

Course ID: FIN 214  
Course: Travel & Expense: Travel Authorization

# Ground Rules



Be on time



Attendance



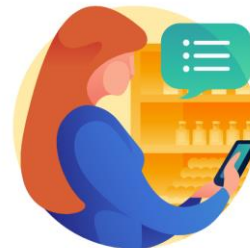
Turn off your cell phones when in class



Take breaks as needed



Participate actively in class; refrain from email and internet use



Feel free to ask questions

# Course Overview

<b>Course Description</b>	<p>This course provides a comprehensive review of the Travel Authorization processes.</p> <p>This course consists of the following modules:</p> <ul style="list-style-type: none"><li>• Module 1: Course Introduction</li><li>• Module 2: Travel Authorization</li><li>• Module 3: Course Summary</li></ul>
<b>Training Audiences</b>	<ul style="list-style-type: none"><li>• Employee</li><li>• Department Expense Liaison (Travel Liaison)</li><li>• Department Expense Approver (Employee ePar HR Supervisor)</li><li>• Department Expense Approver 2 (Department Director)</li><li>• Department Expense Approval Chief</li><li>• Central Expense Travel Processor</li><li>• Central Finance AP Travel Expense Approver</li></ul>
<b>Prerequisites</b>	<ul style="list-style-type: none"><li>• N/A</li></ul>
<b>Estimated Duration</b>	<ul style="list-style-type: none"><li>• 2 Hours</li></ul>

# Module 1: Course Introduction

## Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

Purpose and Benefits of the Business Process

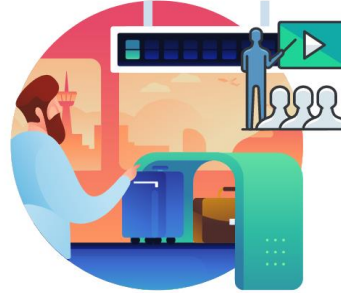
The End-to-End Business Process

Introduction to Demonstrations and Exercises

# Course Administration and Logistics



To receive credit for completing this course, Users must record your attendance at the beginning and end of class



Please turn off your cell phones and refrain from checking email and the Internet while in class



Actively participate in class



Take Breaks at scheduled times



Ask questions; this is your time to learn



Be back from Breaks on time

# Learning Objectives

- Create and submit Travel Authorization Overview
- Travel Authorization Workflow Overview Overview
- Maintain Travel Authorization Request

# Roles and Responsibilities

The following roles are associated with this course and will play a part in conducting the related business processes for the County:

Role	Responsibilities
<b>Expense Employee</b>	The Expense Employee Creates, Modifies and Submits Travel Authorization Requests and Expense Reports.
<b>Department Expense Liaison (Travel Liaison)</b>	This role is responsible for reviewing Travel Authorizations and Expense Reports to ensure the travel transactions adhere to the County's Travel Policy. Additionally, this role has the capability to create the Travel Authorizations and Expense Reports "on behalf of" the employee but will not be able to submit the transaction for approval.
<b>Department Expense Approver (Employee ePar HR Supervisor)</b>	The employee supervisor is responsible for reviewing/approving employee Travel Authorization and Expense Reports for the Department.
<b>Department Expense Approver 2 (Department Director)</b>	The Department Director is responsible for reviewing/approving Travel Authorization and Expense Reports for the Department.

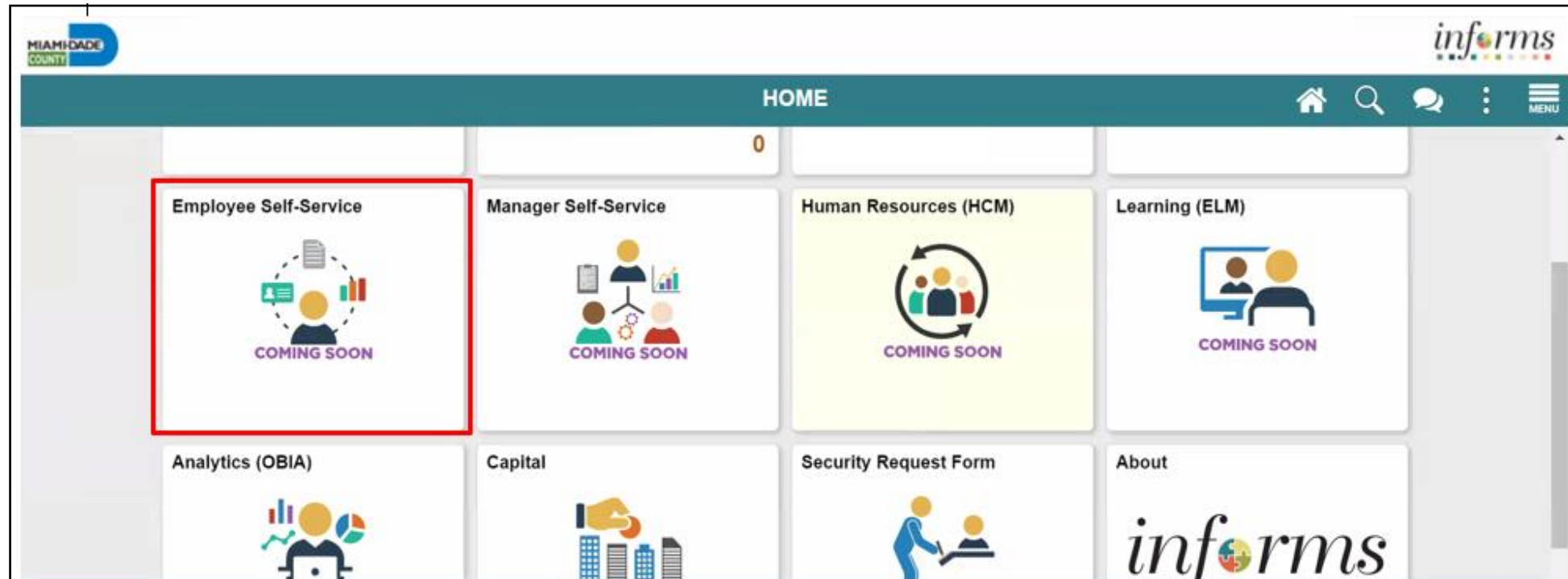
# Roles and Responsibilities, Continued

Role	Responsibilities
<b>Department Expense Approval Chief</b>	The Chief Approver is responsible for reviewing/approving travel authorization request.
<b>Mayor</b>	The Mayor is responsible for reviewing/approving the travel request for international, legislative and group travel (5+ travelers).
<b>Central Expense Travel Processor</b>	The Central Expense Travel Processor is responsible for reviewing/approving Travel Authorizations and Expense Reports. Ensures that the travel request adheres to County's Travel Policy. This role is also responsible for processing Travel Authorization, Cash advances as requested.
<b>Central Finance AP Travel Expense Approver</b>	The Central Finance AP Travel Expense Approver is responsible for Reviewing and Approving Cash advances.



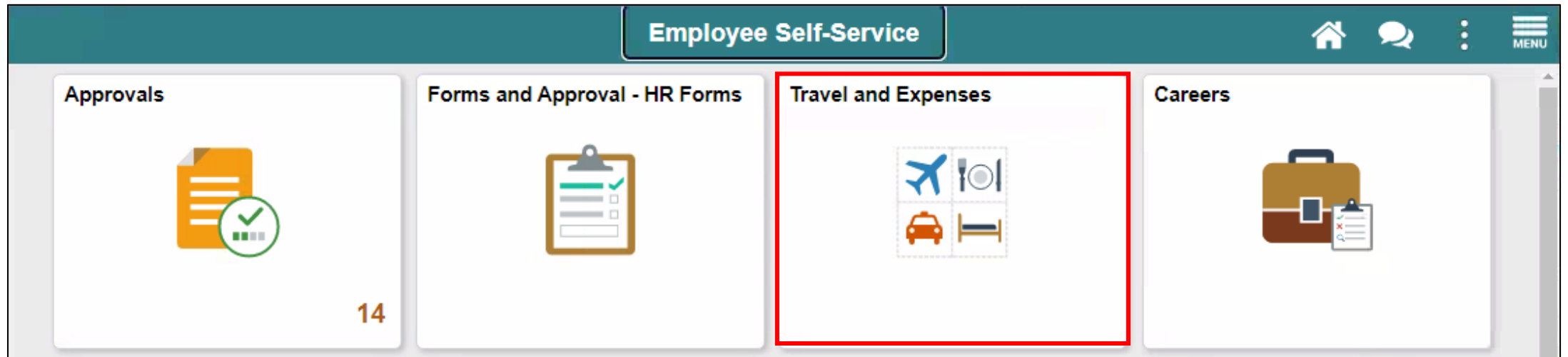
# Navigation

1. Login to **INFORMS** and select **Employee Self-Service** from the home landing page below.



# Navigation, Continued

## 2. Select **Travel and Expenses**.



# Navigation, Continued

## 3. Select **Create Travel Authorization**.



# Purpose and Benefits

The purpose and benefits of the Travel Authorization business process include:

- Introducing the Application of INFORMS to end-user
- Create and Submit Travel Authorization Overview
- Understanding the Travel Authorization Workflow Overview Overview (Approve, Denied, Pushback)
- Maintaining the concept and processes of Travel Authorization
- Automation of process
- Transparency and accessibility to the transactions and supporting documentation

# End-to-End Business Process

## TRAVEL AUTHORIZATION BUSINESS PROCESS

### Department Employee



### Department Employee

The Employee is responsible for preparing and submitting Travel Authorizations.

### Department Travel Compliance Review



### Travel Liaison

Department compliance role responsible for preparing/reviewing, and approving Travel Authorizations. Ensures that travel request adheres to County Travel Policy and Procedures Manual.

### Review/Approve Employee Travel Request



### Supervisor

Employee's Direct (Epar) Supervisor responsible for Travel Authorization requests and Expense Reports approval.

### Review/Approve Department Travel Request



### Department Director

Approver role responsible for reviewing/approving travel requests for the Department.

### Review/Approve Travel Request



### Chiefs

Approver role responsible for reviewing/approving travel request.

### Review/Approve Department Group/International Travel Request



### Mayor

Approver role responsible for reviewing/approving travel requests for international and group and legislative travel.

### Central Travel Advance Review and Process



### Central Travel and Expense Processor

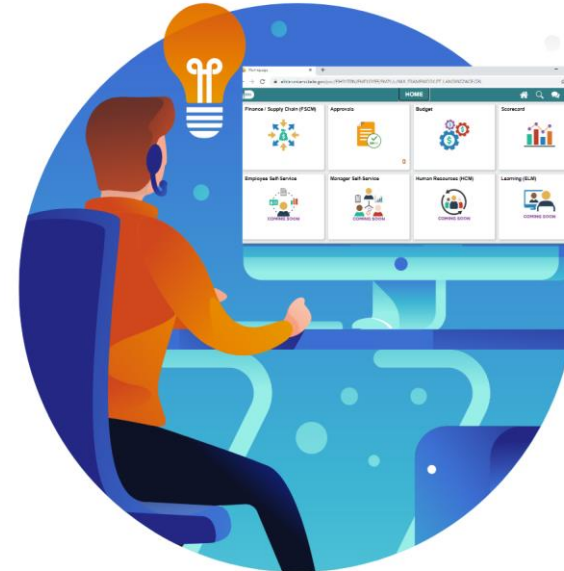
Central compliance role responsible for processing Travel Advance requests.

# Introduction to Activities and Exercises

- You will take part in two types of hands-on learning throughout this course.



Training  
Activities



Training  
Exercises

# Module 1: Course Introduction Summary

## Course Introduction Summary

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

Purpose and Benefits of the Business Process

The End-to-End Business Process

Introduction to Demonstrations and Exercises

# Module 2: Travel Authorization

## Module Topics

Lesson 1: Create and Submit Travel Authorization Overview

Lesson 2: Travel Authorization Workflow Overview Overview

Lesson 3: Maintain Travel Authorization Request



# Lesson 1: Create and Submit Travel Authorization

At the conclusion of this lesson, participants will be able to:

- Create and submit a travel authorization
  - View travel authorization status
  - Update a travel authorization
  - Cancel or delete a travel authorization

# Lesson 1: Create and Submit Travel Authorization, Continued

## TRAVEL AUTHORIZATION BUSINESS PROCESS

### Department Employee



### Department Employee

The Employee is responsible for preparing and submitting Travel Authorizations.

### Department Travel Compliance Review



### Travel Liaison

Department compliance role responsible for preparing/reviewing, and approving Travel Authorizations. Ensures that travel request adheres to County Travel Policy and Procedures Manual.

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Employee's Direct (Epar) Supervisor responsible for Travel Authorization requests and Expense Reports approval.

### Review/Approve Department Travel Request



### Department Director

Approver role responsible for reviewing/approving travel requests for the Department.

### Review/Approve Travel Request



### Chiefs

Approver role responsible for reviewing/approving travel request.

### Review/Approve Department Group/International Travel Request



### Mayor

Approver role responsible for reviewing/approving travel requests for international and group and legislative travel.

### Central Travel Advance Review and Process



### Central Travel and Expense Processor

Central compliance role responsible for processing Travel Advance requests.

# Lesson 1: Key Terms

The following key terms are used in this module:

Term	Definition
<b>Travel Authorization</b>	Permission for work related travel, if the trip requires prior approval from a supervisor, administrator, or applicable department head.
<b>Travel and Expenses</b>	uses standard permission list security and may be used for centralized or delegated entry of expense reports.
<b>Employee Self-Service</b>	incorporates special security for authorized users.
<b>Cash Advance</b>	A request made by an employee for an advance on an anticipated expense.
<b>Employee Profile</b>	Employee data that is set up and used to correctly route employee Travel Authorizations and Expense Reports through workflow for approval and also to send related payments to the correct mailing address or bank (if employee is set up for electronic payments). An Employee Profile must exist to process any expense transactions.

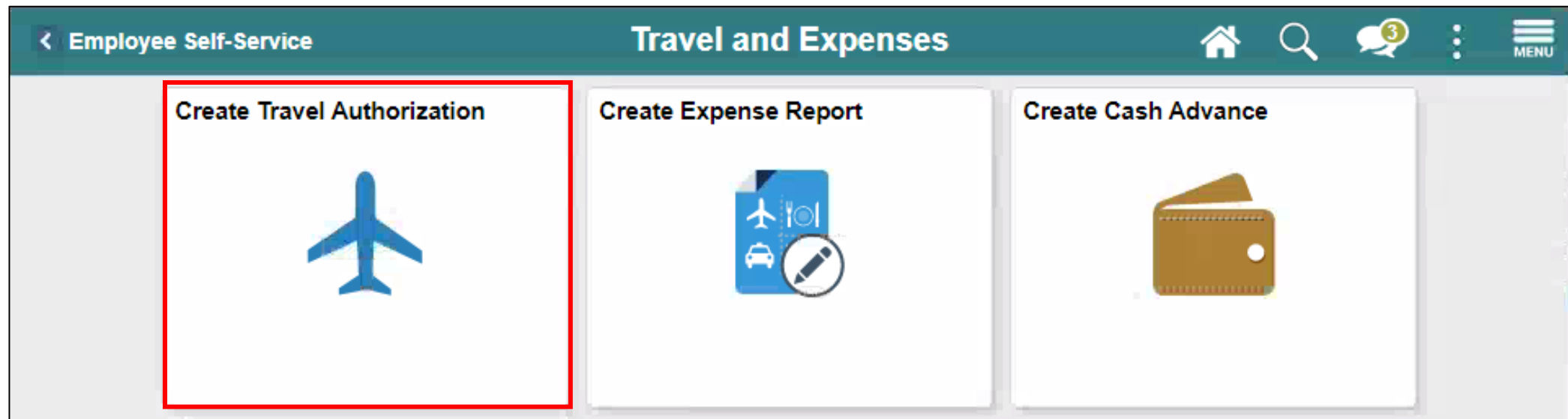
# Lesson 1: Key Terms, Continued

Term	Definition
<b>Expense Type</b>	A field on Travel Authorizations and Expense Reports that identifies the category of expense.
<b>Expenses</b>	Any costs incurred by the employee related to business travel and reimbursed to the employee.

# Lesson 1: Create and Submit Travel Authorization

The following are the steps on how to Create and Submit Travel Authorization:

1. Navigate to: **Employee Self-Service > Travel and Expenses > Travel Authorization.**



# Lesson 1: Create and Submit Travel Authorization, Continued

## 2. Select **Add**.

The screenshot shows a web application interface for 'Travel Authorization'. At the top, there is a teal header bar with a back arrow and 'Travel and Expenses' on the left, and 'Travel Authorization' in the center. On the right side of the header are icons for home, search, chat, and a menu. Below the header, there are links for 'New Window' and 'Help'. The main content area is titled 'Travel Authorization' and contains two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these buttons is a search field labeled 'Empl ID' with the value '00000001' and a search icon. At the bottom left, a green 'Add' button is highlighted with a red rectangular border.

# Lesson 1: Create and Submit Travel Authorization, Continued

## 3. Start with a blank authorization.

- Note: There are two **Quick Start** selections:
  - A **Template**: This option allows to copy from an existing template.
  - An **Existing Authorization**: This option allows copying from an existing travel authorization. If you use the **Quick Start** menu, Select the **Go** button to access.

The screenshot shows the 'Create Travel Authorization' form. The 'Quick Start' dropdown menu is open, showing two options: 'Populate From A Template' and 'An Existing Authorization'. The 'GO' button is highlighted in red. The form also includes fields for 'Business Purpose', 'Description', 'Default Location', 'Date From', 'Date To', and 'Projected Expenses'. The 'Projected Expenses' section is currently empty, showing a total of 0.00 USD.

# Lesson 1: Create and Submit Travel Authorization, Continued

## General Information Section:

4. Select an appropriate **Business Purpose** from the drop - down menu options. **Note:** If you choose **Other**, you can enter an explanation in the **Notes** before you submit the authorization.

The screenshot displays the 'Create Travel Authorization' form. The 'Business Purpose' dropdown menu is open, showing the following options: Conference, Education, Extraditions, Field Work, Investigation, Meeting, Other, Presentation, Recruitment, and Training. The form includes fields for Description, Date From, Date To, Default Location, Reference, and Projected Expenses. The 'Quick Start' dropdown is set to 'Test Test'. The 'Totals' section shows 0.00 USD for 0 Lines.

Description	*Payment Type	*Amount	Currency
		0.00	USD



# Lesson 1: Create and Submit Travel Authorization, Continued

5. In the **Description field**, enter a brief description of the travel purpose.

- The **Default Location** is the location to where the employee is traveling to. When populated, it populates the location to the expense lines that require location and can be changed as appropriate.
- In the **Date From and Date To** fields, enter the estimated beginning and end dates of the trip. If the travel is for a single day, enter or select the same day in both fields.

# Lesson 1: Create and Submit Travel Authorization, Continued

- The **Reference** field is used to select Group, International or Legislative related travel.

**Note:** The above selection will require the Mayor's approval.

- Use the **Attachments** link to add attachments to the Travel Authorization that can be viewed by the approver.

**Note:** Attachments a mandatory for travel authorization and can be attached at the header and expense detail lines.

# Lesson 1: Create and Submit Travel Authorization, Continued

**MIAMI-DADE COUNTY** in

[Authorize Expense Users](#) **Create Travel Authorization** [New Window](#) | [Help](#) | [Person](#)

**Create Travel Authorization** [Save for Later](#)

Test Test ? Quick Start [...Populate From](#) [GO](#)

\*Business Purpose [Training](#) Default Location [Miami, FL](#) [Q](#)

\*Description [Business Writing Seminar](#) \*Date From [12/06/2021](#) [Q](#) \*Date To [12/10/2021](#) [Q](#)

☐ Vacation Combined with Trip [Attachments](#)

Reference [Q](#)

Projected Expenses ? Totals (0 Lines) 0.00 USD

[Expand All](#) | [Collapse All](#) Add: [Quick-Fill](#)

*Date	*Expense Type	Description	*Payment Type	*Amount	Currency	+ -
<a href="#">Q</a>	<a href="#">Q</a>	<a href="#">Q</a>	<a href="#">Q</a>	0.00	USD	

[Expand All](#) | [Collapse All](#) Totals (0 Lines) 0.00 USD

# Lesson 1: Create and Submit Travel Authorization, Continued

## Entering Projected Expenses

6. The **Projected Expenses** section of the Travel Authorization Entry page is where travel expense information is entered. Select or enter the **Date** associated with the anticipated expense. Use the **Expense Type** drop-down menu to select the type of expense (e.g., mileage, hotel, meals, fees, rental car).

**Note:** Some rates will populate based on US General Services Administration Per Diem Rates (Lodging, Meals and Incidentals)

# Lesson 1: Create and Submit Travel Authorization, Continued

**MIAMI-DADE COUNTY**

**Create Travel Authorization**

[Authorize Expense Users](#)

☐ Vacation Combined with Trip

[Attachments](#)

Projected Expenses [?](#)

[Expand All](#) | [Collapse All](#)   Add: | [Quick-Fill](#)

		Totals (1 Line)	190.00	USD		
*Date	*Expense Type	Description	*Payment Type	*Amount	Currency	+ -
12/06/2021	Lodging			190.00	USD	
*Billing Type	Air Travel					
*Location	Auto Rental					
Number of Night	Auto Rental - ISD Fleet					
*Nightly Rate	Communications					
*Merchant	Gas					
	Lodging					
	Luggage					
	Meals and Incidental					
	Mileage					
	Other Travel Related Expenses					
	Parking					
	Per Diem-First and Last Day					
	Per Diem-Full Day					
	Registration					
	Taxi					
	Tolls					
		Totals (1 Line)	190.00	USD		

[Expand All](#) | [Collapse All](#)

# Lesson 1: Create and Submit Travel Authorization, Continued

## Entering Projected Expenses





Once the Expense Type is selected, all required fields for that expense type display on the expense line.



- In the Description field, enter information about the expense.
- In the Payment Type field, select Check or Prepaid Expenditure. Note: Prepaid Expenditures are those expense paid via a purchasing card.
- For some Expense Types, the Amount field auto-populates based on County's standard travel guidelines.
- In the Billing Type select Internal.
- The Location field populates based on the Default Location information entered in the header section of the page.

**Note:** This can be changed if necessary.


# Lesson 1: Create and Submit Travel Authorization, Continued

**MIAMI DADE COUNTY** **informs**





**< Authorize Expense Users** **Create Travel Authorization**     **MENU**


\*Description  \*Date From   \*Date To   Reference


☐ Vacation Combined with Trip [Attachments](#)

**Projected Expenses**  [Expand All](#) | [Collapse All](#) Add: | [Quick-Fill](#)

**Totals (1 Line)** **190.00** **USD**

*Date	*Expense Type	Description	*Payment Type	*Amount	Currency
12/06/2021 	Lodging 	Hotel Stay for training 	Check 	190.00	USD

**\*Billing Type**  


**\*Location**  

Number of Nights

\*Nightly Rate

\* ☐ Preferred ☒ Non-Preferred

Merchant

**Accounting Details** 

# Lesson 1: Create and Submit Travel Authorization, Continued

## Viewing the Accounting Detail Line

7. The **Account** value defaults based on the employee's profile setup in INFORMS. Enter any additional accounting details required for each expense line.

**Create Travel Authorization**

\*Billing Type: Internal

\*Location: Miami, FL

Number of Nights: 1

\*Nightly Rate: 190.00

\*: ☐ Preferred ☒ Non-Preferred

Merchant:

**Accounting Details** ?

Chartfields: ||>

Amount	*GL Unit	Fund	Dept	Account	Grant	PC Bus Unit	Project	Activity	Source Ty
190.00	MDADE	G1001	AD02030000	5312100000	NO-GRANT				

Expand All | Collapse All

Totals (1 Line) 190.00 USD



# Lesson 1: Create and Submit Travel Authorization, Continued

## Adding a Line

8. Enter all anticipated expenses, one per line, on the Travel Authorization. To add a line, Select the plus (+) button and a new line display.
- Use the **Attachments** link to add attachments to the Travel Authorization that can be viewed by the approver.

The screenshot displays the 'Create Travel Authorization' interface. At the top, the 'Projected Expenses' section shows a total of 190.00 USD for 1 line. Below this, the form fields for the first line item are visible: \*Date (12/06/2021), \*Expense Type (Lodging), Description, \*Payment Type, \*Amount (190.00), and Currency (USD). The \*Attachments link is highlighted with a red box, and the '+' button to add a new line is also highlighted with a red box. The form includes sections for \*Billing Type, \*Location (Miami, FL), Number of Nights (1), \*Nightly Rate (190.00), and Merchant. At the bottom, the 'Accounting Details' section shows a table with columns for Amount, Ind Affil, Grant Affil, Affiliate, ChartField 1, ChartField 2, ChartField 3, and Product. The Amount column shows 190.00.

# Lesson 1: Create and Submit Travel Authorization, Continued

## Saving a Travel Authorization

The Traveler can save and/or submit the Travel Authorization for approval after all projected expense lines have been entered. **If the Travel Liaison creates the Travel Authorization on behalf of the traveler, the form can be saved, but not submitted for approval.** The Traveler will be required to review and submit the authorization for approval.

# Lesson 1: Create and Submit Travel Authorization, Continued

## Saving a Travel Authorization

9. Select the **Save for Later** link at the top of the page and return to the form at a later time.

10. **INFORMS** auto-assigns an **Authorization ID** and the request is saved with a **Pending** status. The page header changes from **Create Travel Authorization** to **Modify Travel Authorization**.

# Lesson 1: Create and Submit Travel Authorization, Continued

## Saving a Travel Authorization

11. The Travel Authorization does not route for approval until it has been submitted successfully by the Traveler.

**Modify Travel Authorization**

Test Test ?

Actions ...Choose an Action GO

\*Business Purpose Meeting

\*Description Business Writing Seminar

Default Location Miami, FL

\*Date From 12/06/2021 \*Date To 12/10/2021

☐ Vacation Combined with Trip

Attachments

Authorization ID 0000000026 Pending

Reference

Projected Expenses ?

Expand All Collapse All Add: Quick-Fill

Totals (1 Line) 190.00 USD

*Date	*Expense Type	Description	*Payment Type	*Amount	Currency	+ -
12/06/2021	Lodging		Check	190.00	USD	

\*Billing Type Internal

\*Location Miami, FL

Number of Nights 1

\*Nightly Rate 190.00

\* ☐ Preferred ☒ Non-Preferred

Merchant Hertz

Save for Later

# Lesson 1: Create and Submit Travel Authorization, Continued

## Submitting Travel Authorization

12. To submit the authorization, Select the **Summary and Submit** link at the top of the page.

The screenshot displays the 'Modify Travel Authorization' interface. At the top, the 'Summary and Submit' link is highlighted with a red box. The form includes the following fields and sections:

- Header:** MIAMI-DADE COUNTY, Employee Self-Service, Modify Travel Authorization, infirms logo.
- Actions:** Save for Later, Summary and Submit (highlighted), GO.
- User Information:** ARLIN MONTERO (?), Sent Back For Revision, By: BELLO, JOAQUIN NAPOLEON, Update the details.
- \*Business Purpose:** Education (dropdown).
- \*Description:** learn (text field).
- Default Location:** Rio de Janeiro (text field).
- \*Date From:** 10/16/2020 (calendar icon).
- \*Date To:** 10/17/2020 (calendar icon).
- Authorization ID:** 0000000046 Pending.
- Reference:** (text field).
- Attachments:** (link icon).
- Projected Expenses:** Expand All | Collapse All | Add: Quick-Fill.
- Totals (1 Line):** 30.00 USD.
- \*Date:** 10/16/2020 (calendar icon).
- \*Expense Type:** Luggage (dropdown).
- Description:** travel (text field).
- \*Payment Type:** Check (dropdown).
- \*Amount:** 30.00.
- Currency:** USD.
- \*Billing Type:** Internal (dropdown).
- Accounting Details:** (link icon).
- Totals (1 Line):** 30.00 USD.

# Lesson 1: Create and Submit Travel Authorization, Continued

## Submitting Travel Authorization

13. Select on the Notes link to indicate if the traveler is requesting a Cash Advance.

**Employee Self-Service** **Modify Travel Authorization** **informs**

New Window | Help | Personalize Page

**Modify Travel Authorization** [Save for Later](#) [Travel Authorization Details](#)

ARLIN MONTERO Actions [...Choose an Action](#) **GO**

\*Business Purpose [Education](#) Default Location [Rio de Janeiro](#) Authorization ID 0000000046 Pending

\*Description [learn](#) \*Date From [10/16/2020](#) \*Date To [10/17/2020](#) Created 10/16/2020 ARLIN MONTERO

☐ Vacation Combined with Trip Reference [Reference](#) Last Updated 11/04/2020 JOAQUIN BELLO

Totals [View Printable Version](#) **Notes** [Attachments](#)

Projected Expenses (1 Line) 30.00 USD Denied Expenses 0.00 USD

Total Authorized Amount 30.00 USD

☒ By checking this box, I certify these costs are reasonable estimates and comply with expense policy.

**Submit Travel Authorization**

# Lesson 1: Create and Submit Travel Authorization, Continued

## Submitting Travel Authorization

14. Check the certification checkbox to enable to **Submit Travel Authorization** button.

**Employee Self-Service** **Modify Travel Authorization** *informs*

New Window | Help | Personalize Page

**Modify Travel Authorization** [Save for Later](#) [Travel Authorization Details](#)

ARLIN MONTERO Actions [...Choose an Action](#) **GO**

\*Business Purpose: Education Default Location: Rio de Janeiro Authorization ID: 0000000046 Pending

\*Description: learn \*Date From: 10/16/2020 \*Date To: 10/17/2020 Created: 10/16/2020 ARLIN MONTERO

☐ Vacation Combined with Trip Reference:  Last Updated: 11/04/2020 JOAQUIN BELLO

Totals [View Printable Version](#) [Notes](#) [Attachments](#)

Projected Expenses (1 Line)	30.00 USD	Denied Expenses	0.00 USD
Total Authorized Amount		30.00 USD	

☒ By checking this box, I certify these costs are reasonable estimates and comply with expense policy.

**Submit Travel Authorization**

# Lesson 1: Create and Submit Travel Authorization, Continued

## Submitting Travel Authorization

15. Select the **Submit Travel Authorization** button.

**Note:** A confirmation pop-up window displays.

The screenshot shows the 'Create Travel Authorization' form in the 'informs' system. The user 'ARLIN MONTERO' is logged in. The form includes fields for Business Purpose (Meeting), Description (test), Default Location (Miami, FL), Date From (01/31/2022), Date To (02/01/2022), and a Reference field. There are links for 'Save for Later', 'Travel Authorization Details', 'View Printable Version', 'Notes', and 'Attachments'. A summary table shows Projected Expenses (1 Line) at 10.00 USD, Denied Expenses at 0.00 USD, and a Total Authorized Amount of 10.00 USD. At the bottom, there is a checkbox for certifying costs and a green 'Submit Travel Authorization' button highlighted with a red rectangle.

Totals	
Projected Expenses (1 Line)	10.00 USD
Denied Expenses	0.00 USD
<b>Total Authorized Amount</b>	<b>10.00 USD</b>

☐ By checking this box, I certify these costs are reasonable estimates and comply with expense policy.

**Submit Travel Authorization**



# Lesson 1: Create and Submit Travel Authorization, Continued

## Submitting Travel Authorization

16. Select the **OK** button to confirm the submission.

- INFORMS assigns an **Authorization ID**.
- A message displays in red indicating the travel authorization number have been submitted for approval.

The screenshot shows the 'Create Travel Authorization' form in the INFORMS system. A modal dialog titled 'Travel Auth Submit Confirm' is displayed over the form. The dialog contains the following information:

- Create Travel Authorization**
- Submit Confirmation**
- ARLIN MONTERO**
- Totals**
- Total Authorized Amount: 10.00 USD**
- OK** and **Cancel** buttons

The background form shows the following details:

- ARLIN MONTERO**
- \*Business Purpose:** Meeting
- \*Description:** test
- Vacation Combined with Trip:** (checkbox)
- Totals**
- Projected Expenses (1 Line): 10.00 USD**
- Submit Travel Authorization** button

# Lesson 1: Create and Submit Travel Authorization, Continued

## Travel Authorization Approval Routing

INFORMS workflow routes the authorization to the appropriate approver's worklist. If more than one approval is required, the authorization automatically routes through the appropriate levels.

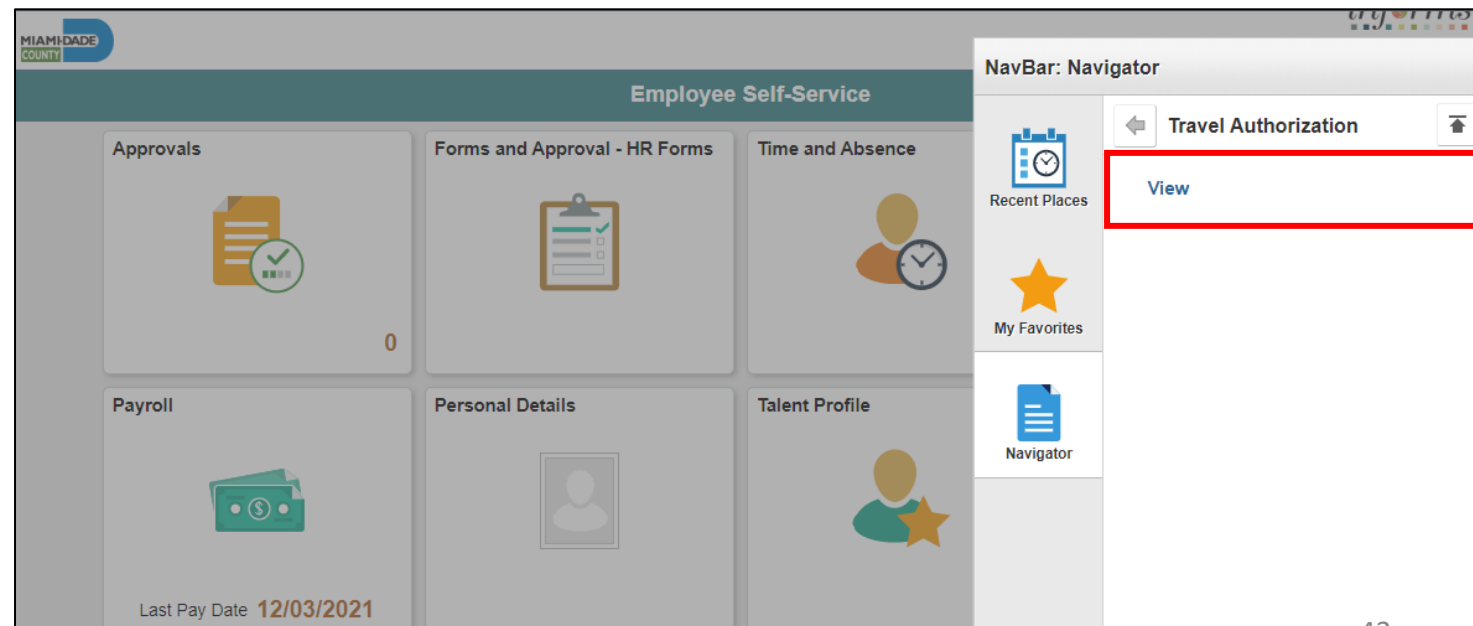
The approver may approve, deny, or send the authorization back to you for updates. If the request is not approved, the approver must provide comments explaining why.

# Lesson 1: Create and Submit Travel Authorization, Continued

## Viewing the Travel Authorization Status

Liaisons or an employee can view the Travel Authorization once it has been saved or submitted.

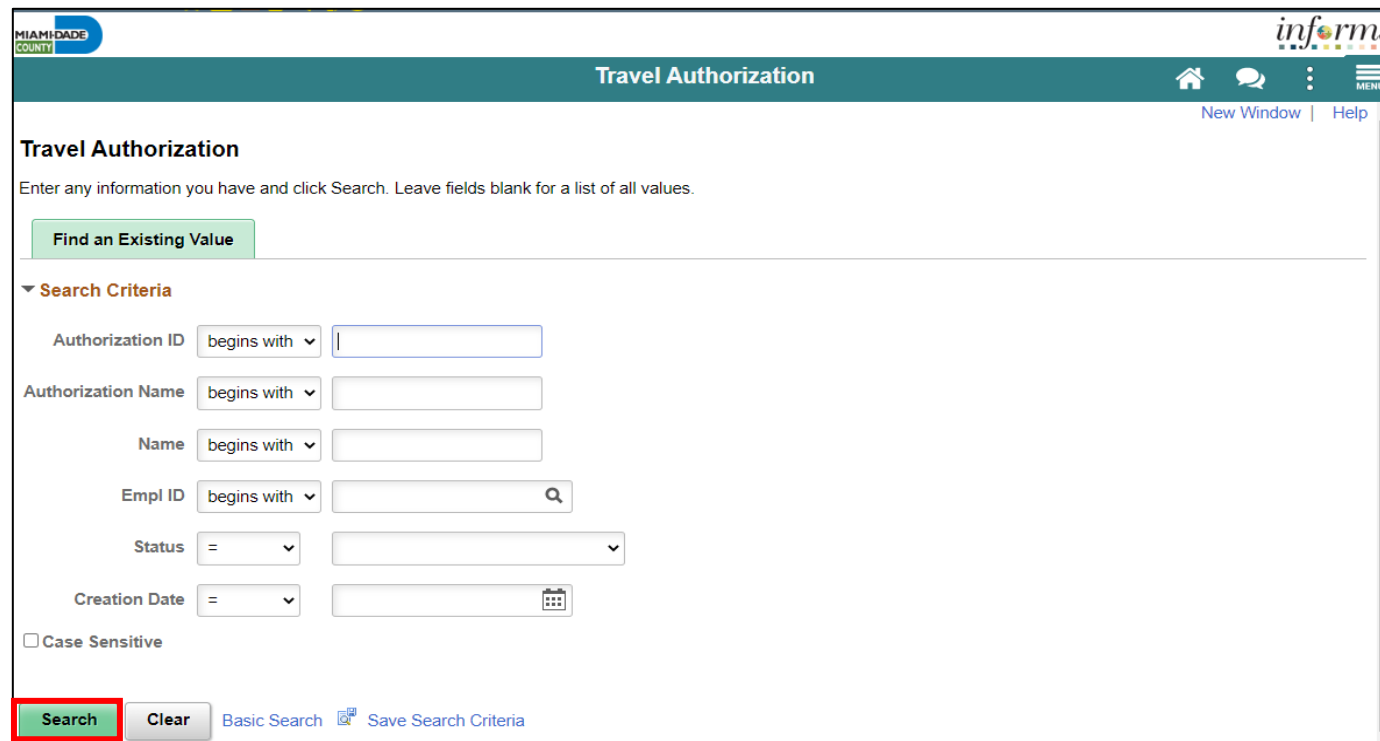
1. To view a Travel Authorization, access the **View Travel Authorization Details** page using the following path: **NavBar Menu > Navigator > Finance/Supply Chain > Travel and Expense > Travel Authorization > View.**



# Lesson 1: Create and Submit Travel Authorization, Continued

## Viewing the Travel Authorization Status

2. Search for a Travel Authorization using any of the **Search by** drop-down menu options. Enter the information and Select the **Search** button.



The screenshot shows the 'Travel Authorization' search page in the 'informs' system. The page has a teal header with the 'MIAMI-DADE COUNTY' logo on the left and the 'informs' logo on the right. Below the header, there's a navigation bar with 'New Window' and 'Help' links. The main content area is titled 'Travel Authorization' and includes a sub-header 'Find an Existing Value'. Below this, there's a section for 'Search Criteria' with several search fields: 'Authorization ID' (begins with), 'Authorization Name' (begins with), 'Name' (begins with), 'Empl ID' (begins with), 'Status' (equals), and 'Creation Date' (equals). Each field has a corresponding input box. At the bottom left, there is a red-bordered 'Search' button and a 'Clear' button. To the right of these buttons are links for 'Basic Search' and 'Save Search Criteria'.

MIAMI-DADE COUNTY

informs

Travel Authorization

New Window | Help

Travel Authorization

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Authorization ID begins with

Authorization Name begins with

Name begins with

Empl ID begins with

Status =

Creation Date =

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

# Lesson 1: Create and Submit Travel Authorization, Continued

## Viewing the Travel Authorization Status

3. The status displays next to the **Authorization ID** at the top of the page. After the authorization is approved, the status changes to **Approved**.

The screenshot displays the 'Travel Authorization' form in the 'informs' system. The form is titled 'Travel Authorization' and includes a navigation bar with 'New Window', 'Help', and 'Personalize Page' options. The user 'Arlin Montero' is logged in. The form contains the following fields:

- Business Purpose:** Other
- Description:** Other
- Default Location:** Austin, TX
- Date From:** 11/04/2020
- Date To:** 11/05/2020
- Reference:**
- Authorization ID:** 0000000057
- Status:** Approved (highlighted in a red box)
- Created:** 11/04/2020
- Last Updated:** 11/04/2020

The form also includes a 'Totals' section with the following values:

Category	Amount	Unit
Projected Expenses (1 Line)	20.00	USD
Denied Expenses	0.00	USD
<b>Total Authorized Amount</b>	<b>20.00</b>	<b>USD</b>

At the bottom of the form, there is a checkbox for 'By checking this box, I certify these costs are reasonable estimates and comply with expense policy.' and a 'Submit Travel Authorization' button. The 'Submitted On' date is 11/04/2020.

# Lesson 1: Create and Submit Travel Authorization, Continued

## Viewing the Travel Authorization Status

4. The **Approval History** section of the page provides information about the processing status and the approval flow.
5. The individual approvers will display in the **Actions** box once they are approved.

MIAMI-DADE COUNTY

informs

Travel Authorization

Projected Expenses (1 Line) 100.00 USD Denied Expenses 0.00 USD

Total Authorized Amount 100.00 USD

☐ By checking this box, I certify these costs are reasonable estimates and comply with expense policy.

Submit Travel Authorization Withdraw Travel Authorization Submitted On 01/27/2022 Submitted By ARLIN MONTERO

Approval History

Submitted ARLIN MONTERO Travel Liaison JOAQUIN BELLO HR Supervisor JOSEPH CONAWY Department Director Multiple Approvers Deputy Mayor (Pooled) Central Finance EX Processor WALDO GARCIA

Action	Role	Name	Date/Time
Submitted	Employee	ARLIN MONTERO	01/27/2022 3:36:57AM

Return to Search Notify

# Lesson 1: Create and Submit Travel Authorization, Continued

## Updating/Canceling and Deleting a Travel Authorization

### A Travel Authorization can be updated if:

- An incomplete authorization was saved and needs to be completed
- The Travel Authorization was sent back, and changes are required

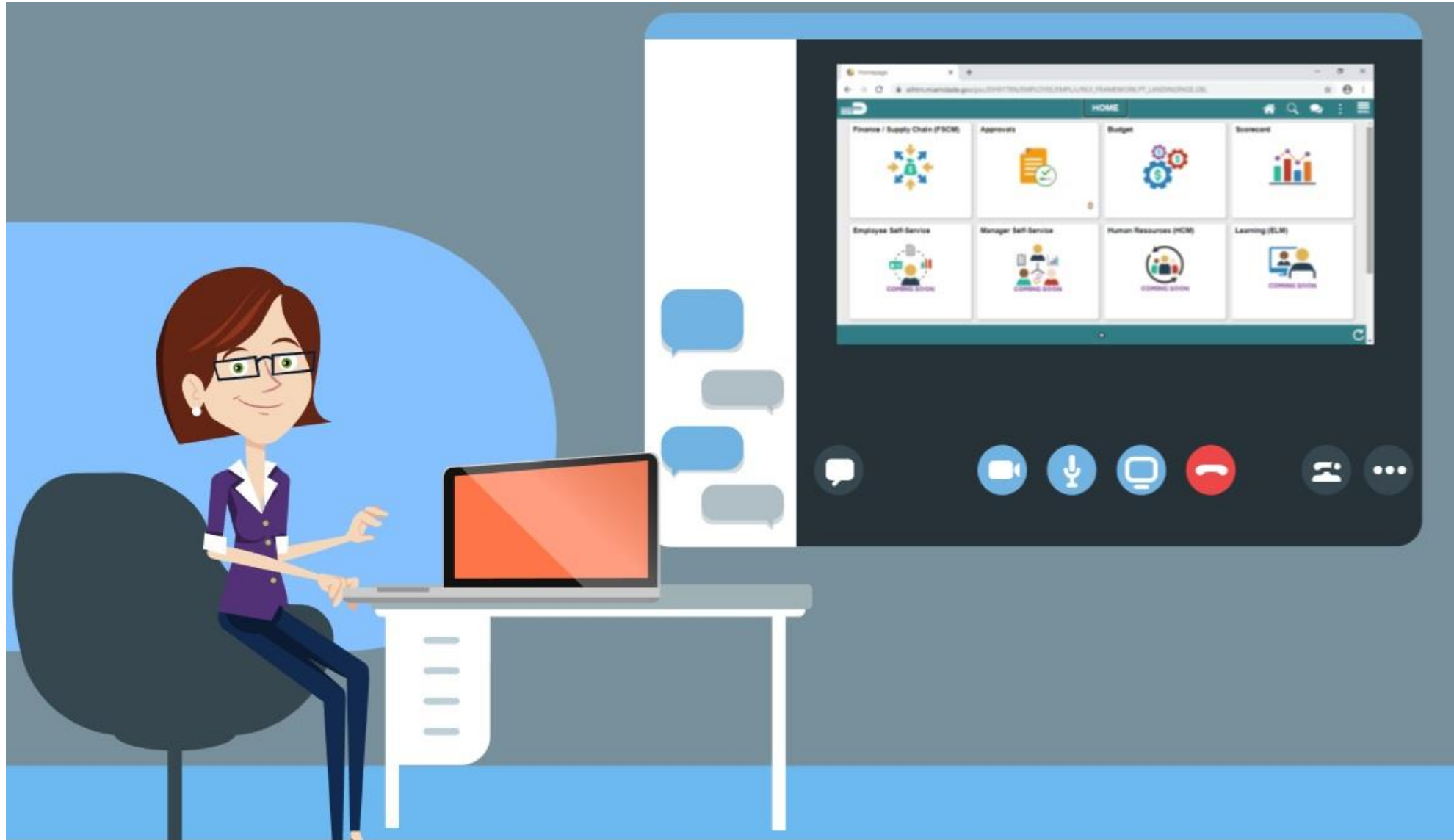
### A Travel Authorization can be withdrawn if:

- It has not been approved and is not associated to an Expense Report
- For example, an authorization can be withdrawn if an employee's trip is cancelled after approval. Cancelled authorizations are not deleted from INFORMS and can still be viewed

### A Travel Authorization can be deleted if it:

- Has not been **submitted**
- Has been **withdrawn**
- Was **returned** or denied by the approver(s)
- **Deleted** authorizations cannot be viewed

# Lesson 1: Activities and Exercises





# Lesson 1: Lesson Summary

Now that you have completed the Create and Submit Travel Authorization lesson, you should be able to:

- Create and submit a travel authorization
  - View travel authorization status
  - Update a travel authorization
  - Cancel or delete a travel authorization

# Lesson 2: Travel Authorization Workflow Overview

At the conclusion of this lesson, you will be able to:

- Identify the Travel Authorization Workflow Overview
  - Process
  - Approve
  - Denied
  - Push Back
- Demonstrate the steps in navigation for Travel authorization and its process

# Lesson 2: Travel Authorization Workflow Overview

## TRAVEL AUTHORIZATION BUSINESS PROCESS

### Department Employee



### Department Employee

The Employee is responsible for preparing and submitting Travel Authorizations.

### Department Travel Compliance Review



### Travel Liaison

Department compliance role responsible for preparing/reviewing, and approving Travel Authorizations. Ensures that travel request adheres to County Travel Policy and Procedures Manual.

### Review/Approve Employee Travel Request



### Supervisor

Employee's Direct (Epar) Supervisor responsible for Travel Authorization requests and Expense Reports approval.

### Review/Approve Department Travel Request



### Department Director

Approver role responsible for reviewing/approving travel requests for the Department.

### Review/Approve Travel Request



### Chiefs

Approver role responsible for reviewing/approving travel request.

### Review/Approve Department Group/International Travel Request



### Mayor

Approver role responsible for reviewing/approving travel requests for international and group and legislative travel.

### Central Travel Advance Review and Process



### Central Travel and Expense Processor

Central compliance role responsible for processing Travel Advance requests.

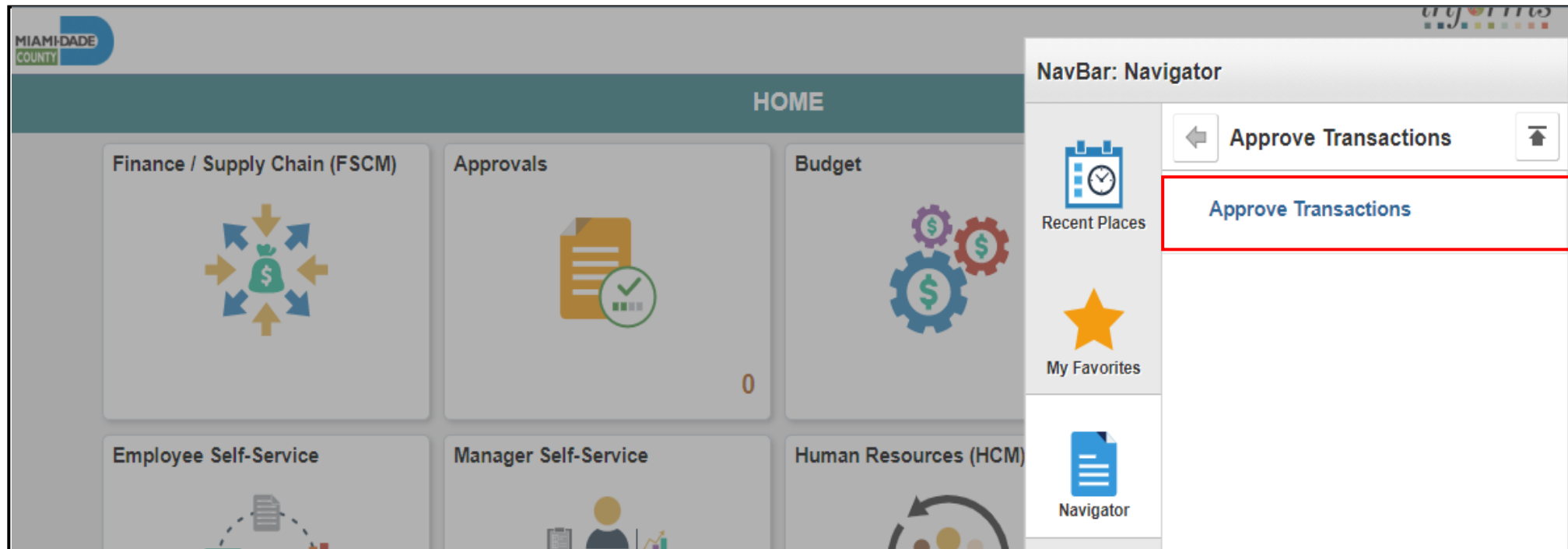
# Lesson 2: Key Terms

Term	Definition
<b>Travel Authorization</b>	Permission for work related travel, if the trip requires prior approval from a supervisor, administrator, or applicable department head.
<b>Travel and Expenses</b>	Uses standard permission list security and may be used for centralized or delegated entry of expense reports.

# Lesson 2: Travel Authorization Workflow Overview

## Travel Authorization Workflow Overview-Approve

1. Begin by navigating **Menu > Navigator > Finance/Supply Chain > Travel and Expense > Approve Transactions > Approve Transactions**



# Lesson 2: Travel Authorization Workflow Overview, Continued

## Travel Authorization Workflow Overview-Approve

2. Select the **Travel Authorization** Tab to review and approve multiple travel authorizations.

**MIAMI-DADE COUNTY**

**Employee Self-Service** **Approve Transactions**

Overview Expense Reports Time Reports Time Adjustments **Travel Authorizations** Cash Advances Errors

Search Pending Transactions ?

Change Sort Order ?

Refresh List

Transactions to Approve ?

Transaction Type	Total	Unit	Name	Employee ID	Vacation Combined with Trip	Date Submitted	Status	Role
	0.000							

Refresh List

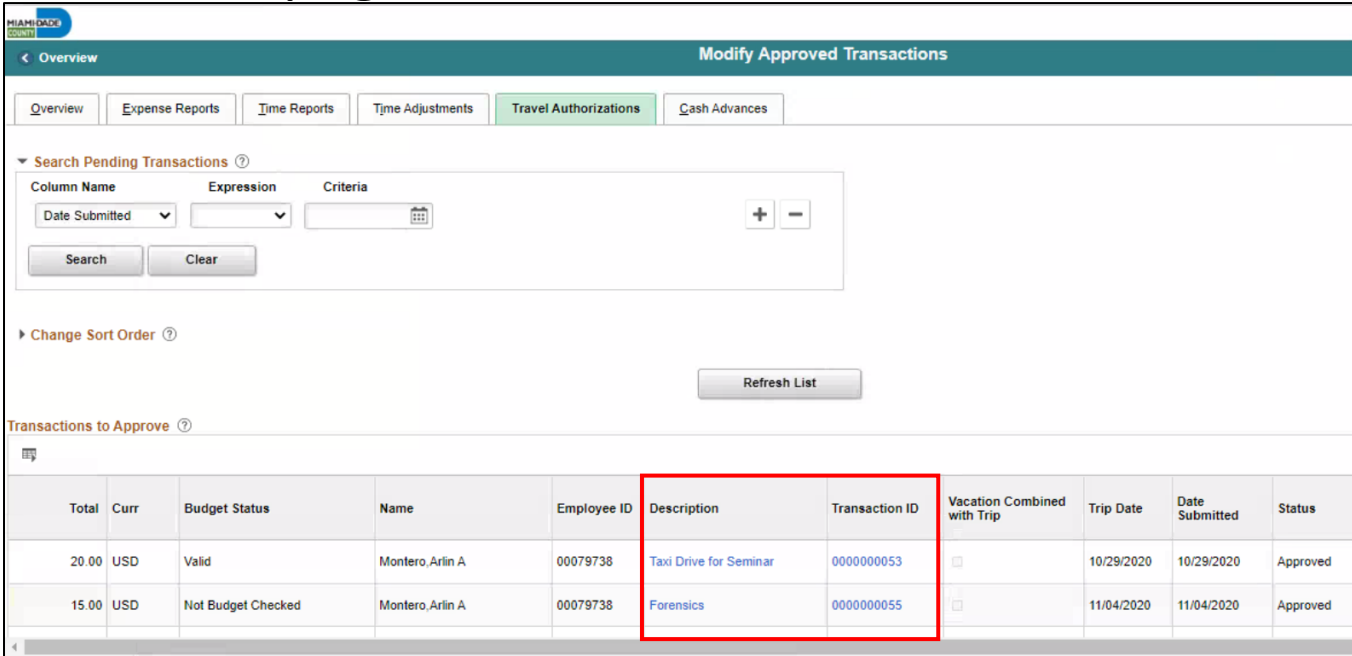
[Return to Approval List](#)  
[Employee Expense History](#)

[Overview](#) | [Expense Reports](#) | [Time Reports](#) | [Time Adjustments](#) | [Travel Authorizations](#) | [Cash Advances](#) | [Errors](#)

# Lesson 2: Travel Authorization Workflow Overview, Continued

## Travel Authorization Workflow Overview-Approve

3. Select the **Description** or **Transaction ID** link to navigate to the **Travel Authorization Summary** page to review a summary of travel authorization expenses and select an approval action. Approvers who have authority to approve travel authorizations use this page.



**Modify Approved Transactions**

Overview Expense Reports Time Reports Time Adjustments **Travel Authorizations** Cash Advances

Search Pending Transactions ?

Column Name Expression Criteria

Date Submitted

Search Clear

Change Sort Order ?

Refresh List

Transactions to Approve ?

Total	Curr	Budget Status	Name	Employee ID	Description	Transaction ID	Vacation Combined with Trip	Trip Date	Date Submitted	Status
20.00	USD	Valid	Montero, Arlin A	00079738	Taxi Drive for Seminar	0000000053	<input type="checkbox"/>	10/29/2020	10/29/2020	Approved
15.00	USD	Not Budget Checked	Montero, Arlin A	00079738	Forensics	0000000055	<input type="checkbox"/>	11/04/2020	11/04/2020	Approved

# Lesson 2: Travel Authorization Workflow Overview, Continued

## Travel Authorization Workflow Overview-Approve

4. Select the **Accounting Defaults** link to access page and view, add or modify line accounting distribution for the travel authorization.

**Note: Only Travel Liaison will have access to modify accounting details. All other approvers have View access only.**

**Modify Approved Transactions**

[Approve Travel Authorization](#)

**Accounting Defaults**

Arlin Montero Authorization ID 0000000053

**Accounting Summary**

%	*GL Unit	Fund	Dept	Grant	PC Bus Unit	Project	Activity	Source Type	Category	Subcategory
100.00	MDADE		BU02010000							

[Add ChartField Line](#)

[OK](#)

[User Defaults](#)



# Lesson 2: Travel Authorization Workflow Overview, Continued

## Travel Authorization Workflow Overview-Approve

5. Select **OK** to go back to the main Travel Authorization Summary.

MIAMI-DADE COUNTY

Overview

Modify Approved Transactions

Approve Travel Authorization

Accounting Defaults

Arlin Montero

Authorization ID 0000000053

Accounting Summary

Q

%	*GL Unit	Fund	Dept	Grant	PC Bus Unit	Project	Activity	Source Type	Category	Subcategory
100.00	MDADE		BU02010000							

Add ChartField Line

OK

User Defaults

# Lesson 2: Travel Authorization Workflow Overview, Continued

## Travel Authorization Workflow Overview-Approve

6. Use the **More Options** list to navigate to different pages associated with this travel authorization

- **Travel Authorization Details:** Select to access the **Travel Authorization Details** page
- **View Exception Comments:** Select to access the **View Exception Comments** page

**MIAMI-DADE COUNTY**

[< Overview](#) **Modify Approved Transactions**

Approve Travel Authorization

**Travel Authorization Summary**

Arlin Montero [User Defaults](#)

**General Information**

Description	Taxi Drive for Seminar	Authorization ID	0000000053
Business Purpose	Education	Reference	
Status	Approved		
Date From	10/29/2020	To	10/30/2020
Updated on	10/29/2020 12:14:38PM	By	MD_EX_DPT_APPROVAL_BUDGET

[Attachments](#) [Notes](#)

**Accounting Defaults**

**More Options** [...Choose an Action](#) [GO](#)

[...Choose an Action](#)

[Travel Authorization Details](#)

[View Exception Comments](#)

You can deny individual expenses and still approve or send back the overall report.

**Details**

1-1 of 1

Expense Type	Date	PC Business Unit	Project	Activity	Amount	Currency	Attachments	Approve
Taxi	10/29/2020				20.00	USD	<a href="#">Attachments</a>	

# Lesson 2: Travel Authorization Workflow Overview, Continued

## Travel Authorization Workflow Overview-Approve

7. Use the **Expense Detail** page to view the travel authorization request details.

**MIAMI-DADE COUNTY**

**Approve Transactions**

[Overview](#)

Status: Submitted for Approval

Date From: 10/29/2020 To: 10/30/2020 Updated on: 10/29/2020 1:17:44AM By: MD\_EX\_DPT\_EMPLOYEE

[Attachments](#) [Notes](#)

More Options: [...Choose an Action](#) [GO](#)

You can deny individual expenses and still approve or send back the overall report.

**Details**

1-14 of 14

Expense Type	Date	Amount	Currency	Attachments	Approve	
<a href="#">Meals and Incidentals</a>	10/29/2020	10.00	USD	<a href="#">Attachments</a>	<input type="checkbox"/>	<a href="#">Select reason...</a>
<a href="#">Meals and Incidentals</a>	10/29/2020	10.00	USD	<a href="#">Attachments</a>	<input checked="" type="checkbox"/>	
<a href="#">Meals and Incidentals</a>	10/29/2020	10.00	USD	<a href="#">Attachments</a>	<input checked="" type="checkbox"/>	
<a href="#">Meals and Incidentals</a>	10/29/2020	10.00	USD	<a href="#">Attachments</a>	<input checked="" type="checkbox"/>	

# Lesson 2: Travel Authorization Workflow Overview, Continued

## Travel Authorization Workflow Overview-Approve

8. Uncheck the **Approve** option if an expense line is not approved, and a corresponding reason must be selected from the drop-down list box.

- Clear the **Approve** option if you do not approve the expense line
- The drop-down list box is displayed next to the Approve option
- Enter a comment in the Approval Detail section to provide detailed information

**MIAMI-DADE COUNTY**

**Approve Transactions**

**Overview**

Status: Submitted for Approval  
Date From: 10/29/2020 To: 10/30/2020  
Updated on: 10/29/2020 1:17:44AM  
By: MD\_EX\_DPT\_EMPLOYEE  
[Attachments](#) [Notes](#)

More Options: ...Choose an Action **GO**

You can deny individual expenses and still approve or send back the overall report.

**Details**

1-14 of 14

Expense Type	Date	Amount	Currency	Attachments	Approve	
Meals and Incidental	10/29/2020	10.00	USD	<a href="#">Attachments</a>	<input type="checkbox"/>	Select reason...
Meals and Incidental	10/29/2020	10.00	USD	<a href="#">Attachments</a>	<input checked="" type="checkbox"/>	
Meals and Incidental	10/29/2020	10.00	USD	<a href="#">Attachments</a>	<input checked="" type="checkbox"/>	
Meals and Incidental	10/29/2020	10.00	USD	<a href="#">Attachments</a>	<input checked="" type="checkbox"/>	

# Lesson 2: Travel Authorization Workflow Overview, Continued

## Travel Authorization Workflow Overview-Approve

9. You can navigate to the next expense line from this page.

- Select the **Next in List** button to advance to the next expense line.
- Select the **Previous in List** button to go back to the previous expense line.
- Select the **Return to Approvals List** link to return to the summary page

**MIAMI-DADE COUNTY**

**Approve Transactions**

**Action History**

Role	Name	Action	Date/Time
Employee	MONTERO,ARLIN	Submitted	10/29/2020 1:17:44AM

**Comments**

Budget Checking is required before the Travel Authorization can be Approved. Please click on the Budget Options hyperlink.

Budget Status Not Budget Checked

[Budget Options](#)

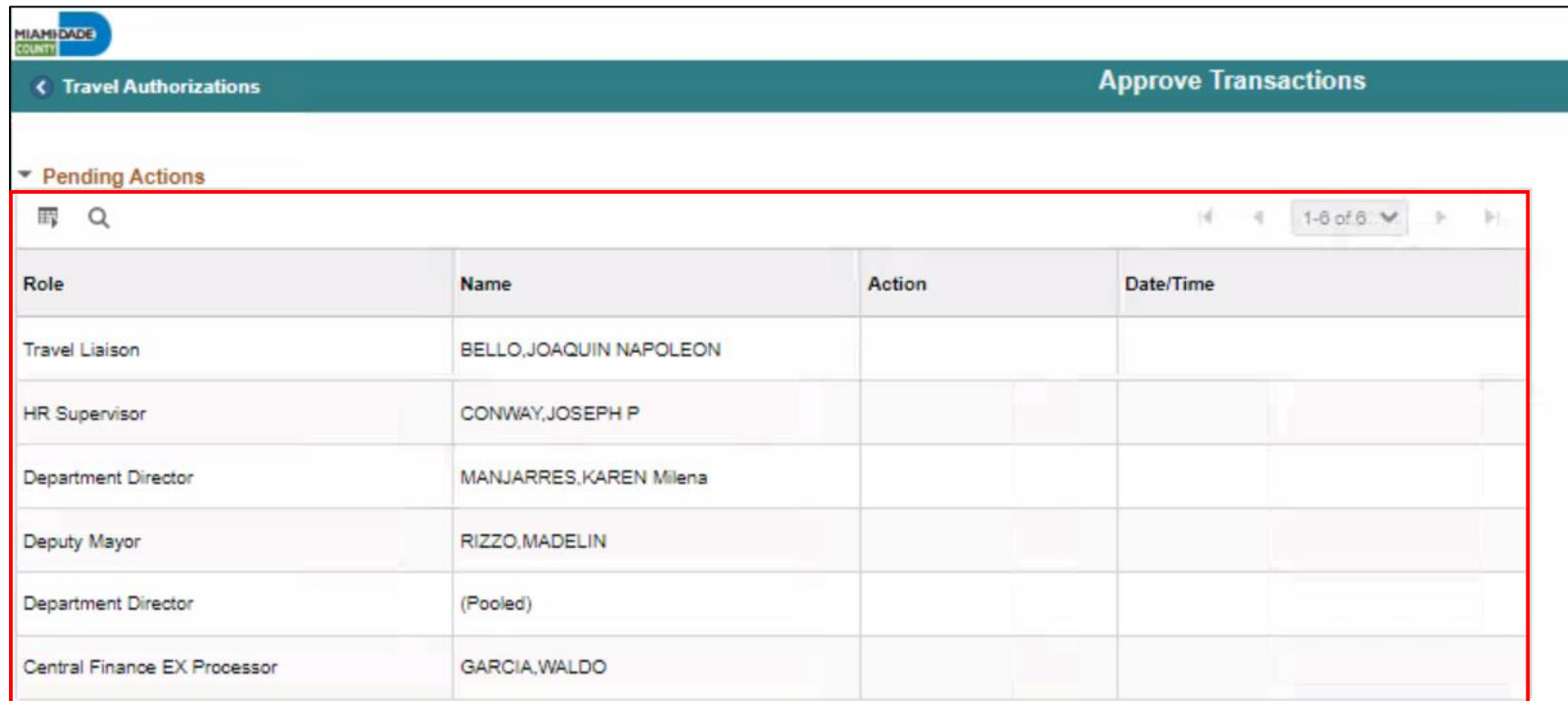
Approve Send Back Hold Deny

[Return to Approval List](#) [Next in List](#) [Previous in List](#)

# Lesson 2: Travel Authorization Workflow Overview, Continued

## Travel Authorization Workflow Overview-Approve

- The **Pending Actions** section displays the names of approvers who needs to review and approve the travel authorization.



Role	Name	Action	Date/Time
Travel Liaison	BELLO, JOAQUIN NAPOLEON		
HR Supervisor	CONWAY, JOSEPH P		
Department Director	MANJARRES, KAREN Milena		
Deputy Mayor	RIZZO, MADELIN		
Department Director	(Pooled)		
Central Finance EX Processor	GARCIA, WALDO		

# Lesson 2: Travel Authorization Workflow Overview, Continued

## Travel Authorization Workflow Overview-Approve

- The **Action History** section displays the transaction submittal and approval activities that have occurred, as well as the approver's name and the date changes were made

**MIAMI-DADE COUNTY**

[Travel Authorizations](#) **Approve Transactions**

**Action History**

Role	Name	Action	Date/Time
Employee	MONTERO,ARLIN	Submitted	01/27/2022 3:36:57AM

**Comments**

Budget Checking completed. Report is ready for Approval/Posting.

Budget Status: Valid

[Budget Options](#)

[Approve](#) [Send Back](#) [Hold](#) [Deny](#) [Save Changes](#)

[Return to Approval List](#) [Next in List](#) [Previous in List](#)

# Lesson 2: Travel Authorization Workflow Overview, Continued

## Travel Authorization Workflow Overview-Approve

- Use the **Comments** field to enter relevant information regarding the travel authorization (i.e., If denied, provide an explanation as to why)
  - If you enter comments and send the travel authorization back to the employee, INFORMS displays comments when the employee modifies the travel authorization
  - INFORMS does not display comments to the employee in view mode
- After employees resubmit travel authorizations, INFORMS displays comment history to all approvers

**MIAMI-DADE COUNTY**

**Approve Transactions**

**Action History**

Role	Name	Action	Date/Time
Employee	MONTERO,ARLIN	Submitted	01/27/2022 3:38:57AM

**Comments**

Budget Checking completed. Report is ready for Approval/Posting.

Budget Status Valid

Budget Options



# Lesson 2: Travel Authorization Workflow Overview, Continued

## Travel Authorization Workflow Overview-Approve

- After reviewing the Travel Authorization and Expense lines, the Travel Authorization can be approved, denied, or sent back.
  - Proceed to **Step 10** to send the Travel Authorization back to the employee.
  - Proceed to **Step 11** to deny the Travel Authorization.
  - Proceed to **Step 12** to approve the Travel Authorization.

# Lesson 2: Travel Authorization Workflow Overview, Continued

## Travel Authorization Workflow Overview-Approve

10. Select the **Send Back** button to return the travel authorization to the employee for correction or revision.

- This action changes the status to **Pending**. If you send the travel authorization back to the employee, you must also provide an explanation in the Comments field.

**MIAMI-DADE COUNTY**

**Approve Transactions**

**Overview**

**Action History**

Role	Name	Action	Date/Time
Employee	MONTERO,ARLIN	Submitted	01/27/2022 3:38:57AM

**Comments**

Budget Checking completed. Report is ready for Approval/Posting.

Budget Status: Valid

Budget Options

**Approve** **Send Back** **Hold** **Deny** **Save Changes**

[Return to Approval List](#) [Next in List](#) [Previous in List](#)

# Lesson 2: Travel Authorization Workflow Overview, Continued

## Travel Authorization Workflow Overview-Approve

11. Select the **Deny** button to deny the entire travel authorization and change the status to **Denied**.

MIAMI-DADE COUNTY

Overview Approve Transactions

▼ Action History

1-1 of 1

Role	Name	Action	Date/Time
Employee	MONTERO,ARLIN	Submitted	01/27/2022 3:36:57AM

▼ Comments

Budget Checking completed. Report is ready for Approval/Posting.

Budget Status Valid

Budget Options

Approve Send Back Hold Deny Save Changes

Return to Approval List Next in List Previous in List

- If you deny the request, you must also provide an explanation in the **Comments** field. INFORMS does not route denied travel authorizations to subsequent approvers.

# Lesson 2: Travel Authorization Workflow Overview, Continued

## Travel Authorization Workflow Overview-Approve

12. Select the **Approve** button to approve the travel authorization. The status changes to Approved. INFORMS automatically enters the approver's name and user ID.

**MIAMI-DADE COUNTY**

**Approve Transactions**

**Overview**

**Action History**

Role	Name	Action	Date/Time
Employee	MONTERO,ARLIN	Submitted	01/27/2022 3:38:57AM

**Comments**

Budget Checking completed. Report is ready for Approval/Posting.

Budget Status Valid

[Budget Options](#)

**Approve** **Send Back** **Hold** **Deny** **Save Changes**

[Return to Approval List](#) [Next in List](#) [Previous in List](#)

# Lesson 2: Travel Authorization Workflow Overview, Continued

## Budget Check Travel Authorization

**Note:** If you use budget checking, INFORMS deactivates the **Approve** button if determine the travel authorization request needs to be budget-checked prior to approval

13. Select **Budget Option** button.

- Select **Budget Check**
- Select **OK**

Budget Checking completed. Report is ready for Approval/Posting.

Budget Status: Valid

Budget Options

Approve Send Back Hold Deny Save Changes

### Commitment Control

Help

#### Commitment Control Details

Source Transaction Type	Travel Authorization
Budget Checking Header Status	Valid
Commitment Control Amount Type	Encumbrance
Commitment Control Tran ID	0000008802
Commitment Control Tran Date	01/27/2022 Override Transaction

Budget Check

Go to Transaction Exceptions

OK Cancel

Go To Activity Log

# Lesson 2: Travel Authorization Workflow Overview, Continued

## Budget Check Travel Authorization

14. Use the **Save Confirmation** page to review a summary of the travel authorization before confirming the submission. Select the **OK** button.

**Save Confirmation**

[Help](#)

[Approve Travel Authorization](#)

**Submit Confirmation**

ARLIN MONTERO      Authorization ID 0000000081

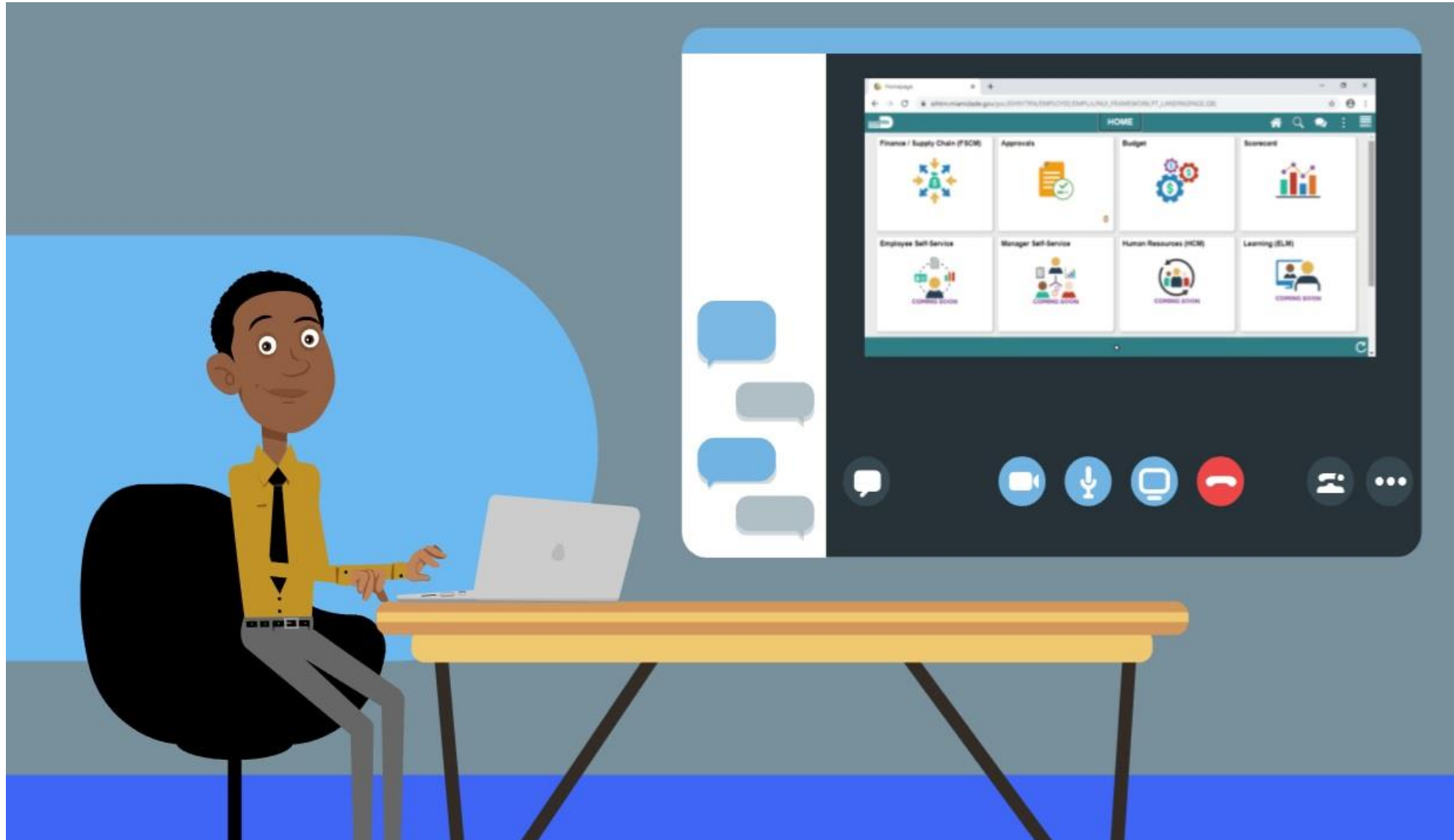
**Travel Authorization Totals**

Total	100.00 USD	Total Authorized	100.00USD
Less Non-Approved	0.00 USD		

✓ This report will be approved.

**OK** Cancel

# Lesson 2: Activities and Exercises



# Lesson 2: Lesson Summary

Now that you have completed the Travel Authorization Workflow Overview lesson, you should be able to:

- Identify the Travel Authorization Workflow Overview
  - Process
  - Approve
  - Denied
  - Push back
- Demonstrate the steps in navigation for Travel authorization and its process



# Lesson 3: Maintain Travel Authorization

## Objectives/goals of lesson

- Modify a Travel Authorization which was sent back

# Lesson 3: Maintain Travel Authorization

## TRAVEL AUTHORIZATION BUSINESS PROCESS

### Department Employee



### Department Employee

The Employee is responsible for preparing and submitting Travel Authorizations.

### Department Travel Compliance Review



### Travel Liaison

Department compliance role responsible for preparing/reviewing, and approving Travel Authorizations. Ensures that travel request adheres to County Travel Policy and Procedures Manual.

### Review/Approve Employee Travel Request



### Supervisor

Employee's Direct (Epar) Supervisor responsible for Travel Authorization requests and Expense Reports approval.

### Review/Approve Department Travel Request



### Department Director

Approver role responsible for reviewing/approving travel requests for the Department.

### Review/Approve Travel Request



### Chiefs

Approver role responsible for reviewing/approving travel request.

### Review/Approve Department Group/International Travel Request



### Mayor

Approver role responsible for reviewing/approving travel requests for international and group and legislative travel.

### Central Travel Advance Review and Process



### Central Travel and Expense Processor

Central compliance role responsible for processing Travel Advance requests.

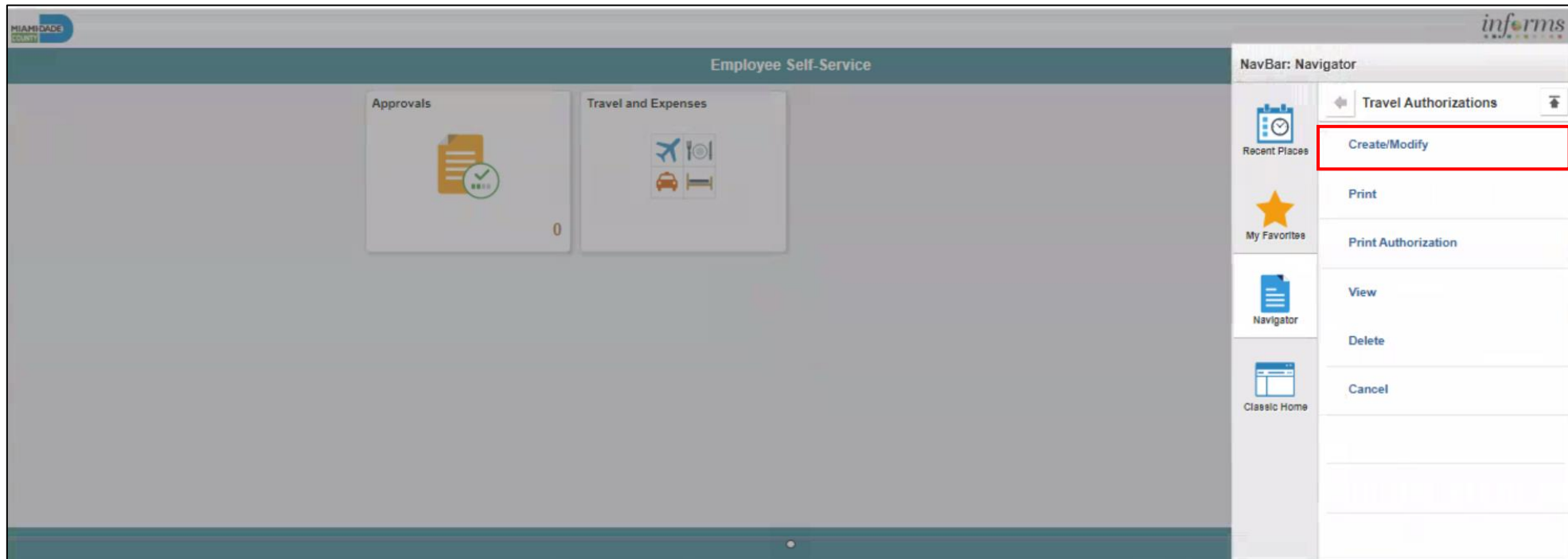
# Lesson 3: Key Terms

Term	Definition
<b>Send Back</b>	The Send Back button allows users to return the travel authorization to the employee for correction or revision.
<b>Travel Authorization</b>	Permission for work related travel, if the trip requires prior approval from a supervisor, administrator, or applicable department head.
<b>Travel and Expenses</b>	uses standard permission list security and may be used for centralized or delegated entry of expense reports.

# Lesson 3: Maintain Travel Authorization

## Modify a Travel Authorization which was sent back by approver

1. Navigate to: **Menu > Navigator > Finance/Supply Chain > Employee Self-Service > Travel and Expenses > Travel Authorizations > Create/Modify**



# Lesson 3: Maintain Travel Authorization

## Modify a Travel Authorization which was sent back by approver

2. Select **Find an Existing Value** and Select **Search**.

The screenshot displays the 'Travel Authorization' interface within the 'informs' system. The header includes the Miami-Dade County logo, a 'HOME' link, the title 'Travel Authorization', and navigation icons for home, search, chat, and a menu. Below the header, the 'Travel Authorization' section contains a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' A search input field with the placeholder 'Enter your search term' is present. Two buttons are visible: 'Find an Existing Value' (highlighted with a red box) and 'Add a New Value'. Under the 'Search Criteria' section, there is a 'Search by:' dropdown menu set to 'Empl ID' and a 'begins with' input field containing '000'. A 'Search' button (highlighted with a red box) and a link to 'Advanced Search' are located below the search criteria. At the bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

# Lesson 3: Maintain Travel Authorization

## Modify a Travel Authorization which was sent back by approver

3. Select a **Pending** Authorization that was sent back by the approver.

**Employee Self-Service** **Modify Travel Authorization** **inform**

ARLIN MONTERO [?](#) [Save for Later](#) [Summary and Submit](#)

**Sent Back For Review** By: BELLO, JOAQUIN NAPOLEON [Update the details](#) Actions: [...Choose an Action](#) [GO](#)

\*Business Purpose: Education [v](#) Default Location: Rio de Janeiro [v](#) Authorization ID: 0000000046 Pending [v](#)

\*Description: Learn [v](#) \*Date From: 10/16/2020 [v](#) \*Date To: 10/17/2020 [v](#) Reference: [v](#)

☐ Vacation Combined with Trip [Attachments](#)

**Projected Expenses** [?](#) [Expand All](#) | [Collapse All](#) Add: [Quick-Fill](#) Totals (1 Line) 30.00 USD

*Date	*Expense Type	Description	*Payment Type	*Amount	Currency	+ -
10/16/2020 <a href="#">v</a>	Luggage <a href="#">v</a>	travel <a href="#">v</a>	Check <a href="#">v</a>	30.00	USD	
*Billing Type: Internal <a href="#">v</a>						

[Accounting Details](#) [?](#)

[Expand All](#) | [Collapse All](#) Totals (1 Line) 30.00 USD

# Lesson 3: Maintain Travel Authorization

## Modify a Travel Authorization which was sent back by approver

### 4. Review the Travel Authorization for Comments.

The screenshot shows the 'Modify Travel Authorization' page in the 'Employee Self-Service' portal. The page header includes the Miami-Dade County logo and the 'informs' logo. The main title is 'Modify Travel Authorization'. Below the title, there are links for 'Save for Later' and 'Summary and Submit'. The user 'ARLIN MONTERO' is logged in. The status is 'Sent Back For Revision'. The 'By' field is 'BELLO, JOAQUIN NAPOLEON'. The 'Update the details' link is highlighted with a red box. The 'Business Purpose' is 'Education' and the 'Description' is 'learn'. The 'Default Location' is 'Rio de Janeiro'. The 'Authorization ID' is '0000000046' and the status is 'Pending'. The 'Date From' is '10/16/2020' and the 'Date To' is '10/17/2020'. The 'Reference' field is empty. The 'View Approver Comments' modal is open, showing the 'Approver's Comments' section with the following details: Name: BELLO, JOAQUIN NAPOLEON, Action: Sent Back For Revision, Date/Time: 11/04/2020 11:19:17AM, and Comment: Update the details. A red arrow points from the 'Update the details' link in the main form to the 'Comment' field in the modal. A 'Return' button is visible at the bottom left of the modal.

**Modify Travel Authorization**

Employee Self-Service

ARLIN MONTERO

Sent Back For Revision

By: BELLO, JOAQUIN NAPOLEON

\*Business Purpose: Education

\*Description: learn

Default Location: Rio de Janeiro

\*Date From: 10/16/2020

\*Date To: 10/17/2020

Authorization ID: 0000000046 Pending

Reference:

Update the details

**View Approver Comments**

Approver's Comments

Name: BELLO, JOAQUIN NAPOLEON

Action: Sent Back For Revision

Date/Time: 11/04/2020 11:19:17AM

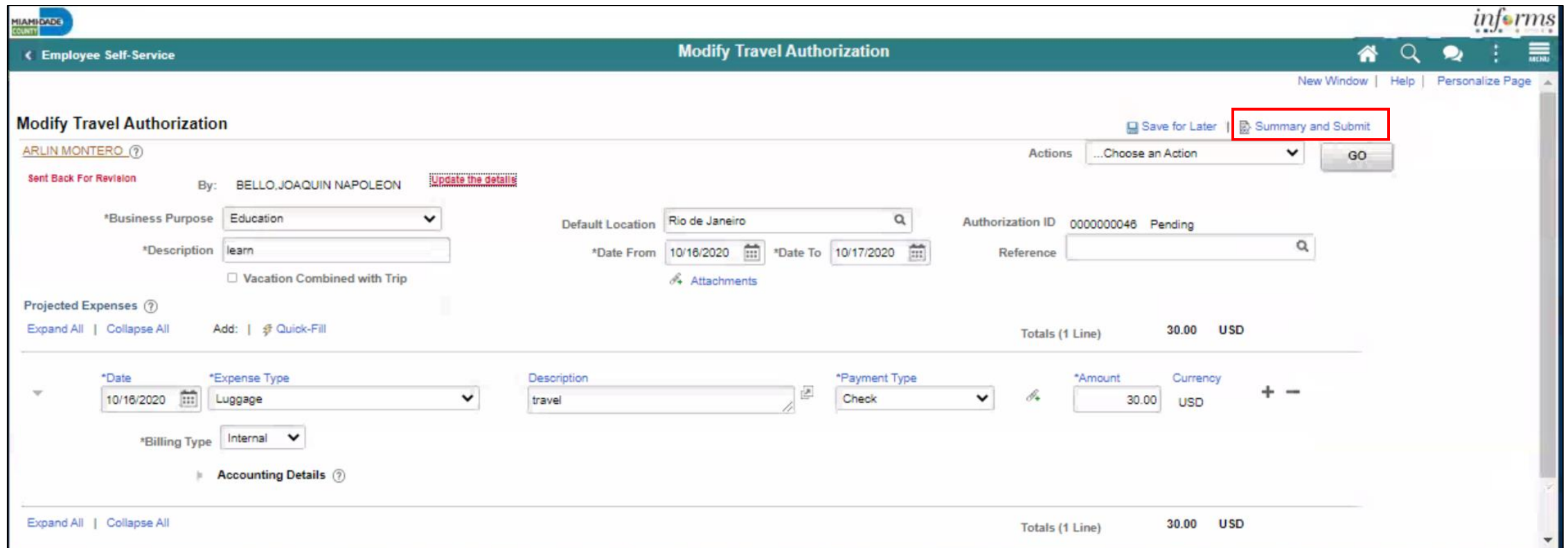
Comment: Update the details

Return

# Lesson 3: Maintain Travel Authorization

## Modify a Travel Authorization which was sent back by approver

5. If comments are addressed and no further action is needed, Select the **Summary and Submit**.



**Employee Self-Service** **Modify Travel Authorization** **informs**

[New Window](#) | [Help](#) | [Personalize Page](#)

**Modify Travel Authorization** [Save for Later](#) **Summary and Submit**

[ARLIN MONTERO \(?\)](#) [Update the details](#)

**Sent Back For Revision** By: BELLO, JOAQUIN NAPOLEON

\*Business Purpose: Education  
\*Description: learn  
☐ Vacation Combined with Trip

Default Location: Rio de Janeiro  
\*Date From: 10/16/2020 \*Date To: 10/17/2020  
[Attachments](#)

Authorization ID: 0000000046 Pending  
Reference:

**Projected Expenses (?)**  
[Expand All](#) | [Collapse All](#) Add: [Quick-Fill](#)

Totals (1 Line)		30.00	USD			
*Date	*Expense Type	Description	*Payment Type	*Amount	Currency	+ -
10/16/2020	Luggage	travel	Check	30.00	USD	
*Billing Type		Internal				
<a href="#">Accounting Details (?)</a>						
Totals (1 Line)		30.00	USD			

[Expand All](#) | [Collapse All](#)



# Lesson 3: Maintain Travel Authorization

## Modify a Travel Authorization which was sent back by approver

6. Check the box. Select the **Submit** button to show the Confirmation pop-up window.

**Employee Self-Service** **Modify Travel Authorization** *informs*

ARLIN MONTERO

\*Business Purpose: Education  
\*Description: learn  
☐ Vacation Combined with Trip

Default Location: Rio de Janeiro  
\*Date From: 10/16/2020  
\*Date To: 10/17/2020  
Reference:

Authorization ID: 0000000046 Pending  
Created: 10/16/2020 ARLIN MONTERO  
Last Updated: 11/04/2020 JOAQUIN BELLO

Totals ① View Printable Version Notes Attachments

Projected Expenses (1 Line)	30.00 USD	Denied Expenses	0.00 USD
Total Authorized Amount		30.00 USD	

☒ By checking this box, I certify these costs are reasonable estimates and comply with expense policy.

**Submit Travel Authorization**

# Lesson 3: Maintain Travel Authorization

## Modify a Travel Authorization which was sent back by approver

7. Select **OK**.

**Note:** Travel Authorization page is displayed and submitted for approval. Authorization ID has been assigned

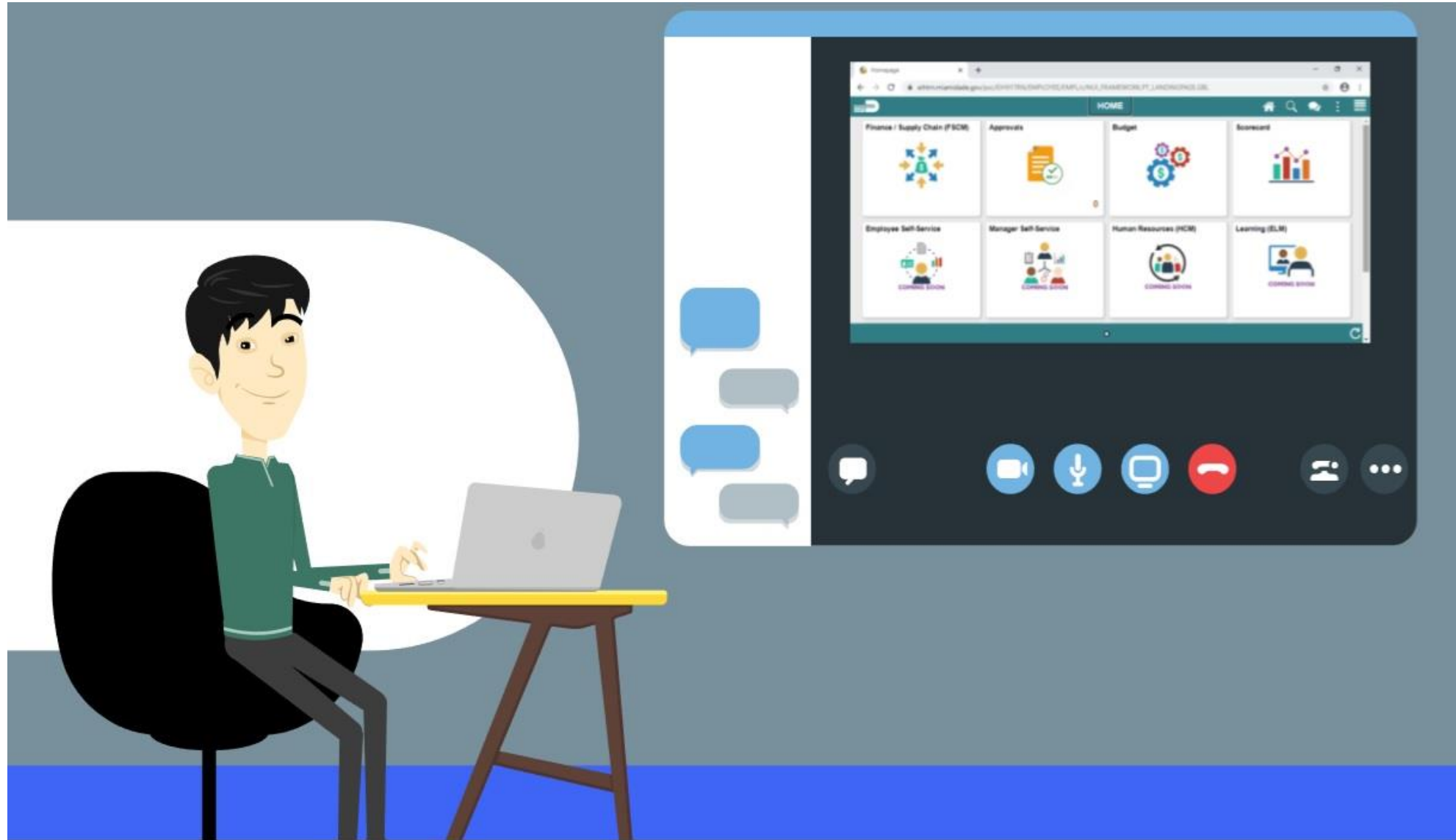
The screenshot displays the 'Create Travel Authorization' web application interface. A modal dialog titled 'Travel Auth Submit Confirm' is overlaid on the main form. The dialog contains the following information:

- Create Travel Authorization**
- Submit Confirmation**
- ARLIN MONTERO**
- Totals** (with a help icon)
- Total Authorized Amount** 10.00 USD
- OK** and **Cancel** buttons

The background form shows the following details:

- Create Travel Authorization**
- ARLIN MONTERO**
- \*Business Purpose** Meeting
- \*Description** test
- Vacation Combined with Trip**
- Totals** (with a help icon)
- View Printable Version**
- Projected Expenses (1 Line)** 10.00 USD
- ☒ **By checking this box, I certify these costs are reasonable estimates and comply with expense policy.**
- Submit Travel Authorization** button

# Lesson 3: Activities and Exercises



# Lesson 3: Lesson Summary

Now that you have completed the Maintain Travel Authorization lesson, you should be able to:

- Modify a Travel Authorization which was sent back by approver

# Module 3: Course Summary

## Module Topics

Course Content Summary

Additional Training and Job Aids

Course Summary

# Course Content Summary

- Congratulations on completing the Travel Authorization. You now understand:
  - Create and submit Travel Authorization Overview
  - Travel Authorization Workflow Overview (process, approve, deny, push back, etc.)
  - Maintain Travel Authorization Overview

For more information on INFORMS, please visit [www.miamidade.gov/informs](http://www.miamidade.gov/informs)

# Additional Training and Job Aids

If you have further questions about any of the topics presented in this course, use the following resources:

## User Productivity Kits

- Create and Submit Travel Authorization Overview
- Viewing Travel Authorization status
- Travel Authorization Workflow Overview for Approving
- Travel Authorization Workflow Overview for Denying
- Travel Authorization Workflow Overview for Send Back
- Modify Travel Authorization Sent Back By Approver

For additional information, be sure to visit: [www.miamidade.gov/informs](http://www.miamidade.gov/informs)



Congratulations on successfully completing the Travel Authorization course!

**FIN 214: Travel & Expense: Travel Authorization**