

### Example 1

A Monash Employee travels to a single destination (Kuala Lumpur, Malaysia) for ten days for teaching purposes. The trip will take place between 1 July 2009 and 10 July 2009. The employee is staying at the Sunway Lagoon Hotel next to the Monash Malaysian Campus.

For a complex trip involving multiple destinations and cost centres, please see **Example 2**.

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 Simple 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: \*  Travelling in capacity as: \*  [More information](#)  
Start: \*    
End: \*    
Business/transit days: \*  + Personal leave:  = Total days:  [More information](#)

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

Note, in this example there is no personal leave (such as annual leave) taken during the business trip so the **Personal leave** field is left blank.



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 trip destination data is entered as follows:

**Trip Destination/s**  
Country:  City:  State/Province:   
DFAT (of State/Province): \*  [DFAT Travel Advisories](#) [Visalink](#)  
Arrive date: \*   Arrive time:    
Depart date: \*   Depart time:    
  
 [More information](#)

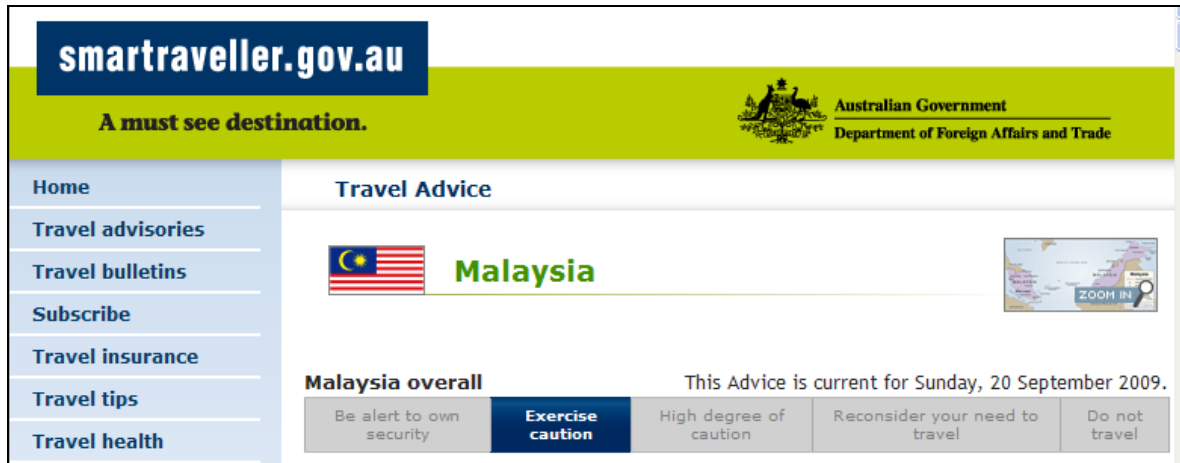
6. The State/Province and Arrive time/Depart time are optional fields.



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

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- The DFAT Travel Advisory was ascertained by clicking the DFAT Travel Advisory link and searching for the Malaysia Travel Advisory.

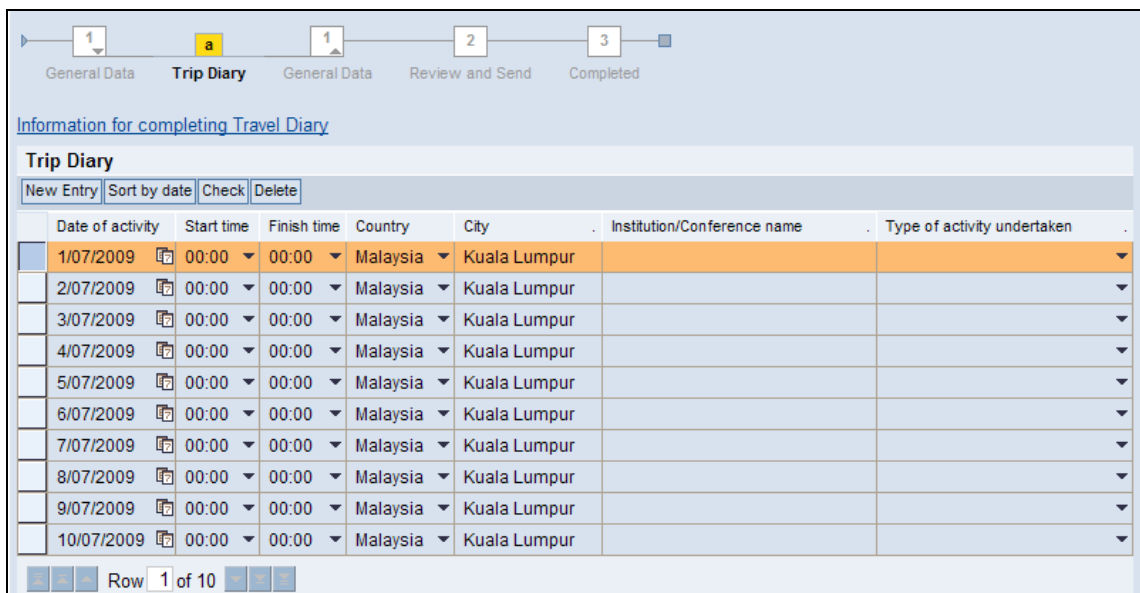


The screenshot shows the smartraveller.gov.au website. The header includes the logo and the text "A must see destination." and "Australian Government Department of Foreign Affairs and Trade". The main content area is titled "Travel Advice" and features a section for "Malaysia" with the Malaysian flag and a map. Below this, there is a "Malaysia overall" section with a progress indicator showing "Exercise caution" selected. The progress indicator consists of five boxes: "Be alert to own security", "Exercise caution", "High degree of caution", "Reconsider your need to travel", and "Do not travel". The text "This Advice is current for Sunday, 20 September 2009." is also present.

- Click **Confirm**

### Section 3 – Travel Diary

- 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.



The screenshot shows the "Trip Diary" table in the system. The table has the following columns: Date of activity, Start time, Finish time, Country, City, Institution/Conference name, and Type of activity undertaken. The first row is highlighted in orange and shows the date 1/07/2009, start and finish times of 00:00, and the location Malaysia, Kuala Lumpur. The table is currently showing 10 rows, with the first row selected.

Date of activity	Start time	Finish time	Country	City	Institution/Conference name	Type of activity undertaken
1/07/2009	00:00	00:00	Malaysia	Kuala Lumpur		
2/07/2009	00:00	00:00	Malaysia	Kuala Lumpur		
3/07/2009	00:00	00:00	Malaysia	Kuala Lumpur		
4/07/2009	00:00	00:00	Malaysia	Kuala Lumpur		
5/07/2009	00:00	00:00	Malaysia	Kuala Lumpur		
6/07/2009	00:00	00:00	Malaysia	Kuala Lumpur		
7/07/2009	00:00	00:00	Malaysia	Kuala Lumpur		
8/07/2009	00:00	00:00	Malaysia	Kuala Lumpur		
9/07/2009	00:00	00:00	Malaysia	Kuala Lumpur		
10/07/2009	00:00	00:00	Malaysia	Kuala Lumpur		



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

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10. There are ten days in the trip so the table is displaying rows 1 – 10.



**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 – 10, then jump to row 11 by entering 11 in the Row box.**

11. You can add multiple activities on the one day by selecting **New Entry**, or you can delete any duplicated rows by clicking **Delete**.

12. Complete the travel diary as follows:

Information for completing Travel Diary

**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
1/07/2009	00:00	00:00	Malaysia	Kuala Lumpur		In transit
2/07/2009	00:00	00:00	Malaysia	Kuala Lumpur	Monash Malaysia	Course programs
3/07/2009	00:00	00:00	Malaysia	Kuala Lumpur	Monash Malaysia	Course programs
4/07/2009	00:00	00:00	Malaysia	Kuala Lumpur	Monash Malaysia	Course programs
5/07/2009	00:00	00:00	Malaysia	Kuala Lumpur	Monash Malaysia	Course programs
6/07/2009	00:00	00:00	Malaysia	Kuala Lumpur	Monash Malaysia	Course programs
7/07/2009	00:00	00:00	Malaysia	Kuala Lumpur	Monash Malaysia	Course programs
8/07/2009	00:00	00:00	Malaysia	Kuala Lumpur	Monash Malaysia	Course programs
9/07/2009	00:00	00:00	Malaysia	Kuala Lumpur	Monash Malaysia	Course programs
10/07/2009	00:00	00:00	Malaysia	Kuala Lumpur		In transit

Row 1 of 10

Previous Step Accept

13. 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.



**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”.**

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

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

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### Section 4 Description of Activity/s

16. 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: Teaching BEW4000 in the BBusCom (Hons) program at Monash University Malaysia campus

### Section 5 Contact at Destination

17. 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.

Information for completing Contact at Destination

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

Date of activity	Country	City	Institution/Conference name	Contact name	Contact position	Contact email	Contact phone
1/07/2009	Malaysia	Kuala Lumpur					
2/07/2009	Malaysia	Kuala Lumpur	Monash Malaysia	Prof. Ron Edwards	Head of School		+(603) 5514 6000
3/07/2009	Malaysia	Kuala Lumpur	Monash Malaysia				
4/07/2009	Malaysia	Kuala Lumpur	Monash Malaysia				
5/07/2009	Malaysia	Kuala Lumpur	Monash Malaysia				
6/07/2009	Malaysia	Kuala Lumpur	Monash Malaysia				
7/07/2009	Malaysia	Kuala Lumpur	Monash Malaysia				
8/07/2009	Malaysia	Kuala Lumpur	Monash Malaysia				
9/07/2009	Malaysia	Kuala Lumpur	Monash Malaysia				
10/07/2009	Malaysia	Kuala Lumpur					



You can add multiple contacts for the same institution by utilising the blank rows.

18. 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 staying at the Sunway Lagoon Resort next to the Monash campus.

**Accommodation**

Accommodation name:  From: 1/07/2009  To: 10/07/2009

Street number:  Street:

Country: Malaysia  City: Kuala Lumpur

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

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19. 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**.
20. In this example, the traveller is staying at one hotel only so enter the following fields:

Accommodation	
Accommodation name:	<input type="text" value="Sunway Lagoon Hotel"/> From: <input type="text" value="1/07/2009"/> To: <input type="text" value="10/07/2009"/>
Street number:	<input type="text"/> Street: <input type="text" value="Persiaran Lagoon Bandar Sunway"/>
Country:	<input type="text" value="Malaysia"/> City: <input type="text" value="Kuala Lumpur"/>
Phone number:	<input type="text" value="+603) 5514 6999"/> Fax number: <input type="text"/> Please include country and area code (e.g. +44 115 1111 1111)
<input type="button" value="Confirm"/>	

21. Click **Confirm**

### Section 7 – Estimated Costs

22. 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:	<input type="text" value="1,200"/>
Accommodation:	<input type="text" value="1,800"/>
Meals:	<input type="text" value="900"/>
Conference registration:	<input type="text" value="0"/>
Hire car:	<input type="text" value="0"/>
Mobile phone roaming:	<input type="text" value="0"/>
Other:	<input type="text" value="0"/>
Total estimated cost:	<input type="text" value="3,900.00"/> AUD <a href="#">More information</a>
<input type="button" value="Confirm"/>	

23. 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

**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](#)

24. The cost centre and fund will default from your HR master data record. You can change the cost and fund by clicking the **Change Cost Assignment** button.
25. The **More information** link provides further information on how to change the cost centre and fund. In this example, we will accept the default A01001 and Fund 1000000. Please also see **Example 2** for multiple cost centres/funds.

### 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.

**Travel Management Company (for airfare only)**

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

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

Further details:

[Confirm](#)

26. Click **Confirm**
27. Click **Review**
28. 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.**

[Previous Step](#) [Save](#) [Exit](#)

**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.

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29. 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.**

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

1 2 3  
General Data Review and Send Completed

Travel request 0100000433 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 submitted.

Display/Print Travel Summary

Trip request 0100000433 attachment upload

Browse...  
Upload Attachment

31. 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.

32. Once you have selected your attachment, click **Upload Attachment** to be presented with the message "Document uploaded successfully":

Monash Trip Request

1 2 3  
General Data Review and Send Completed

Document uploaded successfully.

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](#)

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33. You can also **Display/Print** your travel request summary at this point by clicking the **Display/Print Travel Summary** button
34. To check on the status of your trip, or make any changes to the trip, select [My Trips and Expenses Overview](#)
35. 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.**

36. 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.