Travel Management Services
Governance and Risk

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

Group travel: 10 or more travellers with the same itinerary.
Prior to submitting a travel request: travellers must review the six steps to travel and comply with the UQ Travel Policy

Google Chrome is the recommended browser for UniTask

NOTE: You can save data entered into a form and return later by clicking Save data and return later at the bottom of the form.

You can only fill out one form at a time. The saved form will not display in your My Requests dashboard until the form is submitted (See Accessing UniTask Travel Request section for accessing a saved travel request).

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
   ➔ If you do not have a saved travel request, continue to step 2. Request details.

2. Request details
   ➔ Select the relevant options
   Type of travel (required)
   - Domestic
   - International
   Is this a group booking for 10 or more people with the same itinerary?
   - Yes
   - No
   Are you the person travelling? (required)
   - Yes
   - No

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

To complete a saved travel request, select Load saved data

You cannot submit a new travel request and retain saved data, if you select Start new form, the previously saved data will be lost.

Continue previous session

The system has found saved data on this form. To restore the saved data select Load saved data. If you select Start new form the saved data will be cleared and you will not be able to restore the saved data at a later time. Do you want to load saved data?

Last saved time: Monday, 20 Feb 2023, 11:11

Load saved data
Start new form
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5. Group details
- Complete group details, total number of people will populate

6. 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.

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

If traveller holds multiple positions, select position associated with the travel

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)

If Will field work be undertaken during the travel? = YES
- UQ Safe Field Trip Reference ID must be entered

If field work will be undertaken during the travel
- 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, start typing the relevant Departure/Arrival location name (city/town) and select from the drop down option/s.

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

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

Select the traveller’s School/Institute/Business Unit from drop down

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

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.

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

Adding 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.
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- 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 (all dates must be accounted for)
- Form will not Submit if each Location is not allocated an activity (including departure and arrival location, in example below Brisbane)

### 8. Budget

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

**Travel allowance** can be entered in as ‘other’ expense type, write travel allowance and enter AUD amount. To be paid a Travel allowance, you must submit a Travel allowance expense claim in **Promaster**.

- Select how the travel will be funded from drop down

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

### 9. Supporting documents

- Attach documents to support your travel request

**Requirements may vary across local areas**

### 10. Traveller declaration and Submit

- Read and confirm declaration, **Submit**
- Travel request notification email sent to lead traveller and supervisor (NO action required by supervisor)
- Request will appear in lead traveller’s my.UQ dashboard - My requests
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**Requester is not lead traveller**
- Requester Submit
- Travel request notification email sent to requester and lead traveller’s supervisor (NO action required by 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

**11. 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

**12. 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

**Additional steps (if required after submission):**

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

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

- Find the Travel request to send to FCM, select Update
- Under the Audit tab, select Send to FCM

The approved Travel request is now emailed to FCM

If status is Finalised
- Finalised Travel requests will appear in the Requesters Unitask My request dashboard under View Completed

- Find the Travel request to send to FCM, select View
- Under the Audit tab, select Send to FCM

The approved Travel request is now emailed to FCM
To 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

To 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 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 Unitask My request dashboard under View Completed