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

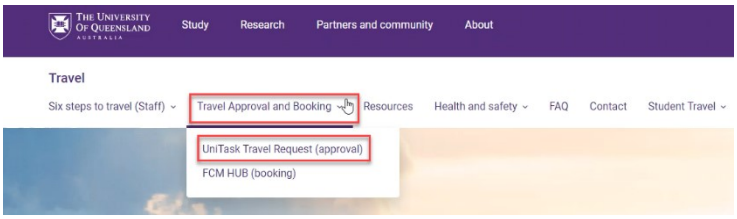
Google Chrome is the recommended browser for UniTask

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.

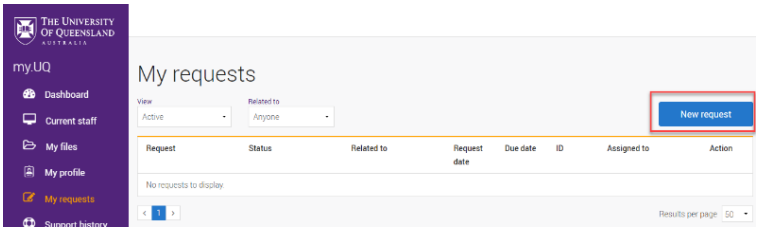
⚠ You can only fill out one form at a time. The saved form will not display in your My Requests dashboard until the form is submitted (See Accessing UniTask Travel Request section for accessing a *saved* travel request).

1. Accessing UniTask Travel Request

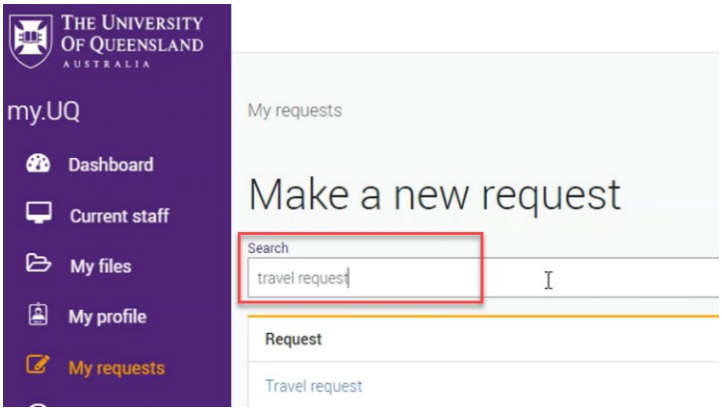
- From the UQ Travel website (travel.uq.edu.au) select *Travel Approval and Booking / UniTask Travel Request (approval)*



- Select *New request*



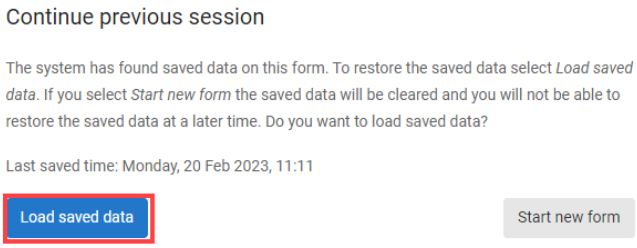
- Search and select *Travel request*



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

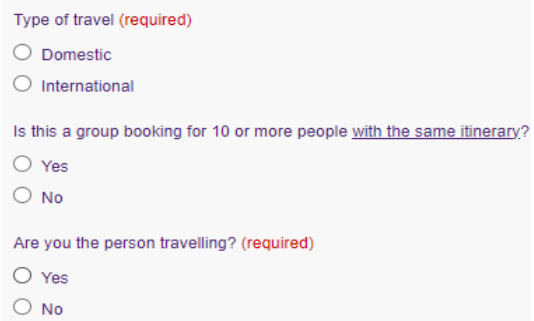
- To **complete** a *saved* travel request, select *Load saved data*

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



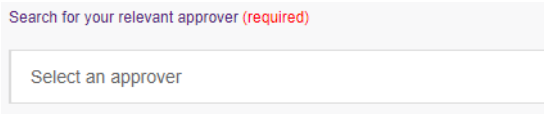
2. Request details

- Select the relevant options



3. Approval

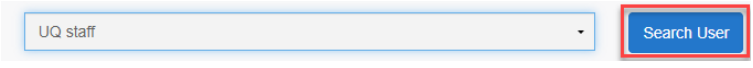
- Search for your relevant travel approver by name. **Refer to your local area for guidance if you are unsure**.



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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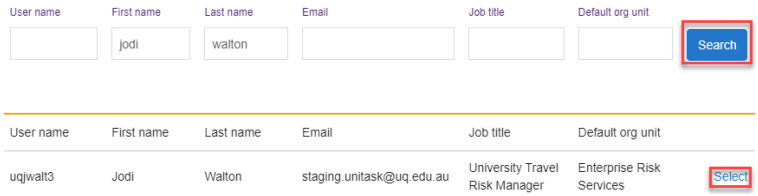
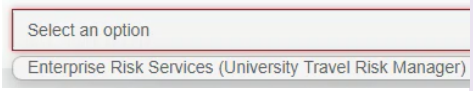


- Select the traveller's School/Institute/Business Unit from drop down



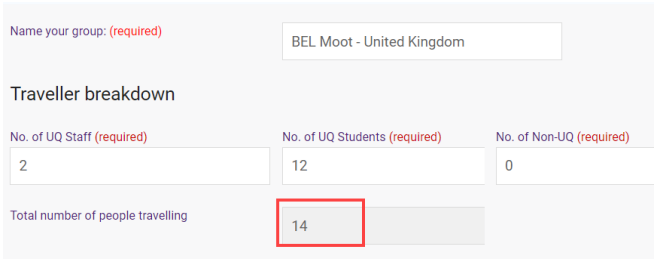
If traveller holds **multiple positions**, select position associated with the travel

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

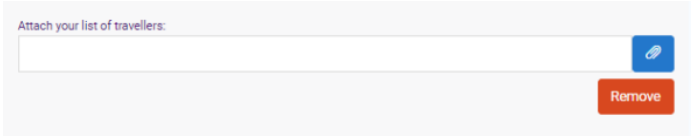
If email address added, traveller will receive the approval email. Leave blank if approval email is not to be sent to the traveller (Non UQ person)

5. Group details

- Complete group details, total number of people will populate

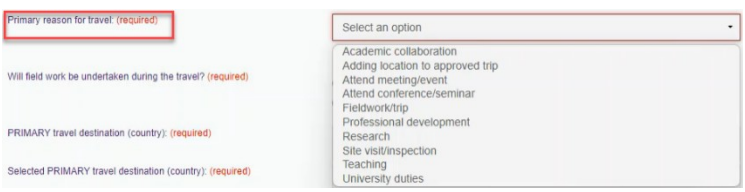


- Attach completed list of travellers (spreadsheet preferred). List can be attached at a later date but must be attached prior to finalising the Travel request. **Final numbers must be updated at least 5 days prior to the trip departure date.**

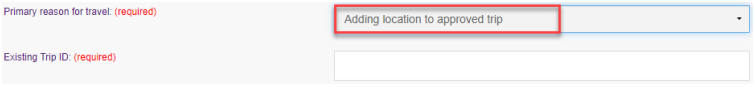


6. Trip details

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

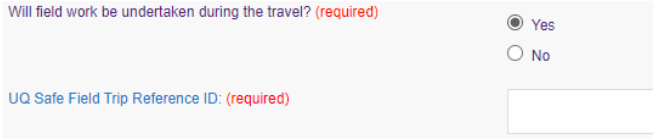


- If Adding a location to approved trip is selected, Existing UniTask Trip ID must be entered in the field provided

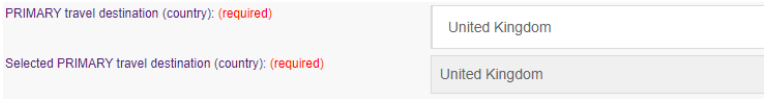


Adding a location to approved trip, should only be used when a trip has already been **approved** and traveller is now adding a new (additional) destination/s.

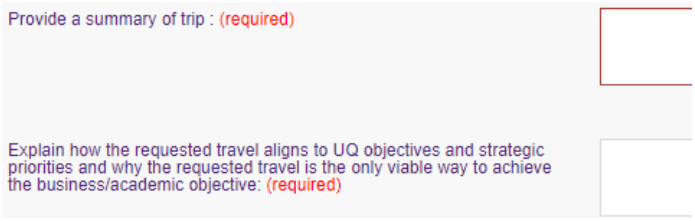
- If *Will field work be undertaken during the travel?* = YES
- *UQ Safe Field Trip Reference ID* must be entered



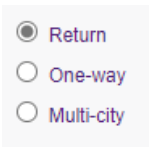
- *Primary travel destination* (meaning the main **country**), search by entering the name of the country and select from the drop down



- Complete the following, noting all UQ business activities

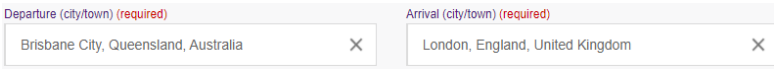


- Select *Trip type*



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.



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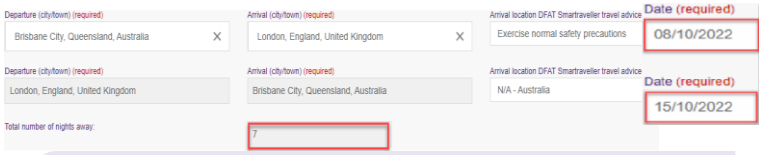
N/A – Australia is to be used when Australia is the *Arrival (city/town)*

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



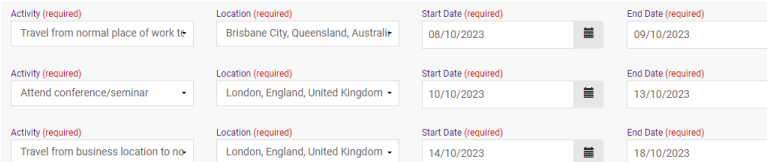
Exception: date of final leg is date of arrival into *final destination,* in the example above 15/10/2022 is arrival into Brisbane

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)

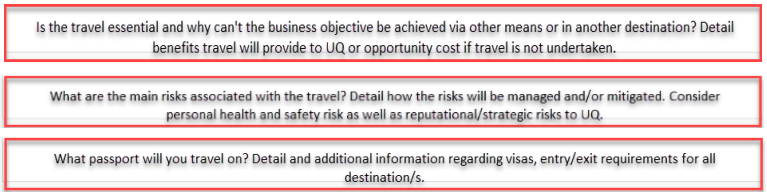
- Complete travel diary as a record of travel activity/s undertaken (includes travel days to/from destinations)
- Select *Activity* from drop down for each Location and date range (all dates must be accounted for)
- Form will not Submit if each Location is not allocated an activity (including departure and arrival location, in example below Brisbane)



8. High risk destination

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

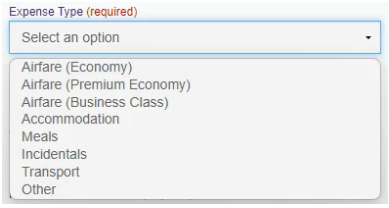
- Complete the following sections in detail



- Attach any supporting documentation that helps justify the trip

9. Budget

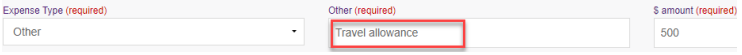
- Select *Expense Type/s* from the drop down



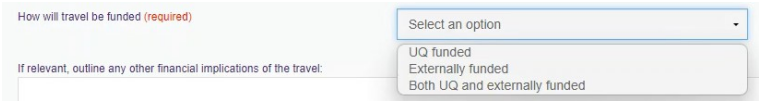
If ***Airfare Premium Economy*** *or* ***Business Class*** is selected, additional justification is required as per UQ Travel Policy Clause (22).

- Enter the estimated expense amount/s in AUD

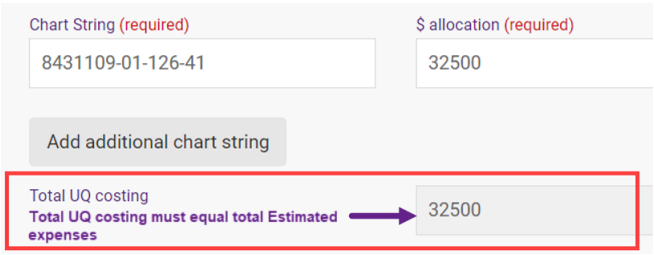
Travel allowance can be entered in as '*other*' expense type, write travel allowance and enter AUD amount. To be paid a Travel allowance, you must submit a Travel allowance expense claim in ExpenseMe Pro.



- Select how the travel will be funded from drop down

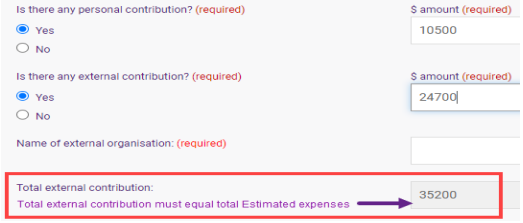


- If ***UQ funded***, provide Chart String/s and $ allocation/s



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.

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

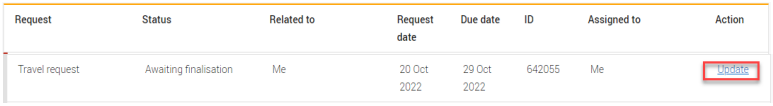
- When UniTask Travel Request approved, travellers and travel bookers can proceed with travel bookings
- Refer to the UQ Travel Six steps to travel

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.

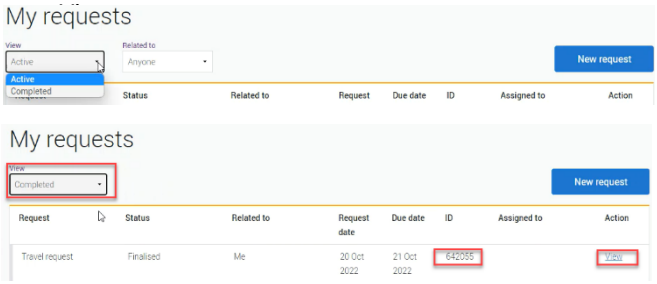
- From My requests dashboard, find the Travel request ID with *Awaiting finalisation* Status
- Select Update from the Action column



- 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



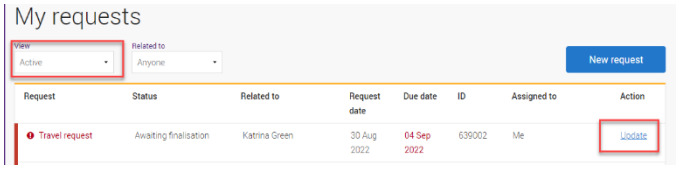
Additional steps (if required after submission):

Resend Travel Request to FCM

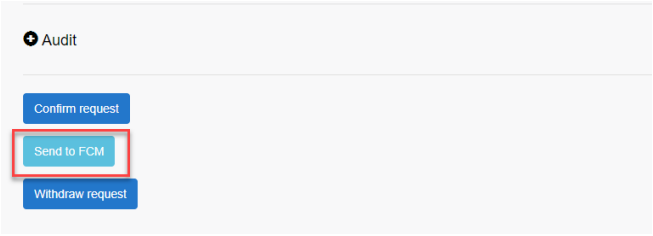
- Approved Travel requests can be resent to FCM when Status = Awaiting Finalisation or Finalised

If status is Awaiting Finalisation

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



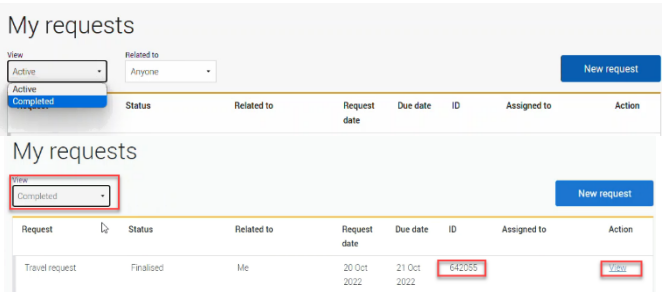
- Find the Travel request to send to FCM, select Update
- Under the Audit tab, select Send to FCM



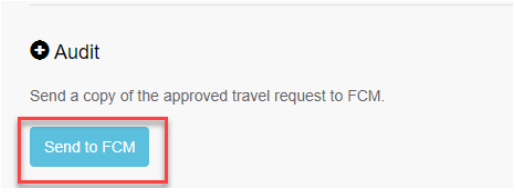
- The approved travel request is now emailed to FCM

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 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:

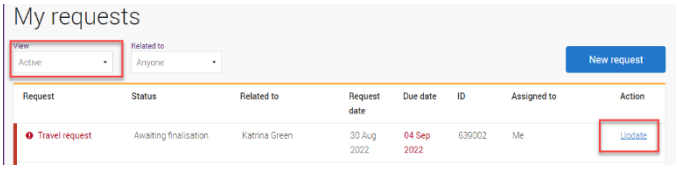
- the Primary destination has changed;
- changes are made to the departure and or arrival locations; or
- the planned travel is no longer taking place

Refer to the User Guide: How to change a UniTask Travel Request before Withdrawing a request.

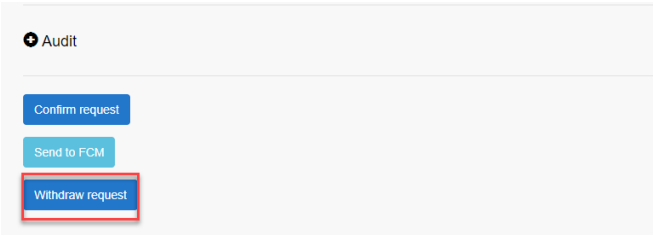
A Travel request can only be Withdrawn by the Requester if the Status is:

- Awaiting finalisation; or
- More information required

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



- 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