


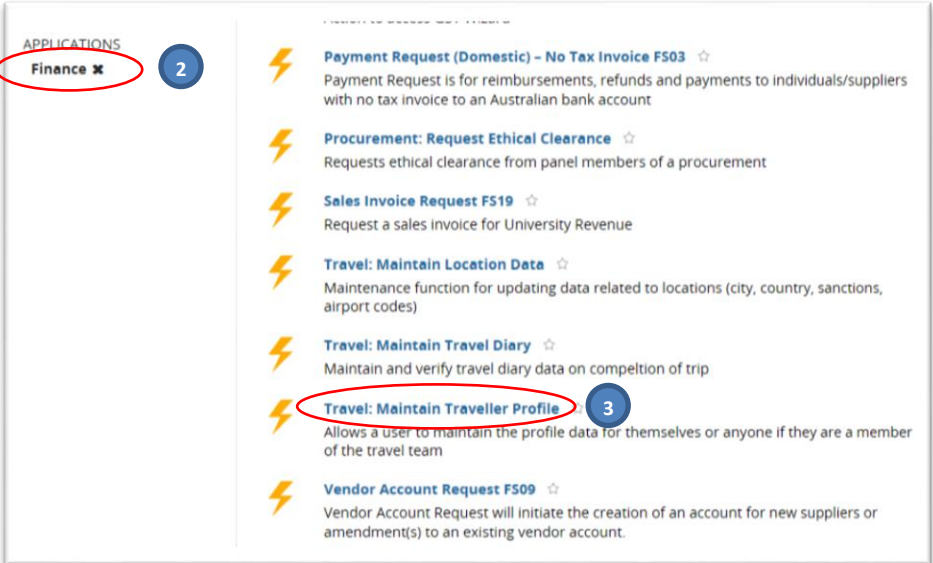
# Quick Reference Guide – Maintain Traveller Profile Form

**Purpose:** This guide provides an overview on how to maintain a Travel Profile for the purpose of booking travel with the University’s Travel Team or via Serko (On-line Booking Tool).

**References:** Refer to the [Travel Guidelines](#) on the Finance Website.

**Index:**

1. Launch the Form in Appian
2. Completing a Traveller Profile
3. Saving an Incomplete Traveller Profile

<b>1. Launch the Form in Appian</b>	
<b>Launching the Form</b>	<p>To access the Travel Profile Form, click on the following link from the Appian environment – <a href="https://bpi.unisa.edu.au/">https://bpi.unisa.edu.au/</a></p> <p>Use your UniSA username and password to login</p>
1. Click in Actions	
2. Click on the Finance folder in the left-hand menu  3. Click on the link for Travel: Maintain Traveller Profile	

## 2. Completing a Traveller Profile

Travellers and Travel Coordinators are required to enter information in all mandatory fields (fields with a \*) to ensure your Travel Profile is completed prior to booking travel.

### Personal Information – new profile/existing profile

1. The fields in the Personal Information section will be pre-populated from your staff/student record in the HR or Student system.

*Please note: If you already have a travel profile with the University's Travel Management Company(TMC), the available information will be pre-populated throughout the form.*

2. If the information displayed in the non-editable fields is not correct, click on the link to update your staff record in MyHR.

*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 within the picker, 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.*

### Maintain Traveller Profile

#### Personal Information

**Personal Information**

\* Title

First Name

Middle Name(s)

\* Family Name

Known As

\* Gender

Employee Id

Position

Org 1

Org 2

Email Address

Date of Birth

Home Address

OBT enabled

[\\*click here to access MyHR to update information if required. Updated data may take up to 2 days to be reflected with your profile.](#)

**Contact Details**

\* Phone Number

Country Code

Area Code (Leave blank for mobiles)

Number

\* Emergency Contact Name

\* Relationship to Traveller

\* Emergency Contact Phone Number

Country Code

Area Code (Leave blank for mobiles)

Number

#### Personal Information

**Personal Information**

\* Title

First Name

Middle Name(s)

\* Family Name

Known As

\* Gender

Employee Id

Position

Org 1

Org 2

Email Address

Date of Birth

Home Address

OBT enabled

[\\*click here to access MyHR to update information if required. Updated data may take up to 2 days to be reflected with your profile.](#)

**Contact Details**

\* Phone Number

Country Code

Area Code (Leave blank for mobiles)

Number

\* Emergency Contact Name

\* Relationship to Traveller

\* Emergency Contact Phone Number

Country Code

Area Code (Leave blank for mobiles)

Number

2nd Emergency Contact Name

Relationship to Traveller

\* 2nd Emergency Contact Phone Number

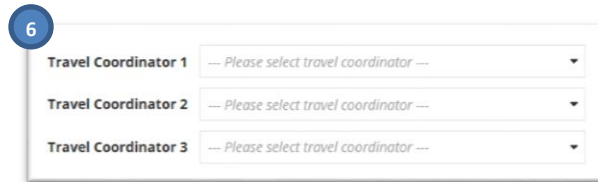
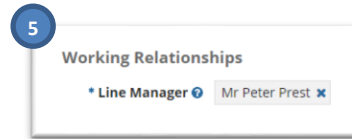
Country Code

Area Code (Leave blank for mobiles)

Number

## Working Relationships

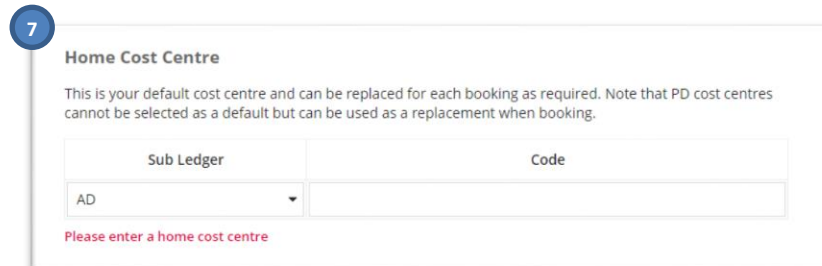
- Line Manager** – If you are eligible to use Serko, the line manager in your profile will be notified of each booking you make. Your immediate line manager will be pre-populated from the HR system. If the name displayed is not correct or needs to be amended due to temporary changes in reporting lines, click the 'x' beside the name to remove it and the field will become editable to search for the correct manager's name.
- Travel Coordinators** – You 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 Executive Dean/Director of Research Institutes & Centres/Unit Director, as listed in the pickers. You should seek agreement from your local area before appointing any Travel Coordinators.



## 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.

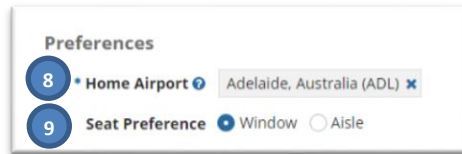
*Please note: PD cost centres cannot be selected as the home cost centre but can be specified at the time of booking.*



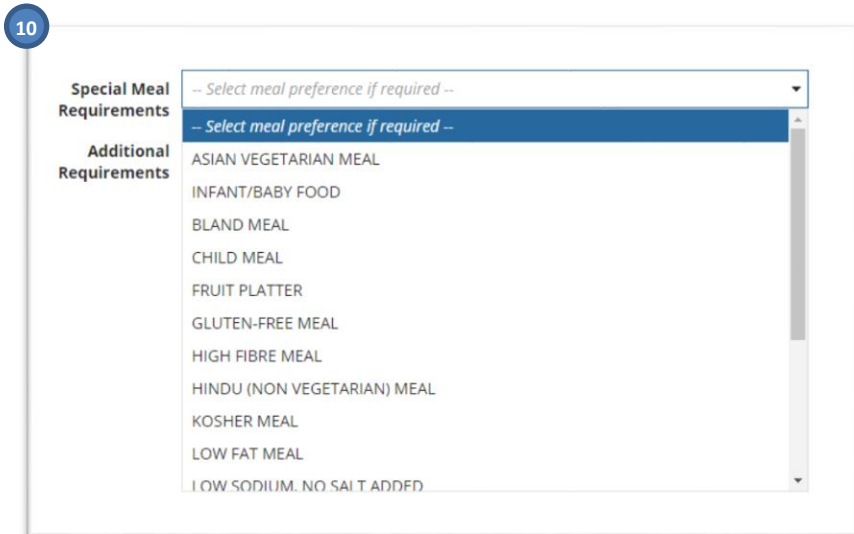
## Preferences

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 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.*



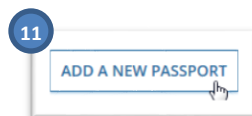
The screenshot shows the 'Preferences' section. Item 8 is 'Home Airport' with a dropdown menu set to 'Adelaide, Australia (ADL)'. Item 9 is 'Seat Preference' with radio buttons for 'Window' (selected) and 'Aisle'.



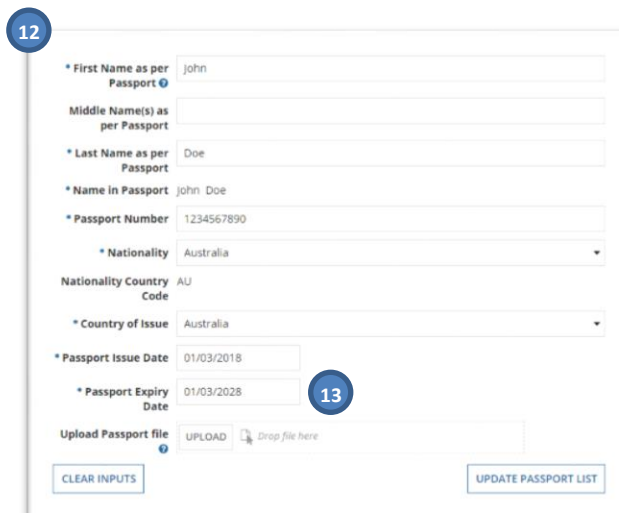
The screenshot shows a dropdown menu for 'Special Meal Requirements'. The menu is open, displaying a list of options: '-- Select meal preference if required --', 'ASIAN VEGETARIAN MEAL', 'INFANT/BABY FOOD', 'BLAND MEAL', 'CHILD MEAL', 'FRUIT PLATTER', 'GLUTEN-FREE MEAL', 'HIGH FIBRE MEAL', 'HINDU (NON VEGETARIAN) MEAL', 'KOSHER MEAL', 'LOW FAT MEAL', and 'LOW SODIUM. NO SAI T ADDED'.

## Passport Details

11. **Add a New Passport** - will allow you to add your passport details to your profile. These details will be stored against your profile to be 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.



The screenshot shows a button labeled 'ADD A NEW PASSPORT' with a hand cursor pointing to it.



The screenshot shows a form for adding passport details. It includes fields for: First Name as per Passport (John), Middle Name(s) as per Passport, Last Name as per Passport (Doe), Name in Passport (John Doe), Passport Number (1234567890), Nationality (Australia), Nationality Country Code (AU), Country of Issue (Australia), Passport Issue Date (01/03/2018), and Passport Expiry Date (01/03/2028). There is also an 'Upload Passport file' section with an 'UPLOAD' button and a 'Drop file here' area. At the bottom, there are 'CLEAR INPUTS' and 'UPDATE PASSPORT LIST' buttons.

14. A scanned copy of the passport photo identification page must be uploaded into your travel profile.

*Repeat the above steps for each additional passport.*

15. If you have multiple passports, you can change which passport is your primary (default) passport by clicking on the 'x'.

16. To remove a passport, tick the selection box to the left of the Passport Number. The 'Add A New Passport' button will change to **Remove Selected Passports**.

A screenshot of a form for adding a passport. Fields include: First Name as per Passport (John), Middle Name(s) as per Passport, Last Name as per Passport (Doe), Name in Passport (John Doe), Passport Number (1234567890), Nationality (Australia), Nationality Country Code (AU), Country of Issue (Australia), Passport Issue Date (01/03/2018), and Passport Expiry Date (01/03/2028). There is an 'Upload Passport file' section with 'UPLOAD' and 'Drop file here' options. A blue circle with the number '14' is placed over the 'Drop file here' text. At the bottom are 'CLEAR INPUTS' and 'UPDATE PASSPORT LIST' buttons.

Two screenshots showing passport management options. The first screenshot (labeled '15') shows a 'Primary Passport' section with a green checkmark and a red 'x' icon. The second screenshot (labeled '16') shows a list of passport numbers with checkboxes: 'Passport Number' (unchecked), '21546545' (unchecked), and '48654884654' (checked). Below the list is a red button labeled '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. 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.*

18. A scanned copy of each Visa must be uploaded into the travel profile.

*Repeat the above steps for each additional Visa.*

19. To remove a Visa, tick the selection box to the left of the Visa Type. The 'Add A New Visa' button will change to **Remove Selected Visas**.

A screenshot showing a blue button labeled 'ADD A NEW VISA'. Below the button is an information icon and the text: 'You must enter an associated passport prior to adding a Visa'. A blue circle with the number '17' is placed over the button.

A screenshot of a form for adding a visa. Fields include: Visa Type (radio buttons for Single Entry, Double Entry, Multi-entry, Re-entry, APEC), Country of Issue (please select country), Visa Number, Expiry Date (dd/mm/yyyy), and Associated Passport (Please select a passport from your list). There is an 'Upload Visa file' section with 'UPLOAD' and 'Drop file here' options. A blue circle with the number '18' is placed over the 'Drop file here' text. At the bottom are 'CLEAR INPUTS' and 'UPDATE VISA LIST' buttons.

A screenshot showing a table of visas. The table has two columns: 'Visa Type' and 'Description'. The rows are: 'Single Entry' (unchecked) with description 'China', and 'Single Entry' (checked) with description 'Vietnam'. Below the table is a red button labeled 'REMOVE SELECTED VISAS'. A blue circle with the number '19' is placed over the button.

Visa Type	Description
<input type="checkbox"/> Single Entry	China
<input checked="" type="checkbox"/> Single Entry	Vietnam

## Loyalty Programs

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

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

*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 Type. The 'Add Loyalty Programs' button will change to **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).*

20

### 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			

ADD LOYALTY PROGRAM

21

\* Loyalty Program  Airline  Hotel  Car Hire

\* Name on Card

\* Membership Number

CLEAR INPUTS UPDATE MEMBERSHIPS

22

Loyalty Program Type

Airline

Airline

Hotel

REMOVE SELECTED MEMBERSHIPS

## Action Buttons

23. **Save Profile and Continue** – updates your travel profile within Appian and submits the update directly to the University's Travel Management Companies.

*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.

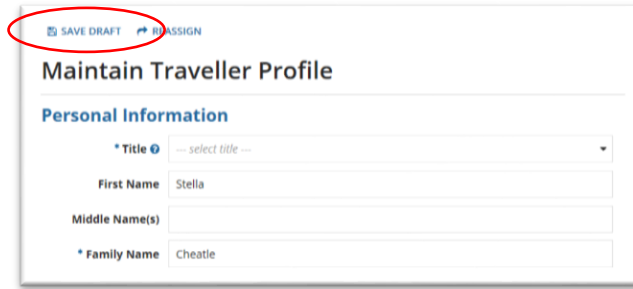
**Delete** – discards the request in Appian.

23

CANCEL DELETE SAVE PROFILE AND CONTINUE

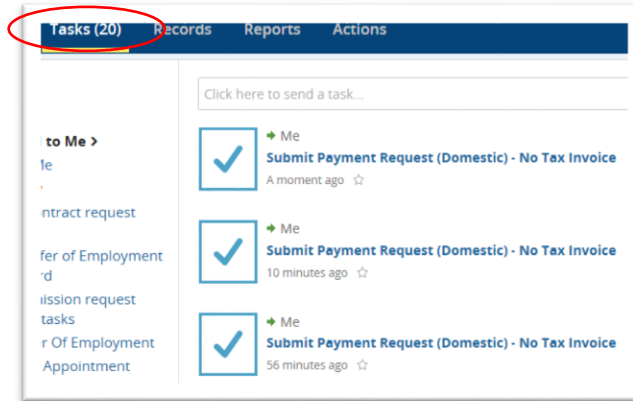
### 3. Saving an Incomplete Traveller Profile

1. The **Save Draft** function on the left-hand side of Appian's standardised menu saves your request during the process.



The screenshot shows a web form titled "Maintain Traveller Profile". At the top left, there are two buttons: "SAVE DRAFT" and "REASSIGN". The "SAVE DRAFT" button is circled in red. Below the buttons is a section titled "Personal Information" with several input fields: a dropdown menu for "Title" (with a placeholder "select title"), a text field for "First Name" containing "Stella", a text field for "Middle Name(s)", and a text field for "Family Name" containing "Cheatie".

2. Saved requests that have not been submitted will be saved in the Tasks folder.



The screenshot shows a task list interface. At the top, there are tabs for "Tasks (20)", "Records", "Reports", and "Actions". The "Tasks (20)" tab is selected and circled in red. Below the tabs is a search bar with the placeholder text "Click here to send a task...". The task list is organized into a "to Me >" section. It contains three tasks, each with a blue checkmark icon in a box, a green arrow icon, and the text "Me" followed by the task title "Submit Payment Request (Domestic) - No Tax Invoice". The first task is marked "A moment ago", the second "10 minutes ago", and the third "56 minutes ago".