Government of Canada / Gouvernement du Canada

Travel AcXess Voyage

Public Works & Government Services Canada
Shared Travel Services Initiative

Release 1.0A (Portal and OBT) Implementation Playbook

Travel AcXess Voyage

November 3, 2004

1.0   Introduction

A successful implementation of the Travel AcXess Voyage solution will require a significant amount of coordination as well as the involvement of multiple stakeholders within participating Government of Canada (GoC) departments and agencies. In order to support the transition and to coordinate the launch, a comprehensive Implementation Playbook has been developed.

The purpose of the Implementation Playbook is to provide participating departments and agencies with a description of the implementation tasks and activities involved in the launch of the Travel AcXess Voyage portal and On-line Booking Tool (OBT) – the main components of Release 1.0A. The 1.0A Implementation Playbook aims to proactively inform departments and agencies of implementation tasks and activities thus enabling them to plan accordingly.

1.1   Structure

The Release 1.0A Implementation Playbook is divided into two sections:

1. **Introduction**
   The introduction section of the Playbook (current section) provides an overview of the Release 1.0A solution.

2. **Implementation Activities**
   Each Release 1.0A implementation activity has several tasks associated with it. The activities sections of the Playbook are divided into the following sub-sections:
   Overview – Introduces the activity and describes the purpose and context as it relates to 1.0A implementation
   Key Players – Identifies the audience for the activity
   Tasks – Checklist and instructions for the key implementation tasks
   Support and Tools – List of tools designed to support the completion of 1.0A implementation tasks

1.2   Project Overview

The Shared Travel Services Initiative (STSI) is a government-wide, shared service project embracing all facets of travel for the Government of Canada, including travel agency services, a charge card for travel, electronic travel reservations, expense reporting and analysis, and settlement to back-end systems. This initiative will impact over 100 Canadian federal government departments and agencies and over 90,000 public servants. The core stated objectives of the project are to ensure that government travellers are better-served, supported, and become increasingly reliant on self-service electronic travel and expense management services.

1.2.1   Overall Release Plan

The Travel Acxess Voyage solution will be implemented in four main releases. A release refers to the introduction of a new service or level of functionality. The table below outlines the Travel AcXess Voyage release plan.

Release 1.0 (Launched April 1/04)	DTC, DRCTC Full Service Travel Agency
Release 1.0A	Travel AcXess Voyage Portal On-line Booking Tool (OBT)
Release 2.0	Expense management tool Financial data feed (Travel Expense)
Release 3.0	Expense management tool enhancements Financial data feed (Travel Commit) Chart of Accounts synchronization Public/supplier view of portal Travel integration
Release 4.0	Expense management tool enhancements

Collectively, these services will be known as Travel AcXess Voyage. The Shared Travel Service Initiative project team will oversee the STSI as well as the implementation of Travel AcXess Voyage services delivered by the contractor, Accenture, and its team of sub-contractors American Express, Bell Canada and Concur Technologies.

1.3   Release 1.0A Solution

Release 1.0A introduces the first of the on-line components associated with the Travel AcXess Voyage solution. Figure 1.0 depicts the various elements of the Release 1.0A solution.

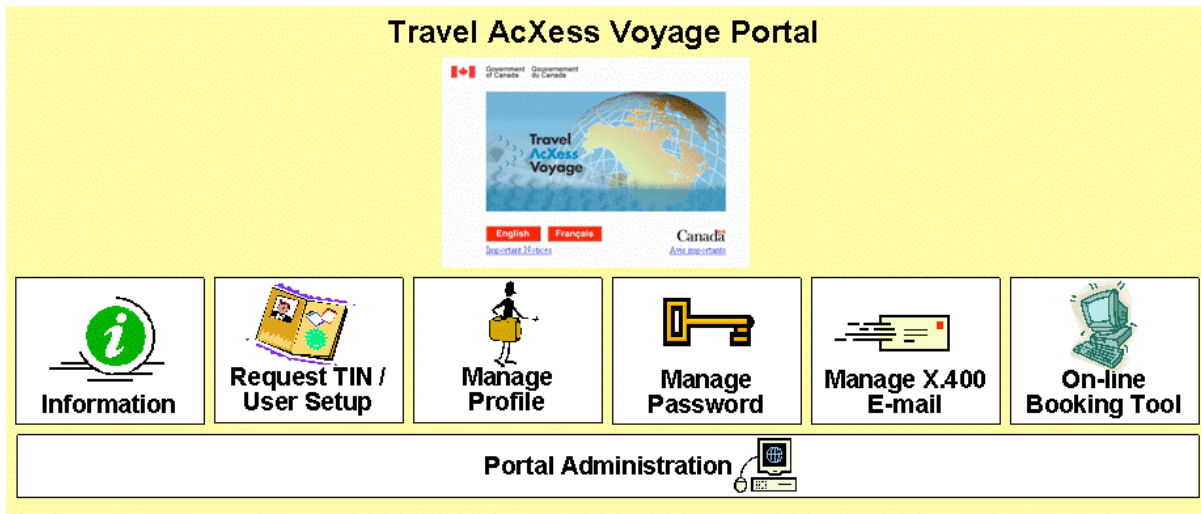**Figure 1.0:** Release 1.0A Solution

Release 1.0A introduces the Travel AcXess Voyage portal. The portal serves as the gateway through which users will access travel-related information, services and tools. Travel-related information is available to all users through the portal, however, secure travel services and tools (e.g., Traveller Profile, OBT) are accessible only to those users who log on to the portal

using their Traveller Identification Number (TIN). The various elements are summarized below.

Information: Travel-related information housed within the portal includes GoC travel policies, FAQs, forms, training/learning material, feedback forms, card and agency overview.

Request TIN/User Setup: All users of the portal will require a TIN and with the introduction of Release 1.0A, users will have the option to complete the TIN registration process on-line. Once users have a TIN, they will log on to the portal and complete user setup activities.

Manage Profile: The traveller profile contains departmental, travel-related and personal information about each user. The on-line profile will allow travellers and travel arrangers to maintain their profile through the portal.

Manage Password: To access the secure services and tools on the portal, users will require a TIN and a password. Users can change their portal password on-line at any time.

Manage X.400 E-mail: In order to receive electronic travel documents and Travel AcXess Voyage system generated e-mails, users must have an X.400 e-mail address attached to their traveller profile. Users will have the ability to add, change or delete their X.400 address as required.

On-line Booking Tool: With the introduction of Release 1.0A, users will have access to plan and book travel using the On-line Booking Tool (OBT). To complete a booking, users will require a TIN and a Travel Authorization Number (TAN).

Portal Administration: Each department/agency will be responsible for maintaining certain portal settings and user properties within the Release 1.0A solution.

In summary, the Release 1.0A solution will support travellers and travel arrangers and will streamline travel management within the GoC.

2.0   Pre-Implementation Activities

This section describes the activities that need to be completed by departments/agencies prior to the launch of Release 1.0A.

2.1 Portal Administration

Overview

The purpose of this section is to explain the implementation activities associated with portal administration. Portal administration refers to the process by which each department/agency manages administration tasks within the Travel AcXess Voyage portal. Each user has a traveller profile which contains their departmental, travel-related and personal information. In addition to this, each user has a set of portal user properties which must be maintained by a Departmental Administrator. As depicted in the figure below, the Departmental Administrator is responsible for managing the following portal user properties:

> Portal User Roles
> TIN Status
> Policies/procedures
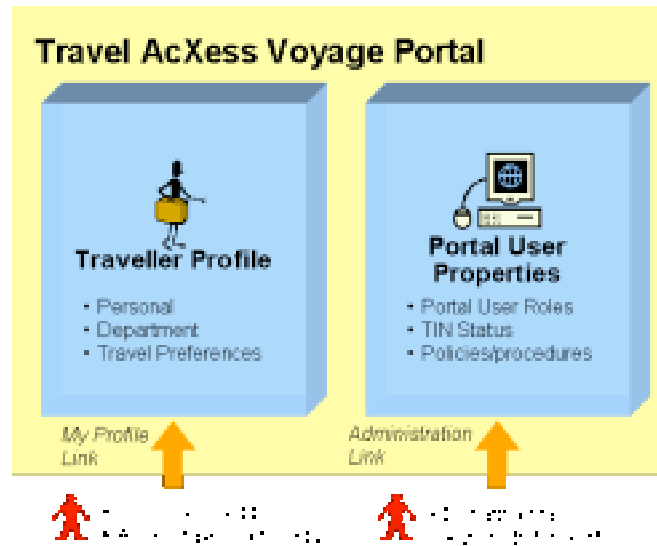
Each of these user properties is described in further detail below.

Portal User Roles
The portal is the gateway to a variety of GoC travel related information and services. A user's access to the information and services within the portal is dependent on the portal user role(s) assigned to them. For example, the "Book Travel" link on the portal home page will only be displayed to users who have the role of "Traveller" stored within their portal user properties. Users can have one or more roles assigned to them – each role assigned to them will grant them access to different pages within the portal. The Release 1.0A portal user roles include:

Portal Role	Definition
Traveller	This role grants access to Travel AcXess Voyage components such as the OBT and traveller profile. The Traveller role is the default role assigned to all portal users who log on with their TIN and therefore does not need to be maintained by the Departmental Administrator.
Travel Arranger	This role grants access to the Travel AcXess Voyage portal to perform travel-related activities on behalf of another user (e.g. update profiles, book travel). Travel arrangers may assign the role of Travel Arranger to themselves by selecting the "I am a Travel Arranger" checkbox in their traveller profile. Since this role can be self-assigned, it does not need to be maintained by the Departmental Administrator.
TAN Holder (National TAN coordinator)	This role grants access to on-line TAN hierarchy forms and should be assigned to the National TAN coordinator in each department/agency. The Departmental Administrator is responsible for assigning this role to designated users.
Card Manager	This role grants access to DRCTC application forms and TAN hierarchy forms (e.g. SFTOs). The Departmental Administrator is responsible for assigning this role to designated users.
Departmental Administrator	This role grants access to maintain the portal properties for users within the administrator's department/agency. The Global Administrator at the Travel AcXess Voyage Technical Support Desk will initially set up one Departmental Administrator per department/agency. Each Departmental Administrator is then responsible for assigning this role to other designated users within their department/agency.

In summary, since the Traveller role is assigned automatically upon first time login and the Travel Arranger role is set up by the Travel Arranger themselves after Go-live, the Departmental Administrator is not required to complete setup of these roles.

The TAN Holder, Card Manager and Departmental Administrator roles are considered "specialized" roles as they will be assigned to a limited number of employees within a department/agency. These "specialized" roles will require administration for Release 1.0A implementation. Further detail about the setup requirements for these roles is outlined in the task section of this chapter.

TIN Status

A user's TIN status controls their access to the Travel AcXess Voyage portal. There are three possible TIN statuses outlined in the table below.

TIN Status	Definition
Active	Users are able to log on to the portal. e.g. All employees using the on-line solution will have an active TIN status.
Inactive	Users cannot log on to the portal however, the information in their traveller profile remains on file. e.g. User takes extended leave of absence and do not need access to the portal.
Delete	Users cannot log on to the portal and the information in their traveller profile is purged from the profile database. e.g. User leaves Government of Canada

Employees converted from the Full Service Travel Agency to the on-line solution will automatically have a TIN status of Active assigned to them. Following Go-live, Departmental Administrators can maintain this property on behalf of the users in their department/agency. Departments/agencies will need to define how they will manage the process of updating TIN status. Further details about this process are outlined in the task #5 of this chapter.

Policy/Procedure

Departmental Administrators can add specific departmental travel/expense policy or procedure links to the portal. For example, if a department/agency has information regarding travel and expense management on their departmental intranet site, the URL link to this site can be added to the portal. Any link added will only be displayed to users in the Administrator's department/agency.

In preparation for go-live, departments/agencies must establish resources and processes for managing the administrative tasks listed above.

Please note that end users should contact the Travel AcXess Voyage Technical Support Desk for functionality related to unlocking locked users (after three incorrect logon attempts) and resetting passwords.

Key Players

SFTO and departmental contacts

Departmental Administrator(s)

*Check
when
complete*

Tasks

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1. **Identify departmental users that require "specialized" portal user roles**

   As described in the overview section above, there are three "specialized" portal user roles that require manual set up for Release 1.0A implementation. Review and understand the role descriptions above prior to proceeding with this task.

   1.1 Identify your Departmental Administrator(s)
   - The Departmental Administrator role is mandatory. Departments/agencies should identify a minimum of 1 Departmental Administrator as well as 1 backup Administrator.
   - When determining which resources to assign the Departmental Administrator role to, consider the following:
     - IT/Finance background?
     - Centralized or decentralized role?
     - Number of administrators?
   - The user(s) selected will need to assume some additional administration responsibilities in the future once the expense management tool is implemented.
   - Create a list of the employees to be assigned this role – the list should include the employee's name, business telephone, and TIN (if available). This list will be required to complete the post-implementation portal administration tasks described in task #2, section 3.1 of the Playbook.
   - If your department/agency has identified more than one Departmental Administrator, select **ONE** primary Administrator. This primary Administrator will be set up in the on-line solution by the Travel AcXess Voyage Technical Support Desk and will subsequently be responsible for setting up remaining Departmental Administrators after Go-live.
   - Once the Departmental Administrators are identified, communicate the new role and responsibilities to the selected resources.

   1.2 Identify your TAN Holder(s) (National TAN Coordinator) and Card Manager(s)
   - Determine who in your department/agency should be assigned the TAN Holder and Card Manager roles. As stated in the overview, the TAN Holder role should be assigned to the National TAN Coordinator and the Card Manager role to SFTOs or employees involved in managing the DTC/DRCTC card program.
   - Create a list of the employees to be assigned these roles – the list should include the employee's name, business telephone, and TIN (if available). This list will be required

to complete the post-implementation portal administration tasks described in task #2, section 3.1 of the playbook.

2. **Ensure the primary Departmental Administrator obtains a TIN prior to November 15, 2004**

    The primary Departmental Administrator identified in task #1.1 above will need to complete a traveller profile/obtain a TIN prior to November 15, 2004 so that they may access the on-line solution as of November 24, 2004 and complete the post go-live portal administration tasks outlined in section 3.1 of the Playbook.

    To complete a traveller profile and subsequently obtain a TIN, the primary Departmental Administrator must access the paper profile on the STSI website (http://gtmo.gc.ca) and complete the following business information:

    - o Department name
    - o First Name, Middle Initial, Last Name
    - o Business telephone number
    - o Business fax number
    - o Language preference
    - o X.400 e-mail address (if applicable)

    There are additional fields on the paper profile however the Administrator must **only** complete these key fields.

    Once complete, the Administrator should write "**ATTENTION: DEPARTMENTAL ADMINISTRATOR**" across the top of the paper profile and send it via fax to the Full Service Travel Agency at 1-866-735-4824 as soon as possible.   This fax number is a dedicated fax number for primary Departmental Administrators ONLY. The Departmental Administrator will receive a TIN once their paper profile has been processed.

    It is very important for Departmental Administrators to complete the profile prior to November 15, 2004. If they do not complete this task on time, they will not be converted to the on-line solution and will need to wait until after Go-live to request a TIN, thus delaying departmental portal administration activities.

☐ 3. **Send primary Departmental Administrator information to STSI prior to November 19, 2004**

Once the primary Departmental Administrator receives their TIN, the SFTO must send the following information to STSI:
- o Department/agency name
- o Departmental Administrator TIN, first name, middle initial, last name and business telephone number

Information should be sent via X.400 e-mail to Shannon Watson at STSI (C=CA;ADMD=GOVMT.CANADA;PRMD=GC+PWGSC.TPSGC;O=NCR ;S=Watson;G=Shannon) or via fax to (613) 952-1440 (Attention: Shannon Watson)

STSI requires these names in advance of Go-live so that the Travel AcXess Voyage Technical Support Desk has the information required to set these users up in the on-line solution

☐ 4. **Distribute and review the Portal Administration Detailed User Guide**

A Detailed User Guide outlining the portal administration tasks, activities and functionality will be distributed to SFTOs prior to Go-live.

SFTOs should forward this training material to all Departmental Administrators in their department/agency.

Departmental Administrators should review this material prior to Go-live so that they are prepared to complete administrative activities once the system is live.

This material will also be available on the Learning page of the Travel AcXess Voyage portal after Go-live.

☐ 5. **Develop processes to support departmental portal administration functionality**

The introduction of the portal administration functionality will require the development of several supporting processes within each department/agency. These processes will need to be communicated and launched within the department/agency after go-live.

Departments/agencies are strongly encouraged to identify a process for handling each of the following scenarios:

Scenario	Sample Process
End user needs a new "specialized" role assigned to them or needs a role removed from their user properties	Develop a paper or e-mail form that users can complete if they wish to request changes to their Portal User Roles Form must be approved by the SFTO and submitted to the Departmental Administrator prior to entry into the system

Department/agency wants to add new link to travel policy/ procedure	SFTO must approve new link and content and send e-mail to Departmental Administrator requesting that they update the link
End user TIN status changes	Develop a paper or e-mail form to be completed by management indicating that a user's TIN status requires updating (inactive or delete) Manager contacts Departmental Administrator directly to have user's TIN status updated
End user changes departments/agencies	Users who change departments/agencies will need to update their traveller profile with their new department/agency Once the user changes the department/agency in their profile, the new Departmental Administrator will have access to the user's portal properties. The user's new manager should contact the Departmental Administrator to request that the user's portal roles be validated and/or updated to reflect new access rights.

Departments/agencies that do not develop these processes will have gaps in their operational procedures post Go-live.

6. **Communicate portal administration processes to impacted users**
   Once the processes in task #5 are developed, they need to be communicated to impacted stakeholders within the department/agency.
   Users should also be provided with the contact information for their Departmental Administrator. Employees must understand the roles and responsibilities of the Departmental Administrator so that they can be leveraged effectively.
   Failure to implement and communicate these new processes to impacted stakeholders could lead to end user confusion and frustration.

Tools

Tool	Location
Portal Administration Detailed User Guide	Distributed by e-mail to SFTOs prior to Go-live
	Posted on Portal Learning Page after Go-live

2.2 Technology Readiness

Overview

The Release 1.0A solution is dependent on the following technology capabilities.

Technology Capability	Description	Impact
Connectivity	The Travel AcXess Voyage solution requires access to the GoC intranet via SCNet.	If a department/agency's users do not have access to SCNet, they will not be able to access the on-line capabilities of Travel AcXess Voyage.
Internet Browser	The Travel AcXess Voyage solution requires a browser (Netscape or IE) that has the ability to support https 128 bit encryption.	The portal and OBT components will not run on a browser that does not meet the https 128 bit requirements.
Browser Settings – JavaScript	The Travel AcXess Voyage solution requires JavaScript to be enabled.	JavaScript is required to use the OBT. A department/agency that does not enable JavaScript will only be able to use the portal and profile components of Travel AcXess Voyage.
Department configuration	Port 80 must be configured for http access. Port 443 must be configured for https access.	Without port 80 or 443 being properly configured, a department/agency will not be able to access the on-line components of Travel AcXess Voyage.
X.400 e-mail	The Travel AcXess Voyage solution uses X.400 e-mail to communicate electronically with users (e.g. electronic travel itineraries).	Without X.400 e-mail, users will not receive travel documents electronically after completing a booking through OBT and they will not be able to receive a temporary password through e-mail after a password reset.

Participating departments/agencies must possess these capabilities in order for the Release 1.0A solution to be fully functional.

Key Players

SFTO and departmental contacts

IT contacts

*Check
when
complete*

Tasks

☐

1. **Review and confirm department/agency's technology readiness**

   The Travel AcXess Voyage solution is based on the technology capability requirements outlined in the overview section. The STSI account management team may have previously communicated these requirements with your department/agency.

   Follow up with IT personnel in your department/agency to confirm current level of technology readiness and determine whether updates are required.

   Departments/agencies should review these requirements and if they have further questions/concerns, they should direct them to STSI Departments/agencies may not be able to use certain aspects of the Release 1.0A on-line services if their technology does not meet these requirements.

Tools

Tool	Location
N/A	N/A

2.3 Training

Overview

Release 1.0A introduces the Travel AcXess Voyage portal and On-line Booking Tool (OBT). These components present a new and modern approach for managing travel within the Government of Canada (GoC). To encourage an effective transition to the Release 1.0A services, a training approach will serve to prepare and equip trainers and end users with the necessary skills and knowledge required to use the new tools.

There are two components in the Release 1.0A training program: Train-the-Trainer (TTT) and End User training.
    TTT sessions (English and French) will be facilitated by STSI instructors and will involve portal/OBT training for all participating department and agency training teams. These sessions are scheduled to begin just prior to the Release 1.0A launch.
    End User training will be facilitated by Department and Agency training teams and is targeted at GoC employees who will use the portal and OBT to book their business travel.

The purpose of this section is to outline the pre-implementation tasks associated with implementing the Release 1.0A training program.

Key Players

SFTO and departmental contacts
Departmental Training Contacts

Tasks

Check when complete

☐ 1. **Review 1.0 Training Implementation Handbook**
    The Release 1.0 Training Implementation Handbook was distributed to Department Training Contacts in June 2004
    The Handbook outlines key tasks associated with implementing 1.0A Travel AcXess Voyage training in your department/agency and should be reviewed prior to launching your training program
    Questions/comments should be directed to the STSI training team (Appendix B)

☐ 2. **Participate in Train-the-trainer**
    Department training contacts were contacted by STSI in October 2004 to schedule TTT sessions
    TTT sessions will begin prior to Go-live (mid-November) for some departments/agencies. Participants will be contacted with their session date/time.
    Training materials/assets will be made available to TTT participants in advance of their training session. These materials will reside on the Learning page of the Travel AcXess Voyage portal after Go-live.

☐   **3. Initiate end user training sessions**

>   End user training can commence as soon as department/agency
>   training teams have participated in the TTT sessions
>   Due to the large number of end users to train, it is expected that
>   end user training sessions will continue beyond the go-live date

Tools

| Tool	Location
Training Implementation Handbook	Distributed in June 2004 to departmental training contacts

2.4 Communications and Marketing

Overview

A strategic communications and marketing program will support Release 1.0A activities. This program will include the dissemination of information and products which:

> Include implementation and operational messages which support the launch
> Build awareness of the STSI by engaging employees at all levels and demonstrating the features and benefits of modernized travel services Promote the STSI to all Government of Canada employees as one of the major shared services initiatives
> Help to achieve adoption targets of Travel AcXess Voyage

Effective, proactive and timely communications and marketing activities will help to ensure the successful implementation of Release 1.0A. The following timeline outlines the planned communications and marketing products for Release 1.0A. Please note that these products and timelines are subject to change as additional communication requirements arise.
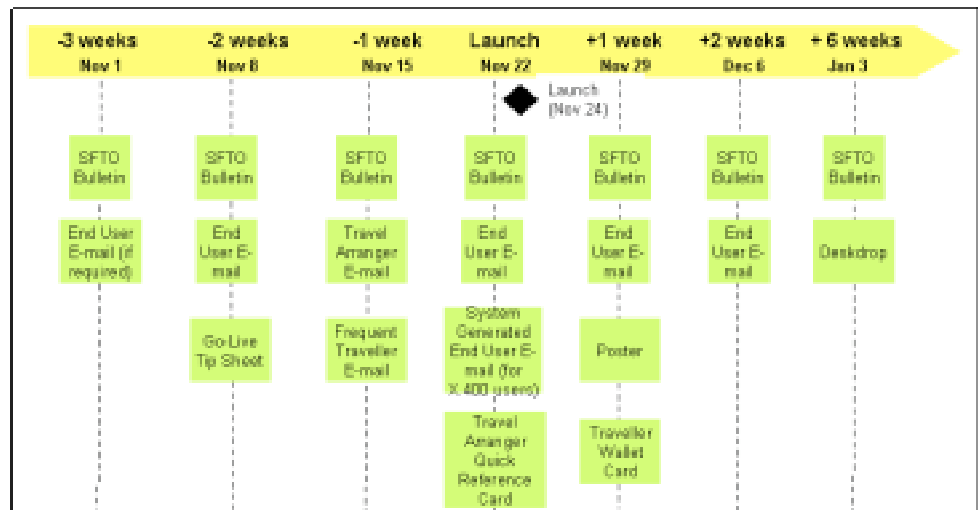
Release 1.0A Communications and Marketing Timeline

Key Players

SFTO and departmental contacts
Departmental Communications Contacts

Tasks

Check when complete

☐ **1. Review Release 1.0A communications and marketing timeline**
> The Release 1.0A communication/marketing timeline included in the overview section outlines the approximate drop-dates for each launch communication/marketing product

☐ **2. Distribute communications and marketing materials to all relevant stakeholders prior to Release 1.0A launch**

SFTOs will receive a number of e-mail messages from STSI that will require forwarding within their department/agency (e.g. frequent travellers, travel arrangers, end users). Timely distribution of these 1.0A launch messages will facilitate the transition period.

Marketing products such as a poster, deskdrop and wallet card will need to be distributed and posted within the various National Capital and Regional offices

A Quick Reference Card which outlines key 1.0A operational items was developed to support Travel Arrangers during the transition period. These should be distributed to the appropriate audiences.

Tools

Tool	Location
Release 1.0A STSI Communications and Marketing Timeline	Overview section
STSI Communications/Marketing products	To be distributed

3.0 Post-Implementation Activities

This section describes the activities that need to be completed by departments/agencies after the launch of Release 1.0A.

3.1 Portal Administration

Overview

This activity is related to the pre-implementation activity called Portal Administration discussed in section 2.1 of the Playbook.

Once the traveller profiles have been converted from the Full Service Travel Agency to the on-line solution, departments/agencies will need to launch their portal administration activities and processes. The detailed tasks associated with post-implementation portal administration are outlined below.

Key Players

SFTOs and departmental contacts

Departmental Administrators

Tasks

Check when complete

☐ 1. **Complete primary Departmental Administrator setup**
As described in task 2 of section 2.1, the primary Departmental Administrator was responsible for obtaining a TIN, completing their profile and submitting the information to STSI. As a result, the primary Departmental Administrator will be "converted" to the on-line solution and set up with the appropriate access rights in the portal by November 24, 2004.
If a primary Departmental Administrator did not obtain a TIN and complete a profile prior to November 15, 2004 they will need to Request a TIN on-line after Go-live, login and complete the new user setup. Once they've completed these steps, the SFTO must forward the department name, TIN, name, business telephone number for their primary Departmental Administrator via X.400 e-mail to Shannon Watson at STSI (C=CA;ADMD=GOVMT.CANADA;PRMD=GC+PWGSC.TPSGC;O=NCR;S=Watson;G=Shannon) or via fax to (613) 952-1440 (Attention: Shannon Watson)
STSI will subsequently pass this information to the Travel AcXess Voyage Technical Support Desk so that the Administrator may be set up.
Since the Departmental Administrator role grants access to restricted administrative areas within the portal, the Travel AcXess Voyage Technical Support Desk requires authorization from the SFTO prior to assigning the Administrator role.

☐ **2. Complete "specialized" portal user role setup**

In order for "specialized" users to get the appropriate access to the system, the primary Departmental Administrator will need to update their portal user roles accordingly. The primary Departmental Administrator can begin this task once they have obtained their TIN and been setup by the Travel AcXess Voyage Technical Support Desk. For Administrators who obtained a TIN prior to Go-live through the paper profile process, they will have access to begin setting up "specialized" portal users on November 24, 2004. Departmental Administrators who request a TIN on-line after Go-live will not have access until the Travel AcXess Voyage Technical Support Desk receives authorization from the SFTO and STSI.

The additional "specialized" roles that will need to be set-up by the primary Departmental Administrator after go-live include:
- o Departmental Administrator (remaining non-primary Administrators)
- o TAN Holder (National TAN Coordinator)
- o Card Manager

Please note that all users requiring "specialized" roles must obtain a TIN prior to the primary Departmental Administrator assigning them a "specialized" role. If "specialized" users do not have a TIN, they should request one on-line following Go-live.

Task #1 in section 2.1 of the Playbook involved creating a list of "specialized" users (employee's name, business telephone, and TIN). This list should be submitted to the primary Departmental Administrator so that the "specialized" roles can be assigned to the appropriate users.

The Departmental Administrator should refer to the Portal Administration Detailed User Guide to support them during these setup activities.

☐ **3. Implement departmental portal administration processes defined in section 2.1 of the Playbook (task #5)**

The pre-implementation section titled Portal Administration involved defining ongoing departmental administration processes (task #5, section 2.1)

Departments/agencies will need to implement and assess the effectiveness of these processes after go-live

☐ **4. Update portal with department/agency specific travel policy and/or procedure links**

The portal component of the Travel AcXess Voyage solution has the capability to provide a link to a department/agency's local travel policies or procedures. Departments/agencies may want to update

the portal to include this link so that users have easy access to these policies as they complete their travel bookings. The Departmental Administrator can refer to the Portal Administration Detailed User Guide for instructions on inserting the link to the department/agency travel policies.

Tools

Tool	Location
Portal Administration Detailed User Guide	Distributed by e-mail prior to Go-live Posted on Portal Learning Page after Go-live

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Travel AcXess Voyage

3.2 Profile Updates

Overview

During the implementation of the Release 1.0A solution, the data stored in the traveller profiles will be transitioned from the Full Service Travel Agency system to the new on-line solution. The transition will only include business information.

Business information in the traveller profiles that will be converted to the on-line solution include:

Traveller Identification Number (TIN)
First name
Last name
Middle Initial
Business telephone number with area code
Business fax number
Language preference*
X.400 e-mail address

*If the user did not complete the language preference field on their paper profile, the language will default to English until it is updated.

The remaining fields on the traveller profile will not be carried over in conversion. As a result, travellers/travel arrangers will be required to update their profiles after go-live. This section of the playbook is designed to provide SFTOs and departmental contacts with an overview of the activities that each end user will need to complete after Go-live. The operational information contained in this section will be included in e-mails distributed to users prior to implementation.

Key Players

All Travel AcXess Voyage on-line users

Check when complete

Tasks

☐

1. **Obtain temporary password and complete new user setup**
   Users who have X.400 e-mail stored on their profile will automatically receive an e-mail with a temporary password for the Travel AcXess Voyage portal once their profile information is converted. X.400 users will receive these e-mails in the days leading up to Go-live but will not be able to access the Travel AcXess Voyage site until November 24, 2004. Obtaining this temporary password via e-mail allows users to begin using the new on-line tools as of November 24, 2004.
   Users who do not have X.400 e-mail stored on their profile will need to call the Travel AcXess Voyage Technical Support Desk at 1-800-514-3798 (Option 4) after November 24, 2004 to obtain their temporary password. In order to facilitate the distribution of temporary passwords after Go-live, non-X.400 users who do not

have an urgent need to travel the week of November 24, 2004 should delay their call to the Travel AcXess Voyage Technical Support Desk. On the other hand, STSI would like to encourage non-X.400 SFTOs, travel arrangers, frequent travellers, trainers, departmental administrators and VIPs to contact the Technical Support Desk during the first 1-2 weeks after launch so that they may obtain their temporary password and begin using the new on-line tools.

Once the temporary password is obtained, users must access the portal and log in using their TIN and temporary password.

All new users will be prompted to complete a new user setup process the first time they log in to the portal. The new user setup process involves the following steps:

- o Change temporary password
- o Accept privacy statement
- o Create profile
- o Confirmation

Further communications regarding the temporary password process will be distributed to SFTOs closer to launch and should be distributed to impacted users

☐ **2. Update non-mandatory (non-business) fields on traveller profile and complete Travel Arranger setup**

After each user has completed the new user setup process, they will have access to the Travel AcXess Voyage on-line services, including their on-line profile. Travel arrangers and travellers will need to access their on-line traveller profile to update the non-mandatory fields (e.g. travel preferences, membership programs). Non-mandatory fields also include travel arrangers and travellers set up.

2.1 Travel Arrangers Setup

In order for a travel arranger to be added to a traveller's profile (which allows them to complete activities on-line on the travellers behalf), travel arrangers must first identify themselves as such within their own traveller profile.

To do this, travel arrangers must access their profile and select the checkbox titled "I am a travel arranger".

2.2 Travellers Setup

Once travel arrangers have set themselves up in their own profile, travellers need to add the appropriate arranger to their profile.

To do this, travellers must access their traveller profile and search for the appropriate travel arranger(s) to add. There is a maximum of two travel arrangers per traveller profile. The travel arranger's name will only be displayed to the traveller if they have completed task 2.1 (above).

The traveller must select the appropriate travel arranger from the search results and set the travel arrangers' level of access. There are two levels of access available: Grant access to make profile changes

and travel bookings, or, deny access to make profile changes but allow travel bookings.

Once setup is complete, the travel arranger has the ability to complete profile updates and/or travel bookings on behalf of the traveller.

☐ **3. Validate/update X.400 e-mail**

In order for users to receive travel documentation electronically (e-tickets) they must be an X.400 e-mail user.

Since the launch of the Full Service Travel Agency, traveller information has been matched with a Government of Canada e-mail database in an attempt to add X.400 e-mails addresses to traveller profiles. Unfortunately, this matching process has not been able to update all profiles for users of X.400. When the on-line solution is launched, users will be able to attach their X.400 e-mail address directly to their traveller profile through the portal.

If the user has an X.400 e-mail address mapped to their profile, the user should confirm that it is correct. If it is incorrect or, if there is no X.400 e-mail address displayed, the user can add/change/delete the X.400 address using the X.400 tool in the portal.

The benefits of having an X.400 mapped to the traveller profile become increasingly more important with future releases of the solution.

Tools

Tool	Location
N/A	N/A

3.3 Training

Overview

As described in the pre-implementation section of this document, there are two components in the Release 1.0A training program: Train-the-Trainer (TTT) and End User training. Both TTT and End User training sessions will continue to be conducted post Go-live.

The purpose of this section is to describe the training activities that should be completed after the launch of the solution.

Key Players

SFTOs and departmental contacts

Department Training Contacts

Check when complete

Tasks

☐ 1. **Review Learning page of Travel AcXess Voyage portal**
   All Travel AcXess Voyage training material will be posted on the Learning page of the portal. Department training contacts and trainers are encouraged to familiarize themselves with the content on these pages and direct end users to the materials within Learning page.

☐ 2. **Complete TTT feedback forms**
   Once the portal is live, employees who attended TTT sessions are asked to access the Learning pages of the portal and complete a training feedback form. This feedback will allow the STSI to improve training for the next release.

☐ 3. **Continue to participate in TTT sessions as scheduled by STSI**
   Some departments TTT sessions may be scheduled to occur after the initial launch of the Release 1.0A technology.

☐ 4. **Continue to conduct End User training**
   Using the material available on the Learning pages of the portal, continue to implement training with the end users within your department/agency.

Tools

Tool	Location
TTT Feedback Forms	Portal learning page

3.4 Post-implementation Support

Overview

Once the solution is live within a department/agency, users will need to know where they can turn for help in using and navigating the solution. If users do not have a good understanding of what tools and services are available to support them, they may become frustrated with the new solution and select not to use it.

Key Players

SFTOs and departmental contacts

Check when complete

Tasks

☐ 1. **Communicate the role of the Travel AcXess Voyage Technical Support Desk to users**
    The Travel AcXess Voyage Technical Support Desk is the main vehicle for issue escalation and resolution both during the implementation of the new solution and during future releases. Departments/agencies need to make their employees aware of the Travel AcXess Voyage Technical Support Desk and its role.
    The Travel AcXess Voyage Technical Support Desk will handle issues related to connectivity, temporary password issuance to non X.400 users, password resets, locked user accounts, system bugs and navigational questions.
    Users with navigational questions are encouraged to consult the Learning page of the portal for the latest training materials or the on-line help functionality within each of the tools prior to contacting the Technical Support Desk. Navigational issues can often be resolved by referencing the supporting training and help documentation.
    The Travel AcXess Voyage Technical Support Desk can be reached at 1-800-514-3798 (Option 4)

☐ 2. **Participate in the post-implementation support conference call**
    The STSI will be facilitating a conference call during the week of go-live which is intended to provide SFTOs and departmental contacts with an opportunity to raise issues for attention, discuss post-implementation activities and review operational procedures. This conference call does not replace the role of the Technical Support Desk.
    Logistics for this conference call will be distributed at a later date

Tools

Tool	Location
N/A	N/A

Appendix A: Glossary

Term	Definition
Departmental Administrator	A Departmental Administrator is responsible for managing portal administration tasks (e.g. portal user properties) on behalf of the users in their department/agency.
OBT	The On-line Booking Tool (OBT) gives travellers and travel arrangers the ability to plan and book simple travel (air, rail, car and hotel) on-line.
Portal	The gateway through which Government of Canada (GoC) employees can access travel-related information, tools and services such as GoC travel policies, travel information and advisories, facts about the Card and Full Service Travel Agency, forms (DTC application form, electronic/fax reservation form, etc…), Frequently Asked Questions, training/learning materials, feedback forms.
Portal User Properties	In addition to the traveller profile each user has a set of portal user properties which are maintained by a Departmental Administrator. The portal user properties include user roles, TIN status, reset password, unlock user, policies/procedures.
Release	A release refers to the introduction of a new level of system functionality. For example, Travel AcXess Voyage Release 1.0A introduces the portal and OBT while Release 2.0 introduces the next level of functionality, the expense management tool.
ScNet	The Government of Canada secure network. The Travel AcXess Voyage solution is only accessible from within ScNet.
TAN	A Travel Authorization Number (TAN) is required in order to book travel (air, hotel, car, rail) through the On-line Booking Tool or Full Service Travel Agency.
TIN	A Traveller Identification Number (TIN) is a randomly generated unique identifier assigned to each user of the Travel AcXess Voyage solution.
Traveller Profile	The traveller profile includes departmental, travel preferences and personal information for each user of the Travel AcXess Voyage solution.
X.400	X.400 is a secure e-mail protocol used by the Travel AcXess Voyage solution. Users with X.400 e-mail address mapped to their profile have the ability to receive travel documents and system-generated notifications via e-mail. Users without an x.400 e-mail address mapped to their profile can still use the system, but will not receive notifications by e-mail.

Appendix B: Contact Information

Joanne Berniquez, STSI Implementation Manager
(613) 957-3685

Shannon Watson, STSI
X.400:
(C=CA;ADMD=GOVMT.CANADA;PRMD=GC+PWGSC.TPSGC;O=NCR;S=Watson;G=Shannon)
Fax: (613) 952-1440

STSI Training Team
Sylvia Raider – (613) 952-0437
Zrinka Loucks – (613) 952-0080
Kylee Loyens – (613) 953-0456

Travel AcXess Voyage Technical Support Desk
1-800-514-3798 (Option 4)

Full Service Travel Agency
Departmental Administrator paper profiles must be faxed to 1-866-735-4824

Appendix C: Release 1.0A Implementation Timeline

The following timeline provides a suggested timeframe for the completion of each Playbook task.