Fleet Portal Delegation “How-To”

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Introduction

The feature we have been most asked about is here: the ability for travelers to delegate to others the right to view and create reservations. Using the delegation system will eliminate the need to supply a Driver’s License number when creating a reservation for someone else – that person’s name can simply be selected from a pick list. At this time, only approved drivers can be selected as delegates.

*Note* - Travelers who wish to grant delegation rights must log in at least once to grant the rights. After that the travel arranger can view and create the reservations.

The driver wishing to delegate rights must first log in to the Physical Plant Portal and navigate to the “Car Fleet” section.
Profile Tab

Once the driver has navigated to the car fleet section, the “Profile” tab should be clicked.
Updating Car Fleet Profile

Before we begin the actual delegation process, please verify that all information in the “My Profile” section is accurate. Please note that any fields left blank will cause an error message. Update all fields accordingly and then press the “Update My Car Fleet Profile” button.
**Add Delegate**

Next, navigate to the right side of the “Profile” page (scrolling if necessary.) Look for the “Add Delegate” button.
Searching For Delegates

The next step is searching for the name of the person to whom you would like to delegate reservation rights. Do this by entering the name of the person in question and clicking the “Lookup” button. At this time, only authorized drivers can be added as delegates. Please check back about this in the future.
Finding Delegates’ Credentials

When the credentials of the person in question are displayed, simply click on their name to proceed.
Please take note of the box that says “View reservations only.” At a future date, you will be able to grant access to others allowing them only to view reservations made under your name. At this time “view only” is not functional. If you delegate to someone else they can view and create reservations. Please check back about this in the future.
Operators I Have Delegated To

You will now see the delegate’s name displayed under the heading “Operators I have delegated to.”
Delegation Deletion

If, at a later time, you would like to remove the delegation rights of a certain person, simply click on the “Delete” button next to that person’s name.
Operators That Have Delegated To Me

You are also able to see the names of those that have delegated rights to you. You can also remove yourself from delegated responsibilities by clicking on the “Delete” button. If you’re interested only in the delegation process, you can stop here. If you’re also interested in the reservation process please continue.

<table>
<thead>
<tr>
<th>Operator Name</th>
<th>Effective Date</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>GARY L NELSON</td>
<td>12/30/2006 10:19:45 AM</td>
<td>False</td>
</tr>
<tr>
<td>JAMES J BOGAN</td>
<td>11/29/2006 8:28:19 AM</td>
<td>False</td>
</tr>
</tbody>
</table>
Creating A New Reservation

After all delegate information is complete, click on the “New Reservation” tab to begin the reservation process.
Choose Driver

You will now choose for whom the reservation is being made. Select the appropriate radio button (circled in red.)
Creating A Reservation For Myself

If the reservation is for you, make sure that the “Myself” radio button is selected and then press the “Select Funding” button.
Creating A Reservation For A Driver Delegated to Me

If you are making a reservation for a driver that has granted rights to you, select the “Driver Delegated to Me” button. Using the drop-down menu, select the name of the driver and then click on the “Select Funding” button.
Entering Driver Credentials

If the driver for whom the reservation is being made has not yet granted rights to you, the driver’s credentials can still be entered. Click on the “Driver Credentials I Provide” button, enter the necessary information in the appropriate fields, and then click on the “Select Funding” button.
Using Existing Funding

If the funding you would like to use for this reservation is listed, simply click on the appropriate red “T” number to proceed. Please skip to page 19 to continue the reservation process or the next page if the desired funding is not listed.
Entering A “T” Number

If you have a “T” number that you’d like to use but it’s not yet listed, enter the letter “T” followed by the unique eight digits in the appropriate field. Next, click on the “Proceed Using “T” Number Entered” button. Please skip to page 19 to continue the reservation process or the next page for “I need help with funding.”
“I Need Help With Funding”

If you’re unsure of the funding you’d like used for the reservation, click on the “I Need Help With Funding Button.”
“I Need Help With Funding” cont.

After clicking the “I Need Help With Funding” button, enter as much information as possible. At the very least, a name, phone number, and email address of the department’s financial contact must be entered. If you know all or part of a funding string or requisition number, select the appropriate radio button and enter the information in the appropriate field(s) and then click on the “Proceed to Reservation Details” button. If you don’t have any funding information, click on the “I don’t have a funding string or req number” button and then on the “Proceed to Reservation Details” button.
Entering Reservation Details

You can now enter the details of your desired reservation. All fields highlighted with red must be filled out. When all details are entered, press the “Make Reservation” button.
Confirmation Screen

After you have successfully created a reservation you will be shown a reservation summary. To make another reservation for the same driver, click on the “Make Another Reservation For This Driver” button. You will be redirected to the reservation details screen where you have the ability, if necessary, to adjust reservation parameters.