

APPROVE QUICK REFERENCE GUIDE

USING APPROVE



Overview

Approve is a pre-trip approval tool. The user can submit a travel request for approval. Upon approval an authorisation code is generated which is then used for reporting.

User Types

Traveller

- Can only submit a trip request for themselves
- Update their own traveller profile information
- Receives notification email once request has been made

Travel Arranger:

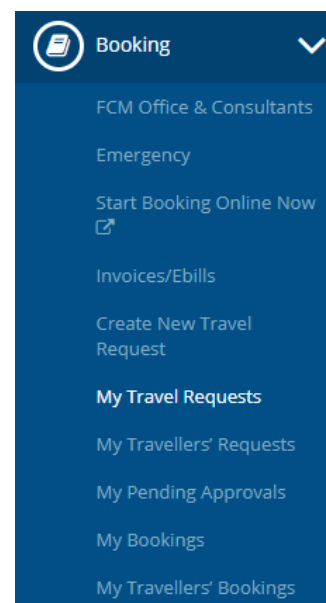
- Can submit a trip request for themselves, or on behalf of another traveller they have access to
- Update their own profile information as well as profile information for travellers they have access to
- Be assigned to individuals and/or groups
- Access to all travel requests arranged on behalf of travellers they have access to
- Receives notification email once request has been made

Authoriser:

- Responsible for reviewing trip details to ensure it complies with the company travel policy
- Trip must be approved or rejected
- Access to trips awaiting their approval, as well as previously approved and declined requests
- Receives notification email once request has been made

There are four options for selection: →

- 1. Create New Request** – select to create new request for authorisation to travel
- 2. My Travel Requests** – select to view pending and approved requests
- 3. My Travellers' Requests** – (Travel Arranger ONLY) select to view pending and approved requests
- 4. My Pending Approvals** – (Approver ONLY) select to view all pending requests to approve or reject



Creating a Request

Creating a Request

To create a new request for authorisation to travel:

- Select **Create New Travel Request**
- Enter traveller name – please select from auto complete list, family name first
- Enter travel arranger (if applicable) – please select from auto complete list, family name first
- Enter travel approver/s – please select from auto complete list, family name first
- Select **Launch Travel Planner**
- **Name for your Request** – this is free format text e.g. who/where/when GoodwinSydDec2020
- Select trip types required for planning your trip
- Select **Next**

Flights

- Select **Flight Type**
- Enter **Depart From** city - please select from auto complete cities displayed
- Enter **To** - please select from auto complete cities displayed
- Select **Departure Date** using the calendar icon
- Select either **Leave After** OR **Arrive Before**
- Select departure time using drop down menu
- Select **Booking Class**
- Repeat the above steps for **Return Date**
- Add comments if applicable e.g. Your preferred flight options
- Select **Next**
- The system will then take you through a wizard to complete the remainder of the travel sections (i.e. car & hotel) if these have been selected
- You can add additional travel sections into your request if required

Please note – Auto complete functionality is limited to the **Flights** section. Dates must be entered into all other travel sections, as these do not pre-populate from flight section. Even though pre-Booking Approval can include cost estimates, these costs are entered manually and are estimates only. They cannot be confirmed until the booking has been booked and confirmed.

Additional Details

- This section is configured to comply with your company's travel policy
- Please complete additional details to support your request
- Any sections marked with an (*) are mandatory
- Select **Back** if you need to go back to previous sections of your request
- Please complete additional details to support your request
- Select **Save** and **Review**
- You can **Edit My Trip** to edit any details in your request
- Alternatively, select **Confirm** and **Submit** or **Delete** if request is no longer required

Checklist

If configured, you will need to read and comply with any company specific requirements

Accept Terms and Conditions

- If configured, check the box if you have read, acknowledged and accept terms and conditions
- Select **Submit**
- Your travel request will be allocated a **TAR reference number**, which will be captured on your booking invoice and be emailed to your selected approver/s for authorisation.

My Travel Requests

For Traveller's

Select **My Requests** to view requests which you have created

Request Status buttons to choose from:

All will display all requests regardless of status

Incomplete will display all partially completed requests

Rejected will display all rejected requests

Pending Approval will display any requests awaiting approval

Partially Approved will display any requests which have been **partially approved** e.g. Waiting for a second approver to approve

Approved will display all approved requests.

- You can **View** or **Duplicate** a travel request if it has a request status of **Rejected, Approved** or **Partially Approved**
- You can **View, Edit, Duplicate** or **Delete** a travel request if it has a request status of **Incomplete** or **Pending Approval**



My Travel Requests

For Travel Arrangers

This button will only show for travellers with the Travel Arranger role. Select 'My Travellers' Requests' to view requests which you have created.

Request Status buttons to choose from:

All will display all requests regardless of status

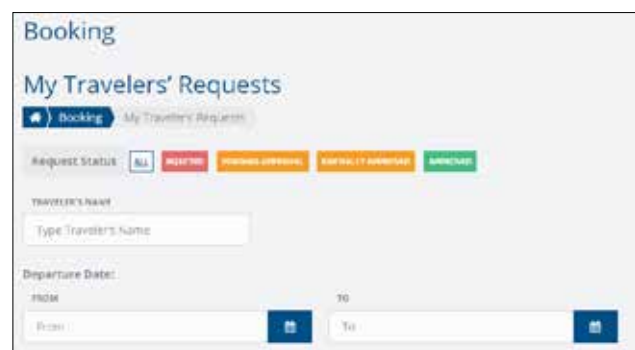
Rejected will display all rejected requests

Pending Approval will display any requests awaiting approval

Partially Approved will display any requests which have been **partially approved** e.g. Waiting for a second approver to approve

Approved will display all approved requests

- You can **View** or **Duplicate** a travel request if it has a request status of **Rejected, Approved** or **Partially Approved**
- You can **View, Edit, Duplicate** or **Delete** a travel request if it has a request status of **Incomplete** or **Pending Approval**



My Pending Travel Requests

For Authorisers

This button will only show to travellers with Approver role

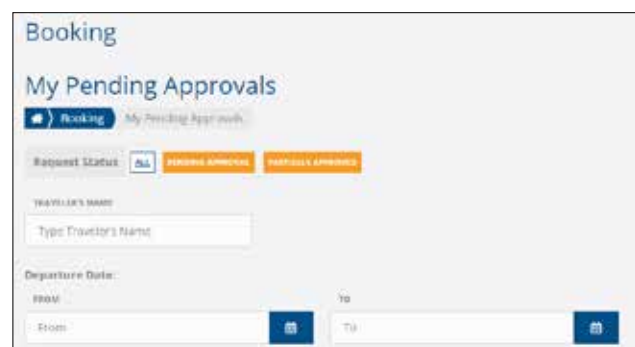
Request Status buttons to choose from:

All will display all requests regardless of status

Pending Approval will display any requests awaiting approval

Partially Approved will display any requests which have been **partially approved** e.g. Waiting for a second approver to approve

- Actions to select are **View, Approve, Reject**
- Select **View** to review the request details. This includes time/date stamp of all actions relevant to that travel request
- Select **Approve** or **Reject** to action your pending travel request approvals



Searching for travel requests

The search option is available within **My Travellers' Requests** and **My Pending Approvals** views. This allows you to search by the traveller's name, or using a specific date range

- Search by **departure date** allows you to specify a **from** and **to** date range to search. This will return travel requests with a departure date within the date range specified
- Search by **Travellers Name** allows you to search for travel requests for a specific traveller

Please note – To select a specific **Request Status** view, unselect all of the other status options by clicking on the status headings. Selected status views are highlighted in a darker colour (except the **ALL** option which is always white). Click on the selected status heading to select or unselect it.

Edit a request

The edit function is available under the **My Travel Requests** or **My Travellers' Requests** views for travel requests with an Incomplete or Pending Approval status. Use this function to edit any trip details or send the request to a different approver.

- Locate the request you need to change details for and click **Edit**
- Scroll to the bottom of the travel request details and click on **Edit my trip**
- This will take you back through the travel request wizard
- If you want to send the request to a different approver, select a different approver from the drop down list then click Launch Travel Planner. You will need to click Next through the request details, Save & Review, then Confirm & Submit
- If you want to change some of the trip details click **Launch Travel Planner**. Click **Next** to move through the request and update any details requiring changing. Click **Save & Review**, then **Confirm & Submit**
- Once **Confirm & Submit** is clicked, new emails will be triggered to the appropriate people

Duplicate a request

The duplicate function is available under the **My Travel Requests** or **My Travellers Requests** views for travel requests with any status. Use this function to duplicate any travel requests for another traveller or for different dates.

- Locate the request you want to duplicate and click Duplicate
- This will take you back through the travel request wizard

Delete a request

The delete function is available under the My Travel Requests or My Travellers Requests views for travel requests with an Incomplete or Pending Approval status. Use this function to remove any travel requests that are no longer required.

- Locate the request you want to delete and click delete, then confirm the deletion

Please note – Once a travel request has been deleted from the system, it cannot be retrieved, so a new request must be submitted.

Once request is approved

Once a travel approval has been received, the traveller/arranger will need to contact FCM to confirm their specific travel requirements and booking details. Get in touch by calling **8211 6785**, or email adelaide@fcmtravel.com.au