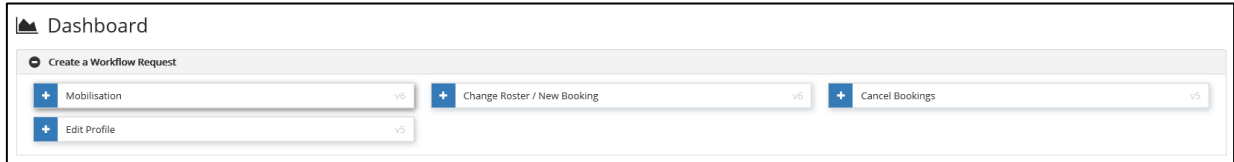## Appendix E – Cancel Booking

Step by step guide for cancelling an approved and committed travel booking within +Process.

This workflow is for cancelling travel only and any site entry cancellation needs to be advised by email to the Site Administrator / Site Contact.
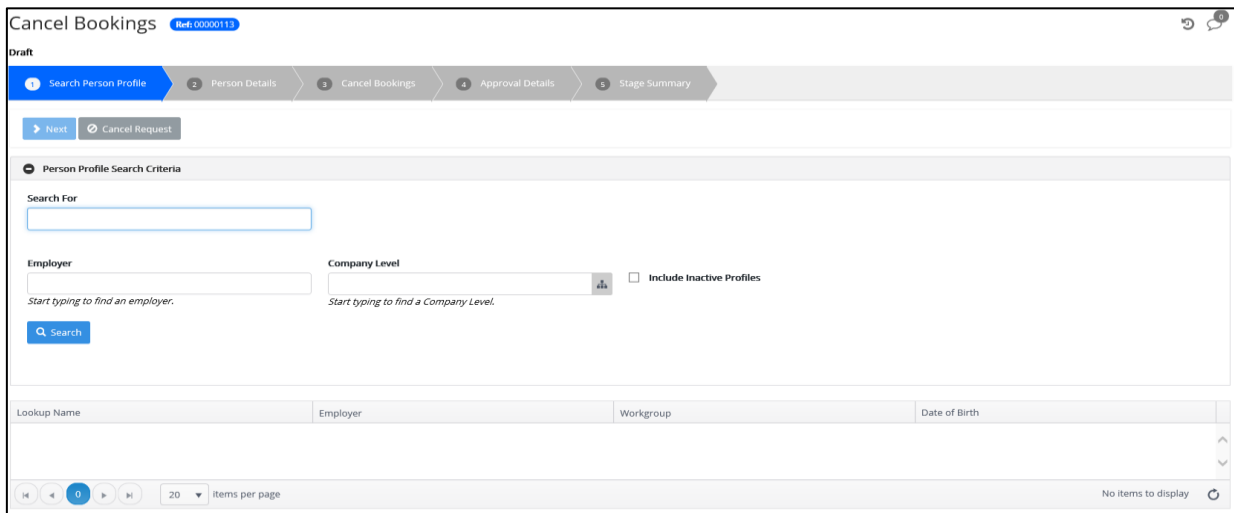
Note: If a Site Entry Profile hasn't been approved and committed it can be cancelled within the request.

1.	Open the +Process module using the following link https://inx-process.nsrltd.com/
2.	The Dashboard will open, click on the 'Cancel Bookings' tab under 'Create a Workflow Request'. **Dashboard** Create a Workflow Request + Mobilisation v6 + Change Roster / New Booking v6 + Cancel Bookings v5 + Edit Profile v5
3.	Search Person Profile page will open. Cancel Bookings Ref: 00000113 Draft 1 Search Person Profile 2 Person Details 3 Cancel Bookings 4 Approval Details 5 Stage Summary ▶ Next ⊘ Cancel Request Person Profile Search Criteria Search For Employer Company Level ☐ Include Inactive Profiles Start typing to find an employer. Start typing to find a Company Level. 🔍 Search Lookup Name Employer Workgroup Date of Birth No items to display
4.	To search, type part of the person's first or last name (not both) in the search box and then click on the search button. Person Profile Search Criteria Search For vend Employer Company Level ☑ Include Inactive Profiles Start typing to find an employer. Start typing to find a Company Level. 🔍 Search
5.	Profiles matching the naming description will then display at the bottom of the page. Check the date of birth matches the profile of the person requiring their booking cancelled and then double click on the Lookup Name to open the profile.

Lookup Name ↑	Employer	Workgroup	Date of Birth
DESERT GOLD VENDING - KUNDANA Inactive	Desert Gold Vending Machines	KAL - EKJV - RHP Mining - Tech - UG Contractor	
GOVENDER, Indran Inactive	Baseline Group	PAU - Administration - Surface Contractor	23/02/1969
INX, Vendor	INX SOFTWARE	ALL - Site Transfers	01/01/1900
KAL - DESERT GOLD VENDING - KB Inactive	Desert Gold Vending Machines	KAL - KB - Mgmt Admin - Surface Contractor	

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				Page No:	1 of 5

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6.	The People Profile details will appear automatically populated and are un-editable within this tab. Click on 'Next' to progress to the Cancel Bookings tab.

7.	On the Cancel Bookings details tab, complete all mandatory fields that have a red asterix next to them:

- Cancel Date From = first date of the booking that needs cancelling
- Cancel Date To = last date of the booking that needs cancelling
- Reason = explanation on why the booking is being cancelled
- Work Status Code = -- Revert to Planned --
- Comments = any additional comments for the Site Administrator, if required

Once all mandatory fields have been completed, click on 'Save'.

Note: If mandatory fields are not completed the following error message will appear and you won't be able to continue to the next page until the fields have been populated.

8.	Once the Cancel Bookings details have been completed, click on the 'Next' button, at any stage you wish to exit and return later click on the 'Save' button. If you do not want to go ahead with the profile click on 'Cancel Request'. ❮ Back ❯ Next ▐◀ Save ⊘ Cancel Request
9.	On the 'Approval Details' tab, one level of approval will need to be selected. **Configure Approvals** Approval Stage Responsible Role(s) Approver * Approval Approver [▼] *Start typing to find an approver.*
10.	Click in the 'Approver' drop down list and select the applicable Site Administration. Approver * [ADMINISTRATION, Jundee ▼] *Start typing to find an approver.* Once the 'Approval Details' have been completed, click on the 'Next' button, at any stage you wish to exit and return later click on the 'Save' button. If you do not want to go ahead with the profile click on 'Cancel Request'. ❮ Back ❯ Next ▐◀ Save ⊘ Cancel Request
11.	The 'Stage Summary' tab will summarise all of the details provided for the Cancel Booking request. **Note:** All changes / amendments to the travel will be highlighted in blue. Click on each tab and review the details that have been supplied, if any changes are required click on the 'Back' button which will take you back to the editable profile where you can move back through the tabs. ❮ Back ⊙ Submit ⊘ Cancel Request
12.	Once the profile is complete and all information provided is correct click on the 'Submit' button. The profile will then be sent to the Site Administrator for approval. Click on the Dashboard to exit the profile.

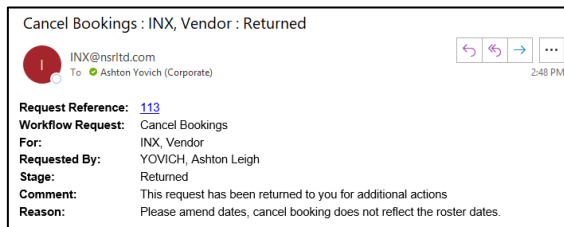| 13.	**Note:** At any stage you would like to communicate or leave a message for the Administrator you are able to insert a comment within the request.
	At the top right hand corner of the profile there is a speech bubble that will show all communication / comments.
	Once a comment has been added to the system it can't be deleted and will remain within the profile where both the Administrator and Initiator will be able to view.
	Note: Email notifications will not occur for internal comments. Once a comment has been added, to view the person must click on the speech bubble icon within the request.
	Notifications for comments will only occur via email when the profile has been declined or returned to the initiator.
	To create a new comment, click on the speech bubble and a notification drop down box will appear, click on the blue + button to add a new comment. Once a comment has been added click on the blue tick to save or on the red cross to delete.
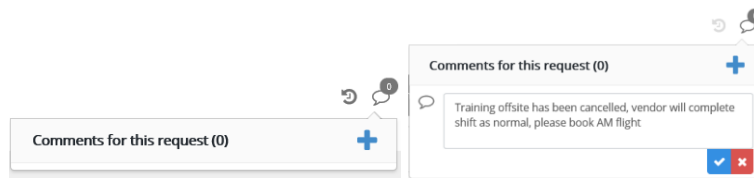
Approval Notifications:

14.	**Returned for Editing:**
	If the cancel booking request has been returned the following email notification will be sent.
	Within the email refer to the comments and the reason behind the return.
	You will need to go back into the request, (click on the request reference number to open the profile), edit the profile as requested and then re-submit for approval.

Cancel Bookings : INX, Vendor : Returned

INX@nsrltd.com
To Ashton Yovich (Corporate)   2:48 PM

Request Reference: 113
Workflow Request: Cancel Bookings
For: INX, Vendor
Requested By: YOVICH, Ashton Leigh
Stage: Returned
Comment: This request has been returned to you for additional actions
Reason: Please amend dates, cancel booking does not reflect the roster dates.

15.	**Committed:**
	If the cancel booking request has been approved the following email notification will be sent.
	All roster / travel changes have uploaded into INX and no further action is required for this request.

Cancel Bookings : INX, Vendor : Committed

INX@nsrltd.com
To Sarah Rosiewicz (Corporate)

Request Reference: 142
Workflow Request: Cancel Bookings
For: INX, Vendor
Requested By: ROSIEWICZ, Sarah
Stage: Committed
Comment: This request has been completed

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				Page No:	4 of 5

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16.	**Declined or Cancelled:**
	If the cancel booking request has been declined or cancelled the following email notifications will be sent and the request will then be closed in the system and will not upload to INX.
	For further information regarding the decline or cancellation please see the Site Administrator.

Cancel Bookings : INX, Vendor : Declined

INX@nsrltd.com
To ⬤ Ashton Yovich (Corporate)   2:51 PM

Request Reference: 114
Workflow Request: Cancel Bookings
For: INX, Vendor
Requested By: YOVICH, Ashton Leigh
Stage: Declined
Reason: Cancel booking has been declined, incorrect details provided.
Comment: This request has been declined
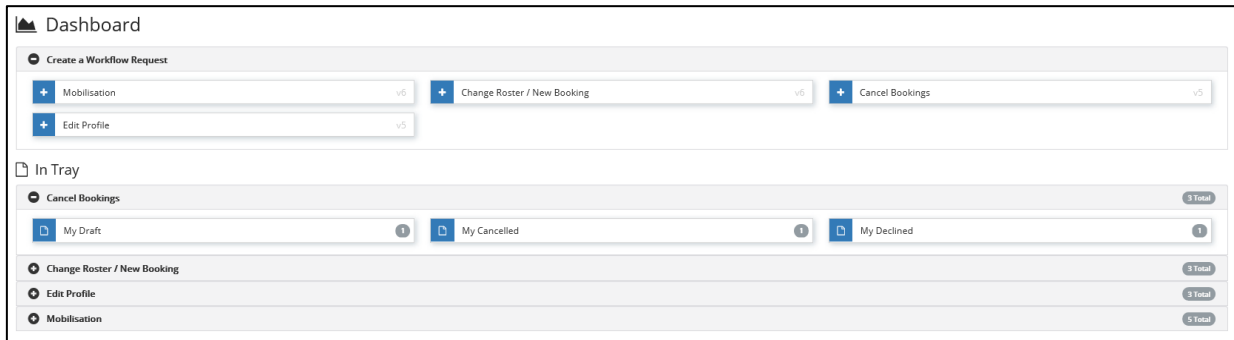
Cancel Bookings : INX, Vendor : Cancelled

INX@nsrltd.com
To ⬤ Ashton Yovich (Corporate)   2:49 PM

Request Reference: 113
Workflow Request: Cancel Bookings
For: INX, Vendor
Requested By: YOVICH, Ashton Leigh
Stage: Cancelled
Comment: This request has been cancelled

Dashboard Home Page

17.	At any stage, if you have saved and exited the Cancel Booking workflow, you can reopen and continue editing the profile.
	Go to the Dashboard on the +Process home page, navigate down to the In Tray - under 'Cancel Booking', click on 'My Draft'.

The workflow request screen will open, click on the reference number to open the Cancel Booking request.

	Re...	Workflow Type	Status	Initiator	Person	Employer	Employment Class	Cancellation Date From	Cancellation Date To
	155	Cancel Bookings	Draft	YOVICH, Ashton Leigh					
	166	Cancel Bookings	Draft	YOVICH, Ashton Leigh					

The profile will open to the last screen that was saved and editing can continue.

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				Page No:	5 of 5