

Create Amend or Cancel an International Travel Requisition in Fraedom

Introduction

All international travel must have be approved by an authorised delegate prior to any arrangements or payments being made. This document outlines the steps to raise an international travel requisition in Fraedom to be work flowed for approval.

It is imperative from a financial management perspective and for duty of care that international travel for University business is appropriately pre-approved. To support this within the University, a travel requisition must be completed and approved in the Expense Management System (Fraedom) prior to any international travel arrangements or payments being made.

Procedure:



This procedure explains how to:

1. Create an International Travel Requisition in Fraedom and submit it for approval.
2. Email the Approved Travel Requisition to the University's mandated Travel Management Company (TMC), FCM Travel Solutions to enable bookings to be made/tickets issued.
3. Make amendments/cancel the Travel Requisition if required.

Step 1

Create an International Travel Requisition in Fraedom and submit it for approval.

Navigate to the Finance & Procurement website at <http://www.adelaide.edu.au/finance/>

- Click 
- Login if your browser requires it, using your University employee ID and password.
- On the Fraedom Terms and Conditions page, read and click .



Terms and Conditions

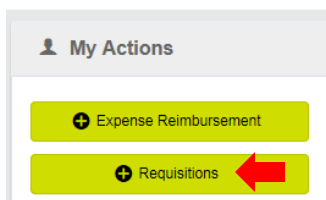
Users will ensure that:

- Acquittals are completed by the end of the month following the month in which the transaction occurred.
- To support business related expenditure, all images of tax invoices/receipts/lost or unobtainable declarations/other documents are scanned and uploaded into Fraedom and retained until the transaction is approved.
- Any travel undertaken and use of the corporate credit card is in accordance with the [Travel and Entertainment Policy and Procedures](#) and the [Corporate Credit Card Procedures](#).
- Claims for reimbursement of expenses are in accordance with the [Reimbursement Procedures](#).
- Expenditure is within project budgets and has been accurately coded.

By clicking the 'Accept' button below I declare that the expenses incurred were for University business or where personal in nature have been acquitted as such.



- From the Fraedom main page click on **+ Requisitions**.



- Requisition: Create New Item window will be displayed.
- In the Description field enter Who-Where-When (e.g. N Natt UK 1-15 Oct 19).
- The Date and Currency Details are set by default, please do not change the information.
- After completion, click Save.

Requisition: Create New Item

Please enter the name of the trip in the "Description" field, e.g. "Conf SYD - Jul 12" and select save. Changes to other fields are not required.

Expense Details

Requisition Accounts: Requisitions (Nita Natt)

Description: N Natt UK 1-15 Oct 19

Date: 31 Jul 2019

Currency Details

Source Currency: Australian Dollar

Billing Currency: Australian Dollar

Save

- Note: If you are an account nominee, the Requisition Accounts dropdown will allow you to select the relevant travellers account.

Requisition: Create New Item

Please enter the name of the trip in the "Description" field, e.g. "Conf SYD - save. Changes to other fields are not required.

Expense Details

Requisition Accounts

Requisitions (Elizabeth Chang)
Requisitions (Nita Natt)

Description

Step 2

- The Requisition: Details pop-up window will be displayed. Click the **+ New International Travel Request**.

Requisition: Details [Print Travel Requisition](#)

Purchase Request: 26 Apr 2017
Amount: \$0.00 AUD
Elizabeth Chang-USA-1-15 May

Expense Types Account Codes Merchant Info Approval

Options

The links below are used to complete details about your proposed travel in order to gain approval prior to booking the travel. Click on the link and complete the form provided.

No Information Entered [+ New International Travel Request](#)

The Expense Types tab will be displayed.

- Read the Travel Insurance Guide; Travel Diary; Private Travel Guidelines; and DFAT travel advice. After reading the policy checklist, check (✓) on the four boxes.
- Enter the required mandatory fields indicated by an asterisk (*).
- If the destination has a DFAT travel advice of Level 3 or Level 4, click on the Approval Form link and complete the 'Request for approval to travel to a high risk destination' form and submit for approval by the Pro Vice-Chancellor International (PVCi). Once the approved form is returned please attach it to the Travel Requisition.
- The Dept ID and Project code will be used for the charging of anything booked with the Travel Management Company (TMC) so ensure it is correct.

Requisition: Details Print Travel Requisition

Purchase Request: 31 Jul 2019
 Amount: \$7,120.00 AUD
 N Natt UK 1-15 Oct 19

Expense Types | Account Codes | Merchant Info | Approval

Options | Itinerary

Policy Checklist

When completing this requisition the traveller is required to:

- Review the University's [Travel Insurance Guide](#)
- agree to submit a [Travel Diary](#) for all international travel
- review the [Private Travel Guidelines](#)
- if the [DFAT](#) travel advice is level 3 or level 4 complete the high risk [Approval Form](#)

International Travel Requisition

Request Status	New Travel	Requested By	Nita Natt
Traveller Name	Nita Natt	Traveller Type	Staff Member
Faculty/Division	Services and Resources	School/Branch	Expense Management
Travelling From	Adelaide	Travelling To	UK
Departure Date	01 Oct 2019	Return Date	15 Oct 2019
Passport Number		Passport Expiry	
Passport Country		Frequent Flyer Number	
Reason for Travel	Conference	TMC Booking Reference	
Department Id	123	Highest trip DFAT level is	L1 Normal precautions
Project Code	12345678		

Airfares

- In the Airfares section, enter the required information into the fields.

Note: All travel is economy class

Airfares

Depart Date	Depart Time	From	To	Fare Class
01 Oct 2019		Adelaide	London	Economy
15 Oct 2019		London	Adelaide	Economy

Please ensure you have completed the Departure and Return flight sectors.

- If required complete the Accommodation section, enter the required information into the fields.

Accommodation

Hotel Name	City	Date In	Date Out

- If required complete the Rental Car section, enter the required information into the fields. Corporate ID is not required for international rental car section. If the company name is unknown please leave the field blank.

Rental Car

Company Name	Corporate ID Type	Pick Up Location	Date	Time	Drop Off Location	Date	Time

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- If required complete the Other Travel Section, enter the required information into the fields. If the company name is unknown please leave the field blank. This can be used for services such as rail, ferry etc.

Other Travel						
Company Name	Type of Travel	Description	Travelling From	Travelling To	Depart Date	Depart Time
	▼					▼
	▼					▼

- Complete the Budgeted Costs section including all forecast expenditure for the trip.

Note: Incidental allowance is only applicable to **Staff Members**. The allowance covers the cost of low value expenses such as water, light snacks, car parking and tram tickets. It is claimed based on the number of nights away in line with ATO guidelines. For more information about incidental allowances and ATO Guidelines, please refer to the [Travel and Entertainment Policy and Procedures](#) on the University's Finance and Procurement Services website.

Budgeted Costs	
Amount	Details
Airfares	1800.00
Accommodation	2000.00
Rental Car	
Conference Registration	
Meals	2500.00
Dept Motor/Vehicle	
Field Trips	
Taxis/Parking & Tolls	300.00
Other Travel	
Incidental Allowance	520.00
	Nights <input type="text" value="13"/> Country <input type="text" value="United Kingdom"/>
	Nights <input type="text"/> Country <input type="text"/>
	Nights <input type="text"/> Country <input type="text"/>
	Nights <input type="text"/> Country <input type="text"/>
	Nights <input type="text"/> Country <input type="text"/>
	Nights <input type="text"/> Country <input type="text"/>
Total	7120.00

- After completion, click Save.

Other Details	
From:	To:
Company: The University of Adelaide	Company: Campus Travel
ABN: 61 249 878 937	ABN: 20 003 279 534
Sender Name: Nita Natt	Address: Level 16, 1 King William Street Adelaide SA 5000
Email: nita.natt@adelaide.edu.au	Phone: (08) 8211 6785
Phone: 8313 6366	Fax: (08) 7200 2050
Fax:	Email: adelaide@campustravel.com.au
Requisition No.: jgwzscmtb	

Cancel
 Delete
 Undo
 Save

Step 3


- The Accounts Codes window will be displayed.

Requisition: Details

[Print Travel Requisition](#)

Purchase Request: 31 Jul 2019
 Amount: \$7,120.00 AUD
 N Natt UK 1-15 Oct 19

Expense Types	Account Codes	Merchant Info	Approval			
	Bus Unit	Account	Dept ID	Project	Amount Incl	Tax Code
New International Travel Request - Airfares						
Line 1	UNIAD	2784	806	15017100	1800.00	GST EXCL
New International Travel Request - Accommodation						
Line 2	UNIAD	2782	806	15017100	2000.00	GST EXCL
New International Travel Request - Meals						
Line 3	UNIAD	2782	806	15017100	2500.00	GST EXCL
New International Travel Request - Incidental Allowance						
Line 4	UNIAD	2841	806	15017100	520.00	GST EXCL
New International Travel Request - Taxis Parking Tolls						
Line 5	UNIAD	2785	806	15017100	300.00	GST EXCL
More..		Balance	0.00			



Merchant/Description 

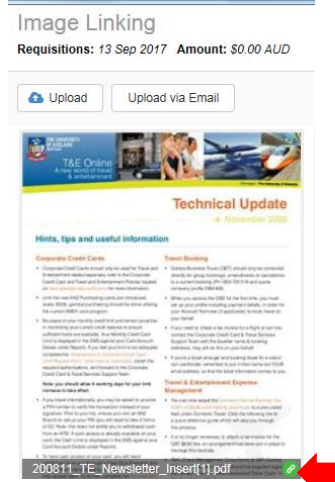
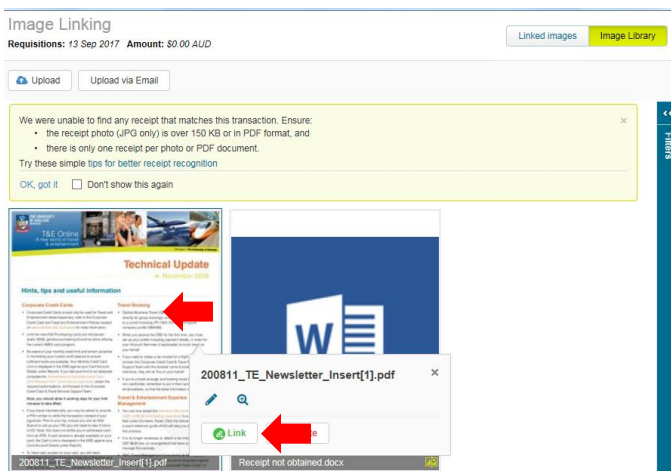
N Natt UK 1-15 Oct 19

Reason for Expense (Mandatory) - Please exclude any special characters.

Expense Management Conference

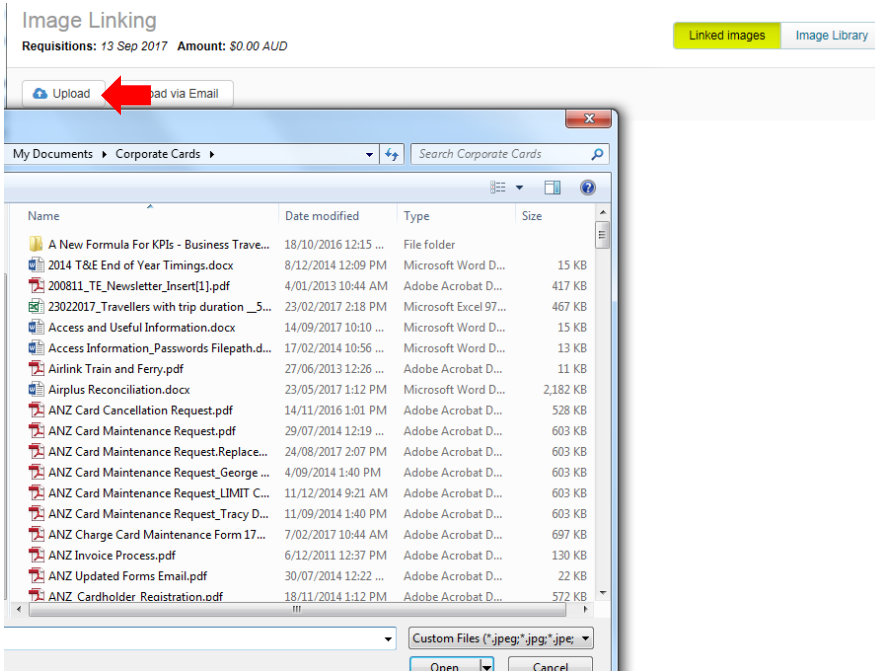
Close Delete Save

- Review the Dept ID and Project codes. If changes are required, select the desired codes by using the search option via the drop down arrow next to the Dept ID and Project columns.
Note: you may need to clear both codes prior to selecting the desired codes.
- The Business Unit and Account codes are set by default, please do not change this information.
- Attach supporting information to the requisition e.g. high risk travel form, keynote speaker invitation, conference registration and travel itinerary by clicking on the paper clip icon  to upload images.
- If the supporting documentation is already in the Fraedom "Image Library" click on the image and then click "Link"
- The symbol  will appear on the image and it indicates the image is "linked" to the current transaction.

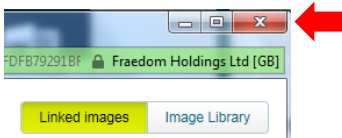


Create Amend or Cancel an International Travel Requisition in Fraedom

- If the image is saved on your computer select “Upload” and select the required document.




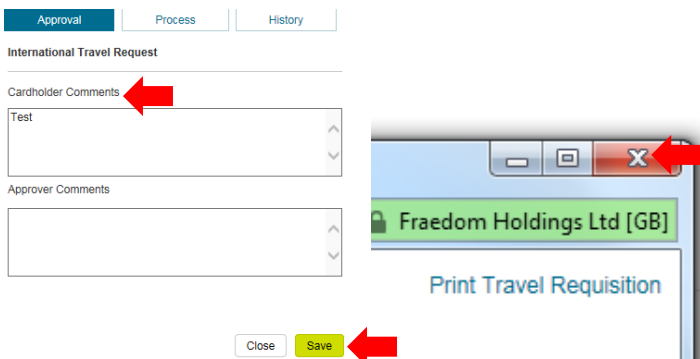
- Once you have attached all required images close the Image Linking screen.




- Provide the Reason for Expense (mandatory), e.g. Conference, Research Trip etc.
- After completion, click Save and the Summary Statement screen will display.

Step 4

- Comments can be added for the Travel Approver by clicking on the icon  and typing in the “Cardholder Comments” on the Approver tab.
- After completion, click Save, then close the Requisition Details window



Step 5

- The Account Statement (Requisition) window will be displayed. Click on the green arrow icon  to submit the international travel requisition for approval.





Account Statement

Requisition

Nita Natt - Summary Statement






Requisition Details - AUD

[Print Travel Requisition](#)

Tran Date	Summary	Receipt	Image(s)	Source Amount	Amount Tax	Amount Incl	
31 Jul 2019	N Natt UK 1-15 Oct 19		No		0.00	7,120.00	   
*This item has not been submitted for approval							



[Manage Receipt Images](#)

Requisition: Breakdown		Linked Items			
Category		Allocated	Card	Expense Reimbursement	Balance
New International Travel Request	Accommodation	2,000.00			2,000.00 
	Airfares	1,800.00			1,800.00 
	Incidental Allowance	520.00			520.00 
	Meals	2,500.00			2,500.00 
	Taxis Parking Tolls	300.00			300.00 
			7,120.00		

- The Requisition has now been submitted and is pending approval.
-





Account Statement

Requisition

Nita Natt - Summary Statement

Requisition Details - AUD

[Print Travel Requisition](#)










Tran Date	Summary	Receipt	Image(s)	Source Amount	Amount Tax	Amount Incl	
31 Jul 2019	N Natt UK 1-15 Oct 19		No		0.00	7,320.00	   



[Manage Receipt Images](#)

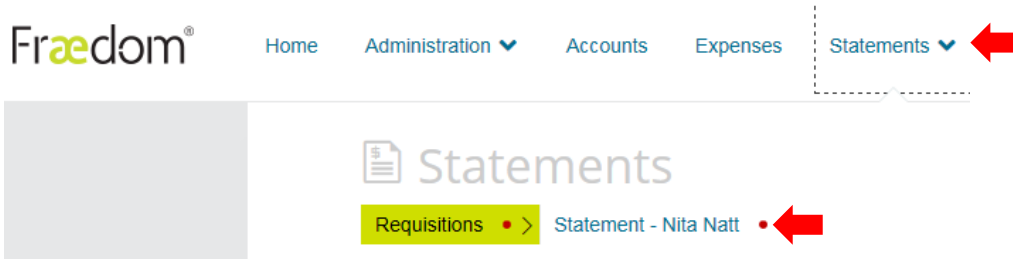
Note: The Travel Approver will now receive an email notification to view your requisition and continue the approval process.

When you view a travel requisition, the following symbols may be visible.

-  : Information required
-  : Approval required
-   : Information provided (first green tick); or requisition approved (second green tick)
-  : Attachment
-   : Description required (red); or requisition declined (black)
-  : Submit requisition for approval
-  : Un-submit requisition for approval

Step 6

- An email notification will be received by the account holder and their nominee if applicable.
- The booking confirmation then needs to be emailed to the TMC for the booking to be made/tickets issued. Access your Requisition via Statements:



- Locate your travel requisition and click on the title link.

Account Statement

Requisitions

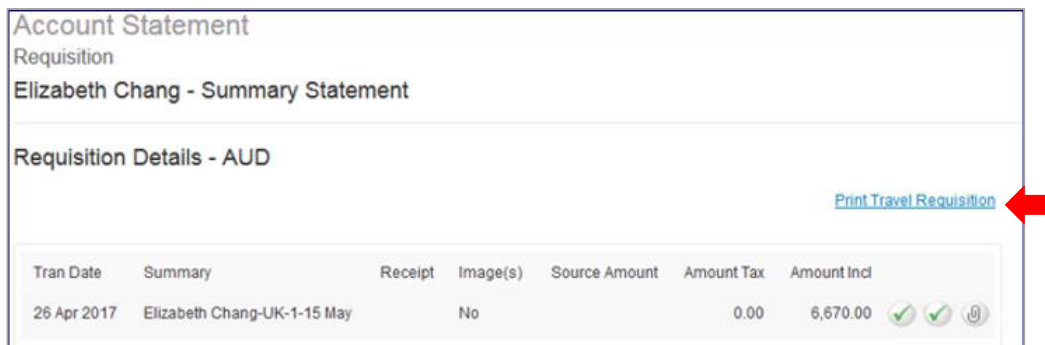
Nita Natt - Summary Statement

Requisition Summary		Linked Details			
Requisition	Posted	Amount	Items	Total	Balance
N Natt UK 1-15 Oct 19	Jul 2019	7,120.00			

Change View: [Current](#) [6 months](#) [12 months](#) [All](#)

The Account Statement (Requisition) window will be displayed.

- The second green tick indicates that the travel requisition has been approved by the Travel Approver.
- Click on the **Print Travel Requisition**.



The **New International Travel Request** pop-up window will be displayed.

- Scroll down to the **Traveller Confirmation** section and select the option **Email Booking Confirmation to the TMC**.
- Click on the email icon and this emails your request directly to the TMC.

TRAVELLER CONFIRMATION

The traveller confirms they have read and understand the following:

- review the University's [Travel Insurance Guide](#)
- agree to submit a [Travel Diary](#) for all international travel
- review the [Private Travel Guidelines](#)
- if the [DFAT](#) travel advice is level 3 or level 4 complete the high risk [Approval Form](#)

➔

✉ Email
🖨 Print

- If required, the TMC will respond to this email to discuss the requirements in more detail, including flight options and travel related issues such as passport and visa.
- When the itinerary is confirmed, airfares and accommodation will be paid by the University's Airplus virtual credit card and this cost will not affect your credit card limit.
- Once the payment is made, the TMC will email a copy of the tax invoice and itinerary to the traveller and/or account nominee, for information only.

Note: Payment for any travel of a personal nature must be made directly to the TMC at the time of booking and should not be charged to the University.

Additional Notes – Amendments and Cancellations:

- If there are significant changes to the travel date, destination or costs of travel, please revise your travel requisition.
- Your Requisition can be located by following **Part 1 Step 6**
- On the **Account Statement (Requisition)** window click on the first green tick

Account Statement

Requisition

Nita Natt - Summary Statement

Requisition Details - AUD

[Print Travel Requisition](#)

Tran Date	Summary	Receipt	Image(s)	Source Amount	Amount Tax	Amount Incl	
31 Jul 2019	N Natt UK 1-15 Oct 19		No		0.00	7,120.00	➔

[Manage Receipt Images](#)

- The Requisition: Details window will be displayed. Under the **Expense Types** tab, click on the New International Travel Request at the left of the screen.

Requisition: Details



[Print Travel Requisition](#)

Purchase Request: 31 Jul 2019
 Amount: \$7,120.00 AUD
 N Natt UK 1-15 Oct 19

Expense Types Account Codes Merchant Info Approval

Options

The links below are used to complete details about your proposed travel in order to gain approval prior to booking the travel. Click on the link and complete the form provided.

 [New International Travel Request 7,120.00](#)  [+ New International Travel Request](#)


- The Requisition: Details pop-up window will be displayed. On the Request Status section, select the option **Amended Travel**.

Policy Checklist

When completing this requisition the traveller is required to:

- review the University's [Travel Insurance Guide](#)
- agree to submit a [Travel Diary](#) for all international travel
- review the [Private Travel Guidelines](#)
- if the [DFAT](#) travel advice is level 3 or level 4 complete the high risk [Approval Form](#)

International Travel Requisition

Request Status	* Amended Travel 	Requested By	*Elizabeth Chang
Traveller Name	*Elizabeth Chang	Traveller Type	* Staff Member
Faculty/Division	*Services and Resources	School/Branch	*Expense Management
Travelling From	*Adelaide	Travelling To	*UK
Departure Date	*01 May 2017	Return Date	*15 May 2017
Passport Number		Passport Expiry	
Passport Country		Frequent Flyer Number	
Reason for Travel	* Conference	TMC Booking Reference	elizhgdntjjkd
Department Id	*806	Highest trip DFAT level is	* L 1 Normal precautions
Project Code	*15017100		

- Enter the revised information onto the relevant fields e.g. travel dates, airfares, accommodation and budgeted costs.
- Once completed scroll down to the bottom of the page and click Save.

Note: The Dept & Project codes revert to default settings if changes are made – always ensure the coding is correct on the “Account Codes” tab prior to saving.

- Comments can be added for the Traveller Approver as per **Part 1 Step 4**.
- The Travel Approver will receive an email notification that information has been revised and re-approval is required.
- When the travel requisition is re-approved, email it to the TMC to revise the bookings if necessary.

Cancelled Travel

- If travel is **cancelled** please submit a cancellation status by following previous steps.
- On the Request Status section, select the option **Cancelled Travel**. Once completed scroll down to the bottom of the page and click Save.

Policy Checklist

When completing this requisition the traveller is required to:

- review the University's [Travel Insurance Guide](#)
- agree to submit a [Travel Diary](#) for all international travel
- review the [Private Travel Guidelines](#)
- if the [DFAT](#) travel advice is level 3 or level 4 complete the high risk [Approval Form](#)

International Travel Requisition

Request Status	* Cancelled Travel	Requested By	* Elizabeth Chang
Traveller Name	* Elizabeth Chang	Traveller Type	* Staff Member
Faculty/Division	* Services and Resources	School/Branch	* Expense Management
Travelling From	* Adelaide	Travelling To	* UK
Departure Date	* 01 May 2017	Return Date	* 15 May 2017
Passport Number		Passport Expiry	
Passport Country		Frequent Flyer Number	
Reason for Travel	* Conference	TMC Booking Reference	
Department Id	* 806	Highest trip DFAT level is	* L1 Normal precautions
Project Code	* 15000001		

- You must call the TMC on (08) 8211 6785 to discuss the cancellation and any costs payable or refunds due.
- A cancelled requisition will not pass through any approval process. Please inform the Travel Approver or your line manager that you are no longer travelling.
- For some cancellations e.g. Medical, there may be grounds to seek reimbursement of non refundable expenditure via the University Travel Insurance – for advice, please contact Legal & Risk on: (08) 8313 4539 or helpdesklegal@adelaide.edu.au

Need help?

For further support or questions, contact Finance & Procurement Services on +61 8 8313 3330 or corporate.cards@adelaide.edu.au