**MANAGING TRIP RESERVATIONS**

(most commonly used if a document in E2 was created under the wrong minor customer)

1. **Unapproved travel authorization with reservations**

You will not lose your reservations if the following these steps are completed. If the authorization has been sent for approval you can **RECALL** the document.

1. Pull up Trip A. and Show
2. Go to the Reservation Step
3. Click **Manage Trip Reservations**
4. On the Right, **Click Remove** which will remove the reservation from the trip.
5. Go back to your Trips list.
6. Create a new travel authorization by **copying the old Trip ID, enter the start date of the trip,** when you get to the Reservation Step
7. Click **Manage Trip Reservations** at the bottom
8. **Select the confirmation number** for the trip **by checking the select box** and then Select and Close.  This will add the reservation into the new authorization
9. The Travel Expenses on the original Authorization will copy to the New Authorization you will need to add any attachments that were on the original authorization.
10. Add in the Accounting Code by Searching and Selecting or choosing a Favorite LOA
11. Follow all steps and send for approval.
12. After the new authorization is sent for approval, go back and cancel the old authorization.
13. **If the Authorization is approved, you can follow these instructions below**

Show Authorization, Go to Trip Dashboard

Under Extras click on Cancel Trip

Confirm action box will pop up

**File Expenses:** choose either a or b

* 1. I don’t have any expenses to claim cancel my trip or
  2. I am no longer traveling but have expenses to claim

**Delete Reservations**: choose either c or d

* 1. Delete the Reservations (only if you want to rebook)
  2. Move the reservations to my held reservations list. (choose this one if you want to keep your reservations)

The old authorization is now cancelled and your reservation is in your Show Held Reservations list for future use.

From your trips list find the cancelled authorization and copy it, or you can create a brand new authorization. (instructions are the same for copying or creating a new authorization starting at Step 2 Reservations)

If you copy the cancelled trip enter your start date (it can be the same as the old authorization) everything should copy over except the LOA and any attachments, those can be retrieved from the old authorization

Reservation Step 2-

1. click on Manage Trip Reservations
2. Select the confirmation number for the reservation of this trip then select and close

Your reservations have now populated in the reservation step of your document

1. Save and Close

Follow each step to verify or add more expenses and add any attachments and Line of Accounting as you go through the steps and then send for approval.

1. **Trip Already taken Place, please use this set of instructions**

If the trip has already taken place you will not be able to remove and plant reservations, but you can enter the airfare /rental car in as an expense on the copied document. After a document is copied you will need to upload any attachments that were on the previous document and add the line of accounting.

1. Pull up old Trip and Show document, print or save any attachments on the voucher and write down the LOA.
2. Go back to your Trips List and then Copy this authorization, it will ask you for the start date.
3. Follow the steps
4. When you get to the Reservation step you can bypass it.
5. Your Expenses should have copied over (except possibly airfare and rental car), you will need to add these expenses in at this time.
6. Add in the Accounting Code by Searching and Selecting or using the Favorite LOA.
7. Follow all steps and send for approval again.