Travel Management – Locomote user ‘Cheat Sheet’

Contents

1. LOGGING INTO LOCOMOTE .............................................................................................................. 2
2. SET UP / CONFIRM YOUR PROFILE ................................................................................................. 3
3. YOUR DASHBOARD ............................................................................................................................. 5
4. HOW DO I SUBMIT A TRIP REQUEST? .............................................................................................. 5
5. INFORMATION REQUIRED FOR INTERNATIONAL TRIP REQUESTS .................................................. 9
6. EXTERNAL FUNDING TRIP REQUESTS ............................................................................................. 10
7. CHANGING AUTHORISERS .............................................................................................................. 10
8. EDITING A TRIP ............................................................................................................................... 11
9. CANCEL A TRIP ............................................................................................................................... 12
10. WHAT DO THE STATUS LABELS MEAN? ......................................................................................... 13
11. INTERNATIONAL TRAVEL - HOW DO I SELECT A PREFERRED QUOTE / ITINERARY? .............. 14
12. HOW DO I SELECT / REMOVE A TRAVEL ARRANGER? ................................................................. 15
13. ARRANGER - HOW DO I CREATE / EDIT TRAVELLER PROFILES? .................................................. 15
14. ARRANGER - HOW DO I ORGANISE TRAVEL FOR TRAVELLERS? ................................................ 16
15. AUTHORISER - HOW DO I APPROVE / DECLINE A TRIP REQUEST? .......................................... 17
16. AUTHORISER - HOW DO I APPROVE / DECLINE A QUOTE / ITINERARY TRIP REQUEST OR REASSIGN TO ANOTHER APPROVER? .................................................................................. 18
17. AUTHORISER - HOW DO I DELEGATE MY DUTIES TO ANOTHER AUTHORISER? ...................... 19
18. CLASS OF TRAVEL AUTHORISATION ............................................................................................. 19
19. RISK AUTHORISATION .................................................................................................................... 20
20. USING DOMESTIC / NZ BOOK ONLINE (SERKO) ........................................................................... 20
21. TRIP PAYMENT(S) .......................................................................................................................... 23
22. LOGGING OUT OF LOCOMOTE ....................................................................................................... 24
23. PRIVATE TRAVEL ............................................................................................................................ 25
1. **LOGGING INTO LOCOMOTE**

   **PLEASE ONLY WORK FROM ONE SCREEN WHEN IN LOCOMOTE AS A DUPLICATION OF PROFILES AND TRIPS CAN ACCIDENTALLY BE CREATED.**

   The Locomote link is - [https://utas.locomotetmp.com/users/auth/shibboleth](https://utas.locomotetmp.com/users/auth/shibboleth)

   Enter your University of Tasmania *Username* and *Password*

   ![Login Screen](image)

   The first time you logon you will be required to *Accept* the terms and conditions to get into the system. If you do not wish to accept you will be unable to request travel. If you are unwilling to proceed and select *Reject* please email travel.admin@utas.edu.au for assistance / additional information.

   ![Accept Terms](image)

   If you still experience logging on difficulties please *contact* the ICT Service Desk (03) 6226 1818.
2. SET UP / CONFIRM YOUR PROFILE

Any changes to profiles are made via Locomote with these changes transferring to SERKO (the Domestic / NZ Booking tool).

If you are a new user you will be directed to a personalised welcome notice (apologies – a screenshot of this page is unavailable), and if you click on the link you will be taken to your profile information where you enter details as per the tabs below (for further information see the next page). Mandatory fields have a * asterisk.

If you have an existing profile (as a previous traveller), you may be required to update your profile. To do this click the Account menu on the top right hand corner of the screen. Select My Profile from the drop-down menu options. Alternatively you can click on Welcome, [Your Name] which is shown at the top of the Dashboard page. To save your profile information you need to complete the mandatory fields in each tab. When finished click Update Profile.
In the Personal Tab

of the profile please enter the appropriate details in the following areas of –

**Personal Details**

- Should you or your traveller happen to have 2 or more First Names or a hyphenated First name please ensure that you have entered these 2 names as 1 complete name with no spaces but with the capitalisation of the First letter of each name. Please apply this principle if there are 2 or more Surnames.

**Next of Kin**

**Time Zone**

**Organisation Details**

- In this area you are required to enter your employee ID in the *Employee ID* field
- If you are a booker you will be required to obtain this ID from your traveller to complete their profile – for University staff it is their payroll number
- If you are creating a profile for a student please enter the Students Identification number in the *Employee ID* field.
- For other University Travellers who do not have a University Identification Number (ID) please ensure that you have entered the Travellers Surname and First name as 1 complete name with no spaces but with the capitalisation of the First letter of each name.

- In the mandatory field of *Company Unit* please select *University Of Tasmania*.

- In Work Details please pay particular attention to the Email (noting that staff and student email points must reflect the UTAS Directory – no generic emails or shared mail boxes thanks) and the Job Title field.

Please ensure all tabs have the required information entered as requested noting that Passport Details are essential for International Travel and travel to New Zealand.

In *Set Password* please enter a password of your choice noting that it is not required to be remembered as it will not be required again.
3. YOUR DASHBOARD

Once you have updated your profile, a dashboard similar to below will appear and you can start to seek authorisation to travel using the blue buttons on the right of this page.

If you are a travel Booker your dashboard will look like the example below where you can select your travellers from the Please Select field and see their arranged trips.

If you are a travel Authoriser your dashboard will look like the example below.

4. HOW DO I SUBMIT A TRIP REQUEST?

To submit a Trip Request click on the trip request buttons (workflows) which appear on the left hand side of the Dashboard screen. Select either Domestic or International or External Funding.

All mandatory fields have a * asterisk.
Enter a trip title if you wish or if the local area requires it for auditing / reporting purposes.

If you do not enter a trip title it will populate when the *Reason for Travel* information is selected in the drop down menu that you will locate when you progress through the approval process.

Then sequentially enter the *Travel Details* (e.g. *Flight*, *Hotel* accommodation and / or *Car hire*).

Then select the *Reason for Travel* and the *Cost Centre* from the drop-down menus provided ensuring that the Cost Centre is correct.

Then select the *Authoriser Group* from the drop-down menu provided and the *Authoriser* name from the drop down menus provided.

If you are travelling with any other travellers, you can notify them of your travel details by adding their name into the *Group Bookings* field provided. NOTE: Locomote does not yet have a group booking workflow.
Once you have completed the first page click Continue or click Cancel Trip to withdraw the Trip Request or Save as Draft to save the Trip Request so that it can be edited at a later date.

If continuing, on the next page, complete the Travel Budget noting Total is a mandatory field. To get a sense of travel costs please use the Domestic / NZ Online workflow to get a sense of costs noting that you will be unable to accidentally make a booking.

Then complete the required Funding field(s) below noting that these entries will flow onto the invoices generated by Andrew Jones Travel. If there is a split in funds please add this information in an additional line. OP stands for Operating and RT Research. Ensure Project Number accuracy.

Complete Travel Days fields and the Percentage of personal travel days will populate.

Then complete the Business Case for Travel. Noting: that if a traveller is coming to UTAS on University Business and bringing their partner / family please put their details in the Business Case. This alerts Andrew Jones Travel there are other travellers to be included in this booking.
If you have documents that support your case for trip approval please attach as below.

NOTE: the collective size of these documents is currently 5 KB and the preferred file type to be uploaded is PDF – with emails requiring conversion. If you cannot convert an email to a PDF document, ‘Cut and Paste’ the body of the email into a Word document then use the Snipping Tool. The Snipping tool is found in the ‘All Programs’ area of the Microsoft ‘start’ button.

Then use the Snipping tool to capture the name of the Sender, The Recipient and the Subject and past into the top of the Word document containing the body of the email. Save the Word document as a PDF using the Subject name of the email as the File Name to the Folder of preference. Then attach the ‘email’ PDF as a Supporting Document.

Prior to clicking the submit button please check both of the Declaration buttons.

Once all the required information has been provided, a confirmation message will appear to confirm that your trip has been successfully submitted and an email will be sent to the nominated/pre-assigned approver.

Your Trip Request will appear under the Upcoming Travel heading on your Dashboard as below.
Please see the next section for the additional information required for an International trip.

5. INFORMATION REQUIRED FOR INTERNATIONAL TRIP REQUESTS

The additional fields requiring completion are Country of Risk. If travelling to a Country where the risk rating is DFAT Level 3 or 4, Risk Approval will be required.

Fields of International SOS, Visas and Vaccinations require completion prior to trip submission.

NOTE: SOS International is authenticated when tickets are issued.

NOTE: the passport field below will auto populate when valid so please ensure this information is accurate in the Documents tab in the profile.
The 4 steps in this process are: 1 Submit the trip for an Itinerary by Andrew Jones Travel, 2 Select preferred Quote / Itinerary when received from Andrew Jones Travel, 3 Forward Trip for Approval, 4 Once approved please contact Andrew Jones Travel immediately to book this trip.

6. EXTERNAL FUNDING TRIP REQUESTS

NOTE: If funding for a trip is jointly funded by the University and an External Organisation and the Externally Organisation is contributing more than 75% of the trip – the Externally Funded Approval workflow is used.

In addition Students Travelling on University Business using OS-HELP loans must use the Externally Funded workflow.

This Externally Funded Approval workflow is used for Domestic / International Travel approval with users required to complete the External Funding Approval prompts as below and taking care in accurately advising the name of the External Organisation.

![External Funding Approval Workflow](image)

Additional and clarifying commentary can be entered into the Business Case free text field as below.

![Business Case for Travel](image)

7. CHANGING AUTHORISERS

To change your trip authoriser you can forward a request to another authoriser in your area.

In your dashboard click on the trip request that requires a change of authoriser.
Scroll to the bottom of the Trip Details page until you see the Forward Approval button.

Select the Authoriser who you need to forward the approval of the trip request and add an explanation to the receiver of this request. When completed, click Submit.

When submitted the following message will appear.

8. EDITING A TRIP

NOTE: if a trip is edited it will by necessity require re-approval. This means that the trip will be progressed to an approver once the editing has taken place if the trip is Domestic and if the trip is International another Itinerary / Quote will be reissued.

To edit a trip request, click on the trip to be changed.
Scroll to the bottom of the *Trip Details* page and click *Edit Trip*.

A *Warning* notification will appear to advise that any changes will result in a reissue of your trip request and will require re-approval (if already approved). Click *Continue Editing* to edit.

Complete your edits and click *Submit*.

A message will appear to advise that your request has been successfully submitted and your dashboard will be automatically updated with your new request with the trip *Status Label* reflecting the update.

**9. CANCEL A TRIP**

To cancel a trip request, click on the trip to be cancelled.

Scroll to the bottom of the *Trip Details* page and click *Cancel Trip*.
A pop-up box will appear. State reason for cancellation in Message field box, then click Submit.

10. WHAT DO THE STATUS LABELS MEAN?

On the dashboard all trips have a label state indicating their status. Below is a summary of the label state meanings:

**SAVED** – a Domestic / International or Externally Funded trip has been saved before being submitted for approval

**CHANGE SAVED** - a Domestic / International or Externally Funded trip has been saved after modification

**PENDING APPROVAL** – a Domestic trip request has been submitted and awaiting pre-trip Authorisation

**PRE TRIP APPROVED** – a Domestic trip has been approved and is awaiting booking

**REQUEST DECLINED** - a Domestic / International has been declined

**RISK APPROVAL REQUIRED** – an International Trip request requires a Risk Approval due to the risk rating DFAT 3 or 4

**REQUEST FORBIDDEN** – an International trip request has been declined by the Risk Authoriser as a result of DFAT 3 or 4

**PENDING ITINERARY** – an International pre-trip Approval is pending itinerary/quotes by a Travel Consultant prior to Approval

**QUOTE ISSUED** – an International Trip itinerary / quote has been issued and awaiting approval by an Authoriser

**ITINERARY REVIEW** - an International Trip itinerary has been issued and is awaiting review by the Traveller / Booker

**PENDING BOOKING** - an International Trip itinerary quote approved and pending booking/ticket issuing by a Travel Consultant

**BOOKING COMPLETE** - tickets issued

**TRIP CANCELLED** - a Domestic / International trip has been cancelled by Traveller, Travel Arranger or Travel Consultant

**BOOKING INCOMPLETE** - requires itinerary from Travel Consultant

To view the history / audit trail of the trip request - i.e. when the trip was submitted, approved, cancelled, ticketed, etc. - go to the Messages section of the trip request.
11. INTERNATIONAL TRAVEL - HOW DO I SELECT A PREFERRED QUOTE / ITINERARY?

To view an itinerary quote, click on the Status Label, ‘Itinerary Review’ on your dashboard.

The Quotes page will open; scroll down the page until you reach the Itinerary Quotes section. To review the itineraries, click View next to each quote:

To mark an itinerary as the preferred option, click Select Preferred.

If you would like to discuss the quotes with a Travel Consultant, click Discuss.

Once you select a preferred quote, the Authoriser will receive an email advising of these quotes. When the Authoriser checks the email the quote that was selected will appear as follows.
12. HOW DO I SELECT / REMOVE A TRAVEL ARRANGER?

To add a Travel Arranger to your account click the My Profile link in the Account menu which can be found at the top right hand corner of the screen.

Click on the Assignments tab.

Type in the name of the Travel Arranger in the field of the same name and the Arranger name will appear in a menu.

Add them as a travel arranger by clicking on the button.

To delete a Travel Arranger click on the next to their name to remove them.

13. ARRANGER - HOW DO I CREATE / EDIT TRAVELLER PROFILES?

To create and/or edit profiles click View Profiles from within the Account menu, located on the Dashboard.
If you wish to add a new profile click \textit{Add New Profile}:

If unsure how to proceed please see section 2 in this document and complete all of the mandatory fields under each tab and click \textit{Update Profile} button located at the bottom of the \textit{Personal} tab page to save any changes to the profile.

\section*{14. ARRANGER - HOW DO I ORGANISE TRAVEL FOR TRAVELLERS?}

All workflows will remain in-active (blank), until you select a Traveller.

Select a traveller from the drop down field which is on top of your workflows in your dashboard.

Then follow the steps of 4, 5, 6, 7, 8 and 10 in this document.

If you do not have Travellers or the Travellers you require to book trips for please contact the Travel Team via \texttt{travel.admin@utas.edu.au} for assistance.
15. AUTHORISER - HOW DO I APPROVE / DECLINE A TRIP REQUEST?

To approve or decline a Trip Request either respond to the email via your computer, smartphone or tablet as per the screen shot below select the ‘click here to review’ button which will take you through your dashboard.

A new trip request has been submitted by [insert name] awaiting your approval.

**Trip Summary**
- **Departing:** 23 Mar 2015
- **Destination:** Perth Intl (PER)

**Reason for Travel:** Conference / Workshop

**Description:**

[Click here to review]

Or click on the relevant trip shown on your **Dashboard**.

As an Authoriser you can review the details of the Trip Request and either: Approve the Trip by clicking **Approve**; Decline Travel; or send a message back to the Traveler/Travel arranger about this trip by clicking **Discuss**. NOTE: the initiator of the travel request is the only person who will receive this message.

**Declaration**

I agree to the following declarations...


[Decline Travel] [Cancel Trip] [Forward Approval] [Discuss] [Approve] [Edit Trip]
16. AUTHORISER - HOW DO I APPROVE / DECLINE A QUOTE / ITINERARY TRIP REQUEST OR REASSIGN TO ANOTHER APPROVER?

To approve or decline a quote/itinerary click Trip Request with the status ‘Itinerary Issued’.

Once you have reviewed the details as an Authoriser you have three options. If you wish to approve a particular quote / itinerary, click Approve. If you wish to decline various quote / itinerary requests, click Decline All. If you wish to discuss these options further, click Discuss. Please see the screen shot below.

If you decline a quote/itinerary, you will need to submit a reason as to why it has been declined. Once you have added a reason, click Submit to finalise the process.

If you as an Approver either do not have the authority to Authorise a trip and need to reassign to another Authoriser will need to select the Forward Approval Button.
In the Forward Approval screen that pops up select the correct Authoriser Group and then the Authoriser and enter the relevant comments in the free text field and then Submit.

17. AUTHORISER - HOW DO I DELEGATE MY DUTIES TO ANOTHER AUTHORISER?

To ensure that delegations of Authority in Locomote are seamless with staff activity i.e. planned or unplanned leave please either phone the Travel Team on

| Jo Murray (Project Manager) | +61 3 6324 3342 |

or email the Travel Team via travel.admin@utas.edu.au noting that a formal email will be required to progress this action.

The information required to provide to enable effective Locomote management must have:

- the name and role of the substantive authoriser and the name and role of the staff member backfilling
- ensure the staff member backfilling the leave is 100% in the backfill role i.e. Acting Dean
- provide the beginning and end dates of leave and backfill

18. CLASS OF TRAVEL AUTHORISATION

If you (as a traveller) or an Arranger / Booker selects a class of fare other than Economy

the Authoriser will send the trip will be sent through to the Chief Financial Officer for Authorisation for the higher level Class of Travel.

NOTE: Those staff who have either a medical condition or a clause within their contract of employment which enables them to fly in a class other than economy will be required to provide evidence when requested.
19. RISK AUTHORISATION

If the Whole Country of Risk has a DFAT Level 3 (Reconsider your need to travel) or 4 (Do not travel) the trips in question will be automatically work flowed through to the appropriate Risk Authoriser prior to the trip itself being Approved.

20. USING DOMESTIC / NZ BOOK ONLINE (SERKO)

Once your Domestic trip has been approved the Status Label will be.

To proceed with a booking click on the Domestic / NZ Book Online button as below.

When the following screen appears – click on the Accept button.

In the following screen click on Quick Booking.
Confirm you select an *Available Policy* from the drop down menu prior to clicking on *Next*. Unless travelling to a regional town i.e. Lismore select *Australian Main Cities*.

Enter required flights and departure times and click on *Search Air Availability*.

The following screen will appear.

In the next screen select the most logical flight which will become highlighted in *GREEN* and once selections have been made click on *Next*.
If you are satisfied with the flight selection made click on Next.

In the next screen select the Additional Data link.

You will find the Authorisation Code in the emails sent by Locomote of the approved trip.

Noting that the Trip ID is generated irrespective of the trip status as below.

Enter the Authorisation Code, the Trip ID and the OP / RT codes in the fields as below. Remember the OP / RT codes are in the trip details.
Making a payment for Trips is covered in the next section.

21. TRIPO PAYMENT(S)

   Flights:

   When booking / paying for trips purchase orders are NOT required. All travel is paid for by University credit card. Local area cost centres have differing administrative structures regarding the use of cards for travel noting that the reports from Locomote are matched to the cards used in the area.

   • Credit card can be held on traveller
   • Credit card can be entered each time

   If you are making a travel booking via the agent Andrew Jones Travel they can hold a UTAS local card that is linked to a specific area for all travel payment.

   • A credit card can be held on file or can be given at time of booking

   Using a single card facilitates ease of reconciliation against travel expenses for each cost centre. For consistency of card use please familiarise yourself with the Use of Credit Card Procedure. Card details are entered into the SERKO fields below – when all details are entered select Next to enable payment.
Accommodation

- When booking accommodation through Serko a credit card is needed at check-in/out
- Travellers / bookers are free to contact the hotel directly and provide card details over the phone for payment
- Travellers can make a booking using Expedia or Wotif via Andrew Jones Travel which will require credit card details for payment at time of booking

Car Hire

- Bookings are made online with payment made using a credit card when picking up the car
- Details of who travelled available via report from AJT if there are reconciliation issues
- People should not be using this account without bookings being made via AJT
  - Unless in Tasmania (this should be fleet).

22. LOGGING OUT OF LOCOMOTE

To log out of Locomote you MUST close the Browser and Clear browsing data

To do this select the drop down tab of the Browser and the select History.

In History select Clear browsing data

Ensure the Browsing history, Download history, Cookies and other site and plugin data and the Cached images and files are checked then select Clear browsing data to complete log out.
23. PRIVATE TRAVEL

Private Domestic travel for recreational purposes can be booked through Andrew Jones Travel. Locomote approval is not required and bookings can be made using the Domestic / NZ Book Online button. In these cases please ring Andrew Jones Travel for a Trip ID and an Authorisation code in order to complete the booking noting that you will need to use your personal Credit Card to complete this booking.

Private International Travel - please contact Andrew Jones Travel directly to make arrangements.