

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

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

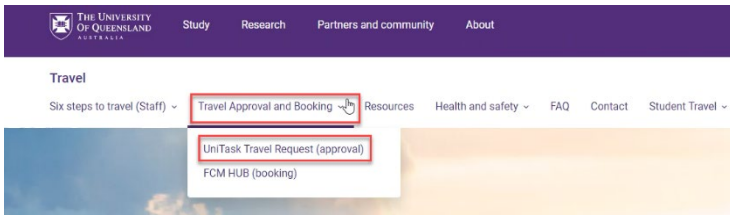
NOTE: You can save data entered into a form and return later by clicking *Save data and return later* at the bottom of the form.



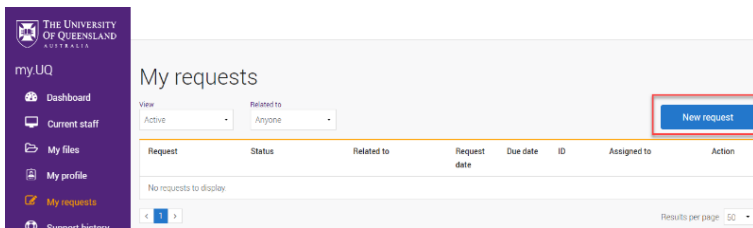
You can only fill out one form at a time. The saved form will not display in your My Requests dashboard until the form is submitted (See Accessing UniTask Travel Request section for accessing a *saved* travel request).

1. Accessing UniTask Travel Request

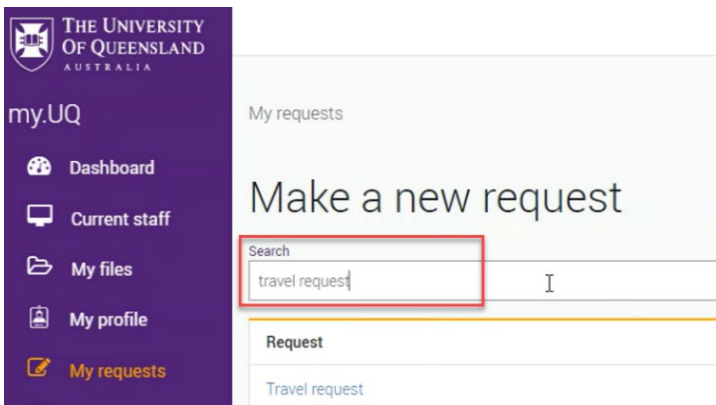
→ From the [UQ Travel website](http://travel.uq.edu.au) (travel.uq.edu.au) select *Travel Approval and Booking / UniTask Travel Request (approval)*



→ 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

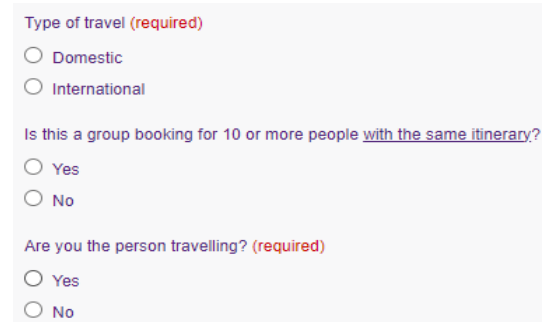
The system has found saved data on this form. To restore the saved data select *Load saved data*. If you select *Start new form* the saved data will be cleared and you will not be able to restore the saved data at a later time. Do you want to load saved data?

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



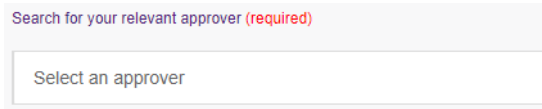
2. Request details

→ Select the relevant options



3. Approval

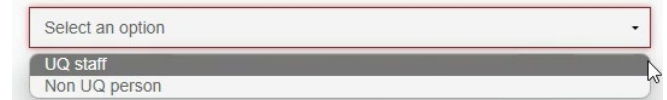
→ Search for your relevant travel approver by name. **Refer to your local area for guidance if you are unsure.**



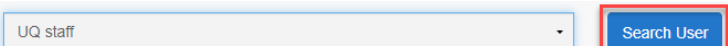
4. Lead traveller details

→ 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

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User name	First name	Last name	Email	Job title	Default org unit	
	jodi	walton				<input type="button" value="Search"/>

User name	First name	Last name	Email	Job title	Default org unit	
ujq/walt3	Jodi	Walton	staging.unitask@uq.edu.au	University Travel Risk Manager	Enterprise Risk Services	<input type="button" value="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)

Traveller breakdown

No. of UQ Staff (required)	No. of UQ Students (required)	No. of Non-UQ (required)
<input type="text" value="2"/>	<input type="text" value="12"/>	<input type="text" value="0"/>
Total number of people travelling		<input type="text" value="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:

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)

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

PRIMARY travel destination (country): (required)

Selected PRIMARY travel destination (country): (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

- ➔ 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)

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)

- ➔ *Primary travel destination* (meaning the main **country**), search by entering the name of the country and select from the drop down

PRIMARY travel destination (country): (required)

Selected PRIMARY travel destination (country): (required)

- ➔ Complete the following, noting all UQ business activities

Provide a summary of trip : (required)

Explain how the requested travel aligns to UQ objectives and strategic priorities and why the requested travel is the only viable way to achieve the business/academic objective: (required)

- ➔ Select *Trip type*

Return

One-way

Multi-city

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

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


Multi-city: multiple business destinations e.g. Brisbane-London-Paris-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)

- ➔ Search [DFAT Smartraveller](#) website for travel advice level of all arrival destinations
- ➔ Select correct travel advice level

 **Additional high risk approval** required for travel advice levels *Do not travel, Reconsider your need to travel* and *No advice issued*.

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Arrival location DFAT Smartraveller travel advice level (required)

Select an option

- Do not travel
- Reconsider your need to travel
- Exercise high degree of caution
- Exercise normal safety precautions
- No advice issued
- N/A - Australia

N/A – Australia is to be used when Australia is the Arrival (city/town)

Departure (city/town) (required): Brisbane City, Queensland, Australia

Arrival (city/town) (required): London, England, United Kingdom

Arrival location DFAT Smartraveller travel advice level (required): Exercise normal safety precautions

Date (required): 08/10/2022

Departure (city/town) (required): London, England, United Kingdom

Arrival (city/town) (required): Brisbane City, Queensland, Australia

Arrival location DFAT Smartraveller travel advice level (required): N/A - Australia

Date (required): 15/10/2022

Total number of nights away: 7

➔ 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 days 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 (regardless of nights away)
- One-way trips/return trips (6 nights and over)

- ➔ 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)

Activity (required)	Location (required)	Start Date (required)	End Date (required)
Travel from normal place of work to	Brisbane City, Queensland, Australia	08/10/2023	09/10/2023
Attend conference/seminar	London, England, United Kingdom	10/10/2023	13/10/2023
Travel from business location to no	London, England, United Kingdom	14/10/2023	18/10/2023

8. High risk destination

High risk travel will not be approved without evidence of careful planning and justification.

➔ Complete the following sections in detail

Is the travel essential and why can't the business objective be achieved via other means or in another destination? Detail benefits travel will provide to UQ or opportunity cost if travel is not undertaken.

What are the main risks associated with the travel? Detail how the risks will be managed and/or mitigated. Consider personal health and safety risk as well as reputational/strategic risks to UQ.

What passport will you travel on? Detail and additional information regarding visas, entry/exit requirements for all destination/s.

➔ Attach any supporting documentation that helps justify the trip

9. Budget

➔ Select **Expense Type/s** from the drop down

Expense Type (required)

Select an option

- Airfare (Economy)
- Airfare (Premium Economy)
- Airfare (Business Class)
- Accommodation
- Meals
- Incidentals
- Transport
- Other

If **Airfare Premium Economy or Business Class** is selected, additional justification is required as per [Travel Policy Section 2.5](#).

➔ Enter the estimated expense amount/s in AUD

Expense Type (required): Airfare (Economy) \$ amount (required): 21000

Expense Type (required): Accommodation \$ amount (required): 14200

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](#).

Expense Type (required): Other \$ amount (required): 500

Other (required): Travel allowance

➔ Select how the travel will be funded from drop down

How will travel be funded (required): Select an option

- UQ funded
- Externally funded
- Both UQ and externally funded

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

Chart String (required): 8431109-01-126-41 \$ allocation (required): 32500

Add additional chart string

Total UQ costing: 32500

Total UQ costing must equal total Estimated expenses

Contact your [Finance Advisory team](#) for Chart String information

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

Is there any personal contribution? (required) \$ amount (required): 10500

Is there any external contribution? (required) \$ amount (required): 24700

Name of external organisation: (required)

Total external contribution: 35200

Total external contribution must equal total Estimated expenses

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- ➔ 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 **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.

10. Supporting documents

- ➔ Attach documents to support your travel request

Requirements may vary across local areas

11. 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)
- ➔ Travel request approval required email sent to **Travel Approver**
- ➔ Request will appear in lead traveller's my.UQ dashboard - My requests

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**
- ➔ Travel request approval required email sent to **Travel Approver**
- ➔ Request will appear in requester's and lead traveller's my.UQ dashboard - My requests

12. 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

13. Finalise Request

⚠ Changes can only be made to Travel requests with the Status: **Awaiting Finalisation** or **More information required**. 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

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	<u>Update</u>

- ➔ 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

My requests

View: Related to:

Request	Status	Related to	Request date	Due date	ID	Assigned to	Action
Travel request	Completed	Me	20 Oct 2022	21 Oct 2022	642055	Me	<u>View</u>

Additional steps (if required after submission):

Resend Travel Request to FCM

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

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If status is Awaiting Finalisation

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

My requests

View: Active Related to: Anyone New request

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

View: Completed Related to: Anyone New request

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

- ➔ 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 or More information required; 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:

- ➔ the Primary destination has changed;
 - ➔ 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; or
- ➔ More information required

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

My requests

View: Active Related to: Anyone New request

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 withdraw, select Update
- ➔ Under the Audit tab, select Withdraw request

Audit

Confirm request

Send to FCM

Withdraw request

- ➔ The Travel request is now withdrawn
- ➔ Withdrawn Travel requests will appear in the Unitask My request dashboard under View Completed