

## **Miami-Dade County**



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## **Create a Travel Delegate Job Aid**

**Course ID: FIN 214**

**Course Title: Travel Authorization**

***Updated 01-30-2025***

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## PURPOSE AND DESCRIPTION

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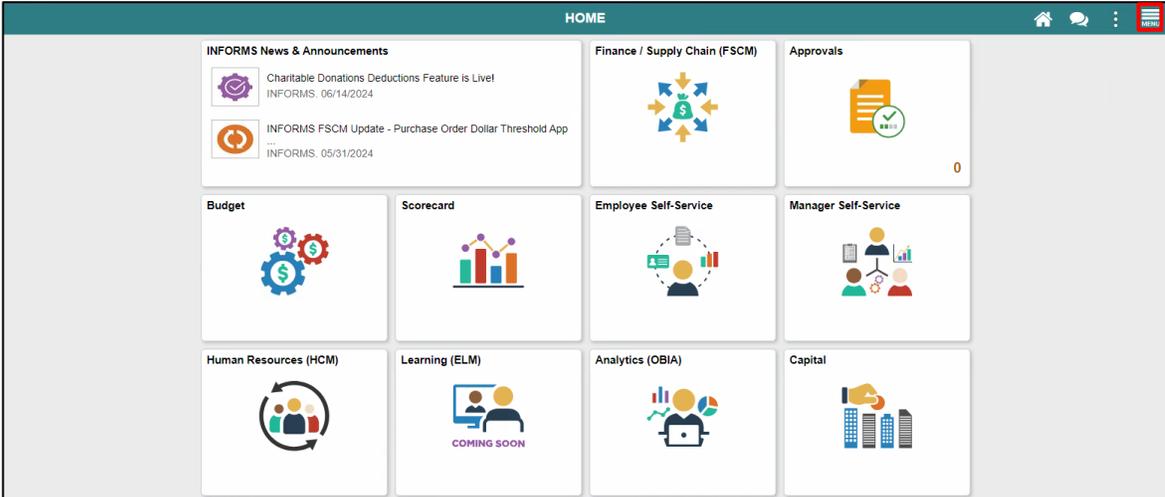
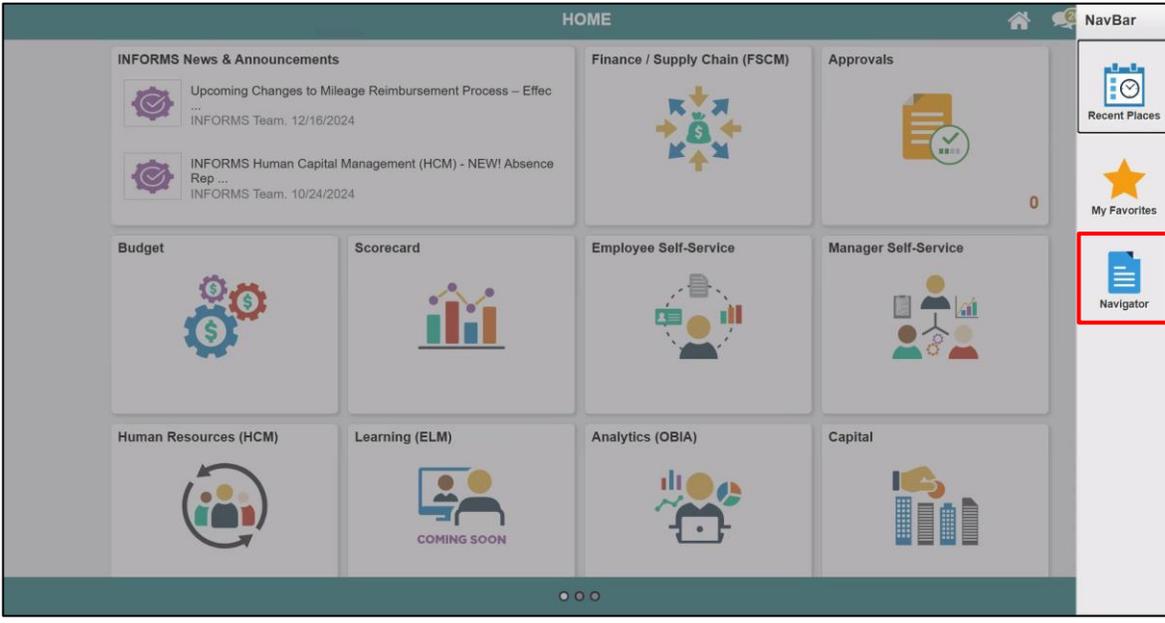
### **Purpose**

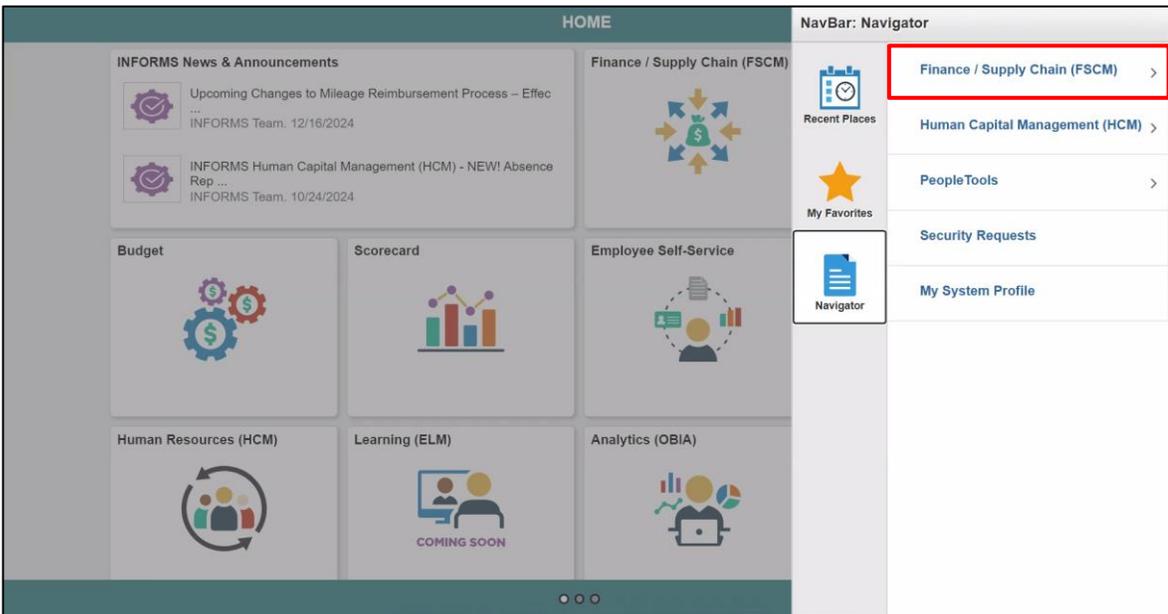
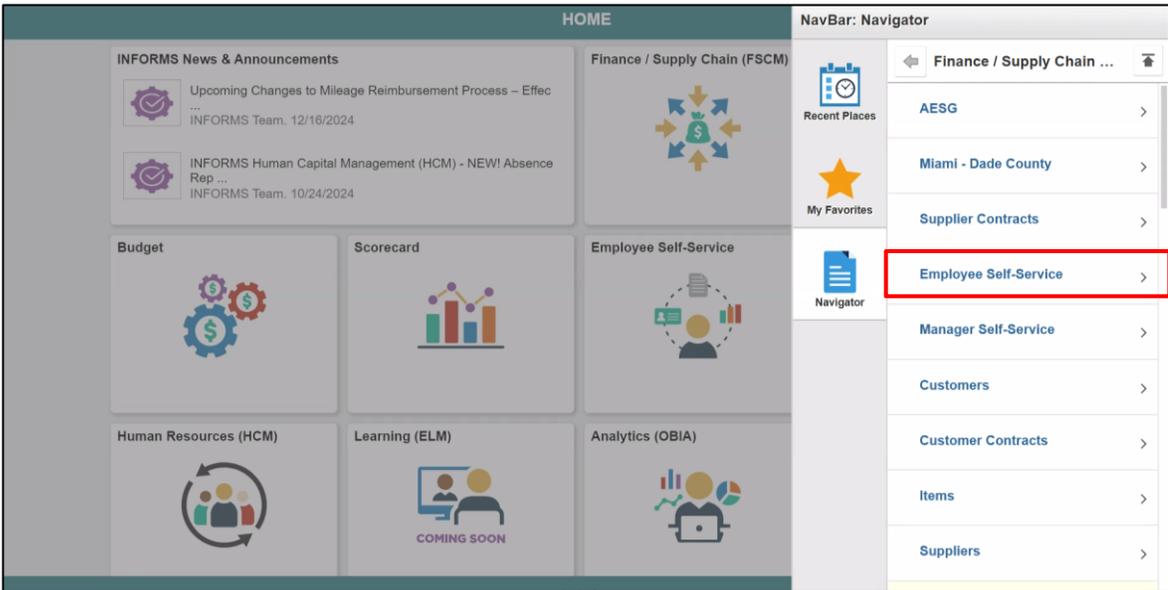
This job aid explains the key activities involved in creating a Travel Delegate. It provides an overview of the sub-processes involved, as well as step-by-step procedural guidance to perform the activity.

### **Key Points**

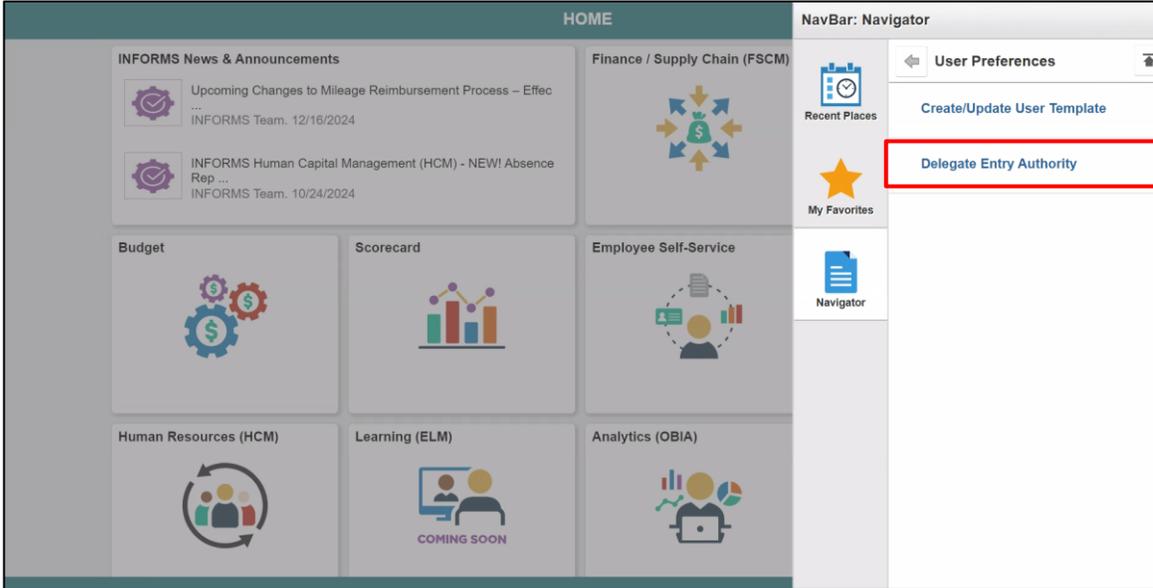
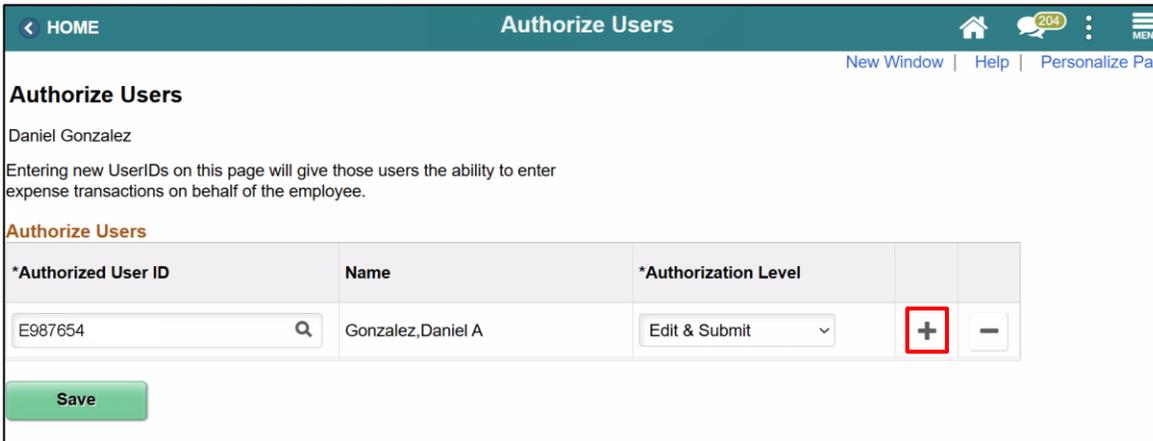
- A Travel Delegate is an employee whom you (the traveler) authorize to create Travel Authorizations on your behalf.
- Your Travel Delegate can generate and save your Travel Authorizations but cannot submit them.

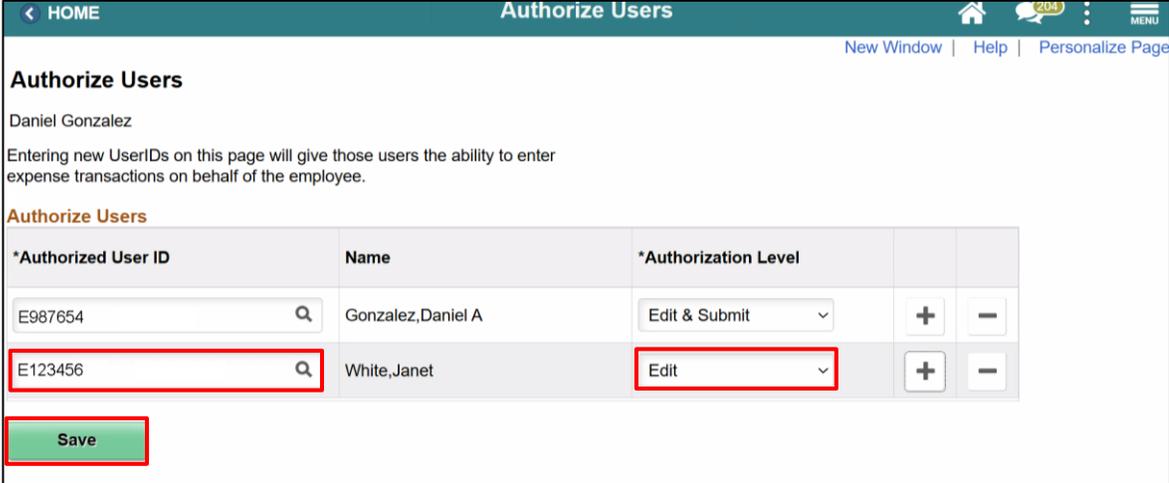
## CREATE A TRAVEL DELEGATE

Step	Action
1.	<p>Log into INFORMS and select <b>Menu</b> from the home landing page below.</p> 
2.	<p>Select <b>Navigator</b>.</p> 

Step	Action
3.	<p>Select <b>Finance/Supply Chain</b>.</p> 
4.	<p>Select <b>Employee Self-Service</b>.</p> 

Step	Action
5.	<p><b>Select Travel and Expenses.</b></p> <p>The screenshot shows the INFORMS Home dashboard. On the right side, there is a 'NavBar: Navigator' menu. The 'Employee Self-Service' option is selected, and the 'Travel and Expenses' link is highlighted with a red box. Other visible options in the sidebar include Procurement, Employee Project Center, and Travel and Expense Center. The main dashboard area contains various widgets for News &amp; Announcements, Finance / Supply Chain (FSCM), Budget, Scorecard, Employee Self-Service, Human Resources (HCM), Learning (ELM), and Analytics (OBIA).</p>
6.	<p><b>Select User Preferences.</b></p> <p>The screenshot shows the INFORMS Travel and Expenses page. On the right side, there is a 'NavBar: Navigator' menu. The 'Travel and Expenses' option is selected, and the 'User Preferences' link is highlighted with a red box. Other visible options in the sidebar include Expense Reports, Time Reports, Travel Authorizations, Cash Advances, Review Payments, Review Expense History, and Review/Edit Profile. The main dashboard area contains various widgets for News &amp; Announcements, Finance / Supply Chain (FSCM), Budget, Scorecard, Employee Self-Service, Human Resources (HCM), Learning (ELM), and Analytics (OBIA).</p>

Step	Action
7.	<p>Select <b>Delegate Entry Authority</b>.</p> 
8.	<p>Select the plus sign “+” icon.</p> 

Step	Action
9.	<p>a. <b>Authorized User ID:</b> Enter the Employee ID of the person you want to name as your Travel Delegate.</p> <p>b. <b>Authorization Level:</b> Select “Edit” from the drop-down options.</p> <p>c. Select <b>Save</b>.</p> 
10.	<p>Select <b>OK</b>.</p> 

Step	Action															
11.	<p>Select <b>Home</b>.</p> <p>The screenshot shows the 'Authorize Users' interface. At the top, there is a navigation bar with a home icon (highlighted with a red box), a user profile icon, and a menu icon. Below the navigation bar, the page title 'Authorize Users' is displayed. The user 'Daniel Gonzalez' is identified. A message states: 'Entering new UserIDs on this page will give those users the ability to enter expense transactions on behalf of the employee.' Below this, there is a table with the following data:</p> <table border="1"> <thead> <tr> <th>*Authorized User ID</th> <th>Name</th> <th>*Authorization Level</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>E987654</td> <td>Gonzalez, Daniel A</td> <td>Edit &amp; Submit</td> <td>+</td> <td>-</td> </tr> <tr> <td>E123456</td> <td>White, Janet</td> <td>Edit</td> <td>+</td> <td>-</td> </tr> </tbody> </table> <p>A green 'Save' button is located at the bottom left of the table area.</p>	*Authorized User ID	Name	*Authorization Level			E987654	Gonzalez, Daniel A	Edit & Submit	+	-	E123456	White, Janet	Edit	+	-
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