*informs*

**Miami-Dade County**

# Travel Authorization Job Aid

**Version 1.0**

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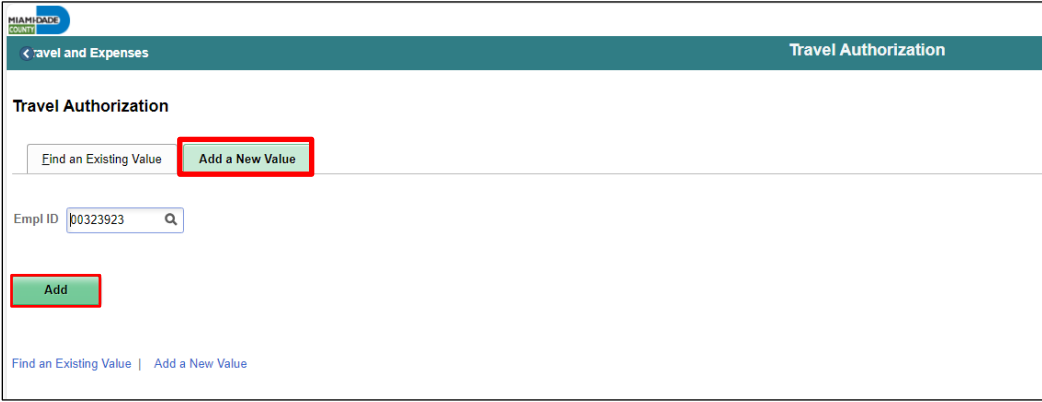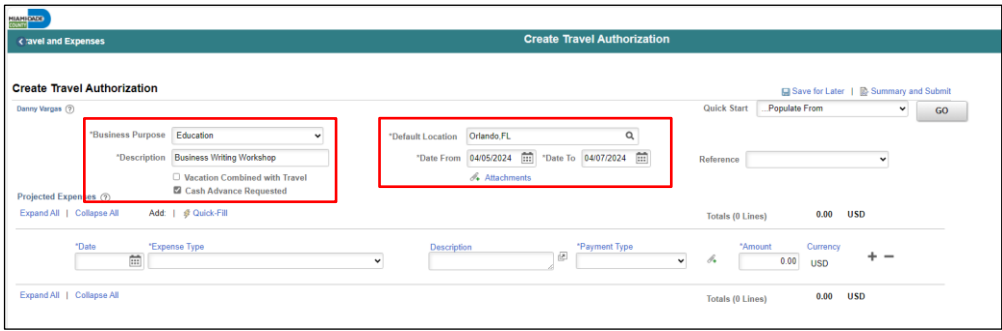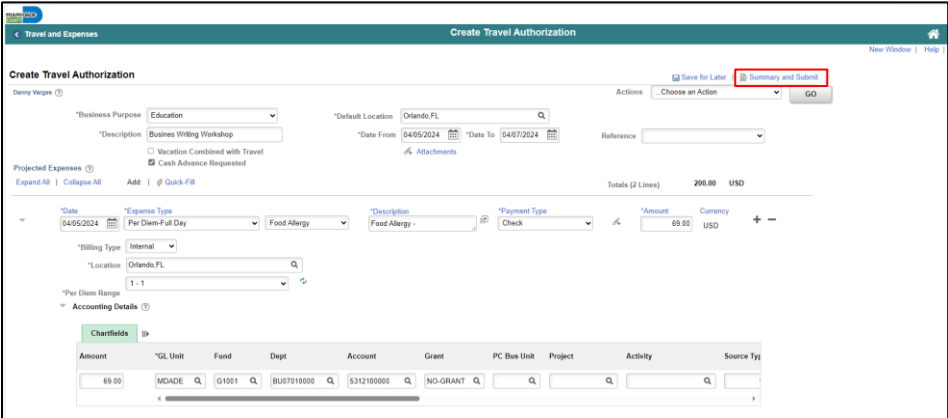
## PURPOSE

This document provides instructions on how to create a travel authorization. This document is for all employees.

# CREATE A TRAVEL AUTHORIZATION

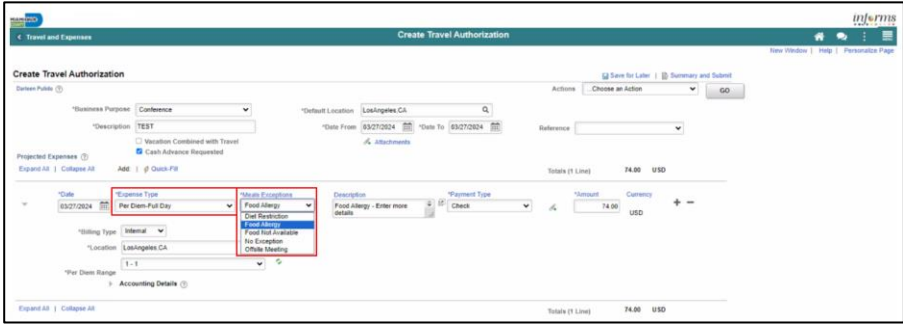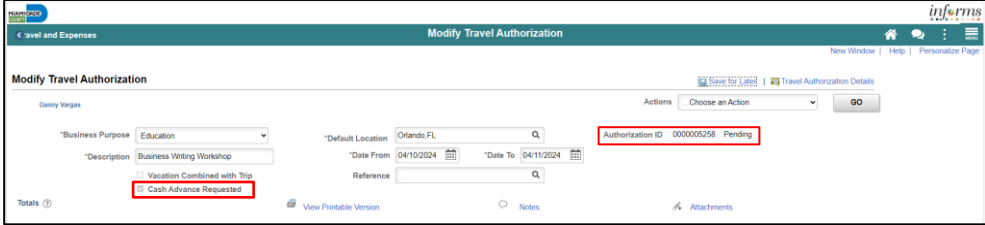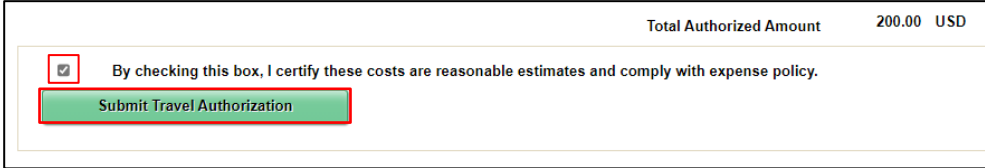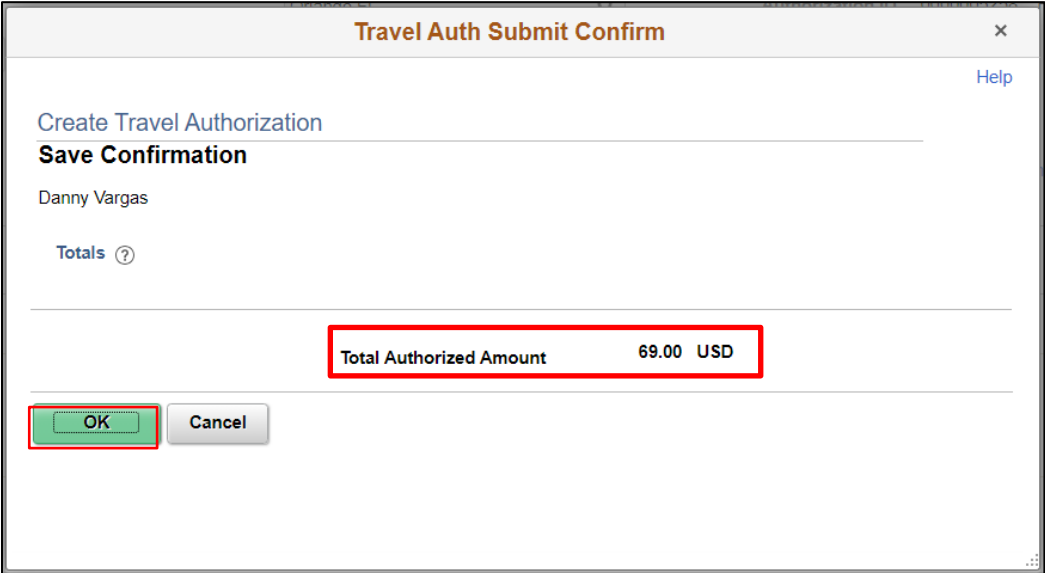| Step | Action |
|------|--------|
| 1. | Navigation: **Log in to INFORMS > Employee Self-Service > Travel and Expenses > Create a Travel Authorization** |
| 2. | Select **Add New Value** and enter the **Employee ID**. Finally, select **Add**:  |
| 3. | Complete the Travel Authorization header (fields with an asterisk are required fields): <br>• Select an appropriate **Business Purpose** from the dropdown menu options <br>• Enter your travel authorization **Description** <br>• Select **Default Location** from the dropdown menu options <br>• Select travel dates <br>• If applicable, select the **Cash Advance Requested** check box and / or **Vacation Combined with Travel** Check box <br>• Use the **Attachments** link to attach documents to your request <br><br>**Note:** The **Reference** field introduces additional workflow approvals and should be left blank unless one of the predefined selections apply.  |

| Step | Action |
|------|--------|
| 4. | Complete **Projected Expenses** that apply to your travel - Per Diem Meals<br><br>When **Per Diem-Full Day** or **Per Diem-First and Last Day** are selected, a **Meal Exceptions** dropdown Menu will appear to give employees the option to specify any meal exceptions they may have.<br><br> |
| 5. | Enter **Projected Expenses** that apply to your travel then select **Save for Later**. |
| 6. | Review header detail information, review **Projected Expenses** including the **Accounting Detail** lines associated with each expense, **Payment Type** and **Amount**. Select **Summary and Submit** to submit.<br><br> |

| Step | Action |
|------|--------|
| 7. | Record your **Authorization ID** and ensure that the **Cash Advance Requested** flag is selected (if applicable).<br><br><br><br>Check the reasonable estimation certification box. Then select **Submit Travel Authorization.**<br><br> |
| 8. | A pop-up box will appear to request confirmation of your travel authorization. Review the **Total Authorized Amount** and select **OK**.<br><br> |

| Step | Action |
|------|--------|
| 9. | The Travel Authorization Document has been submitted for approval. Verify submission.<br><br>Select **Refresh Approval Status** to view approval history.<br><br> |