

UNSW SERKO® ONLINE

TRAVEL ALLOWANCES

Web Address: <https://unsw.serko.travel/Login/unsw>

WHEN TO USE 'TRAVEL ALLOWANCES'

Where travel has been booked or recorded in Serko® and a Travel allowance is applicable, i.e. calculating the travel allowance due, seeking approval for the travel allowance and requesting a travel allowance payment.

Note: -

The UNSW Tab must be completed in order for your travel to be approved.

Serko® Online will only calculate Travel Allowances if the Traveller has a Serko® Traveller Profile.

If the Travel allowance option is not available, your School/ Department has requested to have this function switched off, an allowance will need to be claimed using the TR2 Application for a Travel allowance form by following the link below.

https://www.fin.unsw.edu.au/files/forms/trav/TR2_Travel_Allowance_Form.pdf

BOOKING ACTIONS

Once a booking has been successfully created in Serko® Online; OR
The Consultant has actioned a booking request; then

The 'UNSW' tab will be displayed allowing the Travel Booker to enter the information pertinent to Travel Allowances and to calculate the allowances due.

From within the booking, select the 'UNSW' tab to access Travel Allowances.

Booking Actions

! Outstanding Tasks

1. Complete the Personal Travel section on the [UNSW](#) tab
2. Enter a Reason for Travel on the [UNSW](#) tab
3. Enter Special Studies Program status on the [UNSW](#) tab

ITINERARY

ADDITIONAL DATA

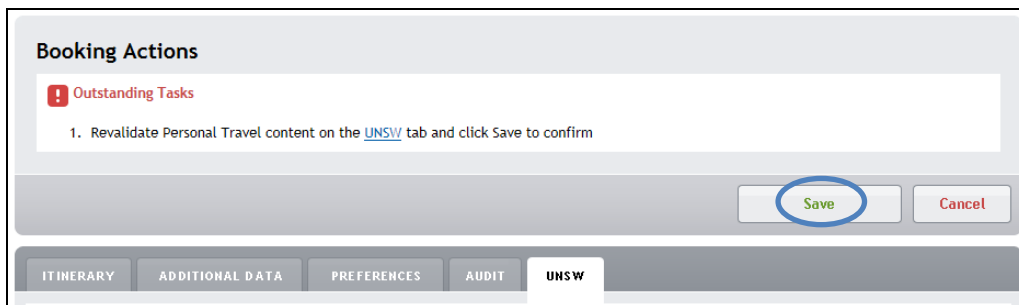
PREFERENCES

AUDIT

UNSW

BOOKING ACTIONS CONT.

When a booking is changed you will be required to revalidate Travel Allowance details.

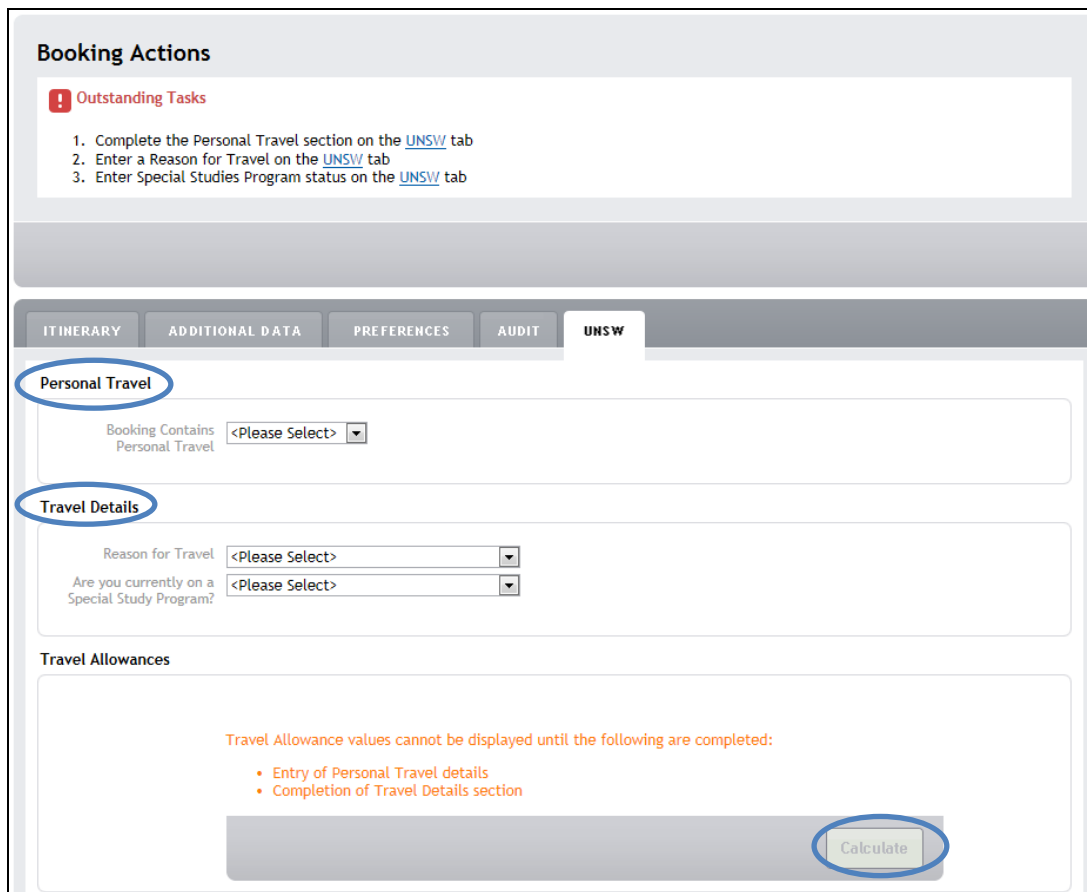


TRAVEL INFORMATION

Complete Personal Travel field.
Note:- If the booking contains any Personal Travel you will be required to enter Dates and Times of Personal Travel.

Complete Travel Details fields.
Note:- If the Reason for Travel is Conference/Seminar/Function/Event or 'Training & Development' you will be required to enter 'Dates' and 'Meals Included' with the conference/training.

Select 'Calculate'. (The calculated Travel Allowances will be displayed)



CONFIRM VALUES

If required, adjust Travel Allowance values up to a maximum value of the calculated amount.

If an allowance is not required, please zero out the amounts in the Total Payable column.

If required, enter a Travel Advance amount.

Travel Allowances

Travel Allowance values have been calculated, and results are displayed below. The payable values shown can be adjusted as required, up to a maximum value of the calculated amount. If changes are made, click Save to retain the updated values and notify the authorisor that changes have been made.

Meals	Date	Breakfast Rate	Lunch Rate	Dinner Rate	Calculated	Total Payable
	Sat 14 Jul 2012	25.70	36.40	51.00	113.10	113.10
	Sun 15 Jul 2012	25.70	36.40	51.00	113.10	113.10
	Mon 16 Jul 2012	25.70	36.40	51.00	113.10	113.10
	Tue 17 Jul 2012	25.70	36.40	51.00	113.10	113.10
	Wed 18 Jul 2012	25.70	36.40	51.00	113.10	113.10
	Thu 19 Jul 2012	25.70	36.40	51.00	113.10	113.10
	Fri 20 Jul 2012	25.70	36.40	51.00	113.10	113.10
	Sat 21 Jul 2012	25.70	36.40	0.00	62.10	62.10
	Total				853.80	853.80

Incidentals	Calculated	Total Payable
	4,258.69	4,258.69

Travel Advance	Comment	Total Payable
		0.00

Totals	Total Due
	5,112.49

Calculate

Save

Cancel

Select 'Save' to complete the process. The booking can now be authorised.

TRAVEL ALLOWANCES NOT CALCULATED

Travel Allowances will not be calculated under the following circumstances:-

- Reason for Travel = Externally Funded or No Travel Expenses
- Special Study Program = Yes
- Booking Duration is greater than 21 days
- Personal Travel Period(s)
- Reason for Travel = Conference, no Lunch allowance will be calculated for period of the conference.
- Reason for Travel = Conference and the Travel Booker has indicated Breakfast /Dinner is included on one or more conference days.

TRAVEL ALLOWANCE PAYMENT

Once a booking is authorised, no earlier than 5 days before departure, Serko® Online will automatically send a payment request to the Accounts Payable Department. This request will include all Meal and Incidental allowances; it will not include any Travel Advances. This process replaces the need to complete a TR2 Travel Allowance form and the need to enter Travel Allowances in NS Financials. When this payment request is made a record will be added to the bookings Audit Trail with words to the affect of:- 'A travel allowance voucher for [sum of allowances] has been submitted.'

If a Travel Advance is required, the TR3 Travel Cash Advance form must be completed; this form can be located at: https://www.fin.unsw.edu.au/secure/unsw_allstaff/Travel/TravelForms.html

When the Travel Advance is approved, this form should be sent to the Accounts Payment Department.

REMINDERS

Travel Allowances will remain as an 'Outstanding Task' on the booking until the Travel Allowances have been completed.

EMAIL REMINDER

When a booking is created an email will be sent to the Traveller and Travel Coordinator advising the booking has Outstanding Tasks.

Select the link within the email to complete Travel Allowance process.

Subject: Outstanding Tasks for Serko Online Booking 12032

Serko Online Booking Number 12032 has outstanding tasks that should be completed before any Authorisation emails can be sent out

Please view the list of tasks below:

- The Personal Travel content has not been identified
- Reason for Travel has not been identified
- Special Study Program status has not been identified

REMINDERS CONT.

LOGIN REMINDER

Where Travel Allowances have not been completed, a reminder will automatically be displayed upon Login with a list of bookings with Outstanding Tasks.

Outstanding Tasks
The following bookings have a task outstanding and require updating.

ID#	Traveller	Description	Contains	Travel From	Travel To	
12050	Mr Rob Test	SYD-MEL-SYD	✕	24 May 2012	25 May 2012	Update

Total bookings: 1

[Close](#)

HOME PAGE REMINDER

Where Travel Allowances have not been completed, a reminder will be displayed on the Travellers Home Page i.e. 'View bookings requiring your attention' link.

HOME | BOOKING | MY PROFILE | REPORTING | ADMIN | Tracey Test | Logout

Welcome, Tracey Test

Information

ID #	PNR	Travellers	Description	Contains	Travel From	Travel To	Status Type	Total
12491	67U66V	Mrs Tracey Test	SYD-MEL-SYD	✕	15 Jul 2012	22 Jul 2012		\$530.71

Total Bookings: 1

[View all your bookings \(1\)](#) [View bookings requiring your attention\(1\)](#)

[Make a Quick Booking](#) [Request Custom Booking](#)

Upon selecting the 'View bookings requiring your attention' link, a list of bookings with Outstanding Tasks will be displayed.

Select 'Update' to complete Travel Allowance process.

Outstanding Tasks
The following bookings have a task outstanding and require updating.

ID#	Traveller	Description	Contains	Travel From	Travel To	
12491	Mrs Tracey Test	SYD-MEL-SYD	✕	15 Jul 2012	22 Jul 2012	Update

Total bookings: 1

[Close](#)