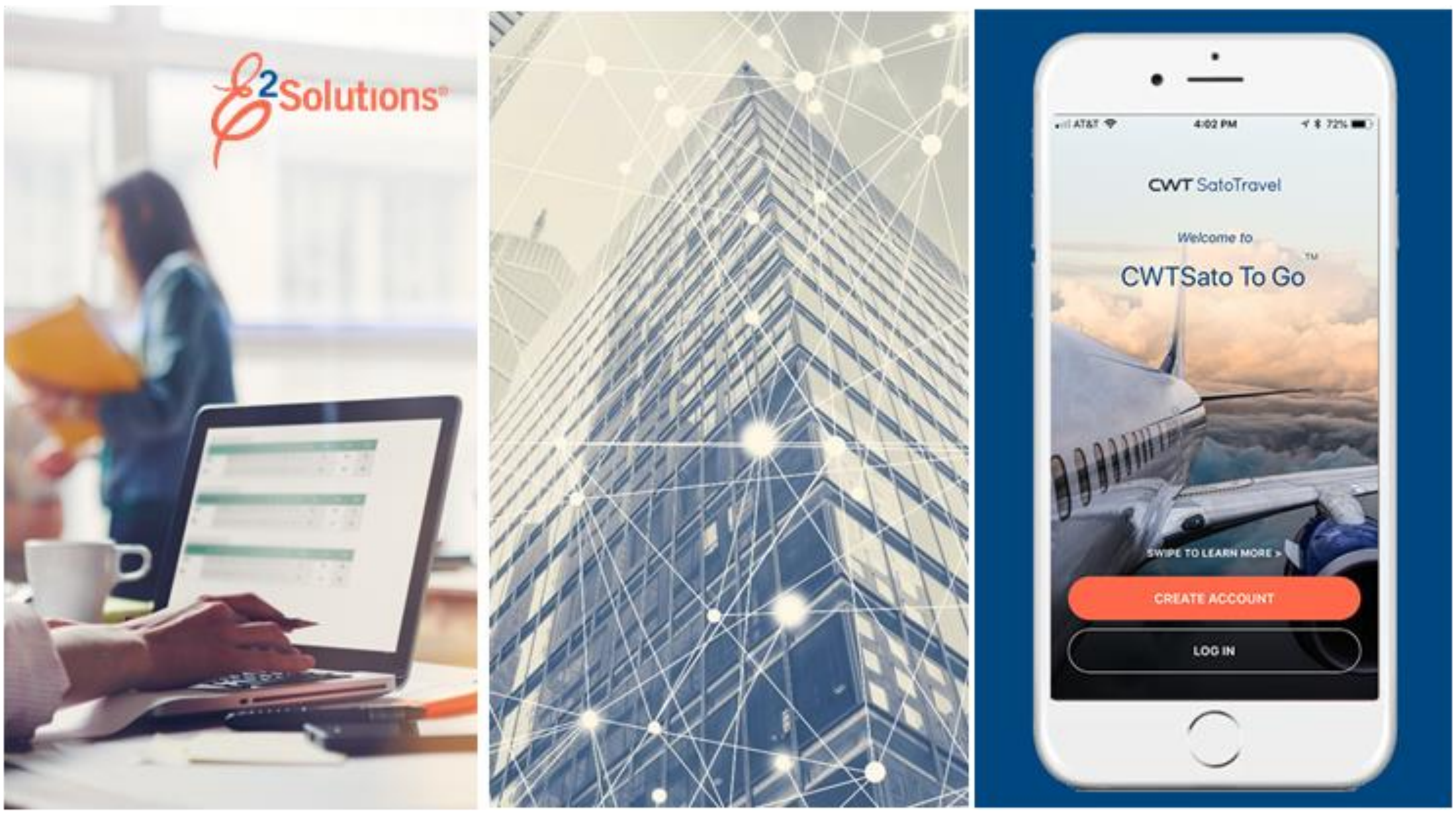

UG85: Approving Group Authorizations

Approving Group Travel Plans
Release 21.1 | April 2021

CWT SatoTravel

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1 Introduction

This document contains information regarding the group authorization approval 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 the Approval Process

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 the approval process for group authorizations (GAs) and trips created under a GA.

Authorization Type	Approval Process
Trip-by-Trip	Requires approval
Open (Blanket) Authorization	Requires approval
Group Authorization	Requires approval
Trip Under an Open or Group Authorization	Requires no additional approval unless the trip exceeds the limitations defined within the open (OA) or group authorization (GA), or some portion of the trip is outside of normal travel policy
Dependent Travel	Single travel requests require approval Requests to travel under an open authorization require no additional approval unless the trip exceeds the limitations defined within the OA, or some portion of the trip is outside of normal travel policy

2.1 Routing Pools

As an approver, you are assigned to one or more routing pools. Routing pools may include a primary approver, who is automatically assigned to approve all documents within the poo. If a routing pool does not have a primary approver, E2 makes the document available to all approvers in the pool until an approver takes action on the document (i.e., approves or returns for revision).

2.2 Routing Rules

Travel policy managers configure sets of rules that define when an authorization, voucher, or travel advance request (collectively known as a trip) requires approval. These rules are known as routing rules. Routing rules specify the approval even triggers, the approval action required, and the pool of approvers (routing pool) authorized to perform the approval process.

Group authorizations and other travel documents are dynamically routed through these sets of rules; approvals may occur at multiple levels within the management hierarchy. These rule sets may be simple or complex, static or frequently changed. Routing rules can be applied to all travelers in an office or workgroup, or to individual travelers.

2.3 Approver Actions

When the traveler submits a group authorization for approval, the document enters the approval process. E2 analyzes the routing rules and determines whether a rule triggers an approval event. If an approval event is triggered, E2 assigns the document to the appropriate approver, or pool of approvers, for action. E2 notifies you via email when there is a document assigned to you for approval.

Approvers review group authorization (GA) requests, ensuring that:

- The GA is within travel policy.
- The specified limitations are correct.

- The correct accounts have been selected to fund the GA.

If the GA is within guidelines, or properly justified if outside of guidelines, you typically approve the authorization. Depending on the individual travel request and the applicable routing rules, the GA may be passed to another approval level. If you are the last approver for a travel request, the owner is notified the GA has been approved, and all travelers are notified that they can create individual travel authorizations from the GA.

2.3.1 Additional Actions

As an approver, you can also take other actions. Depending on applicable travel policy, you may be able to:

- Add a document number
- Make funding changes; including allocations and account selection
- Add remarks and attach documentation

If there are problems with the GA that prevent your approval and that you cannot change, you can return the GA for revision.

3 The Workflow Workspace

Each time you review a group authorization for approval, 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 actions
- Header with general information, including the name of the document owner
- Main area, where you view or modify information
- Buttons and links, below the main area, allow you to save your changes
- 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 navigate to that place in the workflow, when necessary. Workflows are dynamic; the workflow you see reflects the workflow used by the traveler when creating the group authorization.
- **Other Actions** – Links to functions that are not part of the basic document workflow. These links only appear if the function is available to you, based on the state of the document and your workgroup's 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.

3.2 Document Header Information

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

Figure 1: Group Authorization Summary — Page header

For group authorizations, the header always includes:

- The name of the group authorization's owner
- Group authorization ID
- Document status

3.3 Main Area

The main area of the Group Authorization Summary page allows you to review the document information. Links within the main area may also allow you to return to a workflow step and make changes to the document. The main area of other pages in the workflow allows you to view detailed information, make changes, if allowed by travel policy, and save your changes.

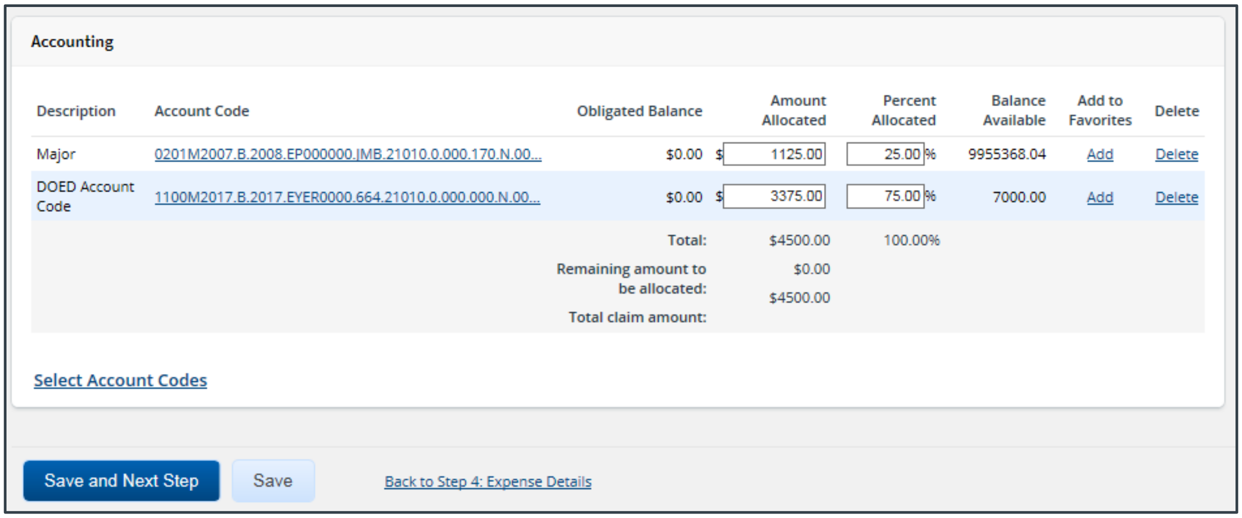

Figure 2: Group Authorization Accounting — Main area

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.)

- On the Group Authorization Summary page, the buttons allow you to complete approval actions for the group authorization.

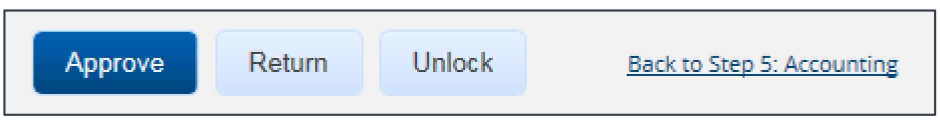

Figure 3: Group Authorization Summary — Buttons and links

- On other workflow pages, buttons allow 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 workflow process.

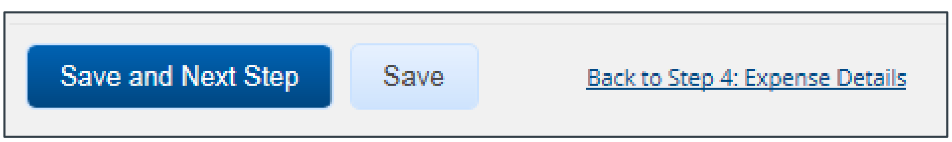

Figure 4: Group Authorization Accounting — Buttons and links

***TIP**: If you have changed information on a page, be sure to save that information before taking any other actions, or that information will be lost. For example, after updating accounting information, click **Save**, and then click the **Summary** workflow step to return to the Group Authorization Summary page and continue your document review.*

3.5 Dashboards

The GA Dashboard provides general information and access to all versions of the group authorization.

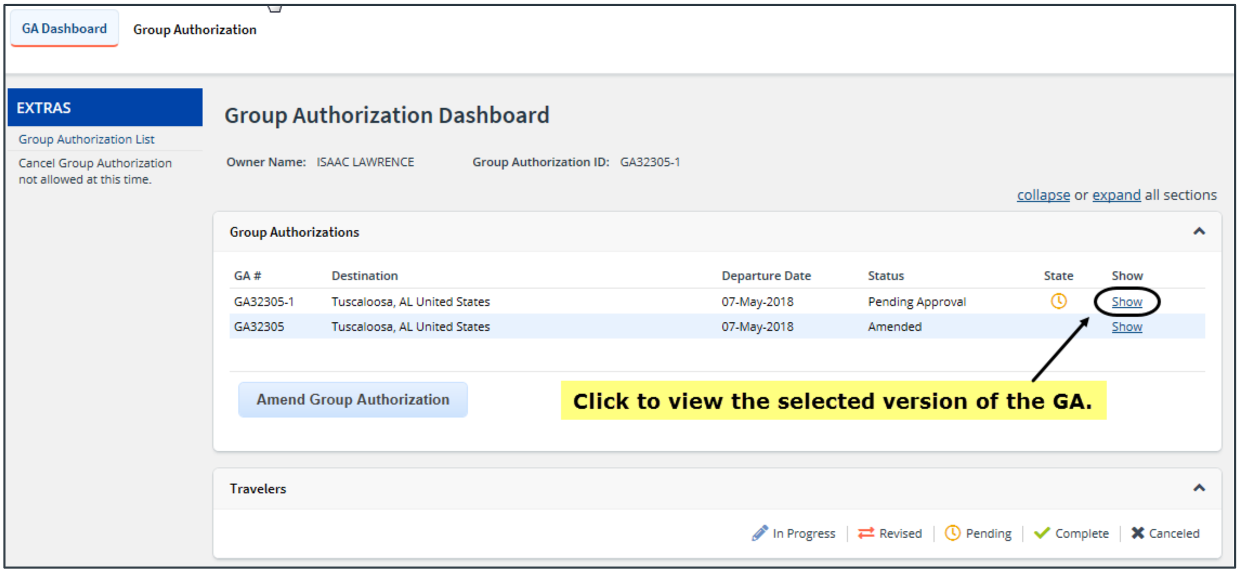

Figure 5: Group Authorization Dashboard — GA Pending Approval

4 Getting Started

E2 provides access to approver functions through the **My Approvals** option on the task bar. Complete the following steps to get started with the approval process.

1. Click **My Approvals** on the task bar. This displays the Pending Approvals page, which lists all documents that are assigned to you for approval (i.e., pending your approval).

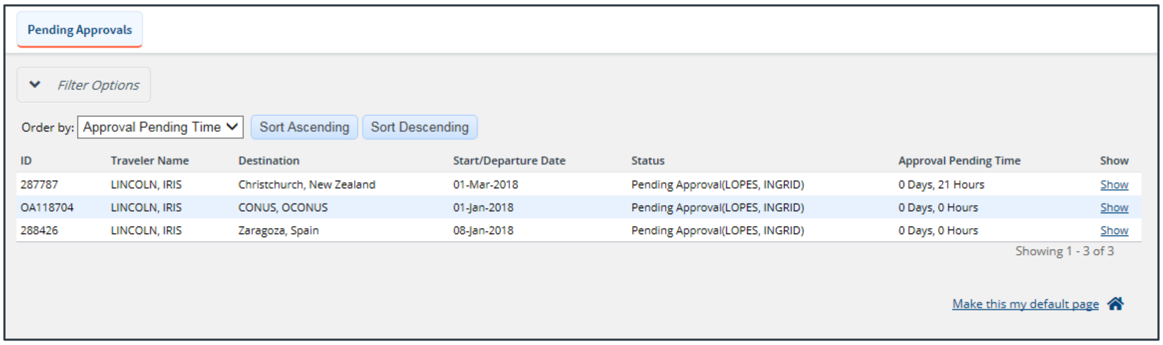

Figure 6: My Approvals — Pending Approvals tab

2. If necessary, use the Filter Options section to filter the list to all group authorizations pending your approval.
   a. Click the **Filter Options** tab to expand the section and view the filter options available for that page.

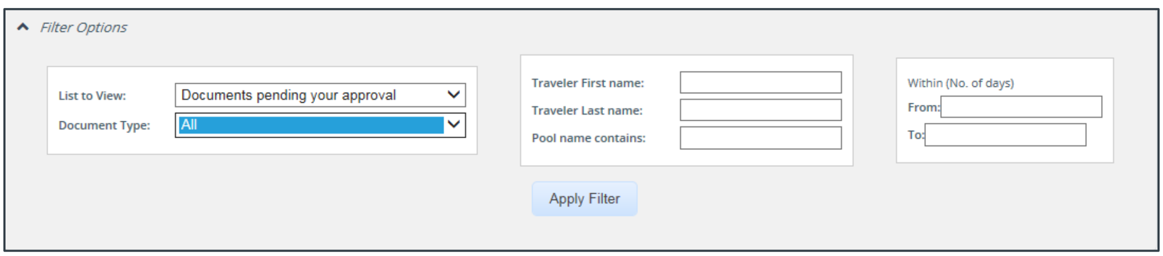

Figure 7: Pending Approvals — Filter Options

   b. Select *Group Authorizations* from the **Document Type** drop-down list to limit the list to only GAs pending your approval.
   c. Enter any additional filtering criteria to limit the number of search results returned.
   d. Click **Apply Filter** to generate a new list matching your search criteria.
3. Locate the group authorization in the search results.
4. Click the **Show** link. This displays the Group Authorization Summary page.

***NOTE**: By default, all sections of the Group Authorization Summary page are expanded.*

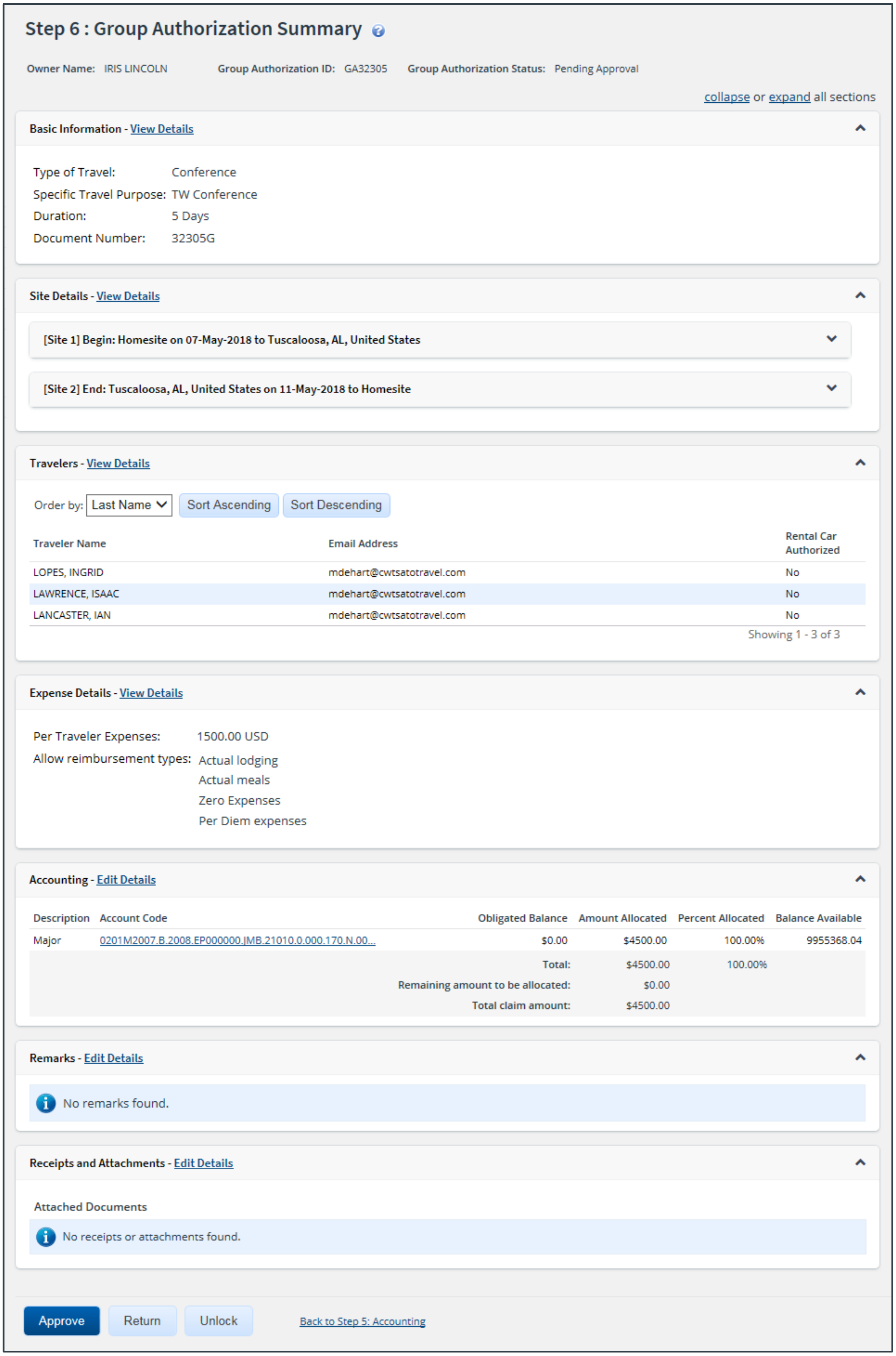

Figure 8: Group Authorization Summary — GA Pending Approval

5. Verify the group authorization is locked to you.
6. Use the Group Authorization Summary page to review the GA. If you need to see additional information or make changes to a section, click the **View Details** or **Edit Details** link for that section. Be sure to save your changes.
7. Return to the Group Authorization Summary page when you are done making changes to a section.

4.1 Lock the Group Authorization

Locking a document prevents any other approver from taking action on that document. You cannot approve a group authorization (or take any other action) unless it is locked.

- If you are the primary approver in your routing pool, the GA is typically assigned to you for approval, and it should already be locked when you open it. The GA is locked to you if the **Unlock** link displays in the Other Actions section, and the **Unlock** button appears at the bottom of the page.

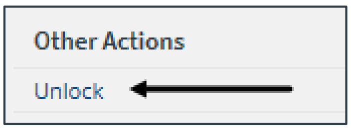

Figure 9: Unlock link

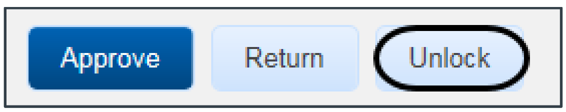

Figure 10: Unlock button

- If the **Lock** link displays in the Other Actions section, and the **Lock** button appears at the bottom of the page, the document is not currently locked to any approver. Click the **Lock** link (or **Lock** button) to continue.

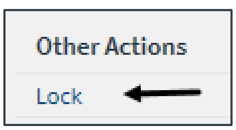

Figure 11: Lock link

5 Reviewing Basic Information

General information about the group authorization displays in the Basic Information section of the Group Authorization Summary page. Basic information includes:

- Type of travel
- Travel purpose
- Trip duration
- Document number

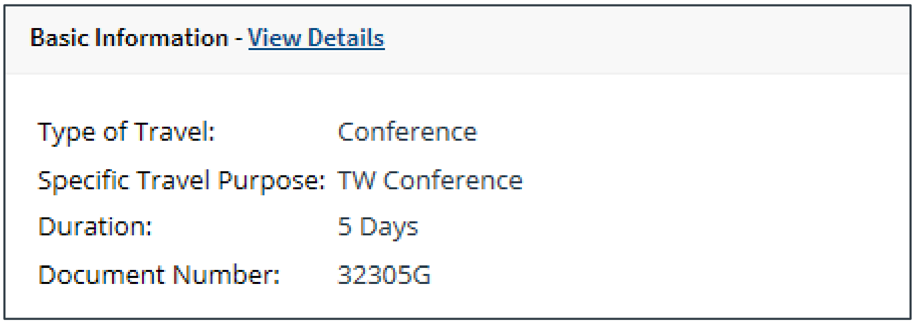

Figure 12: Group Authorization Summary — Basic Information section

5.1 Document Number

E2 typically generates a unique document number for each GA. Some financial systems, however, are configured to require or allow users to enter a customer document number. If a custom document number is required or allowed, the **Document Number** field is enabled on the Group Authorization Basic Information page. The Basic Information section on the Group Authorization Summary page may show a document number, if one has already been entered, or the text *(to be entered manually)*.

NOTE*: This is an optional feature that may not be available to you. Even if the* ***Document Number*** *field is enabled, you may not need to add the information. Consult your workgroup's travel policies for the appropriate actions.*

5.1.1 Rules

The following rules apply to a custom document number.

- The number can be added at any time, but it must be added to the document by final approval.
- The number can be changed at any time before the document is interfaced with the financial system.
- Characters can be entered in any case; E2 converts all characters to upper case.
- The number must meet the format required by the financial system.

5.1.2 Process Flow

Complete the following steps to add a document number to a group authorization.

1. Click the **View Details** link in the Basic Information section on the Group Authorization Summary page. This displays the Group Authorization Basic Information page.

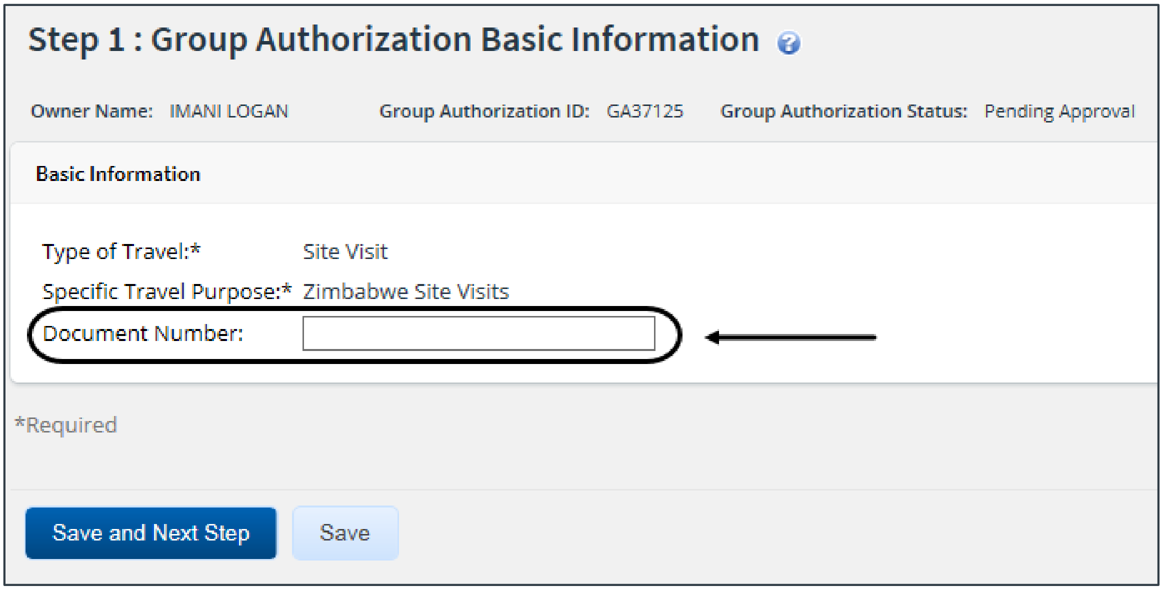

Figure 13: Group Authorization Basic Information — Document Number field

2. Enter the document number, using the appropriate format, in the **Document Number** field. (Float the pointer over the field to display format information in the hover text.)
3. Click **Save**.

6 Reviewing Site Details

General information about the group travel, including dates and per diem locations, displays in the Site Details section on the Group Authorization Summary page. Review the information provided and verify that it is accurate.

If the details are not already expanded, click the **Expand** button for each site section to view that site's details.

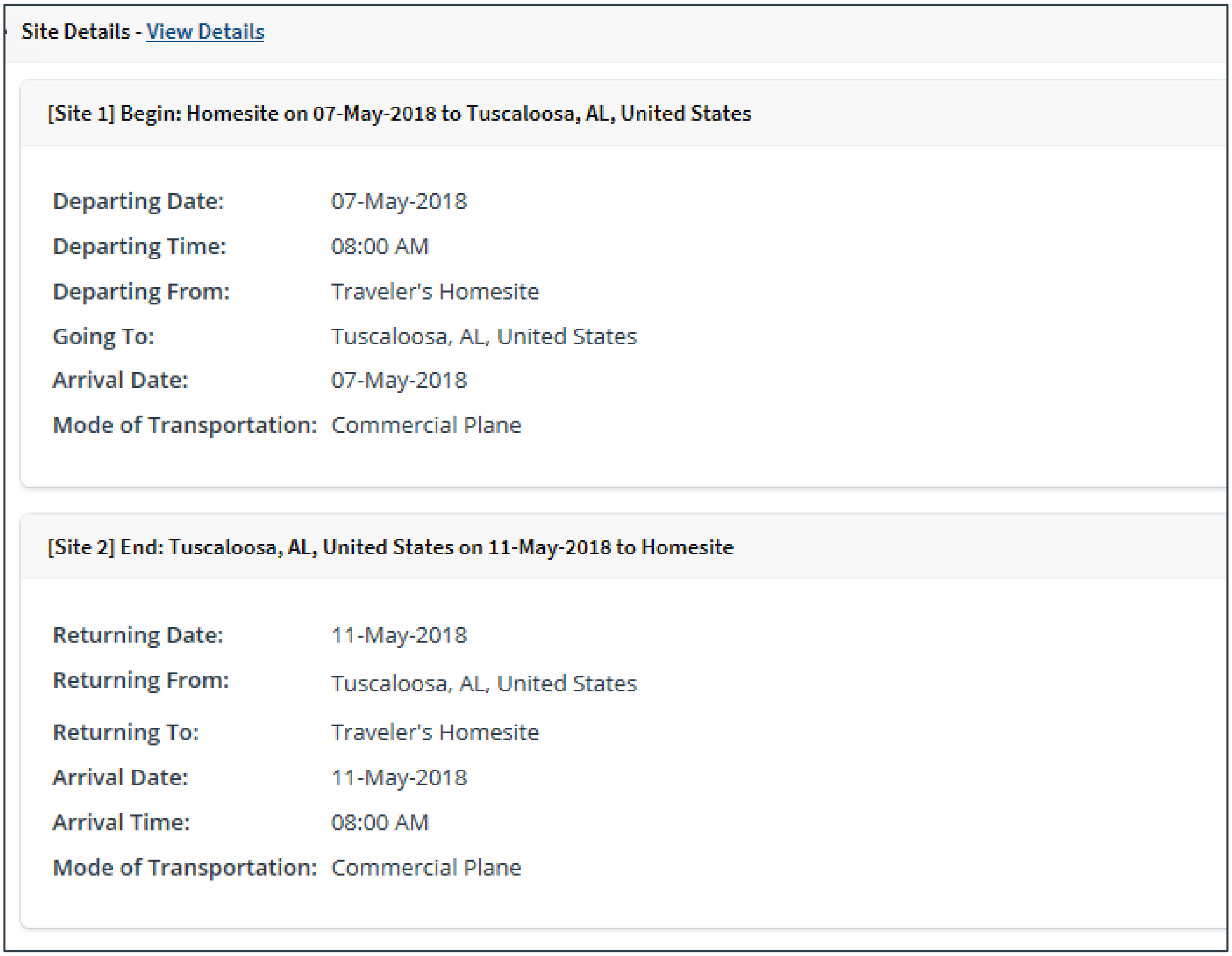

Figure 14: Group Authorization Summary — Site Details section

***NOTE**: The **Departing From** and **Returning To** fields will always show as* Traveler's Homesite. *When travelers create authorizations from this GA, however, they may have the option of selecting different departure and return sites, if their travel policy supports that capability.*

7 Reviewing Travelers

The Travelers section on the Group Authorization Summary page lists all travelers who will be allowed to create authorizations from this GA. It also indicates the travelers that will be authorized to book a rental car and include a rental car expense on their trip created from the GA. Review the information provided and verify it is accurate.

TIP*: A group authorization must include at least two travelers, and the owner of the GA is not required to be a traveler*.

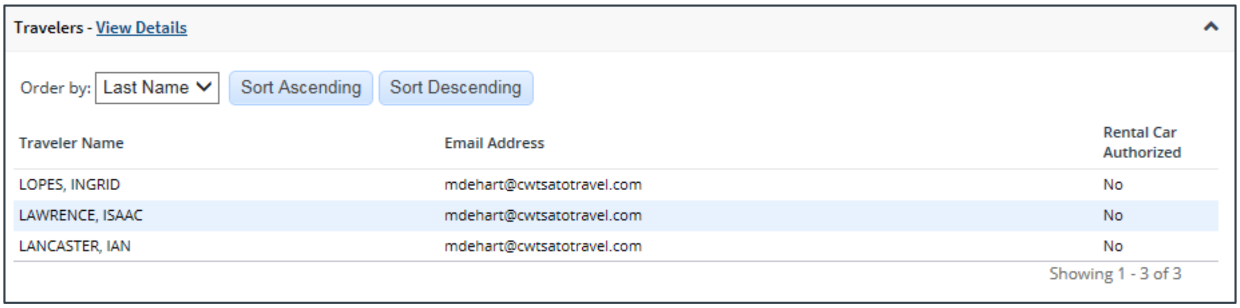

Figure 15: Group Authorization Summary — Travelers section

8 Reviewing Expense Details

The Expense Details section on the Group Authorization Summary page displays the estimated expenses per traveler. Any authorizations created from the GA that exceed this amount will be routed for approval.

This section also indicates the additional reimbursement types that will be available for selection on authorizations created from the GA. The Per Diem and Reduced reimbursement types are always available. The optional types available are controlled by the owner's travel policy and may include:

- Actual lodging
- Actual M&IE
- Zero expenses

Figure 16: Group Authorization Summary — Expense Details section

9 Reviewing Accounting

The Accounting section on the Group Authorization Summary page lists all accounts selected to fund travel expenses, as well as the amount allocated to each fund.

Before a group authorization can receive final approval, one or more accounts must be selected to fund the total estimated travel expenses. Travel policies differ; fund selection may be done by the document owner, or selection may be restricted to the approver. Regardless of travel policy, approvers should always review the account code selection and expense allocation.

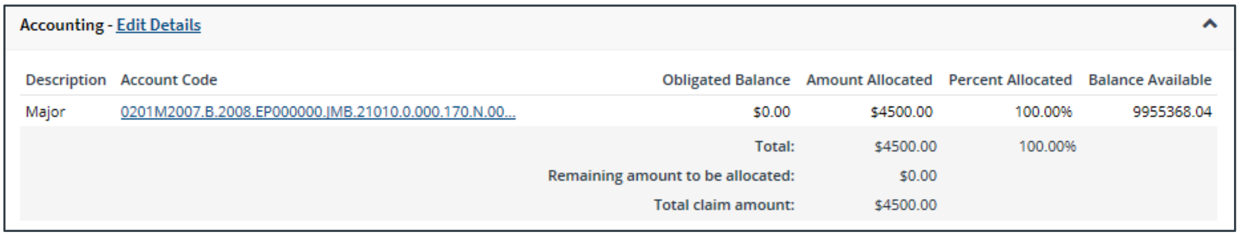

Figure 17: Group Authorization Summary — Accounting section

Complete the following steps.

1. Review the accounts selected to fund the GA, as well as the account balances, if available.
2. Click the **Account Code** link to view segment details for the selected account code.

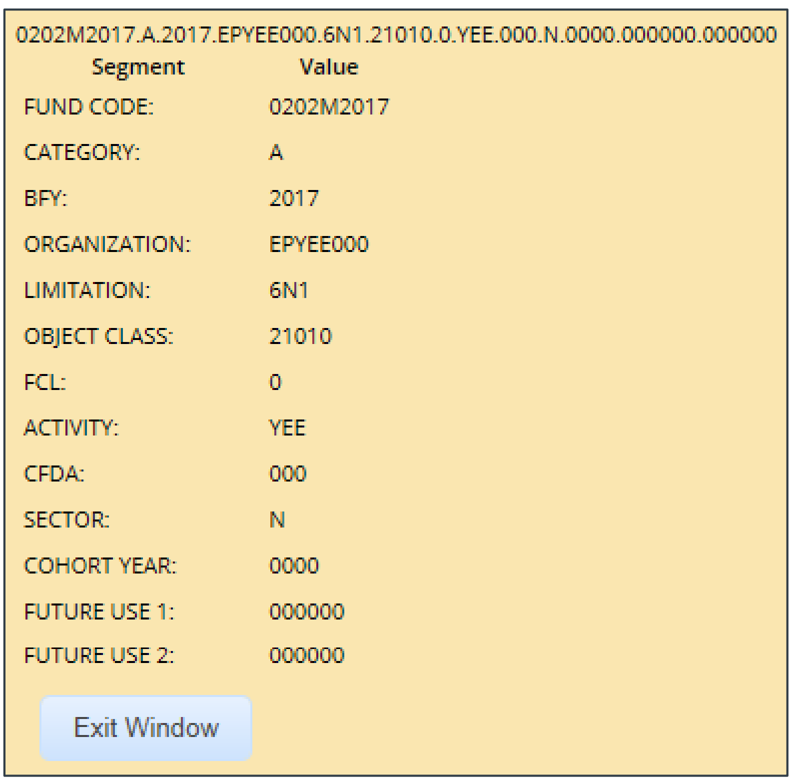

Figure 18: Account code segment details

3. If you need to make funding selections, or change existing funding selections or allocations, click the **Edit Details** link in the Accounting section header. This displays the Group Authorization Accounting page.

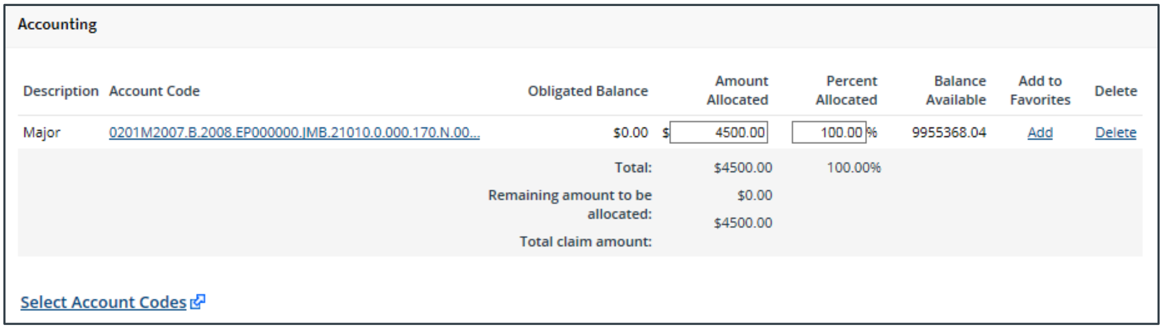

Figure 19: Group Authorization Accounting — GA Pending Approval

4. Make changes or select accounts.
   - 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 code as a favorite.
   - Click a **Delete** link to remove the corresponding account from the GA.
   - If you need to select accounts to fund expenses, click the **Select Account Codes** link to find new accounts or select accounts from favorites.
5. Click **Save** to save your changes.

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.*

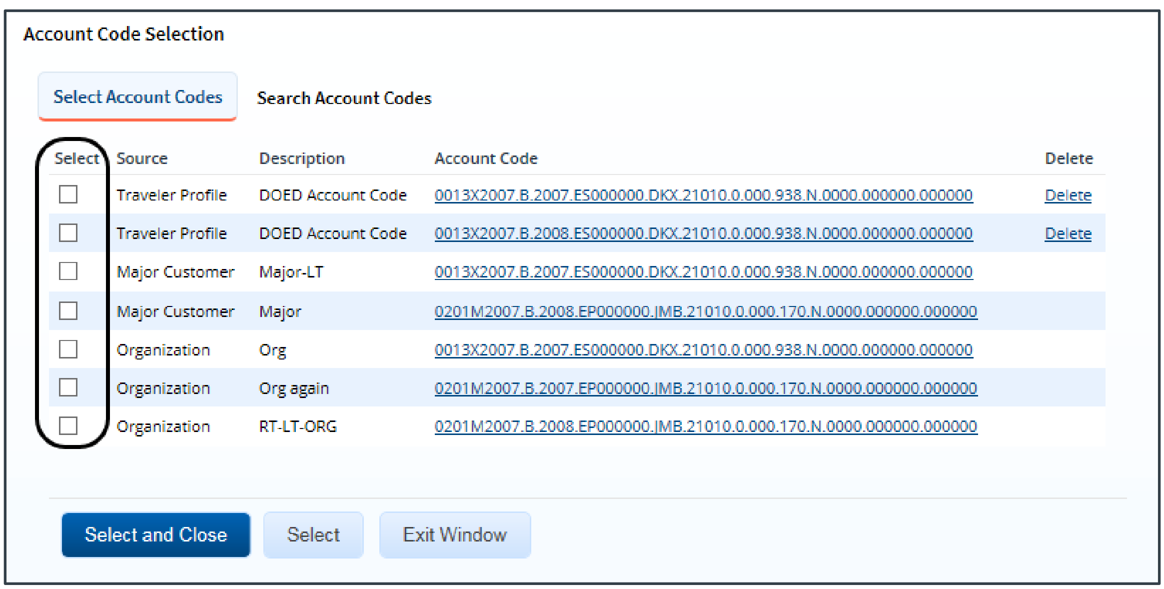

Figure 20: Account Code Selection — Select Account Codes tab

2. Click the **Select** check box to the left of each code you want to use to fund the estimated GA expenses.

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 other documents. 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.

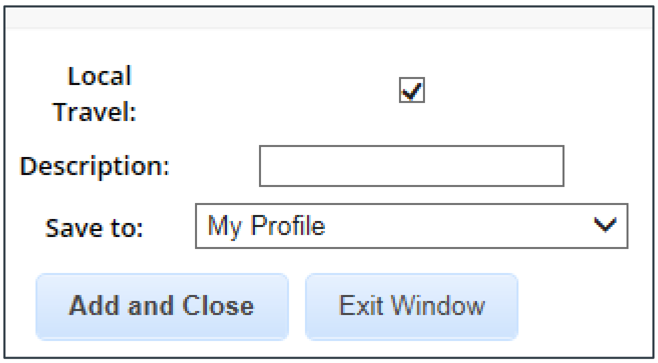

Figure 21: Accounting — Add to Favorites window

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 to 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.
    - 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.

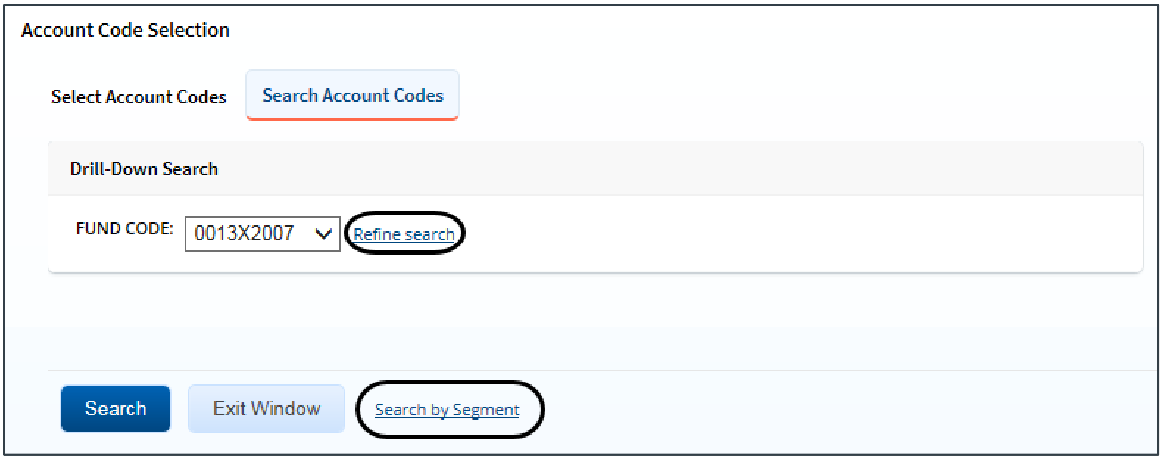

Figure 22: Account Code Selection — Search Account Codes tab

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.
     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 GA.
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 GA.

NOTE*: Dimensional account codes are not supported by all financial systems. If the* ***Add Account Codes*** *tab is not available, your agency financial system does not support this feature.*

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

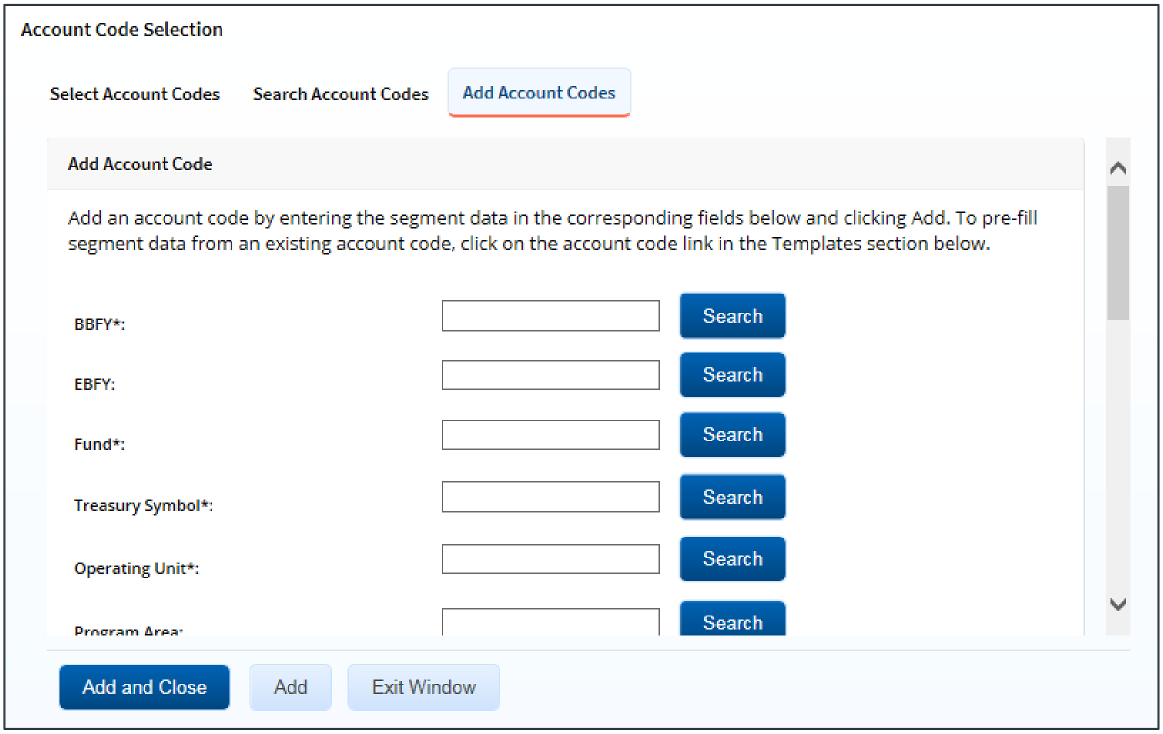

Figure 23: Account Code Selection — Add Account Codes tab

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.*

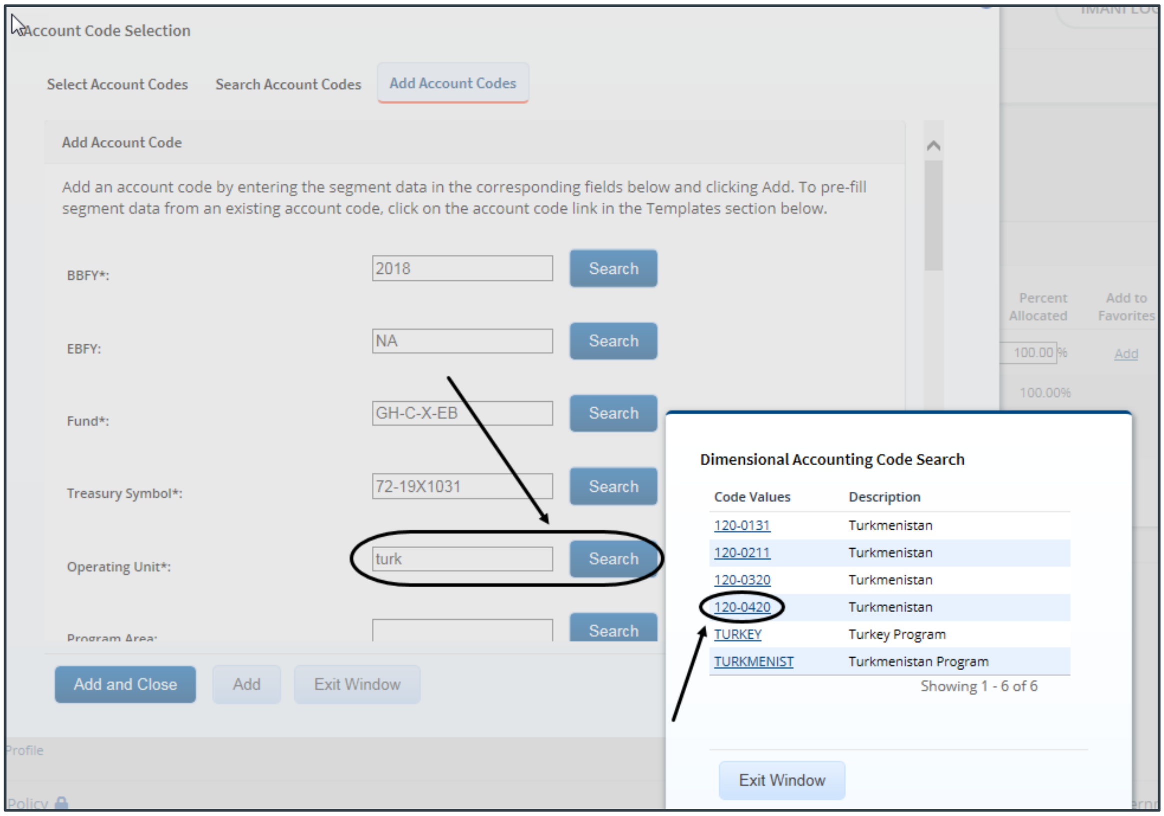

Figure 24: Dimensional Accounting Code Search

4. Click **Add and Close** to add the newly created dimensional account code to the GA, 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 GA 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.

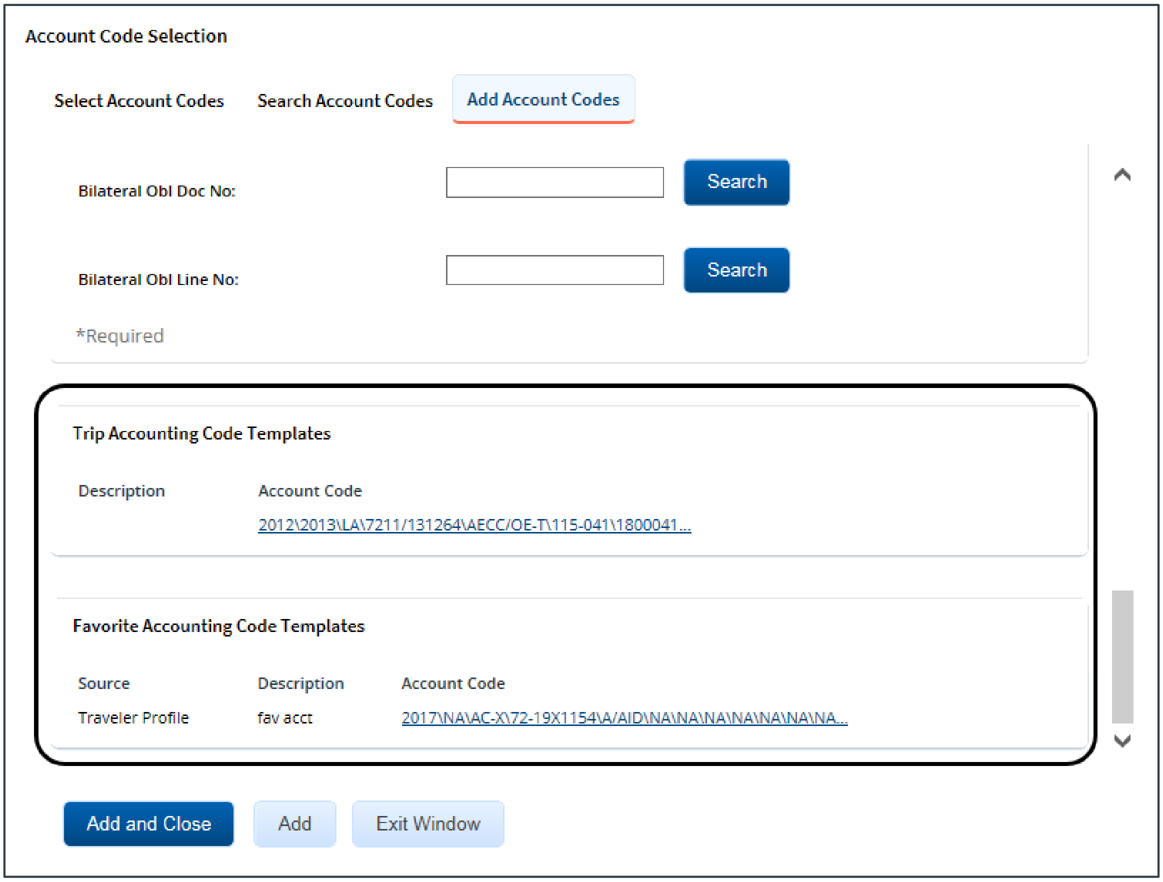

Figure 25: Account Code Selection — Accounting Code Templates

10 Reviewing Remarks and Attachments

The Group Authorization Summary page includes the Remarks and Receipts and Attachments sections. These sections allow you to view all document remarks and attachments before you complete your approval task.

10.1 Remarks

General remarks about the GA display in the Remarks section on the Group Authorization Summary page. The document's owner, or even a previous approver, may have added additional information to the GA request. You should always review any remarks attached to the GA.

TIP: *Remarks automatically display in a scrolling box. If you prefer to view the remarks as part of the page, click the* ***Expand Remarks*** *link.*

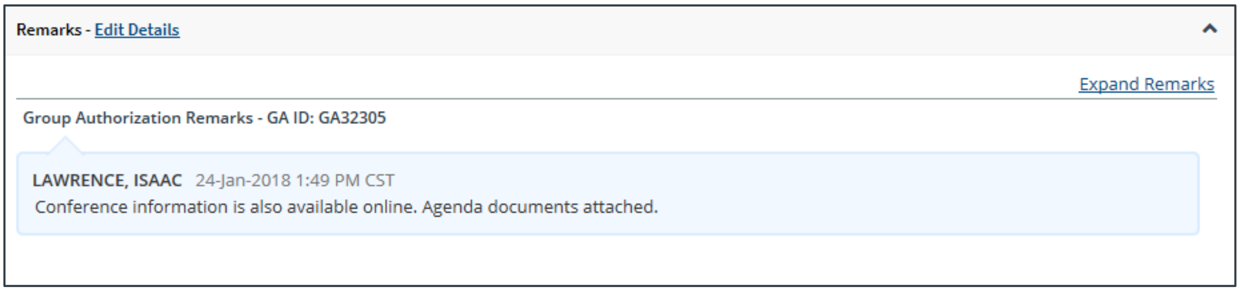

Figure 26: Group Authorization Summary — Remarks section

10.2 Receipts and Attachments

The Receipts and Attachments section allows you to review any document-level attachment. Click the **Show** link to view the attachment.

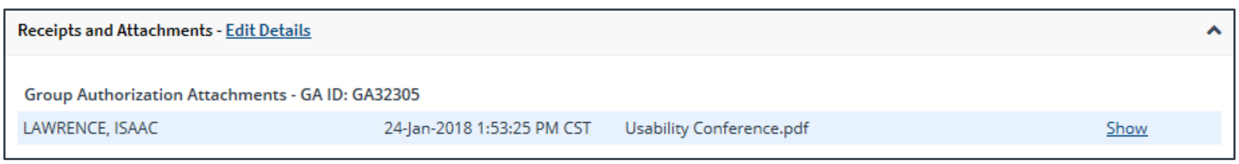

Figure 27: Group Authorization Summary — Receipts and Attachments section

11 Completing the Approval Process

When you have finished reviewing the group authorization, you have three options:

- Approve the GA
- Return the GA for revision
- Unlock the GA, so another approver within the routing pool can access the document and take action on it

11.1 Approving the Group Authorization

Complete the following steps.

1. Click **Approve** on the Group Authorization Summary page. This displays a Confirm Action window.

   NOTE*: The Confirm Action window may include fund obligation and balance details, depending on your agency's financial system*.

2. Click **Confirm**.

11.2 Returning the Group Authorization for Revision

A group authorization can be returned for revision to the document owner or a prior approver, based on the setting of the **Approver Can Return Document To** field in the Minor Customer Settings (i.e., Step 8: Minor Customer Approval Settings, DOCUMENT ROUTING). Refer to *AG50 – Hierarchy and Settings* for more information on this field.

NOTE*: When a group authorization is returned to an approver, the status of the trip will display as* Pending Approval*; when the group authorization is returned to the owner, the status of the trip will display as* Revised*.*

11.2.1 Traveler (Owner) Only

When the **Approver Can Return Document To** field is set to *Traveler Only*, a group authorization may be returned only to the document's owner for revision. Complete the following steps.

1. Click the **Return** button at the bottom the Group Authorization Summary page. This displays a Confirm Action window.

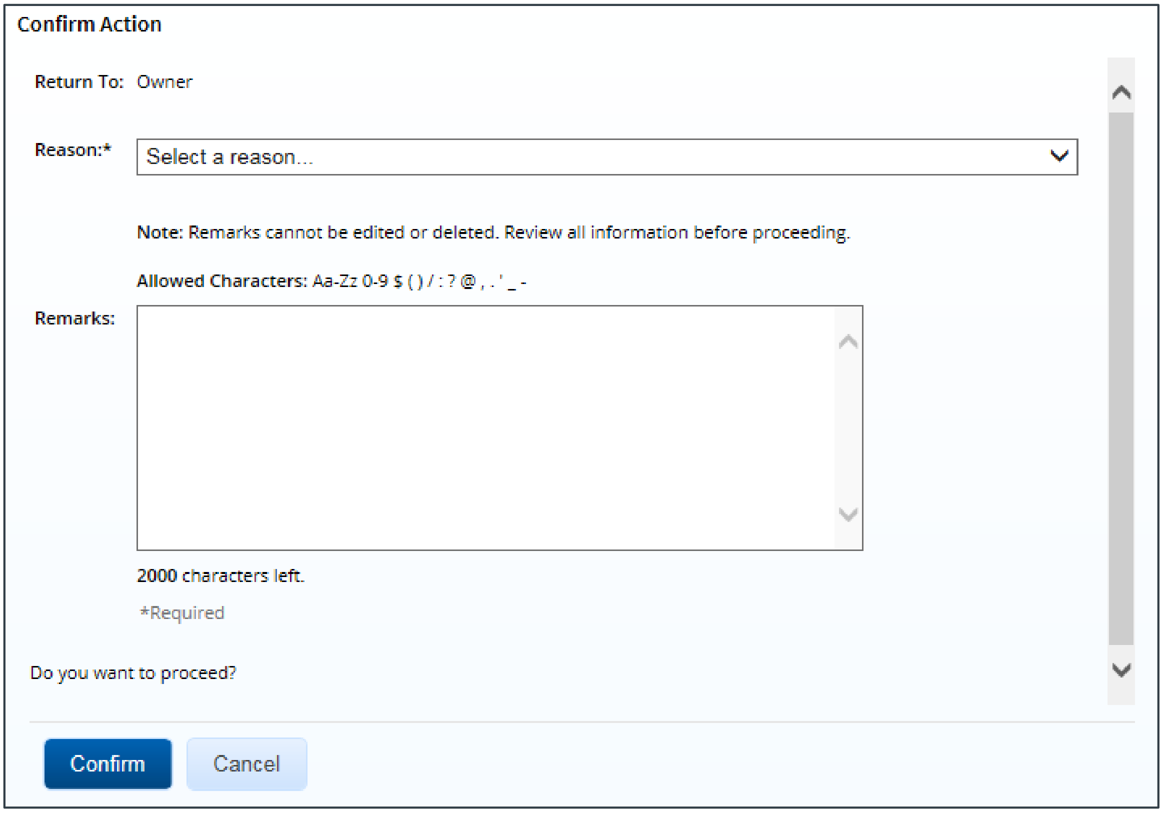

Figure 28: Confirm Action — Return to Owner

2. The **Return To** field defaults to *Owner* and cannot be modified. Select the reason you are returning the group authorization from the **Reason** drop-down list.
3. Enter any necessary remarks in the **Remarks** field.

   ***TIP**: Review your remarks before clicking **Confirm**. Remarks cannot be edited or deleted after you send them*.

4. Click **Confirm** to return the group authorization.

11.2.2 Traveler (Owner) or Approver

When the **Approver Can Return Document To** field is set to *Traveler or Any Prior Approval Level*, a group authorization may be returned to the document's owner or a prior approver for revision (provided the approver returning the document is the second or higher approver for the group authorization). The document will be returned to either the primary approver, if one exists, or the entire routing pool with instructions.

***NOTE**: If you are the first level approver on the group authorization, your only option is to return the document to the owner. When you click **Return**, the Confirm Action window appears similar to that in the previous figure — the **Return To** field defaults to* Owner *and is disabled*.

Complete the following steps.

1. Click the **Return** button at the bottom of the Group Authorization Summary page. This displays a Confirm Action window.
2. Select the person or group to whom you are returning the group authorization from the **Return To** drop-down list.

- The drop-down list displays the *Owner* option as well as all previous approval pools.
- If an approval pool has a primary approver, that person's name appears in parentheses to the right of the name of the approval pool (e.g., Routing Pool 1 (Doe, John C.)).

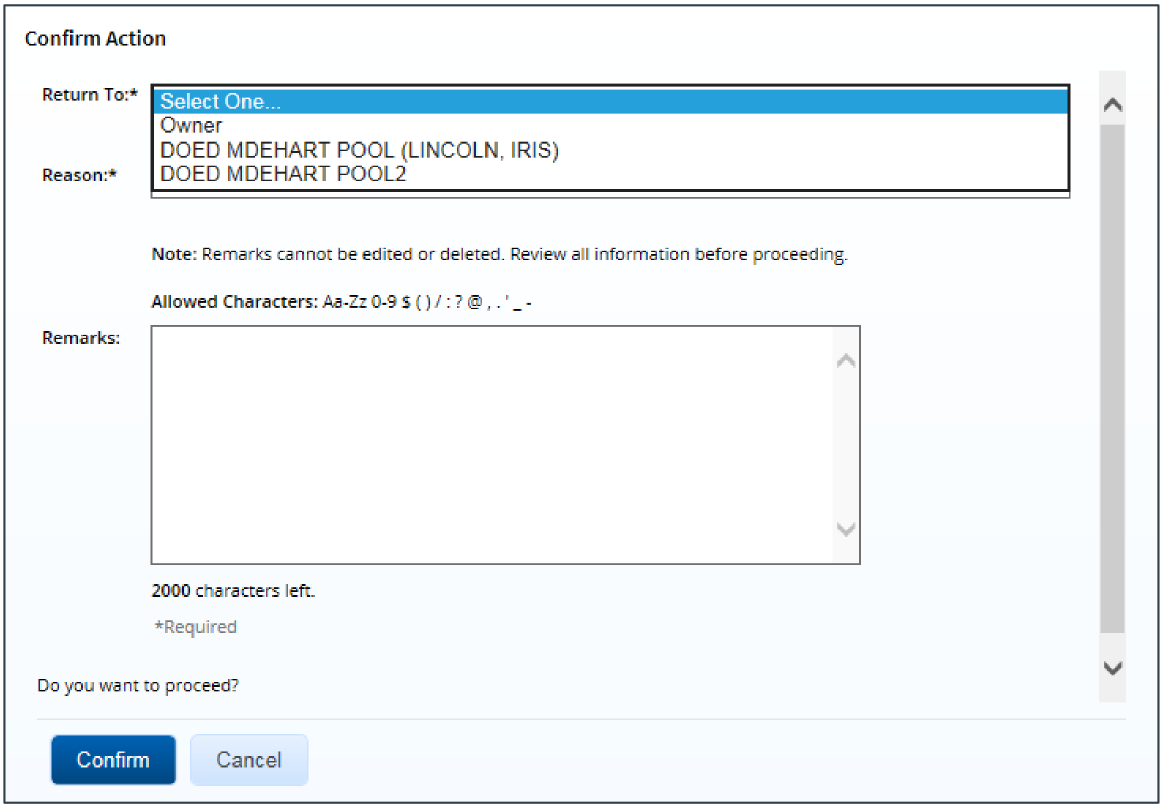

Figure 29: Confirm Action — Return to Owner or Approver

3. Select the reason you are returning the group authorization from the **Reason** drop-down list.
4. Enter any necessary remarks in the **Remarks** field.

   ***TIP**: Review your remarks before clicking **Confirm**. Remarks cannot be edited or deleted after you send them*.

5. Click **Confirm** to return the group authorization.

11.3 Making the Group Authorization Available to Another Approver

There may be times when you need to allow another approver in the routing pool access to the group authorization. If this situation occurs and the GA is locked to you, you must unlock it. Unlocking the GA makes it available to other approvers in the routing pool.

Click the **Unlock** link in the Other Actions section, or scroll to the bottom of the Group Authorization Summary page and click the **Unlock** button.

12 Other Actions

The Other Actions section contains links to actions you may want to perform while approving a group authorization, including:

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

12.1 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, including the document owner, auditors, or administrators.

Complete the following steps.

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

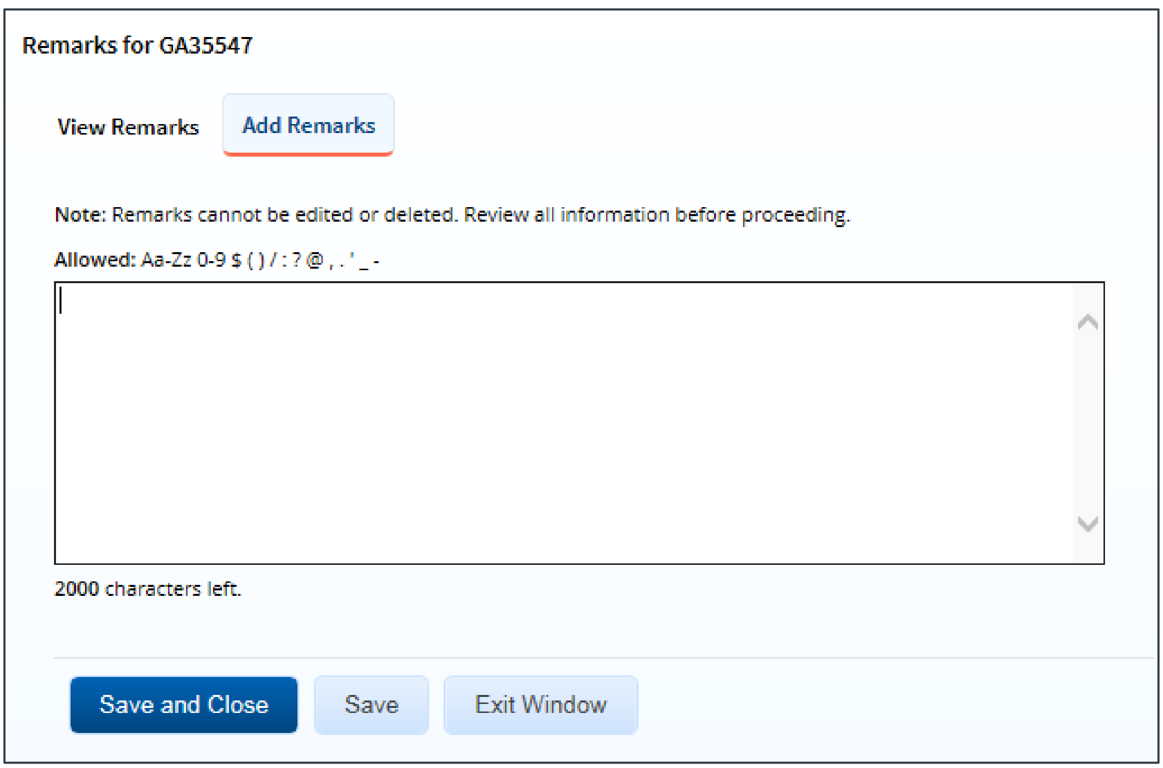

Figure 30: Remarks — Add Remarks tab for a group authorization

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.

12.2 Add Attachments

Like remarks, you can attach documents to the group authorization. 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.

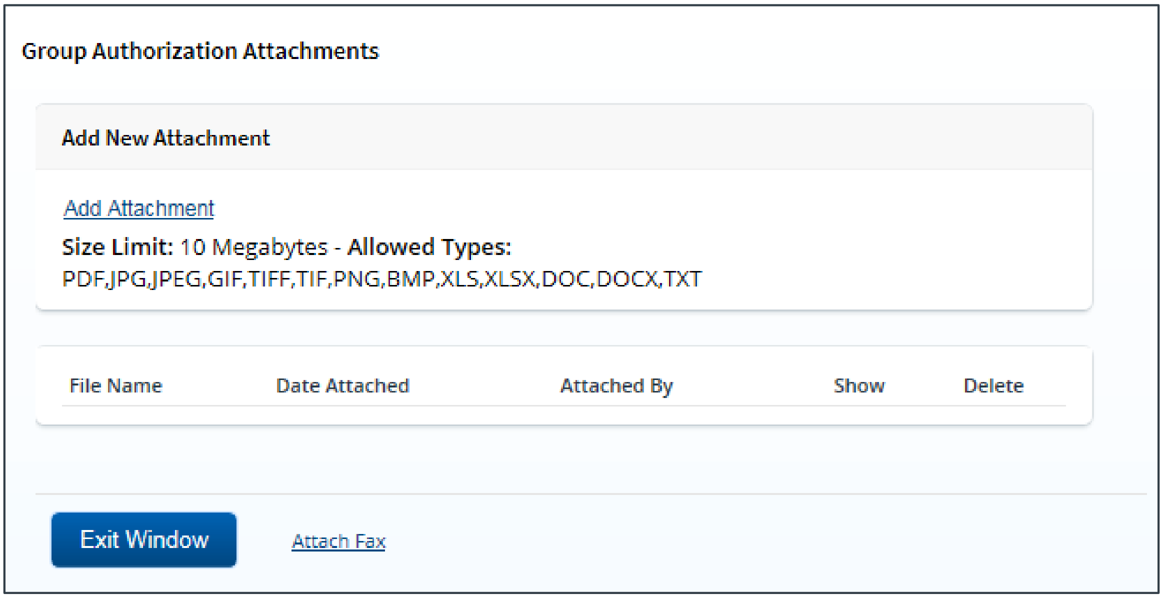

Figure 31: Group Authorization Attachments window

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.

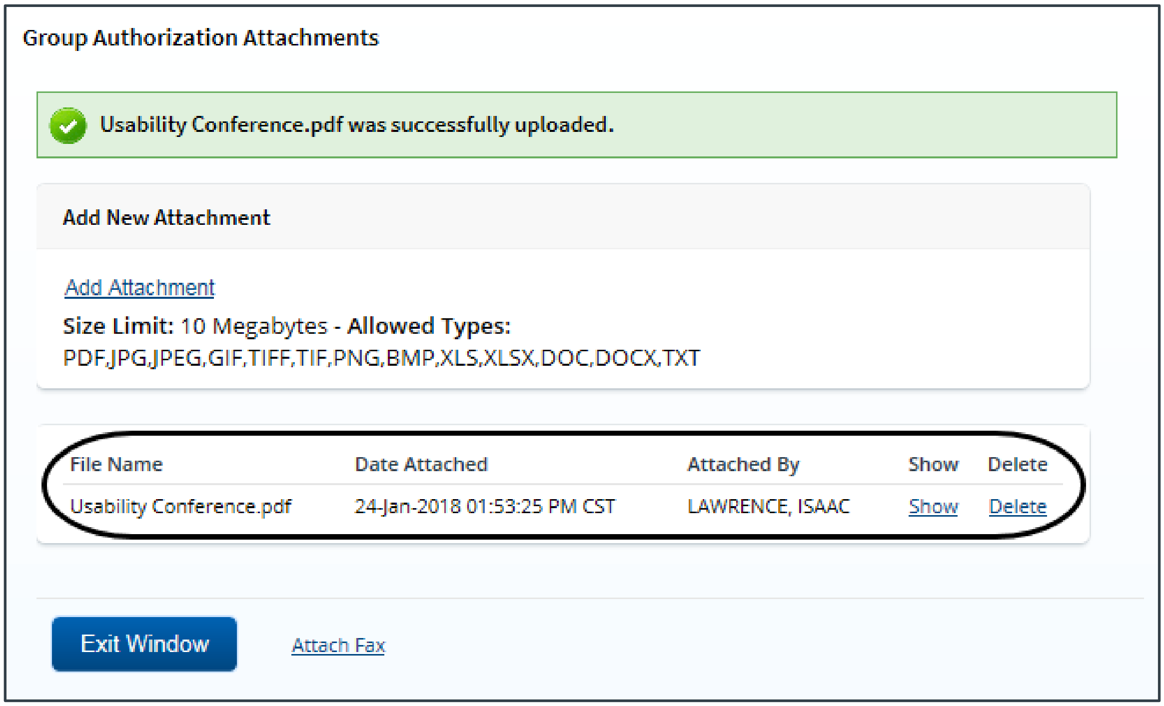

Figure 32: Group Authorization Attachments — Attached Document

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**.

12.2.1 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.*

12.3 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 33: Printable Group Authorization

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

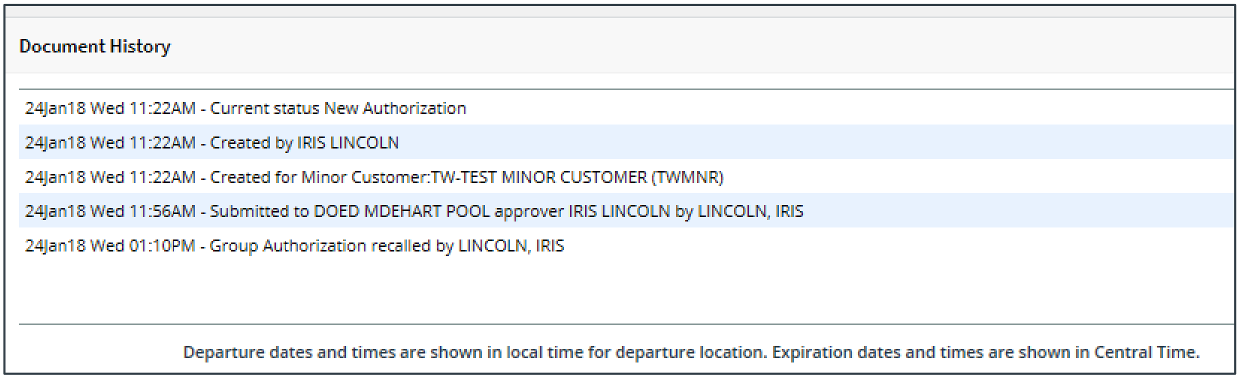

Figure 34: Group Authorization History page

12.5 View the Approval Routing Path

When a GA has been submitted for approval, it is sent on a specific path that may include multiple approval steps, which are triggered by a set of rules applied to the GA. Click the **View Routing Path** link to display the View Routing Path page, which allows you to view the approval path for the GA 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 GA is a member of this approver group.
- **Approval Reason** – The rules 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.

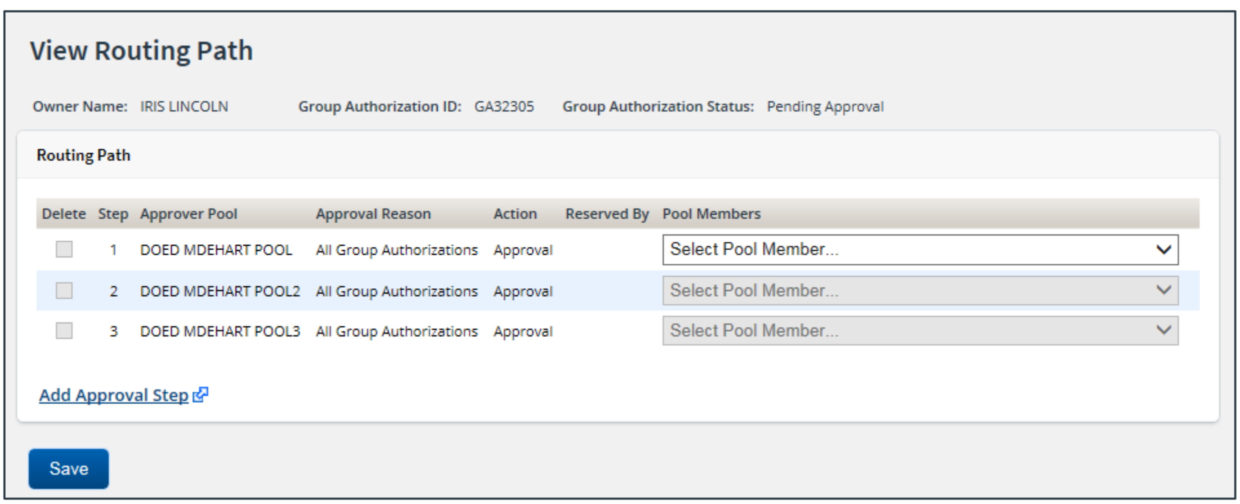

Figure 35: View Routing Path — Group Authorization

12.5.1 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.

12.6 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 the date and time of the event, action that triggered the event, and event details.

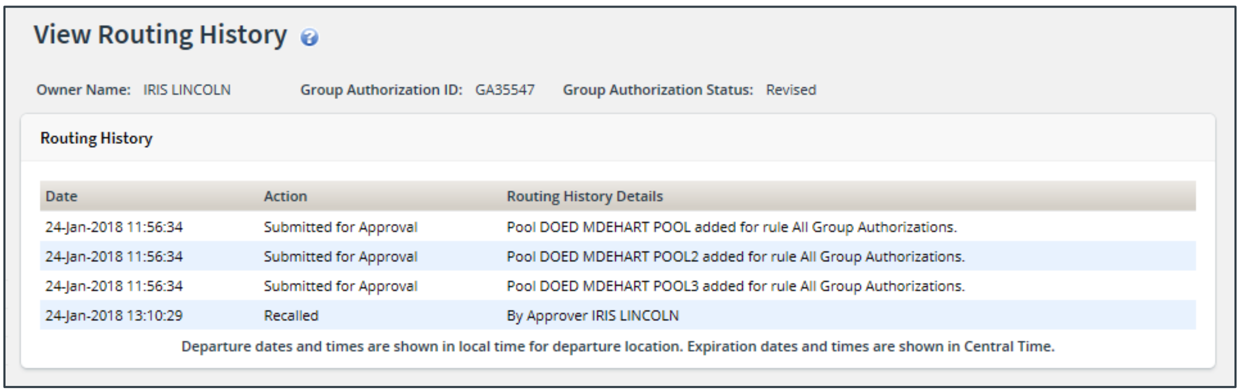

Figure 36: View Routing History — Group Authorization

13 Approving an Authorization Created Under a GA

Authorizations created under a group authorization inherit the approval status of the GA, as long as they conform to all of the properties and limitations of the GA. If the authorization does not conform to all of the properties and limitations, it is routed for approval. For example, if the authorization exceeds per traveler estimated expenses, or if the travel dates or per diem sites vary, the authorization is routed for approval.

The approval process for an authorization created from a GA is the same as for an authorization created for a single trip or an authorization created from an open authorization. Refer to *UG30 – Approving Authorizations* for more information on this process.

13.1 Group Authorization Details

When you are approving a trip created from a group authorization, it is useful to know the details of the GA. Click the **Group Authorization Details** link in the Other Actions section (on the left side of the authorization's Summary page) to display the Group Authorization Details window.

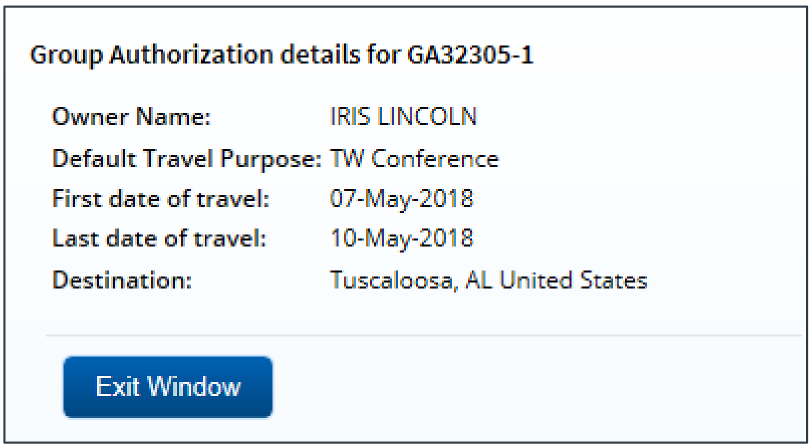

Figure 37: Group Authorization Details window

14 Revision History

Date	Description	Release
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
03/2018	• Updated images throughout the document • Updated section 3 (Getting Started) for the **Filter Options** tab now available	18.1
01/2018	Document formatting and layout changes	17.4
06/2017	Updated section 9.2 (Returning the Group Authorization for Revision) for the new feature that allows you to return the group authorization for revision to the owner or any prior approver	17.2
03/2017	Updated 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 8, Reviewing Remarks and Attachments, with new image; removed references to the **Display Faxed Documents** link • Updated section 10.2, Attaching Documentation, all images, deleting attachments information, History entries, and fax instructions; removed references to **Retrieve Faxes** link	16.2
07/2015	Updated section 10.6, Viewing Routing History (including image)	15.3
04/2015	Updated image in section 11, Approving an Authorization Created from a GA	15.2
06/2014	• Removed reference to conference reimbursement type from section 6, Reviewing Expense Details • Updated dimensional account code search information in section 7.1, Selecting Accounts to Fund Expenses	14.2
01/2013	Copyright updates	ETS2
10/2012	General availability	ETS2

15 Trademark and Copyright

CWTSato Travel Web Site: http://www.cwtsatotravel.com