

Creating Group Authorizations

In E2 Solutions (E2), a group authorization (GA) allows you to make a request for two or more travelers to travel to a common destination or on the same itinerary. The GA allows each traveler to depart from (and return to) their own home site. As the document owner, you may also be a traveler, but you are not required to be a member of the group.

See *UG80 – Creating Group Authorizations* for more detailed information on this process.

Process Overview

- Select Create Group Authorization from the Start a Travel Document list on the My E2 At a Glance tab.
- 2. Click **Go**. This displays the Basic Information page.
- 3. Complete each workflow step. Required fields are marked with an asterisk.
- 4. Review the GA on the Summary step.
- 5. When you are satisfied, click **Send to Approver**.

Completing the Basic Information Step

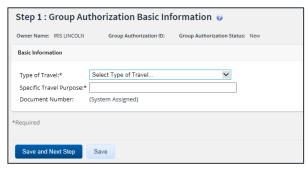


Figure 1: Group Authorization Basic Information page

- 1. Select the **Type of Travel** from the list.
- Enter a Specific Travel Purpose.
- 3. Enter a **Document Number** (if enabled).

4. Click Save and Next Step.

Completing the Site Details Step

This page allows you to provide the travel details for the group.

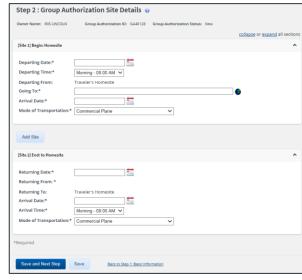


Figure 2: Group Authorization Site Details page

- Complete the required fields in the "Begin" and "End" segments, as well as any other segments you want to add.
 - Enter or select the **Departing Date** and **Departing Time**
 - The Departing From and Returning To fields default to the traveler's home site and cannot be changed.
 - Enter three or more characters of the location name in the Going To field, pause, and then select the location from the suggestion list.
 - Enter or select the Returning Date.
 - Enter or select the Arrival Date (and Arrival Time, if required).
 - Select a Mode of Transportation for both segments.
- 2. Click Save and Next Step.

Completing the Travelers Step

Select the travelers. After the GA is approved, each traveler is notified via email, and a link appears on the To Do List, allowing them to create an authorization from the GA.

The GA requires at least two travelers. You may be a traveler on the GA, but you are not required to be one.

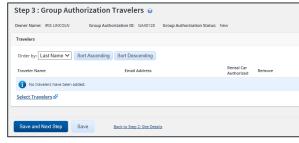


Figure 3: Group Authorization Travelers page

- Click the Select Travelers link.
- 2. Enter your search criteria.
- Click Search.
- 4. Select each traveler to add to the GA.
- 5. Click Save.
- 6. Repeat steps 2–5 until you are finished selecting travelers.
- 7. Click Save and Close.



Figure 4: Group Authorization Travelers — Selected Travelers

8. Select the **Rental Car Authorized** check box to authorize a traveler to book a rental car for the trip. This allows the selected traveler to book a rental car for the trip without requiring the authorization to be routed for approval.

Completing the Expense Details Step

This page allows you to provide an estimate of per traveler expenses, as well as select additional reimbursement types as available to travelers on authorizations created from the GA.

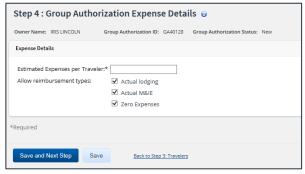


Figure 5: Group Authorization Expense Details page

- Enter the Estimated Expenses per Traveler. If the traveler's authorization exceeds this value, it will be routed for approval.
- Select additional reimbursement types to be available to travelers. The **Per Diem** and **Reduced** reimbursement types are available to travelers by default.
- 3. Click Save and Next Step.

Completing the Accounting Step

If you do not select accounting information, click **Save and Next Step** to move to the next workflow step. If a warning message displays, click **Save and Next Step** again.

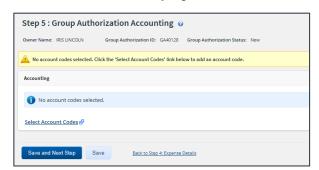


Figure 6: Group Authorization Accounting page

1. Review the accounting information.

- Allocations should total 100% of your voucher expenses.
- Click the Select Account Codes link to select accounts to fund expenses.
- 2. Click Save and Next Step.

Completing the Summary Step

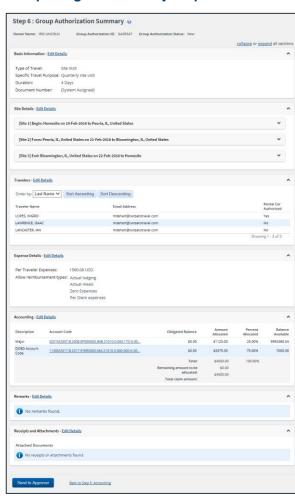


Figure 7: Group Authorization Summary page

- Review the GA for accuracy. Click the Edit Details link in any panel header to return to that workflow step and make changes.
- When you are satisfied, click Send to Approver. This displays a Confirm Action window.
- 3. Click **Confirm**.

You will receive email notifications as the GA moves through the approval process. When it receives final approval, travelers can plan their trips.

Release 20.2 - July 2020

E2 Solutions is a trademark of CWT. All other marks are the property of their respective owners.

© 2020 CWT. All rights reserved.