Quick Reference Guide – Maintain Traveller Profile Form



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 <u>Travel Guidelines</u> on the Finance Unit's website.

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Launching the Form Please note: Save this link in your favourites.	To access the traveller profile form, click on the following link: <u>Business Travel Portal</u> If prompted, use your UniSA username and password to access the Appian site.			
1. Click on the <i>Business Travel</i> link.	News Tasks (1) Records Reports Actions Image: Search reports			
2. Click on the link: Click here to maintain your traveller profile.	News Tasks (1) Records Actions Business Travel Image: Click here to create a new business travel request Image: Click here to maintain your traveller profile Click here to create a new business travel request Image: Click here to maintain your traveller profile Click here to create a new business travel request Image: Click here to maintain your traveller profile Click here to create a new business travel request Image: Click here to maintain your traveller profile Click here to create the UniSA Travel Team on (08) 830 26430 Image: Click here to create the to the tot to the to the to the to the to the to the to			

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

- Some of the fields in the Personal Information section will be prepopulated from your staff/student record in the MyHR or Medici system.
- If any of the information displayed in the noneditable 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 dropdown '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.

 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.

* Title 😡	select title		-	Employee Id	001019	
				Position	Senior Adr	ninistrator
First Name	Stella		(Resources	
Middle Name(s)				School/Unit		
* Family Name	Cheatle					atle@unisa.edu.au
			`	Date of Birth		11 to access MyHR to updated formation if required. Updated data may take
Known As					to 2 days to	to access MyHR to update formation if required. Updated data may take in the reflected with your profile.
* Gender	select gender		-			2
ontact Details						
Phone Number	+61 - Australia	•				
	Country Code		Area Code (Leave blank for mobiles)			Number
Emergency Contact Name						
* Relationship to Traveller	select relationship		•			
Emergency Contact	+61 - Australia	•				
Phone Number	Country Code		Area Code (Leave blank for mobiles)			Number

* Title 😡	select title 3		-	Employee Id		
First Name	tula				Senior Adr	
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* Gender	select gender					
ontact Details						
* Phone Number	+61 - Australia	•				
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Emergency Contact Name	4					
* Relationship to Traveller	— select relationship —		-			
Emergency Contact Phone Number	+61 - Australia	•				
r none Humber	Country Code		Area Code (Leave blank for mobiles)			Number
2nd Emergency						

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.	Urrking Relationships • Line Manager • Mr Peter Prest ×
 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. 	Travel Coordinator 1 Please select travel coordinator Travel Coordinator 2 Please select travel coordinator Travel Coordinator 3 Please select travel coordinator

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.		st centre and can be replaced for each booking as required. Note that PD cost centres a default but can be used as a replacement when booking.	
Plea	ase 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.			
Pre	eferences			
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'.		Adelaide, Australia (ADL) X e Vindow Alsle	
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		
Plea	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. ase note: Preferences you have set- with your personal frequent flyer	Requirements Additional Requirements INFA BLA CHIL FRU GLU HIGI HINI KOS	Select meal preference if required Select meal preference if required Select meal preference if requi	
prog	grams will normally take precedence r those specified in your profile.	175-836	W FAT MEAL W SODIUM. NO SALT ADDED	

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.	ADD A NEW PASSPORT
 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. 	* First Name as per Passport john * Hindle Name(s) as per Passport De * Last Name as per Passport John De De * Name in Passport John De * Name in Passport 124567890 * Nationality Australia Nationality Australia * Nationality Australia * Country of Issue Australia * Passport Issue Date 01/03/2018 * Date 13 * Passport Issue Date 01/03/2028 * Dupload Passport Ii 14 Upload Passport Ii Uro.op Uploat Passport Ii Uploat Passport Ii
 If you have multiple passports, you can select a primary (default) passport by clicking on the 'x'. 	15 Primary Passport ©
 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. 	16 Passport Number 1 21546545 2 48654884654 REMOVE SELECTED PASSPORTS

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.	17 ADD A NEW VISA Image: The second
Multiple visas can be stored in this section.	Visa Type Single Entry Double Entry Multi-entry Re-entry APEC Country of Issue please select country • Visa Number
Please note:	Expiry Date did/mm/2009
• You must first add the passport which the visa is associated with before you can add the visa.	Associated Passport - Please select a passport from your list Upload Visa file 0 UPLOAD C for on file here CLEAR INPUTS UPDATE VISA LIST
 If you are in the process of applying for a visa, once received, please update your profile ASAP. 	
 A scanned copy of each visa must be uploaded when adding the visa. 	Visa Type Description
Please note: You can repeat the above steps for each additional visa.	Image: Single Entry China Image: Single Entry Vietnam
 To remove a visa, tick the selection box to the left of the visa and click on Remove Selected Visas. 	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.	20 Example
allows you to add details of any loyalty schemes with airlines, hotels or car hire	Loyalty Programs Please limit each type of program to 10 or less. That is a maximum of 10 Airline memberships. 10 Hotel memberships and 10 Car Hire memberships in total. Loyalty Program Type Name on Card Name of Program Membership Number
allows you to add details of any loyalty schemes with airlines, hotels or car hire companies. 21. Select the program type,	Loyalty Programs Please limit each type of program to 10 or less. That is a maximum of 10 Airline memberships. 10 Hotel memberships and 10 Car Hire memberships in total. Loyalty Program Type Name on Card Name of Program Membership Number No loyalty programs added - please select 'Add loyalty program' to add details if required
 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 	Loyalty Programs Please limit each type of program to 10 or less. That is a maximum of 10 Akrine memberships. 10 Hotel memberships and 10 Car Hire memberships in total. Loyalty Program Type Name on Card Name of Program Membership Number No loyalty programs added - please select 'Add loyalty program' to add details if required ADD LOYALTY PROGRAM
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 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 	Cuyalty Program type Name on Card Name of Program Memberships under Notigyaty Program Type Name on Card Name of Program Membership Number Cuyalty Program Type Name on Card Name of Program Membership Number Cuyalty Program Arline Hotel Car Hire Name on Card Join Doe Number Number Number Number Number Cuyalty Program UPDATE MEMBERSHIPS Cuter NIPUTS UPDATE MEMBERSHIPS Cupalty Program Type Image: State S
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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).	If you have any special requirements that you wish to be added to your profile, please contact the Travel Team directly on 08 8302 6430 CANCEL SAVE PROFILE AND CONTINUE
Please note: Updated data may take up to 24 hours to be reflected within the profile held by TMCs.	
 Cancel – clears the input from all the fields on the request. 	