

U.S. General
Services Administration



GO.gov® Agency Administration and Reporting User Guide

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Agency Administration

This User Guide offers comprehensive instructions for Travel Administrators (TAs), Proxy Administrators (PAs), and Senior Travel Administrators (STAs). These steps ensure precise and compliant expense reimbursement.

The Travel Administrator (TA) is an agency, department, or bureau-level administrator. This user may leverage the Processor (Read-Only) and Verify permissions to complete their duties. This role is read-only, apart from approving or rejecting receipt exceptions within the optional Verify permission. A Travel Administrator can be assigned to one or more user groups and can view travel requests or expense reports for any Traveler within those assigned user groups.

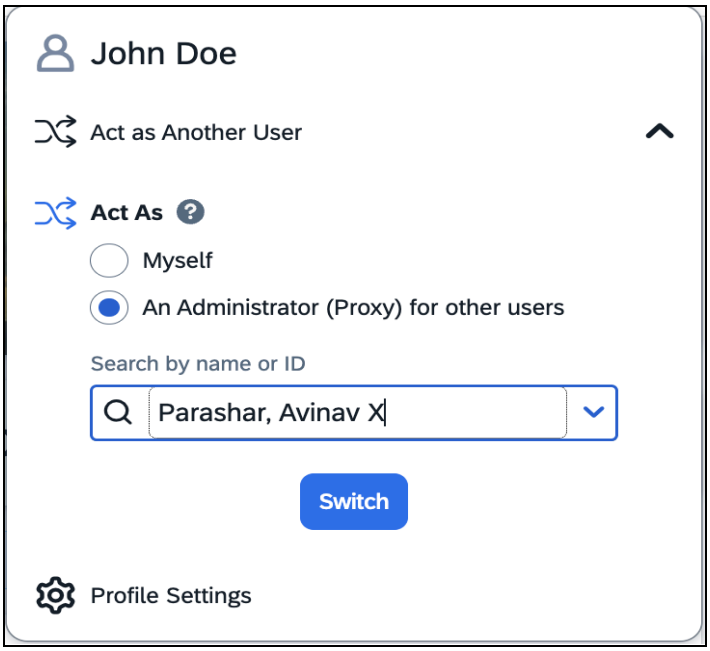
The Proxy Administrator (PA) leverages the Proxy permission to review, edit, and submit travel requests and expense reports on behalf of another user, including invitational travel. This user cannot book travel on behalf of another user. A Proxy can be assigned to one or more user groups and can act on behalf of any Traveler within those assigned user groups.

The Senior Travel Administrator (STA) is an agency-level administrator that is assigned the highest permissions and has the ability to take action on behalf of another user. These actions include approving, rejecting, or updating travel requests and expense reports. This user may leverage the Processor, Proxy, and Verify permissions to complete their duties. A Senior Travel Administrator can be assigned to one or more user groups and can act on behalf of any Traveler within those assigned user groups.

In the following sections, the applicable permissions for each task are indicated in parentheses.

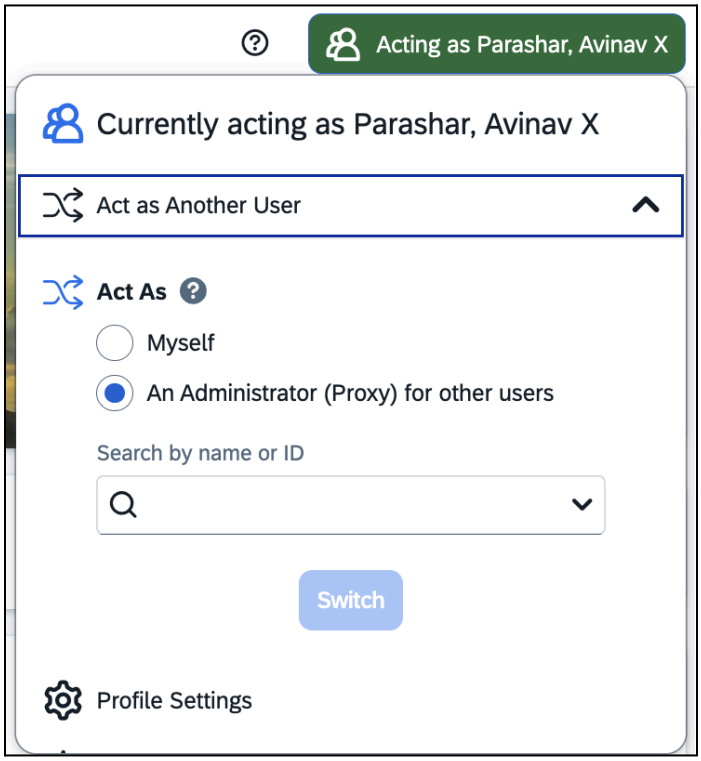
Acting as Another User (PA, STA)

1. In the top right corner of the GO.gov homepage, select the **Initials** or **Person** icon.
2. Select **Act as Another User** from the drop-down menu.
3. Select **An Administrator (Proxy)** for other users.
4. Search for the user by typing a name in the search bar.
5. Select **Switch**.



Viewing User's Profile (PA, STA)

1. Review the user's homepage and confirm that the green **Acting as** label is present.
2. Select the green "Acting as…" label for the user.
3. From the drop-down menu, select **Profile Settings**.



Updating the Editable Fields in User Profiles (PA, STA)

Agency Administrators can add new users to GO.gov in a few different ways. They can leverage the Profile Creation feature in the Self-Service Portal for individual user creation. Additionally, all User Profile updates can be performed through the SFTP Import Process. One or more users can be added to the import file to be loaded.

Note: The Service Desk can only be used for limited profile updates. While all User Profile Updates can be performed through the Profile Import Process, the following fields can be updated by our Service Desk Admins only if necessary:

- First Name
- Middle Name - Can be changed via Proxy as well, only if the field is blank. If data already exists in this field, proxy updates are not possible
- Adding Delegates, Updating Approvers - Preference is via Import, as applying a delegation is elevating a user's access.

Use the SFTP Import Process for the following:

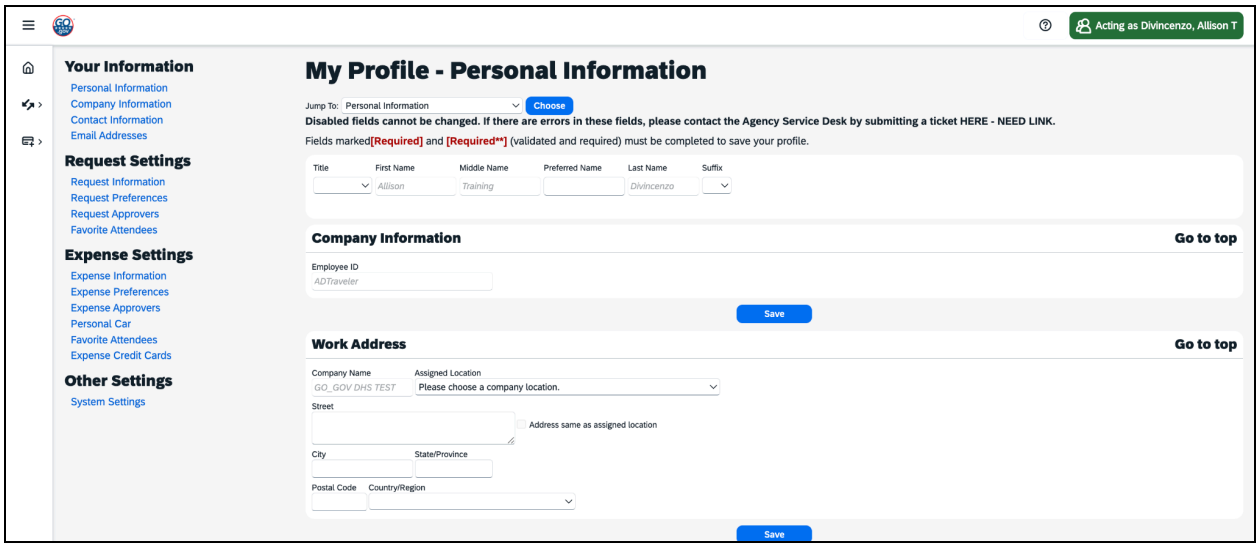
1. **Creating New Users:** Agency Administrators can use the Profile SFTP Import Process to create new users in bulk in GO.gov (they can also leverage the New User Creation feature in the Self-Service Portal for individual user creation).
2. **User Profile Updates:** All profile updates can be performed through the SFTP Import Process. One or more users can be added to the import file to be loaded. The following should always be updated using the SFTP Import Process.
    a. **Login ID:** Impacts login credentials
    b. **Last Name:** Last names need to be confirmed within the Agency's HR system and on the user's ID
    c. **Employee ID:** Impacts payment and updating field would fail any in-flight requests.
    d. **Vendor ID:** Impacts financial payment processing.
    e. **Email:** Impacts communications.
    f. **Rule Changes:** Not maintainable.
    g. **Roles & Permissions:** User: Travel Wizard, Request, Expense
    h. Approver: Request, Expense

The following steps detail how to update an individual's editable fields in their User Profile using the Proxy Administrator role.

1. On the **My Profile – Personal information** page, update the information as needed.
    a. **Name**: Title, Suffix, Middle Name (only if the field is blank in the user profile from initial import), Preferred Name.

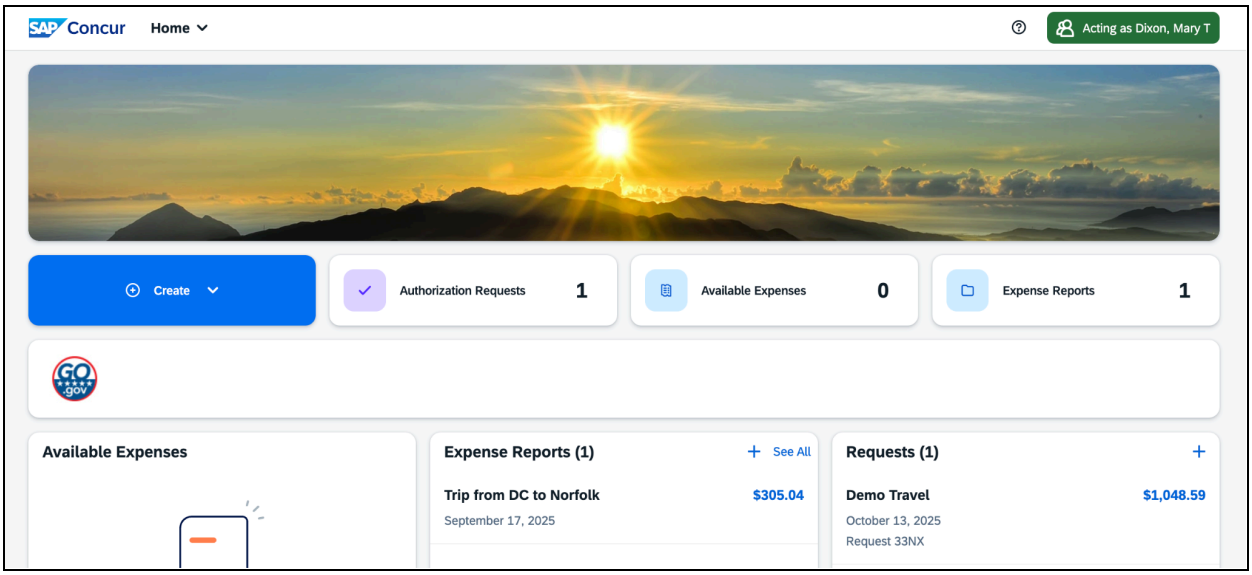
b. **Work Address**: Company Name (Search for Company Locations, Street, City, State/Province, Postal Code, Country/Region (auto filled).
c. **Home Address**: Street, City, State/Province, Postal Code, Country/Region (auto filled).
d. **Contact Information**: Work Phone, Work Extension, Work Fax, 2nd Work Phone/Remote Office, Home Phone, Pager, Other Phone, Mobile Phone Country/Region, Mobile Phone.
e. **Email Address**: Verify your email address which is prepopulated, Alternative Email.
f. **Emergency Contact**: Name, Relationship, Street, City, State/Province, Postal Code, Country/Region, Phone, Alternate Phone, Alternate Phone.
g. **Travel Preferences:** (not ticket delivery method, that depends on TMC), Frequent Travel Programs.
h. **International Travel: Passports and Visas**: Passport Nationality, Passport Number, Passport Date Issued, Passport Expiration, Passport Place Issued, City, and State, Passport Place Issued, Country/Region.
i. **Credit Card Information**

2. Select **Save**.



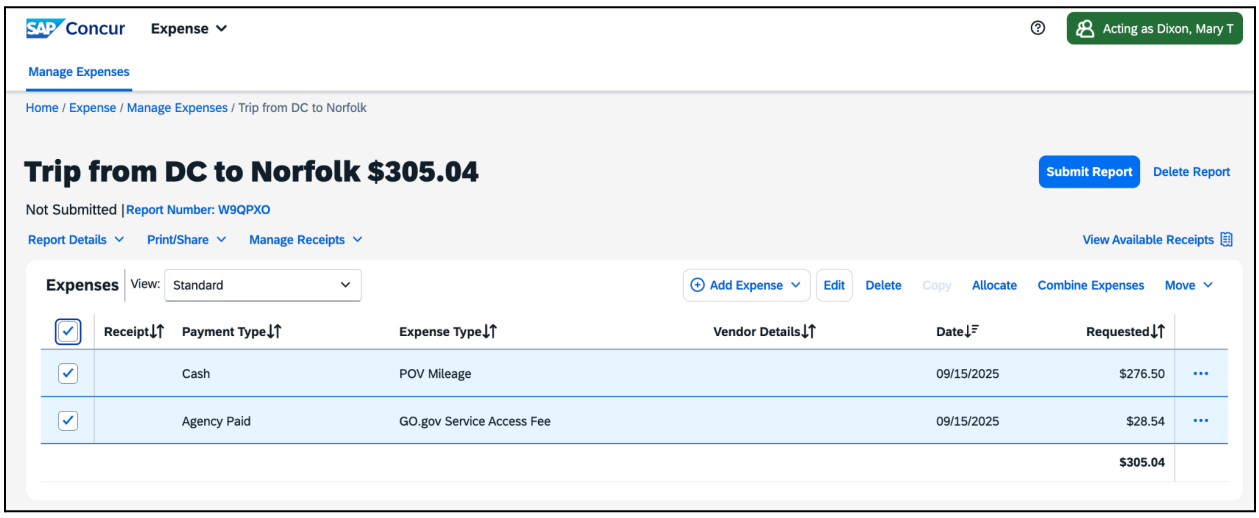
Viewing User's Requests or Expense Reports (PA, STA)

1. Select a **Request** or **Expense Report** on the user's homepage to view it.
2. Alternatively, use the **Home** drop-down, or the **Authorization Requests** or or **Expense Reports** tiles in the Action Hub.



Updating and Submitting Expense Reports (PA)

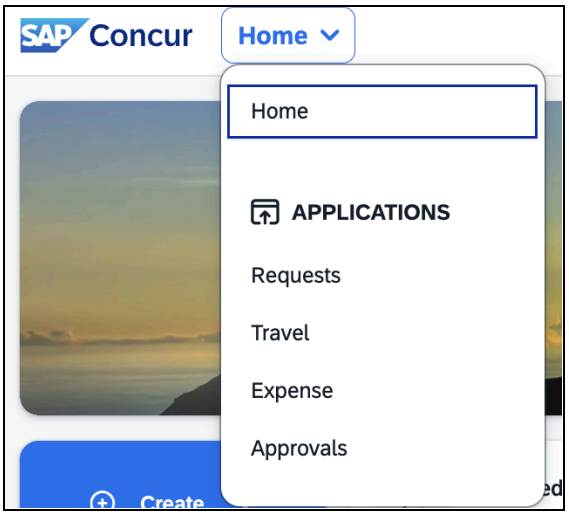
1. After opening a traveler's expense report, edit and allocate it as needed.
2. Select **Submit Report**.



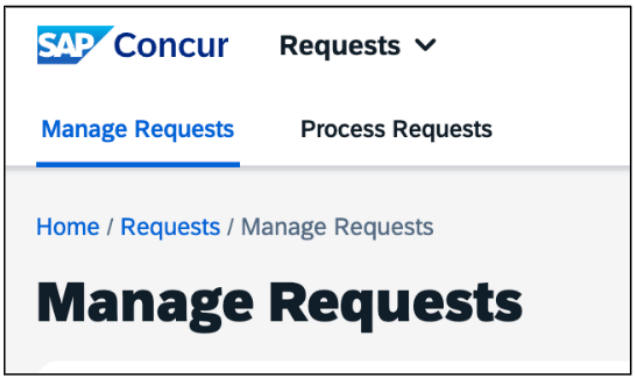
Searching for and Viewing Travel Requests and Expense Reports (TA, STA)

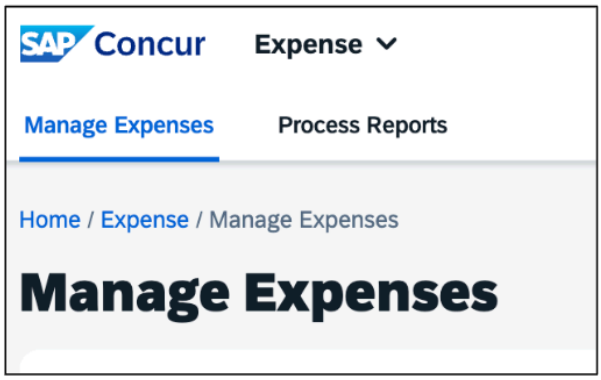
Note: When a Travel Administrator or Senior Travel Administrator needs to view a travel request or expense report that is outside of their typical workflow, they should search for the document using the following steps.

1. Under the **Home** drop-down, select either **Request** or **Expense**.

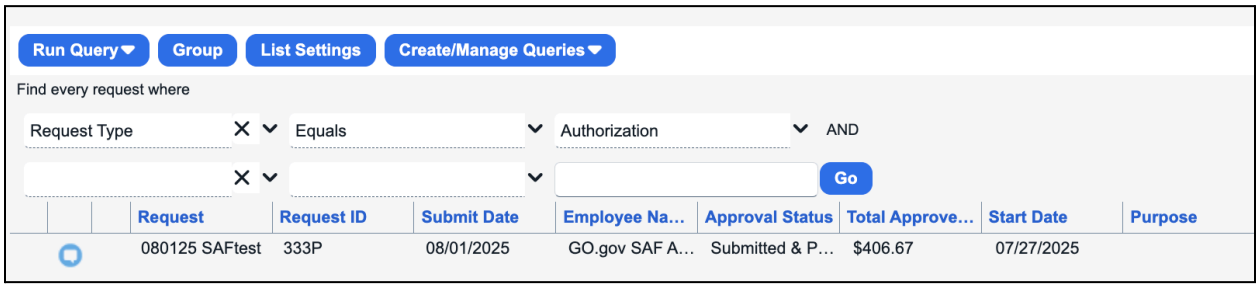


2. To view reports, in the Request module, select the **Process Requests** tab. In the Expense module, select the **Process Reports** tab.

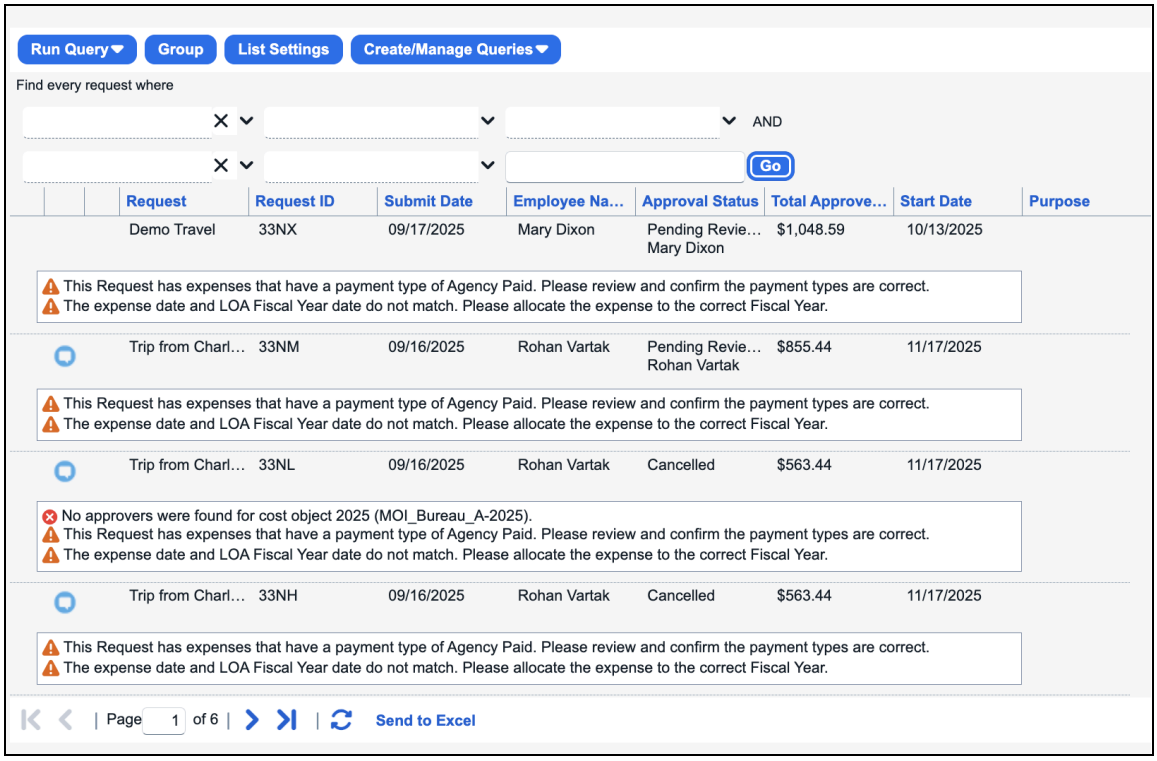




3. Enter the search criteria by using the first drop-downs to enter the type of search criteria. Use the second drop-downs to enter additional search information, then select **Go**.

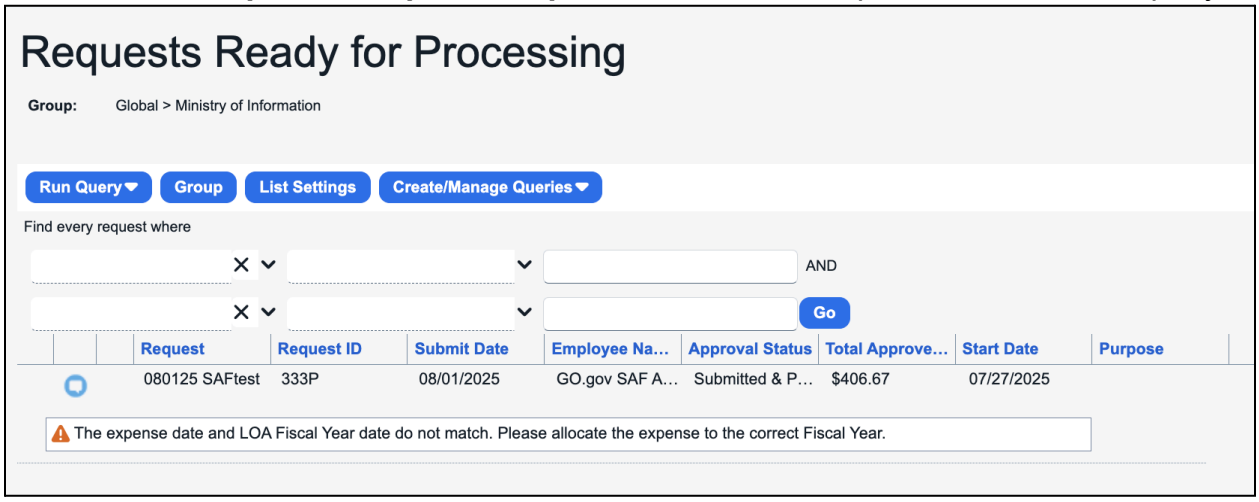


4. Export to excel by selecting **Send to Excel**.

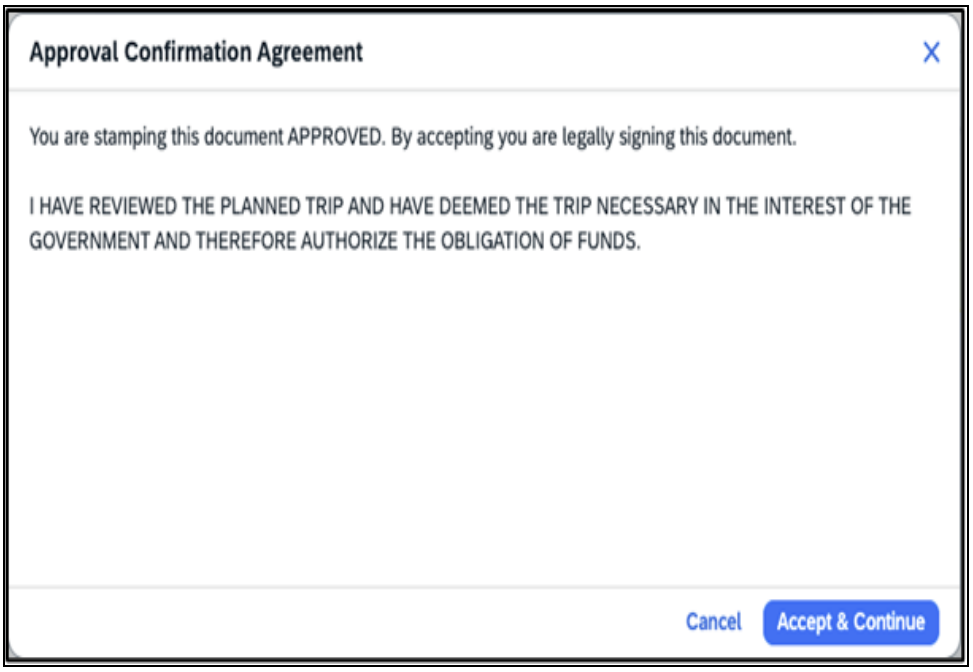


Approving Requests and Expense Reports (STA)

1. Select **Request** or **Expense Report** and locate the report via a search or query.

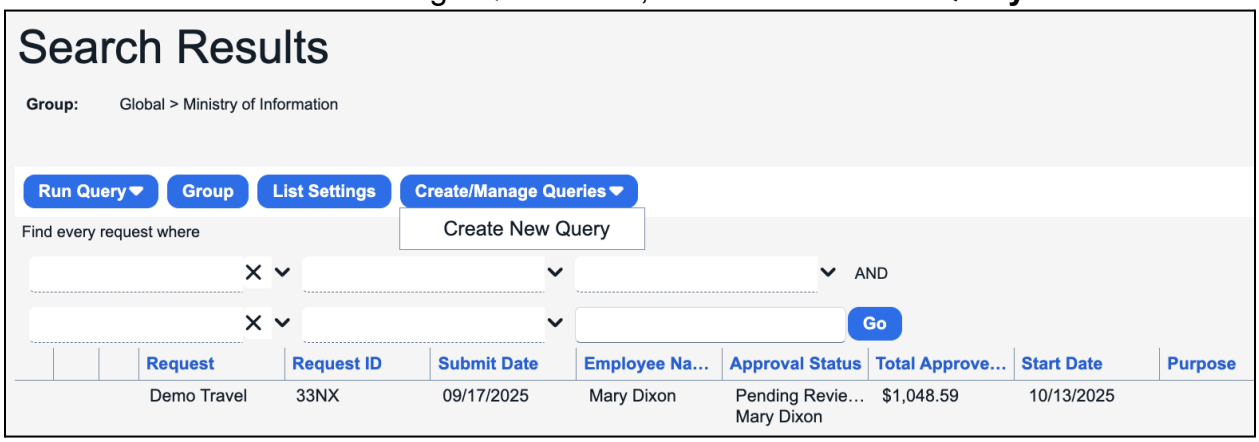


2. Review the report contents, then select **Approve**. From the pop-up window, select **Accept & Continue**.



Creating and Saving Queries (TA, STA)

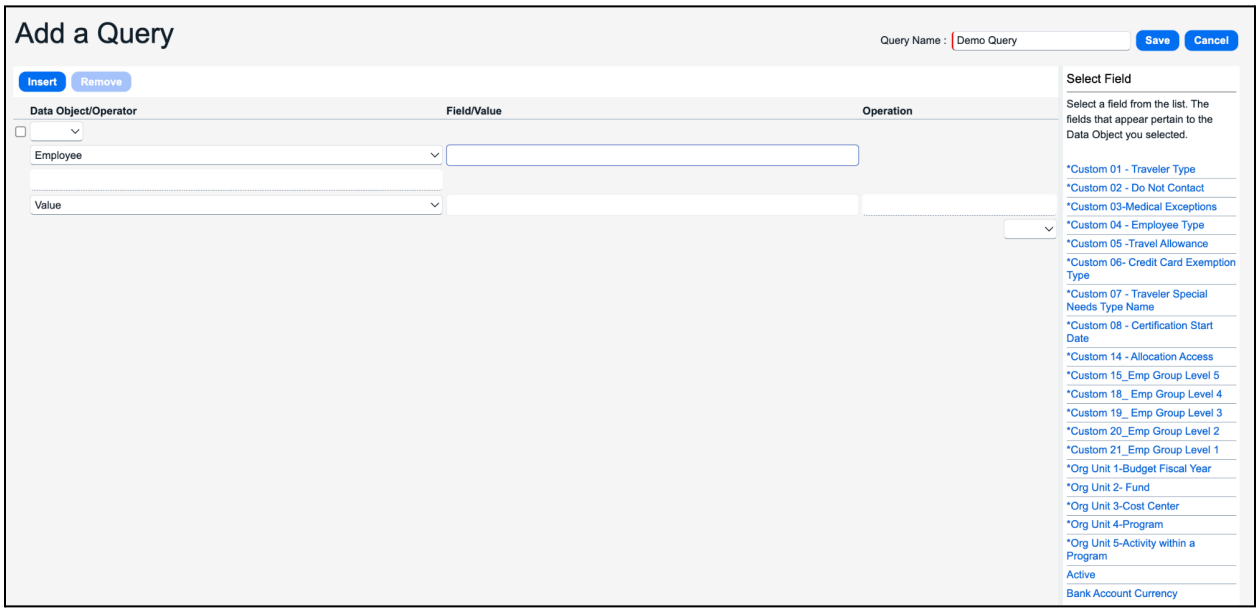
1. Under the Create/Manage Queries tab, select **Create New Query**.



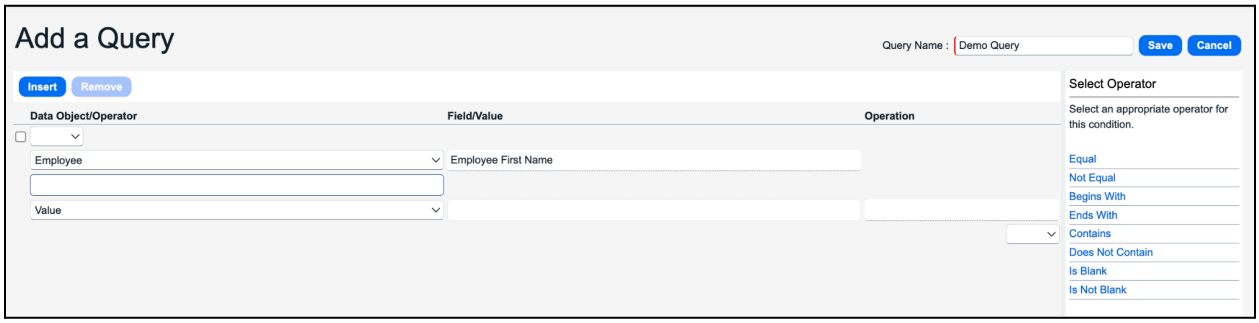
2. Enter a **Query Name**.
3. Use the drop-down to enter the **Data Object**.



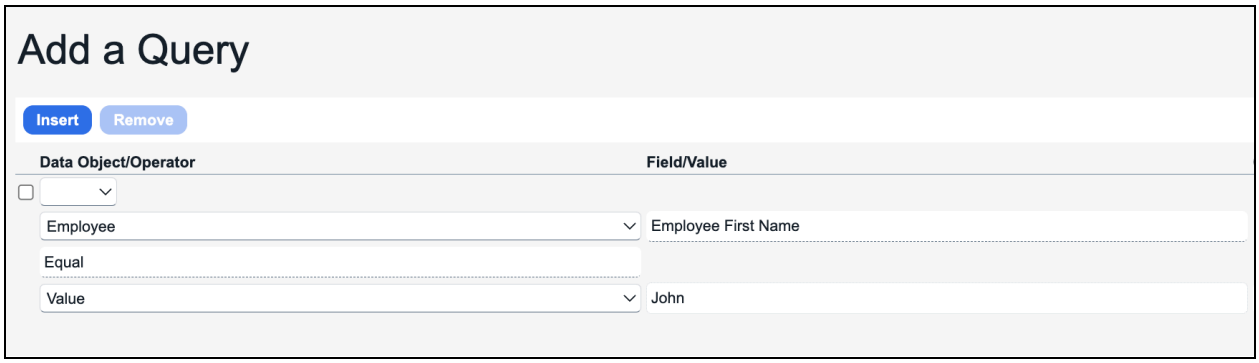
4. Use the list of data in the sidebar to select a **Field/Value**.



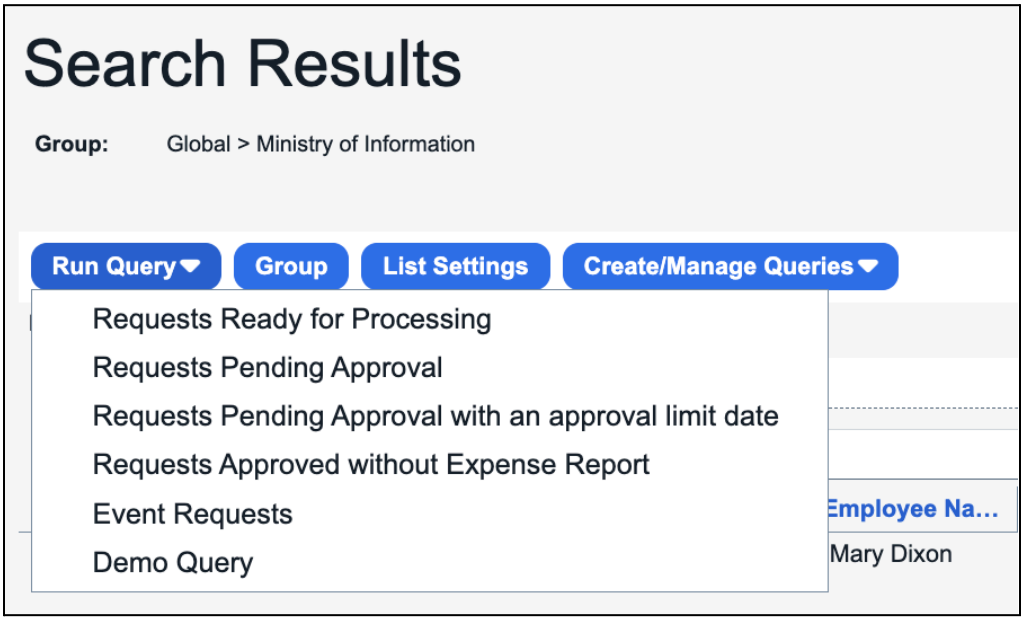
5. Use the list of data in the sidebar to select an **Operator**.



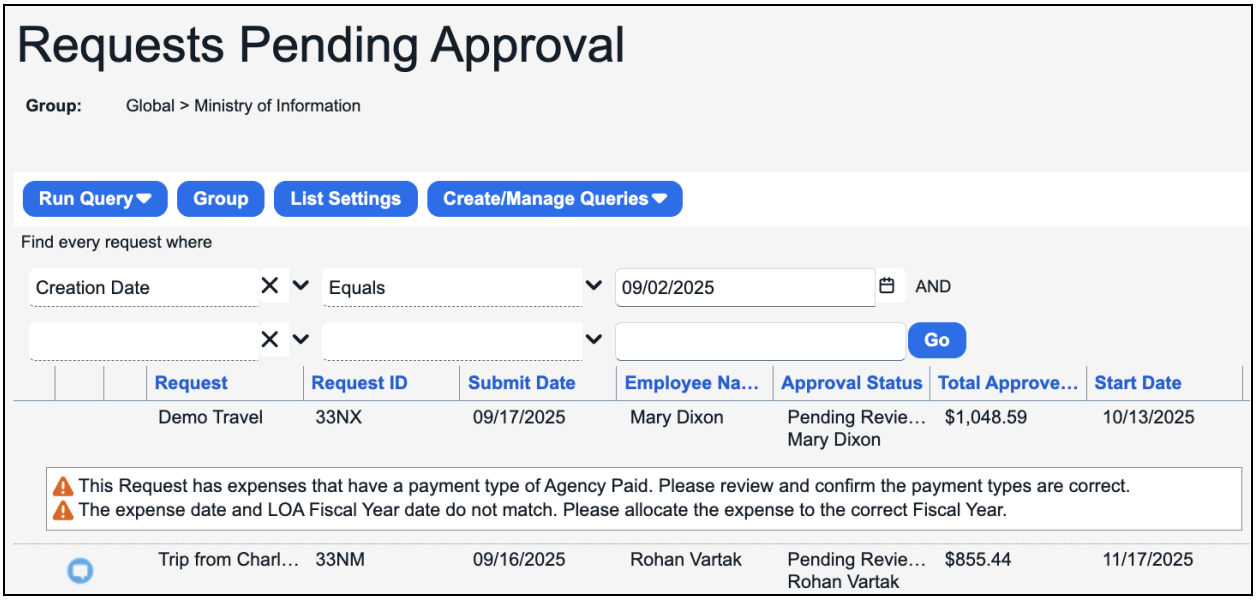
6. The Value field defaults. Enter the value you want to search for in your query, then select **Save**.



7. Under the Run Query drop-down, select the query.
   Note: Some queries have been pre-populated for your convenience.



8. To search within a query, after running the query, use the first drop-down to enter the type of search criteria. Use the second drop-down to enter additional search information.
9. Select **Go**.

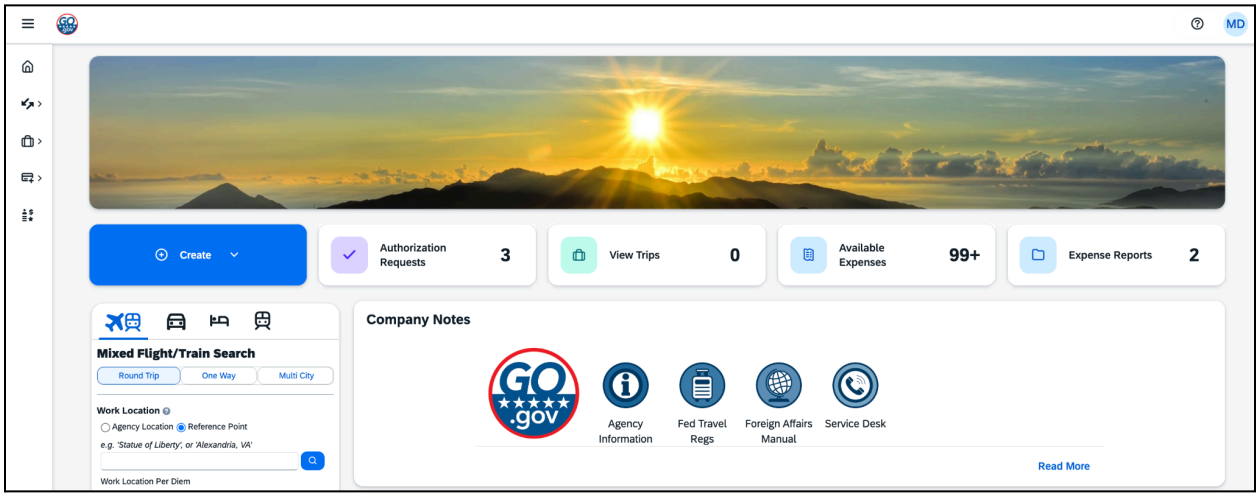


Admin Actions in the Self-Service Portal

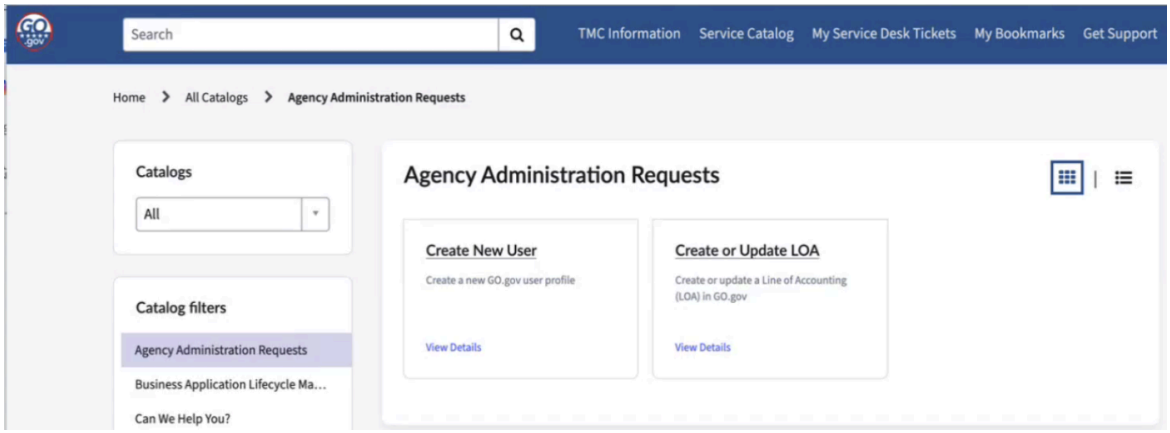
- Manage new user profile creation.
- Manage LOA creation, updates, or deactivation.
- Quicker and easier for admins
- Available 24/7 to admins, offering greater flexibility and convenience.

New User Creation

1. When you log into GO.gov, select the **Service Desk** icon to open the self-service portal.



2. Open the **Service Catalog**.
3. Select **Agency Administration Requests.**

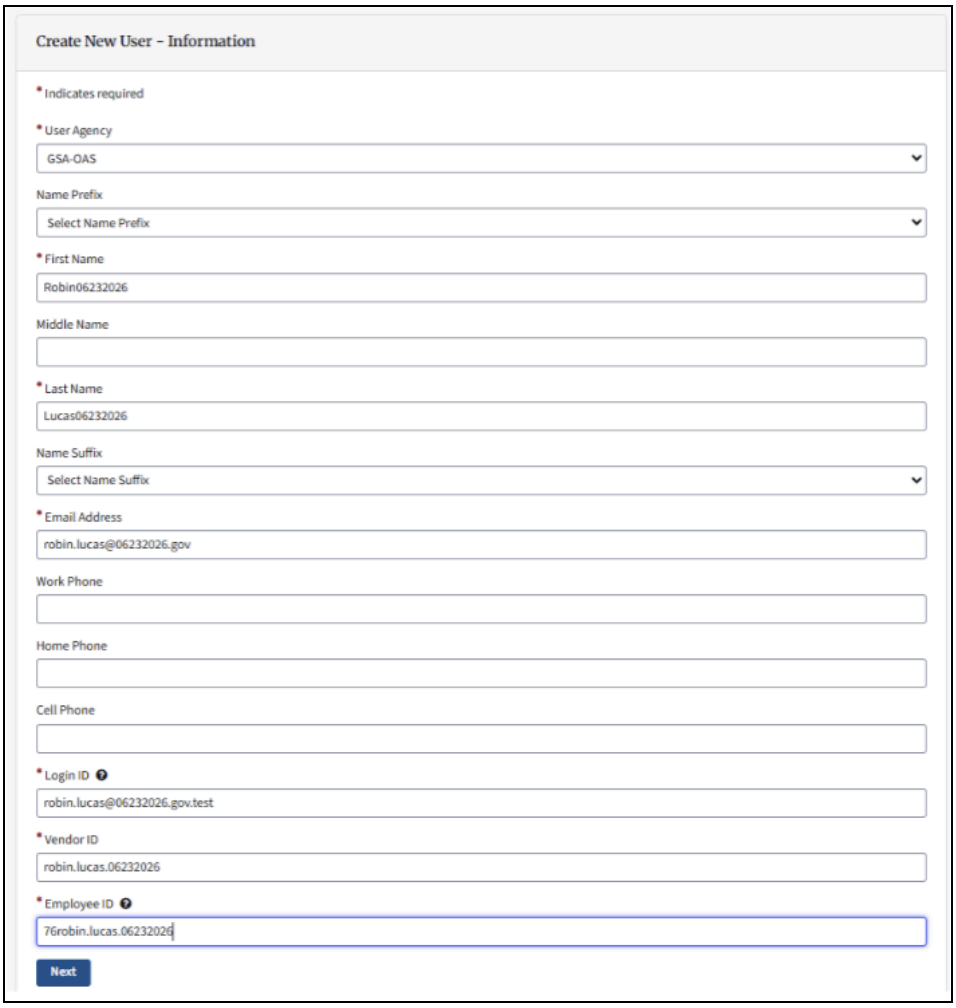


4. Choose **Create New User**.
5. Fill out the new user information:

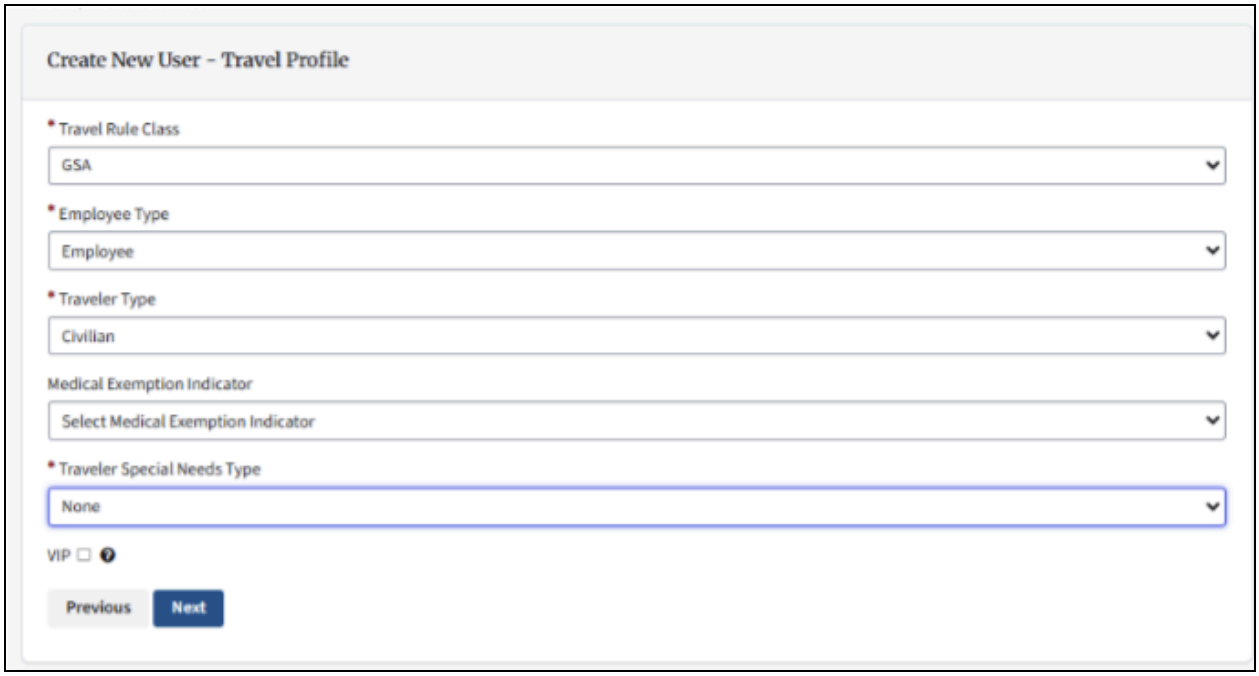
Create New User - Information: User Agency, Name Prefix. First Name, Middle Name, Last Name, Name Suffix, Email Address, Work Phone, Home Phone, Cell Phone, Login ID, Vendor ID, Employee ID

Notes:

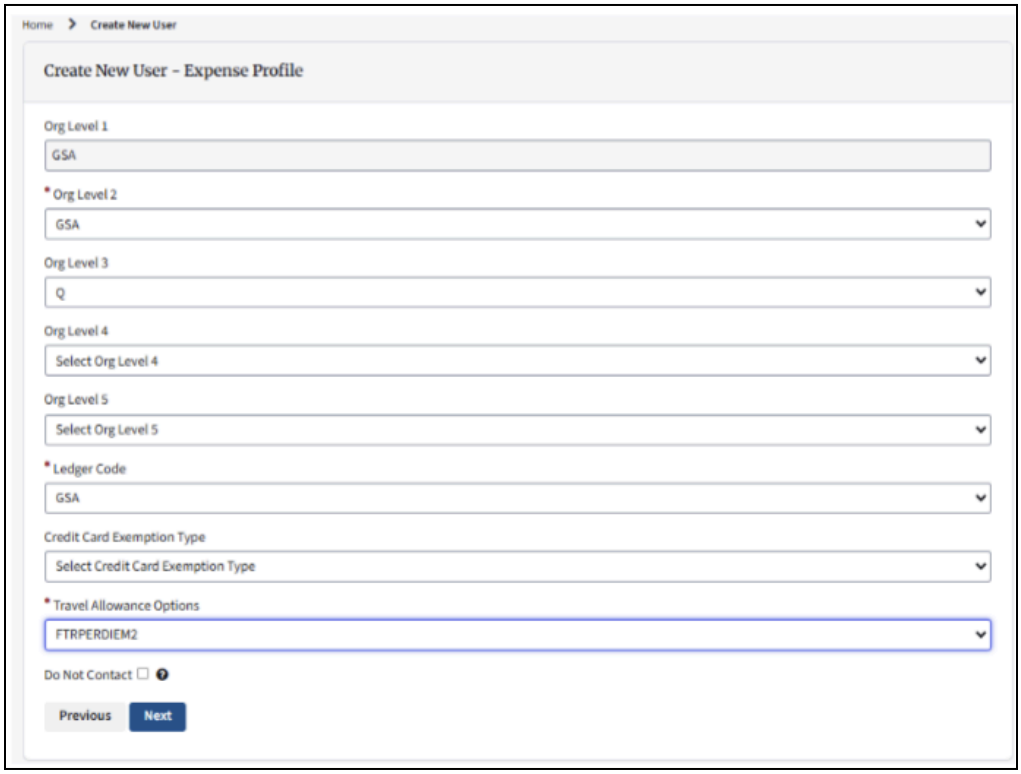
- Login ID: Email address of the employee plus a ".test" for SIT or ".go" for Production (e.g., John.Smith@fiscal.treasury.gov.go)
- Vendor ID: Unique to each Agency's FM system
- Employee ID: The two-digit employee prefix plus the user's Vendor ID



Create New User - Travel Profile: Travel Rule Class, Employee Type, Traveler Type, Medical Exemption Indicator, Traveler Special Needs Type, VIP

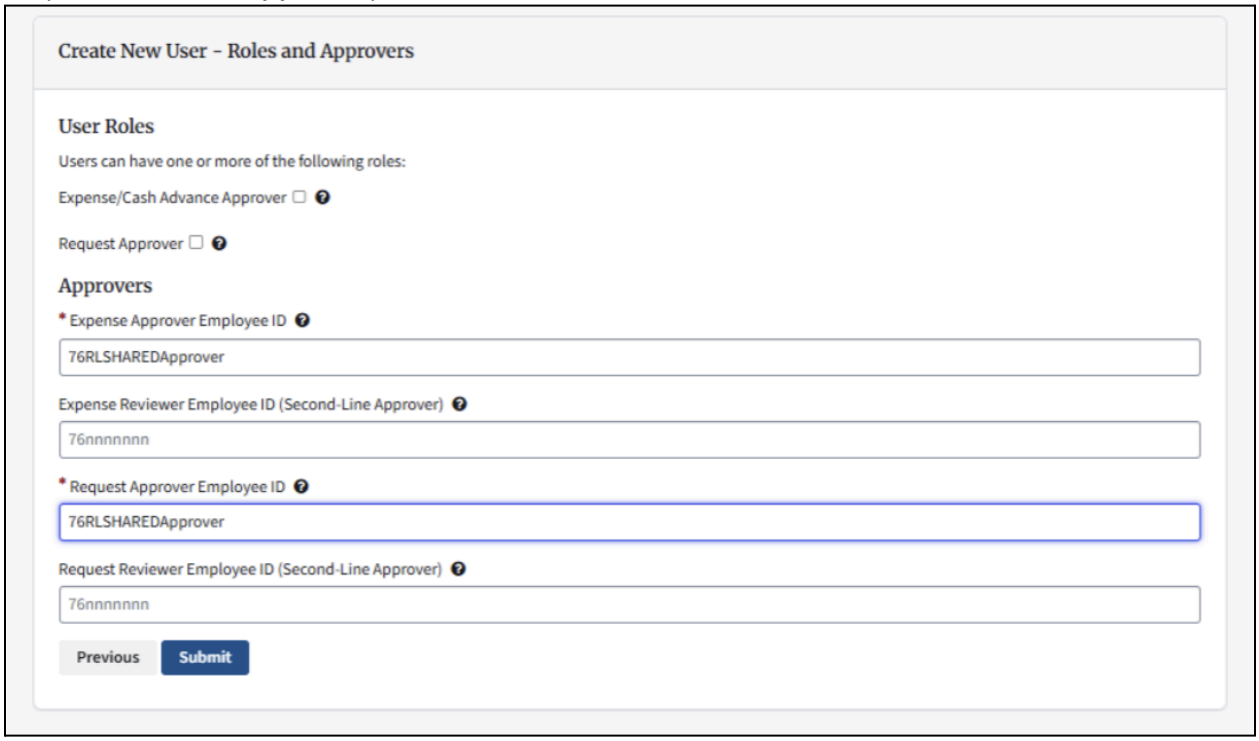


Create New User - Expense Profile: Org Level 1, Org Level 2, Org Level 3, Org Level 4, Org Level 5, Ledger Code, Credit Card Exemption Type, Travel Allowance Options, Do Not Contact



Create New User - Roles and Approvers: Expense/Cash Advance Approver, Request Approver, Expense Approver Employee ID, Expense Reviewer Employee ID

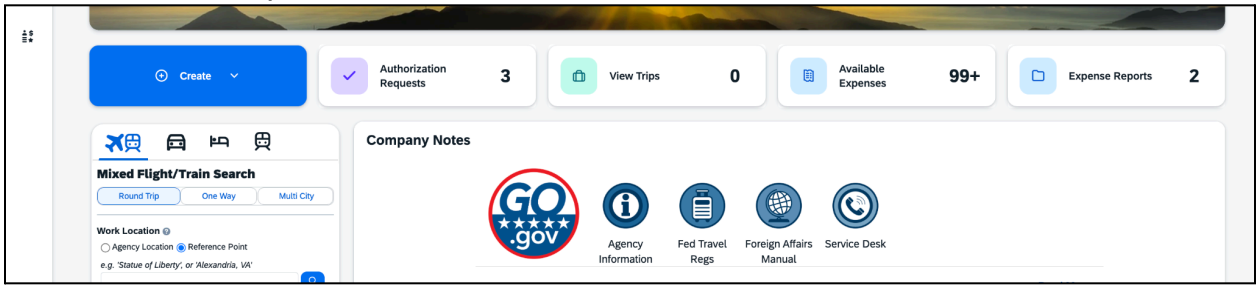
(Second-Line Approver), Request Approver Employee ID, Request Reviewer Employee ID (Second-Line Approver)



6. After submission, Administrators will receive either:
   a. A success email confirmation
   b. An error message if the user could not be created.
   c. Note: New users will appear in the GO.gov platform typically within ten minutes of successful submission, but time can range up to four hours.

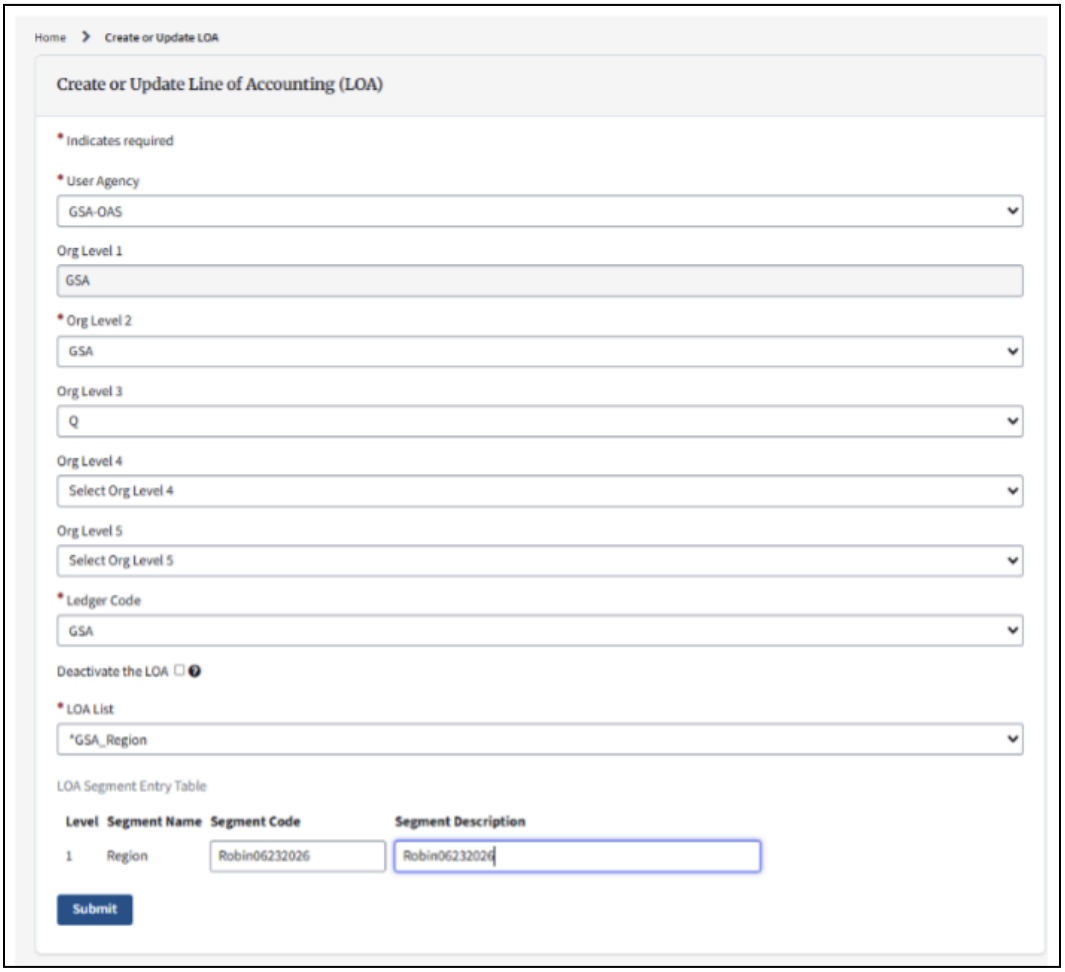
LOA Creation and Maintenance

1. When you log in to GO.gov, click on the **Service Desk** icon to open the self-service portal



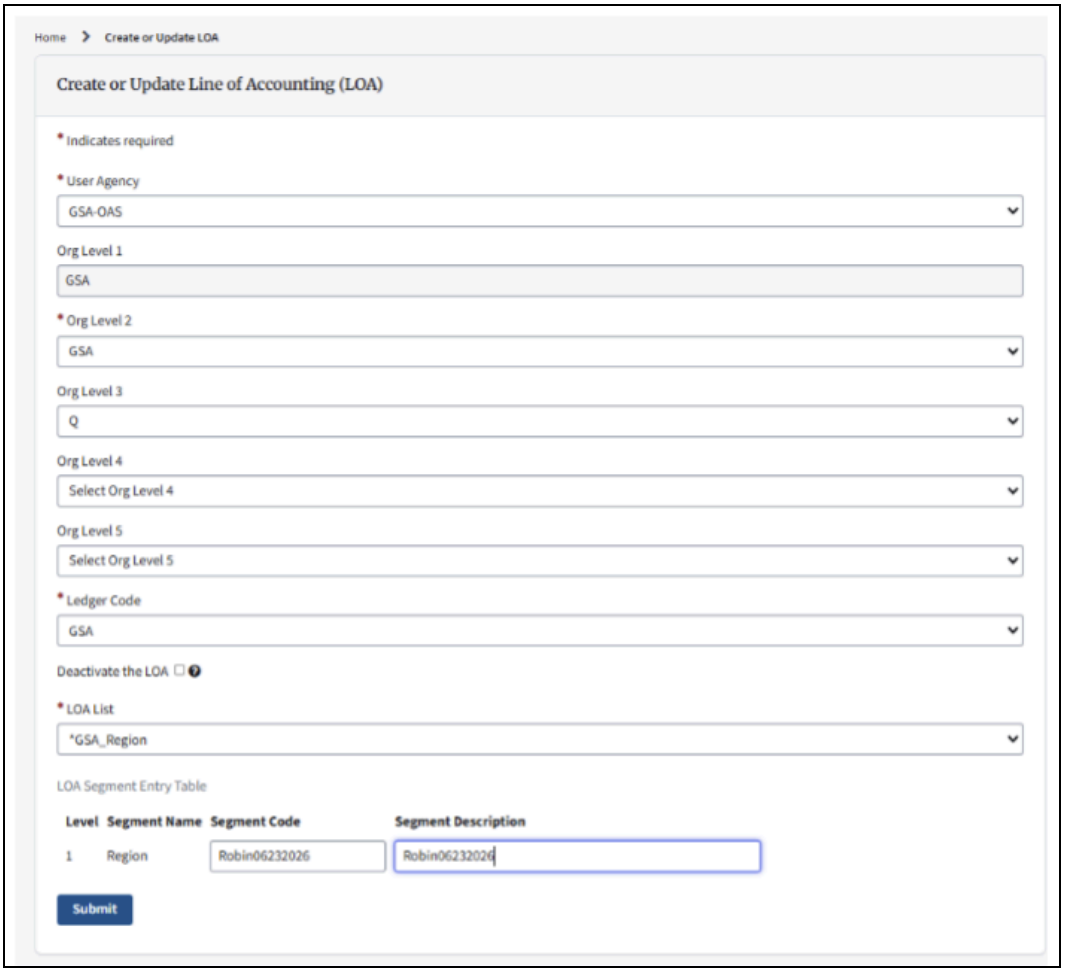
2. Open the **Service Catalog**

3. Select **Agency Administration Requests**
4. Choose **Create or Update LOA**
5. Fill out the **Create or Update LOA** form.



6. After submission, Administrators will receive either:
    - A success message confirmation, or
    - An error message to update the fields

    Note: LOA updates are instant in the GO.gov platform.
7. To update an LOA, enter the exact LOA information in all fields.
8. Make any necessary changes to the Segment Description field.
9. To deactivate an LOA, select the **Deactivate the LOA** checkbox underneath the Ledger Code field.
10. Select **Submit**.

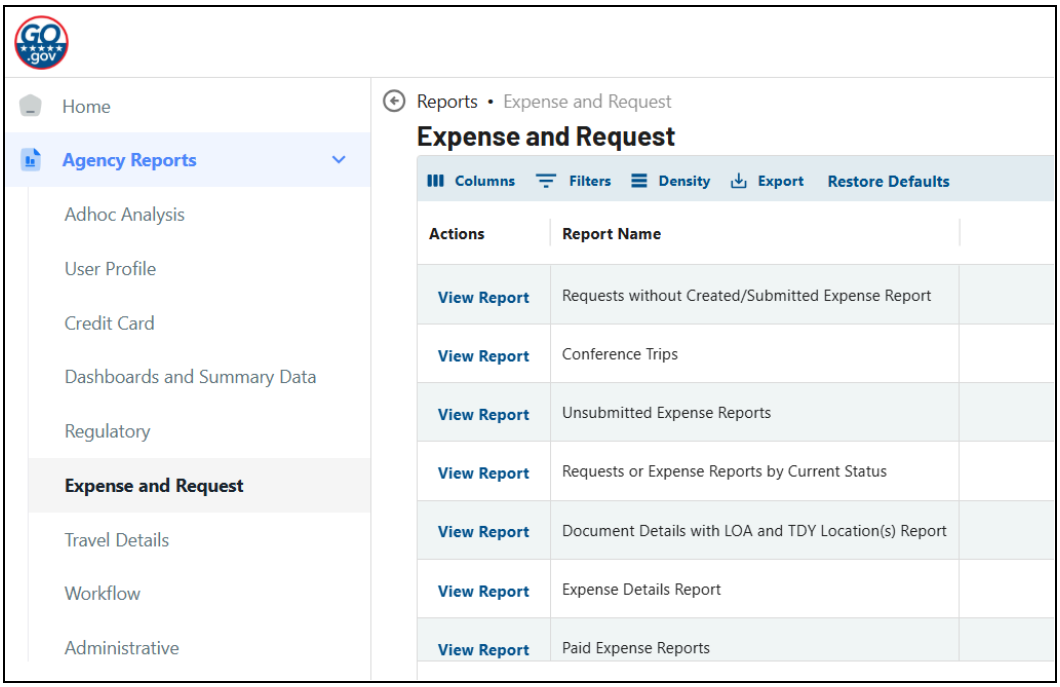


Standard and Custom Reports

This section provides step-by-step instructions for Report Readers and Authors to select, prompt, search, view, and sort reports within the GO.gov Reporting Tool. It covers key tasks including accessing pre-defined reports and helping readers and authors manage agency travel and expense reimbursements while ensuring compliance and accuracy. Access to the tool is limited to those in the agency that have been given a license.

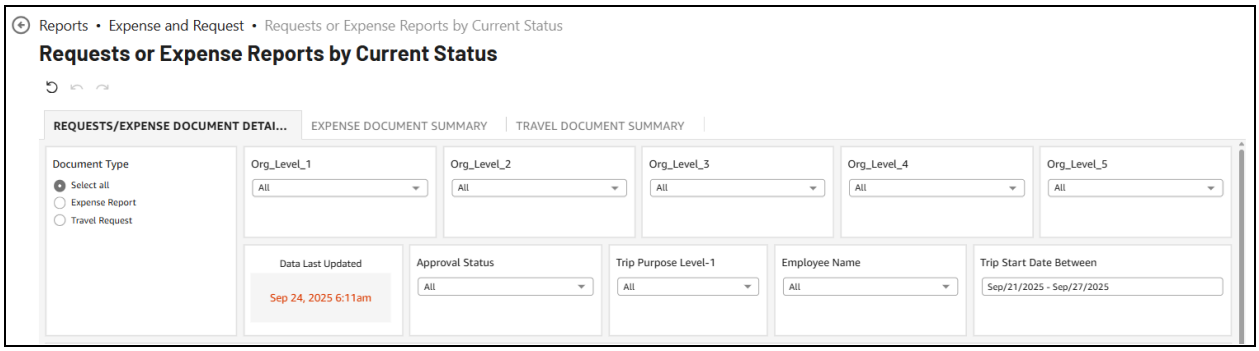
Accessing Standard Reports

1. From the left side of the GO.gov Reporting home page, select the **Agency Reports** drop-down menu.
2. Select the folder that contains the report you want to access.



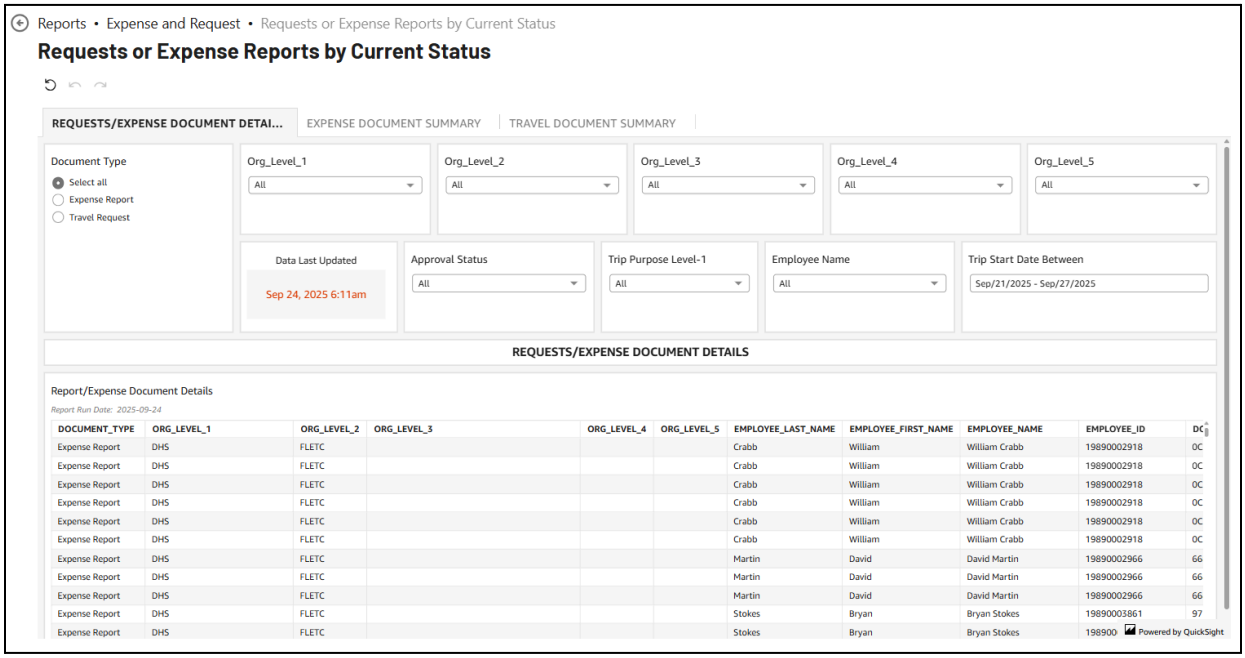
Important Reporting Considerations

- Prompts allow you to filter the data in your report. Different reports feature different prompts. Experiment with the prompts to view the data in whichever way is most useful for your reporting
- Data flows into Cornerstone overnight, when you look at reports the data is current as of the day prior.
- When you open a report, Cornerstone automatically runs it. All prompts are automatically set to show the current week. Use the calendar icon to adjust the date range to your applicable settings.
- Each user has org-level access and role-level security, meaning that they can only see the information that they have been granted permission to see. This is reflected in the Org Level prompts. If you select something that you do not have permissions to view, the report will not return any data.
- As you become familiar with the prompts available to you, you can bypass some of the higher org levels and only select the one that will show you more specific data.
- Your Cornerstone access is not connected to GO.gov so there may be users who can see data in queries in GO.gov, but not in Cornerstone.



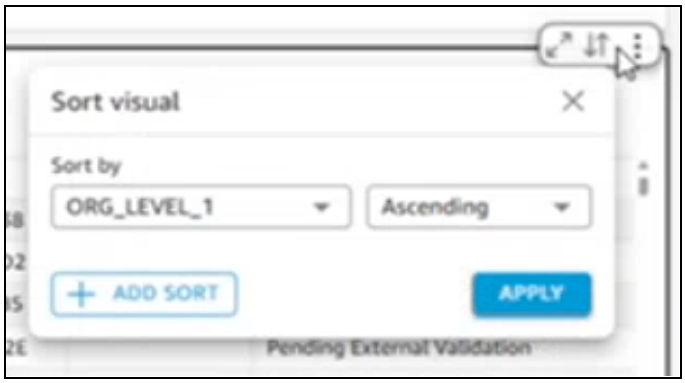
Viewing Data in the Table

1. From the left side of the GO.gov Reporting home page, select the **Agency Reports** drop-down menu.
2. Select the folder that contains the report you want to access.



Multi-sort

1. To multi-sort data, or sort by more than one category, select **Sort Visual**.
2. Use the drop-downs to determine the categories by which you will sort the data.
3. Use the drop-downs to indicate whether the data should be ascending or descending.
4. If applicable, add another sorting category by selecting **Add Sort**.
5. Select **Apply**.

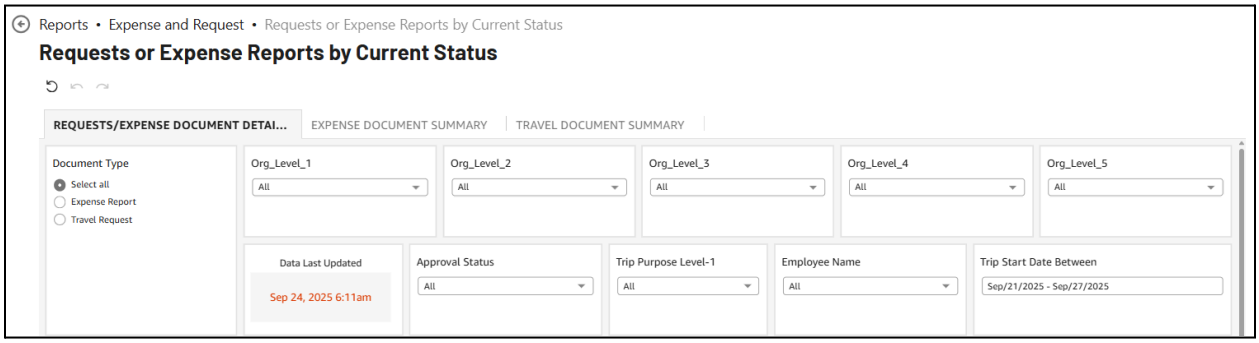


Navigate with Tabs

1. Select another report tab, Tabs may feature summaries, pivot tables, or data visualizations.

Notes:

- Prompt values that you have entered carry over from one tab to the next.
- Not all reports have multiple tabs or data visualizations.



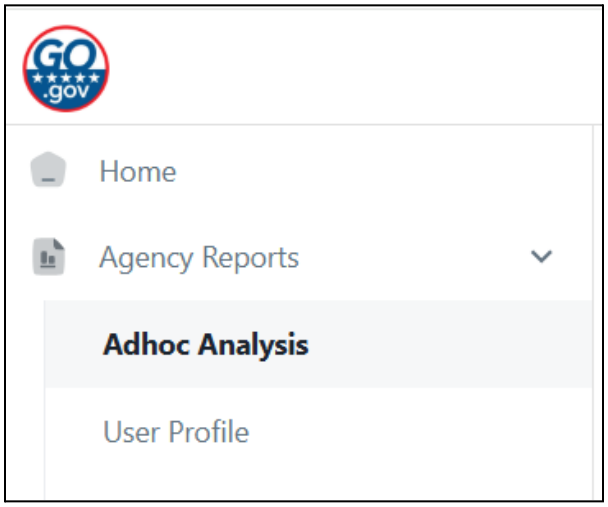
Ad Hoc Reports

This section equips GO.gov Reporting users with the Report Author permission with comprehensive instructions on crafting ad hoc reports. It details the process of selecting relevant data fields, applying filters, and structuring the report layout. By mastering these techniques, Report Authors can swiftly generate tailored insights to support informed decision-making and strategic planning within their organization.

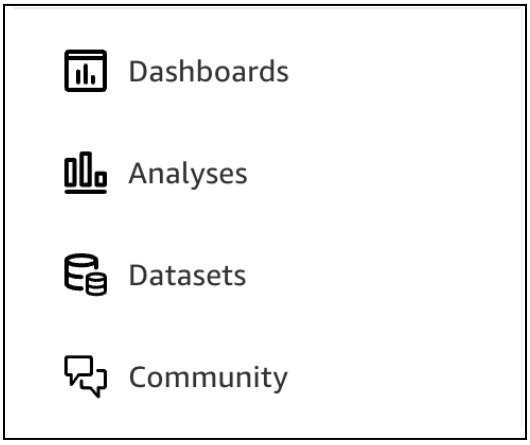
Note: For information about the data available in Ad Hoc reporting, refer to the available report catalogs and resources on Connect.gov.

Creating a New Ad-Hoc Report

1. On the left side of the GO.gov Reporting home page, select the **Agency Reports** drop-down menu.
2. Select the **Ad hoc Analysis** folder.

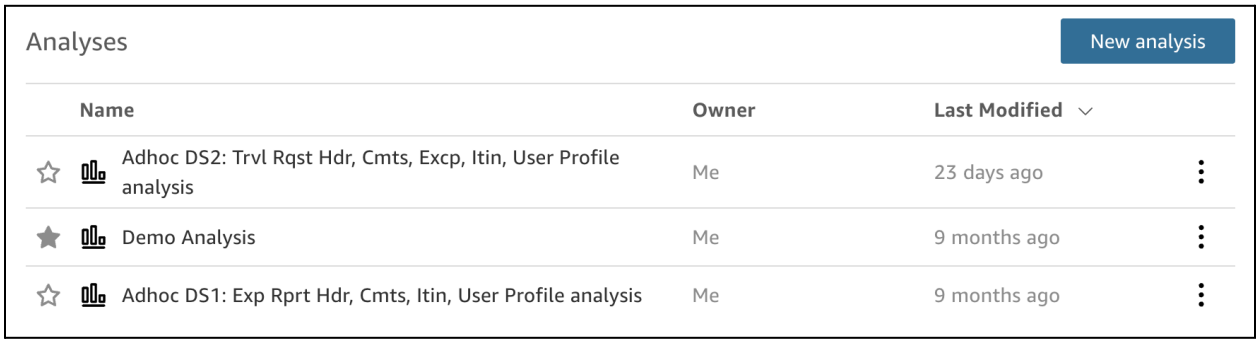


3. Select **Analysis** from the menu on the left.



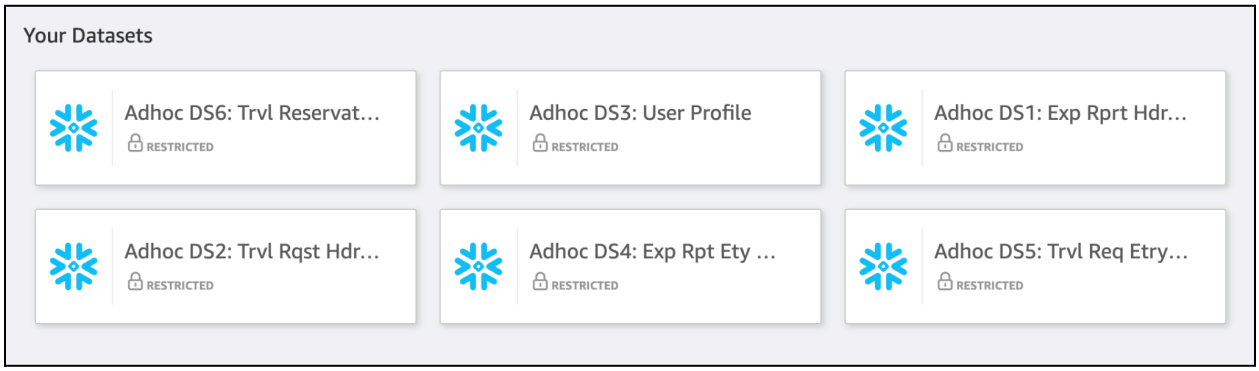
4. Any analyses that have already run will display. To create a new one, select **New**

Analysis.

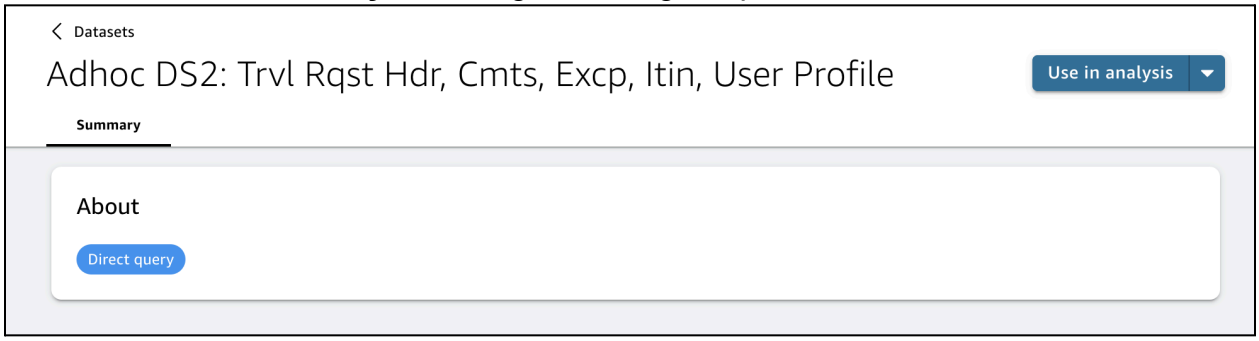


5. To view and select datasets, select a **Dataset**.

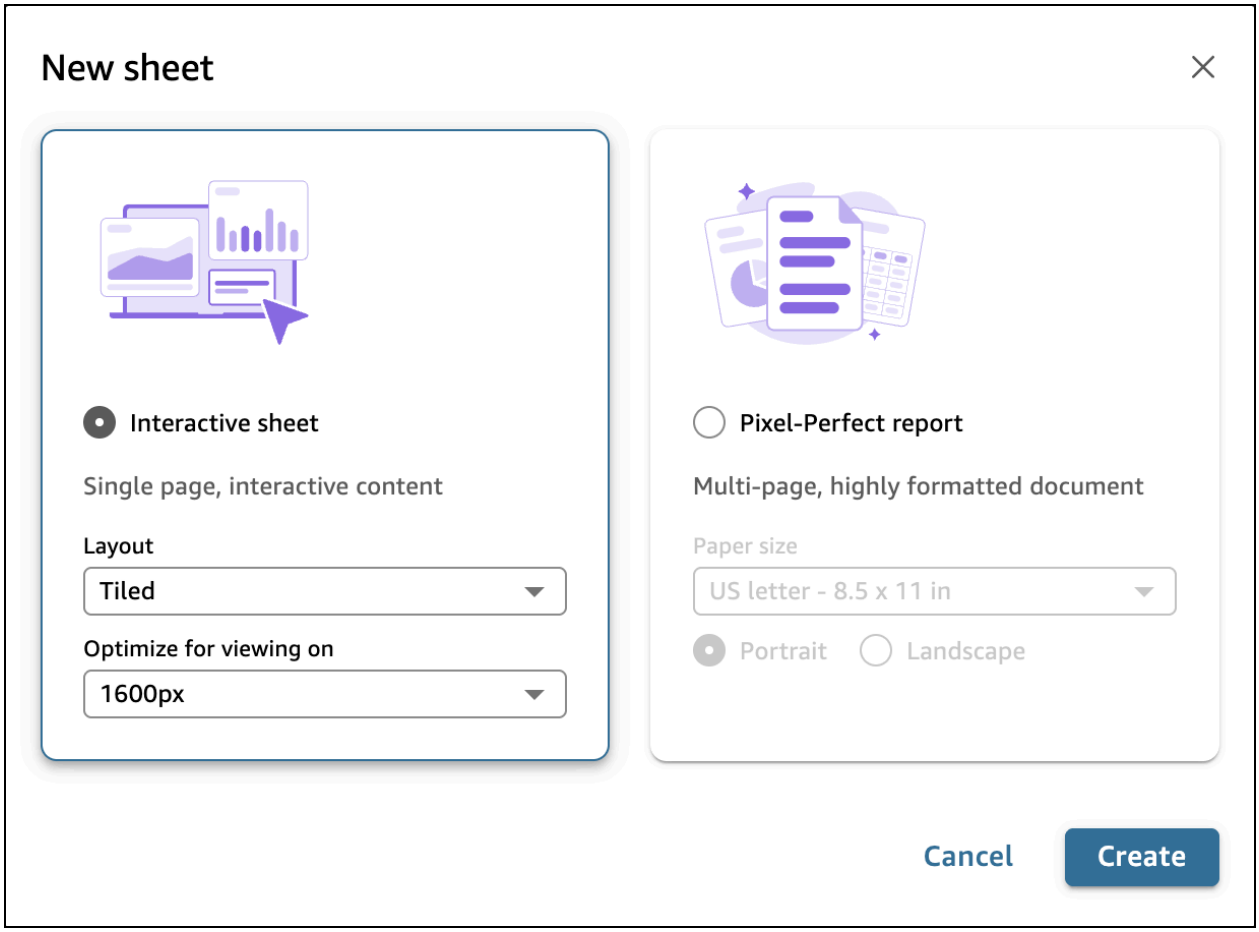
Note: A dataset is a source of information for the report. GO.gov users will only see their agency's datasets. All datasets will begin with the words "Ad hoc DS" and will be numbered 1-6.



6. Select **Use in Analysis** to begin creating a report.

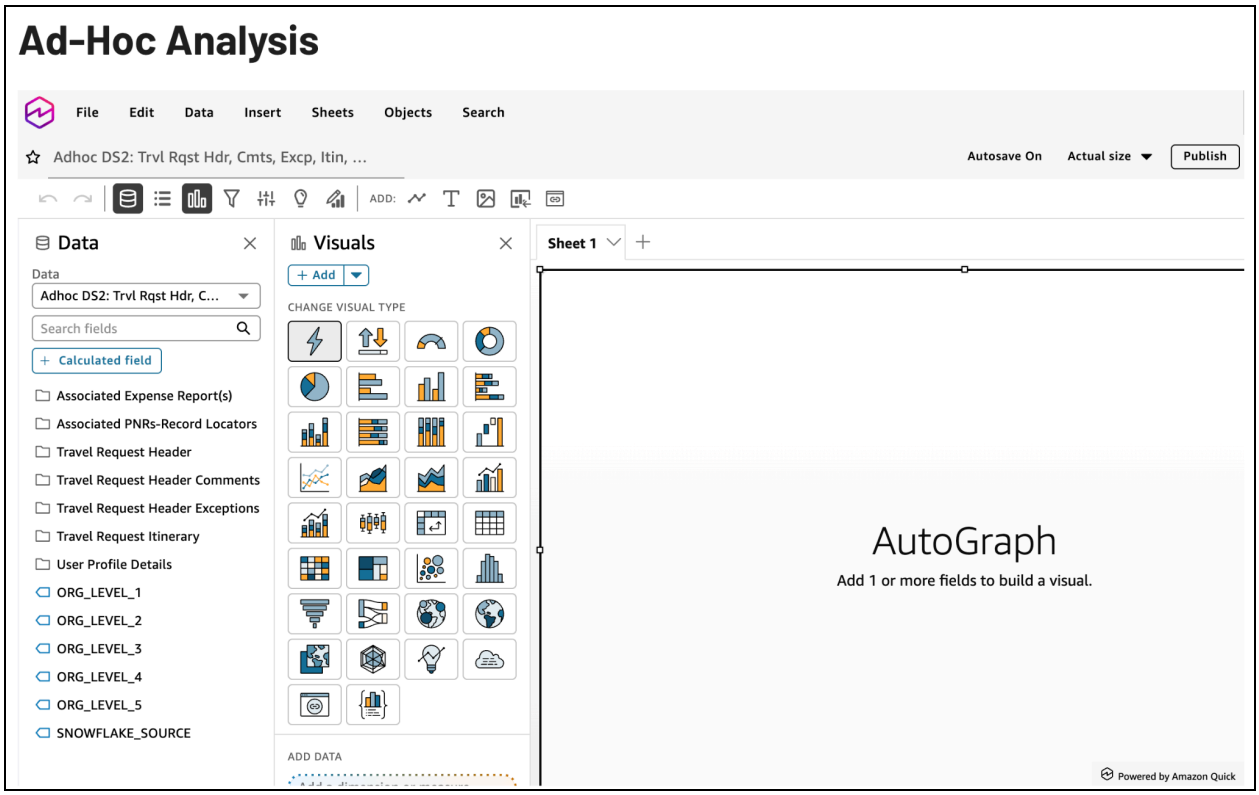


7. Define the parameters of your new report, then select **Create**.



Navigating the Report Builder

- Toolbar functions include **File**, **Edit**, **Data**, **Insert**, **Sheets**, **Object**, and **Search**.
- The icons at the top of the report builder can show or hide individual panels, such as **Data**, **Visuals**, **Filters**, **Parameters**, and the **Workspace**.



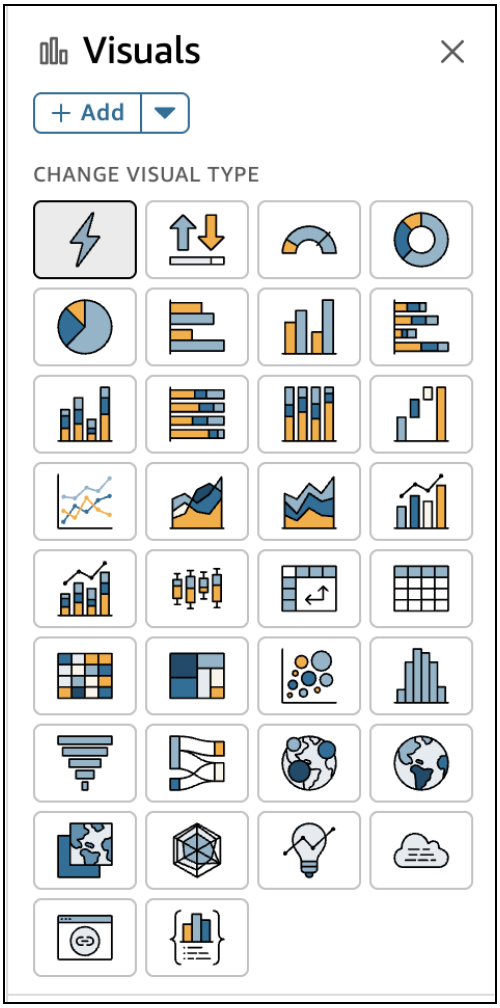
Understanding Datasets

- Information in a dataset is divided into folders based on topic.
- All folders within a dataset contain dimensions and measures that can be added to an ad-hoc report.

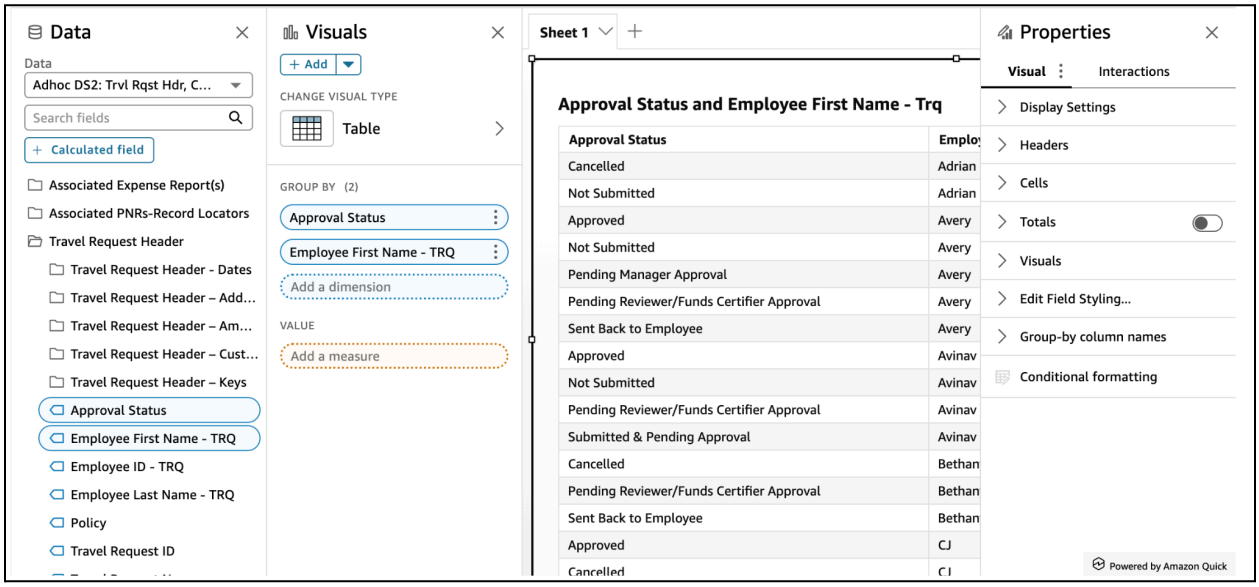
Building a Report or Visualization

1. Select a visualization type from the **Visuals** menu.

Note: The most common visualization format is a table, but GO.gov also supports pie charts, bar graphs, and more. You can add multiple visualizations to the same ad hoc report.

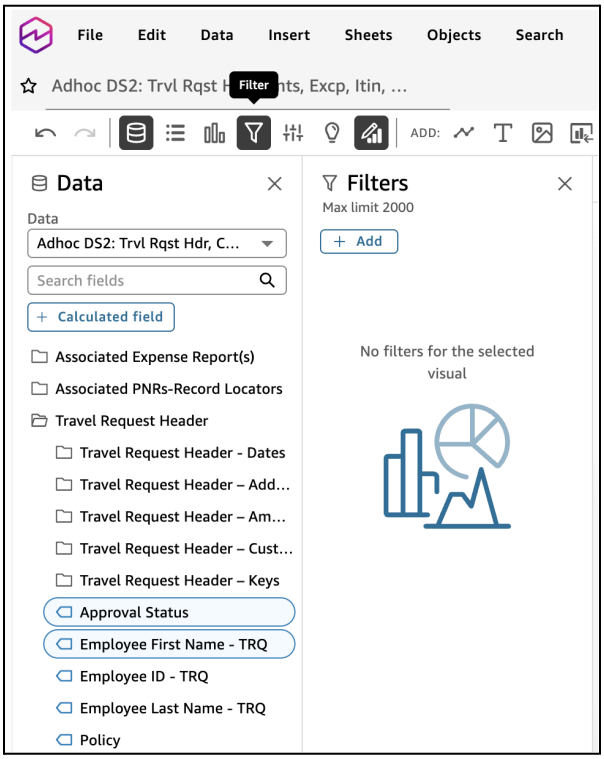


2. Drag and drop dimensions and measures from your dataset into the **Visuals** column. This automatically pulls the data into your new report.
3. If applicable, use the **Properties** menu to adjust your report to your preference.

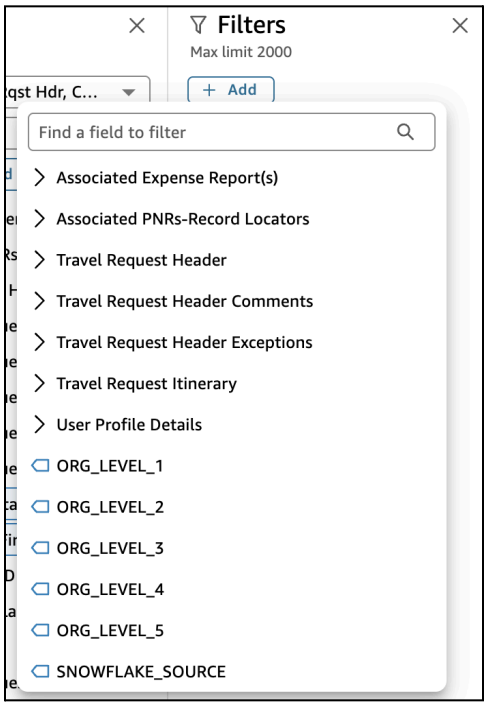


Adding a Filter

1. Select the **Filter** icon. This opens the filters menu.
2. Select **Add**.



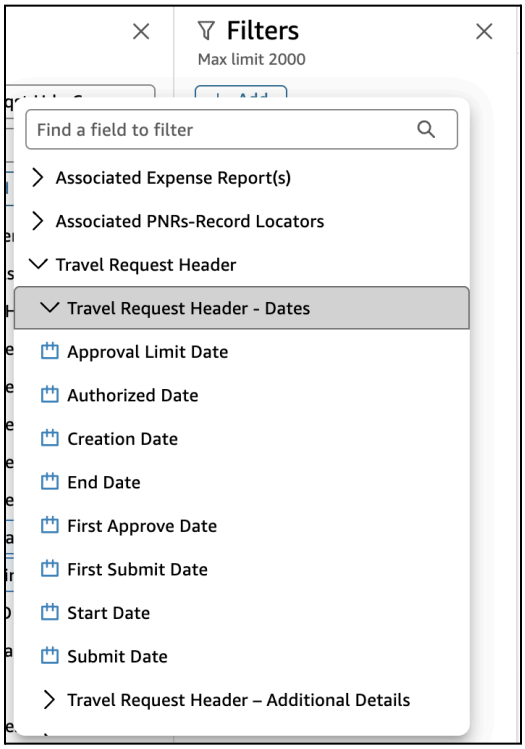
3. Select the value from the drop-down that you would like to filter by.



4. Use the checkboxes to select which values you want to include or exclude in the

filter.

5. Select **Apply**.



Report Scheduling

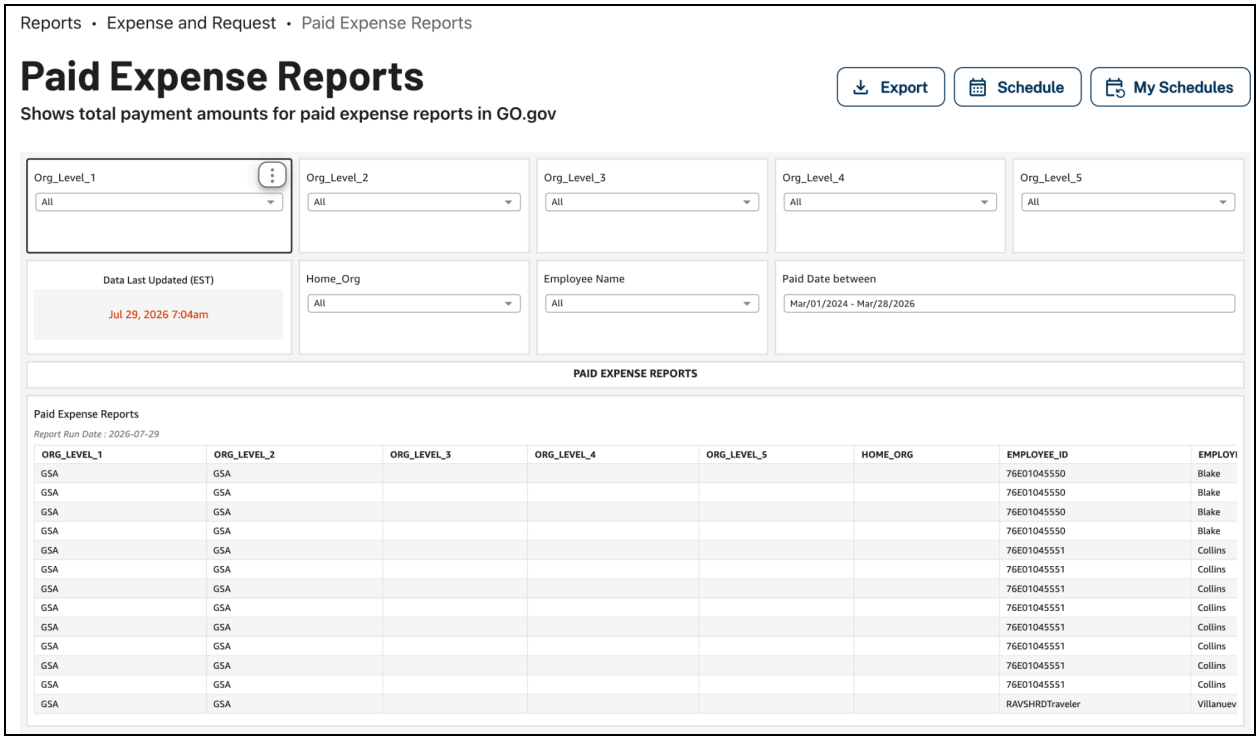
This section equips employees to schedule reports in the GO.gov Reporting Tool. Scheduling reports can create administrative efficiencies and reduce friction when reports need to be run at regular intervals. Key tasks include determining the time a scheduled report should be run, the file format, and any recipients.

Scheduling a Report

1. Log in to GO.gov's Reporting Tool.
2. Access the report you would like to schedule.
3. Select any report prompts, such as Org Level or date.

Note: Prompts will stay the same each time the report runs. Prompts must be set on all tabs for multi-tab reports.

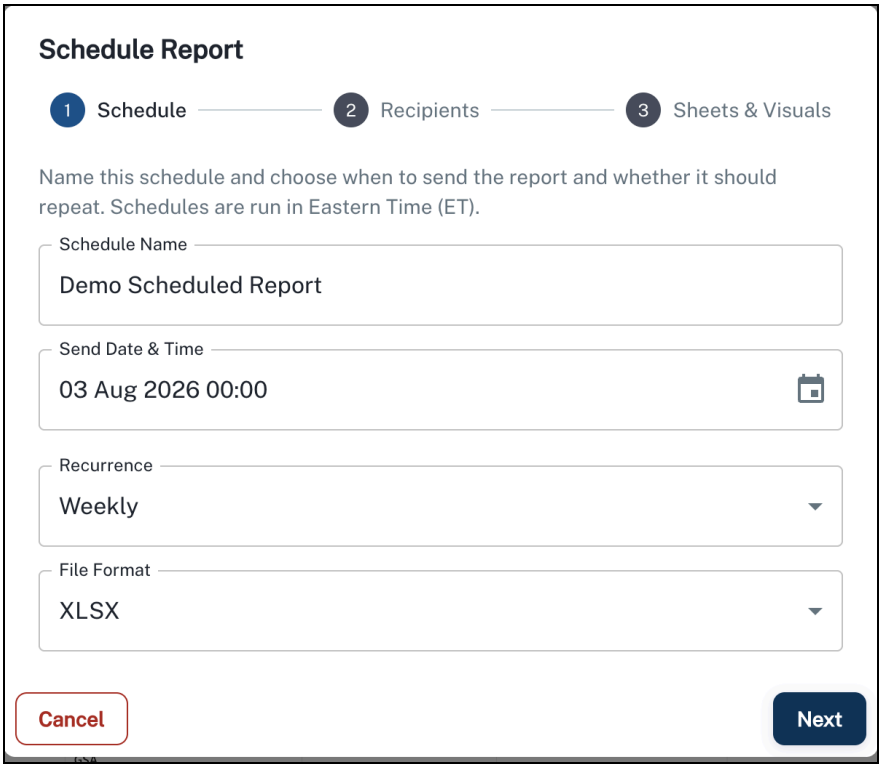
4. Select the **Schedule** button.



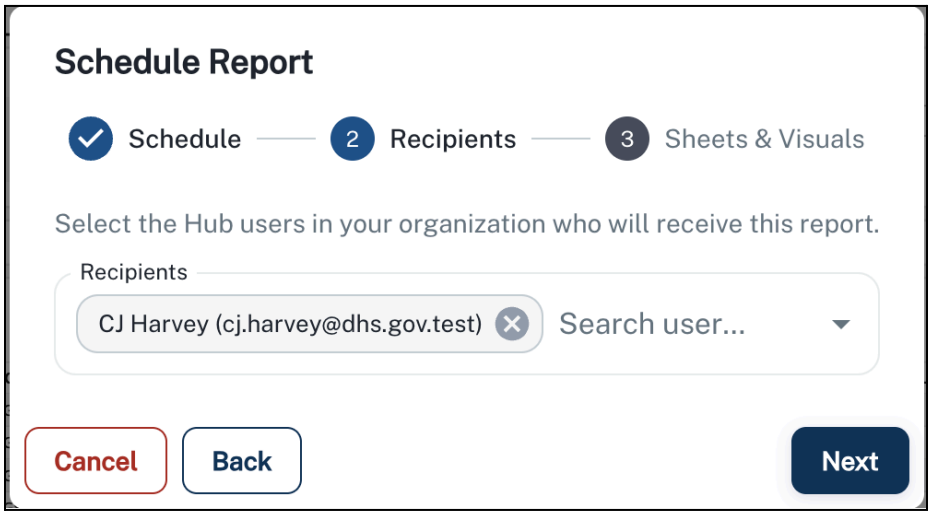
5. Choose and enter a **Schedule Name**.

Note: A meaningful name can help you remember and organize your scheduled reports when you receive links via email.

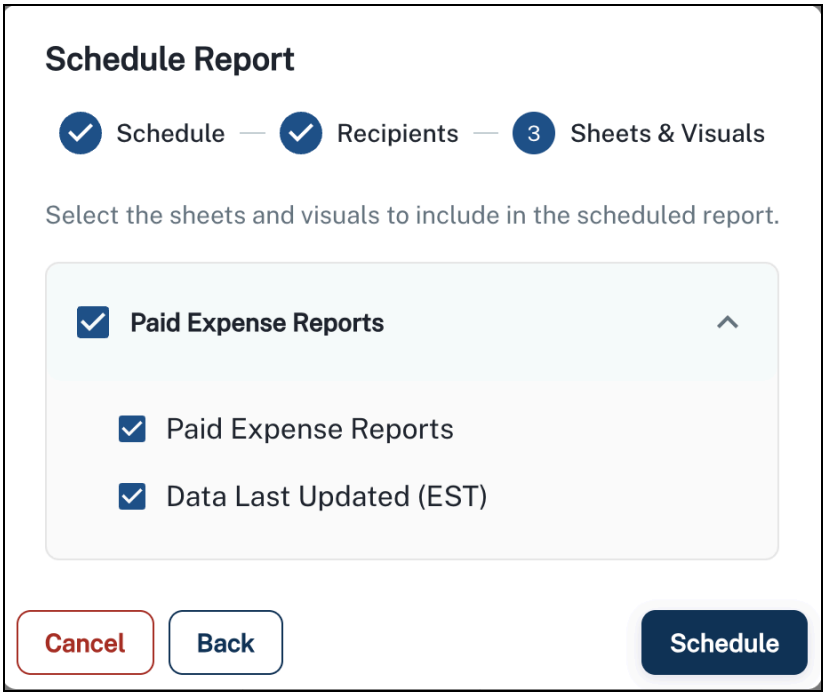
6. Enter a **Send Date & Time**.
7. Use the drop-down menu to select a **Recurrence**.
8. Use the drop-down to select a **File Format**.
9. Select **Next**.



10. Enter the scheduled report **Recipients**.
11. Select **Next**.

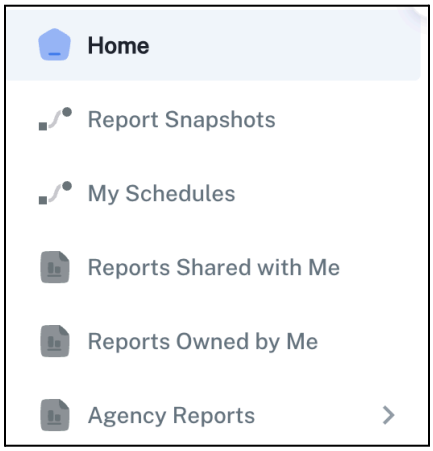


12. Select the tabs that should be included in the scheduled report, if applicable.
13. Select **Schedule**.

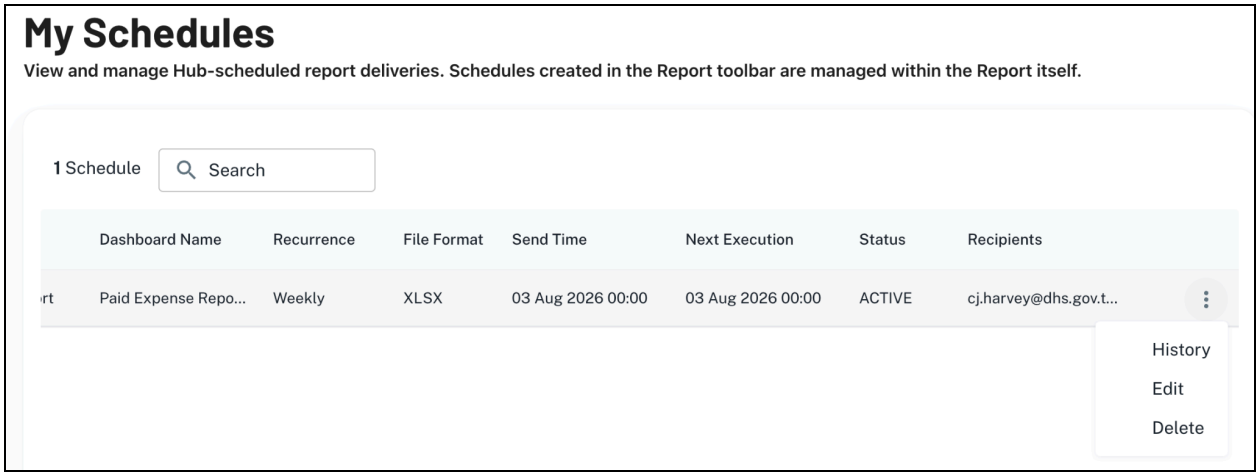


Viewing or Editing a Scheduled Report

1. Select **My Schedules**.



2. Locate the report you wish to edit by selecting the three vertical dots.
3. Select whether to **Edit**, **Delete**, or **See History**.
4. Select **Edit** to change the settings of the report.



5. Select **Close**.

Retrieving a Scheduled Report after Receiving an Email

Note: GO.gov sends a link to any scheduled reports directly to the Reporting Official's email.

1. Open the email containing your scheduled report.
2. Select **View your files**.
3. Log in to the GO.gov Reporting Tool.
4. Select **Download Excel**.