



South African Weather Service

Travel Request (SCM Only)

Training Manual

Document Review and Distribution

Revision history

Version	Author	Date	Revision	Email address
1.0	Kgothatso Miya	03/10/2019	Draft	Kgothatso.Lehobye@eoh.com
1.0				
1.1				
1.2				
1.3				

Document distribution

This training manual will be distributed to the course attendance

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1 INTRODUCTION

Welcome to the world of NetSuite.

In this course, you will learn how process Travel Request within the SAWS environment. You will become familiar with the layouts and menu paths of NetSuite. The NetSuite application run within a browser window i.e. Internet Explorer e.c.t. When you log into NetSuite, you will see a set of tabbed pages. NetSuite calls these tabbed pages a “center”. The role that will be assigned to you will determine which “center” you will be able to see.

Upon completion of this module, you will be able to:

- Log-in and navigate NetSuite successfully
- How to change cost on Travel Request
- How to update information on Travel Request
- How to print a Travel Request
- How to print a Travel Request Report

2 TRAVEL REQUEST

The Travel Request record is used for requesting travel.

Once you have entered a travel request, you can view a list of existing travel requested that have been loaded, to check the status or further process them.

A Travel Request can have one of the following statuses:

Travel Request Status	Status Detail
Pending Approval	The Travel Request is Pending Approval
Approved	The Travel Request is Approved
Rejected	The Travel Request is Rejected
Cancelled	The Travel Request is Cancelled
Complete	Once a Travel Request is complete no changes can be made to the travel request

2.1 Enter Travel Request

2.1.1 Step 1 – Navigation

- To login, please enter your email and password

ORACLE® NETSUITE

Email address

Password

Remember Me

Log In

By clicking on the Log In button, you understand and agree to Oracle Terms of Use and Oracle Privacy Policy

Forgot your password?
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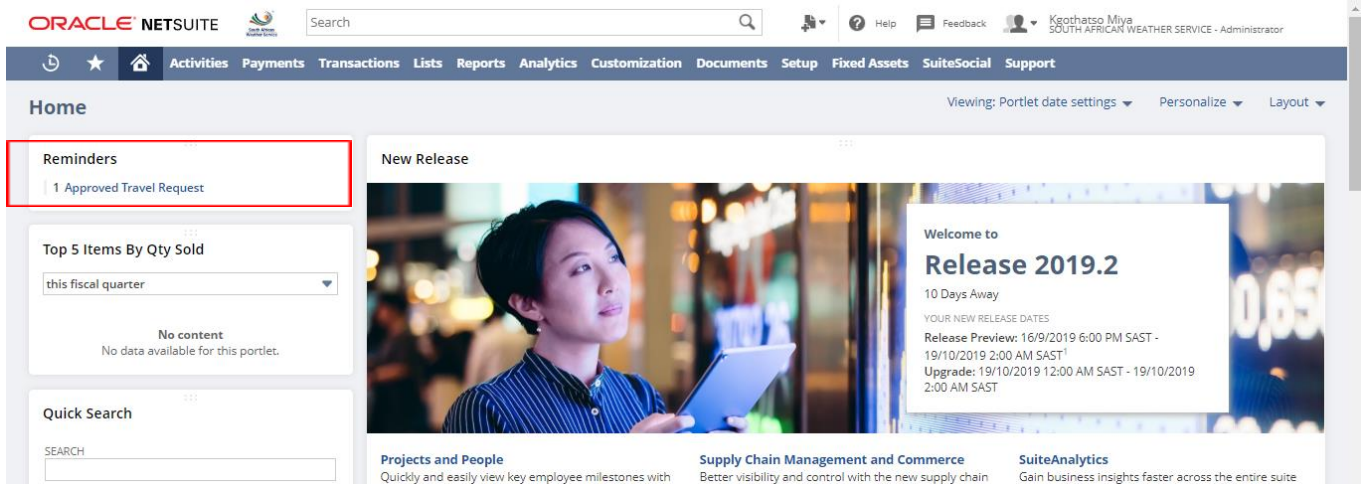
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Access the webinars and re-plays via your LCS Pass login.



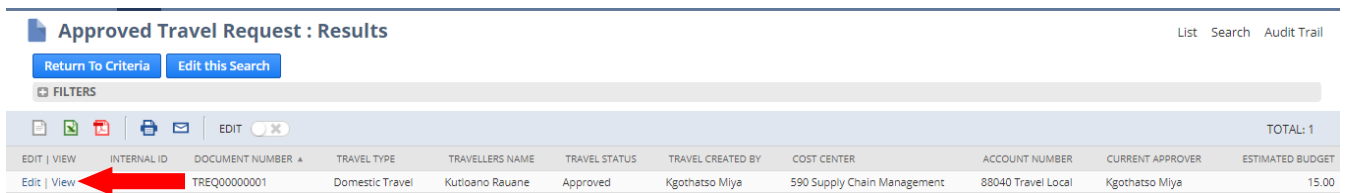
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- Log in as **SAWS SCM Buyer Role** – To change travel request cost and update information on the travel request.
- On the reminder, Click on Approved Travel Request



The screenshot shows the Oracle NetSuite Home dashboard. The 'Reminders' section is highlighted with a red box and contains '1 Approved Travel Request'. Other sections include 'Top 5 Items By Qty Sold', 'Quick Search', and a 'New Release' banner for 'Release 2019.2'.

- Click on view, next to the travel request you want to print.



The screenshot shows the 'Approved Travel Request : Results' page. It includes a table with columns for 'INTERNAL ID', 'DOCUMENT NUMBER', 'TRAVEL TYPE', 'TRAVELLERS NAME', 'TRAVEL STATUS', 'TRAVEL CREATED BY', 'COST CENTER', 'ACCOUNT NUMBER', 'CURRENT APPROVER', and 'ESTIMATED BUDGET'. A red arrow points to the 'View' link in the first row.

EDIT VIEW	INTERNAL ID	DOCUMENT NUMBER	TRAVEL TYPE	TRAVELLERS NAME	TRAVEL STATUS	TRAVEL CREATED BY	COST CENTER	ACCOUNT NUMBER	CURRENT APPROVER	ESTIMATED BUDGET
Edit View	TREQ00000001		Domestic Travel	Kutoano Rauane	Approved	Kgothatso Miya	590 Supply Chain Management	88040 Travel Local	Kgothatso Miya	15.00

3 HOW TO PRINT A TRAVEL REQUEST PDF FORM

- Click on the print button

Travel Request ← → List Search

TREQ00000001

[Edit](#) [Back](#) [Print](#) [Actions](#)


Primary Information		
TREQ TREQ00000001	PURPOSE OF TRIP Manco Meeting	TRAVELERS ID NUMBER 123456855
DATE CREATED 2/10/2019 3:48 pm	DESTINATION Centurion	TRAVEL CONTACT DETAILS 0852547452
TRAVEL TYPE Domestic Travel	DURATION (DAYS) 4	VOYAGER NUMBER 45854
TRAVELLERS NAME Kutloano Rauane	TRAVELLERS TITLE AND FULL NAMES Kutloano Rauane	ROYALTY NUMBER 54556
TRAVELLING DATE 26/10/2019		

Classification		
COST CENTER 590 Supply Chain Management	TRAVEL STATUS Approved	CHANGE IN COST: NOTES
ACCOUNT NUMBER 88040 Travel Local	CURRENT APPROVER Kgothatso Miya	
ESTIMATED BUDGET 15.00		

Flight Detail	
FLIGHT: DATE, TIME, FROM AND TO (DEPARTURE) 20/10/2019, 1 pm, Cape Town International Airport to OR Tambo International Airport	FLIGHT: DATE, TIME, FROM AND TO (RETURN) 20/10/2019, 1 pm, Cape Town International Airport to OR Tambo International Airport

- Print the travel request PDF form

1 / 2



**South African
Weather Service**
SOUTH AFRICAN WEATHER SERVICE
Eco Glades block 1b, Eco Park
Cnr Olievenhoutbosch and Ribbon Grass Streets
Centurion Gauteng 0157
South Africa

Travel Request

TREQ: TREQ00000001

Primary Information			
Travel Type	Domestic Travel	Travellers Title and Full Names	Kutloano Rauane
Travellers Name	Kutloano Rauane	Travelers ID Number	123456855
Travelling Date	26/10/2019	Travel Contact Details	0852547452
Purpose of Trip	Manco Meeting	Voyager Number	45854
Destination	Centurion	Royalty number	54556
Duration (days)	4		

Classification			
Cost Center	590 Supply Chain Management	Account Number	88040 Travel Local
Estimated Budget	R15.00	Travel Status	Approved
Travel Budget Approved by	Kgothatso Miya	Travel Line Manager Approved by	Kgothatso Miya


Flight Details	
Flight: Date, Time, From and To (Departure)	Flight: Date, Time, From and To (Return)

4 HOW TO CHANGE TRAVEL REQUEST COST

- Click on Edit

Travel Request ← → List Search

TREQ00000030

Edit  Complete Change in Cost Actions

Primary Information

TREQ# TREQ00000030	PURPOSE OF TRIP hi	TRAVELERS ID NUMBER hi
TRAVELER NAME 6 Kgothatso Miya	DESTINATION hi	TRAVEL CONTACT DETAILS
DATE CREATED 4/10/2019 10:45 am	DURATION (DAYS) 1	VOYAGER NUMBER
TRAVELLING DATE 6/10/2019		ROYALTY NUMBER

Classification

COST CENTER 001 Aviation Johannesburg	TRAVEL STATUS Approved	CHANGE IN COST: NOTES
ACCOUNT NUMBER 88040 Travel Local	CURRENT APPROVER 26 Training 1	
ESTIMATED BUDGET 10.00		


Flight Detail

FLIGHT: DATE, TIME, FROM AND TO (DEPARTURE) FLIGHT: DATE, TIME, FROM AND TO (RETURN)

- Make changes to the estimated budget
- Change in cost: Note – Type in the reason for the cost change
- Click on Save

Travel Request ← → List Search More

TREQ00000030

Save  Reset Complete Change in Cost Actions

Primary Information

TREQ# TREQ00000030	PURPOSE OF TRIP * hi	TRAVELERS ID NUMBER hi
TRAVELER NAME * 6 Kgothatso Miya	DESTINATION * hi	TRAVEL CONTACT DETAILS
DATE CREATED 4/10/2019 10:45 am	DURATION (DAYS) * 1	VOYAGER NUMBER
TRAVELLING DATE * 6/10/2019		ROYALTY NUMBER

Classification

COST CENTER * 001 Aviation Johannesburg	TRAVEL STATUS Approved	CHANGE IN COST: NOTES 1.User changed flights and that cost <u>R2500</u>
ACCOUNT NUMBER * 88040 Travel Local	CURRENT APPROVER 26 Training 1	
ESTIMATED BUDGET * 5000.00		

- Click on the Change in Cost Button

Travel Request ← → List Search

TREQ00000030

Primary Information

TREQ# TREQ00000030	PURPOSE OF TRIP hi	TRAVELERS ID NUMBER hi
TRAVELER NAME 6 Kgothatso Miya	DESTINATION hi	TRAVEL CONTACT DETAILS
DATE CREATED 4/10/2019 10:45 am	DURATION (DAYS) 1	VOYAGER NUMBER
TRAVELLING DATE 6/10/2019		ROYALTY NUMBER

Classification

COST CENTER 001 Aviation Johannesburg	TRAVEL STATUS Approved	CHANGE IN COST: NOTES 1.User changed flights and that cost R2500
ACCOUNT NUMBER 88040 Travel Local	CURRENT APPROVER 26 Training 1	
ESTIMATED BUDGET 5000.00		

Flight Detail

FLIGHT: DATE, TIME , FROM AND TO (DEPARTURE) FLIGHT: DATE, TIME , FROM AND TO (RETURN)

- Travel Request approval status is now showing as pending approval and no changes can be made to the Travel Request while pending approval.
- Current approver field will reflect the individual who needs to approve the travel request
- Recall Travel Request Button will appear, if the requestor notices that they made a mistake they can recall the travel request
-

Travel Request ← → List Search

TREQ00000030

Primary Information

TREQ# TREQ00000030	PURPOSE OF TRIP hi	TRAVELERS ID NUMBER hi
TRAVELER NAME 6 Kgothatso Miya	DESTINATION hi	TRAVEL CONTACT DETAILS
DATE CREATED 4/10/2019 10:45 am	DURATION (DAYS) 1	VOYAGER NUMBER
TRAVELLING DATE 6/10/2019		ROYALTY NUMBER

Classification

COST CENTER 001 Aviation Johannesburg	TRAVEL STATUS Pending Approval	CHANGE IN COST: NOTES 1.User changed flights and that cost R2500
ACCOUNT NUMBER 88040 Travel Local	CURRENT APPROVER 26 Training 1	
ESTIMATED BUDGET 5000.00		

Flight Detail




FLIGHT: DATE, TIME , FROM AND TO (DEPARTURE) FLIGHT: DATE, TIME , FROM AND TO (RETURN)

5 HOW TO COMPLETE A TRAVEL REQUEST

- Click on Complete button if there will be on changes in cost

Travel Request ← → List Search

TREQ00000030

[Edit](#)
[Back](#)
[Complete](#)



Actions ▾

Primary Information		
TREQ# TREQ00000030	PURPOSE OF TRIP hi	TRAVELERS ID NUMBER hi
TRAVELER NAME 6 Kgothatso Mliya	DESTINATION hi	TRAVEL CONTACT DETAILS
DATE CREATED 4/10/2019 10:45 am	DURATION (DAYS) 1	VOYAGER NUMBER
TRAVELLING DATE 6/10/2019		ROYALTY NUMBER



Classification		
COST CENTER 001 Aviation Johannesburg	TRAVEL STATUS Approved	CHANGE IN COST: NOTES 1.User changed flights and that cost R2500
ACCOUNT NUMBER 88040 Travel Local	CURRENT APPROVER 26 Training 1	
ESTIMATED BUDGET 5000.00		

Flight Detail	
FLIGHT: DATE, TIME , FROM AND TO (DEPARTURE)	FLIGHT: DATE, TIME , FROM AND TO (RETURN)

- The travel request , travel status has now changed to complete

Travel Request ← → List Search

TREQ00000030

[Edit](#)
[Back](#)


Actions ▾

Primary Information		
TREQ# TREQ00000030	PURPOSE OF TRIP hi	TRAVELERS ID NUMBER hi
TRAVELER NAME 6 Kgothatso Mliya	DESTINATION hi	TRAVEL CONTACT DETAILS
DATE CREATED 4/10/2019 10:45 am	DURATION (DAYS) 1	VOYAGER NUMBER
TRAVELLING DATE 6/10/2019		ROYALTY NUMBER

Classification		
COST CENTER 001 Aviation Johannesburg	TRAVEL STATUS Complete	CHANGE IN COST: NOTES 1.User changed flights and that cost R2500
ACCOUNT NUMBER 88040 Travel Local	CURRENT APPROVER 26 Training 1	
ESTIMATED BUDGET 5000.00		

Flight Detail	
FLIGHT: DATE, TIME , FROM AND TO (DEPARTURE)	FLIGHT: DATE, TIME , FROM AND TO (RETURN)

6 HOW TO UPDATE SCM INFORMATION ON A TRAVEL REQUEST

➤ Click on Edit

Travel Request ← → List Search

TREQ00000001

[Edit](#)  [Actions](#)

Primary Information

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TRAVELLING DATE 26/10/2019		

Classification

COST CENTER 590 Supply Chain Management	TRAVEL STATUS Approved	CHANGE IN COST: NOTES
ACCOUNT NUMBER 88040 Travel Local	CURRENT APPROVER Kgothatso Miya	
ESTIMATED BUDGET 15.00		

Flight Detail

FLIGHT: DATE, TIME, FROM AND TO (DEPARTURE) 20/10/2019, 1 pm, Cape Town International Airport to OR Tambo International Airport	FLIGHT: DATE, TIME, FROM AND TO (RETURN) 20/10/2019, 1 pm, Cape Town International Airport to OR Tambo International Airport
--	---

Go to the SCM subtab

1. 20/10/2019, 5pm and Check out 21/20/10/2019, 5pm. 2. 20/10/2019, 5pm and Check out 21/20/10/2019, 5pm	Formula One Centurion	BnB
PREFERRED HOTEL Protea Hotel Centurion		SMOKING OR NON- SMOKING ROOM Non-Smoking Room

Car Hire Detail

VEHICLE GROUP Group B	PICK UP/DELIVERY DATE, TIME AND LOCATION 20/10/2019, 1 pm, Cape Town International Airport to OR Tambo International Airport	DROP OFF/COLLECTION DATE, TIME AND LOCATION 20/10/2019, 1 pm, Cape Town International Airport to OR Tambo International Airport
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Shuttle Detail

SHUTTLE PICK UP AND DROP OFF: DATE, TIME AND ADDRESS 20/10/2019, 1 pm, Cape Town International Airport to OR Tambo International Airport 20/10/2019, 1 pm, Cape Town International Airport to OR Tambo International Airport	ADDITIONAL SHUTTLE 20/10/2019, 1 pm, Cape Town International Airport to OR Tambo International Airport
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Notes Files Workflow Custom **SCM** Travel Rejection Reason

User Notes System Notes

VIEW
Default

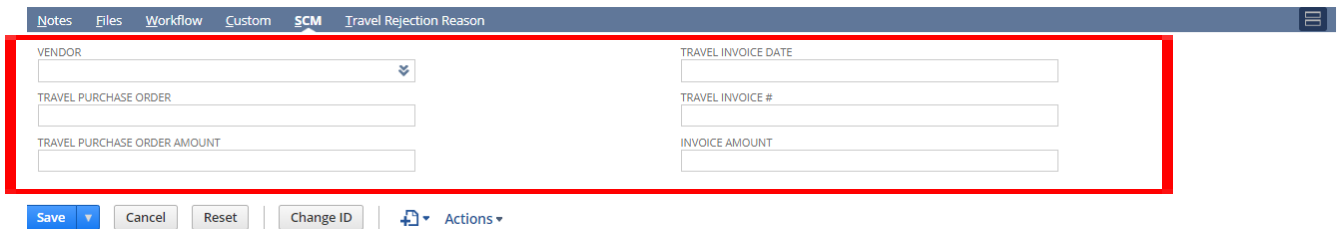
[New Note](#) [Customise View](#)

EDIT	DATE	AUTHOR	TITLE	MEMO	DIRECTION	TYPE	REMOVE
No records to show.							

[Edit](#) [Back](#) [Actions](#)

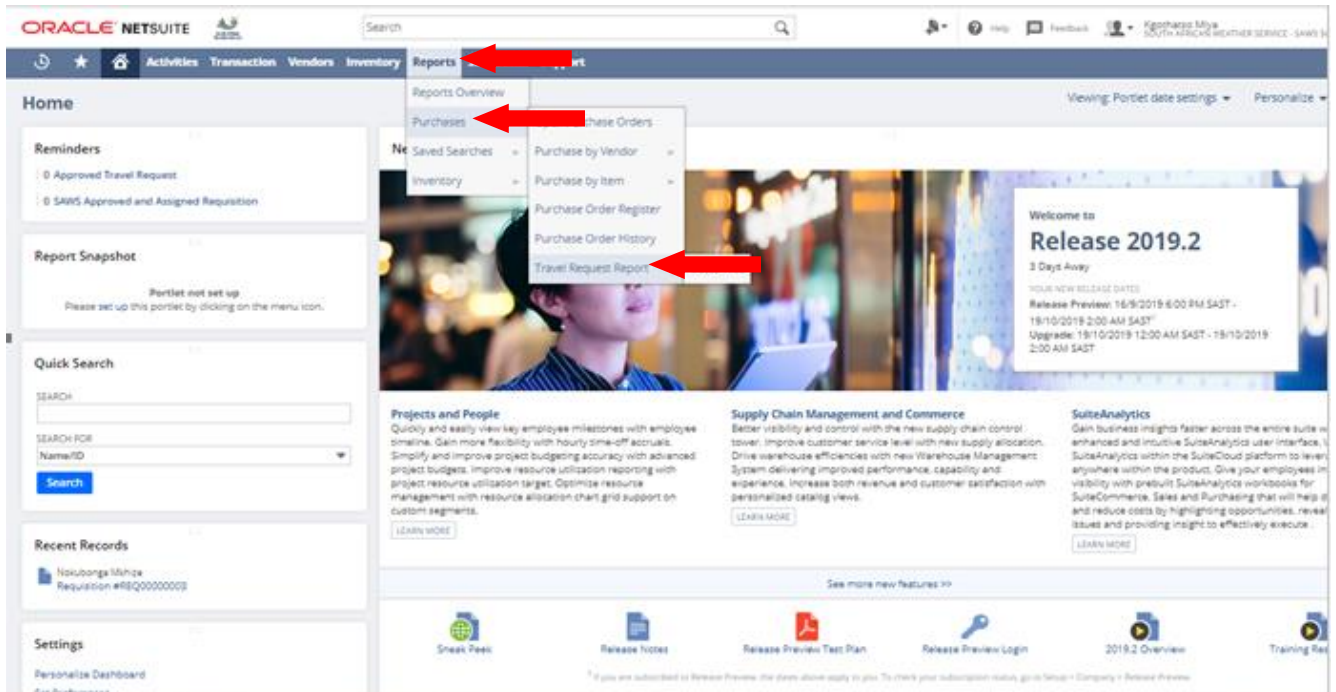
Update the following field as and when you obtain the information

- Travel Purchase Order Field – Type in the purchase order number
- Travel Purchase order amount field – Enter the travel purchase order amount
- Travel Invoice date field – Enter the invoice date
- Travel Invoice number field – Enter the invoice number
- Travel invoice amount field – Enter the invoice amount

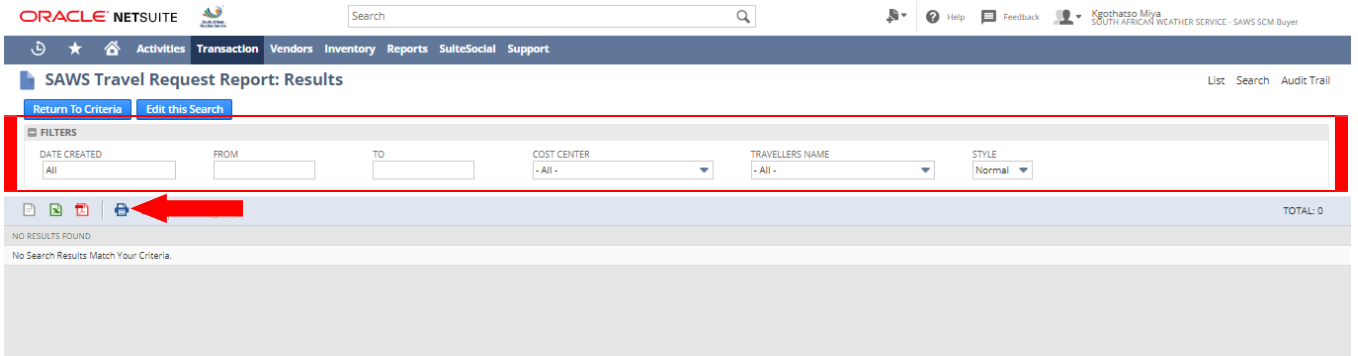


7 HOW TO PRINT A TRAVEL REQUEST REPORT

- On the menu, click on reports, purchase and then click on Travel Request Report.



- You can search using the travellers name, cost centre and date.
- Click on the Printer, to print the report.



ORACLE NETSUITE

Search

Activities Transaction Vendors Inventory Reports SuiteSocial Support

SAWS Travel Request Report: Results

Return To Criteria Edit this Search

FILTERS

DATE CREATED	FROM	TO	COST CENTER	TRAVELLERS NAME	STYLE
All			- All -	- All -	Normal

NO RESULTS FOUND

No Search Results Match Your Criteria.

TOTAL: 0