



Miami-Dade County

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# Travel Authorization Job Aid

Version 1.0

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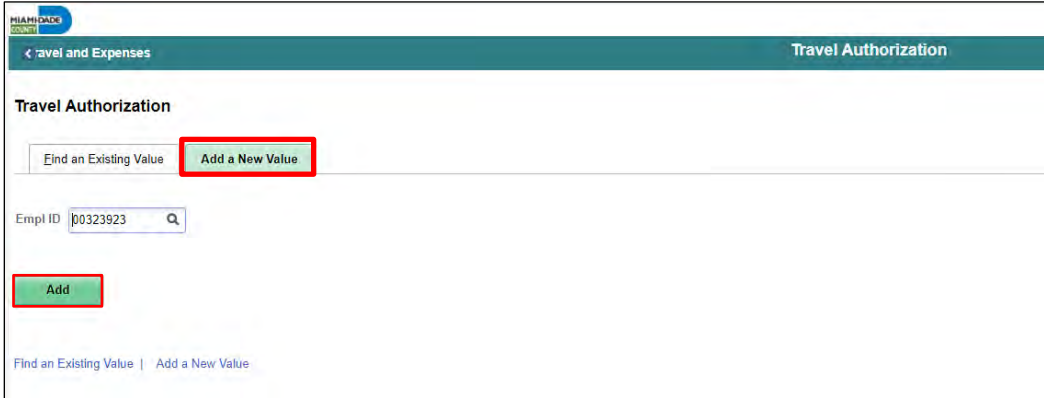
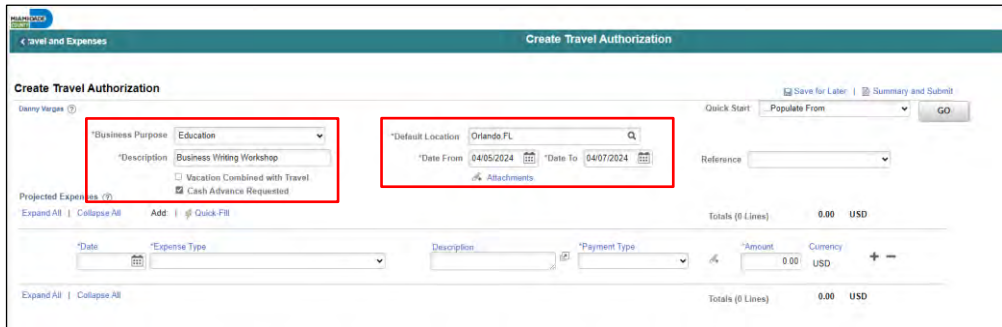
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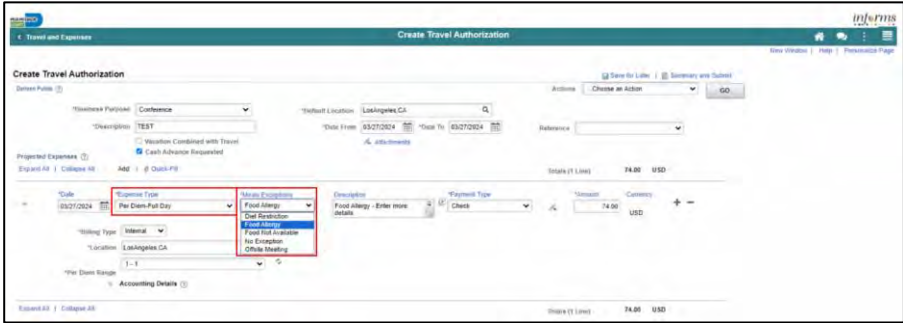
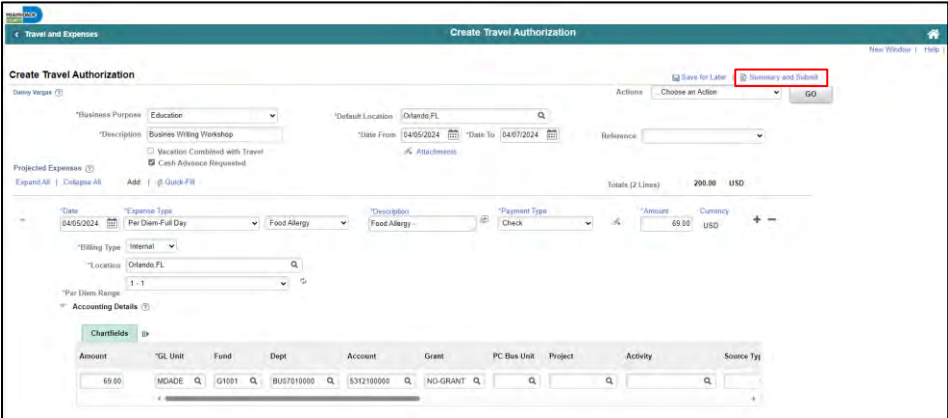
## PURPOSE

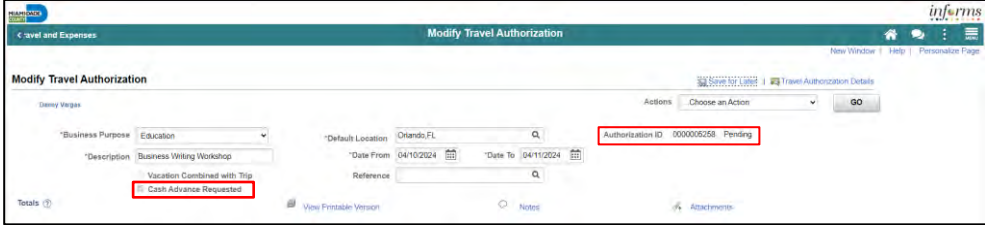
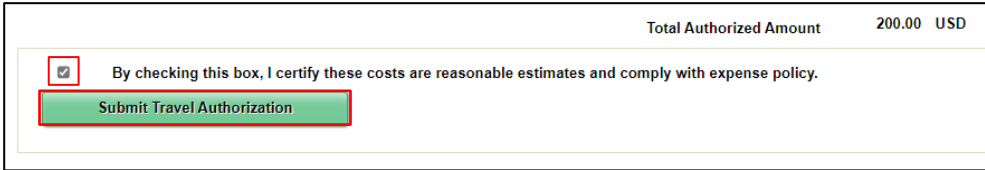
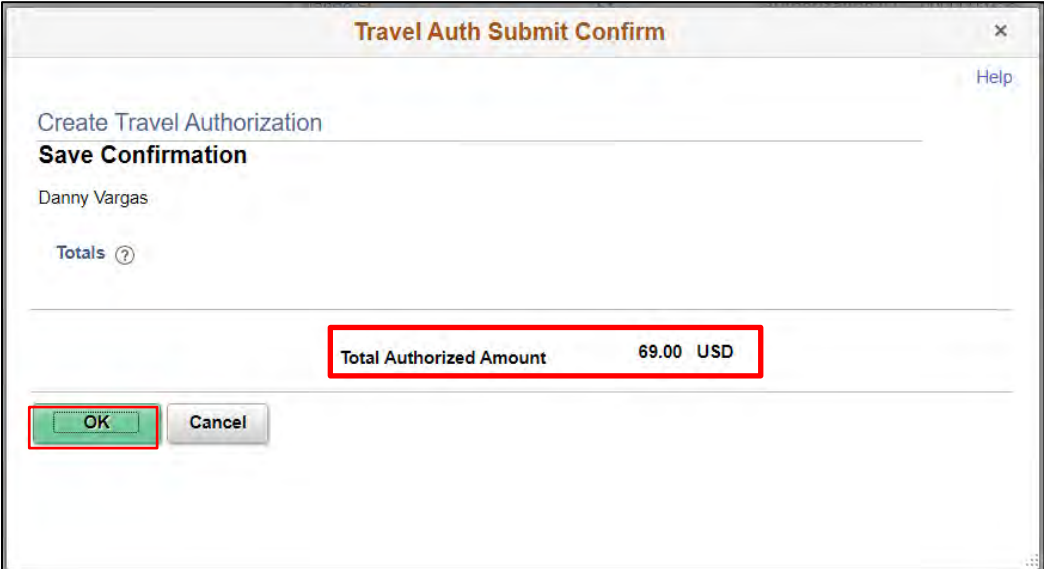
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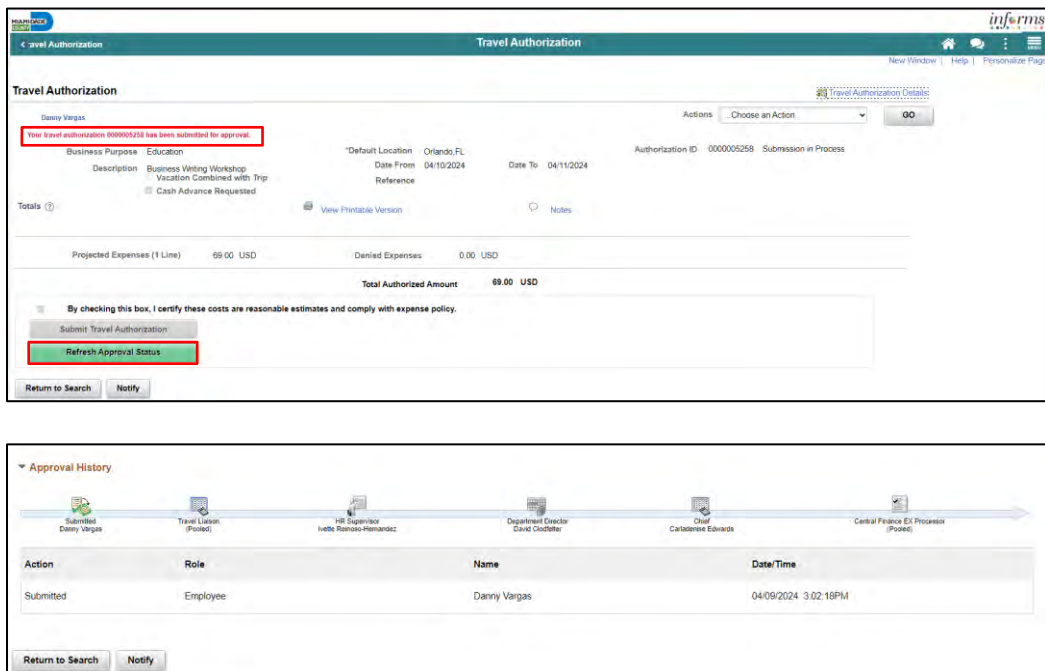
This document provides instructions on how to create a travel authorization. This document is for all employees.

## CREATE A TRAVEL AUTHORIZATION

Step	Action
1.	Navigation: <b>Log in to INFORMS &gt; Employee Self-Service &gt; Travel and Expenses &gt; Create a Travel Authorization</b>
2.	<p>Select <b>Add New Value</b> and enter the <b>Employee ID</b>. Finally, select <b>Add</b>:</p> 
3.	<p>Complete the Travel Authorization header (fields with an asterisk are required fields):</p> <ul style="list-style-type: none"> <li>• Select an appropriate <b>Business Purpose</b> from the dropdown menu options</li> <li>• Enter your travel authorization <b>Description</b></li> <li>• Select <b>Default Location</b> from the dropdown menu options</li> <li>• Select travel dates</li> <li>• If applicable, select the <b>Cash Advance Requested</b> check box and / or <b>Vacation Combined with Travel</b> Check box</li> <li>• Use the <b>Attachments</b> link to attach documents to your request</li> </ul> <p><b>Note:</b> The <b>Reference</b> field introduces additional workflow approvals and should be left blank unless one of the predefined selections apply.</p> 

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

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

Step	Action
9.	<p>The Travel Authorization Document has been submitted for approval. Verify submission.</p> <p>Select <b>Refresh Approval Status</b> to view approval history.</p>  <p>The screenshot displays the 'Travel Authorization' form for Danny Vargas. A red box highlights the message: 'Your travel authorization 0000005258 has been submitted for approval.' Below this, the form shows details like Business Purpose (Education), Description (Business Writing Workshop), and Dates (04/10/2024 to 04/11/2024). The 'Totals' section shows a Projected Expense of \$9.00 USD and a Total Authorized Amount of \$9.00 USD. A red box highlights the 'Refresh Approval Status' button. Below the form, the 'Approval History' section shows a timeline of actions: Submitted (Danny Vargas), Travel Upload (Pooled), HR Supervisor (Ivette Ramoas-Ramirez), Department Director (David Colette), Chief (Catalense Edwards), and Central Finance EX Processor (Pooled). A table below the timeline shows the 'Submitted' action by 'Employee' Danny Vargas on '04/09/2024 3:02:18PM'.</p>