Quick Reference Guide – Maintain Traveller Profile Form

University of South Australia

Purpose: This guide provides an overview on how staff (and/or their nominated Travel Coordinators) and University students can maintain a 'traveller profile' for the purpose of booking travel with the University's Travel Team or via Serko (the University's online booking tool for eligible staff to self-book domestic-only travel).

Please note: Travel Coordinators can only maintain a traveller profile on behalf of another staff member after:

- *they have first created their own traveller profile;*
- *the Travel Team has obtained approval to add them to the list of nominated Travel Coordinators for their ORG2; and*
- *the staff member has appointed them as a Travel Coordinator within their traveller profile, as described below.*

References: Refer to the Travel Guidelines on the Finance Unit's website.

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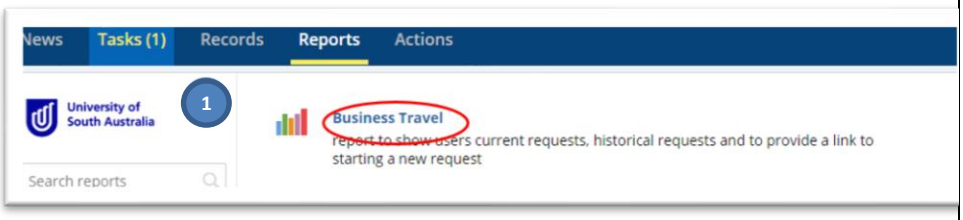
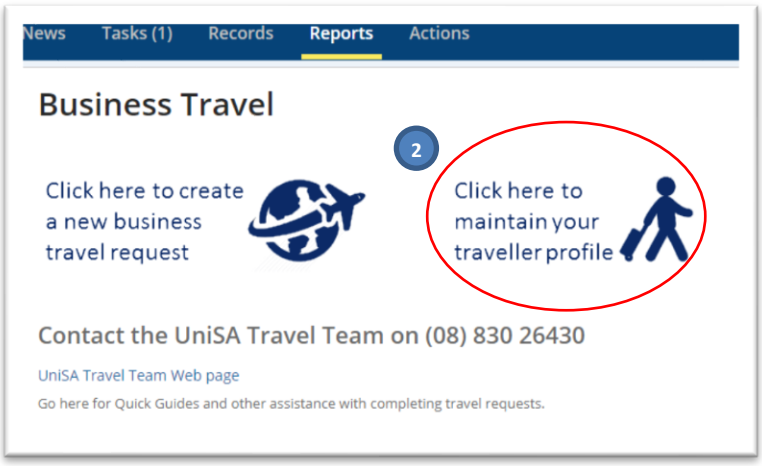
Launch the Form in Appian

Launching the Form ***Please note:*** *Save this link in your favourites.*	To access the traveller profile form, click on the following link: Business Travel Portal If prompted, use your UniSA username and password to access the Appian site.
1. Click on the *Business Travel* link.	
2. Click on the link: *Click here to maintain your traveller profile.*	

Completing a Traveller Profile

Travellers (inc. staff and students) and Travel Coordinators are required to complete all of the mandatory fields (fields with a *) to ensure the traveller profile is completed prior to booking travel.

Personal Information – new profile/existing profile

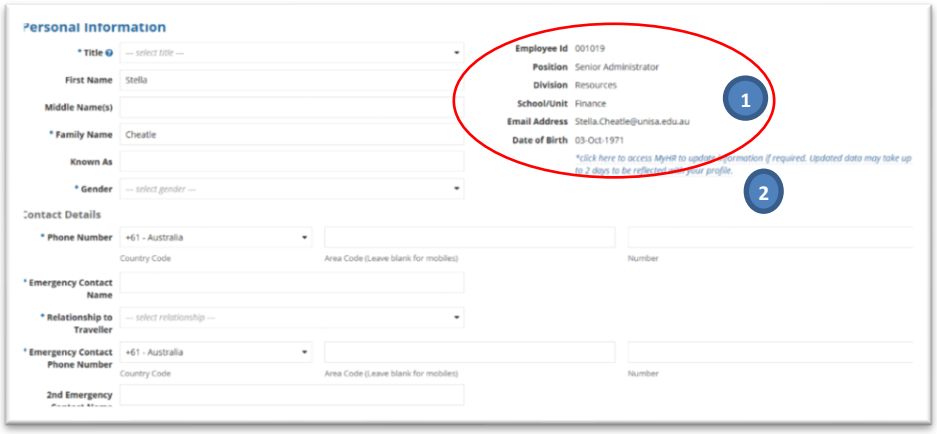
1. Some of the fields in the Personal Information section will be pre-populated from your staff/student record in the MyHR or Medici system.
2. If any of the information displayed in the non-editable fields is incorrect, then <u>before proceeding</u>:

   staff must click on the link to update their staff record in MyHR; or

   students must amend their details within Medici,

   and then complete the traveller profile.

Please note: *Updated data may take up to two days to be reflected within your profile.*

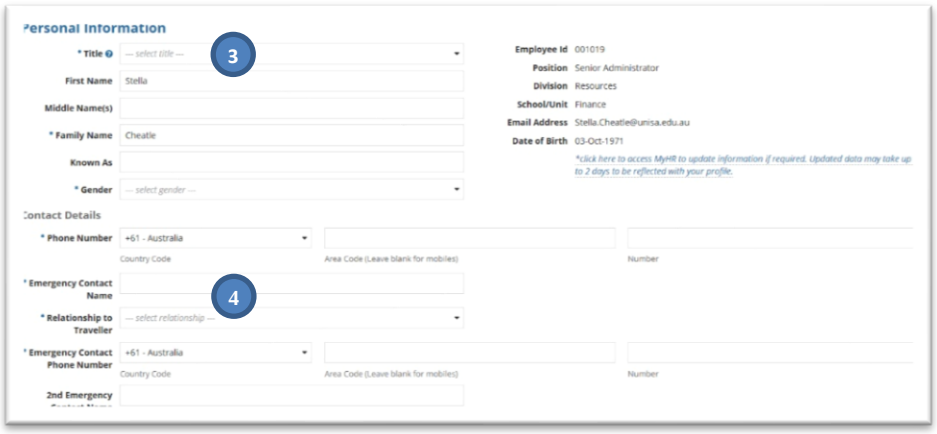


3. Select a title from the drop-down 'picker'.

   Please note: honorary and professional titles (e.g. Dr, Prof, Assoc Prof, Hon, Sir) are not available, as these titles cannot be processed by all global travel systems.

4. The profile requires contact details for at least one Emergency Contact person. Additional fields will appear if adding a second contact person.

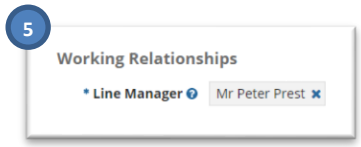
Please note: *For mobile phone numbers, the Area Code field must be blank.*



Working Relationships

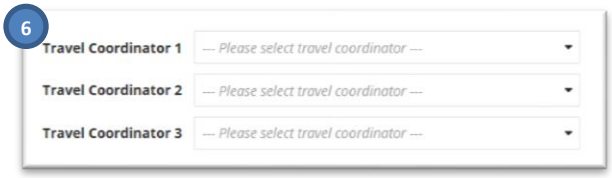
5. **Line Manager/Supervisor** – If you are eligible to use Serko, the line manager in your profile will be notified of each booking you make. Your immediate line manager will be pre-populated from the HR system. If the name displayed is not correct or needs to be amended due to temporary changes in reporting lines, click the 'x' beside the name to remove it and the field will become editable to search for the correct manager's name.

Please note: *Students participating in study overseas programs (i.e. student exchange, short-term study overseas programs, or a study tour), please list your program director.*



6. **Travel Coordinators** – Staff can appoint up to three Travel Coordinators from your local area to view and edit your profile, and to administer travel bookings on your behalf. You may only choose from those persons that have been nominated by your HoS/Director as listed in the pickers. You should seek agreement from your local area before appointing any Travel Coordinators.

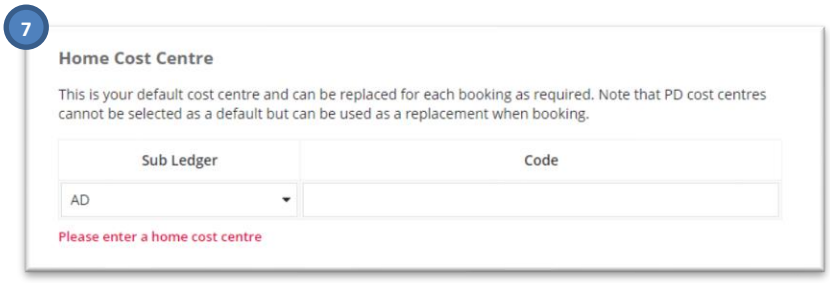
Please note: *Students and visitors cannot select Travel Coordinators.*



7. **Home Cost Centre** – Use the Sub Ledger picker and Code field to specify the default ('home') cost centre that you wish to use for your travel bookings. This cost centre will be pre-populated on your business travel requests and can be replaced for each booking within Serko, as required.

***Please note**:*

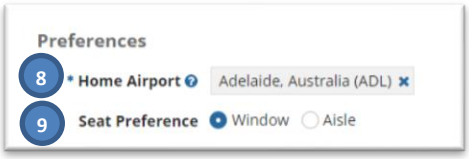
- *A cost centre is only required within the Business Travel Request form when the University is paying for any part of the trip; however this is a mandatory field within the profile. Students should contact their Supervisor to obtain the specific cost centre to be utilised.*
- *PD cost centres cannot be selected as the home cost centre but can be specified at the time of booking.*

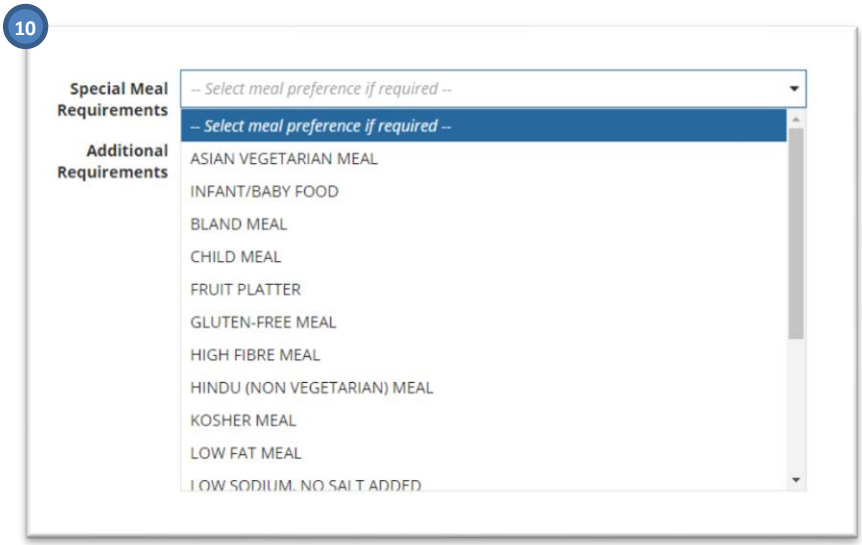


Preferences

8. **Home Airport** – If you are eligible to use Serko, your starting location will default to the home airport specified in your profile. This is initially set to Adelaide, but can be changed to another airport by clicking on the 'x'.
9. **Seat Preference** – You can nominate your preference for window or aisle seating. Your seat preference will be pre-populated in Serko and business travel requests as your default preference.
10. **Special Meal Requirements** – A list of nominated dietary requirements is listed in the drop-down field for selection. Your dietary requirements will be pre-populated in business travel requests as your default preference.

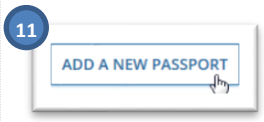
***Please note:** Preferences you have set-up with your personal frequent flyer programs will normally take precedence over those specified in your profile.*





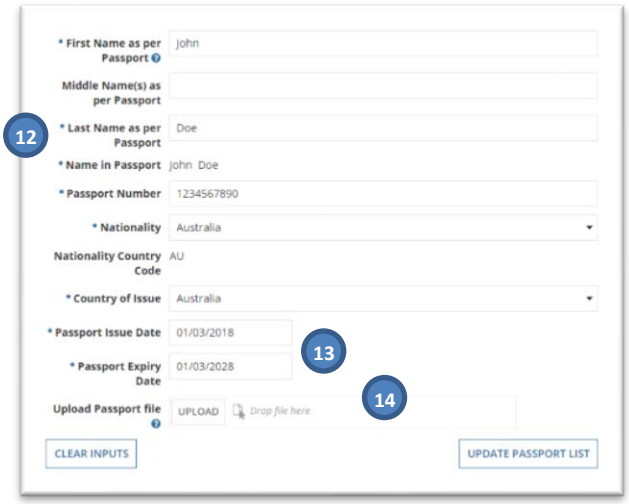
Passport Details

11. **Add a New Passport** – will allow you to add your passport information. These details will be stored against your profile and used by the Travel Team. Multiple passports can be stored in this section.



12. Add the passport details exactly as they appear in the passport document.
13. The passport expiry date will automatically default as 10 years from the issue date. This can be amended if the actual expiry date is different.
14. A scanned copy of the passport photo identification page must be uploaded into your traveller profile.

Please note: *Repeat the above steps for each additional passport.*

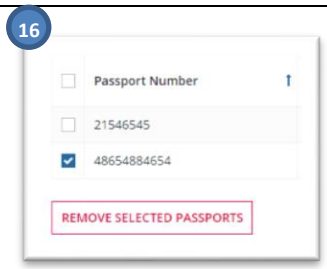


15. If you have multiple passports, you can select a primary (default) passport by clicking on the 'x'.

16. To remove a passport, tick the selection box to the left of the passport and click on Remove Selected Passports.

Please note:

- *You must have at least six months validity on your passport from the date for return to Australia to be allowed to travel.*
- *The system will automatically notify you via e-mail when your passport has less than nine months validity.*



Visa Details

17. **Add a New Visa** – allows you to add details of your active visas. These details will be stored against your profile to be used by the Travel Team.

    Multiple visas can be stored in this section.

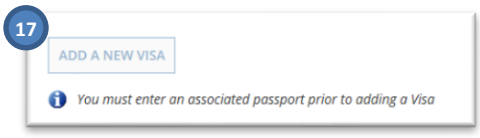
Please note:

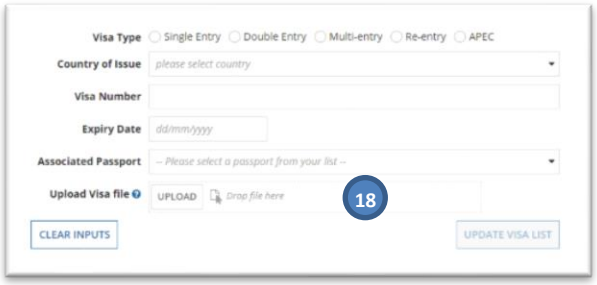
- *You must first add the passport which the visa is associated with before you can add the visa.*
- *If you are in the process of applying for a visa, once received, please update your profile ASAP.*

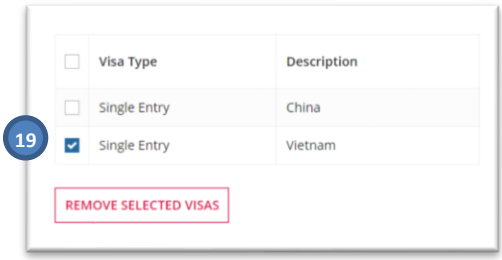
18. A scanned copy of each visa must be uploaded when adding the visa.

Please note: *You can repeat the above steps for each additional visa.*

19. To remove a visa, tick the selection box to the left of the visa and click on Remove Selected Visas.







Loyalty Programs

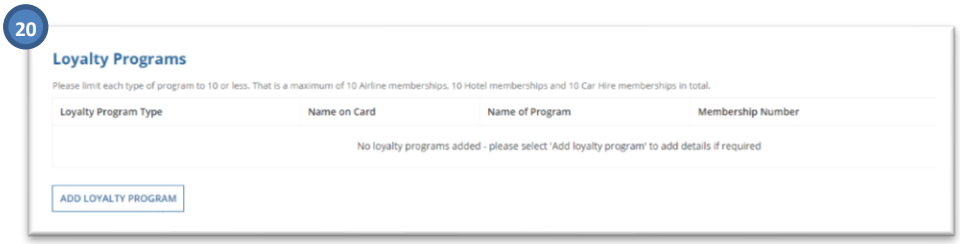
20. **Add Loyalty Program** – allows you to add details of any loyalty schemes with airlines, hotels or car hire companies.

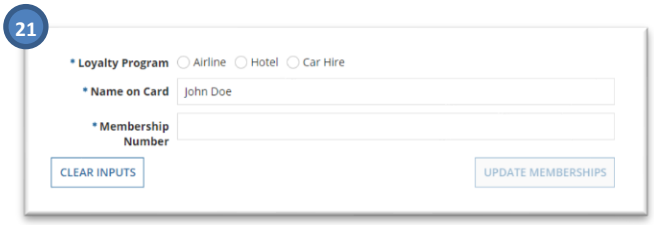
21. Select the program type, complete the program details and click **Update Memberships** to add the program to your profile.

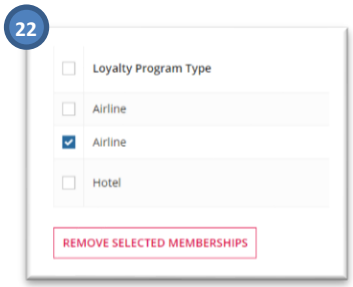
Please note: *You can repeat the above steps for each additional loyalty program.*

22. To remove a loyalty program, tick the selection box to the left of the loyalty program and click on Remove Selected Memberships.

Please note: *A maximum of 10 schemes can be added to your profile for each type of program (airline, hotel and car hire).*

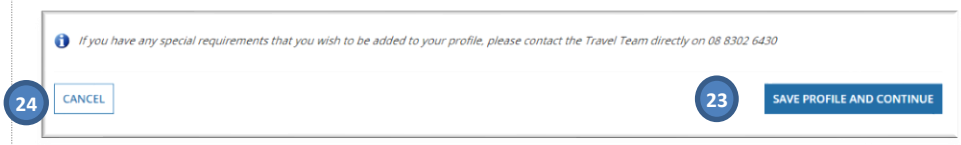






Action Buttons

23. **Save Profile and Continue** – updates your traveller profile and submits the update directly to the University's travel management company/ies (TMCs).

Please note: *Updated data may take up to 24 hours to be reflected within the profile held by TMCs.*

24. **Cancel** – clears the input from all the fields on the request.