Event Attendance and Travel – Approver Guide

Introduction

This guide outlines the steps required for to review and approve or decline a request for staff event attendance and travel. Included in this guide are the following topics:

Contents

All event attendance and travel requests are to be approved by the applicant's Head of Department or Manager. Requests with an international travel component require additional approval from their Divisional Head.

Navigating to the approval form

There are two ways to navigate to an approval form: via e-mail or via My Nintex.

Email approval

Once an event attendance and travel request has been submitted, the nominated approver will receive an e-mail to their personal email address containing a link to an approval form.
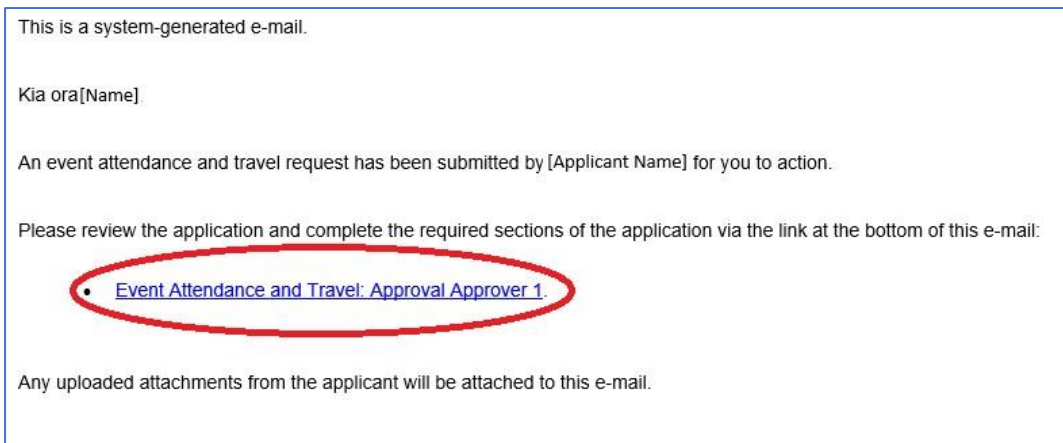
My Nintex approval

Alternatively, you can log into your My Nintex Dashboard:

- [My Nintex Dashboard](#)

All active tasks assigned to you are listed on both the Dashboard and under Tasks in the left-hand navigation.

Clicking on the request you would like to review will open the approver form, along with workflow details in a panel on the right.

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Reviewing the request

1. Review the applicant's request, pages 1-5 of the approver form, and any supplied attachments in the approver email.

2. On the Approver page, page 6:
   a. First approvers:
      If there is an international travel component, complete the *International travel* section. In some instances, the first approver may also be the international approver, if this is the case, select *Yes* at the question: I am the international approver. Otherwise, select *No* and start typing the name of the appropriate Divisional Head.
      <u>Note</u>: Select the staff member's personal University email rather than role-based accounts e.g. e.g. Jane Smith (jane.smith@otago.ac.nz) instead of divisional.office@otago.ac.nz
   b. International travel approvers:
      Review the first approver comments.

3. Record your decision, *Approve* or *Decline*, and add comments as desired.
   <u>Note</u>: all comments entered will be visible to the applicant (and the international approver, if required).

Any minor amendments to the application that are being approved should be mentioned in this comments box. Any major changes, such as an additional route, additional accommodation or different class of travel will require a new request to be submitted.

Approval

Decision *
○ Approve   ○ Decline

Approver's comments (will be shown to the applicant) *

[   ]

Related links

- [Travel and Travel Related Costs Policy](#)
- [Travel Planning Procedure](#)
- [Conference Leave Policy](#)
- [Sensitive Expenditure Policy](#)
- [Sensitive Expenditure Procedure and Guidelines](#)
- [Air travel and greenhouse gas emissions](#)
- [Purchase Card Policy](#)
- [Purchase Card Procedure](#)

Support

For queries relating to work-related leave and/or travel requests, please contact your administrative support.

For queries relating to the form or workflow functionality in Nintex Automation Cloud, or to provide feedback/update requests for this guide, please contact process.improvement@otago.ac.nz.