



Creating Group Authorizations

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

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

Process Overview

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

Completing the Basic Information Step

Figure 1: Group Authorization Basic Information page

1. Select the **Type of Travel** from the list.
2. Enter a **Specific Travel Purpose**.
3. Click **Save and Next Step**.

Completing the Site Details Step

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

Figure 2: Group Authorization Site Details page

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

Completing the Travelers Step

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

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

Figure 3: Group Authorization Travelers page

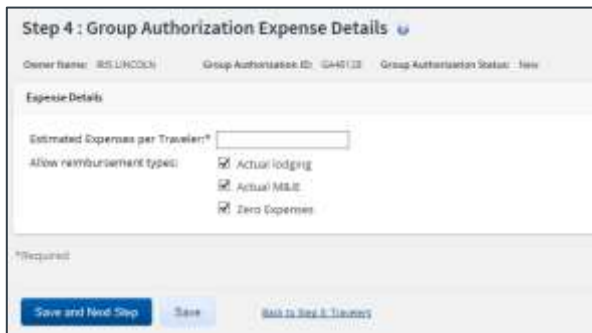
1. Click the **Select Travelers** link.
2. Enter your search criteria.
3. Click **Search**.
4. Select each traveler to add to the GA.
5. Click **Save**.
6. Repeat steps 2–5 until you are finished selecting travelers.
7. Click **Save and Close**.

Figure 4: Group Authorization Travelers — Selected Travelers

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

Completing the Expense Details Step

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



The screenshot shows the 'Step 4: Group Authorization Expense Details' page. At the top, it displays 'Owner Name: JES LINDICH', 'Group Authorization ID: GA45133', and 'Group Authorization Status: New'. The 'Expense Details' section includes a text input for 'Estimated Expenses per Traveler:' and a list of 'Allow Reimbursement Types' with checkboxes for 'Actual Lodging', 'Actual Mile', and 'Zero Expenses'. A 'Required' section is visible below. At the bottom, there are three buttons: 'Save and Next Step', 'Save', and 'Back to Step 3: Itinerary'.

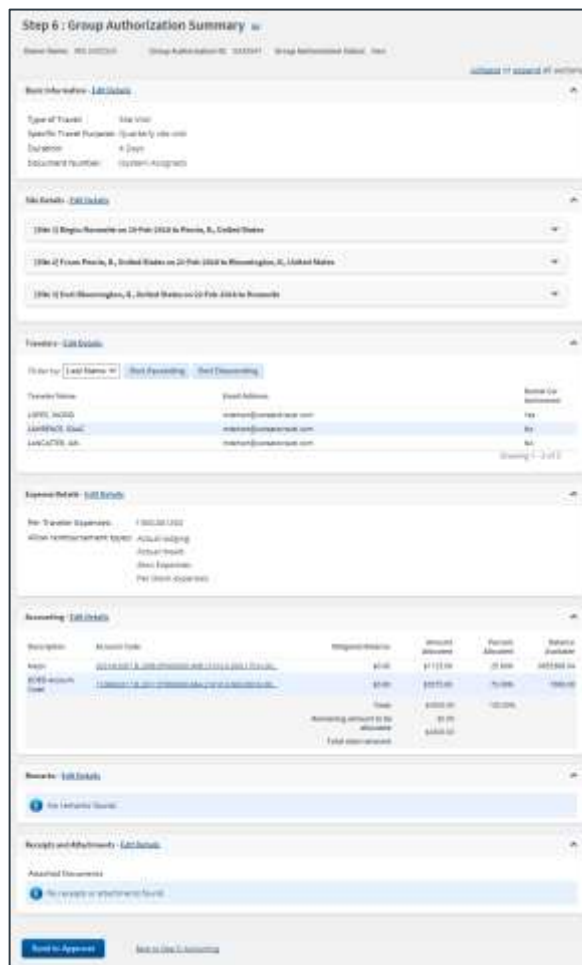
Figure 5: Group Authorization Expense Details page

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

Completing the Accounting Step

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

Completing the Summary Step



The screenshot shows the 'Step 6: Group Authorization Summary' page. It features several sections: 'Basic Information', 'Itinerary', 'Traveler', 'Expense Detail', 'Accounting', 'Recovery', and 'Receipts and Payments'. The 'Expense Detail' section includes a table with columns for 'Per Traveler Expense', 'Allow Reimbursement Type', 'Actual Lodging', 'Actual Mile', 'Zero Expenses', and 'Per Diem Expense'. The 'Accounting' section contains a table with columns for 'Description', 'Account Code', 'Integration Code', 'Amount', 'Person Account', and 'Status'. At the bottom, there are buttons for 'Send to Approver' and 'Back to Step 5: Accounting'.

Figure 6: Group Authorization Summary page

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

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

Release 22.1 – February 2022

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