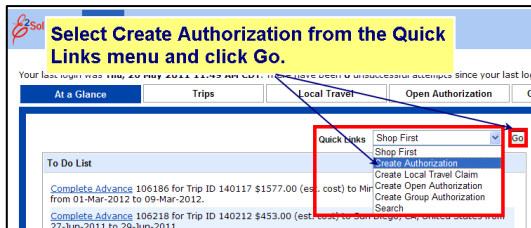## e2Solutions®

Creating Authorizations Quick Reference Card

Creating an authorization in E2 Solutions (E2) allows you to make a request to travel.

See **UG25 Creating Authorizations** for more detailed information.

1. Click **My E2** on the task bar and then select **Create Authorization** from the **Quick Links** list.

Quick Links menu

2. Click **Go**.

3. If no open or group authorizations (OAs or GAs) exist, skip to **Completing Basic Information**. If an OA or GA exists, the **Authorizations Exist** window appears.

   a. Select an OA or GA to use from the **OA or GA selection** list. (Use the default value "Do not use an available authorization" to start a new authorization, not based on an OA or GA.

   b. Click **Create Trip**. (As you complete the authorization, your choices are limited to those allowed by the OA or GA.)

4. Click **Complete Trip Authorization** on the Summary page. The authorization will inherit the approval status of the OA or GA as long as it is within the OA or GA limitations.

Completing Basic Information

1. Enter the following on the Basic Information page:

   - Type of Travel
   - Specific Travel Purpose
   - Document Number (if manual document numbering is enabled)

2. Click **Save and Next Step**.

Completing Reservations

Use the Reservation page to:

- Review reservations associated with the authorization
- Make online flight, rental car, rail and hotel reservations
- Associate reservations with an authorization
- Retrieve reservations made for you by the Travel Management Center (TMC)

1. Review or make reservations.

   - If no reservations are associated with the authorization and you want to skip the reservation process, or if you have no actions available to you, click **Next Step** to continue.
   - To make an online reservation now, click the **Make New Reservations** link. After you purchase your trip, you return to a refreshed Reservations page displaying your reservation details.

- If you made reservations using Shop First and chose to create an authorization after completing the purchase, the Reservation page displays the reservation details.
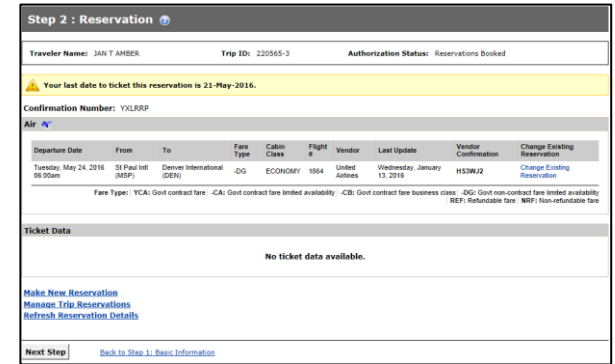
Reservation page with PNR data

- If you made reservations using Shop First and chose to save the reservation for later, click the **Manage Trip Reservations** link to view all available reservations and select one or more to associate with the authorization. The Reservation page is blank until reservations are associated with the authorization.
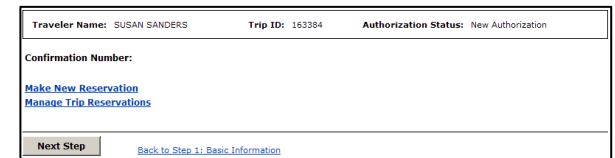
Reservation page with no reservations

- If you contacted your TMC for reservations or made reservations online that were sent to a travel agent, click the **Manage Trip Reservations** link. You need the confirmation number provided by your travel agent to retrieve the reservation and associate it with the authorization.

2. Click **Next Step**.

Completing Site Details

Use the Site Details page to select your trip per diem locations or, if you do not have associated reservations, to provide travel details.

- If the authorization has associated reservations, the information on this page reflects the reservations details. You should review and verify that the per diem location is accurate.
- If you do not have or require reservations, or if the existing information is incorrect:
  1. Complete the **Begin** information fields.
  2. Complete the **End** information fields.
  3. Click **Save and Next Step**.
- Under certain circumstances, you may want to add a break to your trip.
  1. Click **Add Break**. This will add a break between your beginning and ending destinations. The Add Break section appears.
  2. Verify or change the **Break** information.
  3. Verify or change the **Return from Break** information.
  4. Click **Save and Next Step**.
- Under certain circumstances, you may want to add another site to your trip.
  1. Click **Add Site**. This will add a site between your beginning and ending destinations. The Add Site section appears.
  2. Verify or change the existing information.
  3. Click **Save and Next Step.**

Completing Expenses

Use the Expenses page to review and update estimated expenses for the trip including:

- Lodging expenses for each site, including reimbursement types.
- Meals and incidental expenses (M&IE) for each site, including reimbursement types.
- Adding additional estimated expenses.

Reimbursement type selection is available for both estimated lodging and estimated M&IE. Be sure to review **both**.

1. Review your estimated expenses. If you have an associated reservation, the fields on this page reflect the information from the reservation, and include airfare, rail, and lodging expenses (if applicable).

   If you do not have an associated reservation, the lodging rates and the meals and incidental expenses are based on the per diem rates for the sites on your trip.

   - Click the **Modify** link to edit the expense.
   - Click the **Copy** link to copy the expense to another date.
   - Click the **Delete** link to remove an estimated expense.
   - Click the **Show** link to view expense details. (This link appears when you cannot update the information.)
   - Click the **Add New Expense** link to add another estimated expense to the authorization.

2. Click **Next Step**.

Completing Accounting Information

Use the Accounting page to select the accounts to fund your trip.

If you do not normally select funding sources for your travels, skip this step and click **Save and Next Step**.

1. Review the accounts selected to fund your trip.
   - Click the **Delete** link to remove the account from the authorization.
   - Click the **Select Account Codes** link to select accounts to fund your trip.
   - Click the **Split Funding** link if you have multiple accounts to fund the trip and you want to identify specific funding sources with specific expenses or travel dates.
2. Click **Save and Next Step**.

Completing Travel Policy Information

This page displays items that may be outside your agency's travel policy. If an item is out of policy, you need to select a reason to justify the out of policy choice.

Completing the Summary step

The Summary page displays a summary of your travel authorization information.

1. Review the authorization. Click the **Edit Details** link in the section header to return to that step to make changes.
2. Click **Send to Approver** or **Complete Trip Authorization** (if trip is under an OA or GA).