



# SAM

## SAM Workflow Guide - Requesters

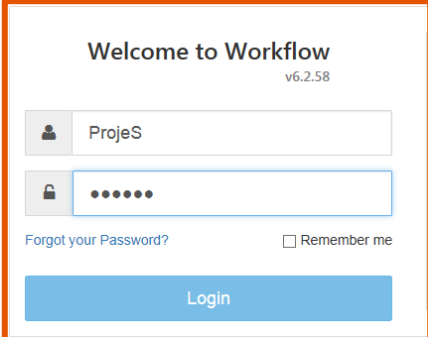
- How to make an adhoc booking
- How to reschedule a booking
- How to cancel a booking
- How to submit a roster booking
- How to submit a generic request
- How to create a profile
- How to submit a leave request
- Workforce Kiosk App

**Note:** You will require a login in order to request accommodation and travel through SAM – please contact the BMA travel team on [accommodation@bhpbilliton.com](mailto:accommodation@bhpbilliton.com) or call 1800 772 061 during business hours.

## Creating an Adhoc Booking – Accommodation and Travel

Follow this guide if you will be submitting a new adhoc (i.e. not an on roster) booking for accommodation and travel.

1. Login to workflow via –  
<https://workflowbma.osmotion.com.au>
  - Enter “Username” and “Password”
  - Click “Login”



Welcome to Workflow  
v6.2.58

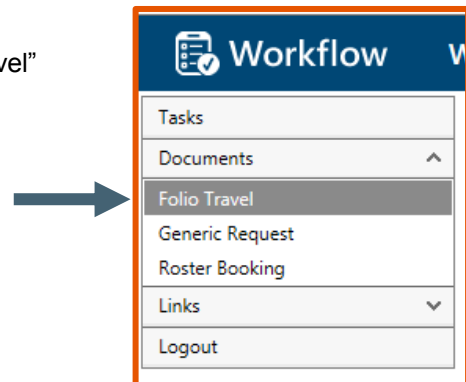
ProjeS

.....

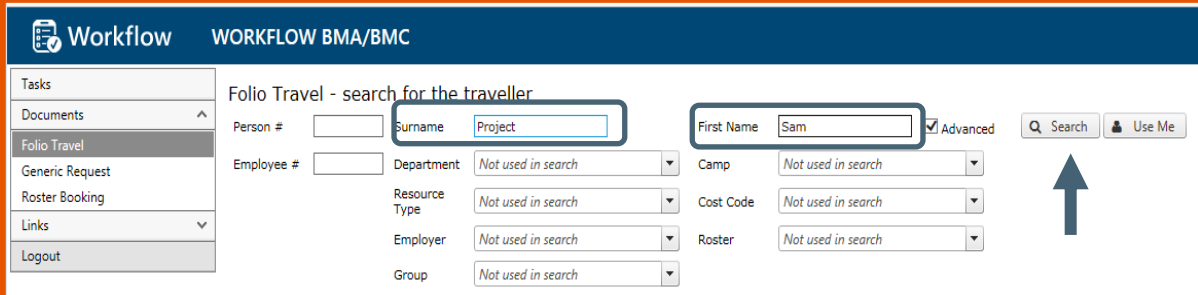
[Forgot your Password?](#) ☐ Remember me

Login

2. Via the left panel, select “Documents” and then “Folio Travel”



3. Search for the traveller's profile via their “last name” and “first name”. Then click “search”.



Workflow WORKFLOW BMA/BMC

Folio Travel - search for the traveller

Person # Surname Project First Name Sam

Employee # Department Not used in search Camp Not used in search

Resource Type Not used in search Cost Code Not used in search

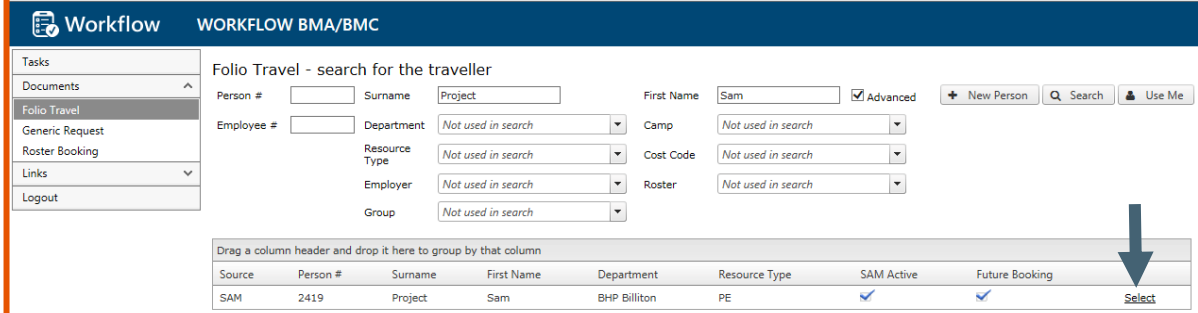
Employer Not used in search Roster Not used in search

Group Not used in search

Advanced Search Use Me

- If you are making a booking for yourself, you can select “Use Me” and your profile will be selected.

4. If their profile exists, select the correct person



Workflow WORKFLOW BMA/BMC

Folio Travel - search for the traveller

Person # Surname Project First Name Sam

Employee # Department Not used in search Camp Not used in search

Resource Type Not used in search Cost Code Not used in search

Employer Not used in search Roster Not used in search

Group Not used in search

New Person Search Use Me

Source	Person #	Surname	First Name	Department	Resource Type	SAM Active	Future Booking	
SAM	2419	Project	Sam	BHP Billiton	PE	✓	✓	Select

- If their profile does not exist, you will need to create their profile by selecting “New Person” before you can request a booking. Follow steps in “Create a New Profile”.

5. Select “Add a new booking” then “Next”

The screenshot shows the 'Workflow BMA/BMC' interface. On the left is a sidebar with 'Tasks' (Folio Travel, Generic Request, Roster Booking, Links, Logout) and 'Documents'. The main area has a 'Summary' section with fields for Request #, Request By (Sam Project), Requested (18/09/2017 15:20), Modified, and Subject (Sam Project). Below this is the 'Folio Travel - Request' section for 'Sam Project (2419)'. It features a calendar view from 04 Sep to 02 Oct. Under 'Travel Type', the 'Add New Booking' option is selected. A 'Next' button is at the bottom right.

6. Add “Site Visit”

The screenshot shows the 'Workflow BMA/BMC' interface. The 'Summary' section is identical to the previous screen. The 'Folio Travel - Booking' section for 'Sam Project (2419)' shows the same calendar. Below the calendar, there is a 'Traveller' section with a 'Requested' tab and a 'Traveller' dropdown. A 'Site Visit' dropdown menu is visible, and a blue arrow points to it. An 'Add' button is next to the dropdown. Below this is a table with columns: Date, Item, Description, Reference, Type, Status. The table is currently empty, showing 'No folio items.'

7. The following page will appear where you will need to choose from the available drop down options for accommodation and travel. You can submit multiple requests at one time as well. Once complete select “Save”

- Camp
- Check-in date and number of nights required.
- Shift status – ensure you select the correct type of shift to assist with room allocation
- Transport In/Out – you can select the following;
  - BMA charter flights – all available flights on this day will be available for selection

- If you are not on a BMA charter flight, select driving as transports.

**Site Visit**

Details Attachments Notes History

**Site**

Direction: To Site Camp: BUF Buffel Park Village Check In: [ ] Nights: 0 Status: New

Shift Status: DS Day Shift

**In Transport**

Depart: [ ] Transport: Please select Reference: [ ] Status: New

**Out Transport**

Return: [ ] Transport: Please select Reference: [ ] Status: New

8. Update the “Traveller” details in the second tab.

- Review and update details as necessary for this specific request. If the details for the profile are a permanent change, tick the check box to the right of the dropdown menu to update the profile.

Folio Travel - Booking

▼ **Sam Project (2419)** [Change Person](#)

19 Oct 20 Oct 21 Oct 22 Oct 23 Oct 24 Oct 25 Oct 26 Oct 27 Oct 28 Oct 29 Oct 30 Oct 31 Oct 01 Nov 02 Nov 03 Nov 04 Nov 05 Nov 06 Nov 07 Nov 08 Nov 09 Nov 10 Nov 11 Nov 12 Nov 13 Nov 14 Nov 15 Nov 16 Nov

Requested Traveller

**Traveller Details**

First Name \* Sam Surname \* Project

Mobile 0412 345 678 Email Address [ ]

Frequent Flyer # [ ]

**Site Details**

Cost Code \* BUF Caval Ridge [ ]

Department \* BHP Billiton [ ]

Employer \* BHP Billiton [ ]

Position MIE - Mine Employee [ ]

\* Traveller changes will only be applied if there are changes to the actual bookings

9. Select the “Requested” tab again and review the accommodation and travel selected.
10. Select the “Reason for Travel” from the drop down box.
11. Choose “Next Approval” and select the correct area to workflow for approval.
12. Provide any comments as required -
  - If you require a fatigue room at the beginning or end of this accommodation, please advise in this section for the Travel Team to action

- If accommodation will be a mixture of Days or Nights, please advise in this section for the Travel Team to action. E.g. DDNN

Folio Travel - Booking

▼ **Sam Project (2419)** [Change Person](#)

04 Sep 05 Sep 06 Sep 07 Sep 08 Sep 09 Sep 10 Sep 11 Sep 12 Sep 13 Sep 14 Sep 15 Sep 16 Sep 17 Sep 18 Sep 19 Sep 20 Sep 21 Sep 22 Sep 23 Sep 24 Sep 25 Sep 26 Sep 27 Sep 28 Sep 29 Sep 30 Sep 01 Oct 02 Oct

Requested Traveller

Site Visit + Add

Date	Item	Description	Reference	Type	Status	
25/09/2017 05:00		Travel IN on 25/09/2017 at 05:00 to DRV by Car		New	New	
25/09/2017 14:00		Accommodation at Buffel Park Village (BUF) from 25/09/2017 to 27/09/2017, (Day Shift)		New	New	
27/09/2017 23:00		Travel OUT on 27/09/2017 at 23:00 from DRV by Car		New	New	

Reason for Travel Testing

Request Document

Next Approval: **Approval Team** Send to: BMA [Send to another Approval Group](#)

Comments:

Save Cancel Request Submit

Document Route

Document History & Comments

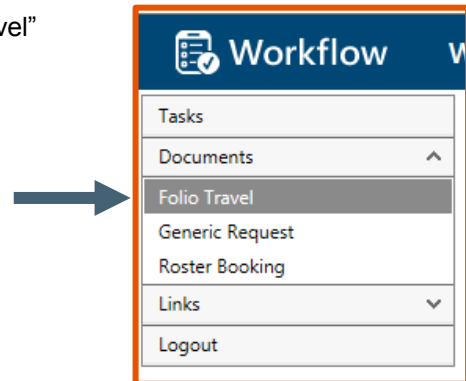
E.g. Fatigue room required at the beginning

- Once you have reviewed your request, click "Submit" to workflow for approval. If you select "Save", the request will **not** workflow and will remain in your task panel.

## Rescheduling a Booking

Follow this guide if you will be amending any current bookings in the system.

1. Via the left panel, select “Documents” and then “Folio Travel”



2. Search for the traveller’s profile via their “last name” and “first name”. Then click “search”.

The screenshot shows the 'Folio Travel - search for the traveller' form. It includes input fields for 'Surname' (containing 'Project') and 'First Name' (containing 'Sam'). There are also dropdown menus for 'Department', 'Camp', 'Resource Type', 'Cost Code', 'Employer', 'Roster', and 'Group'. A 'Search' button is visible on the right. A blue arrow points to the 'Search' button.

- If you are rescheduling your own booking, you can select “Use Me” and your profile will be selected.

3. Select the person you want to reschedule a booking for

The screenshot shows the 'Folio Travel - search for the traveller' form with the search results table displayed. The table has columns: Source, Person #, Surname, First Name, Department, Resource Type, SAM Active, Future Booking, and a 'Select' button. The first row of data shows 'SAM' as the source, '2419' as the person number, 'Project' as the surname, 'Sam' as the first name, 'BHP Billiton' as the department, 'PE' as the resource type, and both 'SAM Active' and 'Future Booking' are checked. A blue arrow points to the 'Select' button.

Source	Person #	Surname	First Name	Department	Resource Type	SAM Active	Future Booking	Select
SAM	2419	Project	Sam	BHP Billiton	PE	✓	✓	Select

4. Select “Reschedule/Change an Existing Booking ” then select “Next”

Summary

Request # New Requested 26/09/2017 09:40 Subject Sam Project

Request By Leonie Searson Modified

Summary Request for Sam Project

Folio Travel - Request

Sam Project (2419)

Travel Type

- ☐ Add New Booking
- ☒ Reschedule/Change an Existing Booking
- ☐ Remove Existing Booking

Next

5. Select the booking required to be rescheduled by ticking the check box next to the accommodation and/or transport. Then click “Select”.

Sam Project (2419)

Please select bookings to reschedule

Date From 02/11/2017 Date To 02/02/2018

Show Requested Show Confirmed Show Cancelled

All items checked Save Search

Cancel Select

Date	Item	Description	Booking Reference	Journey	Document	Booking Active	Workflow Active	Last Modified	Status
<input checked="" type="checkbox"/>	02/11/2017	Travel IN on 02/11/2017 to MOV at 0500 by Car				<input checked="" type="checkbox"/>	<input type="checkbox"/>	02/11/2017 19:51	Confirmed
<input checked="" type="checkbox"/>	02/11/2017	Accommodation at Buffel Park Village (BUF) from 02/11/2017 to 03/11/2017, (Day Shift)				<input checked="" type="checkbox"/>	<input type="checkbox"/>	02/11/2017 19:51	Confirmed
<input checked="" type="checkbox"/>	03/11/2017	Travel OUT on 03/11/2017 from MOV at 2300 by Car				<input checked="" type="checkbox"/>	<input type="checkbox"/>	02/11/2017 19:51	Confirmed

Cancel Select

6. The selected accommodation/travel will show in the “Requested” tab. Select the “Pencil Icon” to edit the booking.

Folio Travel - Reschedule

Sam Project (2419)

Requested Traveller

Site Visit Add

Date	Item	Description	Reference	Type	Status	
26/12/2017 18:00	4	Travel IN on 26/12/2017 at 18:00 to MOV by Plane QF2768		Confirmed	Confirmed	
26/12/2017 14:00	4	Accommodation at Buffel Park Village (BUF) from 26/12/2017 to 02/01/2018, (Night Shift)		Confirmed	Confirmed	
02/01/2018 20:25	4	Travel OUT on 02/01/2018 at 20:25 to BNE by Plane QF2769		Confirmed	Confirmed	

Reason for Travel

Request Document

Next Approval: Approval Team Send to: BMA

Comments:

Save Cancel Request Submit

7. From the “Site Visit” window make the necessary changes and then click “Save” – you can update the following;
  - Camp
  - Check-in date and number of nights
  - Shift status – you can update this if the traveller has now changed shifts
  - In/out transport – you can select any available charter flights or drive as an option

The screenshot shows the 'Site Visit' window with the following details:

- Site:** Direction: To Site, Camp: BUF Buffel Park Village, Check In: 26/12/2017, Nights: 7, Status: Confirmed.
- Shift Status:** NS Night Shift.
- In Transport:** Depart: 26/12/2017, Transport: QF2768 BNE 1800 - MOV 1950, Reference: [empty], Status: Confirmed.
- Out Transport:** Return: 02/01/2018, Transport: QF2769 MOV 2025 - BNE 2205, Reference: [empty], Status: Confirmed.

At the bottom right, there are 'Close' and 'Save' buttons. A blue arrow points down to the 'Save' button.

8. Review the rescheduled dates/transport to ensure they are correct – the edited dates will be highlighted and the status will say “modified”.

The screenshot shows the 'Folio Travel - Reschedule' window for 'Sam Project (2419)'. It includes a calendar view and a table of travel items.

Date	Item	Description	Reference	Type	Status	
26/12/2017 18:00	✈️	Travel IN on 26/12/2017 at 18:00 to MOV by Plane QF2768		Confirmed	Confirmed	🔍 ✎️
26/12/2017 14:00	🏠	Accommodation at Buffel Park Village (BUF) from 26/12/2017 to 02/01/2018, (Night Shift)		Confirmed	Confirmed	🔍 ✎️
02/01/2018 05:00	🚗	Travel OUT on 02/01/2018 at 05:00 from DRV by Car		Confirmed	Modified	🔍 ✎️ ✖️



9. Select the “Reason for Travel” from the drop down box.
10. Choose “Next Approval” and select the correct area to workflow for approval.
11. Provide any comments as required – e.g. a fatigue room, mixture of Days/Nights

Folio Travel - Reschedule

Sam Project (2419)

12 Sep 13 Sep 14 Sep 15 Sep 16 Sep 17 Sep 18 Sep 19 Sep 20 Sep 21 Sep 22 Sep 23 Sep 24 Sep 25 Sep 26 Sep 27 Sep 28 Sep 29 Sep 30 Sep 01 Oct 02 Oct 03 Oct 04 Oct 05 Oct 06 Oct 07 Oct 08 Oct 09 Oct 10 Oct

RR RR RR RR RR RR RR RR RR RR RR RR RR RR RR NS NS NS NS NS NS NS NS

Requested Traveller

Site Visit + Add

Date	Item	Description	Reference	Type	Status	
26/12/2017 18:00	✈️	Travel IN on 26/12/2017 at 18:00 to MOV by Plane QF2768		Confirmed	Confirmed	⊖ ✎
26/12/2017 14:00	🏠	Accommodation at Buffel Park Village (BUF) from 26/12/2017 to 02/01/2018, (Night Shift)		Confirmed	Confirmed	⊖ ✎
02/01/2018 05:00	🚗	Travel OUT on 02/01/2018 at 05:00 from DRV by Car		Confirmed	Modified	⊖ ✎ ✕

Reason for Travel

Request Document

Next Approval: **Approval Team** Send to: BMA

Comments:

Save Cancel Request Submit

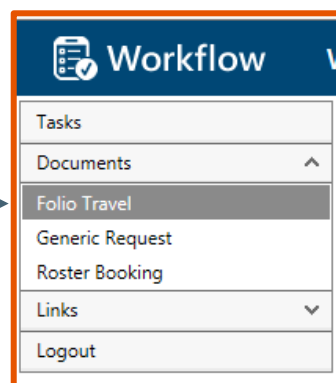
[Send to another Approval Group](#)

12. Once you have reviewed your request, click “Submit” to workflow for approval. If you select “Save”, the request will not workflow to site and will remain in your task panel.

## Removing Accommodation/Travel

Follow this guide if you want to cancel any bookings in the system

1. Via the left panel, select “Documents” and then “Folio Travel”



2. Search for the traveller's profile via their “last name” and “first name”. Then click “search”.

A screenshot of the 'Folio Travel - search for the traveller' form. The 'Surname' field is set to 'Project' and the 'First Name' field is set to 'Sam'. The 'Advanced' search checkbox is checked. A 'Search' button is visible on the right.

- If you are cancelling your own booking, you can select “Use Me” and your profile will be selected.

3. Select the person you want to cancel a booking for

A screenshot of the search results table. The table has columns: Source, Person #, Surname, First Name, Department, Resource Type, SAM Active, and Future Booking. The first row shows 'SAM', '2419', 'Project', 'Sam', 'BHP Billiton', 'PE', and 'Future Booking' is checked. A 'Select' button is at the bottom right of the table.

4. Select “Remove Existing Booking” and select “Next”

5. Select the booking/s required to be removed by ticking the check box next to the accommodation

A screenshot of the 'Folio Travel - Request' form. The 'Travel Type' section shows three options: 'Add New Booking', 'Reschedule/Change an Existing Booking', and 'Remove Existing Booking'. The 'Remove Existing Booking' option is selected. A 'Next' button is at the bottom right.

and/or transport. Then click “Select”.

- Sam Project (2419)

12 Sep

13 Sep

14 Sep

15 Sep

16 Sep

17 Sep

18 Sep

19 Sep

20 Sep

21 Sep

22 Sep

23 Sep

24 Sep

25 Sep

26 Sep

27 Sep

28 Sep

29 Sep

30 Sep

01 Oct

02 Oct

03 Oct

04 Oct

05 Oct

06 Oct

07 Oct

08 Oct

09 Oct

10 Oct

Please select bookings to remove

Date From

☒ Show Requested ☒ Show Confirmed ☐ Show Cancelled

Date To

All items checked

★ Save

🔍 Search

✕ Cancel

✔ Select

Drag a column header and drop it here to group by that column

Item 1 to 3 of 3

<input type="checkbox"/>	Date	Item	Description	Booking Reference	Journey	Document	Booking Active	Workflow Active	Last Modified	Status
<input type="checkbox"/>	31/10/2017	✈️	Travel IN on 31/10/2017 at 18:00 to MOV by Plane QF2768	5079			✓	✓	21/09/2017 12:29	Confirmed
<input type="checkbox"/>	31/10/2017	🏠	Accommodation at Buffel Park Village (BUF) from 31/10/2017 to 07/11/2017, (Night Shift)	5079			✓	✓	21/09/2017 12:29	Confirmed
<input type="checkbox"/>	07/11/2017	✈️	Travel OUT on 07/11/2017 at 20:25 to BNE by Plane QF2769	5079			✓	✓	21/09/2017 12:29	Confirmed

✕ Cancel ✔ Select

Please select bookings to remove

Date From:   ☒ Show Requested ☒ Show Confirmed ☐ Show Cancelled

Date To:

Drag a column header and drop it here to group by that column

Item 1 to 3 of 3

<input checked="" type="checkbox"/>	Date	Item	Description	Booking Reference	Journey	Document	Booking Active	Workflow Active	Last Modified	Status
<input checked="" type="checkbox"/>	31/10/2017		Travel IN on 31/10/2017 at 18:00 to MOV by Plane QF2768			5072			21/09/2017 12:29	Confirmed
<input checked="" type="checkbox"/>	31/10/2017		Accommodation at Buffel Park Village (BUF) from 31/10/2017 to 07/11/2017, (Night Shift)			5072			21/09/2017 12:29	Confirmed
<input checked="" type="checkbox"/>	07/11/2017		Travel OUT on 07/11/2017 at 20:25 to BNE by Plane QF2769			5072			21/09/2017 12:29	Confirmed

- Folio Travel - Remove

**Sam Project (2419)**

Requested Traveller

Date	Item	Description	Reference	Type	Status	Action
31/10/2017 18:00		Travel IN on 31/10/2017 at 18:00 to MOV by Plane QF2768	-	Confirmed	PleaseCancel	
31/10/2017 14:00		Accommodation at Buffel Park Village (BUF) from 31/10/2017 to 07/11/2017, (Night Shift)	-	Confirmed	PleaseCancel	
07/11/2017 20:25		Travel OUT on 07/11/2017 at 20:25 to BNE by Plane QF2769	-	Confirmed	PleaseCancel	

- Version 1.0

8. Choose “Next Approval” and select the correct department/individual to workflow for site approval.  
Note: No accommodation or travel will be cancelled by the Travel Team until site has approved this request.
9. Provide any comments as required

Folio Travel - Remove

Sam Project (2419)

12 Sep 13 Sep 14 Sep 15 Sep 16 Sep 17 Sep 18 Sep 19 Sep 20 Sep 21 Sep 22 Sep 23 Sep 24 Sep 25 Sep 26 Sep 27 Sep 28 Sep 29 Sep 30 Sep 01 Oct 02 Oct 03 Oct 04 Oct 05 Oct 06 Oct 07 Oct 08 Oct 09 Oct 10 Oct

Requested Traveller

Site Visit + Add

Date	Item	Description	Reference	Type	Status
31/10/2017 18:00	✈️	Travel IN on 31/10/2017 at 18:00 to MOV by Plane QF2768	-	Confirmed	PleaseCancel
31/10/2017 14:00	🏠	Accommodation at Buffel Park Village (BUF) from 31/10/2017 to 07/11/2017, (Night Shift)	-	Confirmed	PleaseCancel
07/11/2017 20:25	✈️	Travel OUT on 07/11/2017 at 20:25 to BNE by Plane QF2769	-	Confirmed	PleaseCancel

Reason for Travel

Request Document

Next Approval: **Approval Team** Send to: BMA

Comments:

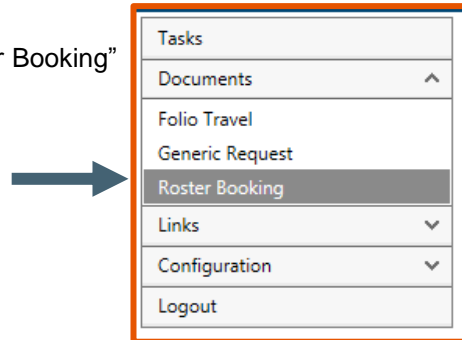
Save Cancel Request Submit

10. Once you have reviewed your request, click “Submit” to workflow for approval. If you select “Save”, the request will not workflow to site and will remain in your task panel.

## Roster booking

This document will be used to create a new roster for someone or to change someone from one roster to another.

1. Via the left panel, select “Documents” and then “Roster Booking”



2. Search for the traveller's profile via their “last name” and “first name”. Then click “search”.

A screenshot of the 'Roster Booking' form. The left sidebar shows 'Roster Booking' selected. The form has fields for 'Person #', 'Surname' (filled with 'Project'), 'First Name' (filled with 'Sam'), 'Employee #', 'Department', 'Camp', 'Resource Type', 'Cost Code', 'Employer', 'Roster', and 'Group'. All dropdown menus are set to 'Not used in search'. There is a 'Q Search' button and a 'Use Me' button. A blue arrow points to the 'Q Search' button.

- If you are creating a roster for yourself, you can select “Use Me” and your profile will be selected.

3. Select the profile.

A screenshot of the 'Roster Booking' form showing search results. The form fields are the same as in the previous screenshot. Below the form is a table with the following data:

Source	Person #	Surname	First Name	Department	Resource Type	SAM Active	Future Booking	
SAM	2419	Project	Sam	Infrastructure and Asset Management	PE	✓	✓	Select

A blue arrow points to the 'Select' button in the table.

4. Complete the “Roster Details”
  - Roster start date – this will be the first day the person travels to site and requires accommodation
  - Roster duration – only select 1 month as the system will automatically extend the roster out overnight
  - Select the available rosters from the drop down menu
  - Review/change any profile fields as required – if there are any permanent changes, tick the box next to each field for the profile to be updated permanently.
  - Transport Group – this is for the FIFO personnel only, if the group is unknown add a comment for the Travel Team to update as required.
5. Use the “Preview” button to check you have chosen the correct roster/start date

**Rosters**

**Four Example (2965)**  
 Mine Employee  
 BHP Billiton  
 BHP Billiton

DIDO 7/7 DS (6D 8R)  
 4505 581 849 Blackwater  
 Exa004  
 PE

B007 (BS Village Short Stay, Buffel Park Village)  
 NA

12 Sep 13 Sep 14 Sep 15 Sep 16 Sep 17 Sep 18 Sep 19 Sep 20 Sep 21 Sep 22 Sep 23 Sep 24 Sep 25 Sep 26 Sep 27 Sep 28 Sep 29 Sep 30 Sep 01 Oct 02 Oct 03 Oct 04 Oct 05 Oct 06 Oct 07 Oct 08 Oct 09 Oct 10 Oct

**Roster Details**

Roster Start:

Roster Duration (months):

New Roster:

Cost Code:  ☐

Department:  ☐

Employer:  ☐

Person Type:  ☐

Transport Group:  ☐

Commute Base:  ☐

Comments:

Attachments:

File	Description	Include as email attachment	Upload By	Uploaded Time
No Attachments				

**Request Document**

Next Approval: **Approval Team** Send to:

Comments:

6. Provide any comments as required
7. Once you have reviewed your request, click “Submit” to workflow for approval. If you select “Save”, the request will **not** workflow and will remain in your task panel.

## Generic Request

Generic requests are used to replace emails – submit any queries using this function directly to the Travel Team for action.

Any requests for new bookings/cancellations/amendments will be rejected as you will need to submit this through “Folio Travel”

**Tasks**

**Documents**

Folio Travel

**Generic Request**

Roster Booking

## Create a New Profile

Before creating a new profile, always try and search for the individual to avoid multiple profiles being created.

1. Search for the traveller by “Surname” or “First Name” and any additional fields as required.

Workflow WORKFLOW BMA/BMC

Folio Travel - search for the traveller

Person #  Surname  First Name  ☒ Advanced

Employee #  Department  Camp

Resource Type  Cost Code

Employer  Roster

Group

2. If the traveller is not found, click “New Person”

Workflow WORKFLOW BMA/BMC

Folio Travel - search for the traveller

Person #  Surname  First Name  ☒ Advanced

Employee #  Department  Camp

Resource Type  Cost Code

Employer  Roster

Group

Drag a column header and drop it here to group by that column

Source	Person #	Surname	First Name	Department	Resource Type	SAM Active	Future Booking	Select
SAM	2419	Project	Sam	BHP Billiton	PE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Select"/>

3. There will be three tabs with mandatory fields – Personal, On Site & Off Site
4. Fields marked with an asterisk are mandatory and must be completed before the profile can be created.

Folio Travel - Request

Personal On Site Off Site Other

First Name \*  Surname \*

☐ Female

Commence Date \*

Completion Date

Department \*

Cost Code \*

Email Address

Frequent Flyer #

Asset

Organisational Unit

Personnel Sub Area

**a. Personal tab**

- If female, tick the box otherwise it will assume the traveller is a male.
- Commencement date – back date by a month, incase the traveller does not start on the scheduled date.
- Completion Date – provide a date if the individual is only on site for a project/secondment and has an end date. This will complete their profile on that date.
- Cost Code, Department, Asset, Org Unit & Personnel Sub Area must be correct – if unsure contact your BMA representative to confirm.
- Email Address – provide the individuals email address, not a generic company email. All accommodation/travel confirmations will sent to this email address

**b. On Site tab**

- Employers are preloaded – if you are unable to find an employer, please submit a Generic Request to the Travel Team to action.
- Resource Type – identify which type based on their personnel number i.e. Service Contractor (800 series employee number), Permanent Employee (200 series employee number)
- Position – identify what position they are based. Anyone that isn't site based should be a Visitor.
- Roster – if on a roster select one otherwise they are a visitor
- Room Type – choose from the drop down menu, if unknown choose "AAA Approval Team Action"
- Commute Base – for FIFO choose point of origin, for DIDO choose Driving
  - Transport Group (FIFO Only) - Please add a comment to your booking advising what Crew you are on and the Approval Team will allocate.

The screenshot shows the 'Folio Travel - Request' form with the 'On Site' tab selected. The form contains several dropdown menus for 'Employer \*', 'Resource Type \*', 'Position \*', 'Roster \*', 'Room Type \*', 'Commute Base \*', and 'Transport Group'. To the right, there is a text field for 'Employee #' and two checkboxes labeled 'Active' and 'Hotel'. A 'Next' button with a right arrow is located at the bottom right of the form.

**c. Off Site tab**

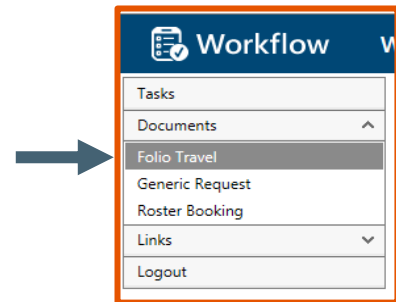
- Please add the travellers mobile number – this number is required if the individual wants to utilities the work force app to see their accommodation/travel itinerary

The screenshot shows the 'Folio Travel - Request' form with the 'Off Site' tab selected. The form features a 'Mobile' field with a dropdown menu for the country code (currently showing Australia) and a text input for the number (0412 345 678). A 'Next' button with a right arrow is positioned at the bottom right.



## Leave Request

1. Via the left panel, select “Documents” and then “Folio Travel”



2. Search for the traveller's profile via their “last name” and “first name”. Then click “search”.

A screenshot of the 'Folio Travel - search for the traveller' form. It includes fields for 'Person #', 'Surname' (containing 'Project'), 'First Name' (containing 'Sam'), and 'Employee #'. There are also dropdown menus for 'Department', 'Resource Type', 'Employer', 'Group', 'Camp', 'Cost Code', and 'Roster'. A 'Search' button with a magnifying glass icon is on the right, with a blue arrow pointing to it. A 'Use Me' button is also present. The left sidebar shows the 'Folio Travel' option selected under the 'Documents' category.


- If you are submitting leave for yourself, you can select “Use Me” and your profile will be selected.


A screenshot of the 'Folio Travel - Request' form for user 'Sam Project (2419)'. It shows a calendar view from 20 Oct to 17 Nov. Below the calendar, there are radio button options for 'Travel Type': 'Add New Booking' (selected), 'Reschedule/Change an Existing Booking', 'Remove Existing Booking', and 'Leave Request'. An orange arrow points to the 'Leave Request' option.

3. Enter in your “First Day” and “Last Day” of leave. Then select the tick next to it.

A screenshot of the 'Folio Travel - Request' form, specifically the 'Step 1' section. It asks 'What are the first and last working days of your leave?' and states 'Any R&R during this period will automatically be added.' There are input fields for 'First day' and 'Last day', each with a calendar icon. A checkmark icon is to the right of the 'Last day' field, with an orange arrow pointing to it. The calendar view above shows dates from 20 Oct to 17 Nov, with some dates marked with icons like a car or a train.

4. This will automatically calculate the number of days and leave and will provide a breakdown of this. It will also take into account any days on R&R

▼  Sam Project (2419)



Step 1

What are the first and last working days of your leave?

Any R&R during this period will automatically be added.

First day: 04/11/2017 - Last day: 07/11/2017

Step 2

First day	Last day	Duration	Leave Type
04/11/2017	04/11/2017	1 days	Annual Leave
05/11/2017	07/11/2017	3 days	Annual Leave
Total: 4 days			

- Review the leave days requested are correct – all accommodation and travel between these leave dates will be automatically removed once approved. The shift status will then change to AL for annual leave.
- Once you have reviewed your request, click “Submit” to workflow for approval. If you select “Save”, the request will **not** workflow and will remain in your task panel.

## Workforce Kiosk App

To access the Workforce Kiosk app you must ensure your mobile number is saved in your SAM profile first.

To view your accommodation and travel bookings – download the app through the Apple Store or Google Play store (Android Phones).

You will then be required to enter in your number and follow the prompts to access your bookings. Once logged in your will be able to see all your accommodation and/or travel.

**Please Note** – this app only allows the traveller to view bookings, you cannot amend/cancel bookings through the app. This must be submitted through workflow.