User Guide: How to submit a UniTask Travel Request (Domestic)

UniTask Travel Request DOES NOT have SAVE draft functionality

Prior to submitting a travel request: travellers must review the six steps to travel and comply with the UQ Travel Policy and Dual Purpose Travel Procedure.

Google Chrome is the recommended browser for UniTask

1. Accessing UniTask Travel Request
   - From the UQ Travel website (travel.uq.edu.au) select Travel Approval and Booking / UniTask Travel Request (approval)
   - Select New request
   - Search and select Travel request

2. Request details
   - Select the relevant options

3. Approval
   - Active approval is generally NOT required for domestic travel. UQ staff must discuss their travel plans with their supervisor prior to submitting a travel request. Check UQ Travel website for latest travel updates.

4. Traveller details
   - If Are you the person travelling? = NO (see Request details section)
   - Select traveller type: UQ Staff / Non UQ person
     - If traveller is UQ staff, select Search User
       - Search for UQ staff member (not all fields required)
       - Select traveller
       - Select the traveller’s School/Institute/Business Unit from drop down
     - If traveller is a non UQ person, complete the required traveller’s details

5. Trip details
   - Select Primary reason for travel (meaning the main reason) from the drop down. Only one (1) primary reason can be selected.

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- If email address added, traveller will receive the approval email.
- Leave blank if approval email is not to be sent to the traveller (Non UQ person)

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If Adding a location to approved trip is selected, Existing UniTask Trip ID must be entered in the field provided.

Adding a location to approved trip, should only be used when a trip has already been approved and traveller is now adding a new (additional) destination/s.

If Will field work be undertaken during the travel? = YES

UQ Safe Field Trip Reference ID must be entered.

Provide a summary of trip, noting all UQ business activities.

Select Trip type

Return: single business destination e.g. Brisbane-Melbourne-Brisbane

One-way: to/from one business destination e.g. Melbourne-Brisbane

Multi-city: multiple business destinations

Departure/Arrival destinations, search by entering city/town name and select from drop down.

Complete date fields, this is the departure date from the departure (city/town), total number of nights will calculate.

Exception: date of final leg is date of arrival into final destination, in the example above 15/10/2022 is arrival into Brisbane.

If Traveller type = UQ staff

Select Yes/No if trip includes private days.

Does your trip include any private days during the UQ business trip? (required)

If Yes, private days included, enter the number of private nights.

6. Dual purpose travel

Dual purpose travel (private days during the UQ business trip) may be allowed if the private days are:

- only in the business location (city/town); AND
- total private days must be less than total business days.

Do not include details of private holidays prior to, or after, a UQ business trip.

Complete dual purpose travel diary as a record of business and private travel activity/s undertaken (includes travel days to/from destinations).

Select Activity from drop down for each location and date range.

For more detailed Dual purpose examples refer to Dual Purpose Travel Quick Reference Guides.

7. Travel diary

A travel diary is required for Multi-city trips. If Multi-city with private days, the Dual purpose travel section replaces the Travel diary.

Complete travel diary as a record of travel activity/s undertaken (includes travel days to/from destinations).

Select Activity from drop down for each location and date range.

For more detailed Dual purpose examples refer to Dual Purpose Travel Quick Reference Guides.
8. **Budget**

- Select Expense Type/s from the drop down

<table>
<thead>
<tr>
<th>Expense Type (required)</th>
<th>$ amount (required)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airfare</td>
<td>490</td>
</tr>
<tr>
<td>Accommodation</td>
<td>620</td>
</tr>
</tbody>
</table>

- Enter the estimated expense amount/s in AUD

**Travel allowance** can be entered as ‘other’ expense type, write travel allowance and enter AUD amount

<table>
<thead>
<tr>
<th>Expense Type (required)</th>
<th>$ amount (required)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>500</td>
</tr>
</tbody>
</table>

- Select how the travel will be funded from drop down

**If UQ funded**, provide Chart String/s and $ allocation/s

<table>
<thead>
<tr>
<th>Chart String (required)</th>
<th>$ allocation (required)</th>
</tr>
</thead>
<tbody>
<tr>
<td>8431109-01-126-41</td>
<td>1110</td>
</tr>
</tbody>
</table>

Contact your Finance Advisory team for Chart String information

**If Externally funded** (including personally funded) complete and provide $ allocation

<table>
<thead>
<tr>
<th>Any personal contribution? (required)</th>
<th>$ amount (required)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>610</td>
</tr>
<tr>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Any other external contribution? (required)</th>
<th>$ amount (required)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>500</td>
</tr>
<tr>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

Name of external organisation: (required)

ABC Research Institute

**Total external contribution:**

Total external contribution must equal total estimated expenses 1110

- If *Both UQ and externally funded* complete above 2 steps

- Select if booking with FCM Travel Solutions, if Yes, select to send approved Travel Request to FCM

Will the travel booking be made with FCM Travel Solutions? (required)

- Yes
- No

Send approved Travel Request to FCM? (required)

- Yes
- No

Justification required for booking outside of FCM

Send *Travel Request to FCM* is a notification only, FCM take no action until contacted by traveller/booker to obtain a quote/booking.

If No is selected, the requester can send the Travel Request to FCM later via UniTask.

**Note:** UQ’s preferred booking method for domestic travel is via the online booking platform SAVI.

9. **Supporting documents**

- Attach documents to support your travel request

**Requirements may vary across local areas**

10. **Traveller declaration and Submit**

- Declaration will only appear if *requester is the traveller*

**Requester is traveller**

- Read and confirm declaration, *Submit*
- Travel request **notification** email sent to traveller and supervisor
- Request will appear in traveller’s my.UQ dashboard - My requests

**Requester on behalf of UQ staff**

- Requester *Submit*
- Travel request **notification** email sent to requester and traveller’s supervisor
- Traveller receives request to read and confirm traveller declaration and *Submit*
- Request will appear in requester’s and traveller’s my.UQ dashboard - My requests

**Requester on behalf of Non-UQ person**

Traveller declaration does not apply to Non UQ travellers

- Requester *Submit*
10. Book Travel

- When UniTask Travel Request approved, travellers and travel bookers can proceed with travel bookings
- Refer to the UQ Travel Six steps to travel

11. Finalise Request

Changes can only be made to Travel requests with the status: **Awaiting Finalisation**. Refer to the User Guide: How to change a UniTask Travel Request.

- From My requests dashboard, find the Travel request ID with **Awaiting finalisation** Status
- Select Update from the Action column
- If required, update and make any changes to the Approved Travel request

Adding a destination/location requires a new Travel request form to be completed (Primary reason for travel – Adding location to approved trip)

- Select
- Travel request is now Finalised
- Finalised Travel requests will appear in the Completed View

12. Resend Travel Request to FCM

- Travel requests can be resent to FCM when Status = Awaiting Finalisation or Finalised

13. Change a Request

Changes to the Travel request form can **only** be made by the **Requester** when:

- Status = Awaiting Finalisation; AND
- the Travel request is Assigned to the Requester in the UniTask dashboard
- Refer to the User Guide: How to change a UniTask Travel Request for more information
14. Withdraw a Request

A submitted Travel request must be withdrawn if:

- changes are made to the departure and or arrival locations;
- the planned travel is no longer taking place

Refer to the User Guide: How to change a UniTask Travel Request before Withdrawing a request.

A Travel request can only be Withdrawn by the Requester (or Traveller) if the Status is:

- Waiting finalisation

- Travel requests will appear in the Requesters Unitask My request dashboard under View Active

Find the Travel request to withdraw, select Update

Under the Audit tab, select Withdraw request

The Travel request is now withdrawn

Withdrawn Travel requests will appear in the Completed View