Getting you there

Travel Management Project

Drivers for change

- Automating mostly paper-based processes across faculties and divisions
  - Demonstrate a greater duty of care
  - Consistency in policies
  - Improve efficiency
  - Better management reports
  - Measure internationalisation objective

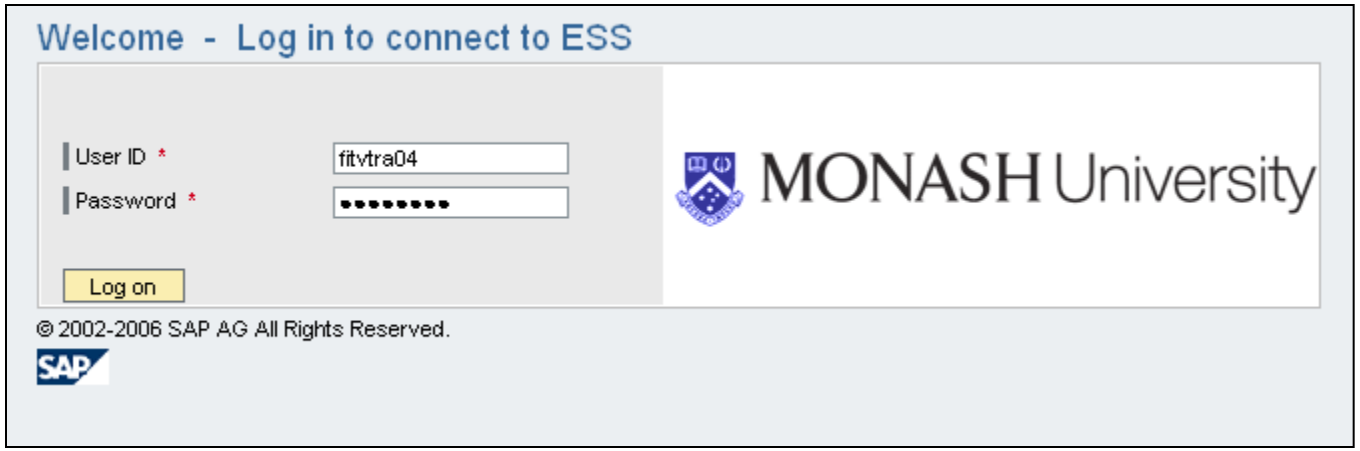
Travel request implementation overview

- Faculty of BusEco pilot Sept 2009
- Faculty of Science live Nov 2009
- Some admin portfolios Jan / Feb 2010
- Office of Vice-Chancellor and President – Feb / Mar 2010
- Other Faculties – Mar to May 2010

Agenda

1. Functionality of the new travel system
2. Workflow of travel requests
3. Reports
4. Preparing for SAP Travel Management

Access to the Travel Management System is via ESS



Travel has its own homepage in ESS

Travel and Expenses

Create New

Create Travel Request (Domestic or International)
Get approval of your business trips prior to your trip.

Travel Insurance Confirmation Certificate (International travel only)
Generate and print your Insurance Confirmation Certificate for International travel.

Overview of Trips

My Trips
Change one of your existing travel requests and print your travel summary.

Display trips and attachments
Display one of your existing travel requests and add or display an attachment.

Travel Diary, Accommodation and Contacts

Edit, Finalise Travel diary, Accommodation and Contacts
Edit, finalise, print or save a copy of your travel diary, accommodation and/or contacts after your travel
request is approved. Any changes will not affect the workflow of your travel request.

Personal Information

Switch personnel number
Temporarily switch to another personnel number to lodge a travel request on that person's behalf.
Please note that you must use a personnel number not a student number.

Travel Resources

Learning Resources

Computer Based Training

Access online courses

Written materials

Travel request overview	PPT	
Trouble-shooting FAQs	PDF	
Quick reference card	PDF	
Create travel request (overview)	PDF	PPT
- Step-by-step examples:		
• Simple trip	PDF	
• Complex trip	PDF	
Generate insurance certificate	PDF	PPT
Change trip	PDF	PPT
Display trip and attachments	PDF	PPT

Learning resources are easily accessible

Travel and Expenses

Create New

Create Travel Request (Domestic or International)
Get approval of your business trips prior to your trip.

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- Step-by-step examples:		
• Simple trip	PDF	
• Complex trip	PDF	
Generate insurance certificate	PDF	PPT
Change trip	PDF	PPT
Display trip and attachments	PDF	PPT

Domestic or international travel requests may be created for employees, HDR students or non-employees

MONASH University

Help | Log Off Welcome Ch

Employee Services | Inventory

Overview | Workflows | Personal Information | Leave Information | Pay Information | Delegations

Monash Trip Request

1 General Data 2 Review and Send 3 Completed

Show Calendar

Traveller: Cheryl Calvert, 01054162

Enter trip data here, when finished click the Review button at the bottom of the screen. The more information links provide help on certain fields.

Trip Summary

Travel type: * Travelling in capacity as: * More information

Start: *

End: *

Business/transit days: * + Personal leave: = Total days: More information

Confirm

Trip Destination/s

Country: * Australia City: * State/Province:

DFAT (of State/Province): * Not applicable (domestic travel) DFAT Travel Advisories Visalink

Arrive date: * Arrive time: 00:00

Depart date: * Depart time: 00:00

Confirm

Add Destination More information

Travel Diary

Travel Diary More information

‘More information’ links provide further guidance

MONASH University

Travelling in Capacity As

1. The purpose of this field is to record the role that the traveller is assuming while travelling for Monash. The role may be an employee, Monash Higher Degree by Research (HDR) student or other (if the role does not fit into the first two categories).
2. The Other “Travelling in Capacity as” category is used for consultants, contractors, honoraries, etc., who are travelling for Monash business purposes and are not employees of Monash.
3. In most cases, the distinction between the traveller roles is straightforward; however, sometimes the distinction is greyed such as when a Monash HDR student is also an employee of Monash. The distinction has some implications:

   3a Monash HDR students and ‘other' travellers may not be subject to Fringe Benefits Tax if they combine personal leave with business leave.

MONASH University

Employee Services | Inventory

Overview | Workflows | Personal Information | Leave Information | Pay

Monash Trip Request

1 General Data — 2 Review and Send — 3 Completed

Show Calendar

Traveller: Cheryl Calvert, 01054162

Enter trip data here, when finished click the Review button at the bottom of the screen. The more information links provide help on certain fields.

Trip Summary

Travel type: * Travelling in capacity as: * More information

Start: *

End: *

Business/transit days: * + Personal leave: = Total days: More information

Confirm

Web link to open DFAT Travel Advisories

MONASH University

Employee Services | Travel Management (Java)

Overview | Workflows | Personal Information | Leave Information | Pay Information | Delegations

Monash Trip Request

1 General Data — 2 Review and Send — 3 Completed

Show Calendar

Traveller: Monash Traveller II, 01064923

Enter trip data here, when finished click the Review button at the bottom of the screen. The

Trip Summary

Travel type: * International — Travelling in capacity as: * Monash employee

Start: * 6/09/2009

End: * 11/09/2009

Business/transit days: * 6 + Personal leave: = Total days: 6

Confirm

Trip Destination/s

Country: Great Britain — City: London

DFAT (of State/Province): * Exercise caution & monitor developments — DFAT Travel Advisories

Arrive date: * 6/09/2009 — Arrive time: 00:00

Depart date: * 11/09/2009 — Depart time: 00:00

Confirm

Add Destination — More information

Travel Diary

Travel Diary — More information

Travel Advisories Index - Australian Department of Foreign Affairs and Trade - Microsoft Inte...

File Edit View Favorites Tools Help

Back Search Favorites

Address http://www.smarttraveller.gov.au/zw-cgi/view/Advice/ Go Links

smartraveller.gov.au

A must see destination.

Australian Government
Department of Foreign Affairs and Trade

- Home
- Travel advisories
- Travel bulletins
- Subscribe
- Travel insurance
- Travel tips
- Travel health
- Getting help overseas
- Children's issues
- Authentications Apostilles
- Our publications
- We speak your language
- Contact us
- Register with us
- Embassies Consulates

TRAVEL ADVISORIES

- What our travel advisories mean
- General advice for Australian travellers on world-wide risks to Australians overseas
- Event or issue-specific Travel Bulletins
- Destinations for which we advise you NOT TO TRAVEL***
- Destinations for which we advise you to RECONSIDER YOUR NEED TO TRAVEL

*** Please note that cities or regions within a particular destination may be at different advice levels.

Travel advisories are also available from the Foreign Affairs Canada, the British Foreign and Commonwealth Office, and the US State Department.

E-MAIL ADVISORIES

Subscribe to receive e-mail updates when we change our Travel Advisories. You'll need to Sign Up to a free account first.

DESTINATIONS

A	B	C	D	E
F	G	H	I	J
K	L	M	N	O
P	Q	R	S	T
U	V	W	Y	Z

RSS FEEDS

RSS rss 2.0 RSS rss 1.0

…..or open visa information

MONASH University

Employee Services | Travel Management (Java)

Overview | Workflows | Personal Information | Leave Information | Pay Information | Delegations

Monash Trip Request

1 General Data — 2 Review and Send — 3 Completed

Show Calendar

Traveller: Monash Traveller II, 01064923

Enter trip data here, when finished click the Review button at the bottom of the screen. The more inf

Trip Summary

Travel type: * International — Travelling in capacity as: * Monash employee — More inf

Start: * 6/09/2009

End: * 11/09/2009

Business/transit days: * 6 + Personal leave: = Total days: 6 — More info

Confirm

Trip Destination/s

Country: Great Britain — City: London — State/

DFAT (of State/Province): * Exercise caution & monitor developments — DFAT Travel Advisories — Visalink

Arrive date: * 6/09/2009 — Arrive time: 00:00

Depart date: * 11/09/2009 — Depart time: 00:00

Confirm

Add Destination — More information

Visalink - Microsoft Internet Explorer provided by Monash University, ITS Division

File Edit View Favorites Tools Help

Back Search Favorites

Address http://visalink.com.au/frontpage.aspx?cookieCheck=true Go Links

visalink.com.au

Travelling fro
Visalink – The

Home
Travel Industry Information
Travel Industry Login
Online Demo
Latest News
Other Services
New USA Rules

About Us
FAQ
Contact Us

ONLINE DEMO

TRACK YOUR VISA APPLICATION

APPLY FOR A VISA: 1 DESTINATION

Powered by visas

Travel diary is automatically created

MONASH University

Employee Services | Travel Management (Java)

Overview | Workflows | Personal Information | Leave Information | Pay Information | Delegations

Monash Trip Request

1 General Data | a Trip Diary | 1 General Data | 2 Review and Send | 3 Completed

Information for completing Travel Diary

Traveller only needs to enter:

- **Start and finish times**
- **Institution**
- **Selects activity from a list**

Trip Diary

New Entry | Sort by date | Check | Delete

Date of activity	Start time	Finish time	Country	City	Institution/Conference name	Type of activity undertaken
6/09/2009	00:00	00:00	Great Britain	London		In transit
7/09/2009	00:00	00:00	Great Britain	London	London School of Economics	Conference-present@refer...
8/09/2009	00:00	00:00	Great Britain	London	London School of Economics	Conference-present@refer...
9/09/2009	00:00	00:00	Great Britain	London	London School of Economics	Conference-present@refer...
10/09/2009	00:00	00:00	Great Britain	London	London School of Economics	Conference-present@refer...
11/09/2009	00:00	00:00	Great Britain	London	London School of Economics	Conference-present@refer...
12/09/2009	00:00	00:00	Great Britain	London	London School of Economics	Conference-present@refer...
13/09/2009	00:00	00:00	Great Britain	London		In transit

Row 1 of 8

Previous Step | Accept

Multiple activities on the one day are possible by clicking "New Entry"

An Adobe PDF of the Travel Diary is generated

File Edit View Document Comments Forms Tools Advanced Window Help

Create PDF · Combine Files · Export · Start Meeting · Secure · Sign · Forms · Review & Comment

1 / 1 63.1% Find

MONASH University

BUSINESS TRAVEL DIARY

Date 24/07/2009

Traveller Details

Title: Mr
Name: Monash Traveller I
Traveller type: Monash employee
Faculty/Portfolio: VP Administration

Summary

Trip No: 0100000270
Trip start: 07/08/2009
Trip end: 11/08/2009
Travel Diary status: Awaiting finalisation

Diary Entries

	Time Taken		Place			
Date of activity	Start	Finish	Country	City	Institution/Conference	Description of Activity
07/08/2009	00:00	00:00	New Zealand	Christchurch		In transit
08/08/2009	09:00	17:00	New Zealand	Christchurch	Victoria Uni	Guest lecturing
09/08/2009	00:00	00:00	New Zealand	Wellington		Personal Leave
09/08/2009	09:00	17:00	New Zealand	Christchurch	Victoria Uni	Academic collaboration
10/08/2009	00:00	00:00	New Zealand	Wellington		Personal Leave
11/08/2009	00:00	00:00	New Zealand	Wellington		In transit

Or an Adobe PDF of the itinerary

File Edit View Document Comments Forms Tools Advanced Window Help

Create PDF Combine Files Export Secure Sign Forms Review & Comment

1 / 1 75% Find

Traveller Details

Name: Traveller type: Monash employee Trip No.: 0100000335

From: 22/02/2010 To: 01/03/2010

Travel Advisory: Reconsider your need to travel Strategic Supplier: Voyager Travel

Trip Purpose

Collaboration with partners at Institute Pertanian Bogor (Bogor Agricultural University) - model development, data collection.

Cost Centre Details

Percentage	Cost Centre	Cost Centre name	Fund	Total
100	S11001	Water Studies Ctr	3937842	1,000
Advance			Grand total	1,000

Trip Destination

Arrive date	Arrive time	Depart date	Depart time	Country	State/Province	City
22/02/2010	16:00	01/03/2010	00:00	Indonesia	West Java	Bogor

Trip Accommodation

From	To	City	Accommodation name	Phone no.	Fax no.
22/02/2010	01/03/2010	Bogor	Hotel Santika Bogor	+62 251 8400707	+62 251 840070

Contact at Destination

Date of activity	City	Institution/Conference	Contact name	Contact phone
23/02/2010	Bogor	Institut Pertanian Bogor	NANA M ARIFJAYA	+62 251 8621 677

An Adobe Insurance Confirmation Certificate is automatically generated

Insurance Confirmation Certificate v9.pdf - Adobe Acrobat Professional

File Edit View Document Comments Forms Tools Advanced Window Help

Create PDF | Combine Files | Export | Forms | 1 / 1 | 65.4% | Find

MONASH University

Trip Number 0100000200

CONFIRMATION OF TRAVEL INSURANCE COVER

1. Traveller Details

This document has been issued to: Cheryl (First name) Calvert (Last name)

To cover a period of absence from: 20th May 2009 (Departure date (inclusive)) 26th May 2009 (Return date (inclusive))

2. Insurer Details

University employees travelling overseas and interstate on University business, and employees of associated entities travelling overseas and interstate on business, are insured under an insurance policy issued by:

Accident and Health International Underwriting Pty Ltd (Policy No.0017915)
GPO Box 4213
SYDNEY NSW 2001
Ph. 02 9251 8700 or 1800 618 700
enquiries@acchealth.com.au

3. Cover Guide

Cover	Local	Overseas
Overseas Medical / Additional Expenses	Nil	Unlimited (for a12 month period)
Personal property - limit of $5,000 on any one item (except computers) - limit of $8,000 on each computer item, however computers must accompany travellers as cabin baggage	$20,000	$20,000
Loss of deposit	$100,000	$100,000
Personal liability	$10,000,000	$10,000,000
Auto rental damage and/or theft (excess or deductible cover)	$7,500	$7,500

Please note: The cover information table is intended as a basic guide only. Full terms, conditions, limitations, exclusions and benefits are set out in the Travel Insurance Policy document. This certificate does not apply to accompanying family members on overseas travel. For enquires phone 61 3 9905 6368.

4. Emergency Contact Information

In the event of an emergency overseas, make a free reverse charge call to:

Accident and Health Assist
Sydney: +61 2 9202 8211

Attachments may be added to the travel request

MONASH University

Employee Services | Travel Management (Java)

Overview | Workflows | Personal Information | Leave Information | Pay Information | Delegations

Monash Trip Request

1 General Data — 2 Review and Send — 3 **Completed**

Travel request 0100000427 was saved

What do you want to do next?

Go to My Trips and Expenses Overview
Create Additional Travel Request
Go to Travel and Expenses homepage
Go to Employee Services homepage

Confirmation Details

Your travel request has been successfully saved and submit

Display/Print Travel Summary

Trip request 0100000427 attachment upload

Browse...

Upload Attachment

Choose file

Look in: Desktop

My Recent Documents
Desktop
My Documents
My Computer
My Network Places

My Documents
My Computer
My Network Places
Access 2003
Acrobat.com
Adobe Acrobat 8 Professional
Adobe Reader 9
Excel 2003
Lotus Notes 8
Mozilla Firefox
Mozilla Thunderbird
OneStop Training
PowerPoint 2003
SAP Logon
SnagIt 8

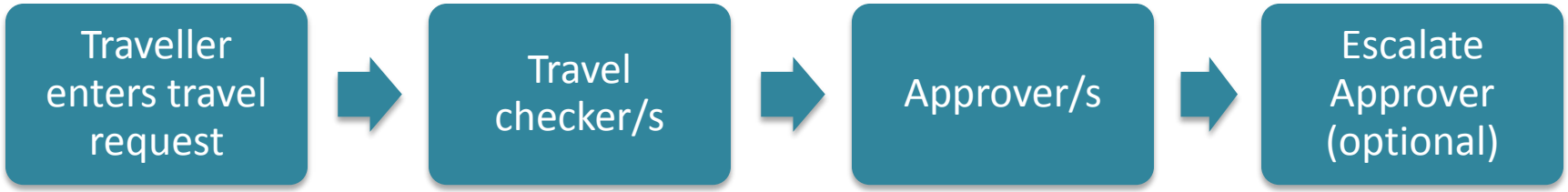
WinSCP3
WinZip
Word 2003
Adobe Reader 9 Installer
~0833349.doc
ASAP.htm
BusEco Executive Presentation.pp
DFAT level.ppt
External Access to Employee Self
how to create and submit a travel
Instructions for using SOBS form
Instructions for using SOBS form
Insurance Confirmation Certificate
KillNotes.exe
SAPlogon

File name:
Files of type: All Files (*.*)
Open
Cancel

Travel request is work-flowed for approval (1)

Low-to-normal risk travel

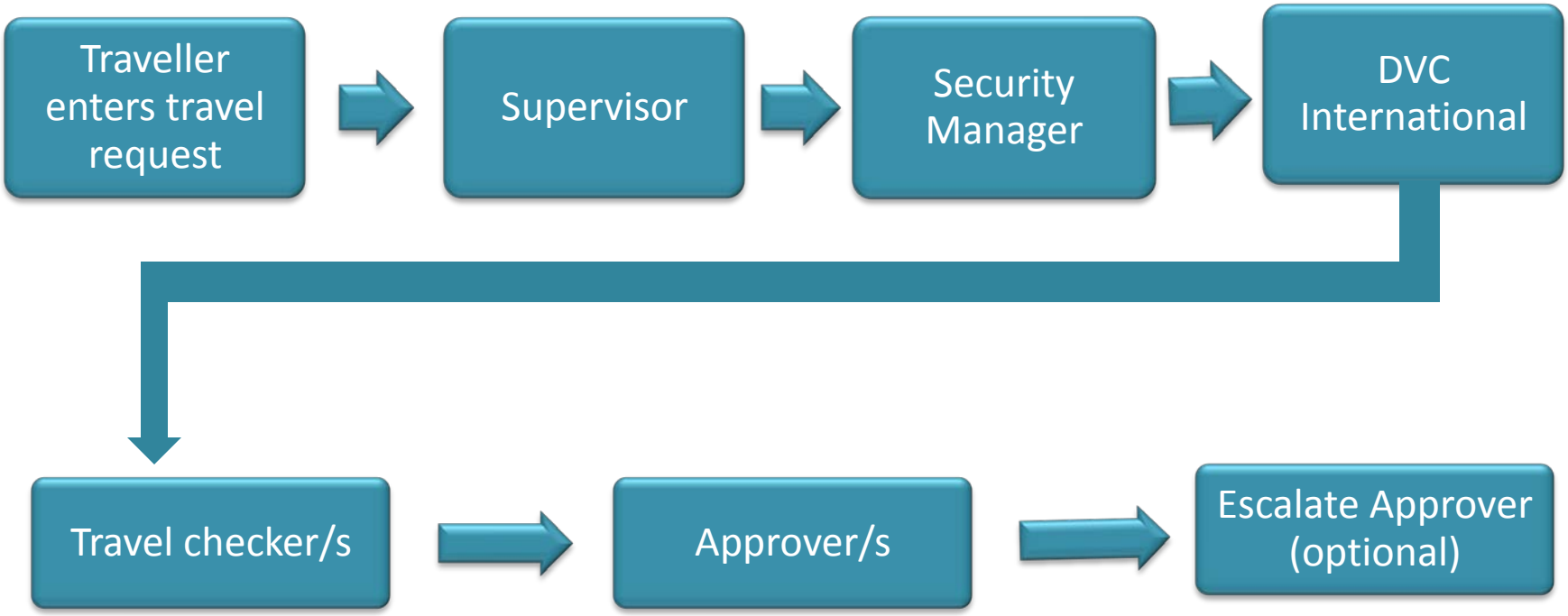
1. Be alert to own security
2. Exercise caution
3. High degree of caution



Travel request is work-flowed for approval (2)

High-risk travel

4. Advised not to travel
5. Do not travel



Travel Checker's ESS Workflow screen

Task - SAP NetWeaver Portal - Windows Internet Explorer

1 Check — 2 Confirm

Display trip | Display attachment | Add attachment

Traveller Cheryl Calvert has requested the following travel:

Trip number	0100000116	Traveller type	Monash employee		
Country	Singapore	City	Singapore	State/Province	
From	1/08/2009	To	17/08/2009		
Cost centre / funds	Z03010 / 1000000				
Estimated cost	0.00	Cash advance	0.00		
Personal days	4				
Highest DFAT level	Exercise caution & monitor developments	DVCI approved	N/A		

Description of activity

Note for traveller

Note for approver

Approver selected

Checked | Change | Reject

Close Window

Travel Checker can display trip details

Task - SAP NetWeaver Portal - Windows Internet Explorer

1 Check → a Display Trip → 1 Check → 2 Confirm

Trip Request 0100000116 Display

Back

Trip Summary

Travel type: International Travelling in capacity as: Monash employee More information

Start: 1/08/2009

End: 17/08/2009

Business/transit days: 13 + Annual leave days: 4 = Total days: 17 More information

Trip Destination/s

Arrival date	Arrival time	Depart date	Depart time	Country	State/Province	City	DFAT (of State/Province)		
1/08/2009	00:00	3/08/2009	00:00	Singapore		Singapore	Exercise caution & monitor developments	Link to DFAT	Link to VISA
4/08/2009	00:00	7/08/2009	00:00	China		Shanghai	Exercise caution & monitor developments	Link to DFAT	Link to VISA
8/08/2009	00:00	17/08/2009	00:00	China		Beijing	Exercise caution & monitor developments	Link to DFAT	Link to VISA

Row 1 of 3

Travel Diary

Date of activity	Start time	Finish time	Country	City	Institution/Conference name	Activity
1/08/2009	00:00	00:00	Singapore	Singapore		In transit
2/08/2009	00:00	00:00	Singapore	Singapore	National	Academic collaboration
3/08/2009	00:00	00:00	Singapore	Singapore	National	Academic collaboration
4/08/2009	00:00	00:00	China	Shanghai	Jiao	Research
5/08/2009	00:00	00:00	China	Shanghai	Jiao	Research
6/08/2009	00:00	00:00	China	Shanghai	Jiao	Research
7/08/2009	00:00	00:00	China	Shanghai	Jiao	Research
8/08/2009	00:00	00:00	China	Beijing	BUTech	Conference-present@refereed
9/08/2009	00:00	00:00	China	Beijing	BUTech	Conference-present@refereed
10/08/2009	00:00	00:00	China	Beijing	BUTech	Conference-present@refereed
11/08/2009	00:00	00:00	China	Beijing		Personal Leave
12/08/2009	00:00	00:00	China	Beijing		Personal Leave
13/08/2009	00:00	00:00	China	Beijing		Personal Leave
14/08/2009	00:00	00:00	China	Beijing		Incidental or Weekend
15/08/2009	00:00	00:00	China	Beijing		Incidental or Weekend
16/08/2009	00:00	00:00	China	Beijing		Personal Leave
17/08/2009	00:00	00:00	China	Beijing		In transit

Row 1 of 17

System sends status emails to traveller

Trip 0100000386 Travel Approver Accept
Batch Account for Workflow to: Cheryl Calvert, Cheryl Calvert

Your travel request 0100000386 has been approved by Philip Raymond Wheatland.

Your Supervisor/Travel approver made the following comment (if any) in the workflow:

Best wishes for a rewarding and successful journey.

****
This mail has been automatically generated by SAP Travel Management.
Please do not reply to this mail.
If you have any queries regarding this mail,
please contact Travel Management.
****

Link to PDF of Important Travel Information

International Travel Information v11 with links.pdf - Adobe Acrobat Professional

IMPORTANT INTERNATIONAL TRAVEL INFORMATION

MONASH University

Travel Advisories

Information about risks overseas is contained in the DFAT advisories available at:

www.smartraveller.gov.au

Travel advisories may change regularly, so it is important to recheck the travel advisory of your destination country and region about 5 days before departure. It is a good idea to subscribe to smartraveller to receive automatic email notifications of any changes to the travel advisory for your destination.

If your destination region has been upgraded to "4 Reconsider your need to travel" or "5 Advised not to travel" prior to departure, then it is imperative that you seek reapproval of your travel request prior to travel.

You may also register your travel with DFAT who will use this information to locate you in the event of an emergency.

Travel Insurance

Prior to business travel, it is important to familiarise yourself with the travel insurance policy coverage. The **Monash Insurance web site** contains useful information about:

- **Business travel insurance policy wording**
- **Policy endorsements and additions**
- **Major policy exclusions**
- **Travel insurance claim form**
- **Frequently asked questions**

An example of a major policy exclusion is 'pre-existing medical conditions'. If you have a pre-existing medical condition that may adversely affect your travel, you must contact the **Monash Insurance Services office** ASAP to check availability of cover. There are several other major policy exclusions, therefore, it is important to be aware and understand the potential impact of these exclusions.

Your insurance confirmation certificate provides reverse charges contact information in the event of an emergency. It is important to keep this certificate with you at all times while overseas.

Visa and Passport

The **Visalink** website is a useful tool for ascertaining any visa requirements and for obtaining visas. If you are a regular traveller to the APEC region, then consider an **APEC Busness Travel Card** as it allows multiple short-term business trips. This may be more cost effective than obtaining single visas.

It is important to check that your name on the air ticket matches your passport and visa. If it does not match, you may be denied aircraft boarding. This is particularly relevant if you use a shortened first name (e.g. Sue > Susan, Bill > William). To avoid problems, make sure you update your travel profile to match your passport.

University Health Service

Travel Health is in a state of constant change. Travellers sometimes have low awareness of the existence and prevention of some diseases, therefore, it is desirable to have pre-travel medical checks & travel-specific advice.

A pre-travel health check can be undertaken at any of the **University's Health Services** or by a private physician. For international travel, it is essential to make an appointment sufficiently in advance, as some immunisation programs may take a number of weeks to complete. It is desirable to attend 4-6 weeks prior to departure, but we understand that this is not always possible. Please attend even if you are travelling at short notice.

Annual Influenza Vaccination is recommended for all international travel. More information on **Travel Health**.

Occupational Health and Safety

It is important for Monash travellers to investigate the conditions likely to be encountered *en route* and at their destination, and then take steps to minimise and control the likely risks. Information for controlling the risks may be obtained from several sources:

- **Guidelines for Health & Safety During Intl Activities**
- **Monash Insurance Office Travel Tips**
- **Traveller's Thrombosis**
- **DFAT Travel Advisories**

The Guidelines for Health and Safety During International Activities highlight the addtional risks that may be encountered during international activities where the living environment, infrastructure, culture and political culture may differ signficantly than Australia.

Cultural Awareness

Cultural awareness aids communication, hence it facilitates positive business outcomes. The Australian **Smarttraveller website** provides some cultural information; however there are more comprehensive sources of cultural information on the worldwide web. For example, the **etiquette, customs and protocol** section in this web link contains useful information.

Monash provides cultural training for specific programs, such as the cross campus program. Other staff may access cultural training depending on the nature of the business activity and the likely benefit.

Please contact **local HR staff** for more information or to arrange pre-departure cultural training.

Continuity Planning

Prior to travel, have you remembered to?:

1. Enable your **telephone vacation message**
2. Enable your **email vacation message**
3. Blocked out your Monash calendar

http://www.adm.monash.edu.au/procserv/travel/system/international-travel-information.pdf

Travel Diary Report (overview screen)

Business Travel Diary Administration

Selected Trip Requests List

Report: ZRW078 Run Date-Time : 15/02/2010 - 22:36:25 , Client: 400

Please select trip number to check travel diary details

Pers.No.	Trav...	Trip	Begins On	Ends On	Trip Days	Type	City	Country	Traveller Type	Status	Cost Ctr	Cost Ctr Name	Estimated
104341	Herz...	100000323	07.02.2010	09.02.2010	3	Domestic	Adelaide	Australia	Monash employee	No need to finalise	B06002	Bus Law & Taxation Clayton	1,211.37
122907	Pag...	100000177	30.01.2010	14.02.2010	16	International	Queenstown	New Zealand	Monash employee	Finalised	S05001	Mathematical Sci-Non Teaching Activities	2,164.00
187701	Hea...	100000312	03.02.2010	11.02.2010	9	International	San Francisco	USA	Monash employee	Finalised	S02401	Centre for Green Chemistry	7,536.00
232924	Pas...	100000250	07.02.2010	09.02.2010	3	Domestic	Adelaide	Australia	Monash employee	No need to finalise	B06002	Bus Law & Taxation Clayton	1,250.00
353982	O'R...	300000000	02.02.2010	07.02.2010	6	International	Hong Kong	Hong Kong	Monash employee	Finalised	B06004	Bus Law & Taxation Peninsula	3,805.90
373542	Zhu ...	100000313	31.01.2010	09.02.2010	10	International	Beijing	China	Monash employee	Awaiting finalisation	B04002	Management Clayton	4,335.18
400298	Bec...	100000211	08.12.2009	04.02.2010	59	International	Bangkok	Thailand	Monash employee	Awaiting finalisation	S02203	Chemistry - Beckett	3,100.00
401543	McK...	100000237	19.01.2010	07.02.2010	20	International	Bangkok	Thailand	Monash employee	Finalised	S11001	Water Studies Centre	2,160.00
404462	Bard...	400000132	12.01.2010	03.02.2010	23	International	Nice	France	Monash employee	Awaiting finalisation	B04001	Management Caulfield	0.00
407127	Gu...	400000141	27.01.2010	01.02.2010	6	International	Melbourne	Australia	Monash employee	Finalised	B06001	Bus Law & Taxation Caulfield	2,364.00
410465	Luxt...	400000138	09.01.2010	05.02.2010	28	International	hong kong	Hong Kong	Monash employee	Finalised	B05001	Marketing Caulfield	2,500.00
474192	Wel...	400000129	07.02.2010	09.02.2010	3	Domestic	Adelaide	Australia	Monash employee	No need to finalise	B06001	Bus Law & Taxation Caulfield	1,022.00
692904	Boy...	100000320	06.02.2010	12.02.2010	7	International	New York	USA	Monash employee	Awaiting finalisation	S02401	Centre for Green Chemistry	3,791.81
722315	Goy...	500000017	03.02.2010	06.02.2010	4	Domestic	Sydney	Australia	Monash employee	Administrator - checked	B07001	Financial Accounting & Auditing	1,400.00
798566	Griffi...	500000033	08.02.2010	12.02.2010	5	Domestic	Hobart	Australia	Monash employee	No need to finalise	B05004	Marketing Berwick	3,110.00

The Status column lets you know where the travel diary is at!

Travel Diary Report (detail screen)

Business Travel Diary Administration

Report: ZRW078 Run Date and Time: 15/02/2010 22:39:15 Client: 400

Trip Request 0400000141 Display

Trip Summary:

Employee	:	00407127
Name	:	
Cost Centre	:	B06001 - Bus Law & Taxation Caulfield
Trip Status	:	Finalised
Trip Start	:	27/01/2010
Trip End	:	01/02/2010
Travel type	:	International
Travel as	:	Monash employee
Business days	:	6.0
Annual Lve days	:	0.0
Total days	:	6.0

Total Estimated Cost $: 2,364.00

Description of Activity: (1) Attending congerence at HK University 29 Jan##(2) Attending conference at Sun Yat Sen University 31 Jan

You can scroll through travel diaries in SAP, and mark them as being checked or sent back for change

Trip Diary:

Date of Ac	Start Time	End Time	Country	City	Institution	Trip activity type
27/01/2010	20:30	23:00	Australia	Melbourne	QANTAS	In transit
28/01/2010	07:00	18:00	Australia	Hong Kong	Hong Kong University	Academic collaboration
29/01/2010	08:30	20:00	Australia	Hong Kong	Hong Kong University	Conference-present@refereed
30/01/2010	10:00	14:00	Australia	Hong Kong	Hong Kong University	Academic collaboration
30/01/2010	14:00	18:00	Australia	Hong Kong	HK-GZ train	In transit
30/01/2010	18:00	20:00	Australia	Guangzhou	Sun Yat Sen University	Academic collaboration
31/01/2010	08:30	16:30	Australia	Guangzhou	Sun Yat Sen University	Conference-present@nonrefereed
31/01/2010	16:30	19:30	Australia	Hong Kong	GZ-HK train	In transit
01/02/2010	07:30	23:00	Australia	Hong Kong	QANTAS	In transit

***** END OF REPORT *****

System sends Travel Diary Reminders

```
*****************************************************************
This is an automated system message regarding:
Trip 0100000212
*****************************************************************

The system indicates your trip ended on 10.01.2010 and we trust you had a
rewarding journey. According to Australian Tax Office requirements, you now
must finalise your travel diary as soon as practical. Please go to the
Travel and Expenses page in ESS and select Edit/Finalise Travel Diary. You
should finalise your travel diary by 16.01.2010 (or within five working
days).

Please note that the system prepared a preliminary travel diary when you
completed your travel request. To finalise your travel diary, you just need
to make any minor amendments and/or confirm that it is final. Please
contact your department's travel administrator if you have any queries.
```

Better system for locating travellers in the event of an emergency

Who is Where? Search for Trip Destinations

Statistics | ALV | ABC | EIS | Selections

Location	Ctr	Regio	Reason	From	Ends On	Personne	Trip
Bangkok	TH			29.06.2010	02.07.2010	01028686	0400000173
Pattaya	TH			24.04.2010	06.05.2010	00401543	0100000371
Bangkok	TH			01.03.2010	12.03.2010	01044243	0400000184
Bangkok	TH			25.01.2010	12.02.2010	01064523	0400000083
Bangkok	TH			19.01.2010	07.02.2010	00401543	0100000237
Bangkok	TH			08.12.2009	04.02.2010	00400298	0100000211

Trip Destination Statistics by Countries

Trip Country	Ctr	Number	Proportion in %
Thailand	TH	6	100.0 %
Total		6	100.0 %

Trip Destination Statistics by Locations

Location	Trip Country	Ctr	Number	Proportion in %
Bangkok	Thailand	TH	5	83.3 %
Pattaya	Thailand	TH	1	16.7 %
Total			6	100.0 %

General Trip Data Report (overview screen)

General Trip Data

Selected Trip Requests List

Report: ZRR179 Run Date-Time : 05/03/2010 - 17:42:05 , Client: 210

Please select trip number to check travel diary details

Pers.No.	Traveller	Trip	Begins On	Ends On	Type	City	Country	Traveller Type	Workflow Status	Action by	Action on	Estimated	Cost Ctr
1000608	Boss Truman John	700000153	12.04.2009	15.04.2009	International	Auckland	New Zealand	Monash employee	Created - Saved Only	CCALVERT	03.04.2009	2,000.00	B07004
1000608	Boss Truman John	700000154	14.04.2009	17.04.2009	International	Auckland	New Zealand	Monash employee	Created - Saved Only	CCALVERT	06.04.2009	2,300.00	B01001
1000608	Boss Truman John	700000154	14.04.2009	17.04.2009	International	Auckland	New Zealand	Monash employee	Created - Saved Only	CCALVERT	06.04.2009	2,300.00	B07005
1000608	Boss Truman John	700000170	23.04.2009	26.04.2009	Domestic	Sydney	Australia	Monash employee	Changed - Saved and Sent	CCALVERT	23.04.2009	500.00	B01001
1000608	Boss Truman John	700000201	24.07.2009	25.07.2009	International	Kabul	Afghanistan	Monash employee	Created - Saved and Sent	CCALVERT	24.07.2009	10,000.00	B01001
1000608	Boss Truman John	700000211	06.08.2009	06.08.2009	Domestic	Perth	Australia	Monash employee	Created - Saved and Sent	CCALVERT	06.08.2009	1,000.00	B01001
1000608	Boss Truman John	700000215	23.02.2009	24.08.2009	International	Argentine	Argentina	Monash employee	Created - Saved and Sent	CCALVERT	24.08.2009	1,000.00	B01001
1000608	Boss Truman John	700000216	01.09.2009	06.09.2009	International	Santiago	Argentina	Monash employee	Created - Saved and Sent	CCALVERT	01.09.2009	0.00	B01001
1000608	Boss Truman John	700000225	12.10.2009	12.10.2009	Domestic	Sydney	Australia	Monash employee	Created - Saved and Sent	CCALVERT	12.10.2009	0.00	B01001
1000608	Boss Truman John	700000227	13.11.2009	21.11.2009	International	Los Angeles	USA	Monash employee	Approver - Approved	FITVAPP01	13.11.2009	0.00	B01001
1001086	Supervisor I Monash	100000117	13.05.2009	14.05.2009	Domestic	syd	Australia	Monash employee	Created - Saved and Sent	FITVTRA04	13.05.2009	0.00	A01001
1001086	Supervisor I Monash	100000118	13.05.2009	14.05.2009	International	kabul	Afghanistan	Monash employee	Changed - Saved and Sent	FITVTRA04	13.05.2009	0.00	A01001
1001092	01 Approver	100000422	01.12.2009	01.12.2009	Domestic	syd	Australia	Monash employee	Approver - Escalated	FITVAPP01	01.12.2009	0.00	B01001

The Workflow status column lets you know where the trip is at in the workflow!

General Trip Data Report (detail screen)

General Trip Data

Report: ZRR179 Run Date and Time:

Trip Request 0100000262 Display

Trip Summary:

Employee : 01001101
Name : Traveller I Monash
Highest DFAT level: Advised not to travel
Workflow Status : Approver - Approved
Trip Start : 25/08/2009 Trip End : 29/08/2009
Travel type : International
Travel as : HDR postgraduate student
Business days : 5.0
Annual Lve days : 0.0
Total days : 5.0
Total Estimated Cost $: 2,800.00
Description of Activity:

Cost Details

Cost Ctr Name	% Distribution	Cost per Ctr$
A01001 - Faculty Of Arts Administration	100.00	2,800.00

Trip Diary:

Date of Ac	Start Time	End Time	Country	City	Institute	Description
25/08/2009	09:00	17:00	Afghanistan	Kabul		In transit
26/08/2009	09:00	17:00	Afghanistan	Kabul	Kabul Uni	Course programs
27/08/2009	09:00	17:00	Afghanistan	Kabul	Kabul Uni	Course programs
28/08/2009	09:00	17:00	Afghanistan	Kabul	Kabul Uni	Course programs
29/08/2009	09:00	20:00	Afghanistan	Kabul		In transit

Trip Contacts:

Date of Ac	Country	City	Institute	Email	Phone	Contact name
25/08/2009	Afghanistan	Kabul				
26/08/2009	Afghanistan	Kabul	Kabul Uni	NKallid@kabuluni.edu.ag		Assoc Prof Kallid
27/08/2009	Afghanistan	Kabul	Kabul Uni			
28/08/2009	Afghanistan	Kabul	Kabul Uni			
29/08/2009	Afghanistan	Kabul				

Trip Accommodation:

From Date	To Date	Country	City	Hotel	Street no.	Street	Phone number	Fax no.
25/08/2009	29/08/2009	Afghanistan	Kabul	Hilton	40	Blare	+93 23 1234 1234	

***** END OF REPORT *****

Preparing for SAP Travel Management (1)

Defining roles

..who in your department / division?

- Creates a travel request on behalf of another= Travel co-ordinator
- Reviews travel requests before forwarding them to the appropriate approver, depending on the traveller's cost centre (optional role) = Travel checker
- Approves travel for a particular cost centre - must have financial delegation (either SAP or paper-based) = Travel approver
- Second level approver role required? = Escalate to
- Also, who is your:
  - Head of Department / School
  - Dean

We need these roles set up in the system in advance of your access being granted to SAP Travel Management

Preparing for SAP Travel Management (2)

Getting up to speed

.Take a look at our website, where you'll find:

Monash University > Strategic Procurement Group > Travel > Project > Faq

Questions and Answers about the Travel Request Process

For which types of travel must I lodge a travel request?

All international travel whether funded by Monash or funded externally. This is because international travel. In terms of domestic travel, please check with your Faculty or Divisi approval of domestic travel. Domestic travel approval procedures are determined at th

Why should I lodge a travel request if the travel is funded externally?

That's because university is responsible for your safety and security, irrespective of who funds the travel, and may need to contact you in the event of an emergency. If international travel, you should lodge a travel request with a zero estimated cost.If domestic travel, please check with your Faculty/Division as to their procedures.

Other questions and answers on the Travel Request process cover the following topics:

Access to the system

Cash advances

Travel diary

International travel - DFAT travel advisory / Travel insurance / International activity reporting

For travel staff and approvers

Travel roles and workflow

Cost assignment

Faculty requirement

Travel Request FAQs

http://www.adm.monash.edu.au/procserv/travel/project/index.html

Monash University > Strategic Procurement Group > Travel > System > Resources

Travel Request Resources

Learning Resources

The page provides an index to all learning materials associated with Travel Request function of the Travel Management System. For more information about the Travel Management project, check out the project website.

Learning resources on the main functions of the travel request process can be found in both PDF and PPT versions:

- The PDF provides a quick overview of the concepts associated with each function
- The PPT provides a more detailed outline of the concepts associated with each function.

est Computer Based Training materia
learning materials will also be availab
ve access to the system.

Travel Request Trouble-shooting Guide PDF (73kb)

This document provides information on the common questions raised to date during training. It will be updated continually as

… and learning resources

http://www.adm.monash.edu.au/procserv/travel/system/request-index.html

.Attend an awareness / briefing session

Get in contact

- Cheryl Calvert – Project Manager
  - Cheryl.calvert@adm.monash.edu.au / x56337
- Jane White – Change & Communications Manager
  - Jane.white@adm.monash.edu.au / x56323