

Applying for Operations Staff Travel and/or Conference Attendance

Introduction

This guide outlines the steps required to submit an application for Operations Staff travel and/or Conference attendance.

- Preparing to apply
- Navigating to the Operations Staff Conference, Study and Professional Attendance application form
- Creating a new application
- Completing an application
- Saving the application to return to later
- Submitting the application
- Making changes to a submitted application

Preparing to apply

Before submitting an Operations Staff Travel and/or Conference Attendance application gather all relevant information ready for uploading:

- An indication of costs for flights and/or accommodation
- Any relevant conference activities or 'invitations to speak' documents
- Meeting dates and itinerary details
- If applicable, confirmation from your Line Manager that they approve and support your application.

Noting that your application will be sent to the Director of your Division and the Chief Operating Officer for final approval.

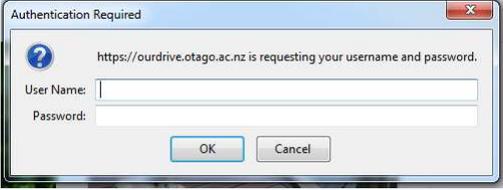
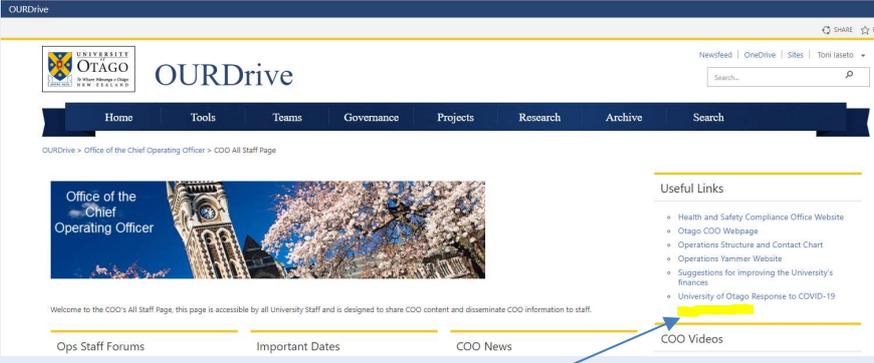
- Any relevant supporting documents from external organisations (e.g. A letter or email from another University or invitation from a partner organisation).

It is expected that approval is gained prior to accepting invitations.

Navigating to the application

The Operations Staff Travel and/or Conference Attendance application is located on the COO's All-Staff OURDrive Team site.

To navigate to OURDrive and the application form, follow the below steps:

STEP	EXAMPLE
1. Navigate to OURDrive and login. ourdrive.otago.ac.nz	
2. In OURDrive, select "Office of the Chief Operating Officer All-Staff Site".	
3. Select "Apply for Operations Staff travel and/or Conference Attendance" in the sidebar.	

Creating a new application

The screenshot displays the OURDrive web application interface. At the top left is the University of Otago logo with the text 'UNIVERSITY OF OTAGO' and 'Te Whare Wānanga o Ōtago NEW ZEALAND'. To the right of the logo is the 'OURDrive' title. Below the title is a dark blue navigation bar with tabs for 'Home', 'Tools', 'Teams', 'Governance', 'Projects', 'Research', and 'Arc'. The 'Tools' and 'Governance' tabs are circled in red. Below the navigation bar is a breadcrumb trail: 'OURDrive > Office of the Chief Operating Officer > COO All Staff Page > Operations Travel and/or Conference Attendance'. The 'Office of the Chief Operating Officer' and 'COO All Staff Page' links in the breadcrumb are also circled in red. On the left side, there is a box containing 'COO All Staff Page' and a link 'COO All Staff Page'. To the right of this box is a '+ new item' button, which is highlighted in yellow. Below the button are tabs for 'By Status', 'All Items', and 'Awaiting my approval', followed by a search box labeled 'Find an item'. Below the search box is a table header with columns: 'Title', 'Selected User', 'Country', 'Name of Event', 'From Date', 'To Date', 'Division Name', 'Department', and 'Head of Department'. Below the table header is the text: 'There are no items to show in this view of the "Operations Travel and/or Conference Attendance" list.'

Select 'new item' to generate a new application form.

Completing an application

Application for Travel (Domestic and International) and/or Conference Attendance			
Useful Links	Operations Travel Policy	Travel Planning Procedure	Travel Insurance Policy
When to use	Travel Alert	Travel Related Costs Policy	
Name:	<input type="text" value="Toni Iaseto"/>	 	
Contract:	<input type="text" value="Fixed Term Part-time"/>	<input type="text" value="v"/>	
Division:	<input type="text" value="Operations"/>	<input type="text" value="v"/>	
Department:	<input type="text" value="Enabling Excellence"/>	<input type="text" value="v"/>	
Position Title:	<input type="text" value="Project Manager"/>		
Date of Application:	<input type="text" value="16/10/2020"/> 		
Name of Conference or Event:	<input type="text" value="Project Management Conference"/>		
Location:	City: <input type="text" value="Auckland"/>	Country: <input type="text" value="NZ"/>	<input checked="" type="checkbox"/> In NZ?
Dates of Conference or Event:	<input type="text" value="2/11/2020"/> 	To: <input type="text" value="5/11/2020"/> 	
Dates of Absence from Campus:	<input type="text" value="2/11/2020"/> 	To: <input type="text" value="6/11/2020"/> 	
Number of Annual Leave Days:	<input type="text" value="1"/>		
Proposed Annual Leave Dates (dd/mm):	<input type="text" value="Friday 6th Annual leave"/>		

Conference:	<input checked="" type="checkbox"/> Presenting / Speaking <input type="checkbox"/> Attending / Participating <input type="checkbox"/> Workshop Attendance <input type="checkbox"/> Chairing / Panel Member																																
Professional Activity / Meeting:	<input type="checkbox"/> Board Member <input checked="" type="checkbox"/> Guest Speaker <input type="checkbox"/> Site Visit <input type="checkbox"/> Stakeholder / Client Meeting																																
Purpose of Travel and/or Conference Attendance:	Professional Development																																
Approval:	<ul style="list-style-type: none"> Please upload confirmation from your Line Manager that they approve and support this travel and/or conference attendance Please include an estimate for flights, accommodation, registration and travel costs Optional: <ul style="list-style-type: none"> Calendar showing Conference, Travel and A/L days 																																
Add supporting documents/quotes:	<input type="button" value="@ Click here to attach a file"/> ✗ Approval to Travel - Toni Iaseto.msg <small>(Please ensure your file names do not contain ~ # % & * { } \ : < > ? / + and are no longer than 100 characters)</small>																																
Funding:	<table border="0"> <tr> <td></td> <td style="text-align: center;">Estimated Total Costs (\$NZ)</td> <td style="text-align: center;">External Funding (\$NZ)</td> <td><input type="text"/></td> </tr> <tr> <td>Travel</td> <td><input type="text" value="340"/></td> <td></td> <td></td> </tr> <tr> <td>Accommodation</td> <td><input type="text" value="470"/></td> <td></td> <td></td> </tr> <tr> <td>Sustenance</td> <td><input type="text" value="80"/></td> <td></td> <td></td> </tr> <tr> <td>Registration</td> <td><input type="text" value="1200"/></td> <td></td> <td></td> </tr> <tr> <td>Shuttles/Taxis/Rental Cars</td> <td><input type="text" value="70"/></td> <td></td> <td></td> </tr> <tr> <td><u>Insurance</u></td> <td><input type="text"/></td> <td></td> <td></td> </tr> <tr> <td>Total</td> <td>\$2,160.00</td> <td></td> <td></td> </tr> </table>		Estimated Total Costs (\$NZ)	External Funding (\$NZ)	<input type="text"/>	Travel	<input type="text" value="340"/>			Accommodation	<input type="text" value="470"/>			Sustenance	<input type="text" value="80"/>			Registration	<input type="text" value="1200"/>			Shuttles/Taxis/Rental Cars	<input type="text" value="70"/>			<u>Insurance</u>	<input type="text"/>			Total	\$2,160.00		
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Fill out the application and upload relevant documents as required. You must select from the dropdown menus where they are provided, and fields marked with a red asterisk are mandatory.

For more guidance on filling out this form, please refer to the table below.

FIELD	INSTRUCTIONS
Name	Enter your full name. If you receive the following message: <i>"No exact match was found. Click the item(s) that did not resolve for more options."</i> , click on your name and select the correct option from the dropdown list
Contract	Use the dropdown menu to select the correct contract.
Division and Department	Use the dropdown menu to select your division and department.

Role	Type in your role.
Date of Application	This date should be auto-filled, but if not, use the calendar to select the date of application.
Name of Event	Type in the name of the conference or event being attended.
Location	Type in the location (city, country) of the event. Remember to uncheck the 'in NZ' box if the conference is located outside of New Zealand.
Dates	Use the calendars to enter the start and end dates of the conference or travel.
Dates of Absence	Use the calendars to enter the full range of dates you will be away.
Number of Annual Leave Days	If you plan on using any annual leave in conjunction with the conference leave, enter the number of annual leave days you plan to use on the trip.
Proposed Annual Leave Dates	If applicable, enter the dates on which you plan to use your annual leave. Noting that once approved, you need to apply for the leave in web kiosk.
Conference:	If attending a conference, check what your role will be at the conference. You may check more than one box.
Professional Activity / Meeting	If travelling for business purposes, check the box that best applies to you.
Purpose of Travel and / or Conference Attendance	Type in a justification on why you should attend the conference or why you are requesting to travel. This box is limited to 255 characters, so keep your justification brief. Select Click here to attach a file to upload relevant materials. The following must be included: <ul style="list-style-type: none"> • Quotes from approved travel agents for international flights and an indication of costs for domestic flights, accommodation, expenses. • Conference details (flyer, invitations, registration). • Email approval from your Line Manager. • Any other documents that you feel will support your application. The following documents are optional to include, but may help you plan for your leave: <ul style="list-style-type: none"> • Calendar showing conference, travel, and annual leave days. This is useful if you are undertaking multiple activities, including taking leave.
Funding	<ul style="list-style-type: none"> • Enter the estimated costs of your travel. • Enter any external funding source on the right hand side, including self-funding.

Saving the application to return to later

Select the *Save for completion later* button to save the application so that it can be completed at a later time.

ion marking is covered while I am away and the arr
al leave is covered.



A screenshot of a web form showing a button labeled "Save for completion later". The button is highlighted with a red circle.

To continue with the application, navigate back to the *Apply for Operations Staff Travel and/or Conference Attendance* page (as outlined above) and select the application from the list of items.

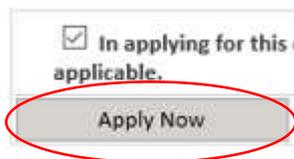
Submitting the application

Before submitting the application, check the box confirming that the appropriate arrangements have been made for the leave period.



A screenshot of a web form. It features a checkbox with a checkmark, followed by the text "In applying for this conference leave I confirm my work commitments are covered while I am away, if applicable." Below this text are two buttons: "Apply Now" and "Save for completion later". The checkbox is highlighted with a red circle.

Once you have checked this box, you can then submit the application using the *Apply Now* button.



A screenshot of a web form showing the "Apply Now" button highlighted with a red circle. Above the button is a checked checkbox and the text "In applying for this conference leave I confirm my work commitments are covered while I am away, if applicable."

You will receive email notifications (examples in the appendix) as your application moves through the following approval process:

The application will be sent to the Director of your Division for approval. They can decline your application and request further information or approve the form so that it is then sent on for final approval by the Chief Operating Officer.

The Chief Operating Officer will review and assess the application and then approve or decline it. Once your application is **approved**, you can start [Booking travel arrangements](#).

If your application is **declined**, review the supplied feedback comments and if required resubmit your application with any further documentation or changed information. Refer to the *Making changes to a submitted application* section below.

Making changes to a submitted application

If changes need to be made to an application, proceed as follows:

- If the application's form status is '*In progress*', make the required changes and submit for approval: Navigate to the application and select '*Edit Item*' at the top-left of the screen. Once you have made the changes, resubmit your application for approval.
- If the application's form status is '*Submitted*', contact your Executive Assistant to the Director of your Division to change the status of the application back to '*In progress*', and proceed with the changes and resubmit the application.
- If the application's form status is '*Director approved*', contact your Executive Assistant to the Director of your Division for further action.

In the event that the change results in increased costs or additional leave, a further application may be required.

Related links

- Visit the webpage for Operations Staff Travel and/or Conference Attendance
- [View the process map for Operations Staff Conference, Study and Professional Leave](#)

Support

For any support with accessing OURDrive contact AskOtago:

- Tel +64 3 479 7000 or 0800 80 80 98
- Email askotago.it@otago.ac.nz

For any further assistance or support with completing the form please contact your Client Service Administrator in the first instance, or Toni Iaseto in the Enabling Excellence team toni.iaseto@otago.ac.nz

Appendix

1. Confirmation - Application has been submitted.

Operations Travel and/or Conference Attendance Request



COO All Staff Page <no-reply@otago.ac.nz>
To Toni Iaseto
Cc Toni Iaseto

Reply Reply All Forward ...

Fri 16/10/2020 12:45 PM

You forwarded this message on 16/10/2020 12:54 PM.

Kia ora,

An Operations Travel and/or Conference Attendance Request has been submitted by Toni Iaseto for Project Management Conference.

As the Director/Head of your Division/Office, you are invited to approve this request. This form will then be forwarded to the Chief Operating Officer for final approval and the outcome communicated to you and the applicant.

The applicant should have uploaded confirmation from their Line Manager that they approve and support this travel and/or conference attendance.

[Please review the application here.](#)

Nāhaku noa nā

2. Confirmation – Travel approved

Operations Travel and/or Conference Attendance Request



COO All Staff Page <no-reply@otago.ac.nz>
To Toni Iaseto
Cc Toni Iaseto

Reply Reply All Forward ...

Fri 16/10/2020 12:45 PM

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