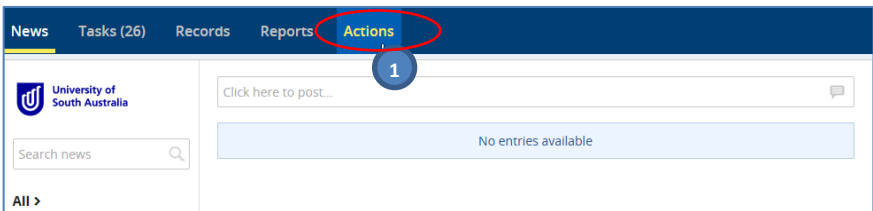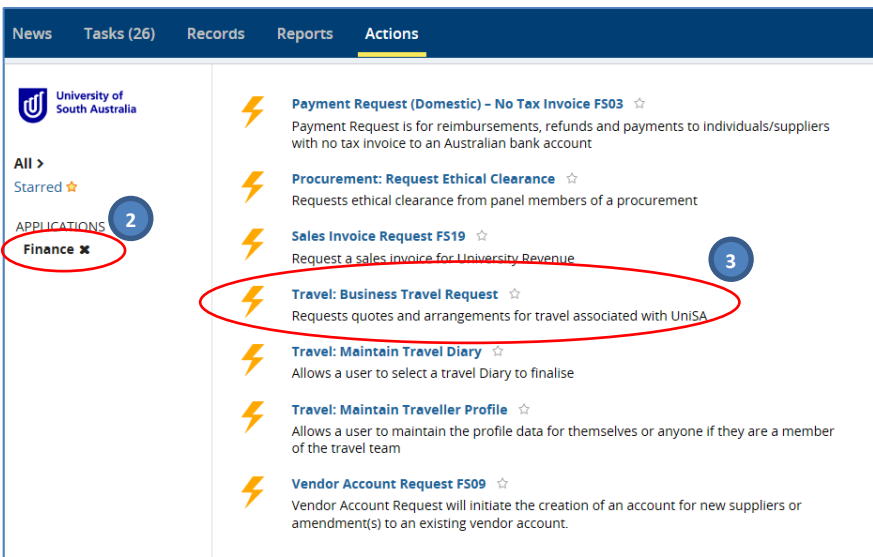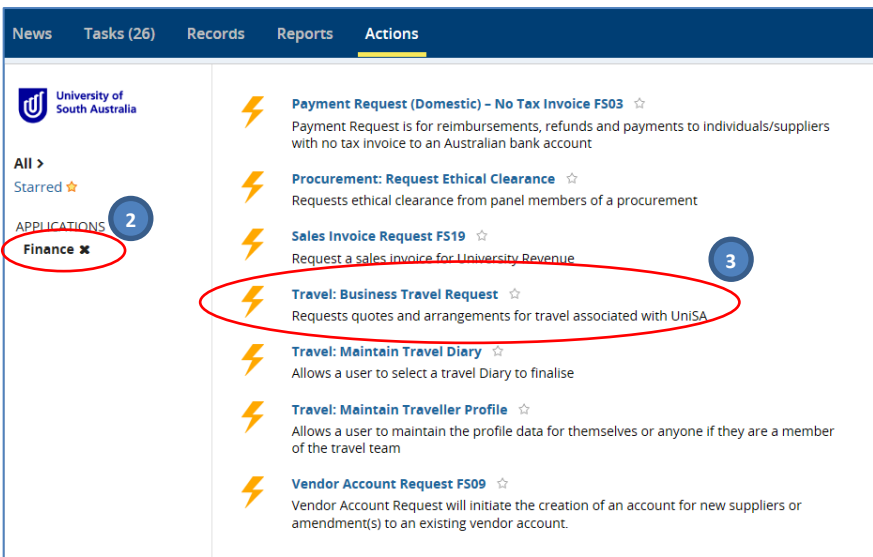# Quick Reference Guide
Business Travel Request (BTR) Form

Purpose   This guide provides an overview on how to complete a travel request form for the purpose of booking travel with the University's Travel Team.
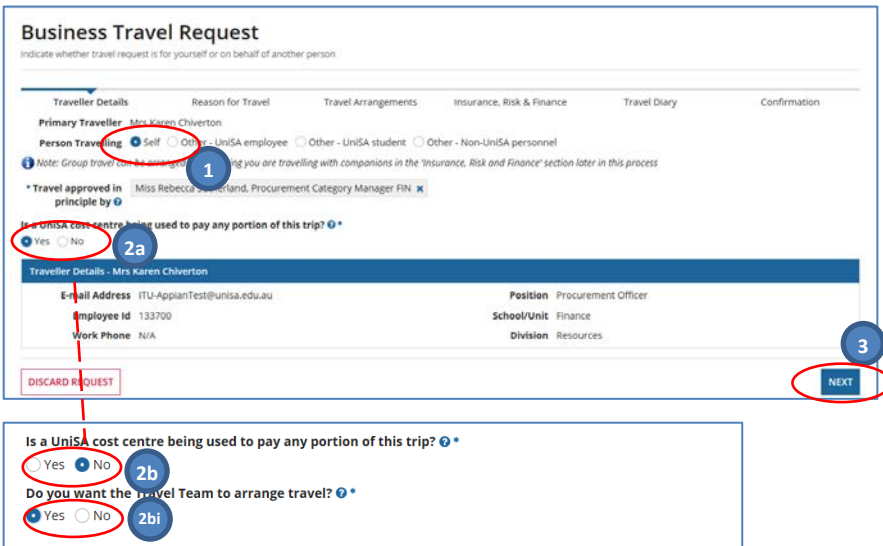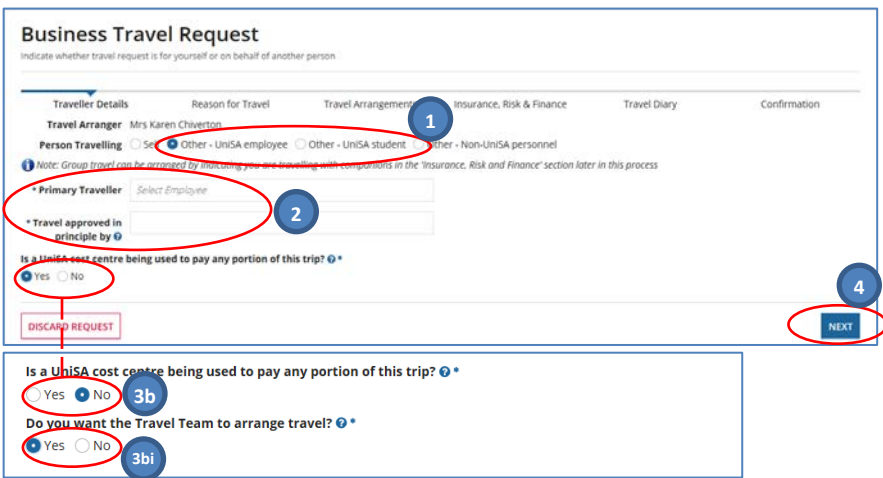
References   Refer to the Travel Guidelines on the Finance Website.

Launch the Form in Appian

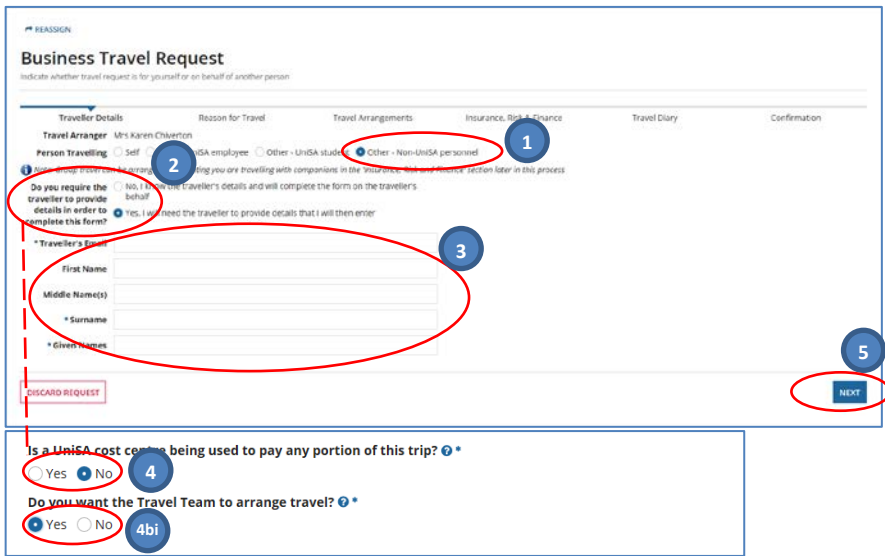| Launching the Form	To access the BTR Form, click on the following link from the Appian environment: https://bpi.unisa.edu.au/suite/tempo/actions/view/all Use your University Network ID and password to enter into the site
1. Click in 'Actions' button on the menu bar.	
2. Click on 'Finance' on the left-hand menu to filter to Finance Unit forms. 3. Click on the link for Travel: Business Travel Request.	

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Traveller Details

Person Travelling: Self	Completing a BTR on behalf of yourself

1. Select 'Self' radial button.

2. Select if a UniSA Cost Centre is being used for the trip.
   a. If yes, select the 'Yes' radial button.
   b. If no, select the 'No' radial button.
      i. If you do not wish the Travel Team to arrange your travel, select the 'No' radial button and upload your itinerary.

3. Click the 'Next' button.

Person Travelling: Other - UniSA Employee/Student	Completing a BTR on behalf of another UniSA staff member or UniSA student

1. Select 'Other UniSA Employee' or 'Other - UniSA Student' radial button.

2. Enter the travellers name and ensure the approved in principle name is correct.

3. Select if a UniSA Cost Centre is being used for the trip.
   a. If yes, select the 'Yes' radial button.
   b. If no, select the 'No' radial button.
      i. If you do not wish the Travel Team to arrange your travel, select the 'No' radial button and upload your itinerary.

4. Click the 'Next' button.

Quick Reference Guide
Business Travel Request (BTR) Form

Person Travelling: Other - UniSA Non-UniSA personnel	Completing a BTR on behalf of non-UniSA personnel

1. Select 'Other - UniSA Non-UniSA personnel' radial button.
 	
2. Select if you require the travellers to provide details in order to complete the form.
   a. If yes, select the 'Yes' radial button.
   b. If no, select the 'No' radial button.
 	
3. Enter the requested details of the traveller
 	
4. If you have all the details of the traveller, select if a UniSA Cost Centre is being used for the trip.
   a. If yes, select the 'Yes' radial button.
   b. If no, select the 'No' radial button.
     i. If you do not wish the Travel Team to arrange your travel, select the 'No' radial button and upload your itinerary.
 	
5. Click the 'Next' button.	
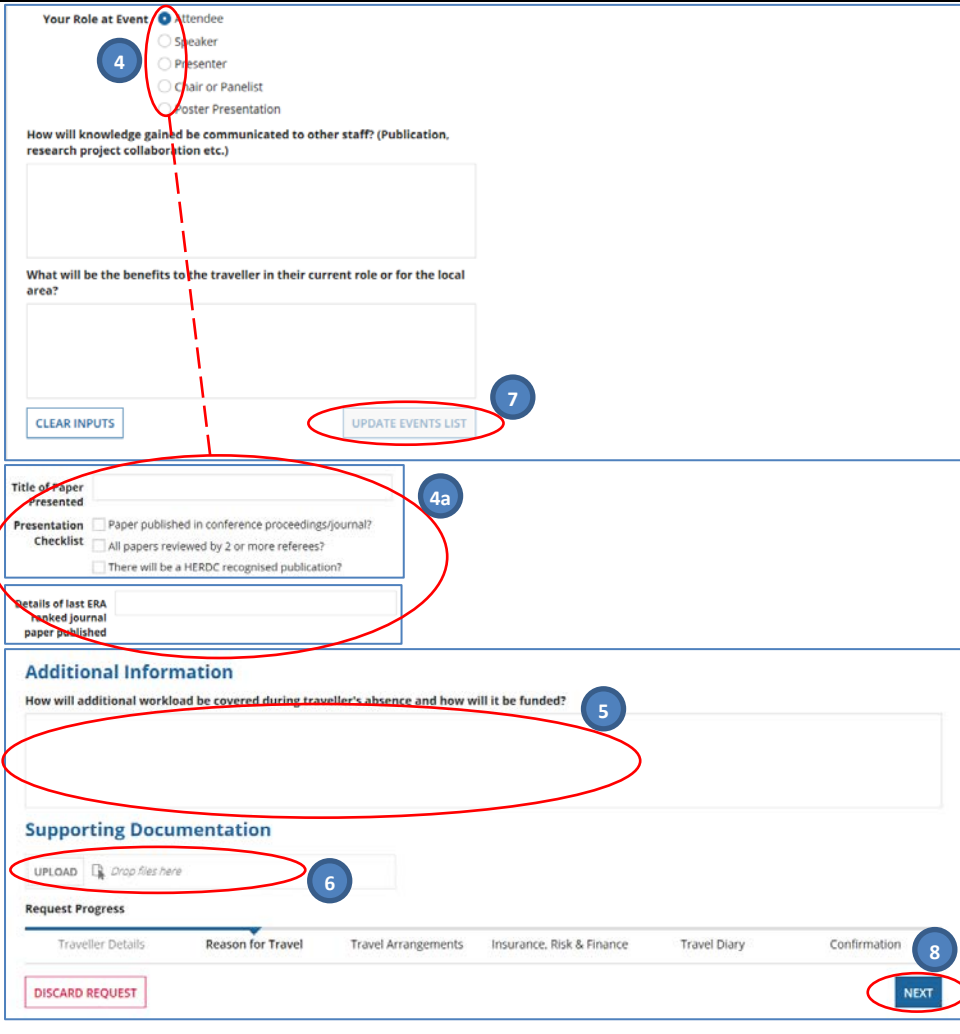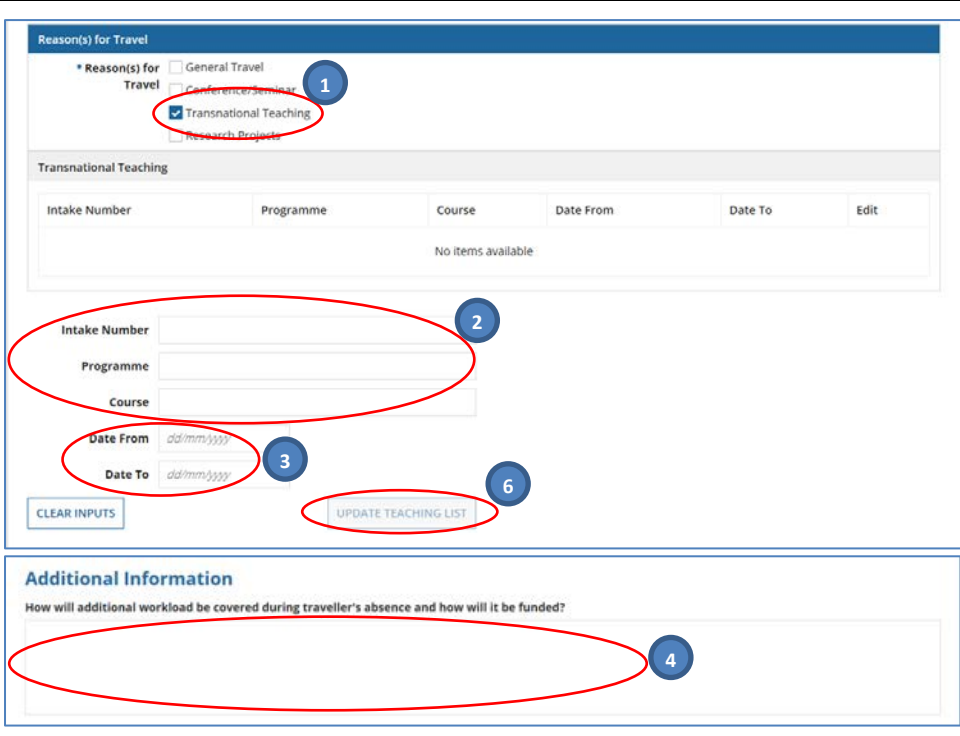
Quick Reference Guide
Business Travel Request (BTR) Form

Reason for Travel

Reason - General Travel	Select the category of the travel taking place (multiple reasons can be included by selecting the relevant tick boxes).
1. Select the 'General Travel' tick box. 2. Enter purpose, place and organisation visiting. 3. Enter dates of visit. 4. Enter any additional information relevant to the trip. 5. Attach supporting documentation. 6. Once details are entered the 'Update General Travel' button will become active. Click the button to save the request. 7. Click the 'Next' button.	
Reason - Conference/Seminar	Select the category of the travel taking place (multiple reasons can be included by selecting the relevant tick boxes).
1. Select the 'Conference/Seminar' tick box. 2. Enter name, organiser and location of the event. 3. Enter dates of visit.	

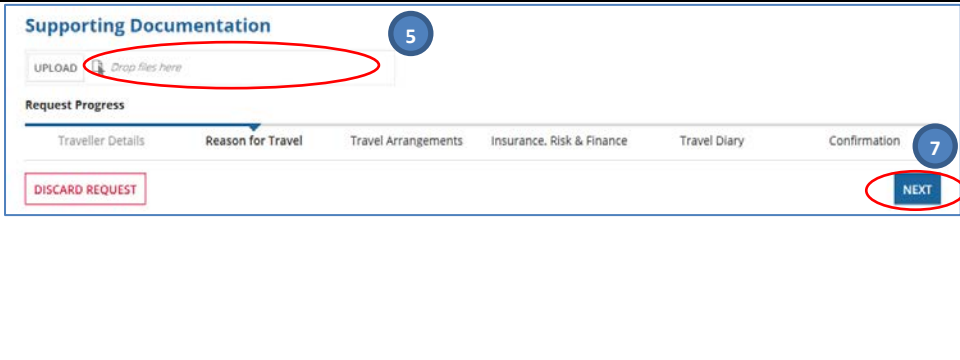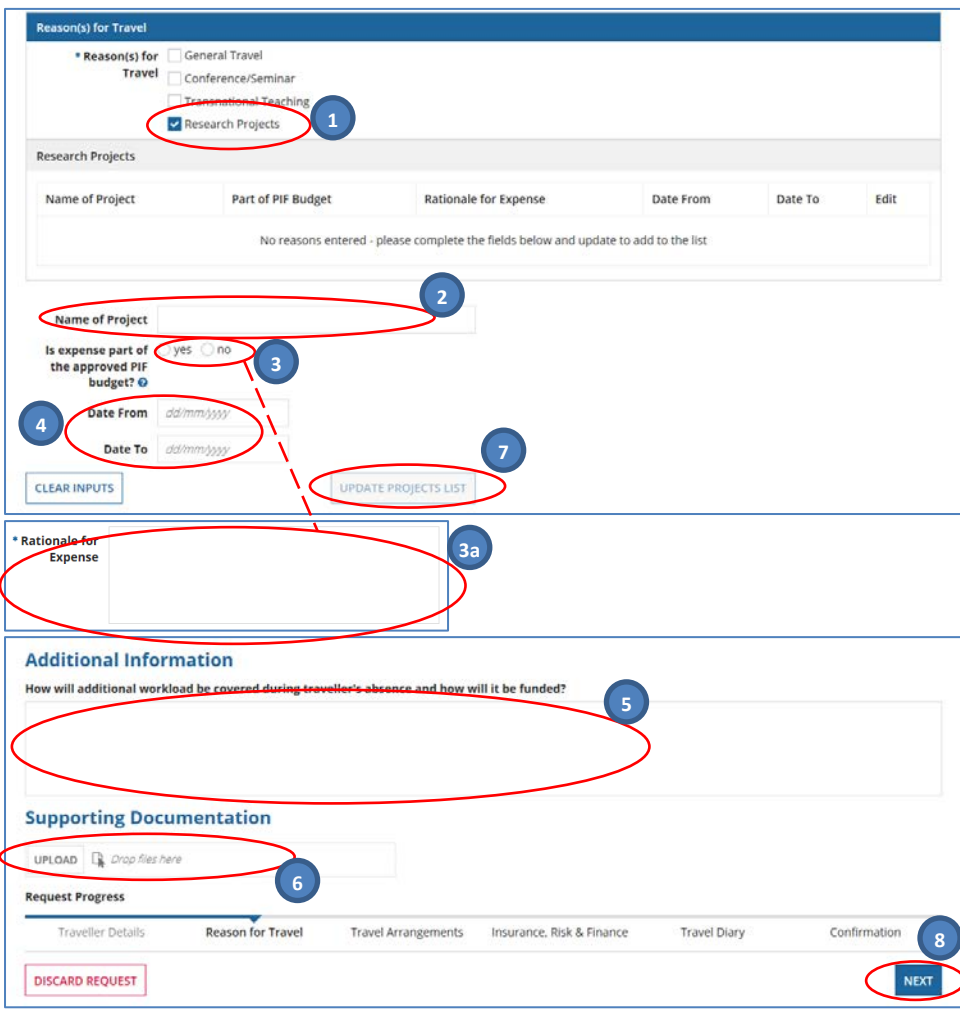|	
4. Select your role at the event and expected outcomes of attending. a. If you select the 'Presenter' or 'Poster Presentation' radial buttons, enter additional requested details.	**Your Role at Event** ○ Attendee ○ Speaker ○ Presenter ○ Chair or Panelist ○ Poster Presentation **How will knowledge gained be communicated to other staff? (Publication, research project collaboration etc.)** **What will be the benefits to the traveller in their current role or for the local area?** CLEAR INPUTS UPDATE EVENTS LIST
5. Enter any additional information relevant to the trip. 6. Attach supporting documentation. 7. Once details are entered the 'Update Events List' button will become active. Click the button to save the request. 8. Click the 'Next' button.	**Title of Paper Presented** **Presentation Checklist** ☐ Paper published in conference proceedings/journal? ☐ All papers reviewed by 2 or more referees? ☐ There will be a HERDC recognised publication? **Details of last ERA ranked journal paper published** **Additional Information** How will additional workload be covered during traveller's absence and how will it be funded? **Supporting Documentation** UPLOAD Drop files here **Request Progress** Traveller Details — Reason for Travel — Travel Arrangements — Insurance, Risk & Finance — Travel Diary — Confirmation DISCARD REQUEST NEXT
Reason - Transnational Teaching	Select the category of the travel taking place (multiple reasons can be included by selecting the relevant tick boxes).
1. Select the 'Transnational Teaching' tick box. 2. Enter intake number, programme and course of the teaching. 3. Enter dates of visit.	**Reason(s) for Travel** * Reason(s) for Travel ☐ General Travel ☐ Conference/Seminar ☑ Transnational Teaching ☐ Research Projects **Transnational Teaching** | Intake Number	Programme	Course	Date From	Date To	Edit | No items available Intake Number Programme Course Date From _dd/mm/yyyy_ Date To _dd/mm/yyyy_ CLEAR INPUTS UPDATE TEACHING LIST
4. Enter any additional information relevant to the trip.	**Additional Information** How will additional workload be covered during traveller's absence and how will it be funded?

Quick Reference Guide
Business Travel Request (BTR) Form

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5. Attach supporting documentation. 6. Once details are entered the 'Update Teaching List' button will become active. Click the button to save the request. 7. Click the 'Next' button.	**Supporting Documentation** UPLOAD Drop files here Request Progress Traveller Details — Reason for Travel — Travel Arrangements — Insurance. Risk & Finance — Travel Diary — Confirmation DISCARD REQUEST NEXT
Reason - Research Projects	Select the category of the travel taking place (multiple reasons can be included by selecting the relevant tick box).
1. Select the 'Research Projects' tick box. 2. Enter the project name. 3. Select if the expense is part of the PIF budget: a. If no, select the 'No' radial button and enter the rationale for the expense outside of the approved budget. 4. Enter dates of visit. 5. Enter any additional information relevant to the trip. 6. Attach supporting documentation. 7. Once details are entered the 'Update Projects List' button will become active. Click the button to save the request. 8. Click the 'Next' button.	**Reason(s) for Travel** * Reason(s) for Travel: General Travel / Conference/Seminar / Transnational Teaching / ☑ Research Projects **Research Projects** Name of Project	Part of PIF Budget	Rationale for Expense	Date From	Date To	Edit No reasons entered - please complete the fields below and update to add to the list Name of Project Is expense part of the approved PIF budget? ○ yes ○ no Date From: dd/mm/yyyy Date To: dd/mm/yyyy CLEAR INPUTS UPDATE PROJECTS LIST * Rationale for Expense **Additional Information** How will additional workload be covered during traveller's absence and how will it be funded? **Supporting Documentation** UPLOAD Drop files here Request Progress Traveller Details — Reason for Travel — Travel Arrangements — Insurance. Risk & Finance — Travel Diary — Confirmation DISCARD REQUEST NEXT

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Business Travel Request (BTR) Form

Travel Arrangements

Travel Arrangements - Airfare	Select the travel arrangements required (multiple options can be included by selecting the relevant tick boxes of the 'Required Travel Arrangements' section).

1. Select the 'Airfares' tick box.

2. Trip preferences will default tot tick 'Direct Flight (lowest logical fare)'. Select other options if required.

3. Select applicable 'Domestic' or 'International' radial button.
   a. If 'Domestic' is selected, click in the tick box to confirm prior approval has been received to arrange this travel.

4. Select the type of flights required by selecting the relevant radial button and travel class.

5. Enter the departure and arrival locations.

6. Enter the departure date.

7. If applicable, enter the preferred departure time and airline.

8. Return journey
   a. If you have selected a 'One Way' flight then details of how you intend to return from your trip.
   b. If you have a 'Return' flight, enter the return leg details as applicable.

9. Confirm whether you require a flexible ticket or additional luggage.

10. Once details are entered the 'Update Flight List' button will become active. Click the button to save the request.

11. If you have selected a 'Multi-City' flight. Repeat steps 5-10.	
12. If you have not selected accommodation to be arranged in the Travel Arrangements section, then you will need to provide details of your arrangements.	
13. Enter any additional information relevant to the trip.	
14. Click the 'Next' button.	

Travel Arrangements - Accommodation	Select the travel arrangements required (multiple options can be included by selecting the relevant tick boxes of the 'Required Travel Arrangements' section).
1. Select the 'Accommodation' tick box.	
2. Select applicable 'Domestic' or 'International' radial button. a. If 'Domestic' is selected, click in the tick box to confirm prior approval has been received to arrange this travel.	
3. Enter the city and location for the required accommodation.	
4. Enter the check-in and check-out dates.	
5. If applicable, enter any additional information.	
6. Once details are entered the 'Update Accommodation List' button will become active. Click the button to save the request.	
7. Select the applicable radial button for the accommodation payment method.	
8. If you require multiple accommodations. Repeat steps 3-6.	

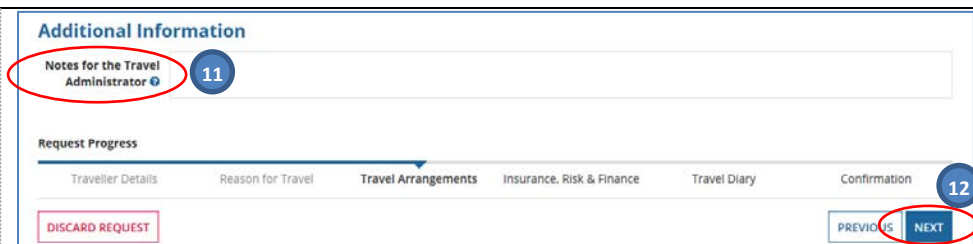|		
9. Enter any additional information relevant to the trip. 10. Click the 'Next' button.	**Additional Information** Notes for the Travel Administrator ⑨ Request Progress Traveller Details — Reason for Travel — **Travel Arrangements** — Insurance, Risk & Finance — Travel Diary — Confirmation ⑩ DISCARD REQUEST PREVIOUS **NEXT**	
Travel Arrangements – Ground Transportation	Select the travel arrangements required (multiple options can be included by selecting the relevant tick boxes of the 'Required Travel Arrangements' section).	
1. Select the 'Ground Transportation' tick box. 2. Select applicable 'Domestic' or 'International' radial button. a. If 'Domestic' is selected, click in the tick box to confirm prior approval has been received to arrange this travel. 3. If you have not selected accommodation to be arranged in the Travel Arrangements section, then you will need to provide details of your arrangements. 4. Select the type of ground transport required by selecting the relevant radial button and travel class. 5. Select the mode of transport required by selecting the relevant radial button 6. Enter the pick-up/station, date and preferred time. a. If a return mode of transport is required enter the return journey details. 7. Once details are entered the 'Update Ground Transportation List' button will become active. Click the button to save the request. 8. If you require multiple journeys. Repeat steps 4-7.	> Reason for Travel Summary v Trip Information * Required Travel Arrangements ☐ Airfares ☐ Accommodation ① ☑ Ground Transportation ☐ Car Rental * Please select all arrangements to be made for the traveller * Type of Travel ⊙ Domestic ◯ International ② Approval ☐ ② received formal approval to proceed with this travel request ②a ℹ Click here for help completing this section of the form **Accommodation Arrangements** City	Accommodation Name or Location	Check In	Check Out	Additional Requests	Edit No arrangements entered - please complete the fields below and update to add to the list ⚠ You have indicated that accommodation is not required to be arranged by the travel team, can you please add an arrangement to provide information regarding your accommodation ③ NOTIFY US OF YOUR ACCOMMODATION **Ground Transport Arrangements (To Be Arranged By The Travel Team)** Type of Transport	Pick Up Location	Date for Pick Up	Preferred Time	Specific Driver	Drop Off Location	Edit No arrangements entered - please complete the fields below and update to add to the list Type of Transport ⊙ Home/Campus/Airport Transfer ◯ Other Transfer ④ ◯ Train ◯ Ferry Mode of Transfer ⊙ Return ◯ One Way ⑤ Pick Up Location Home Pick Up Date 21/06/2018 ⑥ Preferred Time Drop Off Location Airport Return Date dd/mm/yyyy ⑥a Preferred Time Specific Driver (if required) CLEAR INPUTS UPDATE GROUND TRANSPORT LIST ⑦	

9. Enter any additional information relevant to the trip. 10. Click the 'Next' button.	**Payment Information** No payment information is required **Additional Information** Notes for the Travel Administrator (9) Request Progress Traveller Details — Reason for Travel — **Travel Arrangements** — Insurance, Risk & Finance — Travel Diary — Confirmation (10) DISCARD REQUEST PREVIOUS NEXT

Travel Arrangements - Travel Diary	Select the travel arrangements required (multiple options can be included by selecting the relevant tick boxes of the 'Required Travel Arrangements' section).
1. Select the 'Car Rental' tick box. 2. Select applicable 'Domestic' or 'International' radial button. a. If 'Domestic' is selected, click in the tick box to confirm prior approval has been received to arrange this travel. 3. If you have not selected accommodation to be arranged in the Travel Arrangements section, then you will need to provide details of your arrangements 4. The vehicle type with default the selection to a Standard Sedan. Enter other options if required. 5. Enter the pick-up location and date. 6. Enter the return location and date. 7. If applicable, enter any additional requests. 8. Once details are entered the 'Update Car Rental List' button will become active. Click the button to save the request. 9. Select the applicable radial button for the accommodation payment method.	**> Reason for Travel Summary** **v Trip Information** * Required Travel Arrangements: ☐ Airfares ☐ Accommodation ☐ Ground Transportation ☑ Car Rental (1) * Please select all arrangements to be made for the traveller * Type of Travel: ● Domestic ○ International (2) Approval: ☐ I have received formal approval to proceed with this travel request (2a) ⓘ Click here for help completing this section of the form **Accommodation Arrangements** | City	Accommodation Name or Location	Check In	Check Out	Additional Requests	Edit | No arrangements entered - please complete the fields below and update to add to the list ⚠ You have indicated that accommodation is not required to be arranged by the travel team, can you please add an arrangement to provide information regarding your accommodation (3) NOTIFY US OF YOUR ACCOMMODATION **Car Rental Arrangements** | Type of Vehicle	Pick Up Location	Pick Up Date	Return Location	Return Date	Additional Requests	Edit | No arrangements entered - please complete the fields below and update to add to the list Type of Vehicle: Standard Sedan (4) Pick Up Location: Airport (5) * Pick Up Date: 21/06/2018 * Return Location: Same as Pickup (6) * Return Date: 28/06/2018 Additional Requests (7) CLEAR INPUTS UPDATE CAR RENTAL LIST (8) **Payment Information** * As the traveller does not have a UniSA credit card how will payment be arranged? ○ Pay personally and seek reimbursement upon return ○ Arrange a chargeback for the accommodation (additional fees apply) ● Applying for a UniSA credit card prior to travel (9) How to apply for a UniSA Credit card

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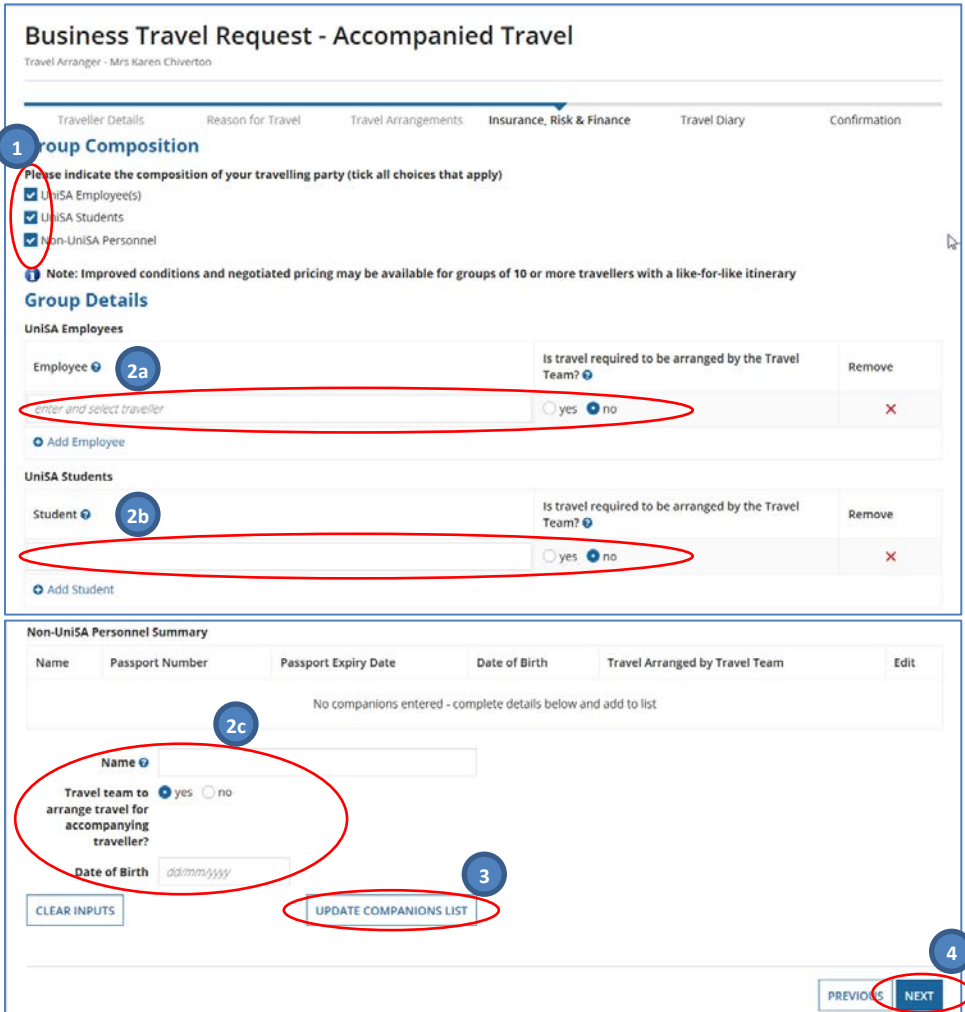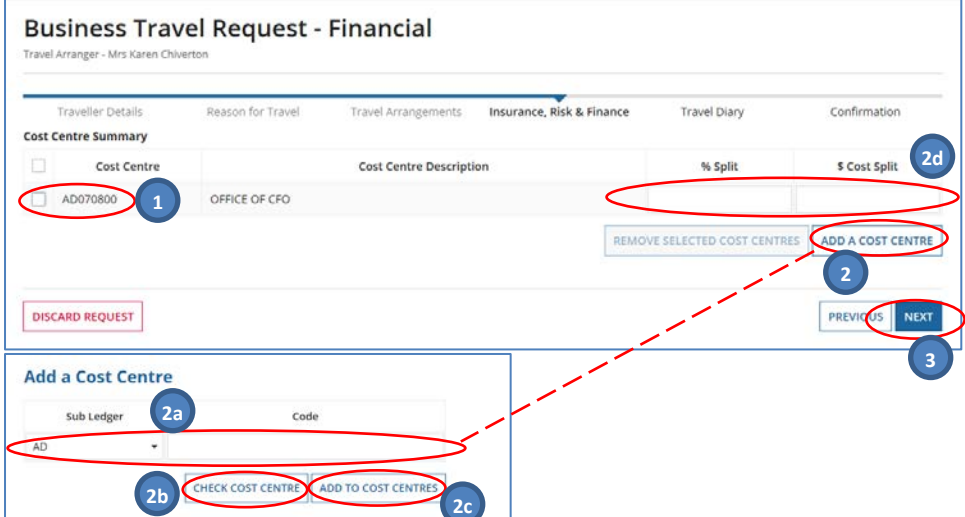|	
10. If you require multiple journeys. Repeat steps 4-8. 11. Enter any additional information relevant to the trip. 12. Click the 'Next' button.	**Additional Information** Notes for the Travel Administrator ⓘ **11** **Request Progress** Traveller Details	Reason for Travel	Travel Arrangements	Insurance, Risk & Finance	Travel Diary	Confirmation **12** DISCARD REQUEST	PREVIOUS	NEXT

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Business Travel Request (BTR) Form

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Insurance, Risk & Finance

Insurance Conditions	Review the insurance conditions and identify any factors that need to be highlighted to the insurance team.
1. Select the tick box relevant to any area that your trip that could affect the insurance element of your trip. 2. If you have indicated the trip includes more than 40% Personnel Travel, then enter the approxiamte number of days. 3. Ensure you read all the notifications relevant to trip. 4. Click the 'Next' button.	

Risk Management (Overseas Travel)	Review and identify any risk factors that need to be highlighted to the insurance team in relation to Overseas Travel.

1. Confirm whether an offshore risk assessment has been completed.
  a. If no, complete a risk assessment.
  b. If yes, select the 'Yes' radial button and complete questions related to managing risks.
 	
 2. Confirm whether any research is subject to defence export controls.
  a. If no, select the 'No' radial button.
  b. If yes, select the 'Yes' radial button and confirm whether a permit is required.
 	
 3. Select whether the visitor will be visiting (including passing through) any locations with a threat assessment level of 3 or 4.
 	
 4. Click the 'Next' button	

Quick Reference Guide
Business Travel Request (BTR) Form

Group Travel Elements (if Applicable)	Identify any persons accompanying the traveller as indicated in the insurance conditions section.

1. Select the tick boxes related to those accompanying the traveller.
 	
2. Additional traveller details:
  a. If a UniSA Staff member, enter the names and select from the generated list and select the radial button for whether the Travel Team is to organise their travel.
  b. If a UniSA Student, enter the names and select from the generated list and select the radial button for whether the Travel Team is to organise their travel
  c. If Non-UniSA personnel, enter the name, select the radial button for whether the Travel Team is to organise their travel and enter their date-of-birth.
 	
3. Once details are entered the 'Update Companions List' button will become active. Click the button to save the request.
 	
4. Click the 'Next' button.	

Financial	Select the appropriate areas of funding the travel.

1. The traveller's default cost centre will appear in the cost centre list.
 	
2. If another/additional cost centres need to be added, click on the 'Add a Cost Centre' button.
  a. Enter the cost centre details.
  b. Click on the 'Check Cost Centre' button to ensure it is active.
  c. Click on the 'Add to Cost Centres' button to add to the travel request.	

d. Enter how the costs will be split between the cost centres. 3. Click the 'Next' button.	

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Travel Diary	
Daily Activity Record (if applicable)	Enter details of the traveller's activities during the trip where the traveller is away from home for 6 nights or more.
1. Click here for further information. 2. Enter place of activity for each day. 3. Enter start and finish times for activity for each day. 4. Enter activity description for each day. 5. State whether activity id for 'Personal' or 'Business' reasons. 6. Once complete click the 'Save Travel Diary button. 7. Click the 'Next' button.	

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Confirmation

Lodge the BTR	Submit the BTR to the Travel Team to action.

1. If the BTR cannot be approved based on the information provided in the insurance section. You will be informed by a message on the screen.
   a. Make a note of your reference number.
   b. Click the 'Finish' button.

2. If the BTR can be approved based on the information provided in the insurance section. You will be informed by a message on the screen detailing what will be required if circumstances of the traveller changes.
   a. Make a note of your reference number.
   b. Click the 'Finish' button.

Business Travel Request: RESKChiv02012035 - Confirmation
Travel Arranger - Mrs Karen Chiverton

Traveller Details   Reason for Travel   Travel Arrangements   Insurance, Risk & Finance   Travel Diary   Confirmation

You are about to submit request RESKChiv02012035 for approval

Thank you for your enquiry with the UniSA Travel Team

- Based on your answers to the Insurance, Risk & Finance questions, please note that your travel request cannot be approved until you establish contact with the UniSA Insurance Team on (08) 8302 1678 to discuss your booking request further
- Your unique reference number is : RESKChiv02012035, please quote this number when referring to this particular request.

If you have any further questions, please do not hesitate contacting the UniSA Travel Team on (08) 8302 6430

PREVIOUS   FINISH

Business Travel Request: RESKChiv22062018 - Confirmation
Travel Arranger - Mrs Karen Chiverton

Traveller Details   Reason for Travel   Travel Arrangements   Insurance, Risk & Finance   Travel Diary   Confirmation

You are about to submit request RESKChiv22062018 for approval

Thank you for your enquiry with the UniSA Travel Team

- Based on the information you have provided, we confirm that you will be covered by the University's travel insurance for the full duration of your travel.

You will need to contact the UniSA Insurance Office to make additional arrangements if your intended trip is altered and:

- your trip exceeds 180 days;
- you add more than 50% in personal travel, and/or;
- you have an existing medical condition which could possibly require treatment or medication while travelling.

A summary of the University's travel insurance policy can be found on the web at Staff - Travel Insurance flyer which we recommend you print and take a copy with you. FAQs on travel are found at: FAQs on Travel Insurance.

Please note that the University's travel insurance is a corporate policy and therefore generally offers broader coverage, however the excess is also higher. It is a $250 excess for general claims and $500 for electronic equipment which you would be responsible for in the event of you making a claim. Electronic equipment (eg. mobile phones, laptops, iPads, cameras etc) must be carried with you as part of your hand luggage in order to be covered under the policy, unless the airline requires devices to be checked in, in which case it will need to be adequately packed and protected from theft or damage.

- Your unique reference number is : RESKChiv22062018, please quote this number when referring to this particular request.

If you have any further questions, please do not hesitate contacting the UniSA Travel Team on (08) 8302 6430

PREVIOUS   FINISH