THE UNIVERSITY OF QUEENSLAND AUSTRALIA | CREATE CHANGE

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.

Submit   Save data and return later

⚠ 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).
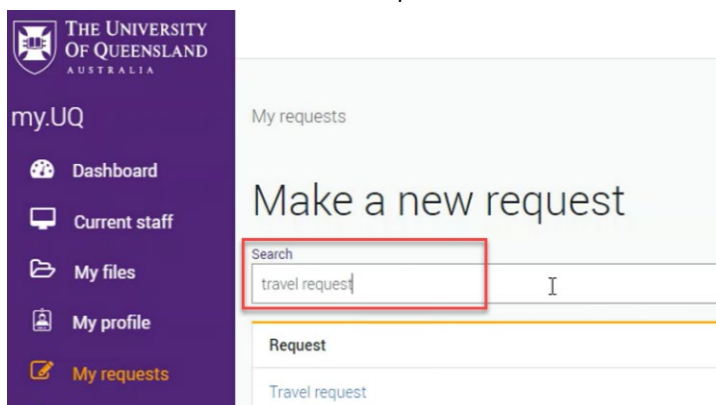
1. Accessing UniTask Travel Request

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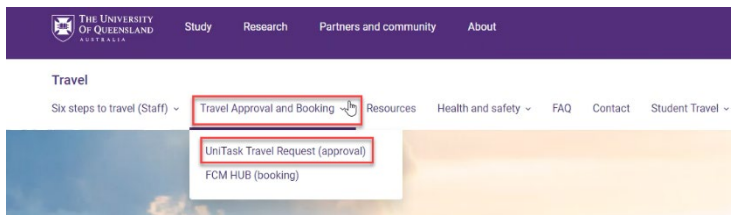
✈ Select *New request*
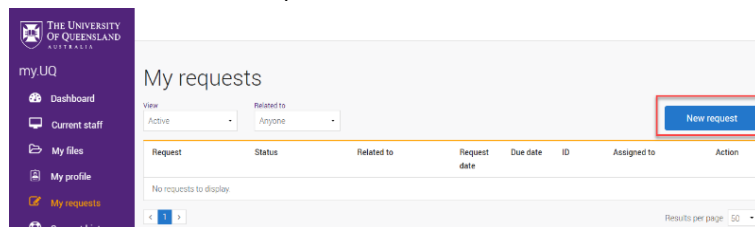
✈ Search and select *Travel request*

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

✈ 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

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.
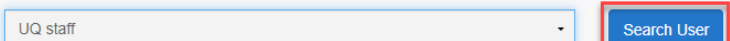
4. Lead traveller details

✈ If *Are you the lead traveller?* = NO (see Request details section)
✈ Select traveller type: *UQ Staff / Non UQ person*

Select an option   ▼
UQ staff
Non UQ person
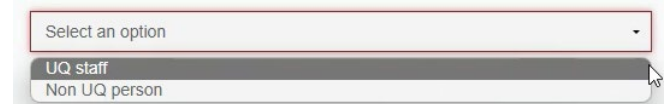
✈ If traveller is UQ staff, select *Search User*

UQ staff   ▼   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	
	jodi	walton				Search

User name	First name	Last name	Email	Job title	Default org unit	
uqjwalt3	Jodi	Walton	staging.unitask@uq.edu.au	University Travel Risk Manager	Enterprise Risk Services	Select

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

Select an option

Enterprise Risk Services (University Travel Risk Manager)

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

Traveller first name: (required)

Traveller last name: (required)

Email: NOT MANDATORY

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)

5. Group details

→ Complete group details, total number of people will populate

Name your group: (required)	BEL Moot - United Kingdom	
Traveller breakdown		
No. of UQ Staff (required)	No. of UQ Students (required)	No. of Non-UQ (required)
2	12	0
Total number of people travelling	14	

→ 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.**

Attach your list of travellers:

Remove

6. Trip details

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

Primary reason for travel: (required)

Select an option

Academic collaboration
Adding location to approved trip
Attend meeting/event
Attend conference/seminar
Fieldwork/trip
Professional development
Research
Site visit/inspection
Teaching
University duties

Will field work be undertaken during the travel? (required)

PRIMARY travel destination (country): (required)

Selected PRIMARY travel destination (country): (required)

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

Primary reason for travel: (required)   Adding location to approved trip

Existing Trip ID: (required)

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

Will field work be undertaken during the travel? (required)   ● Yes   ○ No

UQ Safe Field Trip Reference ID: (required)

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

Provide a summary of trip : (required)

→ Select *Trip type*

○ Return
○ One-way
○ Multi-city

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.

Departure (city/town) (required)	Arrival (city/town) (required)
Brisbane City, Queensland, Australia ✕	Melbourne, Victoria, Australia ✕

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

Departure (city/town) (required)	Arrival (city/town) (required)	Date (required)
Brisbane City, Queensland, Australia ✕	Melbourne, Victoria, Australia ✕	11/10/2022
Melbourne, Victoria, Australia	Brisbane City, Queensland, Australia	15/10/2022
Total number of nights away:	4	

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.

➔ 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

Contact your Finance Advisory team for Chart String information

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

➔ 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

Justification required for booking outside of FCM

Send *approved* 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.

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 lead traveller

Requester is lead traveller

➔ 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

Requester is not lead traveller

- ✈ Requester *Submit*
- ✈ Travel request <u>notification</u> 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 <u>approved</u>, travellers and travel bookers can proceed with travel bookings
- ✈ Refer to the <u>UQ Travel Six steps to travel</u>

12. Finalise Request

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

Travel requests <u>must be finalised</u> 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

Request	Status	Related to	Request date	Due date	ID	Assigned to	Action
Travel request	Awaiting finalisation	Me	20 Oct 2022	29 Oct 2022	642055	Me	Update

- ✈ 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 [Finalise request]
- ✈ Travel Request is now Finalised
- ✈ Finalised Travel requests will appear in the Completed View

My requests

My requests

Request	Status	Related to	Request date	Due date	ID	Assigned to	Action
Travel request	Finalised	Me	20 Oct 2022	21 Oct 2022	642055		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

My requests

Request	Status	Related to	Request date	Due date	ID	Assigned to	Action
⊗ Travel request	Awaiting finalisation	Katrina Green	30 Aug 2022	04 Sep 2022	639002	Me	Update

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

⊕ Audit

[Confirm request]
[Send to FCM]
[Withdraw request]

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

My requests

My requests

Request	Status	Related to	Request date	Due date	ID	Assigned to	Action
Travel request	Finalised	Me	20 Oct 2022	21 Oct 2022	642055		View

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

⊕ Audit

Send a copy of the approved travel request to FCM.

[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