

Welcome to the NBS Travel Town Hall

June 25, 2003 – Natcher Auditorium

June 26, 2003 – Neuroscience Center

July 8, 2003 – Natcher Auditorium

July 16, 2003 – Executive Plaza North (EPN)

- Welcome and Introductions
- Agenda
 - NBS Travel Refresher Training
 - NIH Portal Demonstration
 - Travel Users Community
 - NBS Travel System
 - Functionality Updates
 - Demonstration
 - Break/Workshop
 - Traveler Process Demonstration
 - Certifying Travel Documents
 - NIH Portal – My Travel Documents
 - Approving Travel Documents Demonstration
 - Adding Non-NIH Travelers to NBS Travel System
 - “Cut-Over” Plan
 - NBS Travel Support Resources
 - Post-Town Hall Workshop

- 4 Important Things to Remember
- Refresher Training Overview
- Accessing the NBS Travel System “Sandbox” via the NIH Portal
- System Updates
- Travel Type Workflows (Authorizations and Vouchers)
 - Domestic
 - Foreign
 - Local
 - Sponsored
- Traveler Review and Certification of Travel Documents
- Approval of Travel Documents
- Support Resources and NBS Travel System “Cut-Over” Plan
- nVision Information

4 Important Things to Remember about the NBS Travel System

1. Accounting Code Information
2. Other Authorizations
3. Email Notification
4. Final Voucher Checkbox



NBS Travel Refresher Training

*Refresh your skills and knowledge
June 17, 2003 through August 29, 2003*

NBS Travel Refresher Training (all optional*)

Travel Town Halls

Tuesday's Travel Tips

NBS Travel Refresher Workshops

NBS Travel Refresher Training Website

http://nbs.nih.gov/Travel_Refresh_Training.html

**Prior to go-live, your IC will determine your readiness to begin using the NBS Travel System. This Travel Refresher Training will help you prepare for the transition to the new travel system.*

NBS Travel System will go live September 1, 2003

NIH Portal (Website link – <http://my.nih.gov>)

- **The NIH Portal**
 - Your single pathway to data, documents, and processes
 - **Communities**
 - Contains all the information you need to do your job
 - **Sign in to the NIH Portal using your**
 - NIH Domain
 - Username
 - Password
-  **Note:** This is the same information you currently use to log on to the computer at your workstation
- **NIH Login**
 - Once signed on to the NIH Portal, you have direct access to the NBS Travel System

*For help with
the Portal*



Contact TASC at Go-CIT (301.594.6248)

*For help with the
NBS Travel System*



*Contact your IC's Help Point of Contact (HPOC)
for assistance: <http://nbs.nih.gov/pdf/HPOC.pdf>*

Travel Users Community

- **Application Launcher** – access the NBS Travel System
- **Currency Converter** – calculates currency exchange rates for foreign travel
- **Per Diem Rates** – search GSA Per Diem rates, US County Lookup for County Per Diem rates
- **Travel Forms** – provides links to common forms such as a NBS Travel Request Form, Hotel State Tax Exempt Form, Premium Class Travel Authorization Form
- **Useful Resources** – includes helpful links, such as FEMA Certified Hotel Listing, Airline City Pairs, VISA Travel Card - ATM Locator
- **Policy and Regulations** – links to information on travel policy including the NIH Travel Manual and Federal Travel Regulations

Travel Users Community

- **International Travel** – includes links related to foreign travel such as the Notification of Foreign Travel form, US Embassies, Passports and Visas, Travel Health Information
- **Travel Planners Support and NBRSS Training** – provides instruction for obtaining help using the NBS Travel System and gives information about upcoming Travel Training classes

- **Auto Name**
- **“Itinerary” Screen**
- **“Available Projects” Screen**
- **“Other Authorizations” Screen**
- **Travel Authorization Numbers**
- **Sign, Stamp and Route function**
- **Reviewing & Approving function**

Role ... Travel Planner

- Create Travel Authorization
 - New System Functionality with Accounting Code screen
- Route Travel Authorization

Note:

- *The live NBS Travel System will NOT require an additional sign-on once you have signed on to the NIH Portal.*

Break

Role ... Traveler

- Travelers will not access NBS Travel System
- Travelers will receive an email when they need to review and certify travel documents
 - Email contains a link to directly access travel documents online
- Travelers will review and sign all documents online

- **Domestic, Local, and Foreign Travel**
 - Travel Authorization
 - Traveler will not need to review or sign any travel documents prior to trip
 - Travel Voucher
 - Traveler will review and certify travel voucher online prior to its approval
 - Will either approve voucher or return it to Travel Planner for modification

- **Sponsored Travel**
 - Travel Authorization
 - Traveler will review and certify the “NIH 1500-8 Form Checklist for Sponsor” online prior to its approval.
 - Will either approve 1500-8 or return it to Travel Planner for modification
 - Travel Voucher
 - Traveler will review and certify HHS-348 and travel voucher online prior to its approval
 - Will either approve voucher or return it to Travel Planner for modification

Demonstration

Follow along in job aid: “Traveler Review and Certification of Travel Documents”

- **My Travel Documents – Travelers may add this gadget to their portal page**
 - Allows Traveler to view and manage travel documents electronically
 - Useful for frequent travelers
 - Lists all of the Traveler’s trips – planned and taken
 - Awaiting Action Section – lists documents awaiting the Traveler’s action
 - Read Only Documents – lists documents that the Traveler may view but not edit. These are under review by another individual or have already been approved. (Can control the number to display in this section and can scroll to see more documents.)

My Travel Documents				
Following documents are awaiting your action:				
Document		Departure	Status	
Local Voucher	TR003715	03/12/2003	PREPARED	Sign
Read Only Documents:				
Document		Departure	Status	
Authorization	TR003722	01/15/2003	APPROVED	View
Voucher	TR003722V1	01/15/2003	APPROVED	View
Local Voucher	TR003724	03/19/2003	APPROVED	View
Authorization	TR003725	05/04/2003	APPROVED	View
Voucher	TR003725V1	05/04/2003	CERTIFIED	View
See all trips...				

Role ... Approver

- Approvers will receive email notification when a document is awaiting approval
 - Email contains link to directly access NIH Portal from which the Approver launches NBS Travel System
- Approver level requirements vary by travel type
 - 1st Level Approver – Domestic, Foreign, & Sponsored
 - 2nd Level Approver – Foreign and Sponsored only
 - Check with your IC for delegated approval authorities
- Review & Approve Travel Document
 - Use Route & Review function to approve documents for NIH-Affiliated Travelers
 - Use Open Existing Document function to approve documents for Non NIH-Affiliated Travelers

Adding Travelers to NBS Travel System

NIH-Affiliated Travelers

NIH Employees, Fellows, Consultants,
Advisory Committee Members, and Contractors

- The NIH Enterprise Directory (NED) and Human Resource Data Base (HRDB) systems automatically transfer new Traveler data to the NBS.
- The Organization Administrator (Org Admin) completes the Traveler Profile in the NBS Travel System, as necessary.

Non NIH-Affiliated Travelers

Guest Speakers, Interviewees, and all other travelers without ability to electronically sign documents

- Similar to the EIN Request process used today
- Requests to have Non NIH-Affiliated Travelers added to the system are forwarded to a central point of contact at each IC. When the NBS deploys, this will be an Organization Administrator (Org Admin) at the IC.
- The Org Admin completes an online Oracle form and forwards it to OFM
- OFM reviews the form
- Email notification of approval or rejection is sent to the requestor
- Upon approval, the Traveler is added to the vendor database in Oracle and to the NBS Travel System database.
- The Org Admin then completes the Traveler Profile in the NBS Travel System.

NBS Travel System “Cut-Over” Plan

How will travel be handled as NIH transitions from ADB to NBS?

- NBS Travel System goes live September 1, 2003
- Do not enter any FY 2004 travel until NBS Travel System goes live
- ADB and NBS controls prevent entry outside the following guidelines:

A

- Enter all travel taking place in FY 2003, including travel with a departure date in FY 2003 and a return date in FY 2004

D

- Will not allow FY 2004 travel to be entered

B

- Available until September 30, 2003 for processing new FY 2003 trips
- Available after September 30, 2003 to close out FY 2003 trips

N

- NBS Travel System available on September 1, 2003

B

- Enter all travel that begins on or after October 1, 2003 (FY 2004)

S

- Will not allow FY 2003 data to be entered

- **NBS Travel Web links available 24/7**
 - **Travel Refresher Training:** http://nbs.nih.gov/Travel_Refresh_Training.html
 - **Travel Guides and Updates:** <http://nbs.nih.gov/training.html#Travel>
 - **Travel On-line Help and References:** <http://nbstraining.cit.nih.gov/travelhelp>
 - **Questions/Answers from Travel Classes:** <http://nbs.nih.gov/TravelPLQs.html>

- **NBS Travel Support**
 - **Contact your IC's Help Point of Contact (HPOC) for assistance:**
<http://nbs.nih.gov/pdf/HPOC.pdf>

- **nVision**
 - **nVision is an evolution of the NIH Data Warehouse. It is the new reporting system designed to work in concert with the NBS. nVision is a business intelligence system that delivers NIH-defined standard reports and facilitates the development of user-created ad hoc reports to support decision-making and analysis. The first NBS module to be supported by nVision is Travel.**
 - **E-mail: Send e-mail to nVisionSupport@nih.gov**
 - **Web Site for information: <http://nvision.nih.gov>**

4 Important Things to Remember about the NBS Travel System – REVIEW

1. Accounting Code Information
2. Other Authorizations
3. Email Notification
4. Final Voucher Checkbox



Wrap-Up

- September 1, 2003 – NBS Travel System Go-Live
- Sign up today for Refresher Training Workshops
- Complete weekly Tuesday Travel Tips training
- Post-Town Hall Workshop until 12:30 p.m./4:30 p.m.
 - NIH Portal – Computers available outside
 - Test your NIH Portal Log-in
 - Subscribe to the Travel Users Community
- A copy of the Town Hall Presentation and handouts are available on the NBS Refresher Training website:
http://nbs.nih.gov/Travel_Refresh_Training.html
- The June 25, 2003 Town Hall presentation is available at <http://videocast.nih.gov>
- Your feedback is important to us! A Town Hall Evaluation will be emailed to you. Please take a minute to complete it when it arrives.

Thank you for coming!!!