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

UniTask Travel Request DOES NOT have SAVE draft functionality

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. Lead traveller details

- If Are you the lead traveller? = NO (see Request details section)
- Select traveller type: UQ Staff / Non UQ person
  - [Select an option]
  - UQ staff
  - Non UQ person

- If traveller is UQ staff, select Search User
  - [Search User]
  - Search for UQ staff member (not all fields required)
  - Select traveller

  - [User name]
  - [First name]
  - [Last name]
  - [Email]
  - [Job title]
  - [Default org unit]

- Select the traveller’s School/Institute/Business Unit from drop down
  - If traveller holds multiple positions, select position associated with the travel

- If lead traveller is a non UQ person, complete the required traveller’s details

  - [Traveler first name]: (required)
  - [Traveler last name]: (required)
  - [Email]: NOT MANDATORY

5. Group details

- Complete group details, total number of people will populate

- [Name your group]: (required)
  - [BEL Moot - United Kingdom]

- [Traveler breakdown]
  - [No. of UQ Staff]: (required)
    - 2
  - [No. of UQ Students]: (required)
    - 12
  - [No. of Non-UQ]: (required)
    - 0

- Total number of people travelling
  - 14
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- Attach completed list of travellers (spreadsheet preferred). List can be attached at a later date but must be attached prior to finalising the Travel request. Final numbers must be updated at least 5 days prior to the trip departure date.

**Trip details**

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

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

- 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 e.g. Brisbane–Melbourne–Sydney–Brisbane

- 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

**Private travel** is not applicable. If a traveller plans to include private days they must complete a separate individual travel request.

6. **Travel diary**

- A travel diary will be required for multi-city trips.

- 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.

7. **Budget**

- Select *Expense Type/s* from the drop down (drop down differs for domestic and international travel)
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1. Enter the estimated expense amount/s in AUD

<table>
<thead>
<tr>
<th>Expense Type (required)</th>
<th>$ amount (required)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airfare (Economy)</td>
<td>21000</td>
</tr>
<tr>
<td>Accommodation</td>
<td>14200</td>
</tr>
</tbody>
</table>

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

2. 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>32500</td>
</tr>
</tbody>
</table>

**Total UQ costing**

**Total UQ costing must equal total Estimated expenses**

3. 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>32500</td>
</tr>
</tbody>
</table>

4. Contact your **Finance Advisory team** for Chart String information

5. If **Externally funded** (including personally funded) complete and provide $ allocation/s in AUD

<table>
<thead>
<tr>
<th>Any personal contribution? (required)</th>
<th>$ amount (required)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>10500</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>24700</td>
</tr>
<tr>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

**Total external contribution**

**Total external contribution must equal total Estimated expenses**

6. If **Both UQ and externally funded** complete above 2 steps

7. **Supporting documents**

- Attach documents to support your travel request

   **Requirements may vary across local areas**

8. **Traveller declaration and Submit**

   - Declaration will only appear if requester is the lead traveller

   - **Requester is lead traveller**

   - **Read and confirm declaration, Submit**

   - **Travel request notification** email sent to lead traveller and supervisor

   - **Request will appear in lead traveller’s my.UQ dashboard - My requests**

   - **Requester is not lead traveller**

   - **Submit**

   - **Travel request notification** email sent to requester and lead traveller’s supervisor

   - **Lead traveller receives request to read and confirm traveller declaration and Submit**

   - **Request will appear in requester’s and lead traveller’s my.UQ dashboard - My requests**

9. **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**

   **Travel requests must be finalised** by the Requester. It is recommended to finalise once all travel arrangements have been booked and/or 5 days prior to travel.

   A requester can, when finalising a request, make changes to all sections of the travel request with the exception of destinations or locations.
9. 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.

Travel requests must be finalised by the Requester. It is recommended to finalise once all travel arrangements have been booked and/or 5 days prior to travel. If travel is not taking place, the Travel request must be withdrawn.

- 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 (destinations and locations cannot be changed)

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

10. Resend Travel Request to FCM

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

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

11. 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

12. Withdraw a Request

A submitted Travel request must be withdrawn if:

- changes are made to the departure and or arrival locations; or
- 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:

- Awaiting 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