

# **Upgrade to ESE Off-Site Working Procedures**

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## **Upgrade Objectives:**

- **Implement new ESE system of recording *all offsite* college work**
  - Fieldwork
  - Hosted Laboratory
  - Conferences
  
- **Minimise bothersome form/questionnaire filling by travellers**
  
- **Obtain Insurance Cover**

**Summary:** Combine into one process all necessary ESE Offsite and H&S procedures in such a way that will also satisfy traveller data needs of the Finance department re. Insurance.

*(This is not about data gathering for metrics!)*

# General OSW website Specification

## To Satisfy:

### 1. ESE staff and students - welfare

record keeping/approvals when needed,  
practical to use forms:

*FW1, Hosted1, Offsite Contact Record (e.g. Conferences)*

### 2. HOD 'at-a-glance' in regional emergency/crisis

know approximately staff whereabouts

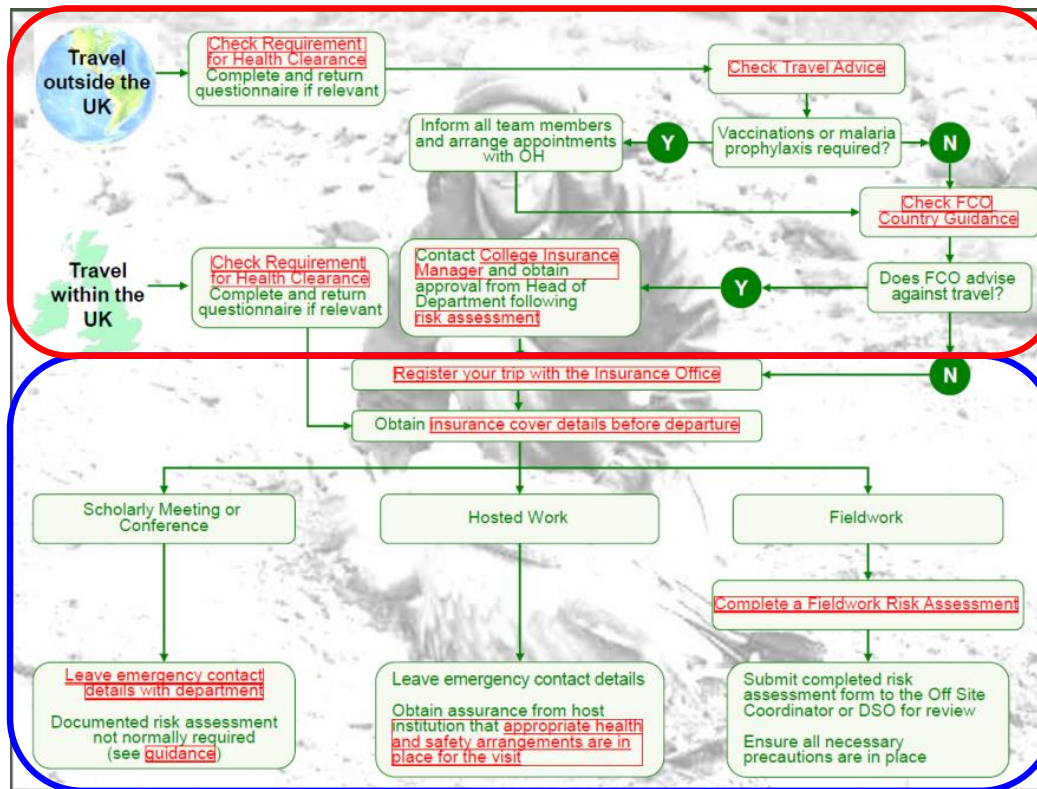
+ further opening of attached files, more detailed info of traveller whereabouts can be found in the specifically attached forms of that traveller

### 3. IC Safety Dept. (Offsite procedures)

### 4. IC Finance Dept. (Insurance)

# Current: College-wide process → replaced in ESE

## Imperial Safety Department's Interactive Travel FlowChart



See new Step 1

New ESE  
SharePoint  
Process

To Streamline  
Management of  
this part

- **Current** Traveller Questionnaire (Qualtrix software).
  - This will no longer be required in ESE –
- Thank you Insurance Manager - Lesley Bravery (Finance Dept)!

# Where to find OSW website & Fieldwork ?

no obvious signpost?

Internal Web Dropdown Menu – Current Students and Staff

The screenshot shows the Imperial College London website. The main navigation bar includes 'Study', 'Research & Innovation', 'Be Inspired', and 'About'. Below this, the 'Department of Earth Science and Engineering' section features a dropdown menu with the following items: 'About the Department', 'Prospective students', 'Research', 'People', 'Current students and staff', and 'MORE'. The 'Current students and staff' item is circled in red. Below the menu, there is a 'Welcome to the Department of Earth Science and Engineering' message, a bathymetric map of the English Channel floor, and a diagram of a lemniscate with the equation  $r = L \cos(k\theta)$  and the area formula  $k = \pi L^2 / 4A$ . The 'If planning to travel offsite on college business' link is also circled in red.

What to do next ? - can be found [here](#) – Link to OSW

# OSW – share point site

The screenshot shows a web browser window with the URL <https://share.imperial.ac.uk/foe/ESE/OSW/OSW%20Pages/OSWOV.aspx>. The page is titled "Earth Science and Engineering Group Trips" and is part of the Imperial College London website. The navigation menu includes "Faculty of Engineering", "Chemical Engineering", "Civil Engineering", "DoC", "Earth Science & Engineering", "Electrical Engineering", and "Materials".

## Earth Science and Engineering Group Trips

**Site Purpose:**

This site is a 'one stop shop' for travellers going on college business. The objectives are to:

- Implement an improved ESE system of recording all off-site college work in accordance with Imperial's Safety Department

For:

- Fieldwork
- Hosted Laboratory Work
- Conference Visits

- Minimise bothersome form/questionnaire filling by travellers
- Combine into one process all necessary ESE Off-site procedures in such a way that it also satisfies the traveller data needs of the Finance department for insurance cover purposes. The data you provide is automatically accessible and used by Lesley Bravery (Finance Department) to provide your Imperial travel and health insurance cover. You should download and print off your insurance certificate before travel.
- Satisfy our HOD's needs - that in the event of a sudden overseas regional crisis with increased risk e.g. Earthquake, Flood, Tsunami, virus outbreak, political/social unrest; the HOD could, at a glance, know approximately where her/his staff on college business are likely to be at the time.

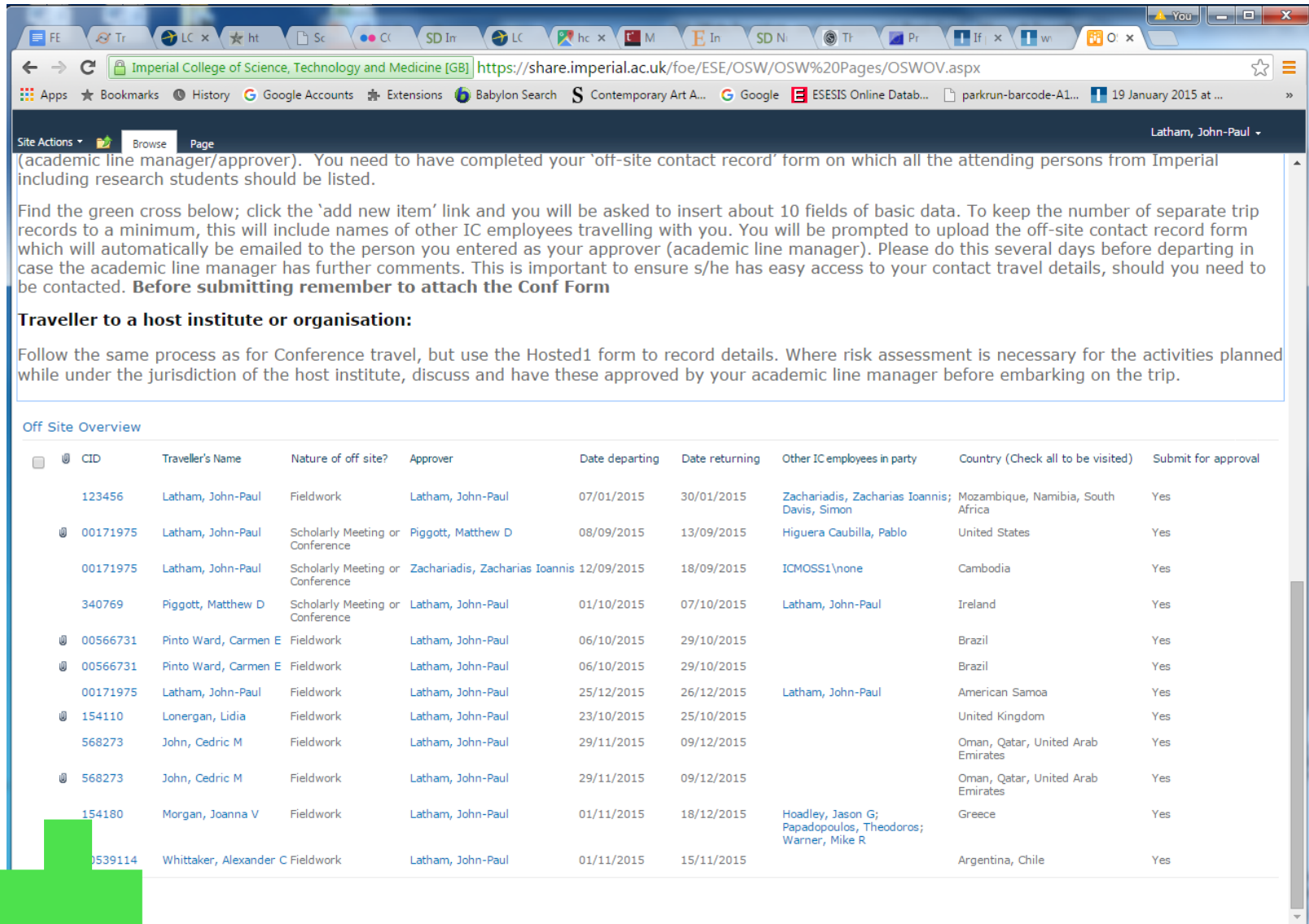
**User Instructions:**

1. The User/Traveller completes a new traveller record by scrolling down to the green cross and clicking the 'Add new item' link
2. The User/Traveller has to input the appropriate 'Approver' depending on the nature of offsite work
3. There is no prompt for uploading an attachment (the User is responsible for iterating with the Approver the relevant form, i.e., FW1 etc. prior to attaching it)
4. When completed, press the Check Button for submission. This signs off the entry and sends a notification e-mail to the Approver

**Traveller on Fieldtrip:**

The traveller entering data on this site must be the trip leader. The trip leader should be the Principal Investigator or the Person In Charge, as referred to on the FW1 form. You must have already completed the FW1 approval process by exchange of emails with the FSO (J-P Latham) and have your approved FW1 form ending in ...\_JPL ready for attaching.

Find the green cross below; click the 'add new item' link and you will be asked to insert about 10 fields of basic data. To keep the number of separate trip records to a minimum, this will include names of other IC employees travelling with you. Thankfully, the information needed does not include any secondary



Imperial College of Science, Technology and Medicine [GB] <https://share.imperial.ac.uk/foe/ESE/OSW/OSW%20Pages/OSWVOV.aspx>

Site Actions ▼ Browse Page Latham, John-Paul


(academic line manager/approver). You need to have completed your 'off-site contact record' form on which all the attending persons from Imperial including research students should be listed.

Find the green cross below; click the 'add new item' link and you will be asked to insert about 10 fields of basic data. To keep the number of separate trip records to a minimum, this will include names of other IC employees travelling with you. You will be prompted to upload the off-site contact record form which will automatically be emailed to the person you entered as your approver (academic line manager). Please do this several days before departing in case the academic line manager has further comments. This is important to ensure s/he has easy access to your contact travel details, should you need to be contacted. **Before submitting remember to attach the Conf Form**

**Traveller to a host institute or organisation:**

Follow the same process as for Conference travel, but use the Hosted1 form to record details. Where risk assessment is necessary for the activities planned while under the jurisdiction of the host institute, discuss and have these approved by your academic line manager before embarking on the trip.

Off Site Overview

<input type="checkbox"/>	 CID	Traveller's Name	Nature of off site?	Approver	Date departing	Date returning	Other IC employees in party	Country (Check all to be visited)	Submit for approval
<input type="checkbox"/>	123456	Latham, John-Paul	Fieldwork	Latham, John-Paul	07/01/2015	30/01/2015	Zachariadis, Zacharias Ioannis; Davis, Simon	Mozambique, Namibia, South Africa	Yes
<input checked="" type="checkbox"/>	00171975	Latham, John-Paul	Scholarly Meeting or Conference	Piggott, Matthew D	08/09/2015	13/09/2015	Higuera Caubilla, Pablo	United States	Yes
<input type="checkbox"/>	00171975	Latham, John-Paul	Scholarly Meeting or Conference	Zachariadis, Zacharias Ioannis	12/09/2015	18/09/2015	ICMOSS1\none	Cambodia	Yes
<input type="checkbox"/>	340769	Piggott, Matthew D	Scholarly Meeting or Conference	Latham, John-Paul	01/10/2015	07/10/2015	Latham, John-Paul	Ireland	Yes
<input checked="" type="checkbox"/>	00566731	Pinto Ward, Carmen E	Fieldwork	Latham, John-Paul	06/10/2015	29/10/2015		Brazil	Yes
<input checked="" type="checkbox"/>	00566731	Pinto Ward, Carmen E	Fieldwork	Latham, John-Paul	06/10/2015	29/10/2015		Brazil	Yes
<input type="checkbox"/>	00171975	Latham, John-Paul	Fieldwork	Latham, John-Paul	25/12/2015	26/12/2015	Latham, John-Paul	American Samoa	Yes
<input checked="" type="checkbox"/>	154110	Loneragan, Lidia	Fieldwork	Latham, John-Paul	23/10/2015	25/10/2015		United Kingdom	Yes
<input type="checkbox"/>	568273	John, Cedric M	Fieldwork	Latham, John-Paul	29/11/2015	09/12/2015		Oman, Qatar, United Arab Emirates	Yes
<input checked="" type="checkbox"/>	568273	John, Cedric M	Fieldwork	Latham, John-Paul	29/11/2015	09/12/2015		Oman, Qatar, United Arab Emirates	Yes
<input type="checkbox"/>	154180	Morgan, Joanna V	Fieldwork	Latham, John-Paul	01/11/2015	18/12/2015	Hoadley, Jason G; Papadopoulos, Theodoros; Warner, Mike R	Greece	Yes
<input type="checkbox"/>	0539114	Whittaker, Alexander C	Fieldwork	Latham, John-Paul	01/11/2015	15/11/2015		Argentina, Chile	Yes

# OSW Key Features

USER/TRAVELLER = ESE Staff or PhD

- ✓ The user/traveller first prepares their appropriate form (FW1, Hosted1, Conf = Offsite Contact Record) in consultation with PI and obtains their approval.
- ✓ If it is a group travel activity, a Group Leader (GL) should coordinate all traveller details to be entered under one form and one data entry process (especially important for fieldwork that the fieldtrip leader organises this)
- ✓ GL/User logs on to OSW Sharepoint site and completes new Sharepoint travel questionnaire, - automatically info goes to the insurance database, but you will also be guided to take your travel insurance certificate
- ✓ GL/User, after completing sharepoint data entry, attaches approved relevant form before submitting. “For Info Only” notification is automatically emailed to DSO (if Hosted1) or FO (if FW1) or PhD supervisor (if PhD on Conference).
- ✓ HoD (& PA) automatically receives notification of each travel submission
- ✓ HoD and DUGS (only) have ‘at-a-glance’ access to staff (+ students) whereabouts

# Live Date: 21<sup>st</sup> Jan 2016 – Feedback welcome

## ✓ Watch This Space

- Safety Department (Lead: Ian Hackford) – Current Review
- Note new FW1 forms
- Expect “High Risk” Destination Registers
- Note Emergency Response Plan (ESP) – as FW1 Appendix
- No guarantee to marry or autofeed/link ESE Sharepoint to Qualtrix Traveller Insurance Database, (Finance Dept)
- Recommended also: AIG Insurance Travel Info

<https://travelguard.secure.force.com/TravelAssistance/TGPreLoginHomePage?PL=AIG%20UK>

## ✓ Help- see JPL/Zac

- Rob Lowther → will enter OSW details for Trip Leaders of UG Taught Fieldwork Classes
- this powerpoint presentation will be online