UG80: Creating Group Authorizations

Planning for Group Travel
Release 21.3 | September 2021

CWT SatoTravel

Table of Contents

1   Introduction

This document contains information regarding the group authorization process for E2 Solutions users utilizing both Federal Travel Regulations (FTR) and Joint Travel Regulations (JTR). Features and options specific to JTR functionality will be indicated when possible. Additionally, many FTR and JTR features and functionality may be subject to your agency's configurations.

2   Understanding Travel Authorizations

In E2 Solutions (E2), an authorization is a request to travel. There are several types of authorizations, outlined in the following table. This user guide covers creating and amending group authorizations (GAs), and creating a trip under a GA.

Authorization Type	Description
Trip-by-Trip	A simple request to travel. This is a one-time request for a specific travel itinerary. Also called "TDY travel."
Open (Blanket) Authorization	An open authorization (often known as a "blanket authorization" or OA) is a preapproved request to travel at a future date. It may be limited to specific time periods, locations, or maximum costs. An open authorization can cover trips for up to one fiscal year.
Trip Under an Open Authorization	After an open authorization is approved, you can create requests to travel under the OA. As long as the individual travel request conforms to all of the properties and limitations of the open authorization, it automatically inherits the approval status of the open authorization and does not require additional approval steps.
Group Authorization	A request for a group of travelers to go to a common destination or itinerary. The group authorization allows each traveler to depart from (and return to) their own home site.
Trip Under a Group Authorization	After the group travel authorization is complete and approved, each traveler is notified that they can create an authorization for travel under the GA. As long as the individual authorization conforms to all of the properties and limitations of the group authorization, it automatically inherits the approval status of the group authorization and does not require additional approval steps.
Dependent Travel	This is a request to travel for a dependent (e.g., spouse, child). Dependent travel requests may be single requests, or may be requests to travel under an open authorization. There are specific restrictions that apply to dependent travel. *NOTE: Dependent travel is a controlled feature and may not be available to all users.*

NOTE: Trips created under a GA are also available for amendment. The process is the same as amending an authorization. (Refer to UG26 – Amending Authorizations *for more information on this process.) GAs have an identifying number that appears in the OA/GA# column of the trips list.*

3   The Workflow Workspace

Each time you create a group authorization, you enter a document workflow. Each page you encounter is a step in the workflow and includes the following items:

- [Left side navigation](#) and links to optional features, functions, and secondary actions
- [Header](#) with general traveler and document information
- [Main area](#), where you enter or select information
- [Buttons and links](#), below the main area, allow you to complete a step
- Dynamic message area, which appears below the header and may include agency- or workgroup-specific information, warnings, and errors
- Help icon (⊙) links to online help for the page or window

3.1   Left Side Navigation

The left side of the page provides links to navigate the main workflow process and to perform other related functions. Left side navigation includes:

- **Workflow steps** – Each step is a link and can be used to go to that place in the workflow, when necessary.
    - Workflows are dynamic – some actions that you take may add additional steps to the workflow.
    - You must complete the first workflow step (i.e., Step 1: Group Authorization Basic Information) before the other workflow steps are enabled.
- **Other Actions** – Links to functions that are not part of the basic workflow. These links only appear if the function is available to you, based on the state of the document and related travel policies. If no actions are available, Other Actions links do not appear on the page.
- **Extras** – Links to additional actions. These links may take you out of the document workflow. Common Extras links include leaving the workflow to view a document list or deleting the current document.

3.2   Document Header Information

The header section is just below the page banner and appears on every workflow page.

Step 1 : Group Authorization Basic Information ⊙

Owner Name: IRIS LINCOLN   Group Authorization ID: Group Authorization Status: New

Figure 1: Group Authorization Basic Information — Page header

For group authorizations, the header always includes:

- The name of the group authorization owner
- GA ID
- Status information

3.3 Main Area

The main area of each page allows you to enter or select the information needed to complete the workflow step.

Figure 2: Group Authorization Accounting — Main area

3.4 Buttons and Links

Buttons and links display at the bottom of the main area. (You may need to scroll to the bottom of the page or window for these buttons to display.) Buttons allows you to save changes and move through the workflow. The primary button is always bold and located on the left; secondary buttons appear to the right of the primary button. **Back to Step** links return you to the previous step in the group authorization workflow process.

TIP: If you have entered information on a page, be sure to save that information before you return to a previous step in the process.

3.5 Dashboards

In E2, group authorizations are a way to pre-plan travel for a group and receive approval before the individual travelers make specific travel plans. Group authorizations are "parent" documents; travelers create individual travel authorizations from the group authorization. These individual authorizations, associated vouchers, and travel advances, in combination with the parent group authorization, represent actual travel plans, activities, and expenses.

When you create a group authorization, you are taken directly into the group authorization workflow. After you have completed the first step in the process, the group authorization is assigned a specific GA ID. The ID is a unique identifier that is used to track the GA, and is also associated with all of the individual traveler trips created under the GA. When you access the group authorization again, a tabbed interface displays — one tab is **GA Dashboard**, while the other is **Group Authorization**. The GA Dashboard provides a way for you to view information and execute actions that may impact not just the parent group authorization, but also the associated travelers' individual documents.

*NOTE: Depending on the status of the document you are accessing, you may be taken directly to the document workflow (i.e., **Group Authorization** tab) or to the dashboard (i.e., **GA Dashboard** tab).*
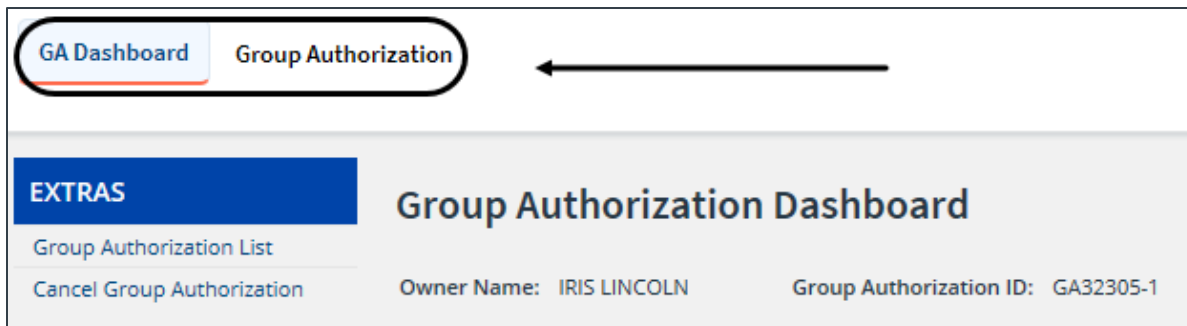
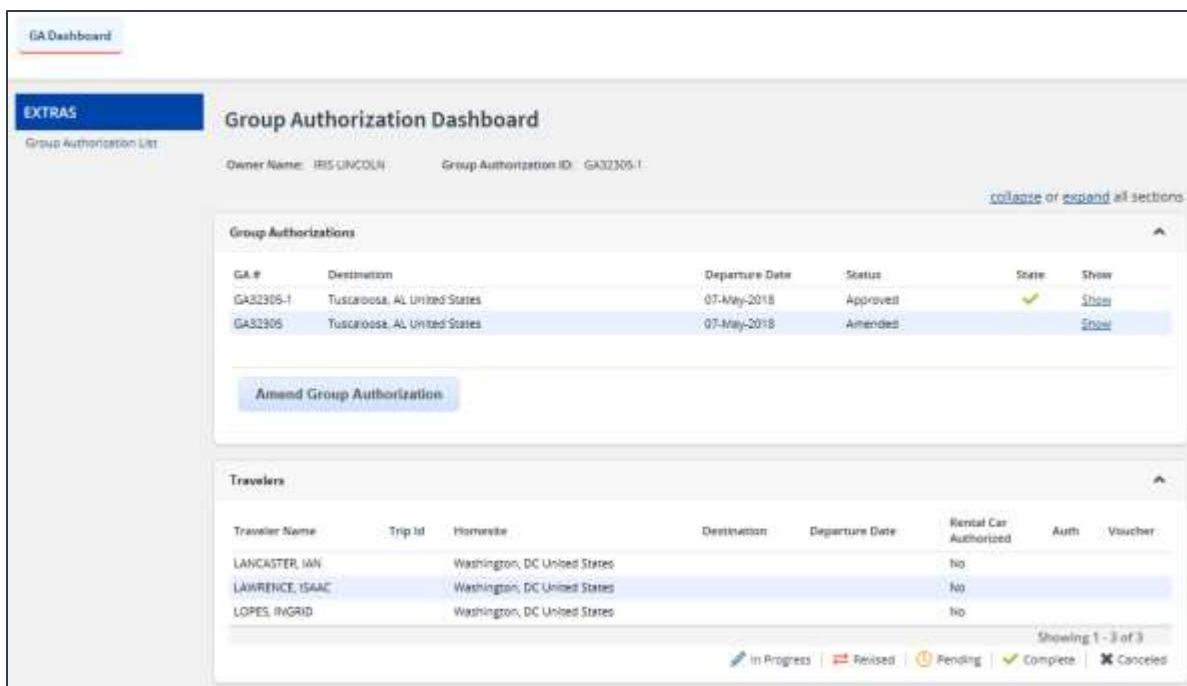*Figure 3: GA Dashboard and Group Authorization tabs*

Figure 4: Group Authorization Dashboard

4   Getting Started

There are two ways to start a group authorization in E2. From your My E2 page:

- Select *Create Group Authorization* from the **Start a Travel Document** list on the **At a Glance** tab.
- Select the **Group Authorization** tab, and then click **Start a New Group Authorization**.

You can also access group authorizations that were previously started but not completed.

- Select the My E2 **Group Authorization** tab, locate the GA on the list, and then click the **Show** link.
- From the My E2 **At a Glance** tab, click the link to the GA in the To Do List. Depending on the number of documents requiring your attention, however, this link may not always be available.

5   Completing the Basic Information Step

The Basic Information step is the first step in the group authorization workflow. This page requires you to enter the basic information required for the group authorization, including:

- Type of travel
- Travel purpose
- Document number

From the My E2 **At a Glance** tab, complete the following steps.

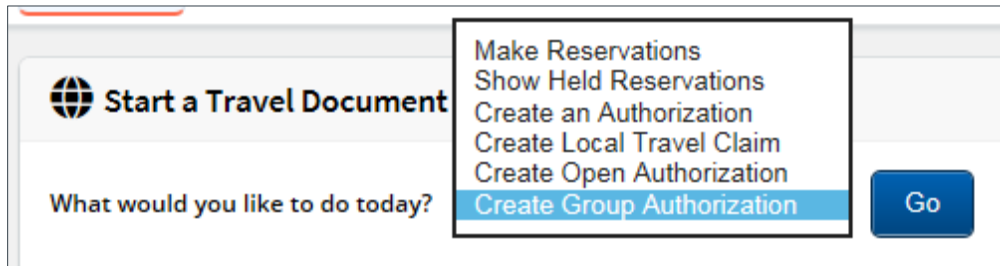1. Select *Create Group Authorization* from the **Start a Travel Document** list.

Figure 5: Start a Travel Document — Create Group Authorization option

2. Click **Go**. This displays the Group Authorization Basic Information page.

Figure 6: Group Authorization Basic Information page

3. Enter the required information.
   a. Select the type of travel for which you are creating the group authorization from the **Type of Travel** drop-down list.

   *NOTE: The options available in the **Type of Travel** drop-down list reflect your agency's travel policy. If the option you need is not available, contact your travel policy manager for clarification and assistance.*

b. Enter the purpose of the trip in the **Specific Travel Purpose** field.
c. If enabled, enter the GA's document number in the **Document Number** field.
   - If the field displays *(System Assigned)* and is disabled, E2 automatically assigns a document number.
   - Adding a manual document number is an optional feature that may not be available to you. Even if this field is enabled, you may not need to add the information. Consult your workgroup's travel policies for appropriate actions.
4. Click **Save and Next Step** to save your changes and move to the next step in the GA workflow, or click **Save** to save your changes and remain on the Group Authorization Basic Information page.

   TIP: If you navigate away from the Group Authorization Basic Information page before you save your changes, the group authorization is not created or assigned a GA ID, and your input is lost.

6   Completing the Site Details Step

The Site Details page for a group authorization is very similar to the Site Details page for a standard authorization. Use this page to provide travel details for the group; these details become part of the limitations for group authorization travelers. Authorizations created under the group authorization must conform to the GA specifications to inherit the approval status of the group authorization. If they do not conform to the limitations, they are routed for individual approval.

Figure 7: Group Authorization Site Details page

Complete the following steps.

1. Enter the requested information in the "Begin" section.
   a. **Departing Date** – Enter the group's date of departure in the field (formatted DD-MMM-YYYY), or click the calendar icon to select the date from the drop-down calendar. Travelers must begin travel within one day of this date.

> ***NOTE***: *If you enter the date in another format, E2 will convert it to the appropriate format, if possible.*

    b. **Departing Time** – Select the time the group will be leaving from the drop-down list.

    c. **Departing From** – This field defaults to *Traveler's Homesite* and cannot be changed. When the traveler creates an authorization under this GA, they may have the option of selecting a different departure site, if their travel policy supports that capability.

    d. **Going To** – Enter three or more characters from the name of the location to which the group is traveling, pause, and then select the city from the drop-down list. You can also click the globe icon (🌐) to select the city.

    e. **Arrival Date** – Enter the group's anticipated date of arrival at the "going to" location in the field, or click the calendar icon to select the date from the drop-down calendar.

    f. **Mode of Transportation** – Select the mode of transportation to be used by the group when traveling between the "departing from" and "going to" locations from the drop-down list. The field defaults to *Commercial Plane*.

2. Enter the requested information in the "End" section.

    a. **Returning Date** – Enter the date the group will be returning in the field, or click the calendar icon to select the date from the drop-down calendar. Travelers must end travel within one day of this date.

    b. **Returning To** – This field defaults to *Traveler's Homesite* and cannot be changed. When the traveler creates an authorization under this GA, they may have the option of selecting a different return site, if their travel policy supports that capability.

    c. **Arrival Date** – Enter the group's anticipated date of arrival at the "returning to" location in the field, or click the calendar icon to select the date from the drop-down calendar.

    d. **Arrival Time** – Select the time you will be arriving from the drop-down list.

    e. **Mode of Transportation** – Select the mode of transportation to be used for the group's return from the drop-down list.

3. Click **Add Site** between segments to add additional destinations to the group's travel plans.

4. Click **Save and Next Step**.

6.1   Search Location

The Search Location window displays when you click the globe icon (🌐). Use it to search for locations (i.e., per diem sites). Complete the following steps.

1. Select the location's country from the **Country** drop-down list.
2. If you selected *United States* in the **Country** field, select the location's state from the **State** drop-down list.
3. Enter all or part of the location's name in the **Site** field.
4. Verify the date shown in the **Rate valid on** field is correct. If necessary, you can enter a date in the field, or click the calendar icon to select a date from the drop-down list.
5. Click **Search**. The window displays a list of sites matching your search criteria.

> ***TIP***: *Results are limited to 100 items. To narrow the search, enter additional characters in the **Site** field, and then click **Search** again.*

6. Click the radio button next to the site you want to select.
7. Click **Save and Close** to select that site and return to the Site Details page.

6.1.1   Standard Rate or County, Other, Foreign Areas, or Non-Foreign Areas

If you cannot find the correct per diem location, select one of the following options (at the bottom of the Search Location window).

- Standard Rate or County (for a location in the United States)
- Other
- Foreign Areas or Non-Foreign Areas (for a foreign location)

These options cause a **City Name** field to display on the Site Details page. Enter the actual travel destination in the appropriate **City Name** field (*Departing From* or *Going To*) that displays below the per diem location field. Do not include the state or country information in a **City Name** field; enter only the location name.

6.2 Add a Site

Under certain circumstances, you may want or need to add an additional site to the group's travel plans. Complete the following steps.

1. Click **Add Site**, which adds a site between your beginning and ending destinations.
2. Verify or change the existing information.
   a. **Departing Date** – Enter the date of the group's departure for the new site in the field, or click the calendar icon to select a date from the drop-down calendar. The field defaults to the "Begin" departure date plus one day, or the departure date plus one day for any site added prior to the new site.
   b. **Departing Time** – Select the time the group plans to depart for the new site from the drop-down list.
   c. **Departing From** – This field is read only and defaults to the previous destination.
   d. **Going To** – Enter three or more characters for the name of the new location to which the group is traveling, pause, and then select the new city from the drop-down list.
   e. **Arrival Date** – Enter the date you plan to arrive at the new site in the field, or click the calendar icon to select a date from the drop-down calendar. The field defaults to the previous site's departure date plus one day.
   f. **Mode of Transportation** – Select the mode of transportation to be used by the group to travel to the new site from the drop-down list. The field defaults to *Commercial Plane*.
3. Click **Save** to save your entries.

Figure 8: Group Authorization Site Details — Multiple destinations

7   Completing the Travelers Step

This step allows you to select the travelers that will be part of the group. When the group authorization is approved, each traveler will be notified via email, and may see a To Do List item to create a travel authorization for the GA.

A group authorization must include at least two travelers. As owner of the group authorization, you may also be a traveler within the group, but this is not required.

Figure 9: Group Authorization Travelers page

Complete the following steps.

1. Click the **Select Travelers** link. This displays the Traveler Selection window.

Figure 10: Traveler Selection window

2. Enter at least one character in any of the available fields.
3. Click **Search**. A list of users matching your search criteria displays below the Search for Traveler panel.
   - You are limited to travelers within your office or workgroup.
   - You may be a traveler on the group authorization, but it is not required.

Figure 11: Traveler Selection — Search results

4. Click the **Select** check box to the left of each traveler you want to include on the group authorization.
5. Click **Save**. The Group Authorization Travelers page is updated with your selections.
6. Repeat steps 2–5 until you have selected all travelers for the GA.
7. Click **Save and Close** to save your selections, close the Traveler Selection window, and return to the Group Authorization Travelers page. The page now includes a list of all selected travelers.

Figure 12: Group Authorization Travelers — Selected travelers

8. Review the list and make changes, if needed.
   - [Authorize a rental car](#) for one or more travelers.
   - [Remove a traveler](#) from the list.
9. Click **Save and Next Step**.

7.1   Authorizing Rental Cars

You can authorize one or more travelers on the group authorization to book a rental car for the trip. Only travelers who are authorized to book a rental car can add a rental car reservation to their authorization, without requiring the authorization be routed for individual approval. Travelers who are not authorized to book a rental car are not prevented from making the rental car reservation, but this action will cause the authorization created from the GA to be routed for approval.

Select the **Rental Car Authorized** check box for each traveler authorized to book a rental car.

7.2   Removing Travelers

Click a **Remove** link to remove the corresponding traveler from the list and the group authorization. This displays a Confirm Action window. Click **Confirm** to confirm your action and remove the traveler.

8   Completing the Expenses Step

Use the Group Authorization Expense Details page to provide an estimate of expenses per traveler. Any trips created from the GA that exceed the estimated expense threshold will be routed for approval.

You can also select additional reimbursement types that will be available to the travelers for the trips created from the GA. The *Per Diem* and *Reduced* reimbursement types are always available; the options available for selection are controlled by your travel policy and may include:

- Actual lodging
- Actual M&IE
- Zero expenses

Step 4 : Group Authorization Expense Details ❷

Owner Name: IRIS LINCOLN   Group Authorization ID: GA40128   Group Authorization Status: New

Expense Details

Estimated Expenses per Traveler:* [   ]

Allow reimbursement types: ☑ Actual lodging
                                  ☑ Actual M&IE
                                  ☑ Zero Expenses

*Required

[Save and Next Step]   [Save]   Back to Step 3: Travelers

Figure 13: Group Authorization Expense Details page

Complete the following steps.

1. Enter the maximum amount of estimated expenses allowed per traveler in the **Estimated Expenses per Traveler** field. If a traveler's trip exceeds this limitation, that authorization will be routed for approval.
2. The *Per Diem* and *Reduced* reimbursement types are available to travelers by default. Use the **Allow reimbursement types** check boxes to select the additional reimbursement types available for trips created from the GA.
3. Click **Save and Next Step**.

9   Completing the Accounting Step

This step allows you to allocate funds to cover the total estimated expenses for all trips created from the GA. Depending on your workgroup's travel policies, you may have a limited or fixed set of accounts available to you, or you may be allowed to search for a specific account.

TIP: Accounting information is required before final document approval. In some cases, approvers allocate funds; travelers and arrangers are not allowed to perform this task. If the buttons and links described in the following procedures are not available to you, or if you have other questions about how to select funding for the group authorization, contact your travel policy manager for assistance.
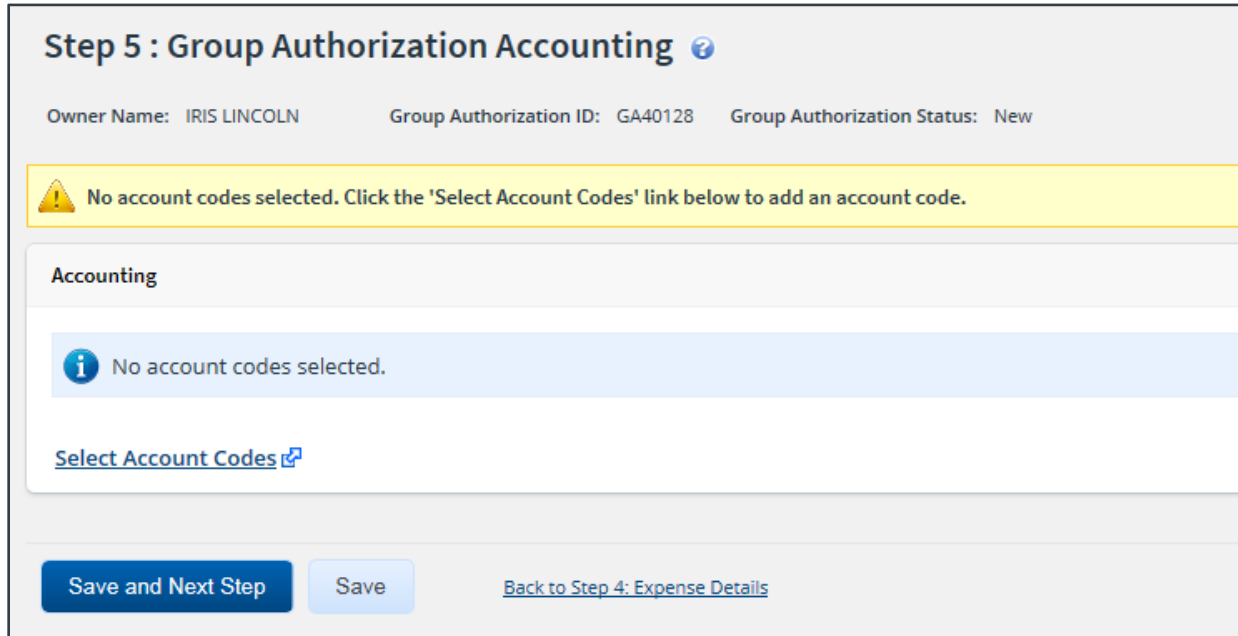

Figure 14: Group Authorization Accounting page

Complete the following steps.

1. Click the **Select Account Codes** link to find new accounts to fund the GA or select accounts from favorites.
2. Review your selections.
   - Click an **Account Code** link to view segment details for the selected account code. (Click **Exit Window** to close the segment details window.)
   - If you need to adjust allocations between multiple accounts, enter the appropriate amounts in the **Amount Allocated** or **Percent Allocated** field for each account.
   - Click an **Add** link to save the corresponding account as a favorite.
   - Click a **Delete** link to remove the corresponding account from the group authorization.
3. When funding selections are correct and total 100% of your estimated GA expenses, click **Save and Next Step**.

9.1   Select Account Codes from a Favorites List

Complete the following steps to select account codes for the GA that have been saved to a favorites list.

1. Click the **Select Account Codes** link. This displays the Account Code Selection window.

*NOTE: If favorites are available to you, the window defaults to the **Select Account Codes** tab. This tab displays any time favorite accounts are available, even if you do not have a personal favorites list within your profile.*
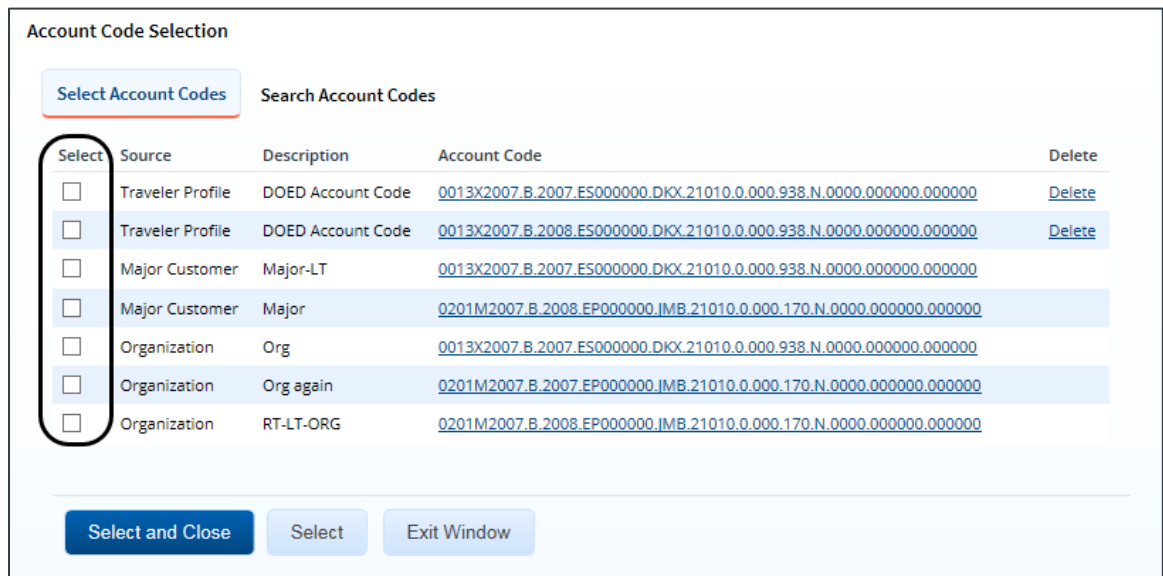

Figure 15: Account Code Selection — Select Account Codes tab

2. Click the **Select** check box to the left of each code you want to use to fund the group authorization.
3. Click **Select and Close** to save your selection(s), close the Account Code Selection window, and return to the Group Authorization Accounting page.

9.1.1   Add a Favorite Account

You can add standard account codes to a favorites list while assigning account codes to a GA. These favorites are then readily available when you create your group authorization. If a code is not added as a favorite, you have to search for it each time you want to use it.

NOTE: The ability to add accounting codes to a favorites list is a controlled feature and may not be available to all users. Contact your travel policy manager if you require additional assistance with accounting codes.

From the Group Authorization Accounting page, complete the following steps to add an account code to your favorites list.

1. Locate the account code in the list displayed on the page.
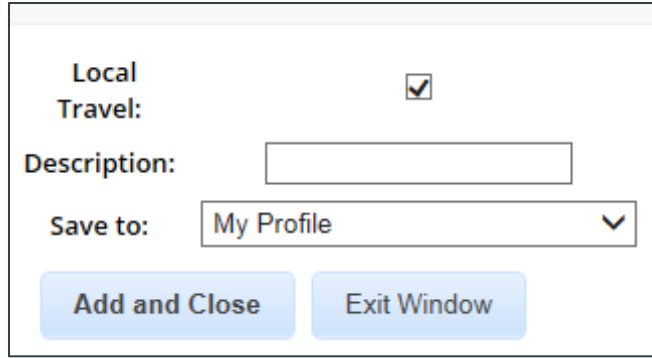2. Click the **Add** link. This displays the Add to Favorites window.

Figure 16: Accounting — Add to Favorites window

3. Select the **Local Travel** check box to make the account available as a favorite for local travel claims.
4. Enter a name for the favorite in the **Description** field. This description displays with the actual account code, making it easy for you or others to choose the right account.
5. Select the level at which you want to share the favorite from the **Save to** drop-down list.
    - If you select *My Profile*, the account code is added to your personal favorites and is only available to you or your travel arranger.
    - If you are allowed to share the favorite with other users in your office or workgroup, select the appropriate group from the drop-down list.
6. Click **Add and Close** to add the account code to your favorites and close the window.

9.2   Search for Account Codes

Complete the following steps to search for specific account codes.

1. Click the **Select Account Codes** link. This displays the Account Code Selection window.
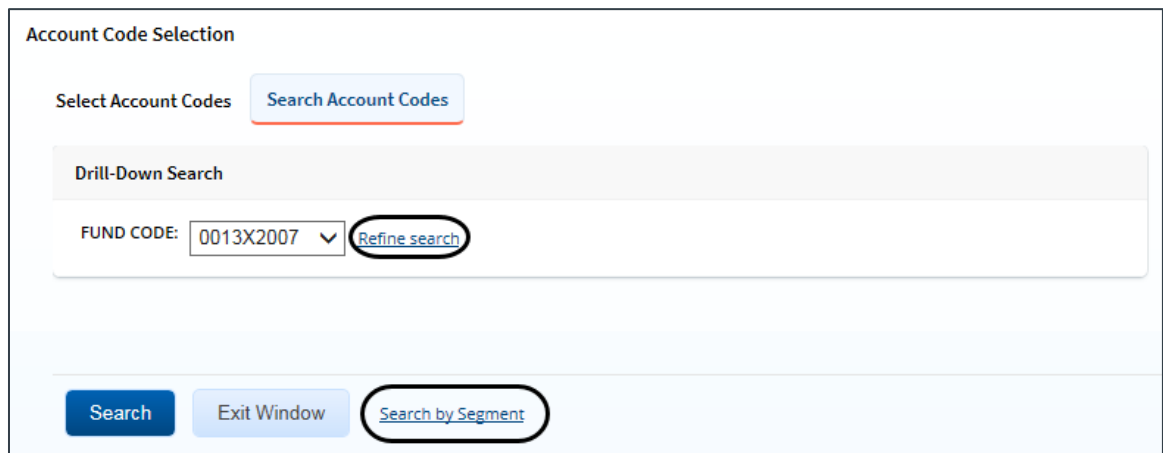2. Click the **Search Account Codes** tab.

Figure 17: Account Code Selection — Search Account Codes tab

3. Locate the account code.
    - **Drill-down method** (default) – This option allows you to search for account codes by drilling down through the segments of each code.
        i.   Select a value from the drop-down list.
        ii.   Click the **Refine search** link. A list displays for the next segment.

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        iii.   Repeat steps i–ii until you have selected the necessary search criteria.

        iv.   Click **Search** to display the list of account codes matching your search criteria.

- **Segment method** – This option allows you to search for a segment with specific information, such as a department, program, or funding year.
  - i. Click the **Search by Segment** link.
  - ii. Enter the segment information to use as search criteria in the appropriate field(s).
  - iii. Click **Search** to display the list of account codes matching your search criteria.

4. Click the **Select** check box to the left of each code you want to use to fund the group authorization.
5. Click **Select and Close** to save your selection(s), close the Account Code Selection window, and return to the Group Authorization Accounting page.

9.3 Add a Dimensional Account Code

Complete the following steps to add a dimensional account code to the group authorization.

1. Click the **Select Account Codes** link. This displays the Account Code Selection window.
2. Click the **Add Account Codes** tab.

Figure 18: Account Code Selection — Add Account Codes tab

3. Enter segment values in each field, or click the **Search** button next to a field to select from a list of values in the Dimensional Accounting Code Search window. You can also enter one or more characters of the segment value or description in a field, and then click **Search** to limit the list to segment values and descriptions that start with the entered data.

   TIP: To see information about a segment, including the maximum length, float the pointer over the segment field to view the associated hover text.
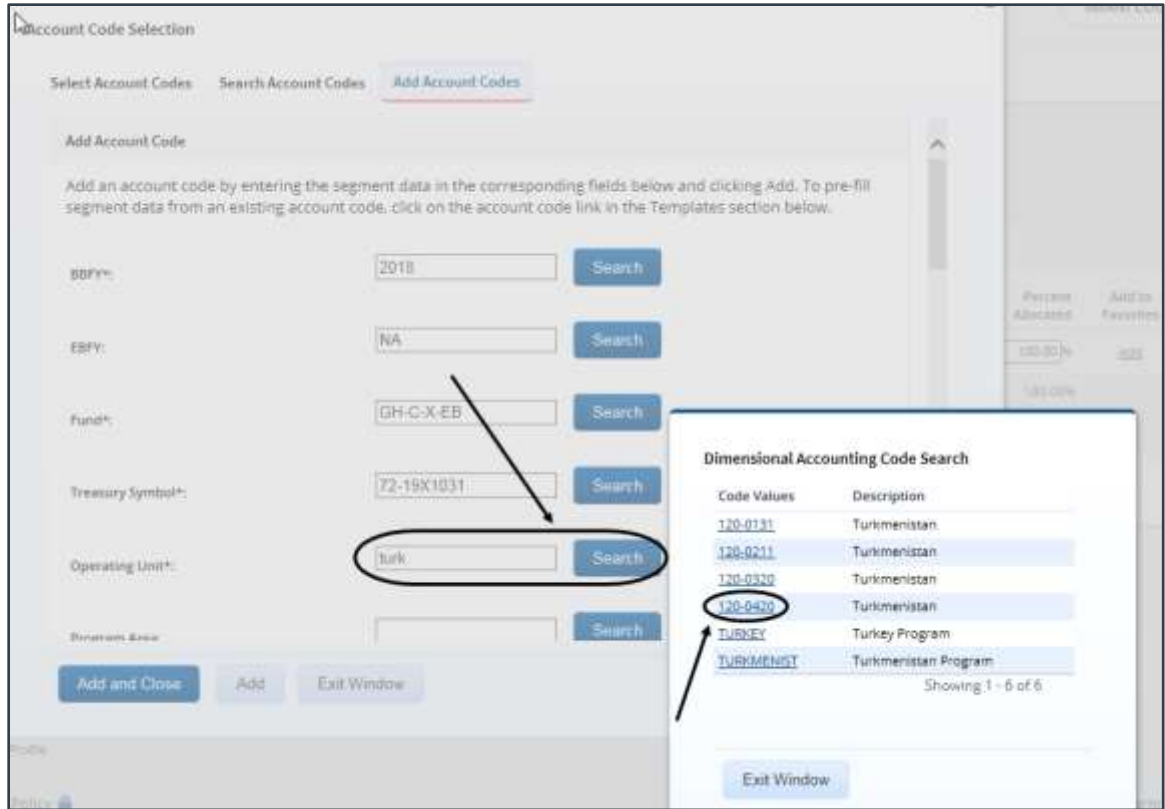
Figure 19: Dimensional Accounting Code Search

4. Click **Add and Close** to add the newly created dimensional account code to the group authorization, close the Account Code Selection window, and return to the Group Authorization Accounting page.

9.3.1 Accounting Code Templates

Account code templates allow you to prepopulate all or part of a dimensional account code, and then alter or add segment values as needed. Any account code already associated with the group authorization appears in the Trip Accounting Code Templates section on the **Add Account Codes** tab of the Account Code Selection window. Favorite account codes are listed in the Favorite Accounting Code Templates section.

Select a template from either section, and then scroll to the top of the tab to enter or search for the remaining segment values.

Figure 20: Account Code Selection — Accounting Code Templates

10 Completing the Summary Step

The Group Authorization Summary page allows you to review the group authorization and make sure it is correct before you submit it for approval.

Figure 21: Group Authorization Summary page

Complete the following steps to submit the GA for approval.

1. Review the information in each section. If you need to make changes, click the **Edit Details** link in the section header to return to that workflow step.
2. When you are finished, scroll to the bottom of the page and click **Send to Approver**. This displays a Confirm Action window.
3. Click **Confirm**.

11 Other Actions Available

The Other Actions section on the left side of E2 provides links to actions that are commonly performed while creating a group authorization, including:

- Adding remarks
- Attaching documentation
- Printing the group authorization
- Viewing document history
- Viewing the approval routing path
- Viewing routing history

11.1 Add Remarks

You can add remarks to the group authorization. Remarks may be used to explain a selection, or provide additional information to others who have access to the document, such as approvers, auditors, or administrators. Complete the following steps to add remarks to the group authorization.

1. Click the **Remarks** link in the Other Actions section. This displays the Remarks window.
2. Click the **Add Remarks** tab.

Figure 22: Remarks — Add Remarks tab for a group authorization

3. Enter your remarks and review them. Remarks cannot be edited or deleted after you save them; make any changes before saving.

   TIP: Avoid copying and pasting text from other applications. Doing so may result in invalid character errors.

4. Click **Save and Close** to save your remarks and close the Remarks window.

11.2 Attach Documentation

In some cases, you may want to attach supporting documentation to your travel request. E2 allows you to upload or fax documents and attach them to the group authorization. These documents will remain attached to the GA, and can be accessed and viewed by approvers and auditors.

Complete the following steps.

1. Click the **Attachments** link in the Other Actions section. This displays the Group Authorization Attachments window. The maximum file size and allowed file type information display below the **Add Attachment** link.

Group Authorization Attachments

Add New Attachment

Add Attachment
Size Limit: 10 Megabytes - Allowed Types:
PDF,JPG,JPEG,GIF,TIFF,TIF,PNG,BMP,XLS,XLSX,DOC,DOCX,TXT

File Name	Date Attached	Attached By	Show	Delete

Exit Window   Attach Fax

Figure 23: Group Authorization Attachments window

2. Click the **Add Attachment** link. This displays the system Choose File window.
3. Select the PDF file you want to attach to the group authorization.
4. Click **Open**. You are returned to the Group Authorization Attachments window. A success message displays when the document is attached, and the new document appears in the list.
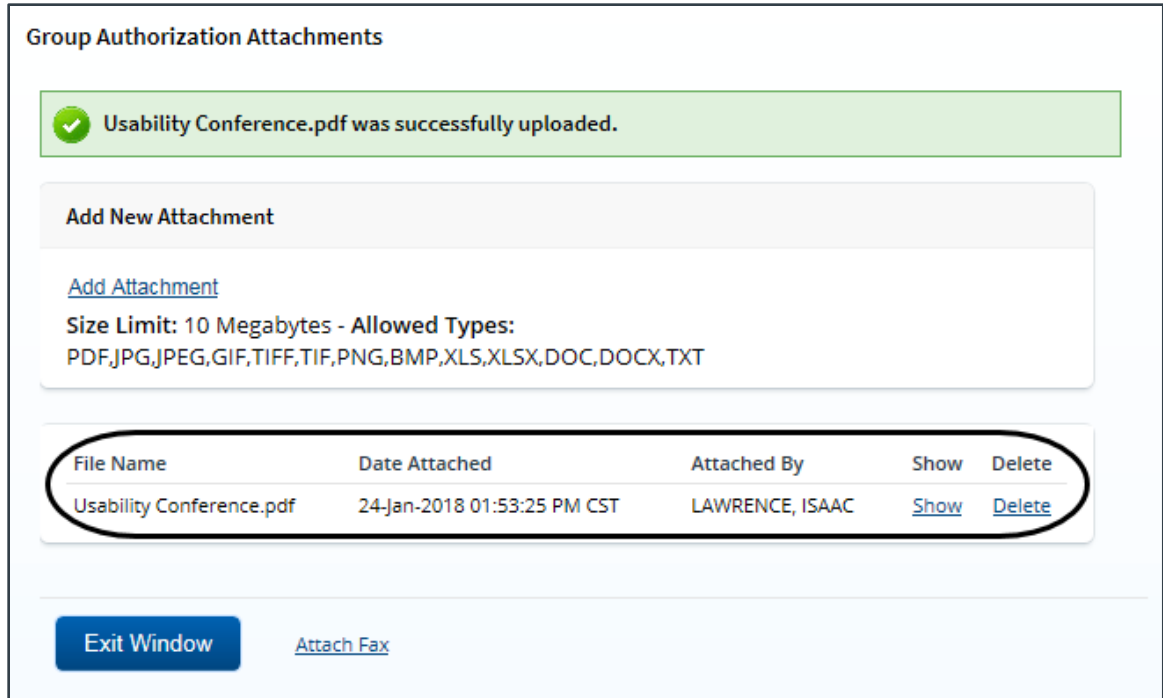
Figure 24: Group Authorization Attachments — Attached Document

5. Click the **Show** link to view the document.

    *TIP: If this is not the document you want attached to the group authorization, click **Delete** to remove the file. You are able to delete attached files at any time prior to final approval, as long as you have edit privileges for the document. Adding and deleting receipts will add entries to the history file.*

6. Click **Exit Window**.

11.2.1   Attaching a Document via Fax

If you have paper documents, you can attach them to the group authorization via fax, if that capability is available to you. Complete the following steps.

1. Click the **Attachments** link in the Other Actions section. This displays the Group Authorization Attachments window.
2. Click the **Attach Fax** link, which opens the Fax Attachment(s) section in the window.
3. Click the **Print the Fax Cover Page** link. This displays a printable version of the cover sheet. The fax cover page includes a special bar code that associates the fax with the group authorization and includes the phone number to use; the fax cover page must be the first page of your fax.
4. Click **Print This Page**.
5. Fax the cover page, along with the documents you want to attach to the group authorization, to the number shown on your fax cover page. The fax will automatically be added to the list of attached documents within 30 minutes of receipt.

    NOTE: Adding an attachment via fax will add an entry to the history file.

11.3 Print the Group Authorization

Complete the following steps to review the printable version of the group authorization.

1. Click the **Printable Group Authorization** link in the Other Actions section. The group authorization appears as a PDF file in a new browser window.

2. Click the **Print** icon ( ) to print the document.

    *TIP: Under certain circumstances, the document may appear as an HTML file with a **Print** button. If this occurs, click **Print** to print the group authorization.*

Official Group Authorization

24-Jan-2018

PRIVACY ACT NOTICE: The following information is provided to comply with the Privacy Act of 1974(P.S. 93-579). The information requested on the form is required under the provisions of 5 U.S.C. Chapter 57(as amended), Executive Orders 11609 of July 22, 1971, and 1102 of March 27, 1962, for the purpose of facilitating authorization action and the request for advance of funds for travel and other expenses to be incurred under administrative. The information contained in this form will be used by the Federal agency officers and employees who have a need for such information in the performance of their duties. Information will be transferred to appropriate Federal, State, local, or foreign agencies when relevant to civil, criminal or regulatory investigations, or prosecutions. Failure to provide the information required will result in delay or suspension of the processing of this form.

Document Number: 35547G			
Owner name **LINCOLN, IRIS**	Status **Revised**		Group Authorization Id **GA35547**
Arrive **19-Feb-2018**			Depart **22-Feb-2018**
Destination **Peoria, IL United States**			Estimated Expense per Traveler **1500.00 USD**
Authorized Travelers **LAWRENCE, ISAAC** **LOPES, INGRID (R)** **LANCASTER, IAN** "R" Indicates Rental Car Authorized			Purpose of Travel **Quarterly site visit**
Reimbursement Type Allowed **Actual lodging** **Actual meals** **Zero Expenses**			Approving Official
Accounting Codes 0201M2007.B.2008.EP000000.JMB.21010.0.000.170.N.0000.000000.000000 1100M2017.B.2017.EYER0000.664.21010.0.000.000.N.0000.000000.000000			
Remarks:			

Figure 25: Printable Group Authorization

11.4 View Group Authorization History

Click the **View History** link in the Other Actions section to display the Group Authorization History page. This page allows you to view an audit trail of actions taken on the group authorization, including the date

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and time of the event, actions take on the document, document status, and user who performed the action.

Figure 26: Group Authorization History page

11.5 View the Approval Routing Path

When a group authorization has been submitted for approval, the status of the document changes to *Pending Authorization Approval*, and it is sent on a specific path that may include multiple approval steps, triggered by a set of rules that are applied to the GA. Click the **View Routing Path** link in the Other Actions section to display the View Routing Path page, which allows you to view the routing path for the group authorization and, if allowed, make minor changes.

The View Routing Path page lists all of the steps in the approval path for the group authorization, and includes the following information:

- **Step** – The number of the step in the path.
- **Approver Pool** – The name of the approver group assigned to the step. The person who approves the group authorization is a member of this approver group.
- **Approval Reason** – The rule that triggered the approval step.
- **Action** – The action to be taken. Some steps are informational only, while others require an approval.
- **Reserved By** – The name of the approver who is currently responsible for completing this step.

Figure 27: View Routing Path — Group Authorization

11.5.1 Change the Approver

If the group authorization has a status of *Pending Approval*, you can change the approver responsible for the current step. The **Pool Members** drop-down list displays all members of the approver group associated with the approval step. For example, if the current approver is unavailable, you can select another approver from the same group to handle the GA.

Complete the following steps to change the approver.

1. Click the **View Routing Path** link in the Other Actions section. This displays the View Routing Path page.
2. Select the new approver from the **Pool Members** drop-down list.
3. Click **Save** to save your changes.

11.6 View Routing History

Click the **View Routing History** link in the Other Actions section to display the View Routing History page. This page provides a log of approval routing events for the group authorization, including date and time of the event, action that triggered the event, and event details.

Owner Name: IRIS LINCOLN   **Group Authorization ID:** GA35547   **Group Authorization Status:** Revised

Routing History

Date	Action	Routing History Details
24-Jan-2018 11:56:34	Submitted for Approval	Pool DOED MDEHART POOL added for rule All Group Authorizations.
24-Jan-2018 11:56:34	Submitted for Approval	Pool DOED MDEHART POOL2 added for rule All Group Authorizations.
24-Jan-2018 11:56:34	Submitted for Approval	Pool DOED MDEHART POOL3 added for rule All Group Authorizations.
24-Jan-2018 13:10:29	Recalled	By Approver IRIS LINCOLN

Departure dates and times are shown in local time for departure location. Expiration dates and times are shown in Central Time.

Figure 28: View Routing History — Group Authorization

12 Extras

The Extras section on the left side of every workflow page contains links to additional functions that you may need to perform, but that may take you out of the document workflow. Extras actions include:

- Displaying the Group Authorization list
- Deleting the group authorization

TIP: *Always save any change you have made before you click an Extras link.*

12.1 Group Authorization List

Click the **Group Authorization List** link in the Extras section to go to the My E2 **Group Authorization** tab.

Figure 29: My E2 — Group Authorization tab

12.2 Delete the Group Authorization

Plans change. E2 helps you manage those changing plans by allowing you to delete a GA.

- You can only delete a GA that has not been submitted for approval. If the GA has been approved, it cannot be deleted; it must be canceled.
- If your GA has a status of *Pending Approval* and you want to delete it, ask the approver to return the document to you. When the GA has been returned to you for revision, you can delete it.

The **Delete Group Authorization** link is available at any point in the group authorization process, after completing the Basic Information page but before submitting the group authorization for approval. Complete the following steps.

1. Click the **Delete Group Authorization** link in the Extras section. This displays a Confirm Action window asking you to confirm whether you want to delete the GA.
2. Click **Confirm**. The OA is removed from the system, and a success message displays to confirm the GA was successfully deleted.

13   Recalling a GA from the Approval Process

If you need to change a group authorization after you submit it for approval, but before it completes the approval process, you can recall the document. Recalling a document removes it from the approval process and changes the document's status from *Pending Approval* to *Revised*. (You can recall a group authorization that is pending approval at any time until it receives final approval.) You can make your changes and then resubmit the GA for approval.

Complete the following steps.

1. Locate the group authorization on the My E2 **Group Authorization** tab.
2. Click the **Show** link. If the Group Authorization Summary page for the correct version of the GA displays, skip to step 6.
3. Click the **GA Dashboard** tab.
4. Locate the GA in the Group Authorizations section of the GA Dashboard.
5. Click the **Show** link. This displays the Group Authorization Summary page for the GA.
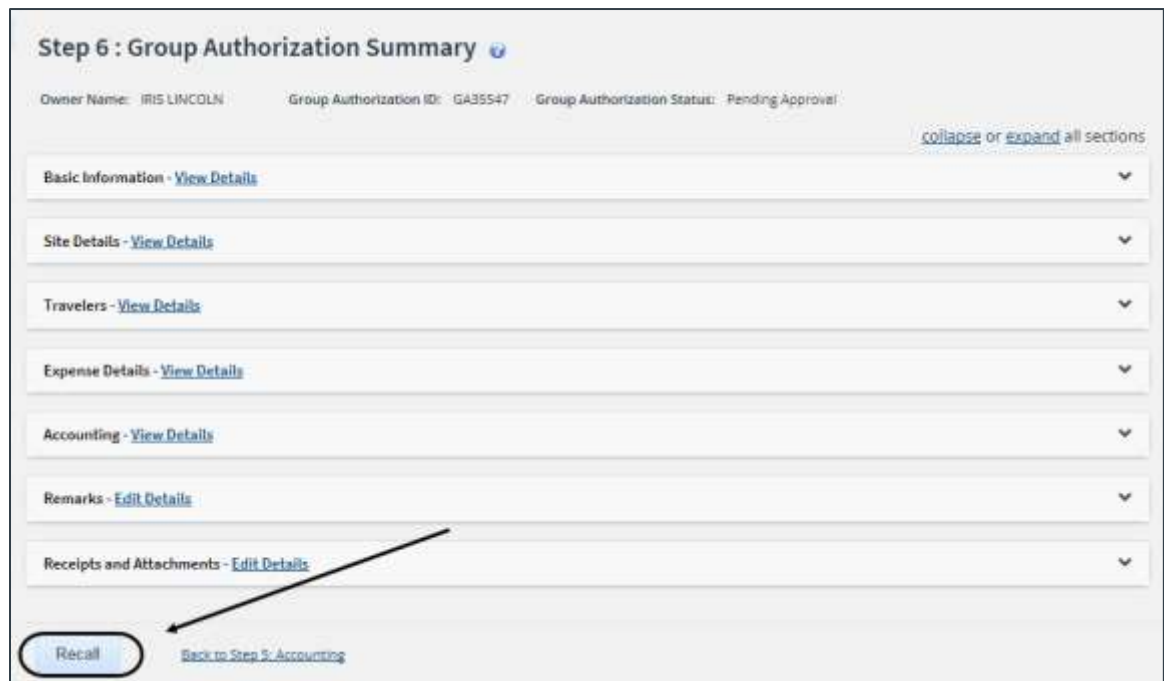

Figure 30: Group Authorization Summary — Recall button

6. Click **Recall**. This displays a Confirm Action window.
7. Click **Confirm**. The status of the document changes to *Revised*.
8. Make your changes and then resubmit the group authorization for approval.

14   Canceling a Group Authorization

If all trips created from a group authorization have a status of *New*, *Revised*, or *Pending Approval*, you can cancel the GA after it has been approved. If authorizations created from the GA have already been approved, you may still be able to cancel the GA. All travelers with approved authorizations from the GA, however, must cancel their trips.

TIP: The traveler must select the I do not have any expenses to claim. Cancel my trip *option from the **File Expenses** drop-down list when confirming the "cancel trip" action. If the traveler has expenses to claim, E2 will create a final voucher to cover those expenses. The GA will be closed automatically after final vouchers are approved and paid, but you cannot cancel the GA.*

To cancel the group authorization, click the **Cancel Group Authorization** link in the Extras section on the GA Dashboard.

Figure 31: Group Authorization Dashboard — Cancel Group Authorization link

*NOTE: If the **Cancel Group Authorization** link is not available, the document may be pending approval or travelers may already have approved trips created from the GA.*

14.1 Results

When you cancel a GA, the following results occur:

- Travelers will receive an email confirming the cancellation of the GA, and advising the traveler to delete or cancel any travel plans created under the GA.
- If a travel authorization created under the GA is pending approval, the traveler can recall the document. If the document is not recalled, the approver is prevented from approving the document and must return it to the traveler. The traveler can delete the authorization after it is recalled or returned to them.
- Travelers will be unable to complete an authorization created under the GA. They will be directed to delete or cancel the document.

15 Amending a Group Authorization

You can make changes to a group authorization by amending the approved GA. You can change the following information:

- Travel dates
- Travelers

    NOTE: *You can add or remove travelers. You cannot, however, remove a traveler from the GA if they have created an authorization under the GA, and that authorization has been approved.*

- Estimated expenses per traveler
- Reimbursement types
- Accounting codes

    NOTE: *You can add accounting codes, but you cannot remove an accounting code from the GA.*

Complete the following steps.

1. Locate the group authorization you want to amend on the My E2 **Group Authorization** tab.
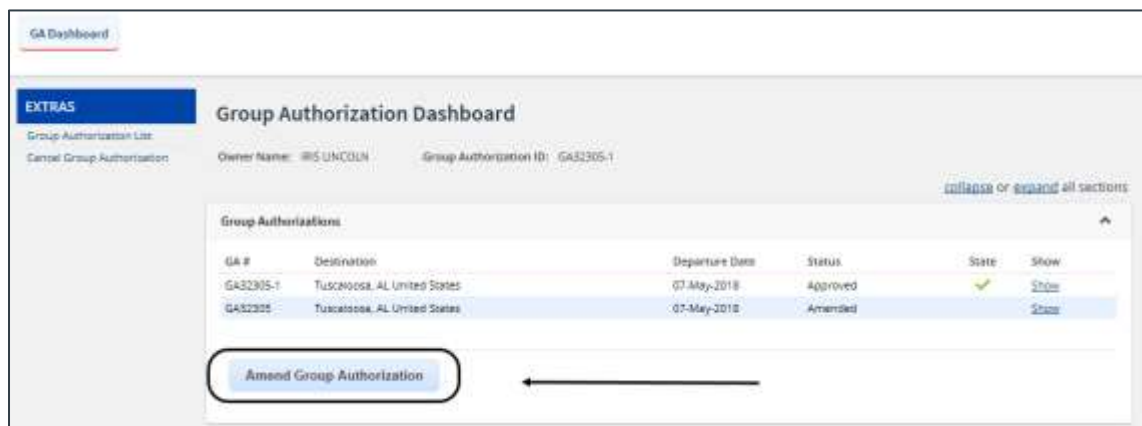2. Click the **Show** link. This displays the Group Authorization Dashboard page for that GA.

Figure 32: Group Authorization Dashboard — Amend Group Authorization button

3. Click **Amend Group Authorization**. A Confirm Action window displays to alert you that you are attempting to create an amendment to an existing group authorization, and that you will be required to resubmit the GA to your approver.
4. Click **Confirm**. This displays the Group Authorization Basic Information page.
5. Make your changes.
6. Click **Send to Approver** to resubmit the group authorization.

15.1 Amended Group Authorizations

After you make the changes, the amended group authorization is routed for approval. When the amended GA is approved, travelers receive email notification and the following actions occur:

- If a traveler is removed from the GA, any authorization created under the GA, that has not yet been approved, is no longer associated with the GA. The traveler can delete or cancel the authorization. If the traveler needs to retain their travel plans, the authorization can be submitted for approval as a regular TDY (single trip) authorization.
- Travelers who are added to the GA can create authorizations from the GA.

16 Creating a Travel Authorization from a GA

Each traveler on a group authorization is notified via email when the GA receives final approval. A **Create Travel Authorization** link for the GA also appears in the travelers' To Do Lists, on the My E2 **At a Glance** tab.

16.1 Accessing the GA

Select from the following methods to get started when creating an authorization from a group authorization.

16.1.1 To Do List

Click the My E2 **At a Glance** tab, and then click the **Create Travel Authorization** link for the GA in the To Do List.
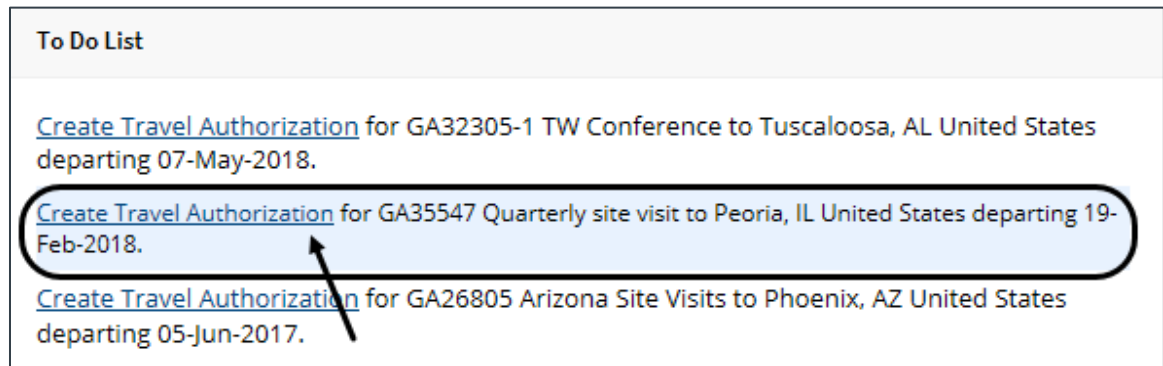

Figure 33: To Do List — Create Travel Authorization link

16.1.2 Start a Travel Document

Complete the following steps.

1. Select *Create an Authorization* from the **Start a Travel Document** list on the My E2 **At a Glance** tab.
2. Click **Go**. This displays the Authorizations Exist window.

Figure 34: Authorizations Exist window

3. Select the GA from the **OA or GA selection** drop-down list.
4. Click **Create Trip**.

16.1.3　My E2 Trips Tab

Complete the following steps.

1. Click **Start a New Authorization** on the My E2 **Trips** tab. This displays the Authorizations Exist window.
2. Select the GA from the **OA** or **GA selection** drop-down list.
3. Click **Create Trip**.

16.2 Creating the Authorization

When the authorization's Basic Information workflow page displays, complete the following steps to create the authorization from the GA.

Figure 35: Authorization From a GA — Basic Information page

1. Click **Save and Next Step** on the authorization's Basic Information page to create the authorization.
2. Complete all workflow steps.

   TIP: *Refer to* UG25 – Creating Authorizations *for more information on this process.*

   - Click the **Group Authorization Details** link in the Other Actions section to display the Group Authorization Details window, which allows you to review important information about the GA.

Figure 36: Group Authorization Details window

   - At each step of the workflow, fields reflect default information established on the GA. This information can be changed, but that action may result in the authorization being routed for approval, instead of inheriting the approval status of the GA.
   - Warning message will display when you make changes that will result in routing the authorization for approval.
3. When you reach the Summary step, review the authorization for accuracy and completeness.
4. Click **Complete Authorization**.

- If the authorization conforms to the properties and limitations of the GA, it automatically inherits the approval status of the GA.
- If the authorization is outside of the GA's properties and limitations, you are notified that the authorization will be routed for approval.

17   Revision History

Date	Description	Release
09/2021	Updated figure 34 (Authorizations Exist window)	21.3
04/2021	Added section 1 (Introduction)	21.1
07/2020	Updated screen shots	20.2
10/2019	Updated title page graphic and copyright information	19.3
03/2019	Copyright and logo updates	19.1
06/2018	Updated figures 8 (Group Authorization Site Details page) and 9 (Group Authorization Site Details – Multiple destinations)	18.2
03/2018	Updated: • Updated images throughout the document • Updated sections 3 (Getting Started), 4 (Completing the Basic Information Step), and 15.1.2 (Start a Travel Document) for the **Start a Travel Document** drop-down list	18.1
01/2018	Document formatting and layout changes	17.4
03/2017	Updated: • Section 4 (Completing the Basic Information Step) with a new Quick Links list image that includes the Show Held Reservations option • Images in section 10.2 (Attaching Documentation) for the new 10 MB file size allowed for attachments	17.1
06/2016	• Updated copyright • Updated section 9.2, Attaching Documentation, all images, deleting attachments information, History entries, fax instructions; removed references to **Retrieve Faxes** link	16.2
07/2015	Updated section 9, Other Actions, and section 9.6, View Routing History (including image)	15.3
04/2015	Updated Group Authorization details window image in section 14, Creating an Authorization from a Group Authorization	15.2
09/2014	Updated section 12, Canceling a Group Authorization, to include process if travelers have approved authorizations	ETS2/14.3
06/2014	• Removed reference to conference reimbursement type from text and image in section 6, Completing Expense Details • Updated dimensional account code search information in section 7.1, Selecting Accounts to Fund Your Expenses	ETS2/14.2
01/2013	Copyright updates	ETS2
10/2012	General availability	ETS2

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