Serko User Guide

Self-Service Online Booking Tool for Domestic Travel Requirements

powered by serko

1. WELCOME TO SERKO

1.1. Introduction

Serko is the University of South Australia's self-service online booking tool for domestic-only travel requirements. This includes:

- Air travel
- Hotel accommodation
- Car hire.

Over 90% of the University's domestic travel bookings can be made via Serko.

Serko can be used by eligible University staff. This includes all paid staff on continuing or fixed-term contracts.

1.2. Exceptions to Booking via Serko

Some trips cannot currently be self-booked through Serko:

- International travel (including Trans-Tasman)
- Six nights or greater (a travel diary is required)
- Multiple travellers (who want to sit together on the airplane)
- Personal payment (frequent flyer redemption, exit row or upgrades)
- Departure is less than 24 hours from the time of booking
- Hire of a commercial vehicle (utility or bus)
- Utilising a hotel chargeback or accessing a hotel conference rate.

If a trip contains one of more of these elements, simply complete a Business Travel Request ('BTR') form and the University's Travel Team will be happy to help you with your booking.

1.3. Approval

Serko is a live booking tool. There is no built-in approval workflow within Serko. The traveller is responsible for obtaining and retaining evidence of approval to travel from the relevant VCA holder(s) for each trip. The travel booker will be prompted to confirm receipt of such approval during the booking process.

Travellers are fully responsible for the bookings they make or request others to make on their behalf within Serko.

The University reserves the right to recoup unapproved or out-of-policy expenditure!

1.4. Business Travel Requests

As staff can complete the entire booking within Serko, there is no need to complete a BTR form when using Serko. However, use of Serko is optional and all travellers are still welcome to complete a BTR form if they would like the University's Travel Team to facilitate their domestic booking requirements.

Safe travels!

2.   LOGIN PAGE

2.1. Website Address

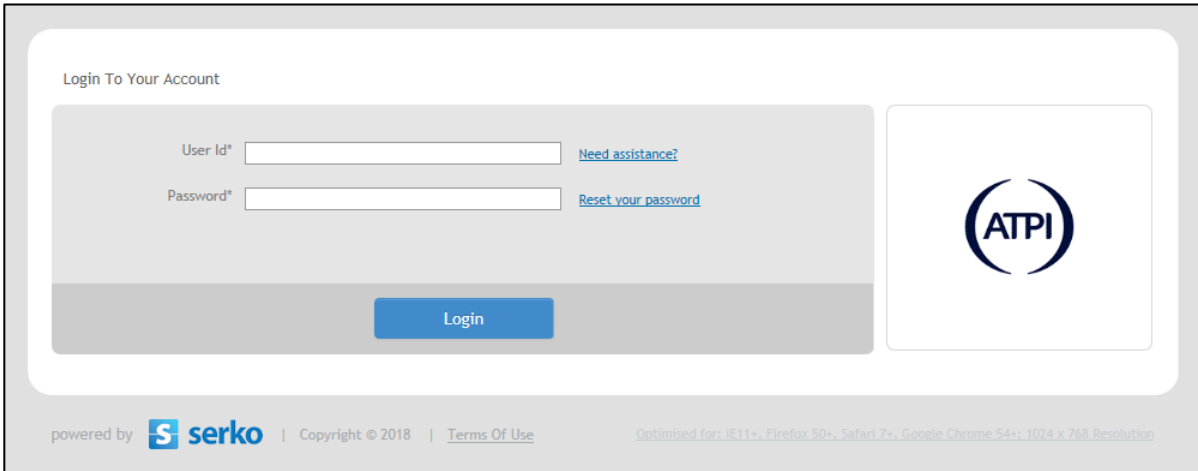You can access Serko using the following link: https://serkoonline.atpi.com/Login.aspx.

2.2. User ID and Password

To use Serko, you must first complete a profile within the University's Travel: Maintain Traveller Profile tool in Appian.

You should receive a welcome e-mail shortly after your traveller profile has been created. If you do not receive a welcome e-mail or need to request access to Serko, please contact the Travel Team (see section 2.4 below).

Login using the User ID provided within the welcome e-mail and follow the instructions to set-up your password.

Note: Your User ID is unique to you and your login details must not be shared with any other person.

2.3. Travel Coordinators

Certain University staff members have been nominated by their Executive Dean/Director of Research Institutes & Centres/Unit Director as a Travel Coordinator for their local area. A Travel Coordinator may be appointed to assist travellers within the 'ORG2' in which they have been nominated. The list of Travel Coordinators is maintained by the Travel Team. Once added by the Travel Team, the nominated Travel Coordinator will feature in the drop-down 'picker' in the traveller profile tool in Appian for all staff in the associated ORG2.

Travellers can appoint up to three Travel Coordinators from their local area (please see the Quick Guide for further information).

By selecting one or more Travel Coordinators, the traveller authorises those Travel Coordinators to:

a)   access and edit their traveller profile, which will include their emergency contact details, passport and visa information, airline and hotel memberships, and seating and meal preferences; and

b)   make a firm booking in the traveller's name within Serko.

Although nominated Travel Coordinators will be available within Appian to all staff in the same ORG2, **travellers should seek agreement from their local area before appointing a Travel Coordinator**.

If you wish to nominate a staff member or yourself as a Travel Coordinator, please contact the Travel Team (see section 2.4 below).

If you have been nominated as a Travel Coordinator, you must create your own traveller profile in Appian – *even if you do not travel yourself*. This is necessary to allow travellers to subsequently appoint you as their Travel Coordinator (if they have prior permission to do so) and to facilitate your access to Serko. You must **always log into Serko using your own User ID**, but will be able to administer bookings for all travellers that have appointed you as their Travel Coordinator.

2.4. Further Assistance

This User Guide provides detailed instructions on how to make, amend or cancel a travel booking. A separate Quick Guide explains how to create or amend your travel profile in Appian.

Should you require any additional information, please either:

a) refer to the University's Travel website;

b) call the Travel Team on 08 830 26430; or

c) e-mail travelteam@unisa.edu.au.

3. HOME PAGE

3.1. Home Page

Many of the sections under Notes contain important information relating to:

- The University's travel program
- The University's travel tools – Serko and Appian
- Generic advice and support applicable to all Serko users (not just UniSA)

3.2. Traveller Profile

It is each traveller's responsibility to ensure their traveller profile held in Appian is up to date . Failure to do so may result in a booking containing incorrect information. This could cause delays or inconvenience whilst travelling, or the traveller denied boarding onto a flight.

All costs arising from amendments or cancellations due to incorrect profiles will be charged to the traveller's cost centre.

If your details have changed since your last booking, the link will take you to Appian to review and update your details.

If you update a profile, you will need to log out and then back in to Serko for any profile changes to be reflected in Serko.

> **Notes**
> ☐ Traveller profile
> ───────────────────────────────
> To manage/update your profile information, please click here to access Appian

Note: Not all changes will be reflected in Serko immediately. Certain information may take up to eight working hours to appear in Serko (e.g. name changes and Travel Coordinators).

3.3. Bookings that CANNOT be completed in Serko

A limited number of bookings cannot be completed using Serko and must be booked via the Travel Team. These types of bookings are listed below:

> ☐ Bookings that CAN'T be completed in Serko
> ───────────────────────────────
> Over 90% of the University's eligible domestic trips can be booked via Serko
>
> However, there are a number of bookings that can't be booked online. These domestic trips include those that are:
>
> * 6 nights or greater (a travel diary is required)
> * Include any form of personal payment (spouse, partner, child, exit row upgrade, frequent flyer redemption or travel class upgrade)
> * Include accompanied travel (2 or more staff members travelling on the same flights who want to sit together)
> * That require use of a commercial vehicle (a ute, bus etc)
> * Due to depart in less than 24 hours from the time of booking
>
> If your trip contains 1 or more of these elements, simply complete a BTR and the Travel Team will be happy to support your booking in the traditional process. Please click here to access BTR.

3.4. Trip Assistance & Booking Errors

The use of Serko is not mandatory. Travellers are welcome to complete a Business Travel Request (BTR) form and the Travel Team will facilitate the required booking.

> ☐ Trip assistance & booking errors
> ───────────────────────────────
> If you require the Travel Team to make a booking on your behalf, please complete a BTR by clicking here. Should you need assistance with forming an itinerary (prior to completing the booking yourself), you can call the Travel Team during business hours on (08) 8302 6430.
>
> If you wish to make changes to an existing booking, please contact ATPI Voyager by calling 1800 335 395 or via email au.unisa@atpi.com
>
> If you receive an error message at any point during or at the completion of your booking, call the ATPI Voyager eCommerce Team on 1300 364 608 or email them the error message at au.ecommerce@atpi.com

3.5. ATPI Voyager Events Calendar

Serko is provided through the University's Travel Management Company ('TMC') for domestic travel, ATPI Voyager. The TMC provides and maintains a list of special events and festivals that may affect flight and accommodation availability in major cities and towns. Refer to this resource to best plan your upcoming travel.

> ☐ ❗ Events Calendar
>
> Please click here to view the calendar featuring events being held in all major Australian cities which will assist with your travel planning.

3.6. Insurance

All domestic travel taken on behalf of the University is subject to the University's Insurance policy. If in doubt, please contact the Insurance Team on 08 830 21678 or e-mail insurance@unisa.edu.au.

> ☐ Insurance
>
> All persons travelling on UniSA approved travel are covered by the University's corporate travel insurance policy, subject to the following conditions:
>
> • The journey does not exceed 180 days
> • Staff / PhD : personal travel does not exceed 50% of the total journey
> • Students (other than PhD) : have declared all personal travel to the Insurance Office; and/or
> • The traveller is not over 75 years of age
>
> Travellers will need to contact the UniSA Insurance Office on (08) 8302 1678 or insurance@unisa.edu.au to make additional arrangements if their circumstances differ from the above.

3.7. Health & Safety

This is a generic section that applies to all ATPI Voyager customers and cannot be removed.

As Serko is being used by the University for domestic travel only, this section does not apply. However, it is recommended that travellers periodically visit the Smartraveller website to ensure they are informed and prepared prior to undertaking any international travel.

> ☐ Health & safety
>
> All travellers are encouraged to visit the Smart Traveller website http://smartraveller.gov.au/Pages/default.aspx periodically to ensure they are informed and prepared prior to undertaking travel on behalf of the University.

3.8. eProfile (Do Not Use)

This is a generic section which applies to all ATPI Voyager customers and cannot be removed.

The University is using Appian to store and manage travellers' profiles, and to communicate the required information to the University's travel partners. Please do not amend a traveller's profile outside of Appian as this will not be reflected in Appian or communicated to other travel partners.

> ☐ eProfile
>
> **To manage your own travel profile, please use the below link to access ATPI eProfile application**
>
> URL: https://eprofile.atpi.com/commonlogin.aspx
>
> Email Address: John.Smith@atpi.com (example only)
>
> Password: Password123
>
> Once you have logged in, you will be prompted to change the password.

3.9. Serko Confirmation Number Not Received

If, after clicking the FINISH button at the end of the booking process, you do not receive a Serko confirmation number, contact the ATPI Voyager eCommerce Team using the details provided.

> ☐ If after clicking the FINISH button you do not receive a Serko confirmation number…
>
> If after clicking the FINISH button you do not receive a Serko confirmation number, please contact ATPI Voyager eCommerce Team as soon as possible prior to taking any further action on au.ecommerce@atpi.com or 1300 364 608.

3.10. Contact ATPI Voyager eCommerce Team

The contact details for the ATPI eCommerce Team can be found in this section and on your itinerary.

```
Contact ATPI Voyager eCommerce Team

ATPI Voyager eCommerce Team
        Email: au.ecommerce@atpi.com
        Phone: 1300 364 608
        Office Hours: Mon-Fri 0800-1800 (AEST) **Closed National Public Holidays**
        After Hours Bookings: 1300 551 225
```

3.11.   Passports, Visas, Warnings and Health

This is a generic section that applies to all ATPI Voyager customers and cannot be removed.

As Serko is being used by the University for domestic travel only, this section does not apply. The links provided here do not apply to the University's international travel requirements. For help with passports and visas, please contact the Travel Team (see section 2.4 above).

```
Passports, Visas, Warnings and Health

Please check all passport and visa requirements for international and trans tasman reservations prior to booking, or contact your dedicated ATPI
Voyager consultant for assistance.
            cibtvisas.com.au         Austn Govt Travel Advisory and Consular Advice         Vaccinations and Health
```
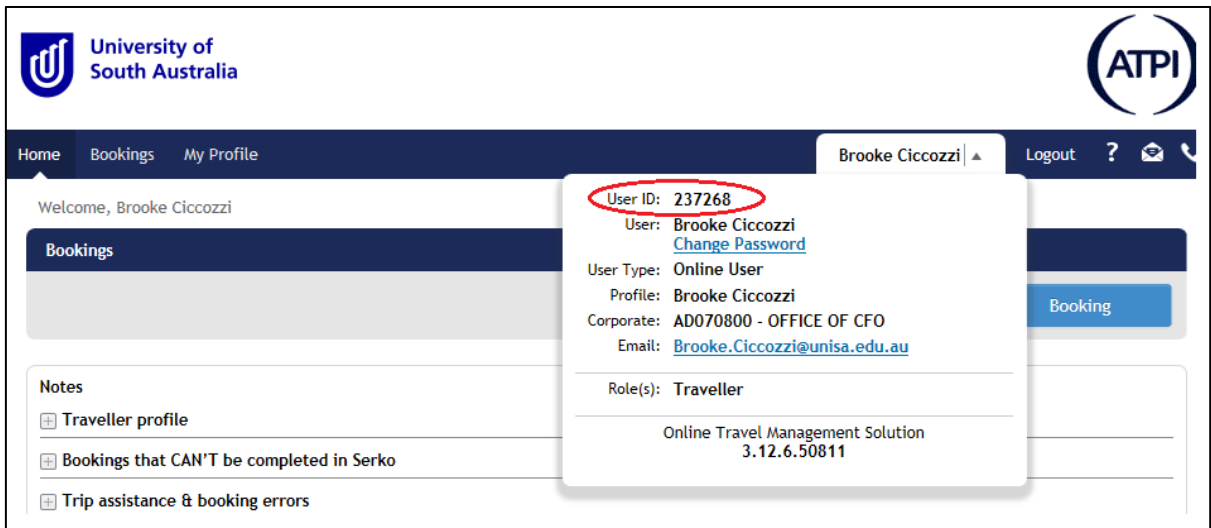
4. ADMINISTRATION

Several administrative tasks are actioned on the Home Page.

4.1. Locating Your Unique User ID

Click on your name in the upper right-hand corner of the screen and the pop-up window displays your Serko credentials. Your User ID will appear at the top.

4.2. Changing Your Serko Password

It is essential that you change your initial password to a unique password (and keep it confidential). Passwords must be a minimum of eight characters and include at least one uppercase letter, one lower case letter and one special character (e.g. a dollar sign or exclamation mark, however passwords cannot contain an underscore '_').

In the pop-up window, click on the hyperlink called 'Change Password' and you will be prompted to input your current and new password (twice) to amend your password.

It is recommended that you periodically change your password to enhance the security of your personal information and your booking capability.
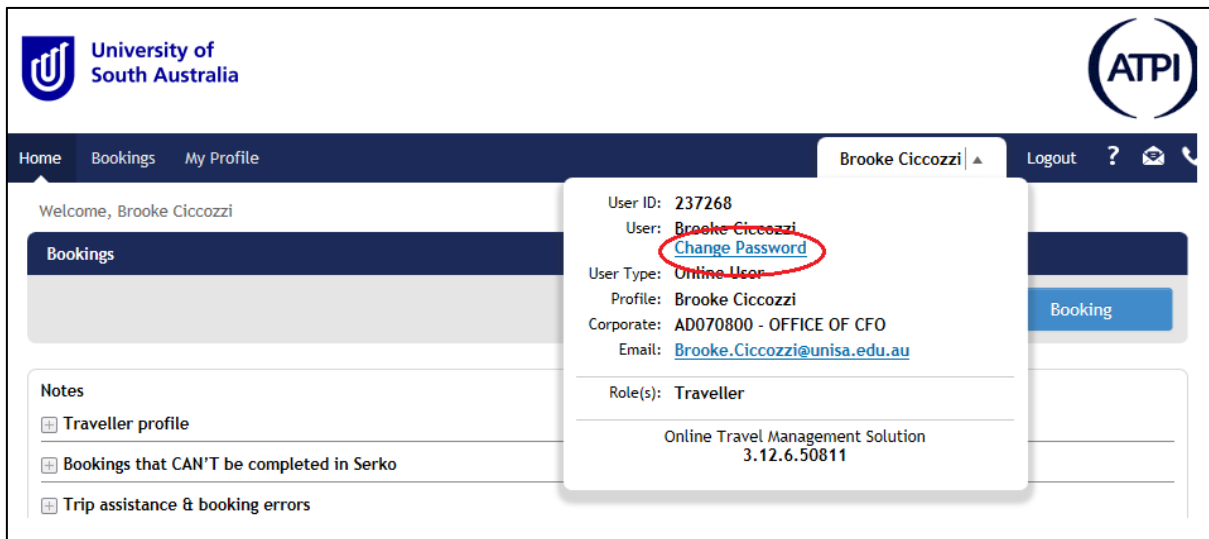
4.3. Determining the Default 'Home' Cost Centre

Serko pre-populates your default cost centre from your traveller profile in Appian. This is displayed in the pop-up window. The default cost centre should be set to the cost centre that normally funds your business travel. If your default cost centre needs to be amended, please update it in your traveller profile in Appian. Once completed this will be reflected in Serko.

Section 7.3 below describes how to specify an alternative cost centre if you wish to charge all (100%) of this booking to one cost centre other than your default cost centre.

Personal Development (PD) funds cannot be used as your default cost centre or specified at this stage of the booking process due to technical limitations in Serko. It is, however, possible to specify PD funds later in the booking process.

Section 11.7 below describes how to nominate up to two additional cost centres (to split the trip cost over two or three cost centres) – which may include PD funds – at the end of the booking process.
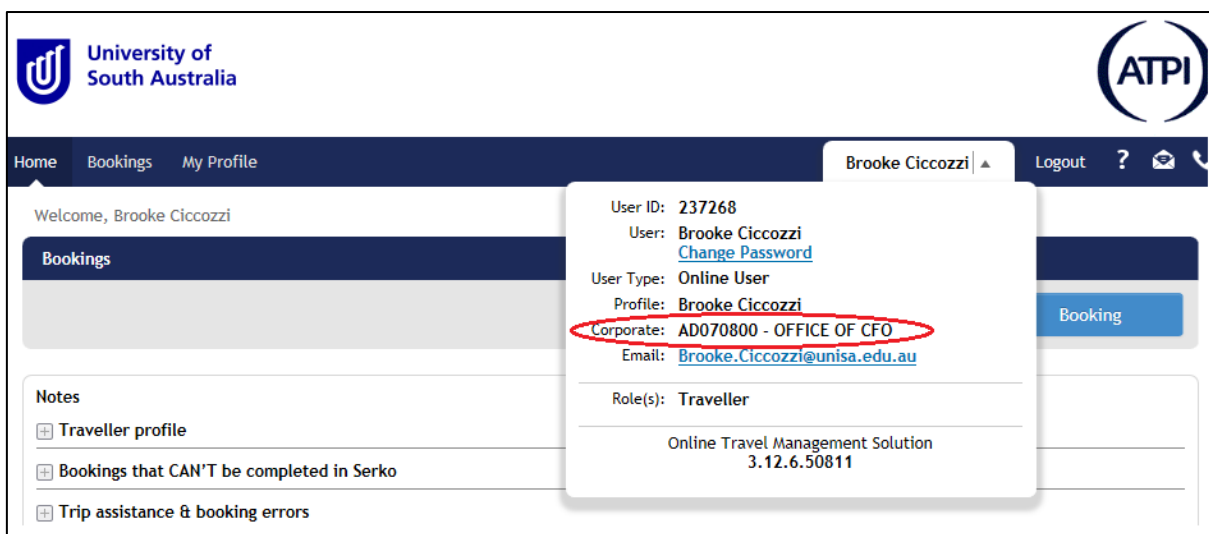
4.4. Serko Training Videos

Serko provides access to a comprehensive library of training videos on every aspect of the booking process. Access to the video library can be found by clicking on the question mark in the upper right-hand corner.
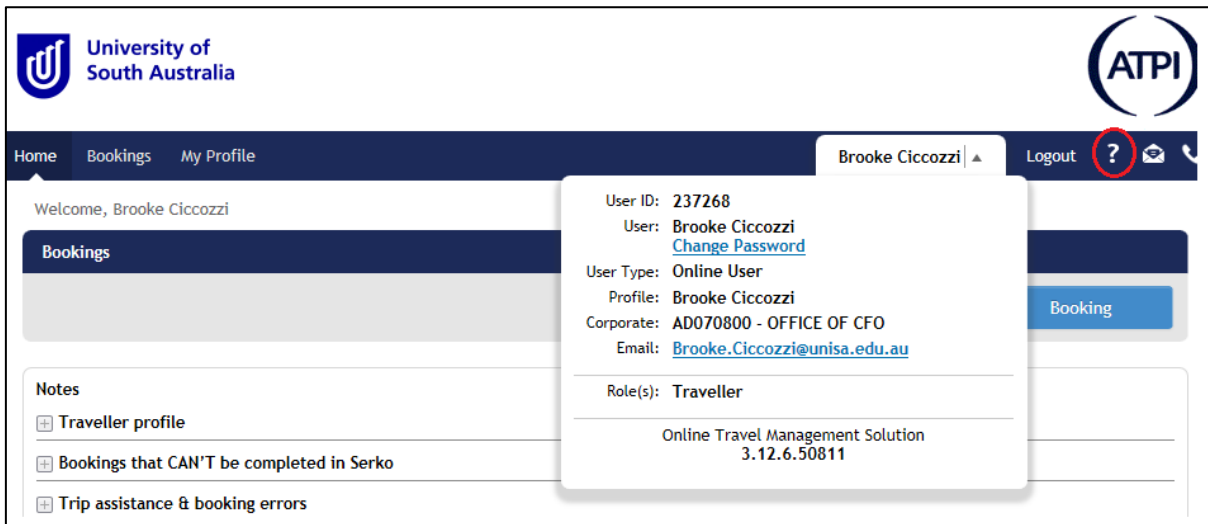
Note: The video library is generic and does not reflect the customisation that has been applied to the online booking tool for the University. For example, there will be no video showing how to book travel costs to a PD fund or how to complete the 'Additional Details' tab prior to completing a booking.

It is recommended that the video library be used for assistance when selecting trip content e.g. flights, accommodation or car hire rather than the administration.

4.5. Quick Phone and e-Mail Access to ATPI's eCommerce Team

Contact details for ATPI's eCommerce team can be found in the top right-hand corner of the home page. The eCommerce team should be contacted in the event of a technical query/issue regarding your booking, for example you didn't receive an itinerary, you couldn't complete your booking, you received an error message, etc.
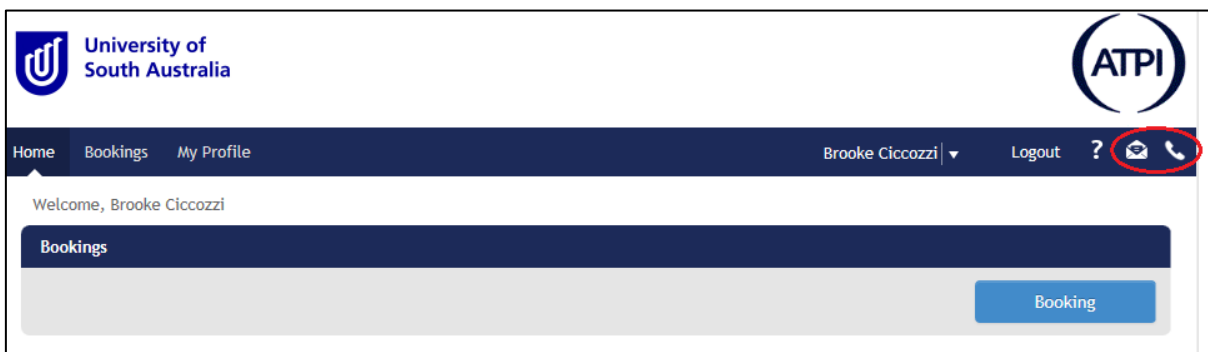
If you have a query about the booking process (including airlines, hotels, how to substitute to an alternative cost centre), please refer to the relevant section in this User Guide or contact the Travel Team (see section 2.4 above).

5. BOOKINGS PAGE

5.1. Historic Bookings

A history of your bookings is available on the 'Bookings' tab.

Click on either of the hyperlinks (in columns ID# or PNR) to access the relevant booking.
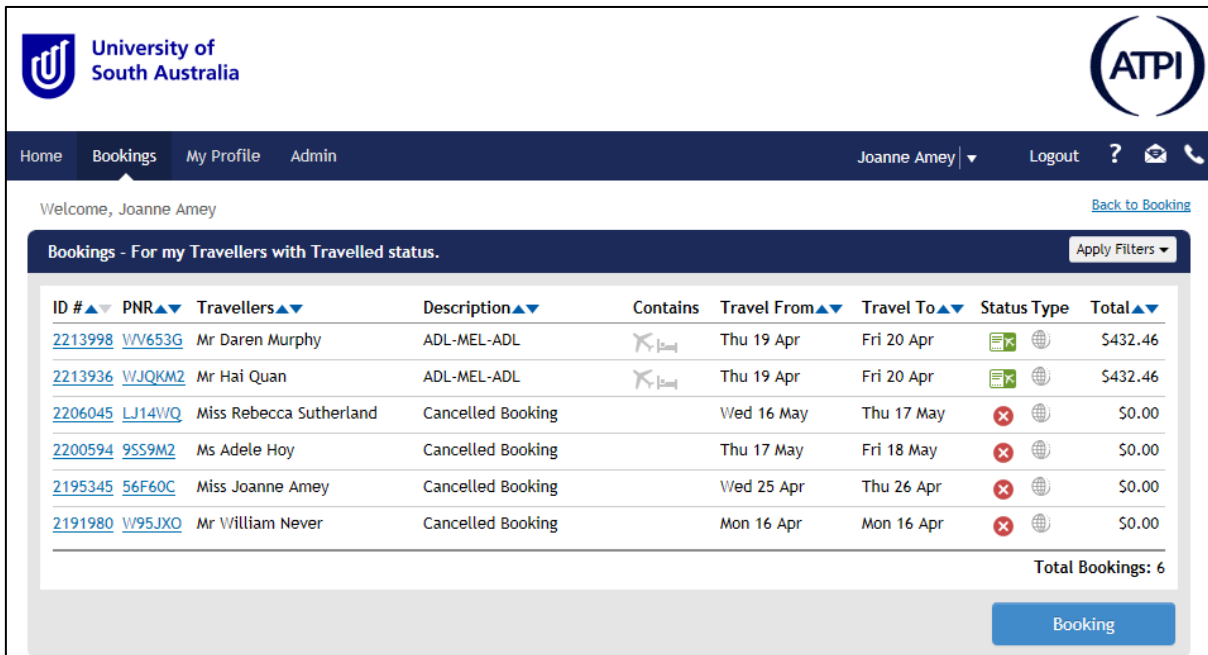
5.2. Searching Bookings

As the number of bookings grow, the filter can be useful to access your bookings.
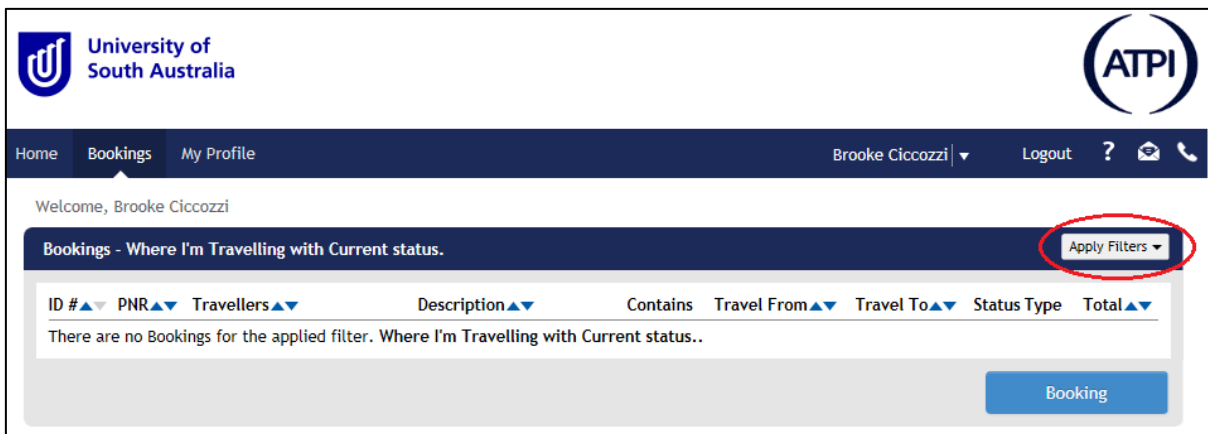
5.3. Advice for Travel Coordinators

If you book travel for other travellers, your bookings history will also show these. The filter function may be useful to reduce this list when searching for a booking (e.g. by traveller).

6. MY PROFILE PAGE

6.1. Overview

The profile page displays a limited number of your personal details that have been pulled through from the traveller profile database in Appian.

Two sections of note are:
   a. Travel Coordinators; and
   b. Preferences.
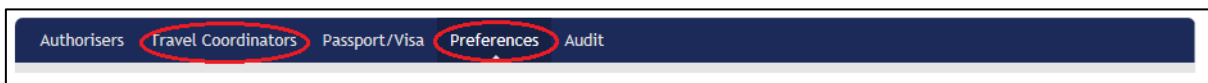
6.2. Travel Coordinators

If you have nominated one or more Travel Coordinators to make bookings on your behalf (in accordance with section 2.3 above), they will be listed under the 'Travel Coordinators' tab. If you add or remove a Travel Coordinator (in Appian) the changes will be updated here within two business days.

If you intend to self-book, this section will be blank (as shown in the screenshot below).
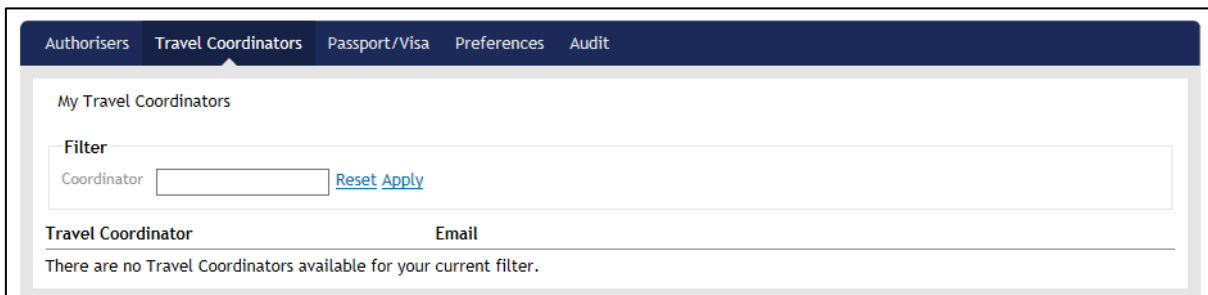
6.3. Preferences

If you have recorded your personal loyalty membership programs in your traveller profile in Appian (for airlines, hotels and car hire suppliers), they will be listed under the 'Preferences' tab. Any changes made to these in Appian will normally be reflected in Serko within a couple of minutes.
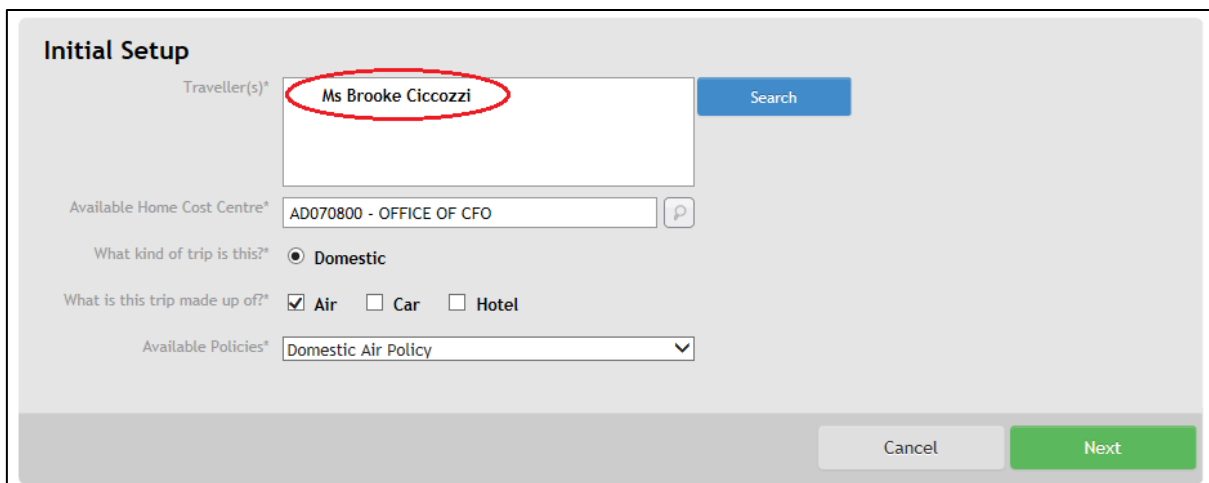
7. MAKE A BOOKING – INITIAL SET UP

7.1. Create a Booking
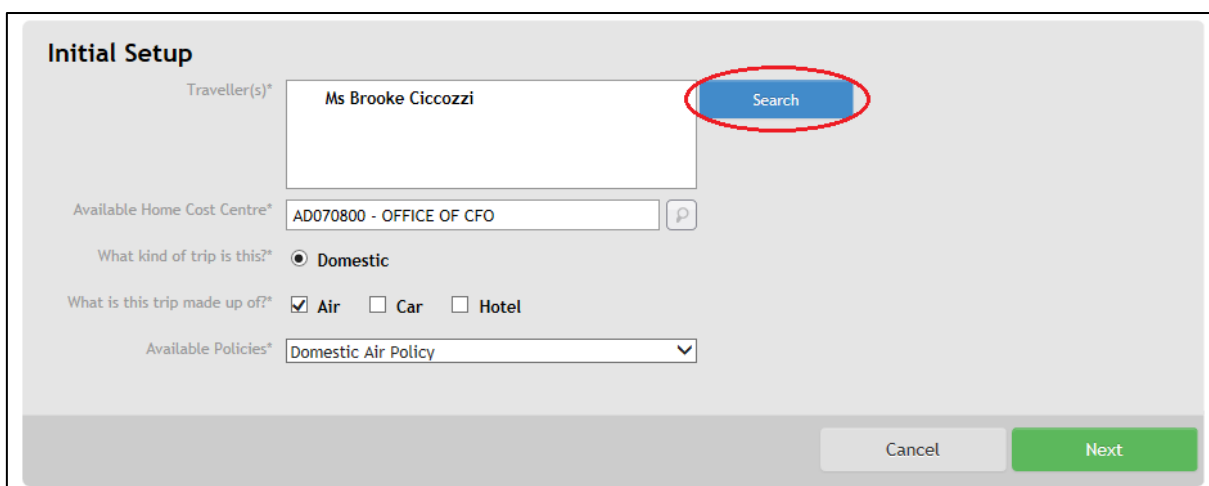
On the 'Home' or 'Bookings' tabs, click on the 'Booking' button to commence a new booking.
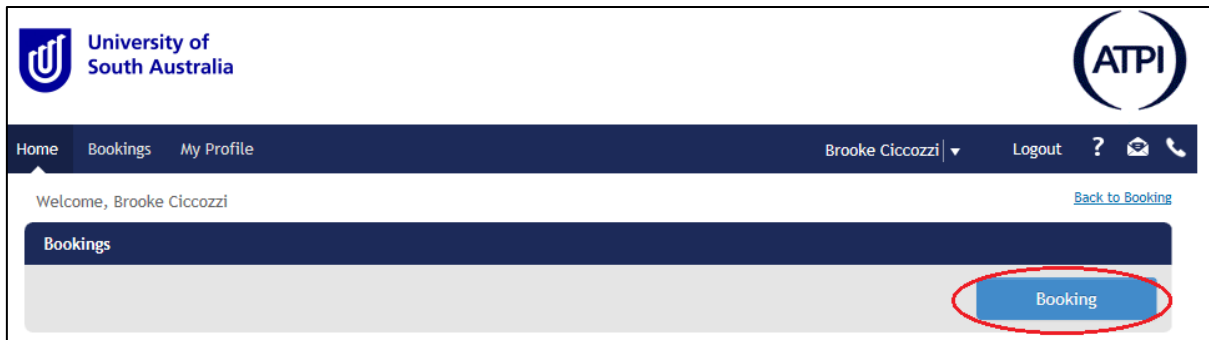
Your name should automatically appear in the Traveller(s) box.

Travel Coordinators – to select one of your traveller group, click on the blue 'Search' button.

Use the radio buttons to select the traveller you want to make a booking for. Initially, you will need to use the 'All My Travellers' search to select the relevant traveller. Enter the travellers surname in the 'Search Criteria' field and click 'Search'.

If you cannot see the name of the traveller you need to book for, it is likely they have not appointed you as their Travel Coordinator within their traveller profile Appian. As you complete more bookings, you will be able to use the other two radio buttons to find your most used and most recent travellers.

7.2. Default Cost Centre

The cost centre will default to the 'home' cost centre as nominated in the traveller's profile in Appian.

7.3. Selecting an Alternative Cost Centre

If you need to change the home cost centre for this booking:
- Click on the magnifying glass
- Type any part of the required cost centre number or description in the 'Name' section and click 'Search'
- Once found, click the radio button beside the relevant cost centre and click 'Ok'.

Please note: It is not possible to specify a PD fund as the default cost centre. If you wish to book travel against more than one cost centres or to nominate a PD fund, you can nominate additional or alternative cost centres at the end of the booking process, as described in section 11.7 on page 34.

The new cost centre will now be reflected on the Initial Setup screen.

7.4. Trip Type

The University is using Serko as a domestic-only booking tool. For all Trans-Tasman and International bookings, complete and submit the **Business Travel Request form** to the Travel Team.
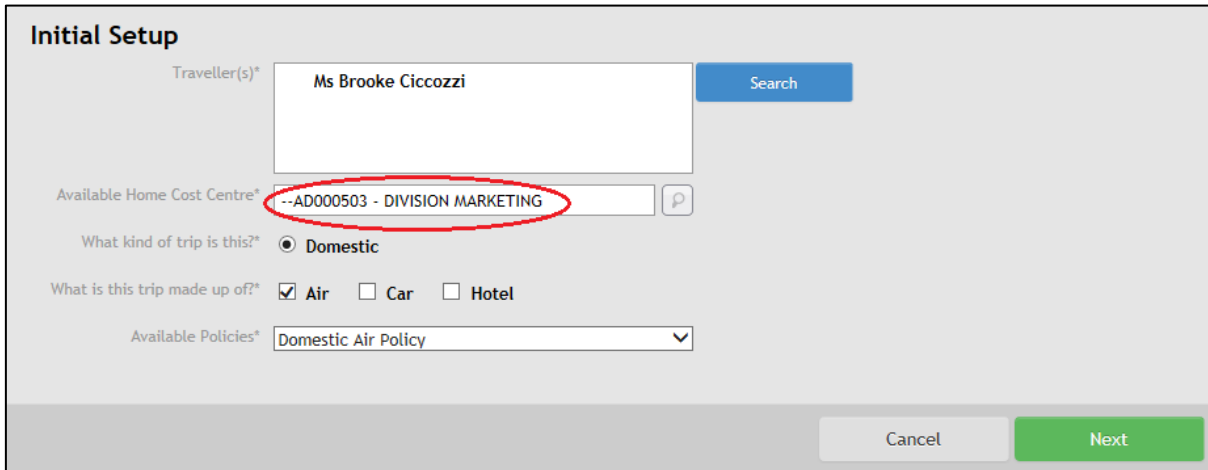
7.5. Selecting Travel Components

Select each of the travel components (air, car and hotel) that you require.

For example, if you are travelling on a same-day trip just select 'Air', but if you are staying for longer and require accommodation then also select 'Hotel'.
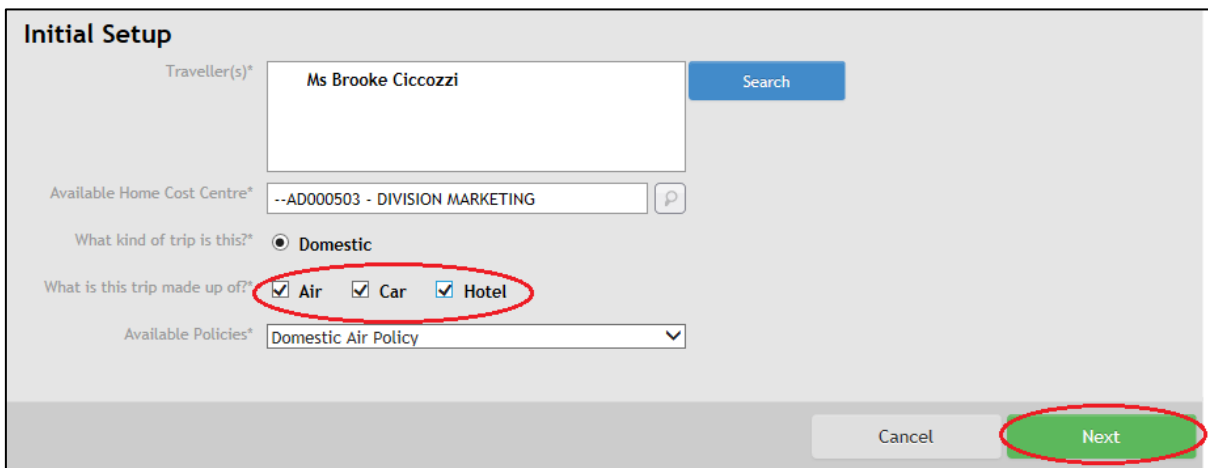
Select 'Car' if you need to hire a car.

Once you have made your selections, click 'Next'.

8. MAKE A BOOKING – AIR SELECTION

8.1. Entering Travel Requirements

Your flight selection can be entered on this screen. Your departure airport will default to the home airport (as selected in Appian), but this can be overwritten by clicking in that cell.

Enter your destination and proposed travel date. Departure times for outbound and inbound flights have been preselected to 7:00am and 5:00pm respectively, but can be changed by selecting your preferred times in the 'pickers'.

Flight results will return showing up to two hours either side of your specified time for capital cities and four hours either side for regional cities. For example, a flight selection to Melbourne due to depart at 8:00am will return flights departing from 6:00am to 10:00am.

If you are travelling to an unfamiliar destination (and you don't know the time of the day airlines depart from your chosen airport), you can select 'Any' in the 'Time' field. This will show you all available departure times for that date.

8.2. Selecting Multi-Sector Trips

Serko defaults to return journeys i.e. the second row (return journey) will be ticked. If you need to add additional segments e.g. Adelaide>Brisbane>Melbourne>Adelaide, tick the check boxes on the left-hand side of each row to add more segments. Similarly, if you are booking a one-way flight, untick the check box on line 2 to search for an outbound flight only.

Note: Economy class is standard practice for domestic travel.

8.3. Flight Options

Click on 'Search Air Availability' to search all available flights across the following domestic carriers – Qantas Airways, Virgin Australia, Jetstar and Rex Airlines.

Flights will be displayed in order of departure. You can change the order (e.g. by price or airline) by selecting the desired option from the 'Sort By' menu.

8.4. Fare Types

The types of fares are displayed on the right-hand side of the screen. Travellers should always endeavour to book the 'Low Cost' or 'Restricted Economy' fare which are the most economical for the University. If the cheapest fare is not available, select the next cheapest fare and so on.

The University's Travel Guidelines state that all flights booked for University-funded travel should be the 'lowest logical fare' available meaning the cheapest route with the least number of stops. Please refer to the University's **Travel Guidelines** for more information.

Serko provides a series of icons to assist you with your flight selection. The icons are as follows:

Fare rules and restrictions associated with this flight.

Cheapest flight available based on your search criteria.

This flight is an instant purchase fare (applies only to Jetstar and Rex flights). As soon as you finalise your booking, these fares are ticketed immediately. An additional step is required prior to completing the booking if you have chosen an instant purchase fare (a check box) to confirm you agree to the conditions of instant purchase.

There is only a limited number of seats left at the displayed price. A pop-up will prompt you to confirm you wish to proceed with this selection.

8.5. Baggage

All of the flights offered by Qantas, Virgin and Rex include one piece of checked baggage (placed in the hold) as part of the fare. However, Jetstar does not allow for any checked baggage as part of the base fare. You can confirm if baggage is included in the fare by clicking on the grey triangle beside the fare you wish to purchase.

 Baggage icon for Qantas, Virgin and Rex.

 Baggage icon for Jetstar.

Private fare – the University's preferred flight options are referred to as sale fares or restricted fares. These are the fares that are the same as those offered on the airlines' websites. However, the University has negotiated discounts with most airlines which are shown as private fares.

If the seat is sold prior to the completion of the booking, you will be charged the next fare type (Serko will advise you if this will happen).

8.6. Selecting Your Fare

Clicking on the fare you want will collapse the other results leaving your selected fare on display. If you change your mind, the search results can be shown again by clicking 'show all'.

If your search criteria displays too many options, use the Apply Filters option to narrow your selection (e.g. to remove instant purchase airlines – Jetstar and Rex – or to restrict the price range).

8.7. Selecting Non-Logical/Direct flights or Stopovers

When entering your flight details, a tick box has been pre-selected so that results will be returned containing logical (or direct) flights with no additional stop overs. If you are travelling to a destination where there are a limited number of flights (from your home airport) you may wish to un-tick this box to widen your search parameters.

A good example of this is flights between Adelaide and Canberra. There are a limited number of direct flights per day between the two cities as per the screenshot below. However, if you untick the check box, many more flights will be available but will include a stopover at another airport.

Many destinations cannot be reached via a single flight and require a stopover (two sectors or more). For example, travellers based in Adelaide cannot fly to Broome without flying to Melbourne or Perth first. Flights that include a stopover are clearly displayed in Serko, showing the number of stops and the total travel time.

To see the total route, place the cursor over the '1 stop' hyperlink.

8.8. Jetstar/Qantas flights Appearing with a Qantas Logo and Flight Number

The University has access to codeshare flights between Qantas (QF) and Jetstar (JQ). However, a consequence is that Serko presents the icon of the carrier where the content is being derived but this may not reflect all segments of the journey. For non-direct journeys, you need to place the cursor over the '*n* stop' hyperlink to clearly understand which combination of airlines make up the total trip. In the following example, even though the Qantas icon is displayed, only the first segment is with Qantas and the second segment is with Jetstar:

8.9. Airline Ticket Credits

Self-bookers (and Travel Coordinators) will now be responsible for the management and utilisation of airline ticket credits. Credits can be utilised during the booking process.

To determine whether you have any ticket credits, click on the link to 'Show Unused Tickets':

A pop-up screen will appear and list any credits available to use:

The use of all ticket credits is subject to the individual airline's terms and conditions. For example, the value of the fare must be more than the ticket credit value. For any queries regarding the use of airline credits, please contact the Travel Team (see section 2.4 above).

Note: Web-based airlines' credits such as Jetstar and Regional Express cannot be utilised via Serko. You must contact the University's domestic Travel Management Company, ATPI Voyager, directly by calling 1800 335 395 or via email au.unisa@atpi.com to utilise these credits on your behalf.

To utilise a credit, simply perform a booking, select your flights as normal and proceed through the booking process. A screen will automatically appear if a credit is available and is able to be used based on the airline's rulings. If required, click on the radio button next to the desired credit and click OK. Then continue and finalise your booking as normal. The final booking screen will display the final tickets and will be broken down by price minus the utilised credit. The final cost of the tickets will be clearly displayed at this point and required to be accepted.

Note: the itinerary will display the final cost of the ticket with no reference to the utilised credit.

8.10. Unused Credits

If you or someone in your traveller group cannot utilise an airline credit before it expires (e.g. the person has left the University or will not travel again, etc.), please contact the Travel Team (see section 2.4 above). The Travel Team has more flexibility to use ticket credits and can organise a name change so that the value of the credit (less the administration fee) can be used by another staff member.

8.11. Booking Checked Baggage with Jetstar

Jetstar does not include checked baggage automatically with their fares. The base fare includes 7kg of carry-on baggage only. If you require checked baggage, it needs to be selected during the booking process.

If you choose a Jetstar sector as part of your trip, a pop-up screen will prompt you to nominate the amount of baggage you require. It is at this stage that you also nominate your fare type. Please note, the fare type is displayed directly under the price.

Serko will only offer the cheapest fare type and travellers will need to manually select the fare type they want. A summary of the Jetstar fare types is below:

8.12. Fare Rules

Once flights have been selected, Serko will display the fare rules associated with each airline. If you are flying Adelaide/Melbourne/Adelaide all on Qantas flights, only the Qantas fare rules will be displayed. If you are flying with multiple airlines, click on the down arrow to read the fare rules of each airline.

Fare rules must be accepted to proceed with the booking.

8.13. Broken Policy

If you have not selected the lowest logical fare, you will be prompted to select a reason from a drop-down list (this is a mandatory field). Select the reason that best reflects your out-of-policy flight selection.

8.14. Lost Savings

Once you have selected your reason code (as a result of not choosing the lowest logical fare), Serko will display any lost savings. For example, if a flight departing 15 minutes earlier was $100 cheaper this will be recorded against the booking as a lost saving.

Lost savings are summarised on the draft itinerary screen (prior to completing the booking).

All lost savings will be communicated to organisational units through the University's scheduled travel reports.

8.15. Advanced Booking Behaviour

It is recommended to book travel as soon as your trip is confirmed (and approved by your VCA approver).

Domestic travel should be booked a minimum of seven days in advance (when possible) to maximise availability and therefore reduce airfare costs.

For each booking, Serko provides reports on the number of days an airfare is purchased prior to departure, which will be communicated to organisational units through the University's scheduled travel reports.

9. MAKE A BOOKING – CAR SELECTION

9.1. Overview

If you ticked the check box for car hire on the Initial Setup screen, the pick-up and drop-off details will be pre-populated based on your flight selection. Click in the boxes to change the pick-up and drop-off details, if required.

By clicking 'Search Car Availability', Serko will check the content available from Avis, Hertz, Budget, Thrifty and Europcar.

Note: the University has access to preferred government rates with Avis, Hertz and Budget. As a result, rates with Europcar and Thrifty may be more expensive.

9.2. Default Location and Selecting Alternative Pick-Up/Drop-Off

Car hire pick-up and drop-off locations default to the arrival airport. If you want to pick up/drop off the car at another location, this needs to be changed manually.

1. Click on 'Advanced Options'
2. To change your 'Pick-up' or 'Drop-off' depot (from the airport default location), nominate the car hire company you wish to use
3. Amend the pick-up/drop-off fields as required

Each car hire company has different depot locations so the company needs to be selected manually.

Serko provides a series of icons to assist you with your car selection. The icons are as follows:

i   Rental rules and restrictions associated with this car.

$ Cheapest car available based on your search criteria.

9.3. Extras and Special Requests

Once you have made your selection, you will be prompted to specify if you also want to hire a satellite navigation system. If yes, tick the check box. If no, click 'Ok' to proceed.

You will also be reminded that you will be required to provide a form of payment at the point of vehicle collection. If you have any special requests, enter them in the 'Comment' box.

10. MAKE A BOOKING – HOTEL SELECTION

10.1. Hotel Selection

If you ticked the check box for hotel accommodation on the Initial Setup screen, the check-in and check-out details will be pre-populated based on your flight selection. Click in the boxes to change the check-in and check-out dates and times, if required.

10.2. Initial Search

Serko offers multiple options when searching for accommodation. The radio buttons allow you to search by:

Location   Hotels within the radius of the distance specified from the CBD or airport

Address   Hotels within the radius of the distance specified from the specified street address

Name   A specific hotel from the drop-down list e.g. Intercontinental Adelaide

All   All properties that have availability for the requested travel dates

Hotels will be listed in price order from cheapest to most expensive. You can filter the results (e.g. by hotel chain or rating) by clicking on 'Apply Filters' or change the order (e.g. by distance or rating) by selecting the desired option from the 'Sort By' menu.

Serko will notify you if there is no availability at certain hotels.

Note: Hotel content displayed from the Global Distribution System will specify their proximity to the local airport and not a city centre when booking in conjunction with a flight. Therefore, when searching for accommodation based on 'All' within a city, accommodation will be displayed based on that city's local airport e.g. if you search for hotels at Mount Gambier, the Eco Lodge Portland (nearly 100km from Mount Gambier) will appear.

10.3.   Map Functionality

Click on 'Show Map' to display and adjust the search results using a map. You can enter an address, move and zoom the map, alter the radius of properties that you want to see, etc. The key above the map also offers a visual representation of the University's preferred and non-preferred hotels.

10.4.   More Info & Room Rates

Further information about each hotel can be found by clicking on the 'More Info & Room Rates' bar below the photograph.

There are three tabs:

Room Rates   You can choose between the available room types. If inclusions apply to a room you have selected, they will also be listed in this section:

Hotel Facilities   A list of hotel facilities is provided (e.g. parking, pool, gym, business lounge, etc.)
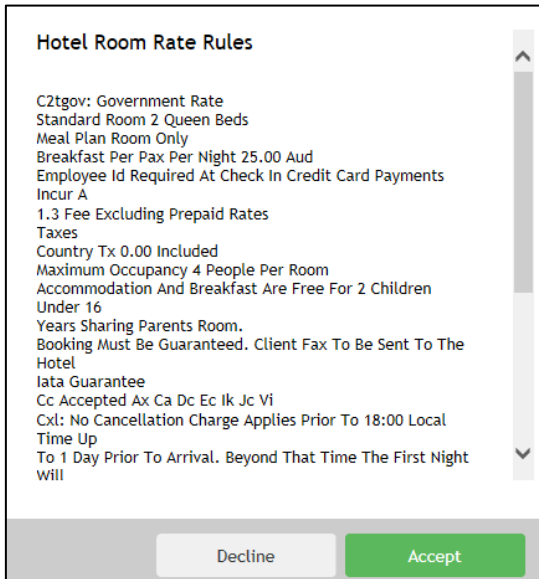
Hotel Details   A list of details specific to the property are listed including address, cancellation policy, directions from the local airport, etc.

Serko provides a series of icons to assist you with your hotel selection:

	Distance from the specified search location to the hotel.
	University's preferred hotel listing. Preferential rates have been negotiated with these hotels and some properties also include breakfast, Wi-Fi etc.
	Negotiated by the Travel Management Company for the University to use. These rates are often advantageous if you are travelling to a location where the University does not have a preferred rate.
	The University does not have access to a preferred rate. The property should only be booked if no other suitable content is available.

10.5. Hotel Room Rates

Click 'Select' to choose the required hotel and room then click 'Next' at the bottom of the screen. A pop-up window will display the terms and conditions for the room you have chosen. Click 'Accept' to proceed.
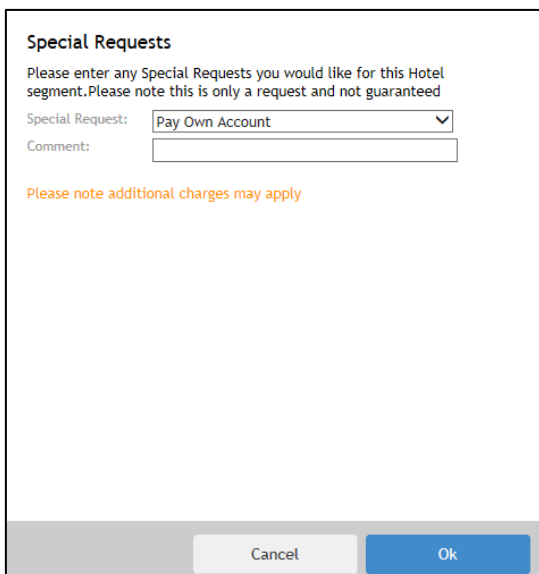
Hotel Room Rate Rules

C2tgov: Government Rate
Standard Room 2 Queen Beds
Meal Plan Room Only
Breakfast Per Pax Per Night 25.00 Aud
Employee Id Required At Check In Credit Card Payments Incur A
1.3 Fee Excluding Prepaid Rates
Taxes
Country Tx 0.00 Included
Maximum Occupancy 4 People Per Room
Accommodation And Breakfast Are Free For 2 Children Under 16
Years Sharing Parents Room.
Booking Must Be Guaranteed. Client Fax To Be Sent To The Hotel
Iata Guarantee
Cc Accepted Ax Ca Dc Ec Ik Jc Vi
Cxl: No Cancellation Charge Applies Prior To 18:00 Local Time Up
To 1 Day Prior To Arrival. Beyond That Time The First Night Will

[Decline] [Accept]

10.6. Special Requests

A 'Special Requests' pop up window will appear advising that the traveller must pay their own account at the time of check-out.

The Comment field can be used to communicate information or requests to the hotel. Anything entered here will be sent electronically to the hotel and may be subject to availability or additional charges. Examples of requests that can be made to the hotel are:

- Disability room required
- Same floor as my UniSA colleague Fred Smith
- Late check in required

Special Requests

Please enter any Special Requests you would like for this Hotel segment. Please note this is only a request and not guaranteed

Special Request: Pay Own Account
Comment:

Please note additional charges may apply

[Cancel] [Ok]

Note: Any lost savings will be displayed on the draft itinerary page prior to completing your booking and will be captured within Serko as reportable data.

Thu 17 May 2018

Mercure Grosvenor H
125 NORTH TERRACE
ADELAIDE SA 5000 AU
Phone: 61 8-84078888
Fax: 61 8-84078866
Provider: Online

City: **Adelaide**
Check-in: 02:00 p.m.
Check-out: Fri 18 May 2018
10:00 a.m.

Rate Type: C2TGOV
Description: Government Rate,
Employee Id Required At Check
In, Standard Room 2 Queen Beds

Price: $169.15
(1 Room(s) × 1 × $169.15 / night)
Best Rate: $95.40 at Adelaide
Granada
Lost Savings: $73.75

11. COMPLETING YOUR BOOKING

Once the travel content has been selected, some final administrative steps and checks must be completed prior to finalising the booking.

11.1.   Draft Itinerary

Serko displays your draft itinerary, including all flight, accommodation and car hire requirements. If you notice an error or want to make a change (prior to completing your booking), click on 'More Actions' on the right-hand side for several options.

For example, if you click 'Hotel' you will be returned to the Hotel module and Serko will allow you to re-search for accommodation.

If you need to add a hotel or car PRIOR to travel (for example, one night's accommodation at an airport hotel the night before an early morning flight), click on 'More Actions' but in the blue header bar. This will allow you to add content prior to the flights you have selected. The same process works if you are hiring a car and driving to an airport (prior to a flight).

The 'Itinerary' screen will also highlight whether the content choices that have been made (flights, accommodation, etc.) are in accordance with the Travel Guidelines – for example, if the lowest logical fare has been selected.

Serko provides visual confirmation that baggage is or is not included for each flight. If this is not correct, click on 'More Actions' to return to the flight module to make any changes to baggage.
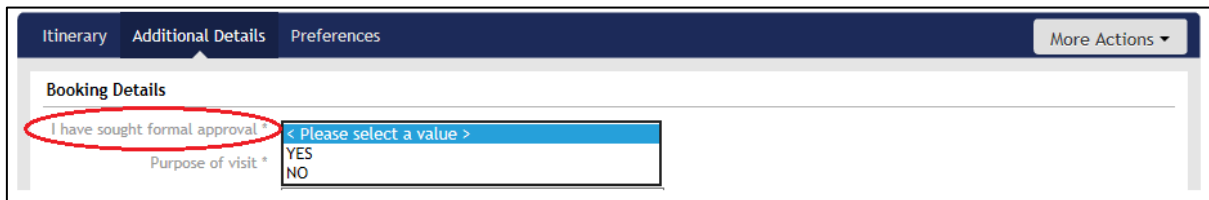

11.2. Additional Information

Prior to the completion of each booking, the information on the 'Additional Details' tab must be completed. **Continued use of Serko is contingent on this information being accurate and complete.** Each section will be described in detail. Mandatory fields are highlighted with an asterisk (*).

11.3.   Travel Approval

Serko does <u>not</u> include an approval workflow. As Serko is a live booking tool, travellers are required to obtain documented approval for the intended trip from the relevant VCA holder PRIOR to completing a booking in Serko. **Travellers cannot approve their own travel.**
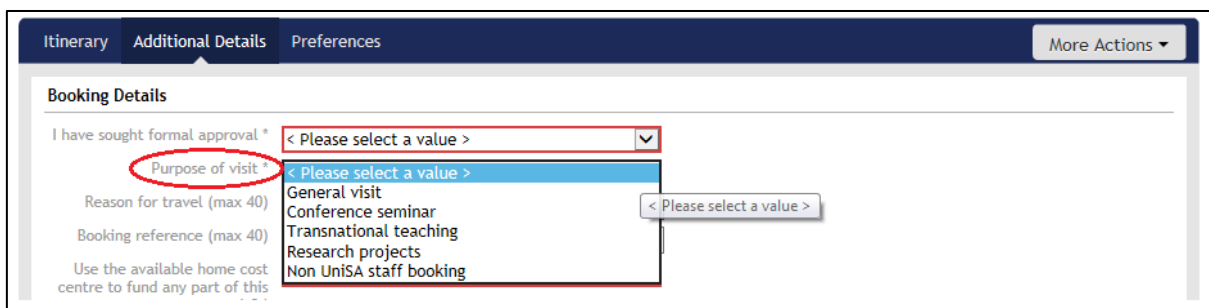

The University reserves the right to recoup the cost of unapproved travel from the traveller, and to rescind access to Serko if this requirement is not adhered to.

11.4.   Purpose of Visit

Select from the drop-down menu the description which best describes the purpose of your trip.

11.5.   Reason for Travel

If relevant, enter the reason for travel. This may include the name of the customer/supplier you are visiting, the name of the conference, etc.
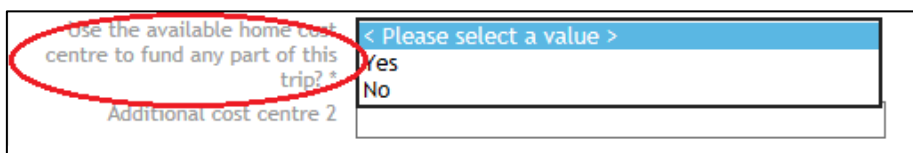
11.6.   Booking Reference

If your booking is made by the Travel Team on your behalf, your BTR number will be included here. If your area has a sequential numbering system for bookings, include your reference here.

11.7.   Use the Available Home Cost Centre to Fund any Part of this Trip

If <u>any</u> of your travel costs are to be charged to your default 'home' cost centre – as listed on the 'Initial Setup' screen – select 'Yes' from the drop-down menu.

If none of your travel costs are to be charged to your home cost centre, select 'No'.

If you want to split the trip costs across multiple cost centres (to a maximum of three) or nominate an alternative cost centre to the home cost centre, enter the additional cost centre(s) (including sub-ledger and digits) in the 'Additional cost centre 2' and 'Additional cost centre 3' fields together with the amounts ('dollar value') you want to apportion to each cost centre. To assist, a breakdown of the trip costs can be found in the upper right-hand corner by clicking on 'Show Details'.

Example 1: Charge all travel costs to the home cost centre:

Example 2: Apportion travel costs across two cost centres (including the home cost centre):

Example 3: Apportion travel costs across two cost centres (excluding the home cost centre):

Booking Details

I have sought formal approval *	YES ▾
Purpose of visit *	General visit ▾
Reason for travel (max 40)	Test
Booking reference (max 40)	Test
Use the available home cost centre to fund any part of this trip? *	No ▾
Additional cost centre 2	AD071045
Additional cost centre 2 dollar value	215.28
Additional cost centre 3	AD070650
Additional cost centre 3 dollar value	215.27

Example 4: Charge all travel costs to a PD fund:

Booking Details

I have sought formal approval *	YES ▾
Purpose of visit *	General visit ▾
Reason for travel (max 40)	Test
Booking reference (max 40)	Test
Use the available home cost centre to fund any part of this trip? *	No ▾
Additional cost centre 2	PD1255130946
Additional cost centre 2 dollar value	430.55
Additional cost centre 3	
Additional cost centre 3 dollar value	

Travel costs can only be split between a maximum of two PD funds as it is not possible to specify a third PD fund as the home cost centre.

Please contact your School/Unit finance representative if you need to take funding from more than three cost centres.

11.8. Notes (for the Travel Management Company)

The final field on the Additional Details tab allows you to send a message to the University's Travel Management Company, ATPI Voyager. By typing something into this field, your booking will be workflowed to an ATPI Travel Consultant for review prior to completion. Situations when you may want to use this field include (but are not limited to):

- If a disability room is required
- You need to stay in a particular hotel which was not showing as available in Serko

Note: If this field is populated in any way, the University will incur a higher 'consultant-assisted' transaction fee. If you do not have any special requests, please leave this field blank.

Notes	
Travel Agency	
Please note additional fees may be charged for notes to Travel Agency.	

11.9. Finalising Your Booking

Once all the mandatory fields have been completed, Serko will allow you to finalise your booking.

The final tab on this page is the 'Preferences' tab where you will be able to view any travel memberships you may have. If all of your sectors are Qantas (but you are also a Virgin Australia Velocity member), only your Qantas Frequent Flyer membership will be selected. The same will also apply to any car hire and hotel program memberships.

Itinerary	Additional Details	Preferences			More Actions ▾
Preferences					
Use Traveller	**Type**	**Service**	**Comment/Name**		
☑ Ms Joanne Amey	Hotel Membership	All Brands For Hilton	0123456789		
					Total: 1
					Add Preference

Preferences can be added manually at the time of booking by clicking on the 'Add Preference' button. However, it is recommended that you update your traveller profile in Appian so the preference will be automatically pulled through for all future bookings.

Please review the full itinerary prior to finalising the booking. To complete the booking, click the green 'Finish' button.

All bookings made via Serko will undergo robotic ticketing once the booking is completed. An itinerary will be sent to the travel booker (traveller or travel coordinator), usually within 30 minutes (excluding consultant-assisted bookings).

12. NEXT STEPS

12.1. Line Manager's Notification and Final Itinerary

Once you have finalised your booking, summary notification will be e-mailed to the traveller's line-manager (as specified in their traveller profile in Appian) outlining the itinerary and any lost savings.
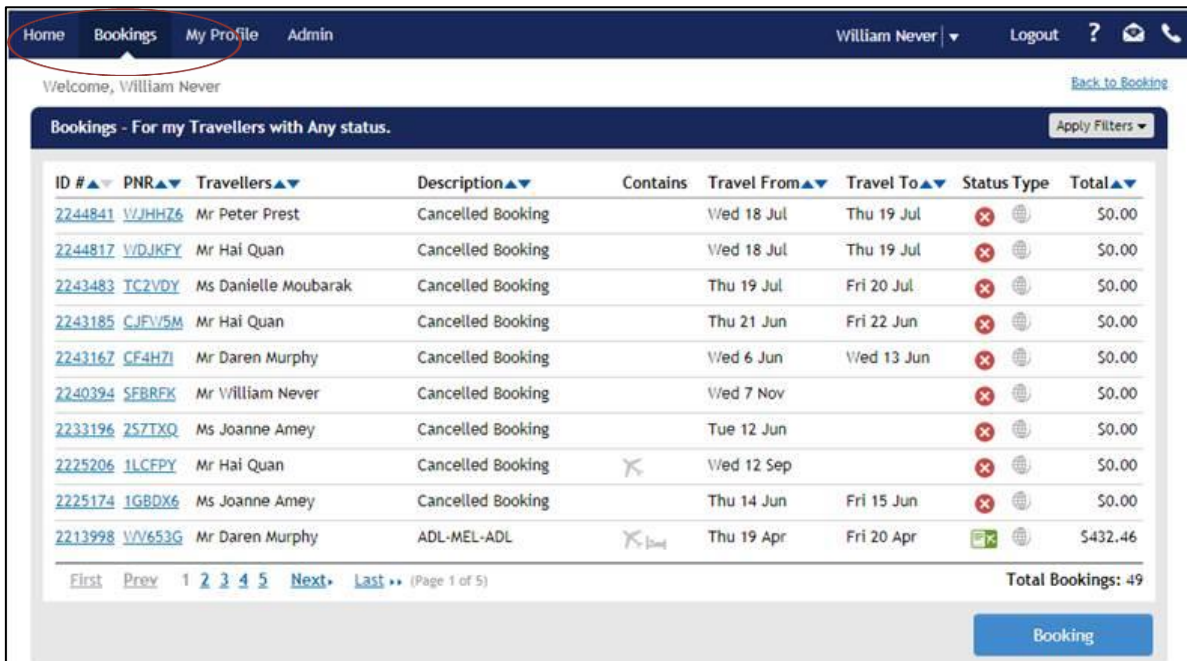
The travel booker (Traveller or Travel Coordinator) will receive the final itinerary once ticketed. If a mistake is noticed, the Travel Management Company may be able to void a ticket that was not instantly purchased i.e. Qantas or Virgin flights. Please immediately contact the Travel Management Company, ATPI Voyager, directly by calling 1800 335 395, if a mistake is identified.

12.2. Amendments

It is possible to amend a finalised booking, subject to the conditions of the fare type purchased.

Note: this may result in a transaction fee to the traveller's nominated cost centre(s).

To amend a booking, click on the 'Bookings' tab and open the booking by clicking on either of the hyperlinks (in columns ID# or PNR):

A message below the reference number will state if amendments are not permitted:

For example, to amend a flight, click on 'More Actions' beside the required flight and then 'This flight' and follow the instructions :

You can also select seating, amend your hotel or amend your car hire options in the same transaction by following the above instructions.

Note: The transaction fee for each booking will normally be charged to a corporate travel cost centre and not passed on to the traveller. However any subsequent fees relating to amendments, cancellations or the use of credits will be borne by the traveller's nominated cost centre(s).

12.3. Cloning/Copying a Previous Booking

It is possible to clone/copy an existing booking to create a new booking.

Click on the 'Bookings' tab and open the previous booking by clicking on either of the hyperlinks (in columns ID# or PNR). Click on 'More Actions' and select 'Clone':

Serko will then pre-populate the same booking information within a new travel booking process, which can be amended as required before finalising the new booking.

12.4. Sharing an Itinerary

If you wish to share your itinerary with another traveller, click on 'Share Booking'. The following screen will appear:

Your itinerary can be shared within anyone that has a traveller profile in Appian. Fill in the requested details and click the search button to identify another traveller. Click on the radio button of the required person and click 'Send Email' to share with the selected person.