Creating Open Authorizations in E2

NOTE: Some open authorizations (OAs) are created in other USCG systems and automatically added to E2.

An open authorization (OA) allows you to make preapproved requests to travel over a specified period of time. An OA may be limited to specific locations or maximum costs, and can cover trips for up to one fiscal year.

See *UG60 – Creating Open Authorizations* for more detailed information on this process.

1. Click **My E2** on the task bar.
2. Select *Create Open Authorizations* from the **Start a Travel Document** list.

Figure 1: Start a Travel Document — Create Open Authorization option

3. Click **Go**.

Completing Basic Information

1. Enter or select the following:
   - Open authorization purpose
   - First day of travel/Last date of travel
   - Allowable types of travel
2. Click **Save and Next Step**.

Completing Travel Details

Use the Open Authorization Travel Details page to select your allowed destinations, sites, and transportation modes.
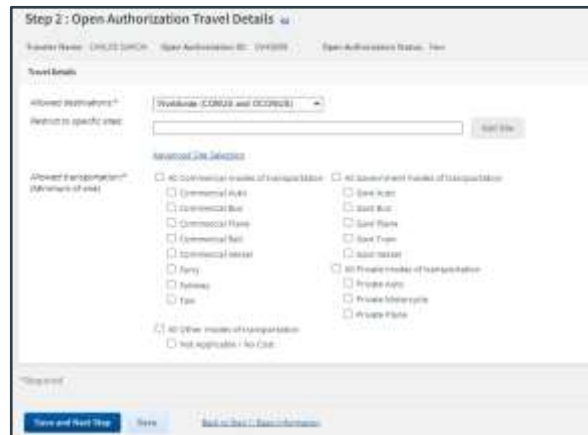

Figure 2: Open Authorization Travel Details page

1. Select the **Allowed destinations** from the list. What you select here will limit the sites you can select.
2. (Optional) Choose one or more of the methods listed below to further restrict travel to specific locations or all locations within a state or country.
3. Select at least one **Allowed transportation** model. Selecting any of the **All** check boxes allows all types under that selection.
4. Click **Save and Next Step**.

ONE or SEVERAL SITES

Complete the following steps to restrict travel to one or several sites.

1. Enter the first few letters (at least three) of the site name in the **Restrict to specific sites** field. E2 generates a list of all sites within the allowed destinations that match you entry.
2. Click the name to select it. The name appears in the **Restrict to specific sites** field and the **Add Site** button becomes enabled.
3. Click **Add Site**.
4. Repeat steps 1–3 for all sites you want to add. You can also delete a site if needed.

SITES within a STATE

Complete the following steps to restrict travel to specific sites within a state in the United States.

1. Click the **Advanced Site Selection** link. The Site Selection window displays with the **Search for Location** tab selected.
2. Select the **State** from the list.
3. (Optional) To further limit your search results, enter at least one character of the **Site** name, and then click **Search**. All sites starting with the entered character(s) display in the search results.
4. Click the check box for each site you want to select.
5. Click **Select and Close**.

ALL SITES within a STATE

Complete the following steps to restrict travel to all sites within a state in the United States.

1. Click the **Advanced Site Selection** link. The Site Selection window displays with the **Search for Location** tab selected.
2. Click the **Advanced Site Selection** tab.
3. Select the **State** from the list.
4. Click **Add all sites in State**.

SITES within a COUNTRY

Complete the following steps to restrict travel to specific sites within a country.

*TIP: American Samoa, Guam, Johnston Atoll, Midway Islands, Northern Marianas Islands, Puerto Rico, Virgin Islands (U.S.), and Wake Island display as countries in the Site Selection window. Use the **Country** list to select these locations.*

1. Click the **Advanced Site Selection** link. The Site Selection window displays with the **Search for Location** tab selected.
2. Select a **Country** from the list.
3. Click **Search** to display a list of available sites in the country.
4. Click the check box for each site you want to select.
5. Click **Select and Close**.

ALL SITES within a COUNTRY

Compete the following steps to restrict travel to all sites within a country.

1. Click the **Advanced Site Selection** link. The Site Selection window displays with the **Search for Location** tab selected.
2. Click the **Advanced Site Selection** tab.
3. Select a **Country** from the list.
4. Click **Add all sites in Country**.

SITE not in SEARCH RESULTS

Complete the following steps to restrict travel to a site that does not appear in the search results.

TIP: Only per diem sites appear in the search results list. If the site for which you are searching is not a per diem site, you will need to enter the site location.

1. Click the **Advanced Site Selection** link. The Site Selection window displays with the **Search for Location** tab selected.

Figure 3: Site Selection – Search for Location tab

2. Select a **Country** from the list.
3. Select a **State** from the list. (This field is required if the site is in the United States.)
4. Click **Search**.
5. Scroll to the bottom of the list.
   - If the county in which your site is located appears on the list, select it, and then click **Select and Close**.

- If the country is not listed, select *Standard Rate*, and then click **Select and Close**.
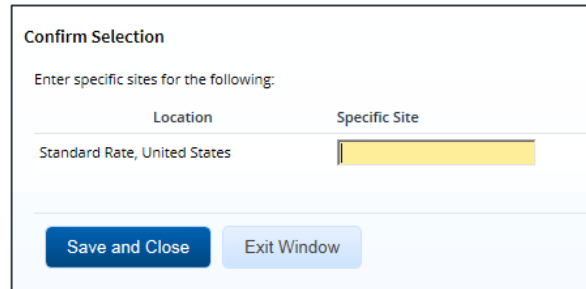- Select *Other*, and then click **Select and Close**. The Confirm Select window displays.

Figure 4: Confirm Selection – Standard Rate, Specific Site field

6. Enter the **Specific Site** name.
7. Click **Save and Close**.

Completing Expense Details

Use the Open Authorization Expenses page to limit the expenses related to the OA. Trips exceeding maximum expense levels may require additional approval.

1. Enter the **Per trip expense limit**. This is the maximum expense amount allowed per trip.
2. Enter the **Total OA expenses limit**. This is the maximum amount for all combined trips under the OA.
3. Complete the "Allow travel advances" section.
4. Complete the "Allow reimbursement types" section.
5. Click **Save and Next Step**.

Completing Accounting

Your Funds Manager will add the POET lines to fund the OA during the approval process. Travelers and arrangers can skip this step by clicking **Save and Next Step**.

Completing the Summary

The Summary page displays your open authorization information.

1. Review the OA
   - Click the **Edit Details** link in a section header to return to that step and make changes.
   - Be sure to save any changes before returning to the Summary page.
2. Click **Send to Approver**.