

# UNSW SERKO® ONLINE

## BOOKINGS MADE OUTSIDE SERKO® ONLINE

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

### WHEN TO USE 'BOOKINGS MADE OUTSIDE SERKO® ONLINE'

Where travel has not been booked via one of the UNSW preferred Travel Management Companies (STA and Voyager) you are able to record the travel in Serko® Online for the following reasons-

- Travel Allowance Management where applicable, i.e. calculating the travel allowance due, seeking approval for the travel allowances and requesting a travel allowance payment.
- Travel Diary management, i.e. identifying when a Travel Diary is required and prompting the Traveller to file a Diary upon their return.
- Duty of Care, i.e. in case of an emergency, UNSW needs to know where to contact the traveller.

The process for recording travel will be through SERKO® Online Custom Booking functionality as outlined below.

### HOME PAGE

From the Home Page select 'Request Custom Booking'.

The screenshot shows the Serko Online Home Page for user Chris Test. The page has a navigation bar with 'HOME', 'BOOKING', and 'MY PROFILE' tabs. The main content area displays a welcome message and an 'Information' section with a table of bookings. The table has columns for ID #, PNR, Travellers, Description, Contains, Travel From, Travel To, Status Type, and Total. A single booking is listed with ID # 81, PNR YJFLRS, Travellers Mr Chris Test, Description SYD-BNE-SYD, and a total of \$1,368.63. Below the table, there are two buttons: 'Make a Quick Booking' and 'Request Custom Booking', with the latter circled in blue.

ID #	PNR	Travellers	Description	Contains	Travel From	Travel To	Status Type	Total
<a href="#">81</a>	<a href="#">YJFLRS</a>	Mr Chris Test	SYD-BNE-SYD		20 Mar 2012	24 Mar 2012		\$1,368.63

Total Bookings: 1

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

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

Bookings made outside Serko Online

### BOOKING DETAILS

Complete the Booking Details as required.

1. Your default School/Centre/Department and Travel Management Company from your profile will be displayed. This can be left at the default displayed.
2. At 'Consultant' select '**Non UNSW Preferred Travel Consultant**'.

Complete Custom Fields as required.

3. Allocation, Fund and Department will default to dummy codes, if you know the correct Fund and Default Codes please update, Leave allocation as 100.
4. At 'Will this booking be managed through a UNSW preferred travel agent?\*' select **No**.
5. At 'Reason' select a pre-defined Reason why you have booked through a non-preferred Travel Management Company.
6. At 'Total cost of Travel Arrangements' enter the total cost of travel arrangements.

Select 'Save Details'.

The screenshot shows the 'Booking Details' form with the following fields and values:

- Travellers\***: Ms Mary Training
- School/Centre /Dept\***: ----UNSW Foundation - TMC STA
- Consultant\***: Booking made outside UNSW Preferred Travel A
- Authoriser\***: Stacey McBurney(UNSWMcbSt0)
- Custom Fields**:
  - Allocation (%)\***: 100
  - Fund\***: AA111
  - Department\***: 1
  - Project**: (empty)
  - Purpose of Travel**: (empty)
  - Invoice recipient\***: Traveller and Travel Co-ordinator
  - Have you submitted relevant online leave forms (recreation/conference)?\***: Yes
  - I acknowledge that if the number of private days exceeds 40% of total, FBT may be payable\***: Accept
  - Will this booking be managed through a UNSW preferred travel agent?\***: No
  - Reason\***: Booking made through other travel agent
  - Total cost of Travel Arrangements\***: 1000.00

At the bottom, the **Save Details** button is highlighted with a blue circle.

## ADD FLIGHT DETAILS

Select '+Flight' from the Itinerary box.

Enter required flight details.

### Domestic Flights

- For the first flight sector, the default departure time of (Any) must be changed to reflect the 'actual' *departure* time.
- For all remaining flight sectors, the default departure time of (Any) must be changed to reflect the 'actual' *arrive* time.

### International Flights

- For the first flight sector, the default departure time of 'Any' must be changed to reflect the 'actual' *arrive* time.
- For all remaining flight sectors, the default departure time of 'Any' must be changed to reflect the 'actual' *departure* time.

**If times are not entered, Travel Allowances cannot be calculated.**

Select 'Add Flight to Itinerary'. Flight details will be displayed in the Itinerary Box.

### Notes:

- Once the Flight details have been entered, they can be viewed / edited by clicking on the Flight line from the Itinerary box.
- Each flight needs to be entered separately by repeating the steps above (e.g. One for departure and another for the return flight)

The screenshot shows a web application interface for 'Custom Booking Request'. At the top, there are navigation tabs: HOME, BOOKING (selected), and MY PROFILE. The user is identified as 'Chris Test (Test0Chr0)' with a 'Logout' link. The main content area is divided into two sections. On the left is the 'Itinerary' box, which contains buttons for '+ Flight', '+ Car', '+ Hotel', and '+ Notes'. The '+ Flight' button is circled in blue. Below these buttons, it says 'You currently have no entries' and provides instructions on how to add booking details. At the bottom of the Itinerary box are 'Submit Booking Request' and 'Cancel' buttons. On the right is the 'Booking Details' section for 'Traveller(s): Mr Chris Test', with an 'Edit' button. Below this is the 'Flight' form, which includes fields for 'Depart\*' (dropdown menu with 'Select a City'), 'Arrive\*' (dropdown menu with 'Select a City'), 'Depart\*' (date field with '27 Jan 2012' and a calendar icon, followed by '(any)'), 'Airline' (dropdown menu with 'Select an Airline'), 'Flight Number' (text input), 'Class' (dropdown menu with 'Any (default)'), 'Alternative Fare Quote' (dropdown menu with 'Not required (default)'), and 'Special Instructions' (text input). At the bottom right of the Flight form, there is a green 'Add Flight to Itinerary' button circled in blue, and a red 'Cancel' button.

### ADD CAR DETAILS

Select '+Car' from the Itinerary box.

Enter required car details. Ensure Pick Up and Drop Off times are specified.

**Notes:**

- The default Pick-up time of (Any) must be changed to reflect the 'actual' Pick-up time.
- The default Drop-off time of (Any) must be changed to reflect the 'actual' Drop-off time.

If times are not entered, Travel Allowances cannot be calculated.

**Handy Hint:** At 'Associate Flight' field, select a Flight entry and the Pick Up and Drop Off details will default based on the flight details.

Select 'Add Car to Itinerary'. Car details will be displayed in the Itinerary Box.

**Note:** Once the Car details have been entered, they can be viewed / edited by clicking on the Car line from the Itinerary box.

The screenshot shows the 'Custom Booking Request' page for 'Mr Chris Test'. On the left, the 'Itinerary' panel shows two flight entries: 'Friday, 27 Jan 2012' (Sydney to Los Angeles) and 'Thursday, 9 Feb 2012' (Los Angeles to Sydney). The '+ Car' button is circled in blue. On the right, the 'Booking Details' panel shows the 'Car' section with fields for 'Associate Flight', 'Pick-up From', 'Pick-up Date/Time', 'Drop-off at', 'Drop-off Date/Time', 'Company', and 'Vehicle Type'. The 'Passengers' section shows 'Mr Chris Test' is selected. The 'Add Car to Itinerary' button is circled in blue.

## ADD HOTEL DETAILS

Select '+Hotel' from the Itinerary box.

Enter required hotel details.

**Notes:**

- The default Check-in time of (Any) must be changed to reflect the 'actual' Check-in time.
- The default Check-out time of (Any) must be changed to reflect the 'actual' Check-out time.

If times are not entered, Travel Allowances cannot be calculated.

**Handy Hint:** At 'Associate Flight' field, select a Flight entry and the Check-In and Check-Out details will default based on the flight details.

Select 'Add Hotel to Itinerary'. Hotel details will be displayed in the Itinerary Box.

**Note:** Once the Hotel details have been entered, they can be viewed / edited by clicking on the Hotel line from the Itinerary box.

The screenshot shows a web interface for a 'Custom Booking Request'. At the top, there are navigation tabs for 'HOME', 'BOOKING', and 'MY PROFILE', along with user information 'Chris Test (Test0Chri0)', 'Logout', and help icons. The main content area is titled 'Custom Booking Request' and includes a 'Back to Booking List' link. On the left, an 'Itinerary' box shows a list of items: '+ Flight', '+ Car', '+ Hotel' (circled in blue), and '+ Notes'. Below this, it states 'You have 2 flight(s), 1 car(s) and 0 hotel(s). To change, click on the entry title'. The itinerary items include: 'Friday, 27 Jan 2012' with 'Qantas Airways (QF) from Sydney (SYD) to Los Angeles (LAX)' and 'Avis Rent A Car System, Inc. ((any)) Pick-up Los Angeles (LAX) Drop-off Los Angeles (LAX)'; and 'Thursday, 9 Feb 2012' with 'Qantas Airways (QF) from Los Angeles (LAX) to Sydney (SYD)'. At the bottom of the itinerary box are 'Submit Booking Request' and 'Cancel' buttons. On the right, the 'Booking Details' section shows 'Traveller(s): Mr Chris Test' with an 'Edit' button. Below this is the 'Hotel' form with fields for: 'Associate Flight \*' (No Flight), 'City \*' (Select a City), 'Check-in Date \*' (27 Jan 2012, (any)), 'Check-out Date \*' (27 Jan 2012, (any)), 'Hotel' (Select a Hotel), 'Room Type \*' (Any Room Type), 'Rooms Required' (1), 'Guests' (checked, Mr Chris Test), and 'Special Instructions'. At the bottom of the form are 'Add Hotel to Itinerary' (circled in blue) and 'Cancel' buttons.

## ADD NOTES

Select '+Notes' from the Itinerary box.

Enter any additional information required for reference purposes only.

Select 'Add Note to Itinerary'. Notes details will be saved.

**Note:** Once the Note details have been entered, they can be viewed / edited by clicking on '+Notes' from the Itinerary box.

The screenshot displays the 'Custom Booking Request' page. At the top, there is a navigation bar with 'HOME', 'BOOKING', and 'MY PROFILE' tabs. The user is logged in as 'Chris Test (Test0Chri0)' and has a 'Logout' link. The main content area is titled 'Custom Booking Request' and includes a 'Back to Booking List' link. On the left, the 'Itinerary' section shows a summary of bookings: 2 flights, 1 car, and 1 hotel. The '+ Notes' button is circled in blue. The itinerary details are as follows:

- Friday, 27 Jan 2012**
  - Qantas Airways (QF) from Sydney (SYD) to Los Angeles (LAX)
  - Avis Rent A Car System, Inc. (any) Pick-up Los Angeles (LAX) Drop-off Los Angeles (LAX)
  - Chateau Marmont (Any Room Type) in Los Angeles (LAX) Check-out 9 Feb 2012
- Thursday, 9 Feb 2012**
  - Qantas Airways (QF) from Los Angeles (LAX) to Sydney (SYD)

At the bottom of the itinerary section are 'Submit Booking Request' and 'Cancel' buttons. On the right, the 'Booking Details' section shows 'Traveller(s): Mr Chris Test' and an 'Edit' button. Below this is a large 'Notes' text area. At the bottom right of the page, the 'Add Notes to Itinerary' button is circled in blue, along with a 'Cancel' button.

*Bookings made outside Serko Online*

### SUBMIT CUSTOM BOOKING

Once all itinerary sectors have been completed, select 'Submit Booking Request'.

**Note:** Upon submitting a Custom Booking Request, if a Date of Birth does not exist in your profile you may be required to enter details.

The screenshot shows a web interface for a 'Custom Booking Request'. At the top, there are navigation tabs for 'HOME', 'BOOKING', and 'MY PROFILE'. The user is logged in as 'Chris Test (Test0Chri0)'. The main content area is titled 'Custom Booking Request' and includes a 'Back to Booking List' link. On the left, there is an 'Itinerary' section with buttons for '+ Flight', '+ Car', '+ Hotel', and '+ Notes'. Below these buttons, it states 'You have 2 flight(s), 1 car(s) and 1 hotel(s). To change, click on the entry title'. The itinerary items are: 'Friday, 27 Jan 2012' with a flight from Sydney (SYD) to Los Angeles (LAX) on Qantas Airways (QF), a car rental from Avis, and a hotel at Chateau Marmont; and 'Thursday, 9 Feb 2012' with a flight from Los Angeles (LAX) to Sydney (SYD) on Qantas Airways (QF). At the bottom of the itinerary list, the 'Submit Booking Request' button is circled in blue. To the right of the itinerary is a 'Booking Details' section for 'Traveller(s): Mr Chris Test' with an 'Edit' button. Below that is an 'Itinerary Timeline' showing a calendar grid from Jan 27 to Feb 9. A grey box contains instructions: 'Use the buttons in your Itinerary to add flights, cars, hotels and notes. Click on an entry title to change it's detail. Finished? Once you are happy please submit your booking request.'

### BOOKING CREATED

The Custom Booking is successfully created.

**Notes:**

- No notification email is sent to the Traveller / Travel Booker.
- The status of the booking will be set to 'Pending'.

A confirmation dialog box titled 'Custom Booking' with the message 'Your Booking Request was successful' and 'BookingId #: 86'. At the bottom right, there is an 'Ok' button.

## COMPLETING THE UNSW TAB

**Note: -**

**Travel Allowances 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.**

## 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**

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)

ITINERARY   ADDITIONAL DATA   PREFERENCES   AUDIT   **UNSW**

**Personal Travel**

Booking Contains Personal Travel <Please Select>

**Travel Details**

Reason for Travel <Please Select>

Are you currently on a Special Study Program? <Please Select>

**Travel Allowances**

Travel Allowance values cannot be displayed until the following are completed:

- Entry of Personal Travel details
- Completion of Travel Details section

Calculate



**COMPLETING THE UNSW TAB cont....**

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
	<b>Total</b>				<b>853.80</b>	<b>853.80</b>

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.