31 March 2011

SAP Travel Management

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WF7. The HDD is travelling to a high risk country and he/she has received his/her own travel request in ESS workflow to process.

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WF10. The travel request did not go to the right travel checker/approver.

WF11. How do I know where my travel request is at? (see CR-G4).

WF12. I cannot open an attachment in the travel request (see DT1)

AC1. I cannot use Internet Explorer to access ESS. I am using IE 8.

Internet Explorer 8 is not automatically compatible with ESS. However, you can change your compatibility settings.

1. Open **Internet Explorer**
2. Go to **Tools > Compatibility View Settings**
3. Enter **monash.edu.au** in the field titled “add this website”
4. Click **Add** button
5. Close screen

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AC2. When I click Travel and Expenses link in ESS, the system returns an Internal Server Error.

There is an issue with your HR master data record. All travellers need travel privileges (infotype 17) in their HR profile. This was done automatically for all Monash staff, however, the program may have missed some new staff or staff who have recently changed roles. Please contact ***the HR helpdesk (ext 20400)*** and request travel privileges to be added to your HR master record.

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AC3. I cannot access the travel system from outside the University.

ESS is a secure service and requires a secure connection to access it. Anyone wanting to access ESS from outside the university will need a **digital certificate and virtual private network (VPN)** client installed on their computer.

The certificate must be arranged by your IT security officer and must be installed into the VPN.
http://its.monash.edu/staff/security/staff-only/certs/ra/ra-contacts.html
The link to the VPN client is:
http://www.its.monash.edu.au/staff/networks/vpn/

<< note instructions for using the new SMS service are to go here >>

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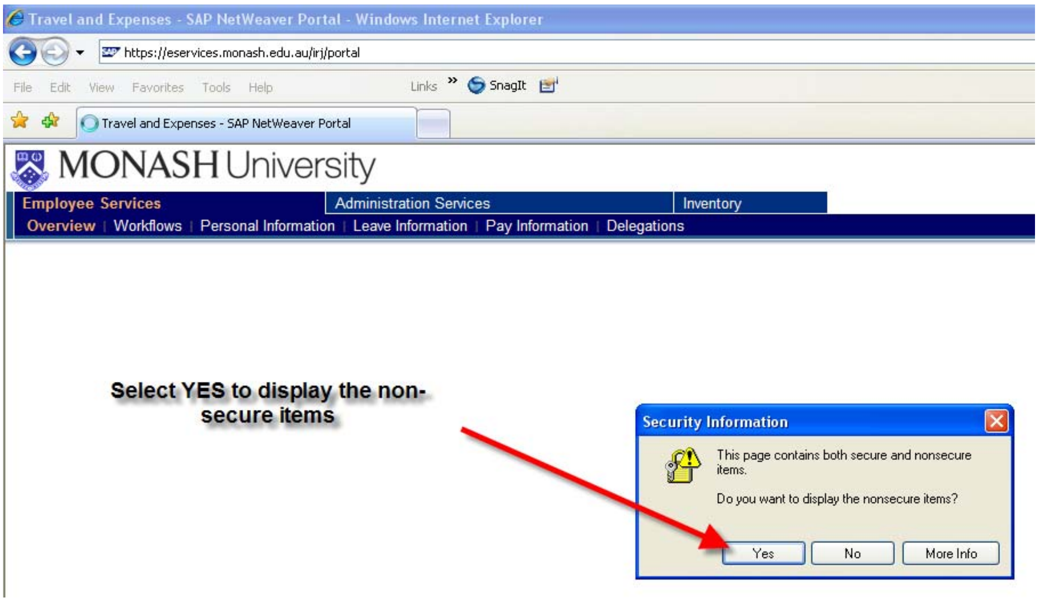
AC4. I cannot see the travel documentation materials on the right-hand side of the Travel and Expenses main page

All documentation materials are on the right hand side of the **ESS Travel and Expenses** page. If you cannot see them then you may have blocked the web-page from displaying. To display the documentation materials please select **YES** to display the non-secure items after you click the Travel and Expenses link. Alternatively, you can also obtain the documentation materials from the Project website:

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



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HD1. Are HDR students able to access the ESS Travel System?

If the HDR student has a staff number, then a travel request may be entered into the system for them.

Many HDR students have a staff number if they are receiving a Scholarship or are employed casually by the University.

Some HDR students have access to ESS while others do not. It depends on how the HDR student's computing access was set up by the Faculty/Division.

If the HDR student does not have ESS access, however has a staff ID, then an administrator may enter the travel request on the student's behalf. We do not recommend requesting ESS access for the student simply to enter their own travel request. The cost of granting and administering ESS access, will probably outweigh the cost of someone else entering an ad hoc travel request for them.

If the HDR student has ESS access, they may enter their own travel request by using their authcate user name and password to access ESS.

If the HDR student is receiving a scholarship then their default cost centre is most likely a Q cost centre such as Q05003. It is important to **change** the cost centre to one within your school/dept else the travel request will not workflow.

If the HDR student does not know their staff ID number or authcate username and password, please contact ***HR inquiries (ext 20400)*.**

If the HDR student does not have a staff ID, it can be applied for using an "Application for staff ID (unpaid staff) form. Remember to use the category Monash Affiliate for a HDR student.

The form is available from the HR website: *http://adm.monash.edu/human-resources/forms/id-card.pdf*.

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HD2. Can any other student lodge a travel request in the ESS Travel System?

Only if the student has a staff ID then an administrator can lodge a travel request on their behalf.

However, if the student is travelling for Monash purposes, then typically they would be accompanied by a Monash staff member. This staff member can make a note in the “Description of Activity/s” field in their travel request that there are accompanying students. Then as an attachment to the staff member’s travel request, list the names, student ID, and contact information for each student who is accompanying them on the trip. A suggestion for the filename is: [accompanying students]. Monash, therefore, will be able to contact the staff member and students in the event of an emergency.

If the student is not travelling with a staff member, and is travelling for Monash business purposes, then you could consider requesting a staff ID (unpaid staff) for the student so you may enter a travel request on their behalf. Please note, this is not mandatory because the scope of the ESS Travel System currently covers staff, HDR students, adjuncts and contractors.

Please see the HR website for an “Application for staff ID (unpaid staff)” *http://adm.monash.edu/human-resources/forms/id-card.pdf*. Please use the category Monash Affiliate for a student.

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HD3. Can I enter a trip retrospectively?

Yes, you can enter a trip retrospectively. However, we strongly recommend entering a trip *before* you travel because the information is used to help locate you in the event of an emergency.

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CR-AI1. When I click Create Travel Request the system says I am blocked by myself or by another user.

Only one user can create a travel request for an individual at the one time.

If a travel administrator in your department is blocking you, contact them and ask them to log out so you can log in.

If you are blocking yourself, it is likely that you were logged in earlier and your ESS session was unexpectedly closed without logging out. The system stills sees you as logged in for about 30 minutes. If you do not wish to wait, contact Corporate Business Systems staff who might be able to delete the lock. Please contact ***The IT Service Desk on 51777 and select option 2 for the SAP Service Desk.***

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CR-AI2. The system has timed out on me before I completed my travel request. I have lost all my data.

ESS times out after 30 minutes of inactivity. ESS also maintains your personal, pay and banking information, so timeouts are a necessity to protect your security.

Since travel is also located in ESS, it is better to have an outline of your travel itinerary and contact information at hand before starting your travel request. For example, the system may time out on you while you are searching the net for contact and/or accommodation information.

An alternative is to complete basic data in the mandatory fields (red asterisks fields) then save your request. For example, on one line of the Contact at Destination, say TBA (to be advised); and in the travel diary, say "in transit" for each day. After saving, you can continue to add the finer detail to your travel request via **My Trips > Change**. This way you can incrementally make changes to your request without losing your data. The key is to have the mandatory fields completed then you can **Save** and make changes later.

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CR-S1. The system is showing the dates in US format: MM/DD/YYYY, why can't travel use the EN format?

The travel system uses EN format for dates. It is your browser (Firefox or Safari) that is changing the dates to US format. This is because the locale US was used when Firefox or Safari was installed on your PC. To change the locale in Firefox you would need to install the **Quick Locale Switcher** add-on (**Firefox > Tools > Add ons > Get Add ons**). After installing the add-on, you need to configure it (click **Extensions > Options**) by selecting the AU language and deselecting the non-used languages. If you are successful, you should see a small Australian (or English) flag on the bottom right of your Firefox screen. Please contact your local IT support for further assistance.

We are not aware of any locale switcher add-ons for Safari. Please contact your local IT support to install the EN version of the Safari browser not the US version.

Alternatively, you can accept the date default as MM/DD/YYYY or use Internet Explorer whose default locale is EN.

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CR-S2. The system does not add up the total days correctly.

The system does calculate the days correctly.

The system calculates your total trip days from the start date and end date of your trip. The system counts the start date and end date inclusively. For example, if you start on the 1 July at 11.59 p.m. and finish on the 5 July at 12.01 a.m, the system will count 5 days. Please note that your start and finish times are not used to calculate total trip days.

As a tip, if you have a long trip and you do not want to manually count the total trip days, just click the **Confirm** button after entering the start and end date of your trip and the system will default the total trip days. You can then do the breakdown between personal leave and business days. After you have finished completing the Trip Summary section, please click **Confirm** again to copy the data to the lower sections.

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CR-D1. I click the Destination button but it doesn't do anything.

Please check the trip start and end dates and the first destination arrive and depart dates. If they are identical, the system does not anticipate a second destination. You probably need to change the depart date of your first destination. Also, scroll to the top of the screen and see if there are any unresolved error messages.

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CR-D2. After entering a second destination, I can't see it.

Second destination data is located in a table behind the **Add Destination** button. If you click **Add Destination** again, you will see your second and subsequent destinations there.

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CR-D3. I entered a second destination and the travel diary duplicates the day that I arrive at the second destination.

We configured the system to repeat the day of any additional destination (2nd, 3rd, 4th destination, etc.,) because it is possible to visit multiple countries or cities on a single day; particularly when travelling in Europe. If the repeated day is not necessary (i.e. you travelled to your next destination overnight), you can simply delete it by highlighting the row and clicking **Delete**.

Before you delete, however, make sure you select the right duplicate row.

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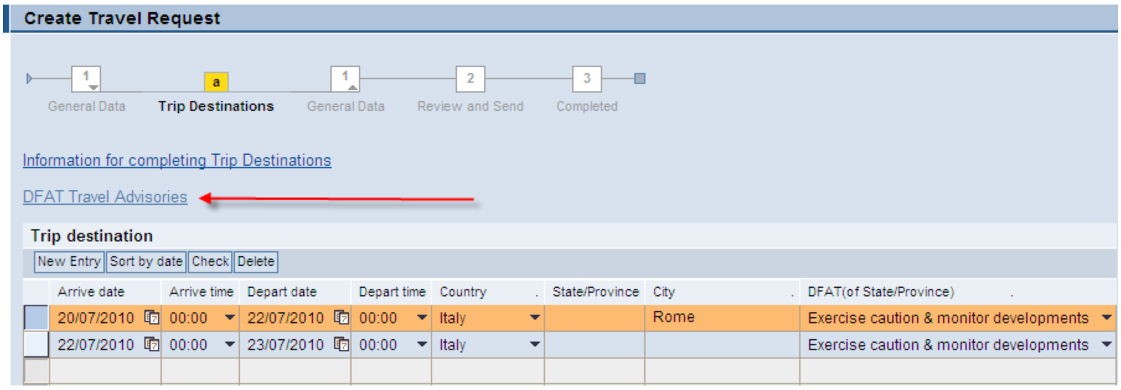
CR-D4. I can't see the DFAT Travel Advisories for the second destination.

The DFAT Travel Advisory in the **Add Destination** table is at the top of the table.



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CR-D5. I have entered multiple destinations, travel diary, multiple accommodation and multiple contacts. How can I see that I entered all the data?

The SAP Travel Management system is different than BusEco's TMS system in that some data is located in tables behind buttons; for example, there is a travel diary table sitting behind the **Travel Diary** button. The reason for this is to reduce the length of the ESS screen. If all information was presented from top down, the screen would be cumbersome to scroll through.

To see the data you have entered, simply click on the button again to reveal the underlying table. For example, clicking on the **Travel Diary** button will reveal the Travel Diary table.

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CR-TD1. In the Travel Diary, I cannot see the relevant activity in the list.

There are around 30 different activities so you may not see the full list. Use the scroll bar just on the right of the Activities to scroll through the list. If your activity is not there, select **Any other activity**.

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CR-TD2. In the Travel Diary, I get the following error message: Start time is later than Finish time.

The system uses a 24 hour clock. If you start at 9 and finish at 5, then the start and finish times should be 09:00 and 17:00, respectively. Please check your entry.

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CR-TD3. I accidentally deleted the wrong row in the travel diary.

- You can either click the **New Entry** button and enter it again, or click the **Previous Step** button, and go back into the travel diary. It will regenerate again.

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CR-TD4. I keep getting the error message that institution and activity are required entry fields, however, I have completed every line.

It is possible that you are creating a trip with a long duration and not all lines are displayed in first screen of the travel diary table. To check this, the bottom of the travel diary says **Row # of #;** for example, Row 1 of 10. If your trip is 11 days, then row 11 is on the next screen. To move to the next screen, click the down arrow at the bottom of the travel diary table, alternatively, change the row number. For example, change 1 to 11 to display from row 11.

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CR-TD5. It is time-consuming to use the drop down list to select the times and/or activity.

Start typing the first few characters and the system will default to that entry. For example, if you require a start time of 09:00, then type 09 (in quick succession), and the time 09:00 will then default.

For the activity, you can type the first letter, for example C to go to all activities that begin with a C. If you keep pressing C the system will cycle through all of the C activities. Alternatively, you can type the first couple of characters of the activity. It is a matter of trial and error to see what works best for you.

Please note that the auto-propose always works if you use Internet Explorer to access ESS. It may not work on some versions of the Mozilla and Safari browsers.

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CR-TD6. My school undertakes lengthy field trips and its too time consuming to include the institution/conference name on every line when we are on location.

We have relaxed the requirement to enter an institution/conference for each day of a field trip. You only need to enter the institution details once in the travel diary.

For example, you could enter something like "Field trip to Fox Glacier 1-15 March" on the first line of the travel diary (in the institution field), then leave the remaining institution fields blank. Please note you still need to select the activity for each day.

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CR-TD7. Can I change the country in my travel diary?

You cannot change the country to one that is not included as a destination in the Destinations section of the travel request.

In the **Destinations** section, you must include every destination country where you are leaving the airport (i.e. no need to include stop-overs where you are just transiting through the airport). If you need to add a second destination, you change the depart date of your first destination, then you click the **Add Destinations** button.

Please see the step-by-step example of creating a complex trip on the R-H side of the Travel and Expenses main page for more detailed instructions

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CR-TD8. Can I change the city in my travel diary?

If you are travelling to multiple cities in the one country, then there are two choices for completing the travel diary:

Alternative 1. You include only one travel destination in your **Destinations** section. For example, you are travelling to China and visiting the cities of Tongzhou, Beijing and Haidian, then you could include China Tongzhou in your Destinations section. You then can change the relevant cities to Beijing and Haidian in your travel diary.

Alternative 2. You could declare the three destinations in your **Destinations** section (China: Tongzhou, China: Beijing and China: Haidian) and then you won't need to change the cities in the travel diary.

Alternative 1 is useful for short trips while Alternative 2 is more efficient for long trips. The reason is that you only need to declare each destination once, while you may need to make multiple changes to your travel diary.

It is your call which method you find the most convenient.

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CR-TD9. Do I need to complete the travel diary for trips more than 30 days or for domestic trips less than 6 days?

For travel >30 days and all domestic trips <6 days, the 'online' travel diary is **not** mandatory. Please note that a travel diary must still be completed for ATO purposes for all international trips and domestic trips >5 days.

If you intend not to complete the online diary, then while creating a travel request you just need to click the **travel diary** button and then click **Accept**. For long trips (>30 days) it may be more efficient to attach a manually prepared travel diary that groups the days. If you intend to attach a travel diary for trips >30 days, then type "see attached" in the institution field of the first line of the travel diary, then accept the remaining blank diary.

Of course, you can complete the online diary for trips >30 days; it's your choice which method you find most convenient.

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CR-CD1. Do I have to complete every line of the Destination Contacts table?

You do not need to complete every line of the **Destination Contacts** table. If the contact is the same for each day at a particular institution, then just complete the first line of that institution (the contact is implicit for the remaining days). If you have a detailed contact itinerary as a Word or PDF document, then write "see attached" in the first line and add a character to the phone number field (say *); then attach your contact information later. If you have only a few contacts to add, then better to complete the details online.

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CR-A1. It is time-consuming to enter all accommodation information.

You can attach the accommodation information as a PDF, then type "see attached" in the accommodation name field. Attach the accommodation itinerary later when you Save your work or from the "**Display Trips and Attachments**" service. Alternatively, you can type the accommodation in. Use the method that is the most convenient for you.

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CR-EC1. Can I enter different currencies when entering estimated costs?

No. The costs are estimates only and are not posted to any cost centre/fund. Only when the actual costs are settled they are posted to the cost centre fund. If paid for by corporate credit card, for example, the bank would do the conversion.

So there is no need to specify a foreign currency amount, just roughly work out what the AU equivalent is and enter the amount in AUD. This online currency converter might be useful: *http://www.xe.com/ucc/*

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CR-CA1. Can I change the cost centre/s after a trip has been approved?

No. The cost centre only drives who receives the request for approval. There is no posting of the estimated cost in financial accounting. When travel expenses are settled (say via a corporate credit card or claim form) this is when the actual cost of the trip is allocated to cost centres/funds. So it is unlikely that it is necessary to change the cost distribution of estimated costs in the travel request, because you will have the opportunity to determine the distribution when actual travel costs are settled.

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CR-CA2. Can I change the cost centre before a trip is approved?

Yes. Any fields in the travel request can be changed until the status of your travel request (you can see the status in My Trips) is **approver-approved**. You can change the cost centre, or a travel administrator can change it for you.

Please note that when your travel request is approved, only the travel diary, accommodation and contacts can be changed in the Edit/Finalise Travel Diary service.

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CR-TC1. I am in the Travel Management Company section and the system hangs.

It is possible that you have an error message on the screen. Scroll to the top of the screen and check for any system messages.

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CR-TC2. What happens if I choose a non-strategic supplier for travel?

Sometimes the use of HRG Australia or Voyager Travel is not practical, such as when an external organisation is funding the fare, a HDR student can get a cheaper fare, or the traveller is funding the trip themselves. However, Monash uses their travel agents to help locate staff in the event of an emergency. If you are *not* booking with HRG or Voyager then please specify the travel agent's name and attach their itinerary to your travel request. This way we can locate your flight details if necessary.

Sometimes staff choose not to use HRG or Voyager for other reasons. It is useful for Monash to know the other reasons so they can better negotiate their contracts with their existing travel suppliers. So if you have another reason (than above) for not using Monash's strategic travel suppliers, then please choose "other reason" from the reasons list. Please provide details of the 'other' reason in the free-text field; also include the name of the other travel agent and attach their itinerary to your travel request. This helps to locate you in the event of an emergency.

Please note that Strategic Procurement can run an SAP report of use of strategic suppliers and this report is useful for them to gauge acceptance of their nominated suppliers.

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CR-G1. When I click the Review button, the system does not allow me to review the data that I have entered.

Review is actually performing a validation of the data you have entered. You need to check your data for accuracy/completeness before you click **Review**.

Alternatively, after clicking **Review**:

1. **Save only** your trip.
2. Go to **Display trips and attachments > Display Trip Requests** service to check your data entry.
3. If you need to make any changes, go to **My Trips** and select **Change**
4. Choose **Save and Send** to start the workflow process again.

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CR-G2. The trip start and end dates are in the format MM/DD/YYYY.

ESS determines the date format from your computer's operating system. Go to your PC's **Control Panel** and select **Regional and Language Options**. Ensure **English (Australia)** is selected.

If you are using Mozilla Firefox to access ESS, please note that the default locale for Mozilla is US irrespective of your operating system's regional language settings. To change Mozilla's default locale, you need to install the '*quick locale switcher*' add on (please see CR-S1). Alternatively, we recommend using Internet Explorer, if you prefer the date in DD/MM/YYYY format and you don't want to go to the effort of installing an add-in to your browser.

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CR-G3. **The steps on the top of the screen are messed up.**

This happens with the **Mozilla Firefox browser.** ESS is more compatible with Internet Explorer than other browser programs. You can still use Mozilla Firefox to create a travel request (or perform any ESS travel management task), only the 1,2,3 steps may be displayed over two lines (as per above), the dates will be in US format MM/DD/YYYY and the system may not auto-propose the field as you commence typing; nonetheless, the actual processing of the transaction is handled the same.

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CR-G4. How do I know where my travel request is at?

Go to **My trips** and review the **Workflow status** column. The workflow status column shows the last agent who had processed the request. For example, Travel admin - checked means that the last person to process the request was the travel administrator. The documentation materials on the right hand side of the ESS screen outline the various workflow indicators and their meaning.
Further, the system will send you emails notifying you of the outcome as each person processes your request. For example, if your travel administrator has checked your request, the system will send you an email advising you that the request has been checked and is now with the travel approver.

There is also an SAP report **ZF9P** called "Where is my workflow". Travel administrators and Corporate Credit Card Processors in your department/school will have access to run this report. The **ZF9P** report tells you who has the workflow in their workflow's inbox.

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CR-G5. Can Travel Checkers see if a trip in their ESS Workflow inbox that has been approved?

No, once a travel request has been approved or checked, it will be removed from your ESS workflow's inbox.

However, in ESS Travel and Expenses, you can use the switch person function and switch to the traveller. Then review the traveller's request in "**Display Trip and Attachments**".

Also, we have two reports for Administrative staff to monitor travel requests:
ZF9P - **Where is my workflow** will let you know who is currently holding the travel request.
ZF9F - **General Trip data** displays all information about the trip and also the trip attachments. This report also tells you who last processed the request and/or who approved the request.

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CR-G6. Do travellers get acknowledgment (e.g. email) when their trips are approved?

Yes. Travellers receive an email when their trip is checked and also an email when their trip is approved. Also, the traveller can check the status of their trip in **My Trips – Workflow status** column.

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CR-G7. How can I determine whether my travel request has been rejected?

Travellers receive an email when their trip is rejected. Also, if you go to **My Trips** and review the **Workflow status** column, you will see whether the trip has been rejected. The status "Travel Admin – rejected" means that the travel administrator rejected your request. The status "Approver – rejected" means that your travel approver rejected your request; alternatively DVC (GE) – rejected means that the DVC (GE) rejected a high-risk travel request. In all cases, the rejection email will specify *who* rejected your request and the reason/s why.

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CR-G8. Will my travel request be saved if I click Confirm button after each section?

No. Confirm transfers any necessary data to the next section. However, Confirm does **not** save your work. To Save, you need to click **Review** on the bottom of the Create Travel Request page, then click either **Save only** or **Save and Send**.

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CR-G9. How can I save my travel request before it is completed?

To save a travel request, the mandatory fields (marked with a red asterisk) must be completed.

To quickly Save a travel request you can complete only the mandatory fields as follows:

1. Complete the red asterisk fields only
2. Click **Travel Diary** button and enter **in transit** for every day. Note that if the trip is > 30 days or is a domestic trip <6 days, then you do not need to complete anything in the travel diary. Click **Accept** for the travel diary
3. Click **Add Destination Contact** button and then click **Accept** (do not enter any data)
4. Choose either HRG or Voyager in the Travel Management Co section
5. On the bottom of the travel request page, click **Review**
6. On the next page select **Save only**
7. The system will Save your work and propose a trip number
8. From here you can go directly to **Change Travel Request**
9. Alternatively, return to the Travel and Expenses main page and select **My Trips** > **Change**

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CR-G10. Can I delete a travel request?

No, you cannot delete a travel request after it has been entered. If the trip has not been approved, change the City to "**trip deleted**" and the overall description of the trip to "**trip deleted**".

If the trip has been approved, go to **Edit, Finalise Travel Diary, Accommodation and Contacts**, then select **Edit and/or Finalise Travel Diary**. Change the overall description of trip to "**trip cancelled**" and change each activity in the travel diary to "**trip was cancelled**" (this is the last activity in the drop-down list).

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CR-G11. Do I need to complete an application for conference leave in ESS?

No, it is unlikely that you will need to do this. The travel system produces many reports which will tell the Department who is away and for how long. Please check with your Department whether they are using any Conference Leave reports. If they are not, then there is no benefit in also completing a conference leave application in ESS.

Please be aware that there is no official leave type for Conference Leave. Conference leave forms were only completed for the Faculty/Division's reporting purposes.

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CR-G12. My trip has been sent to my supervisor as high risk however I am travelling to a low risk country.

Please see WF3.

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CR-CV1. I cannot see the cash advance option in the travel request.

We have temporarily switched cash advances off while we do more testing of this function. You can complete a paper-based cash advance form as per the current procedure for claiming cash advances. Please contact Corporate Finance Division (Disbursements), if you have any queries about the manual cash advance process.

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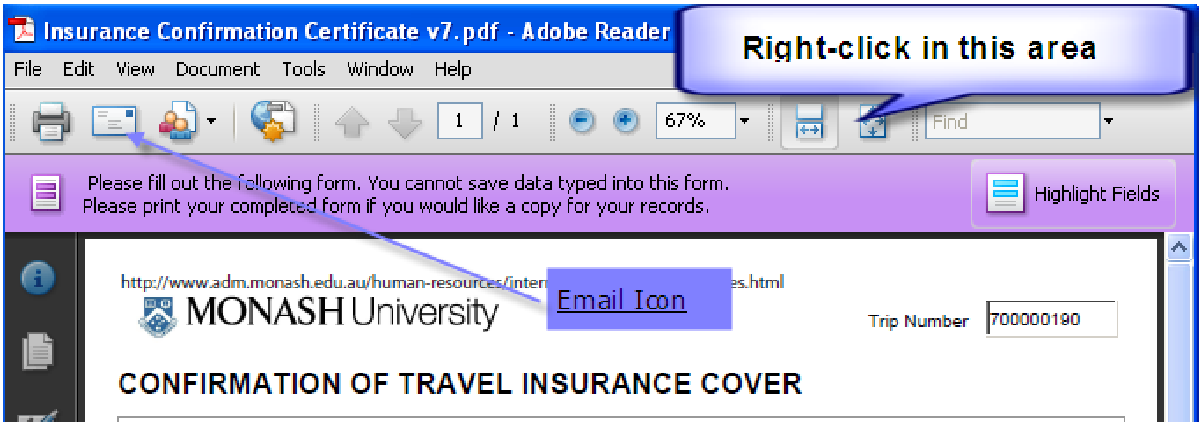
CR-AF1. I cannot see the email icon in the Travel Request Summary form (or any other Travel form).

Right click on the **Adobe toolbar**, click **More tools** then select **Email**.

Please note that if the Adobe email icon launches another email program other than the one you normally use, please ask your IT support to change your *default* mail program. The default drives the mail program that automatically launches whenever you click an email link.



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CR-AF2. I am using a Mac computer and I cannot print my insurance certificate, travel diary or contacts.

There are four alternatives for resolving the Mac > Adobe > Mozilla Firefox integration issue.

1. If you have dual operating system software on your Mac (such as VM Fusion) then run your Mac in Windows mode and access ESS Travel and Expenses via Windows.

2. Use the Safari browser as it is more compatible with the forms

3. If using Firefox, install a plug in on your Mac which will enable Adobe forms while in Mac mode. Please see: **Mac Instructions**

   www.adm.monash.edu.au/procserv/travel/system/resources/mac-user-instructions.pdf

4. See your departmental travel administrator who will be able to use the 'travel switch person' function to obtain your Adobe documents for you.

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CR-AF3. When I click the Display form button, nothing happens. Also the same problem for the Insurance Confirmation Certificate and Business Travel Diary.

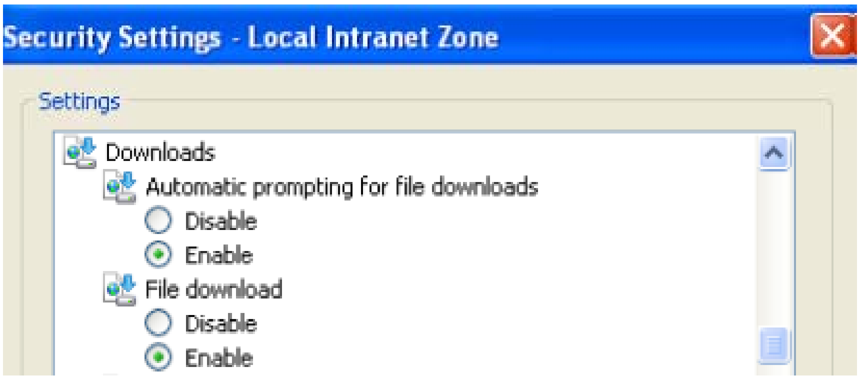
There are three things that may be preventing your form from loading:

1. You are using Internet Explorer and file downloads are disabled
2. Your web browser has the pop-up blocker turned on
3. Your Adobe program preferences are not allowing the PDF to display in the browser window.

1. Enabling File Downloads in Internet Explorer

Internet Explorer

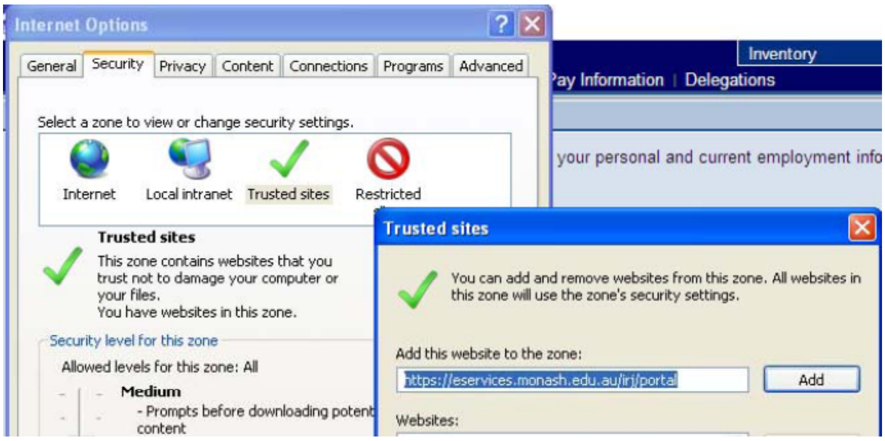
If you are using *Internet Explorer*, go to **Tools > Internet Options > Security > Custom Level** and then enable **File downloads**



2. Enabling pop-ups in your Web browser

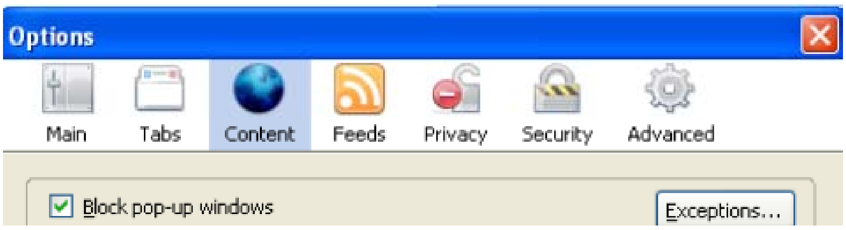
Internet Explorer

If you are using *Internet Explorer*, go to **Tools > Internet Options > Security > Trusted Sites**. Click **Sites** and add **https://eservices.monash.edu.au**

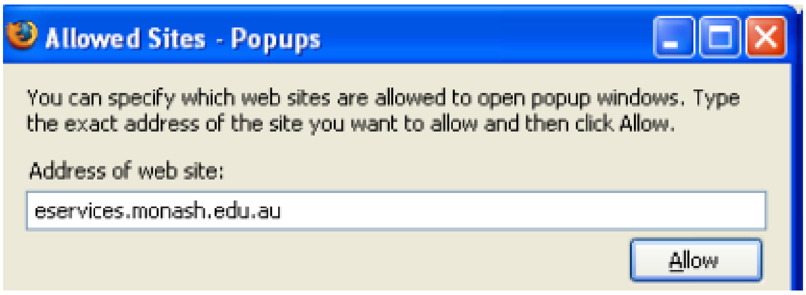


Mozilla

If you are using *Mozilla*, go to **Tools > Options > Content** and click the **Exceptions** button next to Block pop up windows (see below)



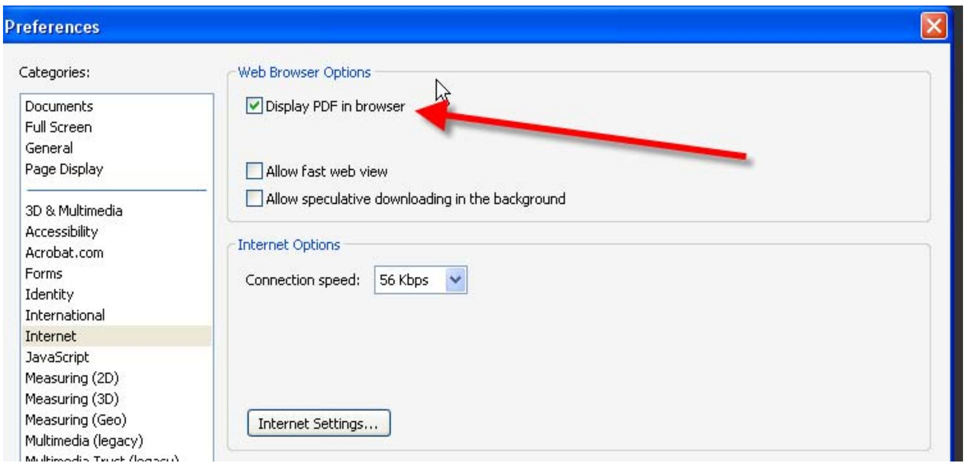
Then enter the following in the Address of web site field and click **Allow**



3. **Enabling PDFs to open in your Browser**

If enabling file downloads and unblocking pop-ups has not resolved your problem, you can check the PDF browser settings in your Adobe program. If you have more than one copy of Adobe on your computer (say Adobe Reader and Adobe Acrobat) you must change the settings in the program that opens your PDF documents. Alternatively, you can change the settings in all Adobe programs. To do this:

- Open the relevant Adobe program
- Choose **Edit > Preferences > Internet**
- Ensure that **Display PDF in browser** is switched on



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IC1. When will the Insurance Certificate be issued?

The travel insurance certificate will automatically be emailed to the traveller when their travel request is approved. Also, after it has been approved it will appear in the "Generate Insurance Confirmation Certificate" service. Those with a switch person role can obtain a copy of the certificate from there.

Please note that the Certificate will appear in the "Generate Insurance Confirmation Certificate" service for 30 days *after* the end-date of the trip. If the traveller requires a copy of the Insurance Certificate 30 days after their trip return date, they should contact the Monash Insurance Office:

mailto:insurance.request@monash.edu

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IC2. What is the procedure for lodging a claim on travel insurance?

The travel insurance certificate contains a link to the claim form and insurer contact details. In the first instance, please contact the travel insurer for advice. If you have any further queries, you may also contact the ***Monash Insurance Office mailto:insurance.request@monash.edu (ext 56368)***.

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IC3. **My trip dates have changed, how can I change my Insurance Confirmation Certificate?**

You may up **+/- 7 days** to an approved trip without affecting the workflow of your trip. The process is: (1) Change the dates of your trip and (2) Regenerate your Insurance Certificate.

To change the dates of your trip:

- Go to **ESS Travel and Expenses > Edit, Finalise Travel Diary Accommodation and Contacts**
- Select **Edit and/or Finalise** button.
- Click **New Entry** to add any new rows (dates) to your travel diary.
- Remember to **Sort** your travel diary afterwards.

To regenerate your insurance certificate

- Go to **ESS Travel and Expenses >Travel Insurance Confirmation Certificate**
- Select your trip then click **Print Insurance Certificate**
- The certificate will be issued with the new dates.

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IC4. The Insurance Confirmation Certificate will not open.

Please see CR-AF2 and CR-AF3.

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MT1. After I have entered a travel request, what changes can be made to it?

Before a trip is approved, you can change anything via the service **My Trips > Change**. Remember to select **Save and Send** if you want your request to go back into workflow after your changes. If you select Save only, the travel request will remain with you.

After a trip is approved, you need to go to the **Edit, Finalise Travel Diary** service to make changes to your trip. In Edit, Finalise Travel Diary you can only change the overall description of the trip, the travel diary, accommodation and destination contacts.

Making changes in the Edit, Finalise Travel Diary service does not affect the workflow of your trip. You can continue to update your information without your request having to go through a re-approval process.

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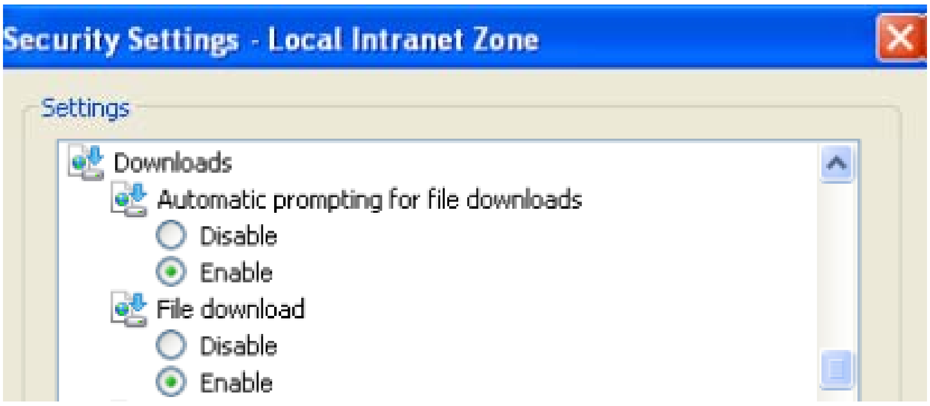
DT1. When I click on one of my attachments, the system hangs and the attachment does not load.

We have only seen this problem in Internet Explorer. It is due to the settings in IE for the download of files.

If you are using Internet Explorer, go to **Tools** > **Internet Options** > **Security** > **Custom Level** and then enable **File downloads**.



If the above did not work, you may need to restart your Internet Explorer browser and try again.

If you are not using Internet Explorer, please call ***The IT Service Desk on 51777 and select option 2 for the SAP Service Desk.***

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DT2. Will the workflow start again after adding an attachment to a travel request?

Whenever someone clicks Change or Reject in processing a travel request in ESS Workflow, the workflow goes back to the traveller**.**

Adding an attachment to a travel request, does **NOT** start the workflow again. It will need to be restarted by going to **My Trips > Change > Review > Save and Send.**

Please note, if you do not restart the workflow process, the travel request will remain with you and will **NOT** be sent for approval.

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DT3. I forgot to add attachments upon saving my request.

You can add attachments after saving your trip. If you miss adding an attachment upon saving your request:

- Go to **Display Trips and Attachments**
- Find your trip in the list and select the row button next to the trip number (your trip should be highlighted orange)
- Click **Add Attachment**
- Click **Browse** to locate the file
- Click **Upload Attachment**
- Click **Back** when you are finished

Please note that your attachment will be visible for the next person who processes your travel request. For example, if you add an attachment *after* your travel request has been checked by an administrator, then the travel approver will be able to see your attachment when they open your request in workflow.

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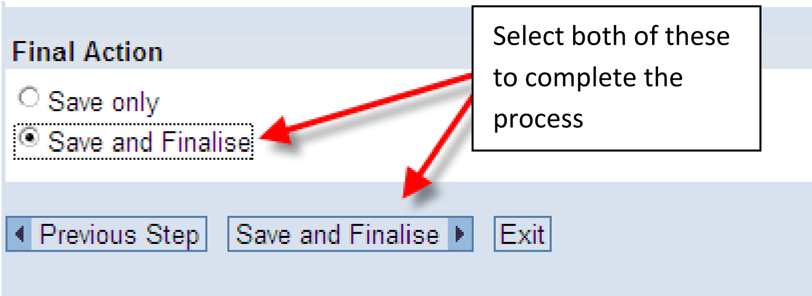
EF1. My trip was cancelled after it had been approved, however, I get email reminders to finalise my travel diary.

The status of your travel diary needs to be changed to "Finalised" in order to stop the email reminders.

- Go to **Edit, Finalise Travel Diary, Accommodation and Contacts**
- Select your trip (it should be highlighted orange)
- Click **Edit and/or Finalise** button to open your travel diary
- Change each trip activity to "**Trip was cancelled**".
- Change the overall trip description to "**Trip Cancelled**."
- On the bottom of the screen, click **Review**
- Choose **Save and Finalise** radio button
- Click the **Save and Finalise** rectangle button to complete the task.



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EF2. The duration of my trip was long (i.e. more than 30 days). Do I need to maintain my travel diary on a daily basis?

No. You can attach a manually prepared travel diary to your trip once the duration is more than 30 days. Once a trip reaches 31 days, the activity and institution fields become non-mandatory.

- Go to **ESS Travel and Expenses** > **Edit, Finalise Travel Diary**
- Enter "Manual travel diary attached" in the institution field of the first line of the travel diary
- Accept all other **defaulted travel diary** data
- On the bottom of the page, select **Review**
- Select **Save and Finalise** to set the status of your travel diary to finalised.
- You can then **attach a manual travel diary** to your trip via clicking **Add Attachment** in the **Edit, Finalise Travel Diary** service, or via the **Display Trips and Attachments** service.
- Alternatively, you can use the electronically proposed travel diary and maintain it on a daily basis.

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EF3. **I cannot see my trip in Edit/Finalise Travel diary.**

Only approved trips will appear in Edit/Finalise travel diary. If your trip has been approved and it is not there, change the **Display trip from end date** to an earlier date, then click **Display**.

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EF4. I spent a long time entering/changing data in my travel diary and now my work has been lost.

In the Edit, Finalise Travel Diary service, you need to click **Review** on the bottom of the page, then click either **Save and Finalise** or **Save only**. If you do not complete these steps, your work will be lost.

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EF5. Can I change the start/return date for a trip that has been approved?

Once a trip has been approved the dates cannot be changed from **My Trips**. However, you can change the start/return date in the travel diary in **Edit/Finalise Travel Diary**. We have set the system to allow a traveller to change their travel dates by **+/- 7 days** in the travel diary.

Please note that the trip will not re-workflow for approval if the dates have been changed by +/- 7 days. Please see IC3 for detailed instructions.

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EF6. Can the Travel Administrator change my travel diary on my behalf?

Yes. The travel administrator uses the Switch Person function to do this. Please check with your travel administrator.

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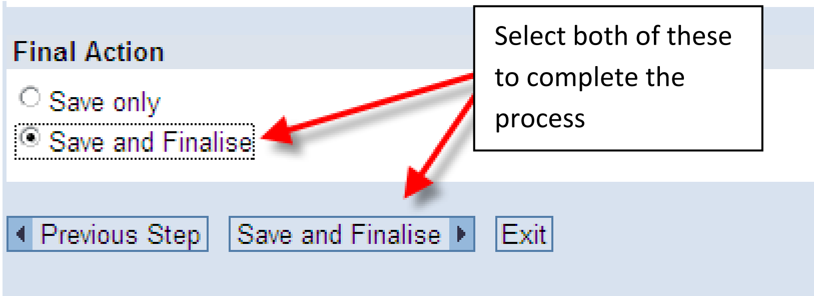
EF7. I am certain that I finalised my travel diary, however, the status says "Awaiting Finalisation" and I am still receiving reminders to complete my travel diary.

It is possible that you have gone to the Edit, Finalise Travel Diary, Accommodation and Contacts service and clicked **Confirm** in the travel diary. The Confirm button validates your data however it does not save your data. Alternatively, you selected the Save and Finalise radio button, but did not complete the Save process by clicking the Save and Finalise (rectangle) button. To **save** your data:

- Go to **Edit, Finalise Travel Diary, Accommodation and Contacts**
- Select your trip (it should be highlighted orange)
- Click **Edit and/or Finalise** button to open your travel diary
- Review your travel diary to see if any changes are required
- On the bottom of the screen, click **Review**
- Choose **Save and Finalise** radio button
- Click the **Save and Finalise** button to complete the task.



- To check that the status of the travel diary has changed, go back to **Edit, Finalise Travel Diary, Accommodation and Contacts** service and you will see the status in the far right column "**Finalised**".

Detailed documentation on how to finalise a travel diary are on the right-hand side of the ESS Travel and Expenses page or in the online resources.

http://www.adm.monash.edu.au/ias/ess/online-learning/course-6/tms1/tms1_topic6_travel_diary.html

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EF8. I cannot see the Save and Finalise option in the travel diary. I can only see a Save option.

Travel administrators cannot use the Switch Person function to finalise a traveller's travel diary. Travel administrators can make changes to a travel diary, however, the traveller must finalise their own travel diary. This is because the process of finalisation in ESS replaces the process of the traveller signing a paper-based copy of their travel diary to confirm it is an accurate reflection of their trip.

Process: If the travel diary has been completed by an administrator, then the traveller need only to:

- Go to the **Edit, Finalise Travel Diary, Accommodation and Contacts** service
- Select the trip to be finalised (it should be highlighted orange)
- Click **Edit and/or Finalise**
- Click **Review** on the bottom of the page,
- Select the Save and Finalise radio button
- Click **Save and Finalise**.

The above should only take a couple of minutes.

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EF9. Can staff hand in a paper-based travel diary?

Yes, however, it will need to be attached to the online travel request and the traveller will still need to go through the process of finalising their travel diary post-trip. Please see EF2 and EF7 for more detailed instructions.

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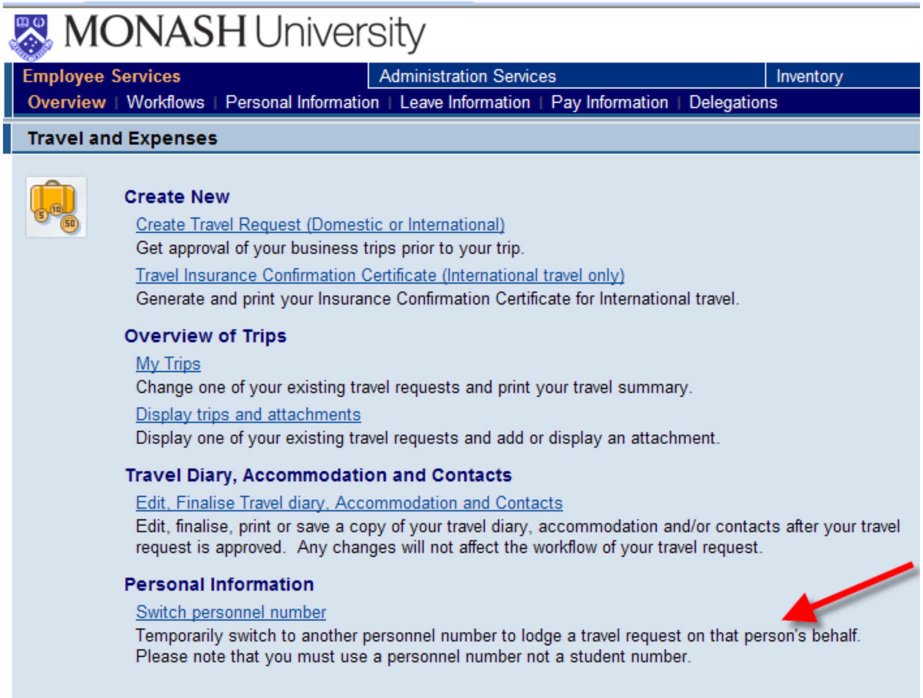
SP1. There is no Switch Person function in my Travel & Expenses menu.

The Switch Person function, if you have a travel co-ordinator role, should be listed on the Travel & Expenses menu within ESS



If you cannot see the switch person function, it may be because:

- You have recently changed position (position number). SAP/ESS access is set on position not the person.
- We have not yet set that up for you, which can be easily rectified. Please contact ***the IT Service Desk on 51777 and select option 2 for the SAP Service Desk.***

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WF1. When I click on a workflow in my workflow's inbox, it does nothing.

Your browser pop-up blocker is blocking the workflow window from opening. Please see the instructions for **Enabling Pop-ups** in the 'Create Travel Request – Adobe Form' section (CR-AF3).

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WF2. I can only see a high-level summary of the travel request in my workflow's inbox.

Double-click on the item in your workflow inbox to open the trip summary. From the trip summary, click the **Display Trip** button to display all details entered for the trip.

Please note that if the workflow does not open, your browser pop-up blocker is probably blocking it. Please see CR-AF3 for details on enabling pop-ups.

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WF3. A low risk travel request was work-flowed to the HOD for approval as a high-risk request.

If the traveller selects "**no travel advisory exists**", then the request may be treated conservatively as a high-risk travel request. DFAT issues travel advisories for most, but not all, countries. Be careful not to confuse DFAT's lowest risk level "be alert to own security" with "no travel advisory exists". No travel advisory exists applies when DFAT has not assessed that particular country. Whenever the traveller chooses "no travel advisory exists" they will be prompted by the system to review their entry (see system message below) before proceeding. If they ignore the warning, the request will flow into the high-risk process.

- If the travel request has been treated as high-risk in error, the traveller can change the DFAT level. Go to **My Trips** and select **Change**. Click **Add Destinations** button and ensure that the DFAT Advisory is changed for EVERY incorrect destination.
- Remember to click **Review** on the bottom of the Travel Request page then **Save and Send** to return the travel request into the correct workflow process.
- Alternatively, some travel administrators can change a travel request on behalf of someone else.
- Please note that when a travel request is changed the workflow begins again, therefore it will be removed from the HOD's workflow inbox.

System message:

DFAT No Travel Advisory Warning

You have selected "No travel advisory exists" for at least one of your travel destinations. No travel advisory exists should only be used if the Australian Government has not assessed the travel risk of this particular country. For countries that have not been assessed, your travel request will be conservatively treated as high-risk and a notification will be sent to your Dean or Divisional Director that high-risk travel is proposed. Please check the DFAT advisory of the country/s you are travelling to before proceeding. Use the Previous Step button on this page to go back to your travel request. Click Add Destination to check the DFAT Advisory of all your destinations. There is a weblink to the DFAT Travel Advisories on the top of the Destination table.

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WF4. **A workflow disappeared from my workflow's inbox; however, I had not processed it.**

Someone else has processed the workflow (i.e. another approver or administrator) or the travel request has been changed by the traveller (or travel administrator) however the traveller (or travel administrator) has not selected **Save and Send.**
You can use SAP report **ZF9F – General Trip Data** to confirm what stage the travel request is at. Alternatively, **ZF9P – Where is my workflow** will let you know who currently has the travel request.

Whenever a travel request is changed, the workflow begins again. It is important to select **Save and Send** when changing a travel request.

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WF5. Why didn't my travel request Save?

The likely reasons are that the required entry fields were not completed, there was an unresolved error in the travel request, or you did not click **Review** then **Save and Send** (or Save only) in the travel request.

Error messages appear at the top of the travel request screen. The traveller needs to fix any errors, click **Review**, and then click **Save and Send**.

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WF6. A travel workflow was sent to someone who is on leave. How can I select a different approver after the request has been sent?

A travel workflow can be restarted by simulating a change to the travel request. To do this:

- Switch to the traveller's personnel number (or ask the traveller to complete this task)
- Go to **My Trips**
- Select the trip to be restarted (it should be highlighted orange)
- Click **Change** however no need to change anything
- On the bottom of the screen click **Review**
- Click **Save and Send**.
- The workflow will now restart and the request will be with the travel checker, if the cost centre has one. The checker then selects a different approver.

Please note that if the cost centre does not have a travel checker, and there are no alternative approvers, then please contact ***Corporate Business Systems (mailto:finance.systems@monash.edu)*** to set-up an alternative approver. Once an alternative approver is set-up, you can re-kick off the workflow using **My Trips > Change** (as per above).

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WF7. The HDD is travelling to a high risk country and he/she has received his/her own travel request in ESS workflow to process.

Each Faculty/Department nominates their own travel roles. It is likely that only one HDD role was nominated for that particular cost centre. Please check with your Finance Officer who has access to maintain the travel roles. They probably will need to add another HDD position to move your travel request to the Security Manager for further processing. When a new HDD is added, the workflow will need to be kicked off again. Please see WF6 for detailed instructions.

Please note that it is not essential to have a higher-level position than the Head of Department to act as alternative HDD; as all high-risk travel are approved by the DVC (Global Engagement) regardless. It would be useful to have the Dean's (or equivalent) signature on your Security/Safety plan so that the DVC (GE) is aware that your high-risk travel is supported in your Faculty/Division.

If you have any concerns about your department's travel roles, please contact ***The IT Service Desk on 51777 and select option 2 for the SAP Service Desk.***

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WF8. How does a high risk travel request workflow?

High-risk travel requests first flow to the person who has been nominated to process high-risk travel in your department. Typically this is the Head of Department/Division (we call the position HDD in our SAP travel roles table).

After the HDD supports the travel, the request will automatically workflow to the University's Security Manager for a risk recommendation. Once the Security Manager makes his/her recommendation, the travel request is workflowed to the DVC (Global Engagement) to approve the risk.

If the request is approved by the DVC (GE) then it will come back to the department for the usual processing of travel requests. That is, it may be sent to a travel administrator for checking and then to an approver for approval of the cost of expenditure, absence, and so on.

Please note that the HDD workflow is not based on organizational structure, however, based on nomination. The travel roles are maintained in an SAP table, and the Faculties/Divisions have access to maintain their own travel roles. If you have any queries about your travel roles, please contact your Faculty/Division Finance Manager in the first instance. If you still have a query, please contact ***The IT Service Desk on 51777 and select option 2 for the SAP Service Desk.***

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WF9. I need to change the travel approvers/checkers in my department.

The travel roles are maintained in an SAP table, and the Faculties/Divisions have access to maintain their own travel roles. If you have any queries about your travel roles, please contact your Faculty/Division Finance Manager in the first instance. If you still have any queries, please contact ***The IT Service Desk on 51777 and select option 2 for the SAP Service Desk.***

Please note that after any travel role has been changed, all new travel requests will workflow using the new travel role structure. Any existing travel requests that have been sent into workflow (saved and sent) will use the old structure. You can send any existing travel requests into the new workflow by kicking off the workflow again. **My Trips > Change > Review > Save and Send** will restart any workflow (please see WF6).

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WF10. The travel request did not go to the right travel checker/approver.

Travel roles are based on cost centre where travel approvers and travel checkers are nominated for each Monash cost centre. Each Faculty/Division nominates and maintains their own travel roles.

First check who is holding the travel request via **ZF9P** – Where is my workflow. Second run SAP report **ZF9F** to determine what cost centre was used when creating the travel request. It is possible that the wrong cost centre was entered, thereby sending the travel request into a different workflow process.

If the wrong cost centre was used in the travel request, it can be changed then the workflow restarted again. Please see WF6 for more information on how to change a travel request, however remember to change the cost centre.

If you believe the travel roles set-up is incorrect, then please confirm the set-up with your Finance Officer. They can make a change to the SAP Travel roles table and the workflow can be restarted again to utilise the new set-up (please see WF9).

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WF11. How do I know where my travel request is at? (see CR-G4).

Please see CR-G4.

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WF12. I cannot open an attachment in the travel request (see DT1)

Please see DT1.

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