Access FCM Platform via the UQ Travel website under the **Travel Approval and Booking (Staff)** tile.

1.   FCM Platform home screen

Click on ☰ to view the menu below

The FCM Platform traveller management screen defaults so show your self-assigned profiles only.

Link to your profile

Link to Savi

Search your assigned travellers

See Section 5. Create a profile

Use filters to organise your travellers

⚠ PLEASE NOTE: The FCM Platform WILL TIME-OUT AFTER 15 MINUTES. Should this happen you must gain access by logging back in via *FCM Platform (profiles and booking)* under the *Travel Approval and Booking (Staff)* tab UQ Travel website. You <u>cannot</u> log back in via the FCM Portal Login screen.

2.   To search and self-assign an existing traveller profile:

Click on **add Travelers** tab and type the travellers name, select traveller from drop down options and click **Add**. The traveller will now appear in the list on your home screen.

Assigned message will appear.

Traveller profile will now appear on your home screen.

3.   To un-assign a self-assigned profile:

Select traveller from the list of self-assigned travellers on your home screen.

1. Click ⋮
2. Click Unassign traveler
3. Click Unassign.

Traveler Management / VanessaUQTravel Test Profile

① ②
☆ **VanessaUQTravel Test Profile** 👥 Unassign traveler ⋮

Manage this travelers trips, itinerary and profile information.

Manage this travelers trips, itinerary and profile information.

Unassign traveler ✕

You have selected this traveler to no longer be assigned to you. You can re-assign this traveler in future. This will happen immediately and does not require traveler approval.

③
Cancel   **Unassign**

Unassigned message will appear. Traveller profile will no longer show on your home screen.

④ ✓ The traveler has been unassigned from you ✕

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4.   Managing a self-assigned staff profile

Select the traveller from the list of self-assigned travellers on your home screen.

Manage this travellers' trips, itinerary and profile information.

Trips

Manage this traveler's trips and itinerary. Easily monitor travel alerts that may impact their trip.

Upcoming trips   Past trips

Traveler Management / VanessaUQTravel Test Profile

☆ **VanessaUQTravel Test Profile**   ⋮

Manage this travelers trips, itinerary and profile information.

📅 **Trips**
Access and update the upcoming trips of your travelers easily. You can also view past trips.

👤 **Profile information**
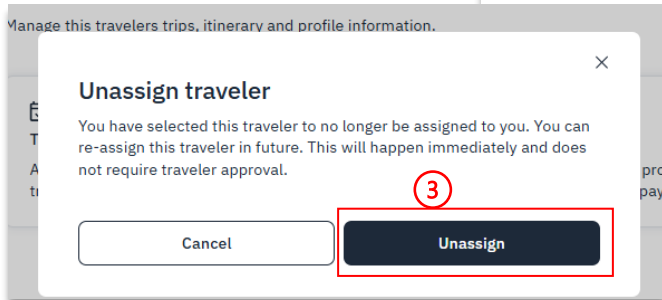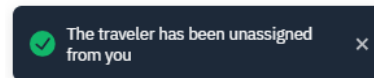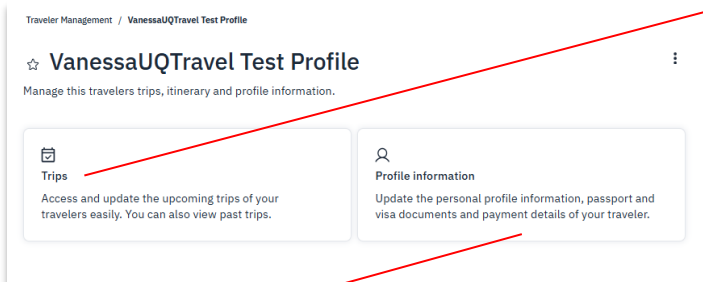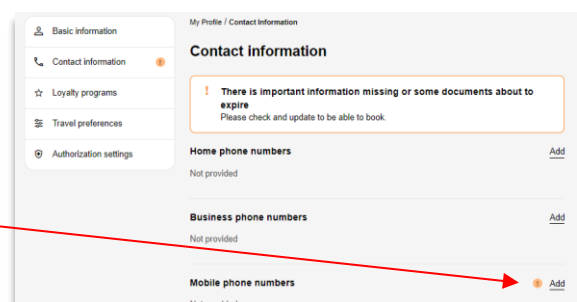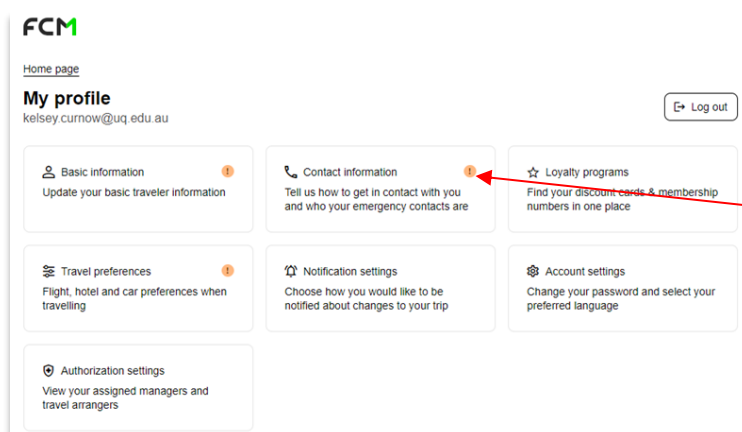Update the personal profile information, passport and visa documents and payment details of your traveler.

Where to next?

Trips booked with FCM will automatically appear here.

Profile Information: Update any missing mandatory information. Look out for the alert ⚠, click on the tab and add any missing details in the relevant section/s.

FCM

Home page
My profile
kelsey.curnow@uq.edu.au   ⟶ Log out

👤 **Basic information** ⚠
Update your basic traveler information

📞 **Contact information** ⚠
Tell us how to get in contact with you and who your emergency contacts are

☆ **Loyalty programs**
Find your discount cards & membership numbers in one place

✈ **Travel preferences** ⚠
Flight, hotel and car preferences when travelling

🔔 **Notification settings**
Choose how you would like to be notified about changes to your trip

⚙ **Account settings**
Change your password and select your preferred language

📍 **Authorization settings**
View your assigned managers and travel arrangers

👤 Basic information
📞 Contact information
☆ Loyalty programs
📶 Travel preferences
📍 Authorization settings

My Profile / Contact information
Contact information

⚠ There is important information missing or some documents about to expire
Please check and update to be able to book

Home phone numbers   Add
Not provided

Business phone numbers   Add
Not provided

Mobile phone numbers   ⚠ Add

⚠ A traveller will not appear in Savi if all mandatory information is not completed in the FCM Platform profile.

Mandatory information includes: (some details will be pre-populated)

- Prefix
- Name (must match your passport or national ID card)
- Gender
- Email address
- Preferred departure airport
- Mobile phone number

Key profile information - there are 3 main areas of a profile to check:

- **Basic information** – prefix, name, date of birth, passport, (visa if relevant)
- **Contact information** – mobile phone
- **Loyalty programs** - membership numbers

Basic information

The traveller's name MUST match what is shown in their travel documents (e.g. passport of national ID card).

This is the information that will be displayed on the travel documentation. It is the staff member's/travel arranger's responsibility to check the 'General information' details are correct before making a booking.

Gender and date of birth MUST be added to the profile before booking. This information is required by certain countries and airlines prior to travel.

This information is provided via a HR data feed and cannot be changed. This **is not** where a booking will be charged. All bookings via FCM/Savi will be charged to the traveller's default chart string in ExpenseMe Pro.

Storing passport details is very useful for two reasons:

- Details are automatically added to bookings for countries who require this before travel.
- A warning will be triggered in the **Basic information** section when a passport is within 6 months of expiry.

Click **Edit** or **Add** in the relevant section, update information and **Save/Add**. Repeat as required.

Contact Information

Make sure contact details are always up to date. This is important to ensure the traveller receives important information such as changes or emergencies whilst travelling.

Only the mobile phone number, and the email address in *Basic Information-General information* will be utilised for booking.

Any additional contact email you wish to use while travelling should be updated in the staff member's International SOS MyTrips profile.
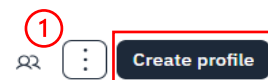
Click **Add** in the relevant section, update information and click **Add**. Repeat as required.

Loyalty programs

Store loyalty program details here to have them automatically added to a booking, allowing the traveller to take advantage of the benefits that go with the membership.

Click **Add** in the relevant section, update information and click **Add**. Repeat as required.

5.　**Create a profile (Non-UQ staff profiles only)**　Click tab at the top right of home screen　①　🧑‍🤝‍🧑　⋮　**Create profile**

New profile

To access the FCM Platform new employees require an account that is linked to your company/entity.

②
Create manually
You can create a profile for a new employee on their behalf, using the basic information you have about them.

Send invitation
Invite the new employee to create a profile for thems...

🚫 **NEVER** *Send invitation* to any traveller (UQ Staff, UQ student or Non-UQ person) to create a profile.

- UQ Staff profiles are auto-created.
- All Non-UQ staff profiles **must** be created by a travel arranger.

③ Complete ALL required fields (★). Click *Send*

⚠️ A traveller will not appear in Savi if all mandatory information is not completed in the FCM Platform profile.

Create manually

Get started by creating a profile for your new employee using the basic information you have about them.

★ Prefix
Choose an option...

★ First name *
First name

Middle name
Middle name

★ Last name *
Last name

Suffix
Choose an option...

★ Gender
Choose an option...

Nickname
Nickname

★ Email address *
Email address

Employee id
Employee id

🚫 Do not complete Employee ID

🚫 PLEASE NOTE: Including an email address will generate an email to the Non-UQ staff traveller advising them a profile has been created. They will not have access to FCM Platform, no action is required by the traveller.

If you receive an error noting the email address is in use, check there is no existing guest profile. If no profile exists, use a dummy email (e.g. add +uq to the email address. j.smith==+uq==@anu.edu.au)

All booking documents are forwarded to the UQ staff member making the booking, not the traveller.

★ Mobile phone
Not provided

Passport
Not provided

★ Departure airport
Departure airport

☐ Assign me as the arranger

★ Other employee info
Cost Centre code & name *
Please select an option

★ UQ ID (max 20 characters) *
UQ ID (max 20 characters)

★ Traveller type *
Please select an option

Tick this box if you wish to self-assign the profile

Enter Non-UQ staff UQ ID e.g. traveller first and last name.

Avoid using symbols such as - / ()

All profiles must have a unique UQID

🚫 Do not enter your staff UQ ID

Please select an option
UQ Employee
UQ Student
Non UQ one off traveller
Non UQ recurring traveller

🚫 **NEVER** create a profile for a UQ employee (staff member). All UQ staff profiles are automatically created via the data feed from Workday.

Additional information on FCM Platform and FCM Platform for mobile:

Refer to UQ Travel website for Six steps to travel (staff)

* FCM Platform for Mobile e-Learning module

* (may contain content not relevant to UQ travel arranger processes)