



USCG UG65: Approving Open Authorizations

Reviewing and Approving Open Travel Requests
Release 22.1 | January 2022



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1 Introduction

This document contains information regarding the open 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.

1.1 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 open authorizations.

NOTE: The approval process for an amended OA is the same as that for the original OA.

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

1.1.1 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 pool. 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). The Funds Manager and AO routing pools have been created without a primary approver designated.

1.1.2 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 event triggers, the approval action required, and the pool of approvers (routing pool) authorized to perform the approval process.

Open 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 unit, or to individual travelers.

Most open authorizations will first route to the unit's Funds Manager routing pool and then to the unit's AO pool. Smaller units or offices may only have one level of approval.

1.2 Approver Actions

When a 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 open authorization (OA) requests, ensuring that:

- The OA is within travel policy.
- The specified limitations are correct.
- The correct accounts have been selected to fund the OA. (You can also make funding changes, including altering allocations and selected accounts.)

NOTE: *The Funds Manager approver is typically the first-level approver and will be the one to add the accounting codes (POET) to fund the OA. If accounting codes are not added by the Funds Manager, any other approver can add the POET lines.*

If the OA 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 open authorization will then route to the AO-level routing pool. If you are the AO approver, you will typically be the final approver for a travel request, and the traveler is notified that the OA has been approved and then can begin creating individual trips under the approved OA. If the traveler has included their supervisor's email address in their E2 user profile, the supervisor will receive the same emails as the traveler during the approval process.

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

2 Opening an Open Authorization Pending Your Approval

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).

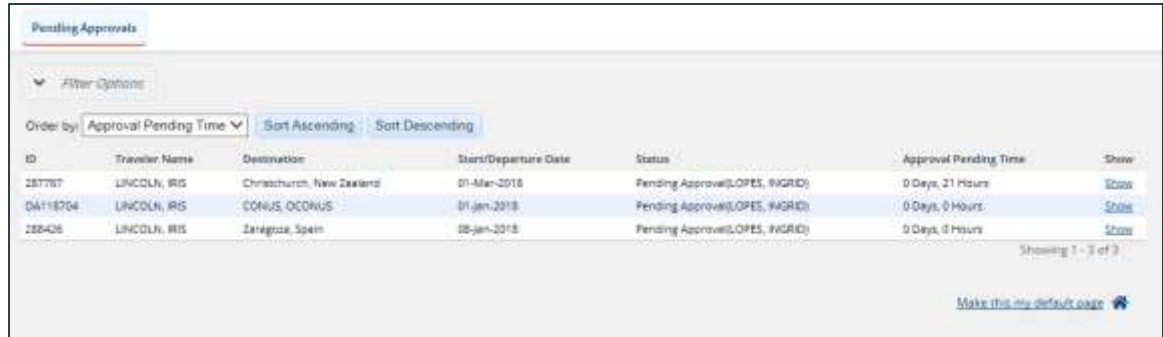


Figure 1: My Approvals — Pending Approvals tab

2. If necessary, use the Filter Options section to filter the list or view a list other than the default.
 - a. Click the **Filter Options** tab to expand the section and view the filter options available for that page.



Figure 2: Pending Approvals — Filter Options

- b. Select *Documents pending your approval* from the **List to View** drop-down list.
 - c. Select *Open Authorizations* from the **Document Type** drop-down list.
 - d. Enter any additional filtering criteria to limit the number of search results returned.
 - e. Click **Apply Filter** to generate a new list matching your search criteria.
3. Locate the open authorization in the search results.
 4. Click the **Show** link. This displays the OA's Summary page, a view that is very similar to what the traveler sees when creating the open travel request.

Step 5 : Open Authorization Summary 🔗

Traveler Name: IRIS LINCOLN
 Open Authorization ID: OA118704
 Open Authorization Status: Pending Approval

[collapse](#) or [expand](#) all sections

Basic Information - [View Details](#) ▲

Open Authorization Purpose: US Site Visits

First date of travel: 01-Jan-2018

Last date of travel: 31-Dec-2018

Allowable types of travel:

Conference
 Dependent Travel
 Entitlement
 Informational Meeting
 Relocation

Document Number: 1187040

Travel Details - [View Details](#) ▲

Allowed destinations: Worldwide (CONUS and OCONUS)

Restrict to specific sites: COUNTRY: United States

Allowed Transportation:

- All commercial modes of transportation
- All government modes of transportation
- All private modes of transportation
- All other modes of transportation

Expense Details - [View Details](#) ▲

Per trip expense limit: 5000.00

Total OA expenses limit: 25000.00

Allow travel advances: Advances allowed during trip creation, Advances allowed after trip creation

Allow reimbursement types:

- Actual lodging
- Actual meals
- Zero Expenses
- Per Diem expenses

Accounting - [Edit Details](#) ▼

Remarks - [Edit Details](#) ▼

Receipts and Attachments - [Edit Details](#) ▼

Approve
Return
Unlock
Back to Step 4: Accounting

Figure 3: Open Authorization Summary — Open Authorization Pending Approval

5. Verify the OA is [locked](#) to you.
6. Use the Open Authorization Summary page to review the OA. 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 Open Authorization Summary page when you are done making changes to a section.

2.1 Lock the Open Authorization

Locking an OA prevents other approvers from taking actions on the document. You cannot approve an OA (or take any other action) unless it is locked.

- If you are the primary approver in your routing pool, the OA is typically assigned to you for approval, and it should already be locked when you open it. The OA 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.

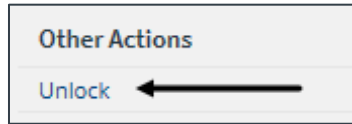


Figure 4: Unlock link

- 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.

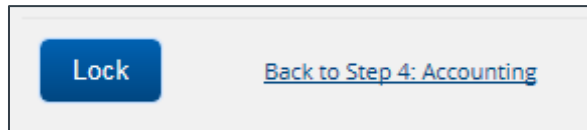


Figure 5: Lock button

3 Reviewing Basic Information

General information about the open authorization displays in the Basic Information section of the Open Authorization Summary page. This information includes travel purpose, allowed dates of travel, allowed types of travel, and document number.

Basic Information - [View Details](#)

Open Authorization Purpose: US Site Visits

First date of travel: 01-Jan-2018

Last date of travel: 31-Dec-2018

Allowable types of travel:

- Conference
- Dependent Travel
- Entitlement
- Informational Meeting
- Relocation

Document Number: 1187040

Figure 6: Open Authorization Summary —Basic Information section

4 Reviewing Travel Details

General information about the OA's travel restrictions displays in the Travel Details section on the Open Authorization Summary page. Review and verify the information is accurate.

Travel Details - [View Details](#)

Allowed destinations: Worldwide (CONUS and OCONUS)

Restrict to specific sites: COUNTRY: United States

Allowed Transportation: All commercial modes of transportation
All government modes of transportation
All private modes of transportation
All other modes of transportation

Figure 7: Open Authorization Summary — Travel Details section

5 Reviewing Expenses

General expense information for the OA displays in the Expense Details section on the Open Authorization Summary page. Review and verify the information is accurate.

Expense Details - View Details	
Per trip expense limit:	Not specified
Total OA expenses limit:	5000.00
Allow travel advances:	Advances allowed after trip creation
Allow reimbursement types:	Actual lodging Actual meals Zero Expenses Per Diem expenses

Figure 8: Open Authorization Summary — Expense Details section

6 Reviewing Accounting

Accounting information for the OA displays in the Accounting section on the Open Authorization Summary page.

Before an OA can receive final approval, the Funds Manager approver will need to add the lines of accounting (POET) to fund the OA. All approvers should always review the account code selection, and estimated expenses must be completely allocated prior to final authorization approval.

After the OA is approved, account codes entered for the OA will be automatically added to those trips created under the OA.

Description	Account Code	Obligated Balance	Amount Allocated	Percent Allocated
	UCGCH93PHC\21DEIGDEV01000 CG STEADY STATE TRAININ...	\$0.00	\$5000.00	100.00%
		Total:	\$5000.00	100.00%
		Remaining amount to be allocated:	\$0.00	
		Total claim amount:	\$5000.00	

Figure 9: Open Authorization Summary — Accounting section

Complete the following steps.

1. Review the accounts selected to fund the OA. If there are multiple accounts, verify that the total amount allocated covers all estimated expenses.

Step 4 : Open Authorization Accounting

Traveler Name: CARLOS GARCIA Open Authorization ID: OA43298 Open Authorization Status: Pending Approval

POET will be added by Funds Manager. Travelers and Arrangers can click Save and Next step.

Description	Account Code	Obligated Balance	Amount Allocated	Percent Allocated	Add to Favorites	Delete
	UCGCH93PHC\R1DEIGDEV01000 CG STEADY STATE TRAININ...	\$0.00	\$10000.00	100.00%	Add	Delete
		Total:	\$10000.00	100.00%		
		Remaining amount to be allocated:	\$0.00			
		Total claim amount:	\$10000.00			

[Select Account Codes](#)

Save and Next Step Save [Back to Step 3: Expense Details](#)

Figure 10: Open Authorization Accounting — OA Pending Approval

2. 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 Open Authorization Accounting page.
3. Make changes or select accounts.

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

6.1 Select Account Codes from a Favorites List

Complete the following steps to select account codes for the OA 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.

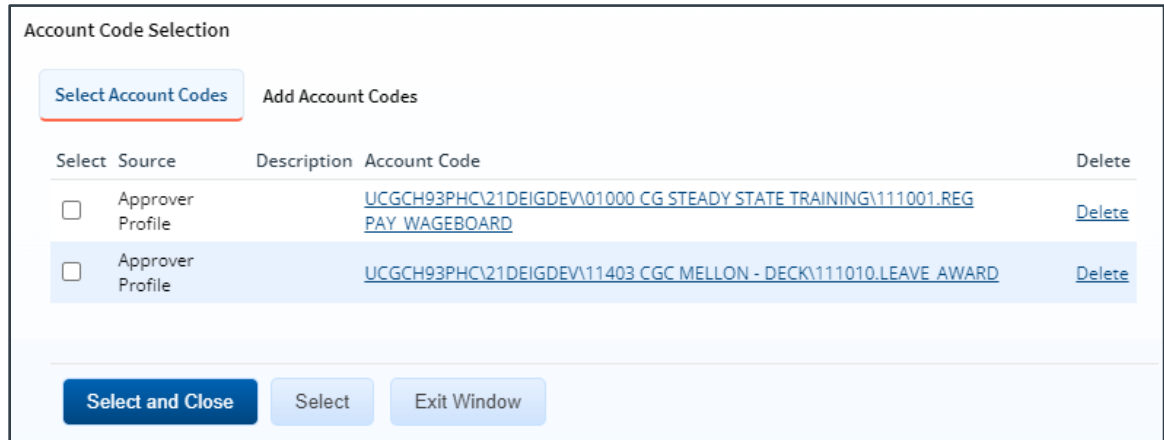


Figure 11: Account Code Selection — Select Account Codes tab

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

6.2 Add a Dimensional Account Code

Complete the following steps to add the POET lines to the OA.

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

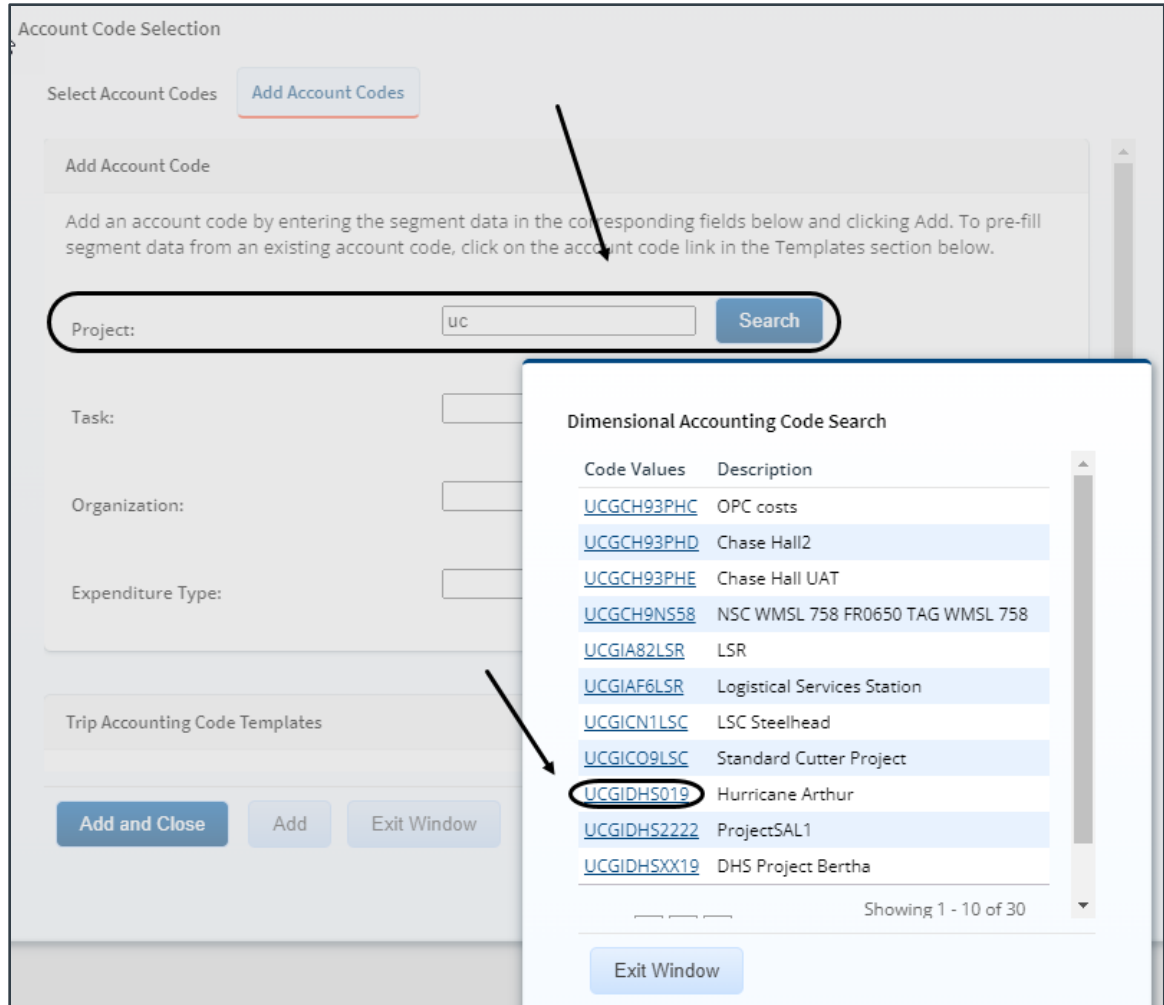


Figure 12: Dimensional Accounting Code Search

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

6.2.1 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 OA 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.

Account Code Selection

Select Account Codes [Add Account Codes](#)

Expenditure Type: [Search](#)

Trip Accounting Code Templates

Description	Account Code
UCGCH93PHCV21DEIGDEV01000 CG STEADY STATE TRAININ...	

Favorite Accounting Code Templates

Source	Description	Account Code
Approver Profile	UCGCH93PHCV21DEIGDEV01000 CG STEADY STATE TRAINING\111001.REG PAY WAGEBOARD	
Approver Profile	UCGCH93PHCV21DEIGDEV11403 CGC MELLON - DECK\111010.LEAVE AWARD	

[Add and Close](#)
[Add](#)
[Exit Window](#)

Figure 13: Account Code Selection — Accounting Code Templates

7 Reviewing Remarks, Receipts, and Attachments

The Open Authorization Summary page includes the Remarks and Receipts and Attachments sections. These sections allow you to view all document and expense-level remarks, receipts, and attachments before you complete your approval task.

7.1 Remarks

General remarks about the OA display in the Remarks section on the Open Authorization Summary page. The traveler or arranger, or even a previous approver, may have added additional information to the OA request. You should always review any remarks attached to the OA.

NOTE: Remarks may include system-generated events or information.

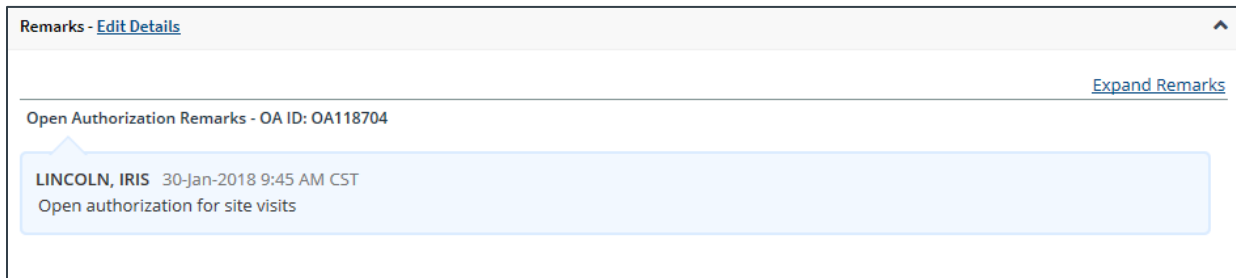


Figure 14: Open Authorization Summary — Remarks section

7.1.1 Expand Remarks

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

7.1.2 Add Remarks

Complete the following steps to add remarks to the open authorization.

1. Click **Edit Details** to open the Remarks window.

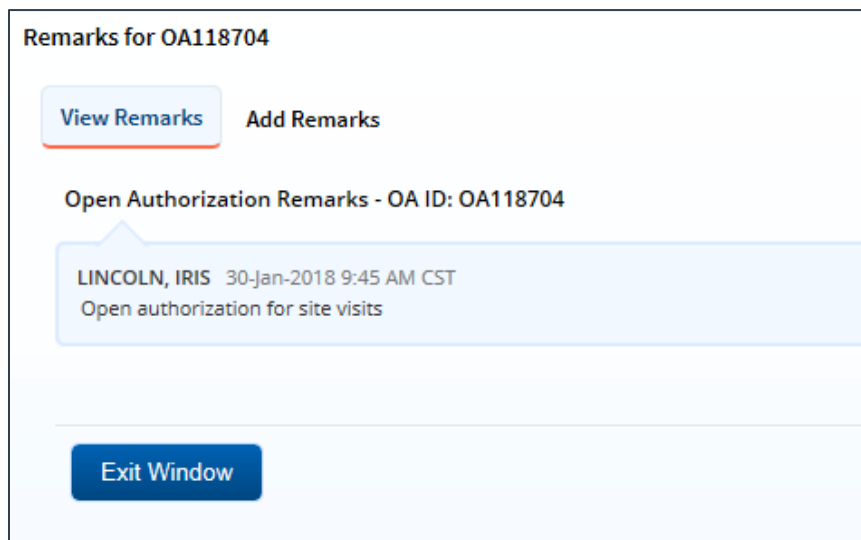


Figure 15: Remarks — Open Authorization remarks

2. Click the **Add Remarks** tab to add remarks to the OA.

Figure 16: Remarks — Add Remarks tab for an open 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.

7.2 Receipts and Attachments

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

Receipts and Attachments - Edit Details			
Open Authorization Attachments - OA ID: OA118704			
LINCOLN, IRIS	30-Jan-2018 9:48:15 AM CST	Usability Conference.pdf	Show

Figure 17: Open Authorization Summary — Receipts and Attachments section

8 Completing the Approval Process

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

- [Approve](#) the OA
- [Return](#) the OA for revision
- [Unlock](#) the OA, so another approver within the routing pool can access the document and take action on it

8.1 Approving the Open Authorization

Complete the following steps.

1. Click **Approve** on the Open Authorization Summary page. This displays a Confirm Action window.
2. Click **Confirm**. Open authorization validation occurs.
 - Errors that prevent the open authorization from being approved appear at the top of the Open Authorization Summary page. Correct the errors, and then click **Approve** again. Your Pending Approvals list displays a message that the OA was successfully approved, and the trip is removed from the list.
 - If this is a final approval, the open authorization is submitted for real-time validation to FSMS. Success or error messages from this validation process may appear after you click **Confirm**. In the case of warnings or errors that result in OA approval failure, contact your agency's financial system help desk for assistance on how to proceed.

8.2 Returning the Open Authorization for Revision

An open authorization can be returned for revision to the traveler or a prior approver (provided the approver returning the document is the second or higher approver for the OA). The document will be returned to the entire routing pool with instructions.

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

Complete the following steps.

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

Confirm Action

Return To:* Select One...

Reason:* Select One...

Traveler

CGTRAININGPOOL1

CGTRAININGPOOL2

Note: Remarks cannot be edited or deleted. Review all information before proceeding.

Allowed Characters: Aa-Zz 0-9 \$ () / : ? @ , . ' _ -

Remarks:

2000 characters left.

*Required

Do you want to proceed?

Confirm Cancel

Figure 18: Confirm Action — Return to Traveler or Approval Pool

3. Select the reason you are returning the open 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 open authorization.

8.3 Making the Open Authorization Available to Another Approver

There may be times when you need to allow another approver in the routing pool access to the open authorization. If this situation occurs and the OA is locked to you, you must unlock it. Unlocking the OA 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 Open Authorization Summary page and click the **Unlock** button.

9 Other Actions Available

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

- [Adding remarks](#)
- [Adding or deleting attachments](#)
- [Print the open authorization](#)
- [Viewing history](#)
- [Viewing routing history](#)
- [Viewing the routing path](#)

9.1 Add Remarks

Complete the following steps to view or add remarks for the open authorization.

1. Click the **Remarks** link in the Other Actions section. This displays the Remarks window. The [View Remarks tab](#) lists all remarks that currently exist for the advance.
2. Click the [Add Remarks tab](#).
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.

9.2 Add or Delete Receipts and Attachments

Click the **Attachments** link in the Other Actions section to open the Open Authorization Attachments window, which allows you to view existing attachments or attach a new document to the OA.

9.2.1 Uploading and Attaching a Document

Complete the following steps.

1. Click the **Attachments** link in the Other Actions section. This displays the Open Authorization Attachments window. The maximum file size and allowed file type information display below the **Add Attachment** link.
2. Click the **Add Attachment** link. This displays the system Choose File window.
3. Select the PDF file you want to attach to the open authorization.
4. Click **Open**. You are returned to the Open Authorization Attachments window. A success message displays when the document is attached, and the new document appears in the list.
5. Click the **Show** link to view the document.

***TIP:** If this is not the document you want attached to the open 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 Open Authorization History file.*

6. Click **Exit Window**.

9.3 Print the Open Authorization

Approvers at any stage of the document approval process may click the **Printable Open Authorization** link in the Other Actions section to open a printable version of the OA in a new browser window. Click the **Print** icon to print the document.

Official Open Authorization		
28 Oct 2021		
<small>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.</small>		
Document Number:		
Traveler Name CARLOS GARCIA	Status New	Open Authorization No OA43019
Type(s)of Travel ATTEND COURT/TRIAL (P2), DEPOSITIONS (P2), MISSION TRAVEL (P2), OFFICIAL MEETINGS (P2), OTHER TRAVEL (P2), SITE VISIT (P2)	Purpose of Travel Quarterly OA	
First Day of Travel 10-01-2021	Last Day of Travel 10-31-2021	
Destination Type CONUS and OCONUS	Specific Destinations None	
Limit Expenses for Each Trip \$0.00	Estimated Open Authorization Cost \$5000.00	
Advances Allowed After authorization is approved	Transportation Allowed Commercial Auto, Commercial Bus, Commercial Plane, Commercial Rail, Commercial Vessel, Ferry, Subway, Taxi, Govt Auto, Govt Bus, Govt Plane, Govt Train, Govt Vessel, Private Auto, Private Motorcycle, Private Plane, Not Applicable / No Cost	
Reimbursement Type Allowed Actual Lodging, Actual M&IE		
Approving Official		
Accounting Codes: No accounting codes selected.		
Remarks:		

9.4 View Trip History

Click the **View History** link in the Other Actions section to display the Open Authorization History page. This page allows you to view an audit trail of actions taken on the OA, including the date and time of the event, actions taken on the document, and the document's status.

9.5 View Routing History

Click the **View Routing History** link in the Other Actions section to display the View Routing History page. This page provides an audit trail of routing events for the OA, including the date and time of the event, action that triggered the event, and the event description.

9.6 View the Routing Path

When an OA 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 OA. Click the **View Routing Path** link to display the View Routing Path page, which allows you to view the approval path for the OA and, if allowed, make minor changes.

The View Routing Path page lists all of the steps in the approval path for the open 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 OA 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 other require an approval.
- **Reserved By** – The name of the approver who is currently responsible for completing this step.

View Routing Path

Traveler Name: CARLOS GARCIA Open Authorization ID: OA43019 Open Authorization Status: Pending Approval

Routing Path

Delete	Step	Approver Pool	Approval Reason	Action	Reserved By	Pool Members
<input type="checkbox"/>	1	FUNDS APPROVER	All Open Authorizations	Approval		Select Pool Member...
<input type="checkbox"/>	2	AO APPROVER POOL	All Open Authorizations	Approval		Select Pool Member...

Save

Figure 19: View Routing Path — Open Authorization

9.6.1 Change the Approver

If the open 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 OA.

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.

10 Approving an Authorization Created Under an OA

Authorizations created under an open authorization inherit the approval status of the OA, as long as they conform to all of the properties and limitations of the OA. If the authorization does not conform to all of the properties and limitations, it is routed for approval.

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

10.1 Open Authorization Details

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

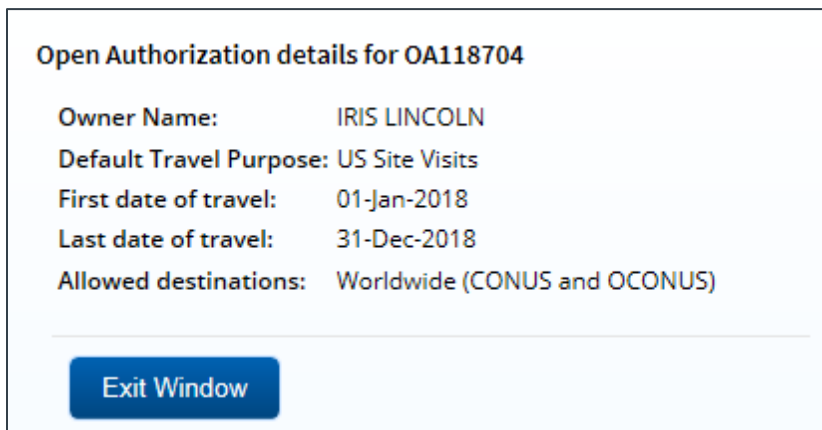


Figure 20: Open Authorization Details window

11 Revision History

Date	Description	Release
12/2021	Document creation	22.1

12 Trademark and Copyright

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