

### Example 2

A Monash Employee travels to three destinations: Singapore, Beijing and Shanghai (i.e. 2 countries and 3 cities) over 17 days for research/academic collaboration purposes. Four days are taken as annual leave. The trip will take place between 1 October 2009 and 17 October 2009. The employee is staying at three different hotels. The trip will be split across two cost centres. A summary of the trip itinerary is as follows:

- 1<sup>st</sup> In transit
- 2<sup>nd</sup> – 3<sup>rd</sup> Singapore, National University of Singapore, Academic collaboration
- 4<sup>th</sup> – 7<sup>th</sup> China, Shanghai, Jiao Tong University, research
- 8<sup>th</sup> – 10<sup>th</sup> China, Beijing, Beijing University of Technology, present paper
- 11<sup>th</sup>- 13<sup>th</sup> Annual Leave
- 14<sup>th</sup> – 15<sup>th</sup> Weekend (incidental days)
- 16<sup>th</sup> Annual leave
- 17<sup>th</sup> In transit (home)

For a simple trip involving a single destination and single cost centre, please see **Example 1**.

The input screen is divided into nine sections:

1. Trip Summary
2. Trip Destinations
3. Travel Diary
4. Destination Contact
5. Description of Activities
6. Accommodation
7. Estimated Cost
8. Cost assignment
9. Travel Management Company



**It is important to complete the sections in order (from top to bottom) and to click Confirm after completing each relevant sections.**

The following sections are required or optional:

- Trip Summary (required)
- Trip Destinations (required)
- Travel Diary (Institution and activity required)
- Destination Contact (one contact per trip required, although one contact per institution recommended)
- Description of Activities (optional)
- Accommodation (optional)
- Estimated Cost (optional, for example trip may be funded externally)
- Cost Assignment (cost centre will default from HR master data record. Changes to cost centre/fund are optional)
- Travel Management Company (required)



**After saving your trip, you have the option to upload attachments, such as a trip itinerary, conference acceptance letter, invitation letter, etc.**

## Getting You There Project – Create Travel Request Complex Example

### Section 1: Trip Summary

1. Go to ESS Travel and Expenses

2. Click [Create Travel Request \(Domestic or International\)](#)

3. The trip summary is completed as follows:

Trip Summary			
Travel type: *	<input type="text" value="International"/>	Travelling in capacity as: *	<input type="text" value="Monash employee"/> <a href="#">More information</a>
Start: *	<input type="text" value="1/10/2009"/>		
End: *	<input type="text" value="17/10/2009"/>		
Business/transit days: *	<input type="text" value="13"/>	+ Personal leave: <input type="text" value="4"/>	= Total days: <input type="text" value="17"/> <a href="#">More information</a>
<input type="button" value="Confirm"/>			

4. Click **Confirm** to transfer the data to the Trip Destination section.

Note, in this example there are 4 days of personal leave (annual leave) taken during the business trip. The system will send an email notification to the traveller (cc the Corporate Finance Division) advising them that FBT may be applicable. The traveller is to contact CFD (Taxation) for FBT advice on this trip.



The **More information** links provide additional documentation, such as the consequences of travelling in the capacity as an employee, as opposed to travelling as a HDR postgraduate student or a contractor.

### Section 2: Trip Destination/s

5. The first trip destination (Singapore) is entered as follows:

Trip Destination/s			
Country:	<input type="text" value="Singapore"/>	City: <input type="text" value="Singapore"/>	State/Province: <input type="text"/>
DFAT (of State/Province): *	<input type="text" value="Exercise caution &amp; monitor developments"/>	<a href="#">DFAT Travel Advisories</a>	<a href="#">Visalink</a>
Arrive date: *	<input type="text" value="1/10/2009"/>	Arrive time: <input type="text" value="00:00"/>	
Depart date: *	<input type="text" value="3/10/2009"/>	Depart time: <input type="text" value="00:00"/>	
<input type="button" value="Confirm"/>			
<input type="button" value="Add Destination"/> <a href="#">More information</a>			

Note, important to change Depart date

6. The State/Province and Arrive time/Depart time are optional fields.



When searching for the country in the drop-down list, type the first letter (in this case S) to be taken to all countries starting with the letter S.

## Getting You There Project – Create Travel Request Complex Example

7. The DFAT Travel Advisory was ascertained by clicking the DFAT Travel Advisory link and searching for the Singapore Travel Advisory.

The screenshot shows the smartraveller.gov.au website. The header includes the logo and the text "A must see destination." and "Australian Government Department of Foreign Affairs and Trade". The main content area is titled "Travel Advice" and features a Singapore flag and the word "Singapore" in green. Below this, there is a section for "Singapore overall" with a DFAT level of "Exercise caution". A map of Singapore is visible on the right side of the page.

8. Click **Confirm**  
 9. Click **Add Destination**  
 10. Enter the 2<sup>nd</sup> destination as follows:

DFAT Travel Advisories

**Trip destination**

New Entry | Sort by date | Check | Delete

	Arrive date	Arrive time	Depart date	Depart time	Country	State/Province	City	DFAT(of State/Province)
	1/10/2009	00:00	3/10/2009	00:00	Singapore		Singapore	Exercise caution & monitor ...
	4/10/2009	00:00	7/10/2009	00:00	China		Shanghai	Exercise caution & monitor ...



The arrive and depart dates are changed, as well as the Country, City and DFAT level.

11. Click the **DFAT Travel Advisory Link** at the top of the table to locate the DFAT level for China. In this case it is 'Exercise caution & monitor developments.'  
 12. Click **New Entry** to add a third line for Beijing:

**Trip destination**

New Entry | Sort by date | Check | Delete

	Arrive date	Arrive time	Depart date	Depart time	Country	State/Province	City	DFAT(of State/Province)
	1/10/2009	00:00	3/10/2009	00:00	Singapore		Singapore	Exercise caution & monitor developments
	4/10/2009	00:00	7/10/2009	00:00	China		Shanghai	Exercise caution & monitor developments
	8/10/2009	00:00	17/10/2009	00:00	China		Beijing	Exercise caution & monitor developments

13. Click **Check** to validate the destination data  
 14. Click **Accept**

### Section 3 – Travel Diary

15. Click the travel diary button to be taken to the Travel Diary table. The first five columns of the table have been proposed by the system. The last two columns are required entry fields.

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	
1/10/2009	00:00	00:00	Singapore	Singapore			
2/10/2009	00:00	00:00	Singapore	Singapore			
3/10/2009	00:00	00:00	Singapore	Singapore			
4/10/2009	00:00	00:00	China	Shanghai			
5/10/2009	00:00	00:00	China	Shanghai			
6/10/2009	00:00	00:00	China	Shanghai			
7/10/2009	00:00	00:00	China	Shanghai			
8/10/2009	00:00	00:00	China	Beijing			
9/10/2009	00:00	00:00	China	Beijing			
10/10/2009	00:00	00:00	China	Beijing			
11/10/2009	00:00	00:00	China	Beijing			
12/10/2009	00:00	00:00	China	Beijing			
13/10/2009	00:00	00:00	China	Beijing			
14/10/2009	00:00	00:00	China	Beijing			
15/10/2009	00:00	00:00	China	Beijing			
16/10/2009	00:00	00:00	China	Beijing			
17/10/2009	00:00	00:00	China	Beijing			

Row 1 of 17

Previous Step Accept



**Note the following activities: in transit, incidental, personal leave and public holiday do not require an institution/conference name.**

16. There are seventeen days in the trip so the table is displaying rows 1 – 17.



**Check that all days of your trip are visible in the travel diary. If not, you may need to change the Row number. For example, if your trip is for 25 days and you can only see Row 1 – 17, then jump to row 18 by entering 18 in the Row box.**

17. You can add multiple activities on the one day by selecting **New Entry**, or you can delete any duplicated rows by clicking **Delete**.
18. Complete the travel diary as follows:
19. If you do not know your start and finish times, leave them as the default (00:00). You have the opportunity to change them later after your travel request is approved, or you can change them now.

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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
1/10/2009	00:00	00:00	Singapore	Singapore		In transit
2/10/2009	00:00	00:00	Singapore	Singapore	National University of Singapore	Academic collaboration
3/10/2009	00:00	00:00	Singapore	Singapore	National University of Singapore	Academic collaboration
4/10/2009	00:00	00:00	China	Shanghai	Jiao Tong University	Research
5/10/2009	00:00	00:00	China	Shanghai	Jiao Tong University	Research
6/10/2009	00:00	00:00	China	Shanghai	Jiao Tong University	Research
7/10/2009	00:00	00:00	China	Shanghai	Jiao Tong University	Research
8/10/2009	00:00	00:00	China	Beijing	Beijing University of Technology	Conference-present@refereed
9/10/2009	00:00	00:00	China	Beijing	Beijing University of Technology	Conference-present@refereed
10/10/2009	00:00	00:00	China	Beijing	Beijing University of Technology	Conference-present@refereed
11/10/2009	00:00	00:00	China	Beijing		Personal Leave
12/10/2009	00:00	00:00	China	Beijing		Personal Leave
13/10/2009	00:00	00:00	China	Beijing		Personal Leave
14/10/2009	00:00	00:00	China	Beijing		Incidental
15/10/2009	00:00	00:00	China	Beijing		Incidental
16/10/2009	00:00	00:00	China	Beijing		Personal Leave
17/10/2009	00:00	00:00	China	Beijing		In transit



To copy and paste the institution, highlight the words you wish to copy then Right (or left) click your mouse button. Alternatively use CTRL-C and CTRL-P to copy and paste.



The DVC International maintains a database of international activities and the activities above have been synchronised with this database. This makes the reporting of international activities simpler. You have the opportunity to provide more detailed information about the activity in the next section “Description of Activity/s”.

20. Click **Check** to validate your travel diary

21. Click **Accept** to accept your entry

### Section 4 Description of Activity/s

22. This section involves a free-text field of unlimited length. Here you can more closely describe your activity or detail the funding source for your trip.

**Description of Activity/s**

Description of activity/s: Singapore - Work with Dr Ang Lim on developing a new subject for the Masters in Accounting program.  
Shanghai - visit Jiao Tong university for research data



**It would be useful for your travel administrator/approver if you could describe each institution’s activity.**

### Section 5 Contact at Destination

23. In this section you provide at least one destination contact for your trip, although it is advisable to provide a contact for each institution you are visiting.

Contact at Destination								[for phone number please include country and area code (e.g. +44 115 1111 1111)]	
Check									
Date of activity	Country	City	Institution/Conference name	Contact name	Contact position	Contact email	Contact phone		
1/10/2009	Singapore	Singapore							
2/10/2009	Singapore	Singapore	National University of Singapore	Ms Chow Kuan Lee	Course Co-ordinator		+65 6516 1010		
3/10/2009	Singapore	Singapore	National University of Singapore						
4/10/2009	China	Shanghai	Jiao Tong University	Prof Wilson Lee	Head of Department, Accountin		+86 21 575 59999		
5/10/2009	China	Shanghai	Jiao Tong University						
6/10/2009	China	Shanghai	Jiao Tong University						
7/10/2009	China	Shanghai	Jiao Tong University						
8/10/2009	China	Beijing	Beijing University of Technology	Prof Sharon Jones	Conference Organiser	shones@bjpu.edu.cn			
9/10/2009	China	Beijing	Beijing University of Technology						
10/10/2009	China	Beijing	Beijing University of Technology						
11/10/2009	China	Beijing							
12/10/2009	China	Beijing							
13/10/2009	China	Beijing							
14/10/2009	China	Beijing							
15/10/2009	China	Beijing							
16/10/2009	China	Beijing							
17/10/2009	China	Beijing							



**You can add multiple contacts for the same institution by utilising the blank rows. You may include a contact number for your annual leave days if you want to (optional); however, please include “private contact” in the contact position field.**

24. Click **Accept**

### Section 6 Accommodation

The Accommodation section is optional if you do not know your accommodation details now. You can add accommodation later after your travel request is approved, without it affecting the workflow of your travel request. We will add accommodation now as the traveller has organised their accommodation prior to lodging their travel request.

## Getting You There Project – Create Travel Request Complex Example

**Accommodation**

Accommodation name:  From:  To:

Street number:  Street:

Country:  City:

Phone number:  Fax number:  Please include country and area code (e.g. +44 115 1111 1111)

[More information](#)

25. The dates, country and city will default from earlier entries. If you are staying at more than one accommodation, change the 'To' date and the click **Add accommodation**.

26. In this example, the traveller is staying at three hotels, so **Add Accommodation** to add the next 2 hotels:

**Accommodation** [for phone number please include country and area code (e.g. +44 115 1111 1111)]

From	To	Country	City	Accommodation name	Street number	Street	Phone number	Fax number
1/10/2009	3/10/2009	Singapore	Singapore	Marriott Hotel	320	Orchard Road	+65 6516 1010	+65 6778 7570
4/10/2009	7/10/2009	China	Shanghai	Intercontinental Hotel	777	Zhangyang Rd Shanghai	+86 21 5835 6666	
8/10/2009	17/10/2009	China	Beijing	Intercontinental Hotel	11	Financial st Beijing	+86 10 5852 5888	

27. Click **Accept**

### Section 7 – Estimated Costs

28. Enter the costs of your trip. You can enter whole dollars only, or dollars and cents, however do not use currency symbols such as \$.

**Estimated costs**

Airfares:

Accommodation:

Meals:

Conference registration:

Hire car:

Mobile phone roaming:

Other:

Total estimated cost:  AUD [More information](#)

29. Click **Confirm** to total the estimated cost.



Please note that the estimated cost is for information purposes only. Actual costs are posted to cost centres and funds when your Corporate Credit Card or travel expense claim is settled.

## Section 8 – Cost Assignment

In this example, the trip is split equally across two cost centres A01001 and Z03001. Please note that all travel administrators in both cost centres will receive the request once it has been sent by the traveller. This will require some co-ordination amongst the travel administrators as to who processes the request, as only one person can process it.

**Cost Assignment**

100 % Cost Center A01001 (A01001), Fund 1000000 (1000000), Funds Center A01001 (Arts Fact Admin), Company Code 1000 (Monash University)

[Change Cost Assignment](#) [More information](#)

30. The cost centre and fund will default from your HR master data record.

31. Click the **Change Cost Assignment** button to add an additional cost centre.

32. Change the breakdown of the first cost centre to 50:

Breakdown	Accounting Object	Company Code
<input checked="" type="radio"/> 50 %	All 1000000/Z03001	1000 - Monash University

Cost Center: \* Z03001 [My Cost Centers](#)

Fund: \* 1000000

33. Click **New Entry** button

34. Enter the second cost centre and fund:

<input type="radio"/> 50 %	All 1000000/Z03001	1000 - Monash University
<input checked="" type="radio"/> 50 %	All	1000 - Monash University

Cost Center: \* A01001 [My Cost Centers](#)

Fund: \* 1000000

[New Entry](#) [Check](#) [Delete](#)

35. Click **Check** to validate the cost centre and fund

36. Click the orange **Accept** button

37. You should now see both cost centres in the **Cost Assignment** section

**Cost Assignment**

50 % Cost Center Z03001 (Z03001), Fund 1000000 (1000000), Funds Center Z03001 (Corp Finance Div), Company Code 1000 (Monash University)

50 % Cost Center A01001 (A01001), Fund 1000000 (1000000), Funds Center A01001 (Arts Fact Admin), Company Code 1000 (Monash University)

[Change Cost Assignment](#) [More information](#)

## Section 9 – Travel Management Company (for airfare)

In this section you nominate which Travel Management Company you will use to book your airfare. Monash's preferred travel agents are HRG and Voyager. If you do not use either HRG Australia or Voyager Travel Corp., you will need to provide further details. In this example, the traveller will use HRG Australia.

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Travel Management Company (for airfare only)

Strategic supplier: \* HRG Australia Quote reference:  [More information](#)

Reason for not using strategic supplier:  Non-strategic supplier name:

Further details:

38. Click **Confirm**

39. Click **Review**

40. If there are no error messages, you should see the following Save options:

**Final Action**

Save only I only want to save my travel request and send it later.

Save and Send I want to save my travel request and send it for further processing.  
**I confirm that I have entered all data to the best of my knowledge.**

**Save only** will not workflow your travel request. Choose this option if you want to make changes to your travel request, or confirm some of the information.

**Save and Send** will workflow the travel request to one or more travel administrators in your cost centre for processing.

41. In this example, select the **Save and Send** radio button to send the travel request to the next person:

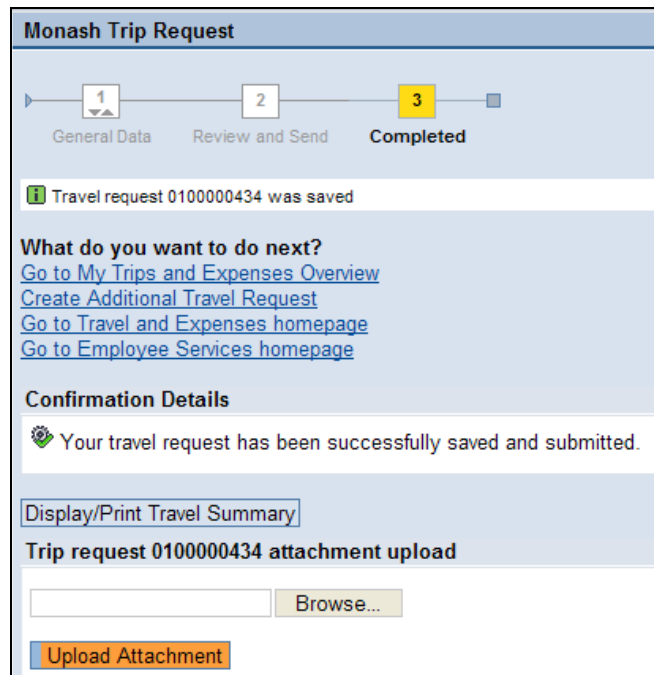
**Final Action**

Save only I only want to save my travel request and send it later.

Save and Send I want to save my travel request and send it for further processing.  
**I confirm that I have entered all data to the best of my knowledge.**

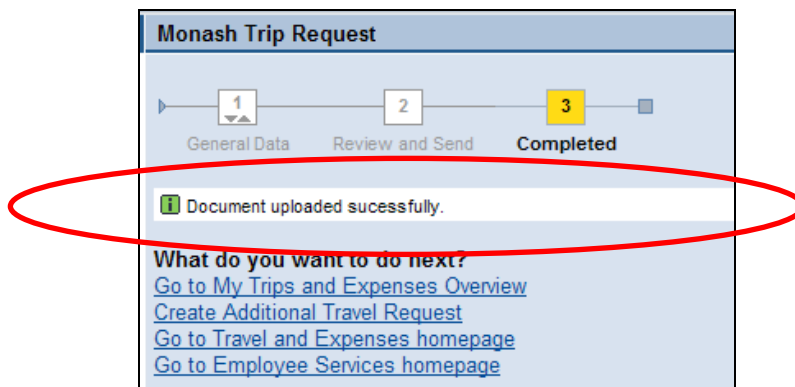
42. Click the orange **Save and Send** button. You should now see the following screen:

## Getting You There Project – Create Travel Request Complex Example



The screenshot shows the 'Monash Trip Request' interface. At the top, a progress bar indicates three steps: '1 General Data', '2 Review and Send', and '3 Completed'. Below the progress bar, a green message box states 'Travel request 0100000434 was saved'. Underneath, a section titled 'What do you want to do next?' contains four blue hyperlinks: 'Go to My Trips and Expenses Overview', 'Create Additional Travel Request', 'Go to Travel and Expenses homepage', and 'Go to Employee Services homepage'. A 'Confirmation Details' section follows, with a green gear icon and the text 'Your travel request has been successfully saved and submitted.' Below this is a button labeled 'Display/Print Travel Summary'. The final section is 'Trip request 0100000434 attachment upload', which includes a text input field, a 'Browse...' button, and an orange 'Upload Attachment' button.

43. At this point, you can add one or more attachments to your travel request by clicking the **Browse** button. The system currently does not support MS2007 documents so please save your document down to a lower version before attempting to upload it.
44. Once you have selected your attachment, click **Upload Attachment** to be presented with the message “Document uploaded successfully”:



This screenshot is similar to the previous one, showing the 'Monash Trip Request' interface. The progress bar still shows '3 Completed'. The green message box now says 'Document uploaded successfully.' and is circled in red. The rest of the interface, including the 'What do you want to do next?' links and the 'Confirmation Details' section, remains the same.

45. You can also **Display/Print** your travel request summary at this point by clicking the **Display/Print Travel Summary** button
46. To check on the status of your trip, or make any changes to the trip, select [My Trips and Expenses Overview](#)
47. In **My Trips** the workflow status column indicates the last stage your travel request is at. Created – saved and sent means the travel request has been created by the traveler and sent to their travel administrator.



**Please see the right-hand side of the ESS Travel and Expenses page for documentation on the meaning of the different workflow statuses.**

48. Once the travel request is processed by your travel administrator, you will receive an email notification of the outcome. Further, once the travel request is processed by your travel approver, you will also receive an email notification.