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.

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.

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? (required)
       - Yes
       - No
   - Are you the person travelling? (required)
     - Yes
     - No

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.

3. Approval
   - 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 for UQ staff member (not all fields required)
   - Select traveller

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

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? (required)
       - Yes
       - No
   - Are you the person travelling? (required)
     - Yes
     - No

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 for UQ staff member (not all fields required)
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5. **Group details**
   - Complete group details, total number of people will populate
     
     Name your group (required): BEL Mood - 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.**

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):
     
     - Academic collaboration
     - Adding location to approved trip
     - Private travel
     - 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

   - **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

   - **Provide a summary of trip, noting all UQ business activities**

   - **Select **Trip type**
     
     - Return
     - One-way
     - Multi-city

   - **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

     - Departure date (required): Brisbane City, Queensland, Australia
     - Departure date (required): Melbourne, Victoria, Australia
     - Arrival date (required): 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.
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1. Complete travel diary as a record of travel activity/s undertaken (includes travel days to/from destinations)
2. Select Activity from drop down for each Location and date range (all dates must be accounted for)
3. Form will not Submit if each Location is not allocated an activity (including departure and arrival location, in example below Brisbane)

8. Budget

1. Select Expense Type/s from the drop down (drop down differs for domestic and international travel)
2. Enter the estimated expense amount/s in AUD
3. 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 ExpenseMe Pro.
4. 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</th>
<th>$ allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td>8431109-01-126-41</td>
<td>32500</td>
</tr>
</tbody>
</table>

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

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

1. 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
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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

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.

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