive Plan. Include the following Other Expenses in both plans:

- Conference fee - \$250
- Telephone calls - \$25
- Cash advance – 80%

As a fiscally responsible Traveler, you elect to use the less expensive method of transportation. Submit the completed Travel Plan for electronic approval.

Knowledge Check - Blanket Travel Plan

You and three other Travelers (of your choice) are assigned to a project that extends from January 1, 20yy, to June 30, 20yy. The Blanket Travel Plan is for two purposes: Training and Site Visits. Throughout this time period, you will only need to travel to the following locations: Chicago, IL; Denver, CO; and St Louis, MO. Calculate your meals and lodging per diem. There are no per trip limits on this exercise. Allocate the travel costs among multiple Accounting Strings.

Knowledge Check - Long Term TDY Travel Plan

Your supervisor requests you to travel to New Orleans, LA, on a client's emergency request for support. You will be leaving March 1, 20yy, and returning 180 days later.

1. Create a Long Term TDY plan; enter your beginning and ending dates. Calculate your estimated totals for your per diem allowance.
2. Set the per trip Limit amounts.
3. Limit travel to New Orleans, LA.
4. Limit Travel purposes to Emergency Travel and Site Visit.
5. After the TDY parameters have been filled, submit the document for approval.
6. After the document has been approved, create a Travel Plan from the Long Term TDY plan for three months (ending May 31, 20yy).
7. Create the segment, making sure to use End Voucher instead of Return Home on your last segment. This way you can submit interim Expense Reports while still away on travel.

Knowledge Check - Group Travel Plan

Create a Group Travel Plan for yourself and two other people who will travel with you by train and depart from Washington, DC (WAS), on 8/8/20yy, going to New York City (Manhattan - NYP), to attend training. You will all return home on August 12, 20yy. All Travelers will leave at the same time, on the same train, and stay at the same hotel. For this exercise, all travel will be charged to each Traveler's individual travel card. Enter the following other expenses for all Travelers:

- Taxi - \$50
- Hotel Tax - \$20

Submit the Travel Plan for approval. After approval, it is discovered that one Traveler has a conflicting trip. Cancel that Traveler's document. (You decide which Traveler.)

Knowledge Check - Sponsored Travel Plans

You are traveling from Washington, DC (DCA), to San Antonio, TX (SAT), for a week-long conference. Your total transportation cost (airfare) is being paid by another Government Agency. Create the Travel Plan for this scenario. Travel dates are from 7/10/20yy to 7/15/20yy.

Knowledge Check - Non-Fed Sponsored Travel Plan

A large corporation is sending you to Anchorage, AK, for two weeks to participate in a system test exercise. You leave on Monday, 7/18/20yy, and are responsible for only your meals. The corporation has already paid for your hotel accommodations and will reimburse your Agency the money for the purchase of the airline tickets.

Knowledge Check - NTE Travel Plan

Your Agency is sending you to San Diego on August 1, 20yy, for three days of training. The cost of the training is \$1,200.00 and includes the hotel accommodations for the entire trip. The airfare is \$345.00. The NTE amount is \$1,500.00. Create the Travel Plan that best fits this scenario.

Lesson 7 Summary

Having completed Lesson 7, you are now able to:

- Use Constructive Travel in conjunction with a POV Travel Plan
- Prepare a Blanket Travel Plan
- Create a Travel Plan based on a Blanket authorization
- Prepare a Long Term TDY Travel Plan
- Create a Travel Plan based on a Long Term TDY authorization
- Create and know when to use a Group Travel Plan, Sponsored Travel Plan, Non-Fed Sponsor Travel Plan, and Not to Exceed (NTE) Travel Plan

Lesson 7 Summary FedTraveler.com
moving people not papersm

You are now able to:

- Use Constructive Travel in conjunction with a POV Travel Plan
- Prepare a Blanket Travel Plan
- Create a Travel Plan based on a Blanket authorization
- Prepare a Long Term TDY Travel Plan
- Create a Travel Plan based on a Long Term TDY authorization
- Create and know when to use a Group Travel Plan, Sponsored Travel Plan, Non-Fed Sponsored Travel Plan, and Not to Exceed (NTE) Travel Plan

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Slide 95: Lesson 7 Summary

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Lesson 8: Creating Expense Reports

Introduction

This lesson provides an overview of the expense reporting process. It covers creating and submitting Expense Reports for domestic and international travel, managing credit card transactions, and submitting receipts. It also covers amending an Expense Report.

Lesson 8 Objectives

After completing this lesson, you will be able to:

- Complete and submit an Expense Report
- Submit and track receipts
- Manage credit card transactions
- Create and know when to use a Local Expense Report
- Create an Expense Report for an international trip
- Manage foreign currency transactions
- Adjust per diem allowances when crossing the IDL
- Amend and resubmit a completed Expense Report

Lesson 8 Objectives FedTraveler.com

After completing this lesson, you will be able to:

- Complete and submit an Expense Report
- Submit and track receipts
- Manage credit card transactions
- Create and when to use a Local Expense Report
- Create an Expense Report for an international trip
- Manage foreign currency transactions
- Adjust per diem allowances when crossing the IDL
- Amend and resubmit a completed Expense Report

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Use or disclosure of this information is defined by cover page disclosure statement.

Slide 96: Lesson 8 Objectives

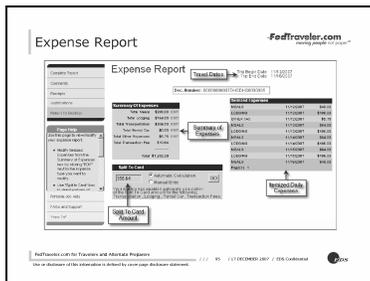
Initiating an Expense Report

When you return from your trip, you create and submit an Expense Report so that you can be reimbursed for out-of-pocket expenses and the credit card issuer can be paid for any charges made for your trip. When you are on an extended period of travel (Long-Term TDY), however, you may periodically report expenses. Initiating an Expense Report consists of reviewing and modifying your daily expenses during travel as necessary.

Expense reporting for local travel and for travel that lasts 12 hours or less is covered in a separate section in this lesson.

Expense Report Page

The **Expense Report** page is the first page that displays when you initiate an Expense Report. It shows an itemized list and a summary of your travel expenses. These are populated based on the expenses you estimate on your Travel Plan. Menu options help you navigate through the various Web pages to enter the data necessary for a complete expense report. The **Split To Card** box shows the total amount that was initially charged to the Traveler's Government credit card.



Slide 97: Expense Report

Complete Report

Comments

Receipts

Justifications

Return To Desktop

Page Help
Use this page to view/modify your expense report.

- Modify Itemized Expenses from the Summary of Expenses box by clicking "EDIT" next to the expense type you want to modify.
- Use "Split to Card" box to direct portions of

Printable Job Aids

FAQs and Support

"How To"

Expense Report

Trip Begin Date: 11/12/2007
Trip End Date: 11/16/2007

Doc. Number: 0000000007DHS DHG0000095

Summary Of Expenses		
Total Meals	\$288.00	EDIT
Total Lodging	\$744.00	EDIT
Total Transportation	\$204.00	EDIT
Total Rental Car	\$0.00	EDIT
Total Other Expenses	\$5.75	EDIT
Total Transaction Fee	\$10.64	
Total		\$1,262.39

Itemized Expenses		
MEALS	11/12/2007	\$48.00
LODGING	11/12/2007	\$186.00
OTHER TAX	11/12/2007	\$5.75
MEALS	11/13/2007	\$64.00
LODGING	11/13/2007	\$186.00
MEALS	11/14/2007	\$64.00
LODGING	11/14/2007	\$186.00
MEALS	11/15/2007	\$64.00
LODGING	11/15/2007	\$186.00
MEALS	11/16/2007	\$48.00

Split To Card

958.64 Automatic Calculation Manual Entry

Your Agency has enabled automatic calculation of the Split To Card amount for the following: Transportation, Lodging, Rental Car, Transaction Fees.

Expense Report Page

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Expense Report Menu	
Menu Option	Use this menu option to...
Complete Report	Open the Financial Summary page for the Expense Report where you can view and modify as necessary your travel expenses and the source of funding.
Comments	Enter comments that support your Expense Report, which can be viewed by your Approvers.
IDL	Open the International Date Line Adjustment page (available only when trans-Pacific travel is involved) where you can indicate on which days you gained or lost time as a result of crossing the International Date Line, impacting per diem calculation. (This is discussed in the lesson on Submitting Expenses for Foreign Travel.)
Receipts	Open the Receipts page where you can view expense items that require a receipt and enter justification for such items if you do not have a receipt to submit.
Justifications	Document the reasons for expense items that may not comply with the Federal Travel Regulation (FTR) or conform to Agency-specific rules.
Return to Desktop	Return to the My Travel Desktop page.

Slide 98: Expense Report Menu

The following table lists the menu options located on the **Expense Report** page:

Menu Option	Use this menu option to...
Complete Report	Open the Financial Summary page for the Expense Report where you can view and modify as necessary your travel expenses and the source of funding.
Comments	Enter comments that support your Expense Report, which can be viewed by your Approvers.
IDL	Open the International Date Line Adjustment page (available only when trans-Pacific travel is involved) where you can indicate on which days you gained or lost time as a result of crossing the International Date Line (IDL), impacting per diem calculation. (This topic is discussed in the Lesson on Submitting Expenses for Foreign Travel.)
Receipts	Open the Receipts page where you can view expense items that require a receipt and enter justification for such items if you do not have a receipt to submit.
Justifications	Document the reasons for expense items that may not comply with Federal Travel Regulation or conform to Agency-specific rules.
Return to Desktop	Return to the My Travel Desktop page.

To initiate an Expense Report, do the following:

1. On the **My Travel Desktop** page, select the Travel Plan for which you want to submit an Expense Report.
2. Select the **Expense Report** menu option to open the **Expense Report** page.

Modifying Expense Items in Your Expense Report

On the **Expense Report** page, you can modify the amounts of the main expense categories, which include:

- Meals
- Lodging
- Transportation
- Rental car
- Other expenses

You must manually increment the **Split to Card** amount if you determine that it does not reflect other expenses that were also charged to your Government credit card, other than lodging and transportation. This amount is paid directly to the financial institution that issued your credit card.

To manually increment the Split to Card amount, do the following:

1. In the Split to Card field, select the **Manual Entry** radio button and click the **GO** button.

A dialog box displays the following message: "You have selected Manual Entry for the Split to Card field. Be sure to adjust the Split to Card amount if changes are made to your expense items."

2. Click the **OK** button.

*The **Split to Card** field becomes editable and you can now manually increment the Split to Card amount.*

See section on *Managing Credit Card Transactions* for additional procedures.

To modify expense items in your Expense Report, do the following:

1. On the **Expense Report** page, click the **Edit** link for the amount you want to modify.
2. To adjust the Total Meals:
 - Click the **Edit** link for Total Meals. On the **Daily Meals** page, click the **binoculars** icon next to the day for which you want to edit meal costs. On the **M&IE Breakdown** page, select the checkbox for the meal you want to exclude from the per diem allowance.
 - To exit the **M&IE Breakdown** page, select the **Daily Meals** menu option. To exit the **Daily Meals** page, select the **Return to Report** menu option.



Watch Out!

If you select the Segment Type **Shared Lodging**, then attempt to edit the **Daily Meals** using the **Edit** link on the Expense Report, the system will include selected meals that should be excluded when you return to the **Expense Report** page.

This error requires a data fix. Please call the FedTraveler.com Call Center using the number for your Agency listed on the **Contact Us** page. The data fix can take up to 48 hours to complete.

3. To adjust the Total Lodging:
 - Click the **Edit** link for Total Lodging. On the **Daily Lodging** page, correct the amount next to the day or days for which you want to edit the lodging cost.
 - You may change lodging costs for a range of days by selecting the check boxes next to the days you wish to change, and then entering the amended rate in the box headed **Change Checked Dates to This Value**. Click the **Go** button to apply your change to the selected date range.
4. To exit, select the **Return to Report** menu option.

Hint

If you input a lodging amount other than zero in the last non-excluded day, FedTraveler.com will require a justification.



5. To adjust the Total Transportation:
 - Click the **Edit** link for Total Transportation. On the **Reservations** page, correct the fare amount (air or rail only) in the appropriate **Segment** box.
 - To exit, select the **Return to Report** menu option.
6. To adjust the total Rental Car cost:
 - Click the **Edit** link for Total Rental Car. On the **Reservations** page, correct the rental car amount in the appropriate **Segment** box.
 - To exit, select the **Return to Report** menu option.
7. To modify Other Expenses:
 - Click the **Edit** link for Total Other Expenses. On the **Other Expenses** page, you can do one or all of three things:
 - Add another miscellaneous expense
 - Modify an existing expense
 - Delete an existing expense
 - To exit, select the **Return to Report** menu option.

See *Entering Other Expenses* in Lesson 4 for complete procedures.



Watch Out!

FedTraveler.com rejects Other Expense amounts less than \$1.00. For example, if you enter .95, the system removes the decimal point and accepts the entry as "\$95.00". In order to enter an amount less than \$1.00, you must enter a zero followed by the decimal point and the amount for the expense item (e.g., 0.95).



Watch Out!

Some Agencies have established a rule requiring justification for Miscellaneous Expenses. If a Traveler in one of these Agencies enters a Miscellaneous Expense on the Travel Plan, the Traveler is also required to enter a **Justification**. However, if the Traveler enters the Miscellaneous Expense on the Expense Report and didn't have this expense entered on the Travel Plan, the system is not requiring the user to enter a **Justification** on the Expense Report.

Amend the Travel Plan to enter the Miscellaneous Expense and the **Justification**, or enter the justification in the **Comments** field of the Expense Report if permitted by the Agency's policy.

8. In the **Summary of Expense Categories** box on the **Expense Report** page, view your revised totals.
9. You should adjust the amount in the **Split to Card** field if you determine that it does not reflect additional expenses charged to your Government credit card.

When overages from advance requests are identified because of a trip cancellation or change in the total trip amount, FedTraveler.com sends an e-mail notification to the Traveler and the Agency. In the Expense Report, if the total advances are equal to or greater than the total expenses, the **Split To Card** option will not be available.

Processing Receipts

Any expense that requires a receipt is listed on the **Receipts** page. If you do not have a receipt to cover an expense, you are required to provide a written explanation.

To process receipts, do the following:

1. On the **Expense Report** page, select the **Receipts** menu option.

*The **Receipts** page displays.*

2. Select the **Yes** checkbox next to the expense item to indicate that you have a receipt for that item. If not, explain why in the **Justification** textbox next to the item.
3. Repeat for all listed expense items.

4. To send receipts to FedTraveler.com, select the **Fax Receipts** menu option.

*A **Fax Cover Sheet** displays in a new Web browser window.*

[Print Form](#)

FedTraveler.com Fax Cover Sheet

To: FedTraveler.com

From: LIEBE, LAURA

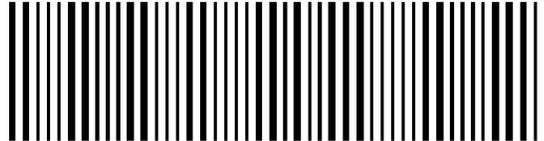
Fax Number:

Total no. of pages including cover: _____

Domestic : 1-866-350-5995
International: 1-949-221-7888

RE: Receipts

Date: _____



00072307

FedTraveler.com Document #: ETRAVEL ZETRAVEL01 //000039500000
Final Destination: LOCAL EXPENSE,
Begin Date: 08/17/2007



Instructions:

- Make sure the barcodes and all information are clearly visible before faxing. Do not include receipts on this cover sheet.
- Fax this original cover sheet as the first page with all receipt pages following.
- Make sure a new cover sheet is printed for each new FedTraveler.com document.

Fax Cover Sheet

5. Print the transmittal sheet, fill in the date and total number of pages, and use it as a cover page for your fax.

Use the **original** transmittal sheet when you send your fax. Do not photocopy the transmittal sheet. Using a photocopy degrades the quality of the bar code, causing a scanning error.

6. Tape your receipts to a sheet of plain bond paper. Use as many sheets as necessary.

Ignore any instructions to attach receipts to the Facsimile Transmittal Sheet.

7. Fax the original of the transmittal sheet and the sheets with your receipts attached to FedTraveler.com.

You may fax photocopies of the receipt sheets only. Make sure all the sheets are right side up when you fax them.



Key Point

Use the following Fax numbers:

- 1-866-350-5995 (from CONUS locations)
- 01-949-221-7888 (from OCONUS locations)

8. When you are finished with all receipts, select the **Return to Report** menu option.



Hint

To verify if a receipt is in the FedTraveler.com system, select the **View Receipts** menu option on the **Receipts** page.

Completing Your Expense Report

Before you submit your Expense Report, you should provide justification text where required. You can also enter any additional comments for the Approvers and change expense allocations as necessary.

To complete your Expense Report, do the following:

1. On the **Expense Report** page, select the **Justifications** menu option.
*The **Justifications** page displays.*
2. Enter any required justifications. When finished, select the **Return to Report** menu option.
3. On the **Expense Report** page, select the **Comments** menu option.
*The **Comments** page displays.*
4. Enter any comments you want to add to your Expense Report that the Approvers may find helpful. When finished, select the **Return to Report** menu option.
5. On the **Expense Report** page, select the **Complete Report** menu option.

The **Financial Summary** page displays.

6. Change the expense allocations as necessary.

See *Reallocating Travel Expenses* in Lesson 4 for complete procedures.



Key Point

In Sponsored Travel Expense Reports, you will need to adjust the Sponsored Travel amount if you did not do this when you created the Sponsored Travel Plan. Click the **binoculars** icon next to the amount to open the **Sponsored Travel** page, where you can make appropriate changes.

For Expense Reports based on a Blanket authorization, there is a checkbox in the Expense Allocations table for indicating if the Expense Report represents the final claim under the original Blanket.

7. To submit your Expense Report for approval through a different Approval Chain, select the **Change Routing** menu option. Otherwise, skip to step 11.
8. On the **Change Approval Chain** page, select an option from the dropdown list.
9. Select the **Return to Fin. Summ.** menu option.
A message pops up asking you to confirm your action.
10. In the message box, click the **OK** button.

The **Financial Summary** page displays.



Hint

If you do not have complete information to get your Expense Report approved, you can put the document on hold at this point. Select the **Hold Document** menu option. Your Expense Report displays on the **My Travel Desktop** page with a status of **On Hold**.

11. Select the **Submit Document** menu option.
You are prompted to certify your Expense Report.
12. In the certification message box, click the **OK** button.

The **My Travel Desktop** page displays, showing the Expense Report with a status of **Under Review**.



Watch Out!

If a System Administrator deletes one of the Job Titles in your Approval Chain while your Expense Report is under review, your document will not be assigned to an Approver when it reaches the level for the deleted Job Title. If this happens, place the document on hold using the Document Control options, and then resubmit it.



Watch Out!

If FedTraveler.com receives an itinerary synchronization from the Online Booking Engine (OBE) after your trip date has passed, and while your Expense Report is still under review, a negative dollar amount will appear in line one on the Financial Summary page. FedTraveler.com inadvertently removes the Transportation Cost from the Expense Report.

If this occurs, please contact the FedTraveler.com Call Center for a data adjustment.

Local Expense Reports

When an official trip lasts less than 12 hours (with no per diem allowance) or within the Agency-specified radius of your official duty station, submit your expenses for reimbursement on a Local Expense Report. Unlike a regular Expense Report, a Local Expense Report is not associated with a Travel Plan.

Local Expense Reports may also be used to claim reimbursement for the purchase of office supplies.



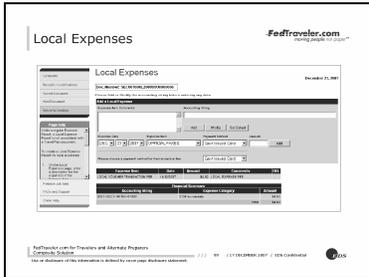
Hint:

An Alternate Preparer should initiate a Local Expense Report using the **Alternate Preparer** menu option on the **My Travel Desktop** page. After you select the **Local Expense Report** option and the Traveler for whom the document is being prepared, a blank **Local Expense Report** page displays, showing the Traveler's name.

To create a Local Expense Report, do the following:

1. On the **My Travel Desktop** page, select the **Local Expense** menu option.

The **Local Expenses** page displays.



Slide 99: Local Expenses Page

Local Expenses
December 23, 2007

Doc. Number: SECUG1000L2008UUU0000006

Please Add or Modify the accounting string before entering any data

Add a Local Expense

Expense Item Comments

Expense Date: DEC 23 2007

Expense Item: OFFICIAL FAXES

Payment Method: Govt Issued Card

Amount:

Please choose a payment method for the transaction fee: Govt Issued Card

Accounting String

Add Modify Set Default

Expense Item	Date	Amount	Comments	DEL
LOCAL VOUCHER TRANSACTION FEE	11/19/2007	\$4.82	LOCAL EXPENSE FEE	

Financial Summary		
Accounting String	Expense Category	Amount
2007~SECX~X0100~E1000	2134 Incidentals	\$4.82
Total		\$4.82

Local Expenses Page

2. In the **Expense Date** fields, enter the date of the expense using the dropdown buttons.
3. From the **Expense Item** dropdown list, select an item.
4. In the **Expense Item Comments** text box, enter a brief description of the expense item.
5. Click the **Add** or **Modify** button to select or modify the Accounting String to which the expense is being charged.

The **Accounting String Setup** page displays.

6. Use the **Select Value** buttons on the **Accounting String Setup** page to populate the required fields.
7. In the **Amount** field, enter the expense amount.
8. Click the **Add** button.

*The expense is added to the Expense Item table and the financial details display in the Financial Summary table. If you added an incorrect item, click the **DEL** link next to the item to remove it from the list.*

9. Repeat steps 2 to 8 to add additional expense items.
10. When finished, select the **Receipts/Justifications** menu option.

*The **Local Expense Receipts** page displays. Follow the procedures for Processing Receipts discussed earlier*

11. On the **Local Expense Report** page, select the **Comments** menu option if you want to add remarks for your Approvers.
12. To submit your Local Expense Report for approval through a different Approval Chain, select the **Change Routing** menu option. Otherwise, skip to step 16.
13. On the **Change Approval Chain** page, select an option from the dropdown list.
14. Select the **Return to Loc. Exp.** menu option.

A message prompts you to confirm your action.

15. In the message box, click the **OK** button.

*The **Financial Summary** page displays.*



Hint

If you do not have complete information to get your Local Expense Report approved, you can put the document on hold at this point. Select the **Hold Document** menu option. Your Local Expense Report displays on the **My Travel Desktop** page with a status of **On Hold**.

16. Select the **Submit Document** menu option.

*The **My Travel Desktop** page displays, showing the Local Expense Report with a status of **Under Review**.*

Managing Credit Card Transactions

FedTraveler.com automatically tracks your credit card usage during your trip. When you use your Government-issued credit card to pay for travel expenses, the transactions are entered into the system. You may then associate an expense type with each credit card transaction that you want to claim on the **Other Expenses** page of your Expense Report.

To claim expenses from credit card transactions, do the following:

1. On the **Expense Report** page, click the **Edit** link next to **Total Other Expenses**.

*The **Other Expenses** page displays.*

2. Click the **Credit Card** icon.

*The **Credit Card Transactions** box displays with the list of charges on your Government credit card.*



Hint

To filter the Transactions list by merchant, enter the Merchant name in the **Navigation** box and then click the **Search Merchant** button. To filter by transaction date, select the date using the dropdown buttons and then click the **Search by Date** button.

3. Click the **Select** link next to the transaction you want to claim.

*You are returned to the top of the **Other Expenses** page with the transaction amount displayed in both the **Trip Expenses Amount** field and the **Split to Card** field.*

4. In the **Trip Expenses** box, select an Expense type from the dropdown list.
5. Modify the expense date as necessary, using the dropdown buttons.
6. Click the **Add** button.

*The item is added to the **Expense Item** table on the right.*

7. Repeat steps 2 to 6 for each credit card transaction you want to claim.
8. When finished, select the **Return to Report** menu option.

To exclude credit card transactions, do the following:

9. On the **Other Expenses** page, click the **Credit Card** icon.

*The **Credit Card Transactions** box displays with the list of charges on your Government credit card.*



Hint

To filter the Transactions list by merchant, enter the Merchant name in the **Navigation** box and then click the **Search Merchant** button. To filter by transaction date, select the date using the dropdown buttons and then click the **Search by Date** button.

10. Click the **Remove** link next to the transaction you want to exclude.

*The **Credit Card Summary** page displays, showing the transaction that was removed from the **Transactions** list.*



Hint

Use the fields in the **Navigation** box to filter, re-sort, or change the number of items displayed in the list.

11. To cancel your action, select the checkbox for the transaction and then select the **Return to Other** menu option.

*The **Other Expenses** page displays.*

Submitting Expenses for Foreign Travel

When you create an Expense Report for Foreign travel, you must be aware of the currency exchange rate between the U.S. dollar and the currency of the country you are visiting.

You should also adjust your per diem allowances by identifying days that you gain or lose if travel involves crossing the IDL.

To submit expenses for foreign travel, do the following:

1. On the **My Travel Desktop** page, click the radio button for the approved Travel Plan.
2. Select the **Build Expense Report** menu option.

*The **Expense Report** page displays with the **IDL** menu option available.*

3. In the **Summary of Expense Categories** box, click the **Edit** link for the expense type.

*The appropriate **FedTraveler.com** Web page displays.*

On Expense pages where an **Exchange Rate** box is available, enter the foreign currency equivalent of US\$1.00 before you enter the amounts in the foreign currency. The foreign currency amount is automatically converted to US dollars using the Exchange Rate you entered.

4. When finished modifying your expense details, select the **IDL** menu option.

*The **International Date Line Adjustment** page displays.*

5. The IDL menu function displays each day of the trip with check boxes. Indicate which days were normal, lost, or gained when you crossed the IDL.

6. Select the **Return to Report** menu option.

*A message displays on the **Expense Report** page regarding the adjusted days and the effect on the per diem allowances.*

7. Complete and submit the Expense Report.

Refer to the previous sections in this Lesson for complete procedures.

Amending Expense Reports

You may need to amend an Expense Report after it has been approved and completed. For example, you may have misread a receipt and originally reported a larger amount than what was actually paid. In this case, you need to submit a Debit document, which means that you owe the Government. On the other hand, if you reported a lesser amount than what was actually paid, you need to submit a Credit document, which means that the Government owes more to the Traveler or credit card issuer.

Hint

Have a calculator and a printout of your original Expense Report handy for easy reference. In the example given above, in the Amended Report, you are entering the difference between the expense amount you originally reported and the actual amount.

You must provide a reason for amending an Expense Report on the **Comments** page.



To amend an Expense Report, do the following:

1. On the **My Travel Desktop** page, click the radio button for the completed Expense Report that you need to amend. Then click the **Amend Document** button.

*The **Expense Report** page displays with all expenses showing a zero amount.*

2. In the **Summary of Expense Categories** box, click the **Edit** link for the expense type you want to modify.

*The appropriate **FedTraveler.com** Web page displays where you can modify the expense details.*

3. When finished, select the **Return to Report** menu option.

*The **Expense Report** page displays, with the modified items shown in the **Itemized Expenses** list on the right side.*

4. Select the **Comments** menu option.

*The **Comments** page displays.*

5. State the reason for the amendment. To exit, select the **Return to Report** menu option.

6. Complete your report; submit by selecting the **Credit Document** or **Debit Document** menu option on the **Financial Summary** page, according to the sum total of modifications to the expenses.



Watch Out!

Currently, when an amended Expense Report is created and transaction fees are populated in the **Split to Card** field, the **Debit Document** menu option is missing on the **Financial Summary** page. If the transaction fee is removed from the **Split to Card** field, the **Debit Document** menu option displays.

The Traveler or Alternate Preparer should change the **Split to Card** amount to **\$0.00** so the **Debit Document** menu option displays.



Key Point

On the **My Travel Desktop** page, your original Expense Report remains with a status of **Complete**. A new document is added to the list as an Amended Report (under Type) and has a status of **Under Review**.

Amending a Travel Plan after Starting an Expense Report

Occasionally you may have to return to and amend a Travel Plan after you have already begun your Expense Report. For example, you may see from your expense totals that you did not have sufficient funds approved and allocated for the trip. In this case, you would want to amend and resubmit your Travel Plan to get the necessary approvals.

The problem is that your Travel Plan is removed from the document list on the **My Travel Desktop** page when you begin your expense report.

To return to your Travel Plan, do the following:

1. Print and save all the pages in your Expense Report that you have completed.
2. Return to the **My Travel Desktop** page.
3. Click the radio button in front of your Expense Report in the document list.
4. Click the **Document Control Options** button.
5. On the **Document Control** page, click the **Delete** button.

*The **Expense** report is deleted, and the **Travel Plan** displays in the document list.*

6. Open, amend and submit your Travel Plan. (See *Amending Travel Plans* in Lesson 4.)
7. When the amended Travel Plan has been approved, begin a new Expense report. Use the pages you printed as a guide.



Knowledge Check - Expense Reports

Scenario 1: Basic Expense Report 1

Create an Expense Report for the approved Travel Plan from Scenario 1 in *Practical Exercises: Travel Plans*.

1. Select the Travel Plan and then click the **Expense Report** menu option.
 - a. Transportation
 - b. Rental Car: Add \$36.98 for taxes and fees.
2. Other Expenses:
 - a. Change the Airport Parking entry to \$36.
 - b. Remove the Tolls entry.
3. Submit the Expense Report
 - a. Click the **Complete Report** menu option
 - b. Review the Accounting String entries.

Knowledge Check - Local Expense Reports

You have to go to Baltimore to do a site visit. Since you will not be gone for more than 12 hours, you are not entitled to any per diem allowances and will not be creating a Travel Plan. Submit a Local Expense Report instead to report the expenses incurred during this trip. Use the list below as a guide.

Expenses:

- Mileage: 30 miles one way
- Tolls: \$5.00

Add one more appropriate expense that you may incur.

Final Exercise - Travelers and Alternate Preparers Course

You were told at the last minute that you needed to be in Seattle, WA, for two days for an emergency information meeting on Monday of last week. This stay was immediately followed by a three-day site visit to your offices in London, UK. You booked travel directly with your TMC and did not have time to create a Travel Plan. While you are in London, you learned that you need to proceed immediately to Baltimore upon your return to give a presentation to another Agency about your trip. You have to drive there directly from the airport and stay overnight. The other Agency is paying for your Baltimore hotel and meals only. You also find out that your assistant will be joining you in Baltimore to help with the presentation.

While in London, you start your Expense Report.

How do you proceed? Explain in the space below, then complete and submit the necessary Travel Documents.

Appendix A – Terms and Acronyms

Term	Definition
_CA	Fare basis code that designates a limited capacity coach class Airline City Pair fare.
24/7/365	24 hours a day, 7 days a week, 365 days a year
Actual Expenses	Payment of authorized actual expenses incurred, up to the limit prescribed by the Administrator of GSA or the Agency, as appropriate. Entitlement to reimbursement is contingent upon entitlement to per diem, and is subject to the same definitions and rules governing per diem.
Actual Necessary	Segment type used where the cost of lodging is expected to exceed the normal per diem for a city up to either 150% or 300%.
Advance	Payment of estimated travel expenses to employees in advance of anticipated travel.
Agency	A Federal Government entity – Under the FTR, Agency means: (1) An executive Agency as defined in Title 5 U.S.C. 105 (an executive department, an independent establishment, the General Accounting Office, or a wholly-owned Government corporation as defined in section 101 of the Government Corporation Control Act, as amended (31 U.S.C. 9101), but excluding a Government controlled corporation).
Alternate Preparer	A person authorized to make Travel Plans using FedTraveler.com on behalf of another individual.
American Flag Carrier	An airline owned by a U.S. firm, but includes a foreign flag carrier with a code share agreement (e.g., an American Flag carrier using foreign flag carrier equipment).
AO	Authorizing/Approving Official
Approval Chain	A routing chain that is created in FedTraveler.com to designate the document flows through the approval process.
Approval Trigger	A travel expense, such as car rental or foreign travel that requires additional review for approval. When an Approval Trigger displays in a Travel Plan or Expense Report, a Dynamic Approver is added to the Approval Chain.

Term	Definition
Approver	An official who reviews and approves Travel Documents (authorizations/Travel Plans, vouchers/Expense Reports, and local vouchers) submitted by Travelers and ensures that the arrangements and cost estimates are reasonable and consistent with mission requirements.
Authorizing/Approving Official	Chapter 301-71.104 of the FTR defines the Approving Official as "Your Agency head or an official to whom such authority has been delegated. This authority may be delegated to any person(s) who is aware of how the authorized Travel will support the Agency's mission, who is knowledgeable of the employee's Travel Plans and/or responsible for the Travel funds paying for the Travel involved." Appendix O of the JFTR and JTR defines the Authorizing or Approving Official (AO) as "The individual who controls the mission, authorizes the trip, and controls funds for TDY travel."
Blanket Travel	Travel authorization that covers an extended period of time. Blanket Travel may be limited to specified date ranges, selected geographical locations, maximum per trip costs, and/or number of days associated per trip.
Business Class	Travel in premium-class accommodations on commercial transportation; a higher-level of service than Coach Class.
Call Center	EDS FedTraveler.com customer support desk.
CBA	Centrally Billed Account
CBT	Computer-Based Training
Centrally Billed Account	Agency Travel Card used for payment of travel expenses for which the Agency is responsible for payment of charges incurred.
Coach Class	Travel in the basic class of accommodations provided by commercial transportation providers.
Conference Travel	Official travel to attend a conference – The FTR defines conference as a meeting, retreat, seminar, symposium, or event that involves attendee travel. The term "conference" also applies to training activities that are considered to be conferences under 5 CFR 410.404.

Term	Definition
Constructive Travel	Method to compare different travel modes (e.g., POV vs. Contract Flight) to determine which travel mode would be most cost-effective/advantageous to the Government.
Contract Carriers	U.S. certificated air carriers that are under contract with the Government to furnish Federal employees and other persons authorized to travel at Government expense with passenger transportation service. This also includes GSA's scheduled airline passenger service between selected U.S. cities/airports and between selected U.S. and international cities/airports at reduced fares.
Contract City Pair Fare	Cost of airfare between two cities that have been negotiated and set by the airlines under the GSA City Pair Program.
Contract Flight	A commercial flight that offers a Contract City Pair Fare
CONUS	Continental United States, the 48 contiguous states and the District of Columbia
Courtesy Shuttle	Courtesy transportation furnished by hotels/motels between a place of lodging at the TDY station and the carrier terminal or points of interests within a geographical area, as determined or offered by the hotel/motel.
CRS	Commercial Reservation System / Computerized Reservation Service
Current Approver	The Approvers Desktop on which the Travel Document is currently awaiting approval. This can be viewed from the Document Control page.
Default	A selection predetermined by the service or your organizational officials.
Default Expenses	Travel expenses that are coded into the system. Examples of Default Expenses include Airfare, Lodging, and Rental Car
Desktop	The central tracking point within FedTraveler.com where all documents are stored.
Document History	Allows you to view all actions taken for a particular document. It is available by selecting the radio button next to the document you intend to view then selecting the Document Control menu option.

Term	Definition
Document Number	The identifier the system administrator creates to associate documents with trips.
Dynamic Approver	An approver who must review any travel expenses designated as Approval Triggers, such as car rental and foreign travel. If an Approval Trigger displays in a Travel Plan or Expense Report, a Dynamic Approver will be added to the document's Approval Chain.
EDS	Electronic Data Systems Corporation
EFT	Electronic Funds Transfer – The transfer of funds between computer systems.
eFulfillment	Electronic Fulfillment – The automated completion of travel reservations and ticket purchases.
E-Gov	Electronic Government
Emergency Travel	Defined in FedTraveler.com as same-day travel; weekend/after hours reservations; mission-critical travel in response to a natural disaster, national defense, or the operation of public facilities; and illness or injury during TDY.
ETS	E-Gov Travel Service – A Government-wide, Web-based travel management tool that streamlines and consolidates federal travel operations.
Expense Category	Category to which Other, Local, or Default Expenses can be associated. Examples include Transportation, Lodging, and Official Expenses.
Expense Report	Synonymous with Travel Voucher, Travel Claim, or Voucher. A written request, supported by documentation and receipts where applicable, for reimbursement of expenses incurred in the performance of official travel.
Expense Report Path	The route or chain, Expense Reports (including Local Expense Reports) follow for approval. This chain may be the same as the Travel Plan path or it may be different.
FC	Foreign Country. Any travel destination outside the fifty United States and Puerto Rico.

Term	Definition
Federal Travel Regulation	Travel regulations (41 CFR §§ 300-304) that govern official travel by federal civilian employees and others authorized to travel at Government expense.
FedRooms	Formerly the Federal Premier Lodging Program (FPLP). Commercial lodging facilities contracted by GSA under the Federal Premier Lodging Program (FPLP) (a list of FPLP facilities may be found on the Internet at http://www.gsa.gov), all of which meet fire safety requirements, unless certain conditions exist. See FTR for specific details.
FFP	Frequent Flyer Program—Loyalty award program earned from commercial airline carriers.
FFS	Federal Financial System
First Class	Travel in premium-class accommodations on commercial transportation; a higher level of service than Business Class.
Foreign Flag Carrier	Commercial carrier that is owned by a non-U.S. company, e.g., Alitalia (Italian); All Nippon Airways (Japanese); Lufthansa (German).
FPLP	Federal Premier Lodging Program – See FedRooms above
Frequent Flyer Program	Loyalty award program earned from commercial airline carriers.
FTR	Federal Travel Regulation
Fund Certifier	Individuals responsible for particular Accounting Strings.
FY	Fiscal year
GDS	Global Distribution System – A central database maintaining the inventory (including transportation and lodging) that is available for making reservations.

Term	Definition
Group Profile	Created by the Global System Administrator. This profile groups Organizations within a Department or Agency to ensure security or to provide Alternate Preparers access to the User Profiles of Travelers for whom they handle Travel Plans. These Security Groups reflect the administrative responsibilities of Pseudo System Administrators who manage more than one Organization for a Department or Agency. An Alternate Preparer may have access to a Security Group that includes Travelers within and outside of the preparer’s Organization.
Group Travel	Two or more Travelers, originating from the same place, going to the same destination for the same purpose.
GSA	General Services Administration
GTR	Government Transportation Requests
Help Desk	Agency support desk
GVTS	Government Transportation System
HTTP	Hypertext Transfer Protocol – A protocol used for browsing Website pages on the Internet.
HTTPS	Hypertext Transfer Protocol over a Secure Socket Layer – A sub layer protocol of HTTP, which encrypts and decrypts user’s page requests and pages returned by the Web Server.
IBA	Individually Billed Account – A Travel card assigned to an individual Government employee, to be used for payment of travel expenses for official business, for which the cardholder is responsible for payment of charges incurred.
IDL	International Date Line – The imaginary line in the Pacific Ocean that runs from the North to the South poles where each new day starts.
Invitational Traveler	Individual traveling on behalf of the specified Agency, who is not an employee of the specified Agency.
JFTR	Joint Federal Travel Regulations
Job Title/Workgroup	A group of Approvers with the same level of authority. Each Job Title/Workgroup can have up to 10 Approvers within an Organization.

Term	Definition
Joint Federal Travel Regulations (Volume 1 – Military Members)	The regulations pertaining to per diem, travel and transportation allowances, relocation allowances, and certain other allowances of Uniformed Service members (including regular and reserve components).
Joint Travel Regulations (Volume 2 – DoD Civilians)	The regulations pertaining to per diem, travel and transportation allowances, relocation allowances, and certain other allowances of all Department of Defense civilian personnel.
JTR	Joint Travel Regulations
Justification	An explanation the Traveler is required to provide when Organization policies are not followed, or a selection other than the Organization’s defaults is chosen.
Local Expense Report	Synonymous with Local Voucher – Used for travel within an Agency-specified radius of the official duty station, less than 12 hours in duration.
Lodging Plus Per Diem System	The method of computing per diem allowances for official travel in which the per diem allowance for each travel day is established on the basis of the actual amount the Traveler pays for lodging, plus an allowance for meals and incidental expenses (M&IE), where the total does not exceed the applicable maximum per diem rate for the location concerned.
M&IE	Meals and Incidental Expenses – Expenses for breakfast, lunch, dinner and related tips and taxes (specifically excluded are alcoholic beverage and entertainment expenses, and any expenses incurred for other persons).
Non-Fed Sponsored Travel	Travel by a Government employee where the travel expenses are being funded by a non-Federal Agency/Organization.
Non-Self Service	Travel reservations, usually for foreign travel, group travel, or multi-city travel, made directly with the Travel Management Center (TMC), not through the Online Booking Engine (OBE) in FedTraveler.com.
Not To Exceed (NTE)	Limits or parameters defined for travel. Example: Daily travel expenses for training will not exceed \$500.00.
OBE	Online Booking Engine: a component used by FedTraveler.com to reserve and book transportation, hotel, and/or rental car request.

Term	Definition
Object Class	Travel expenses divided into smaller categories within an Accounting String. Only Global Administrators can create and delete Object Classes.
OCONUS	Outside the Continental United States
Offline Reservations	Travel reservations, usually for foreign travel, group travel, or multi-city travel, made directly with the Travel Management Center (TMC) and not made through the Online Booking Engine (OBE) in FedTraveler.com.
Online Reservations	Service in which the customers or users make their own travel arrangements using an Online Booking Engine.
Organization Profile	Contains information about processes for a group of User Profiles . An Organization in FedTraveler.com gives Local System Administrators the ability to match the logical structure of the FedTraveler.com database with the physical structure of their organizations. The information includes the System Administrator, the processing rules, and the processing options. Examples of processing options are PIN Expiration and per diem rates that display in documents for Travelers within an Organization.
Other Expenses	Incidental travel costs that can be approved. Examples are bus and taxi fares in cities outside the Traveler’s home base.
PCS	Permanent Change of Station
PDA	Personal Digital Assistant
PNR	Passenger Name Record – The computerized travel record stored in the CRS.
POC	Point Of Contact
POV	Privately Owned Vehicle
Proportional Meal Rate	The average of the locality meal rate, portion of the M & IE amount and the cost for three meals in a Government dining facility (mess).
Purpose Code	Predefined code selected from a dropdown list to describe the purpose for travel.

Term	Definition
Receipt	A document that serves as evidence of expenditure – The Federal Travel Regulations (Ch 301-11.25) requires that the Traveler retain all lodging receipts and receipts for authorized expenses over \$75.
Receipts Imaging	Method by which a Traveler can fax receipts to FedTraveler.com – The system will attach an electronic copy of the receipts to the Expense Report. The Traveler must print the fax cover sheet that is available during the creation of the Expense Report.
Reimbursable Expense	Necessary and reasonable travel/transportation-related expenses incurred while on approved official travel.
Release Notice	Formal communication to the user community that software and/or hardware is being deployed into the FedTraveler.com production environment.
Run-of-the-house (ROH)	Hotel room type where reservation is guaranteed but the actual room is assigned based on current availability at time of guest check-in
SATO	Scheduled Airlines Ticket Office
SDDC	Surface Deployment and Distribution Command. A DOD entity that is responsible for the negotiated rental car agreement program that is used by federal travelers. The SDDC negotiated car rates include automatic unlimited mileage, collision damage insurance, and fixed ceiling prices.
Segment	In FedTraveler.com, a portion of a trip defined by a city and an airport
Self Service	Service in which the customers or users make their own travel arrangements using an Online Booking Engine.
Split Pay	A payment option, which allows direct payment of the expenses, charged to the Government Travel Card accounts at the time of travel reimbursement. The payment information is provided to the Agency's financial system through an interface and payment is made by the Agency's financial system.
Sponsored Travel	Travel by a Federal employee that is funded by another Federal Organization, within the employee's Agency or another Agency.

Term	Definition
SSN	Social Security Number
TCS	Temporary Change of Station
TDY	Temporary Duty Travel, travel by Federal civilian employees and others authorized to travel at Government expense.
Ticket Delivery	Method by which the TMC gets the commercial airline ticket to the traveler (e.g., electronic ticketing (primary method) or paper ticket (delivery via U.S. Mail, Express, or Courier)).
Ticketing Time Limit	A deadline imposed by an airline for the actual issuance of a ticketed.
TMC	Travel Management Center – Provides ticket issuance and reservation fulfillment services
Toolbox	A menu option and a Web page in FedTraveler.com where System Administrators use to manage Objects.
Travel Plan	Synonymous with Travel Authorization or Travel Order – This document identifies the key travel information for a specific trip to include relevant destinations, travel dates, transportation arrangements, and costs, lodging and per diem entitlements.
Travel Authorization	Synonymous with Travel Plan or Travel Order – This document identifies the key travel information for a specific trip to include relevant destinations, travel dates, transportation arrangements, and costs, lodging, and per diem entitlements.
Travel Claim	Synonymous with Expense Report, Travel Voucher, or Voucher. A written request, supported by documentation and receipts where applicable, for reimbursement of expenses incurred in the performance of official travel.
Travel Order	Synonymous with Travel Plan or Travel Authorization – This document identifies the key travel information for a specific trip to include relevant destinations, travel dates, transportation arrangements, and costs, lodging, and per diem entitlements.

Term	Definition
Travel Voucher	Synonymous with Expense Report, Travel Claim, or Voucher. A written request, supported by documentation and receipts where applicable, for reimbursement of expenses incurred in the performance of official travel.
Voucher	Synonymous with Expense Report, Travel Claim, or Travel Voucher. A written request, supported by documentation and receipts where applicable, for reimbursement of expenses incurred in the performance of official travel.
WBT	Web-based Training
www / WWW	World Wide Web
Work Group	Identifies authorized Approvers for Travel Plans and Expense Reports and is used by FedTraveler.com in conjunction with Approval Chains for routing documents.
YCA	Fare basis code that designates a guaranteed coach class Airline City Pair fare.