Travel Approval

Commencing 17 November 14 all new travel approval applications for staff and students will be made through the Travel Approval process.

Travel applications already in progress will continue to completion through existing process.

The Travel Approval process automates, streamlines and simplifies the application and approval of travel requests. Currently this process is undertaken through the completion of up to 10 paper based forms, with multiple manual delegation signoffs and submissions.

The Travel Approval process is a business process which guides the traveller, based on policy based procedural rules, in completing the Travel Approval eForms and routes these applications to supervisors and delegates for approval. Travel Approval information is also pushed to Finance and HR systems.

The Travel Approval process enables a traveller to create and track the progress of a submitted travel approval, and access previously completed forms which can be used as the basis for new requests.

Please note the Travel Approval process requires a broad overview of intended travel for approval purposes only and is not a travel itinerary. A travel itinerary is obtained once travel approval is granted and all travel bookings are confirmed and paid. This is usually provided by your travel agent or administrator.

Access

The Travel Approval process is completed by the traveller by accessing the Travel Approval eForm portal using their University ID and password.

The eForm portal can be accessed at the following locations;

ANU Travel Approval website page  https://eforms.anu.edu.au/Infiniti_Prod/Produce/

ANU website Staff page

Accessing Off Campus

The Travel Approval process uses a web based system and can be accessed anywhere an internet connection can be established. It is ready for use on most mobile devices (phones, tablets, iPads etc.).

If accessing the eForms system off-campus, the traveller should be able to access the Travel Approval by clicking on the eForms-Travel logo on the ANU Staff page.

Should there be any connection problems it might be necessary to first connect to the ANU Virtual Private Network (VPN) before accessing the eForms. For assistance on setting up the VPN go to http://itservices.anu.edu.au/it-security/vpn/.
Travel Approval Process Overview

The Travel Approval Process;

1) Consolidates various existing forms, including; travel application, risk assessment, fieldwork, budget, insurance, delegation approval, reimbursement request, etc.

2) Automatically authenticates the identity of the traveller applying for travel (via Uni ID and password)

3) Has a range of in built validation checks to ensure all required areas of the Travel Approval are complete

4) Allows the attachment of supporting documents

5) Automatically checks the DFAT website for countries at risk

6) Automatically updates the University’s HR and Finance enterprise systems with travel details

Steps in the Travel Approval Process

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Preparation</th>
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<tr>
<td>All travellers know the purpose and destination of their travel and some preparation is required in completing the Travel Approval. This includes knowing the expected dates of travel, travel cost quotes or estimates and if possible the account to which the cost of travel will be attributed.</td>
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<tr>
<th>Step 2</th>
<th>Complete and Submit the Travel Approval eForm</th>
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<tr>
<td>Traveller completes the Travel Approval eForms and submits. The Travel Approval can be saved and retrieved anytime during the process. If necessary the traveller can cancel the request once submitted.</td>
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<tr>
<th>Step 3</th>
<th>Supervisor and Delegate Approval</th>
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<tr>
<td>The completed Travel Approval is sent to the relevant supervisor for approval. Further routes the travel approval to other University staff for special approvals for overseas travel, such as high risk travel. The supervisor or delegate can request further information from the traveller prior to approval</td>
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<tr>
<th>Step 4</th>
<th>Traveller Notification</th>
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<td>Automatically advises the traveller of approval by email with an attached PDF Travel Approval Summary. The Travel Summary is a concise record of the Travel Approval information.</td>
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<th>Step 5</th>
<th>Post Travel Diary</th>
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<tr>
<td>Once the traveller returns they are required to complete the post travel diary to update any change in travel and/or travel costs.</td>
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Travel Approval Process Flow
Support and Instructional Tools

While the Travel Approval Process is intuitive and easy to use, a series of support structures are already in place and being established to support travellers, staff and delegates.

Travel Approval Quick Reference Guide – Pre Travel Approval

- General Travel Information: Overview of traveller and travel information (e.g., if you have more than one role, select the role under which you will undertake the travel)
- Purpose of Travel: Specific details regarding purpose of travel (e.g., travel purpose: e.g., meeting, conference, fieldwork)
- Travel Plan: Overview of each segment/phase of travel (e.g., dates of each segment of travel, type of travel: e.g., business/individual)
- Travelling to High Risk Destination: If a High Risk Destination was selected, the travel plan: Ensure flights are flexible, provide emergency evacuation plan
- Fieldwork: Where fieldwork was selected, specific details regarding the fieldwork to be undertaken
- Risk Assessment: Where fieldwork or a high-risk country has been selected: Identify any risks, include controls to mitigate risk, remaining risk after implementation of risk controls
- Emergency Contact: Contact details of traveller in case of emergency: Phone or email contact, details of accommodation, other instructions
Quick Reference Guide for Travel Approval eForm overview

User Reference Guide for detailed step by step instruction in completing each page of the Travel Approval eForm

FAQs (Frequently Asked Questions)

Video Guides (in development)

Travel Approval Reports (in development)

Travel Policy

Travel Policy and Procedures include a number of forms that have been included in the online Travel Approval Process.

Some of these forms may be required to complete in progress travel approvals. Links have been placed against each form advising travellers that;

“The below form is only to be used in relation to travel approved before Monday 17 November 2014, for all other travel please use the online Travel Approval Process above.”

A full review of the Travel Policy and associated procedures commences Tuesday 18 November 14.
Travel Approval Reports

Travel Approval Reports increase the ability to manage Travel Approvals. A series of reports are being produced with information such as; date and country location of travellers, changes to DFAT risk rating of countries, summary of information provided in submitted Travel Approvals etc.

If you would like access these reports please send an email to insight@anu.edu.au

Familiarisation Coaching Sessions

A series of familiarisation and coaching sessions are available to travellers and staff providing instruction, guidance or simply answering questions re the use the Travel Approval online process.

The session is conducted in a computer lab and is hands on. If you would like to become familiar with the Travel Approval eForms or complete your Travel Approval form for an upcoming trip please register through HORUS. How long you stay is your choice. Members of the Travel Approval Support Team and Travel Approval Champions will be there to assist you.

If you have just one or a two questions, or need to be taken through one particular step of the Travel Approval, you are very welcome to simply drop in without have registering. The HORUS Couse and session codes are below

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<tr>
<th>Course Code</th>
<th>Session Number</th>
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Getting Help and Assistance

Help Desk

The Travel Approval Support Team are located with Finance & Business Services and provide assistance on how to complete a travel form and are the first point of call for any issues/errors that may occur.

• Travel Approval help desk access number 54321, then option 1 (Central), then option 6 (Travel Approval)

• Email address for any enquiries Travel.approval@anu.edu.au

Note: The team does not provide support for organising travel, flight, conference, accommodation bookings – this is the responsibility of the traveller

Feedback and Improvement suggestions

Request for changes to the travel form and related workflow can be sent to Travel.approval@anu.edu.au

Requests will be evaluated in context of University requirements by a panel

PPM Help Desk

Planning Performance and Measurement (PPM) Division Helpdesk provide support with any questions regarding the reports and can be contacted insight@anu.edu.au

Travel Approval Champions

Travel Approval Champions provide support for travellers and staff in the use of the new Travel Approval Process. They will facilitate and guide travellers on where to access assistance and if possible guide travellers in the completion of the travel approval