



Quick Reference Guide

FCM Pre-Trip Approve - Premium

[Premium version]

The Pre-Trip Approve Dashboard

| | | | | | | | |
|--|---|-------------|--------------------------------|--|--------------|--------------------|--------------|
|   | Approvals dashboard | | | | | CREATE NEW REQUEST | EXPORT ↗ |
| | My drafts / 21 My pending requests / 6 My actionable requests / 2 My approvals / 0 | | | | | | |
| | Lead traveller | Trip route | Trip dates ↓ | | Approval | Travellers | Travel types |
| | Matt Gunders Trip ID: UON8V9RSM | SYD/PER/SYD | 28 Sep 22 - 1 Oct 22 4 days | | Level 0 of 1 | 1 | 🔗 📄 |
| | Matt Gunders Trip ID: UONP9TG98 | BNE/SYD/BNE | 2 Aug 22 - 3 Aug 22 1 day | | Level 0 of 2 | 1 | 🔗 |
| | Matt Gunders Trip ID: UONI14UWQ | BNE/SYD/BNE | 26 Jul 22 - 27 Jul 22 1 day | | Level 2 of 3 | 1 | 🔗 |

The dashboard houses all trips and files them into one of the four tabs seen below. Most users will see three tabs, with the My Approvals tab reserved for those with authority to approve travel.

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The screenshot shows the 'Approvals dashboard' with the following elements:

- 1**: 'CREATE NEW REQUEST' button
- 2**: 'My drafts / 21' tab
- 3**: 'My pending requests / 6' tab (highlighted)
- 4**: 'My actionable requests / 2' tab
- 5**: 'My approvals / 0' tab
- 6**: 'Trip dates' column header with a sort arrow
- 7**: 'Approval' column header
- 8**: Trip ID line (e.g., UON8V9RSM)

| Lead traveller | Trip route | Trip dates | Approval | Travellers | Travel types |
|------------------------------------|-------------|--------------------------------|--------------|------------|--------------|
| Matt Gunders Trip ID: UON8V9RSM | SYD/PER/SYD | 28 Sep 22 - 1 Oct 22 4 days | Level 0 of 1 | 1 | |
| Matt Gunders Trip ID: UONP9TG98 | BNE/SYD/BNE | 2 Aug 22 - 3 Aug 22 1 day | Level 0 of 2 | 1 | |
| Matt Gunders Trip ID: UONI14UWQ | BNE/SYD/BNE | 26 Jul 22 - 27 Jul 22 1 day | Level 2 of 3 | 1 | |

1. Click here to begin a new travel request.
2. At any time during the process, requests may be saved as a draft and resumed later from this tab.
3. This is where you'll find all requests awaiting approval.
4. This tab houses all travel requests that require action. For example, trips that are approved, but not yet booked.
5. This tab stores bookings awaiting approval and is only visible to those with approver access.
6. Click the trip dates arrow to sort trips in ascending or descending date order.
7. Check this column for an update on the approval status of the trip.
8. Click anywhere on the Trip ID line to view the travel request.

Create a new trip request

On your dashboard, click **CREATE NEW REQUEST**, complete the basic travel needs queries and click **START**.

The form titled 'What are your travel needs?' has radio buttons for Domestic, International (selected), and Trans-Tasman. Below, there are six boxes for selecting travel types: FLIGHTS, HOTEL STAY, CAR RENTAL, AIRPORT TRANSFER, RAIL, and OTHER. A 'START' button is at the bottom right.

FCM Pre-Trip Approve will guide you through the **four simple steps** of the travel request process. Whether your trip is a simple or complex itinerary, the key to getting your travel approved is ensuring you complete all the required information.

1 Travel Requirements — 2 Administration details — 3 Compliance — 4 Review Trip

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1. Travel Requirements

1 Travel Requirements — 2 Administration details — 3 Compliance — 4 Review Trip

FLIGHTS

☒ Return ☐ One-Way ☐ Multi-City

From Sydney Kingsford ... SYD To Los Angeles Intl. ... LAX

Departing 05/08/2022 Return 08/08/2022

Additional Remarks Remove

HOTEL STAY

1 Room(s), Room Type

Destination Los Angeles LAX

Check-In 05/08/2022 Check-Out 08/08/2022

Add Hotel

Additional Remarks Remove

OTHER

Travel Type Select Type

Travel requirements

500/500

Add Other

CANCEL SAVE NEXT

Select type allows you to request the cabin class for air travel.

Please note, the online booking tool is designed to make travel arrangements that comply with your Company Travel Policy & Procedure.

The same logic applies for hotel room types and car types.

These remarks are viewable by your approver only.

If you have special requests to be actioned by FCM, please add them into the Travel Agency notes found on the Confirm screen in Savi (the online booking tool).

If your hotel needs are regional, add the correct location using the search

Include non-bookable items, in your request to give a complete picture of your trips costs.

The cancel button will delete the request.

Save your progress to be resumed later. The request will be added to your drafts tab.

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2. Administration Details

1 Travel Requirements — 2 Administration details — 3 Compliance — 4 Review Trip

✓ **Low risk destination**
Additional documentation and approvers may be required [View Details](#)

WHO IS TRAVELLING
Who is going on the trip?

Selected Travellers: 1 [Remove All](#) [+ Add Traveller](#)

Matt Unda [matthew.gunders+unda@flightcentre.com.au](#) **LEAD**

TRIP ARRANGER
Who is managing and booking this trip

Kristy Unda
[kristy.galloway+unda@fcmtravel.com.au](#)

ESTIMATED TRIP COST
Indicate the estimated cost for each segment of your trip

| | | | | |
|-------|--------------|-------|--------------|-----------------------------|
| Air | Segment cost | Hotel | Segment cost | Total Cost \$0.00 |
| Other | Segment cost | | | |

Currency: AUD

DATA CAPTURE AND REPORTING

Employee Type Cost Centre Budget Code

Project Code

ATTACHMENT
Please attach completed RAMP form required for International trips here.

Requirements

- Risk Assessment template HSWRA06 located on National Drive: Administration>Safety@ND> Risk Management Templates (RAMPS)
- Attach up to 7 files
- No medical, passport or driver's licence info

Drag & Drop, or Max file size 10mb [BROWSE FILES](#)

CHECKLIST / DECLARATIONS
Please provide confirmation for each check list item

☐ I confirm that I have read and will adhere to...

☐ I confirm that the name on this trip request is as per the travellers passport/photo identification

☐ I confirm if my trip request is for an international destination, the RAMP form for this trip request has been completed and attached

CANCEL SAVE PREV NEXT

The Risk Rating is driven by the Destination added to the Travel Requirements page. The Risk Rating is a DFAT Risk Rating from Smartraveller.gov.au

ISOS Risk Ratings are also included in this drop down.

Provide an estimate the cost of your trip

The Data Capture fields are required at this point in the workflow.

Select the relevant declarations by ticking the boxes.

The Add Traveller feature should only be used for adding a guest traveller to a trip that already includes a staff member.

For trips with more than one traveller, the first traveller added will be assigned as the lead traveller.

Ensure the Lead Traveller is the most senior staff member. Or for trips including guests, ensure the staff member is nominated as the lead traveller.

Ensure all relevant supporting documentation, such as international quotes are uploaded here.

This field houses a maximum of 7 documents.

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3. Compliance

The FBT Split auto calculates based on the responses to the Allocation in the Travel Diary.

Complete the Location, Allocation and Description Summary with information on your trip.

1 Travel Requirements — 2 Administration details — 3 Compliance — 4 Review Trip

Trip for **Matt Unda** LEAD

Duration: 4 Days Start: 05/08/2022 End: 08/08/2022

Purpose of travel

For all trips (regardless of duration) please provide the mandatory travel type for each day of your trip in the following form. This will be used to calculate personal contributions and Fringe Benefits Tax Liability.

[View Instructions](#)

FBT Split

100% Business 0% Personal

Travel Diary ASSIGN TO LEAD

| | | | |
|----------------------------|-------------------------|--------------------------|---|
| Day 1 Fr. 05 Aug | Location Los Angeles | Allocation Business > | Description Summary Flight to Los Angeles |
| Day 2 Sa. 06 Aug | Location Los Angeles | Allocation Business > | Description Summary Conference at XYZ Centre |
| Day 3 Su. 07 Aug | Location Los Angeles | Allocation Business > | Description Summary Conference at XYZ Centre |
| Day 4 Mo. 08 Aug | Location Los Angeles | Allocation Business > | Description Summary Flight home |

CANCEL SAVE PREV REVIEW

You can send the completed Travel Diary to the Lead Traveller by clicking this button.

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4. Review

Check your details carefully before sending the trip for approval.

Once approved, trip details cannot be amended.

1 Travel Requirements

2 Administration details

3 Compliance

4 Review Trip

Review

Review the provided information below before submitting your request.

Trip for **Matt Unda** LEAD

Duration
4 Days

Start
05/08/2022

End
08/08/2022

Trip request id

UNDEGHR1P

Travel dates

05 Aug 2022 - 08 Aug 2022

Trip arranger

Kristy Unda kristy.galloway+unda@fcmtravel.com.au

Traveller

Main Travellers 1
Matt Unda

Estimated trip cost

| | | |
|-------|-------------|--------------------------------------|
| Air | \$ 2,500.00 | Total Cost \$ 7,500.00 AUD |
| Hotel | \$ 5,000.00 | |
| Other | \$ 0.00 | |

Data capture & reporting

| | |
|---------------|----------|
| Employee Type | EXC |
| Cost Centre | UNDAA11N |
| Budget Code | 1650 |
| Project Code | 12544 |

Attachments

No attachments provided

Checklist / declarations

- ✓ I confirm that I have read and will adhere to Notre Dame University's Travel Policy located here
- ✓ I confirm that the name on this trip request is as per the travellers passport/photo identification
- ✓ I confirm if my trip request is for an international destination, the RAMP form for this trip request has been completed and attached

Reason for travel

No reason provided

✓ **Low risk destination**

Additional documentation and approvers may be required

View Details

FLIGHTS

| Departure | Arrival | Departure Date | Return Date | Class |
|------------------------------------|-------------------------------|----------------|-------------|-------|
| Sydney Kingsford Smith Airport SYD | Los Angeles Intl. Airport LAX | 05/08/2022 | 08/08/2022 | |

HOTEL STAY

| Location | Check-In | Check-Out | Rooms |
|-----------------|------------|------------|--------|
| Los Angeles LAX | 05/08/2022 | 08/08/2022 | 1 Room |

OTHER

| Travel Type | Travel Requirements |
|-----------------|---------------------------------|
| Daily Allowance | Daily Allowance Of \$50 Per Day |

Compliance Details

hide

Fringe Benefits Tax Split

Business vs personal travel

100%

 Business

0%

 Personal

| Date | Location | Travel type | Description summary |
|---------------------|-------------|-------------|--------------------------|
| Day 1 Fr. 05 Aug | Los Angeles | Business | Flight to Los Angeles |
| Day 2 Sa. 06 Aug | Los Angeles | Business | Conference at XYZ Centre |
| Day 3 Su. 07 Aug | Los Angeles | Business | Conference at XYZ Centre |
| Day 4 Mo. 08 Aug | Los Angeles | Business | Flight home |

CANCEL

SAVE

PRINT

PREV

SEND REQUEST

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How to book

SEND TO FCM or BOOK ONLINE? The method used to action your booking will be determined by the trip type. Online bookings will be directed to FCM's online booking tool, Savi. The details of your trip request, including your budget will be carried through to Savi. Savi does most of the work for you. All you need to do is select your travel choices and confirm your booking.

| TRIP TYPE | ONLINE | OFFLINE | NOTES |
|--------------------------------|--------|---------|---|
| Simple | ✓ | | <div><div>PRINTSEND TO FCMBOOK ONLINE</div><p>Requests for rail, insurance, cruise, or Airbnb bookings should be added as remarks in the Notes for Travel Agency field. This field is found at the Confirm stage of the online booking process.</p><div>Review and confirm details</div><div><div>Traveller detailsVIEW DETAILS</div><div>Additional informationVIEW DETAILS</div><div>Booking details</div><div>Notes for travel agency</div><div>Please book car ferry from Cleveland to Dunwich 11.30am 15 June and returning from Dunwich on 17 June at 12.30pm.</div></div></div> |
| Complex | | ✓ | <div><div>PRINTSEND TO FCMBOOK ONLINE</div><p>Book rail, insurance, ferries, cruise, or Airbnb by emailing our FCM team.</p></div> |
| Groups (10 or more travellers) | | ✓ | <p>Talk to your FCM team on the best way to book groups.</p> |

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How to change your approver

The approver(s) may be changed during the Review step of the request process, or on trips with a pending status. *Note, this step may not be available in your version of pre-Trip Approve.*

| My drafts / 15 My pending requests / 3 My actionable requests / 13 | | | | | |
|---|-------------|---------------------------------|--------------|------------|--------------|
| Lead traveller | Trip route | Trip dates ↓ | Approval | Travellers | Travel types |
| Donna Howton Trip ID: UON600Q60 | MEL/BNE/MEL | 8 May 22 - 9 May 22 1 day | Level 0 of 2 | 1 | ➡ |
| Donna Howton Trip ID: UON1H0K2K | SYD/LHR/SYD | 18 Apr 22 - 24 Apr 22 7 days | Level 0 of 3 | 1 | ➡ ⚙ |
| Donna Howton Trip ID: UON7C9E6D | SYD/CFS/SYD | 9 Feb 22 - 9 Feb 22 1 day | Level 0 of 2 | 1 | ➡ |

CANCEL

PRINT

WITHDRAW

2

CHANGE APPROVER

RESEND REQUEST

Level 1



Linemanager Test
linemanager

Select reason for change
Please Select

Level 2



Delegateone Test
delegate1

Select reason for change
Normal Approver is Out of Office

CONFIRM

DISCARD

1. Retrieve the trip from your My PENDING REQUESTS.
2. Scroll to the bottom of the trip and click CHANGE APPROVER.
3. Select the new approver from the drop-down list and ensure a reason for change is nominated.

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Cancellations and Changes

The process to follow for cancellations and changes will depend on the status of your trip:

| TRIP STATUS | HOW TO CANCEL | HOW TO CHANGE |
|-------------------------|--|---|
| Pending Approval | Withdraw the request using the steps outlined below. | Follow the steps to withdraw the request, then start a new trip request. |
| Approved but not booked | Approved trips cannot be cancelled in FCM Pre-Trip Approve. Leave the trip unactioned in your Actionable Requests tab. | Any changes to an approved trip require a new approval and therefore, a new trip request. |
| Booked | Contact the FCM team for assistance | Contact the FCM team for assistance |

How to withdraw a pending request:

| My drafts / 15 My pending requests / 2 My actionable requests / 13 | | | | | |
|--|-------------|---------------------------------|--------------|------------|--------------|
| Lead traveller | Trip route | Trip dates | Approval | Travellers | Travel types |
| Donna Howton Trip ID: UON690Q6D | MEL/BNE/MEL | 8 May 22 - 9 May 22 1 day | Level 0 of 2 | 1 | 1 |
| Donna Howton Trip ID: UON1H0K2K | SYD/LHR/SYD | 18 Apr 22 - 24 Apr 22 7 days | Level 0 of 3 | 1 | 1 |
| Donna Howton Trip ID: UON7C9E6D | SYD/CFS/SYD | 9 Feb 22 - 9 Feb 22 1 day | Level 0 of 2 | 1 | 1 |

1. Select the trip from the My pending requests tab.
2. Scroll to the bottom of the screen and click WITHDRAW.
3. The trip is removed from My pending requests. No record of this trip is retained.

| | | | | |
|--------|-------|----------|-----------------|----------------|
| CANCEL | PRINT | WITHDRAW | CHANGE APPROVER | RESEND REQUEST |
|--------|-------|----------|-----------------|----------------|

| My drafts / 15 My pending requests / 2 My actionable requests / 13 | | | | | |
|--|-------------|---------------------------------|--------------|------------|--------------|
| Lead traveller | Trip route | Trip dates | Approval | Travellers | Travel types |
| Donna Howton Trip ID: UON1H0K2K | SYD/LHR/SYD | 18 Apr 22 - 24 Apr 22 7 days | Level 0 of 3 | 1 | 1 |
| Donna Howton Trip ID: UON7C9E6D | SYD/CFS/SYD | 9 Feb 22 - 9 Feb 22 1 day | Level 0 of 2 | 1 | 1 |


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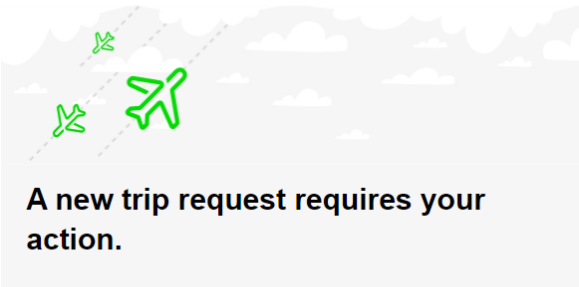
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Approving a trip

All Approvers, when a new travel request is submitted, will receive an email notification containing the information needed to make an informed decision about the request. You can then action your decision in two clicks directly from the email, by selecting APPROVE, REJECT or REQUEST CHANGE.



Trip approval request for:
Demo Traveller LEAD



A new trip request requires your action.

Hi Travel Approver,


A new trip request has been assigned to you. Please review the details below to approve, reject or request a change to the trip.

APPROVE TRIP

REJECT TRIP

REQUEST CHANGE

[Log in to action this trip](#)




Please action this trip based on the trip details provided

Please review all trip request details, including attachments, before actioning this trip. A reason is mandatory if rejecting a trip.


Add your reason here

All rejections must include a reason.

 Actioning this trip cannot be undone

REJECT

APPROVE



Trip ID: UONVO34XE
Demo Traveller LEAD




Routing

NTL/MEL/NTL

Dates

14 Jun 22 - 17 Jun 22

Travel types

What changes would you like to request for this trip?

Change requirements

Ensure you outline the details of your change request here.

CANCEL

REQUEST CHANGE