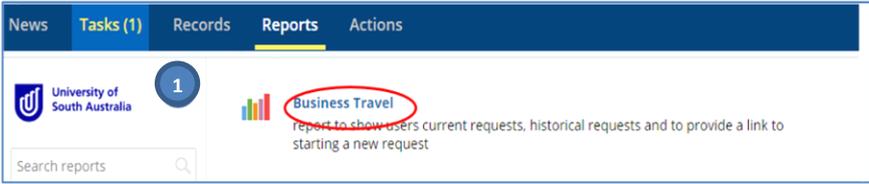
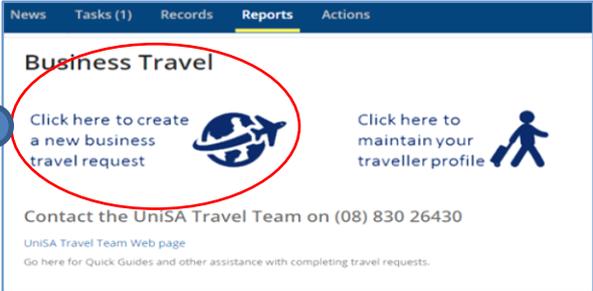


Quick Reference Guide - Business Travel Request (BTR) Form

Purpose: This guide provides an overview on how staff (and/or their nominated Travel Coordinators) and University students complete a Business Travel Request (BTR) form for the purpose of booking travel with the University's [Travel Team](#), or for notifying travel booked by a third party in compliance with the exception set-out in sections 4.5 and 4.6 of the [Travel Guidelines](#).

References: Refer to the [Travel Guidelines](#) on the Finance Unit's website.

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Launch the Form in Appian	
<p>Launching the Form</p> <p><i>Please note: Save this link in your favourites</i></p>	<p>To access the BTR Form, click on the following link: Business Travel Portal.</p> <p>If prompted, use your UniSA username and password to access the Appian site.</p>
<p>1. Click on the <i>Business Travel</i> link.</p>	
<p>2. Click on the link: <i>Click here to create a new business travel request</i>.</p>	

Traveller Details

Person Travelling: Self

- Select the 'Self' radio button.
- 'Travel Approved in principle by; ensure the name is correct.
Note: The 'Travel Approved in Principle by' is automatically pulled from the travellers profile and can be amended permanently within the traveller profile form. If necessary, click on x to remove and type the correct name. For students - ensure that you add the name of your supervisor.
- Select 'yes' if a UniSA Cost Centre is being used to pay the trip.
Note: If any portion of your trip will be paid for by UniSA through a UniSA Cost Centre please select 'Yes'. If your trip will be paid for by yourself (including if you will be receiving a grant or scholarship from the University) please select 'No'.
- Select 'Yes' to arrange travel quotes through the Travel Team or 'No' if travel will be arranged independently.
Note: Staff members or students who are travelling for University-related activities and have been permitted to arrange travel independently from the Travel Team - which must be in accordance with the Travel Guidelines i.e. exchange students. All travellers are required to lodge all their itineraries within the BTR especially when performing side trips pre post travel.
- Indicate if you intend on travelling to undertake the activity?
Note: if you are intending on conducting a University Activity whilst you are in a home location (outside of Adelaide) you must answer 'no'.
- Indicated if you intend travelling internationally to conduct the proposed activity?
- If yes, you are required to enter your complete and entire itinerary into the table provided:
 - Enter all flights, train, bus, self-drive and other bookings.
 - Enter your from and To City
 - Enter your departure Dates
 - Enter the Airlines booking reservation number as indicated on your booked itinerary (6 digits long)
 - Click on add a new location to include ALL information from your itinerary.
- You are required to upload a copy of your itinerary for tracking purposes.
Note: Multiple itineraries can be uploaded using this functionality.
- Click the 'Next' button.

Completing a BTR for yourself

Business Travel Request

Indicate whether travel request is for yourself or on behalf of another person

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

1 Primary Traveller: Ms Jo Arney
 Person Travelling: Self Other - UniSA employee Other - UniSA student Other - Non-UniSA personnel
 2 Travel approved in principle by: Mr Hai Quan, Manager: Procurement FIN X

Note: Group travel can be arranged by indicating you are travelling with colleagues in the 'Insurance, Risk and Finance' section later in this process

Is any part of this trip being funded from a UniSA cost centre? ?*

Yes No 3

Do you want the Travel Team to arrange Travel quotes? ?*

Yes No 4

Have you or do you intend on travelling to undertake any University activity?*

Yes No 5

Have you or do you intend on travelling Internationally i.e. not in Australia?*

Yes No 6

Method of Travel	From City	To City	Departure Date	Booking Reservation Number
Flight	Adelaide, Australia (ADL) X	London - Heathrow Airport, United Kingdom	25/12/2022	RX89YC
Flight	London - Heathrow Airport, United Kingdom	Adelaide, Australia (ADL) X	01/12/2022	P832Q1
7v Add a new Location				

Upload itinerary file if available ?

8

DISCARD REQUEST

9

Quick Reference Guide - Business Travel Request (BTR) Form

Person Travelling: Other - UniSA Employee/Student	Completing a BTR on behalf of another UniSA staff member or UniSA student
<ol style="list-style-type: none"> Select the 'Other - UniSA employee' or 'Other - UniSA student' button. Enter the traveller's name. 'Travel Approved in principle by; ensure the name is correct. <p>Note: The 'Travel Approved in Principle by' is automatically pulled from the traveller's profile and can be amended permanently within the traveller profile form. If necessary, click on x to remove and type the correct name. For students - ensure that you add the name of your supervisor.</p> <p>NEXT: Follow the instructions from item 3 in the 'Person Travelling: Self' section.</p>	
Person Travelling: Other - Non-UniSA personnel	Completing a BTR on behalf of non-UniSA personnel
<ol style="list-style-type: none"> Select the 'Other - Non-UniSA personnel' button. Select if you require the traveller to provide details in order to complete the form: <ol style="list-style-type: none"> If yes, select the 'Yes' button:. Enter the traveller's details including the e-mail address. If no, select the 'no' button. Enter the traveller's details including the Date of Birth. Select 'Travel Approved in Principle by' ensure the name is correct. <p>Note: This will stop the process. The traveller will receive an e-mail requesting that they complete travel information and declaration form and return it to the initiator of the form. The form should then re-commence select and the initiator with continue and select 'no' at this point.</p> <p>Note: The 'Travel Approved in Principle by' is automatically pulled from the traveller's profile and can be amended permanently within the traveller profile form. If necessary, click on x to remove and type the correct name. For students - ensure that you add the name of your supervisor.</p> <p>NEXT: Follow the instructions from item 3 in the 'Person Travelling: Self' section.</p>	

Reason for Travel

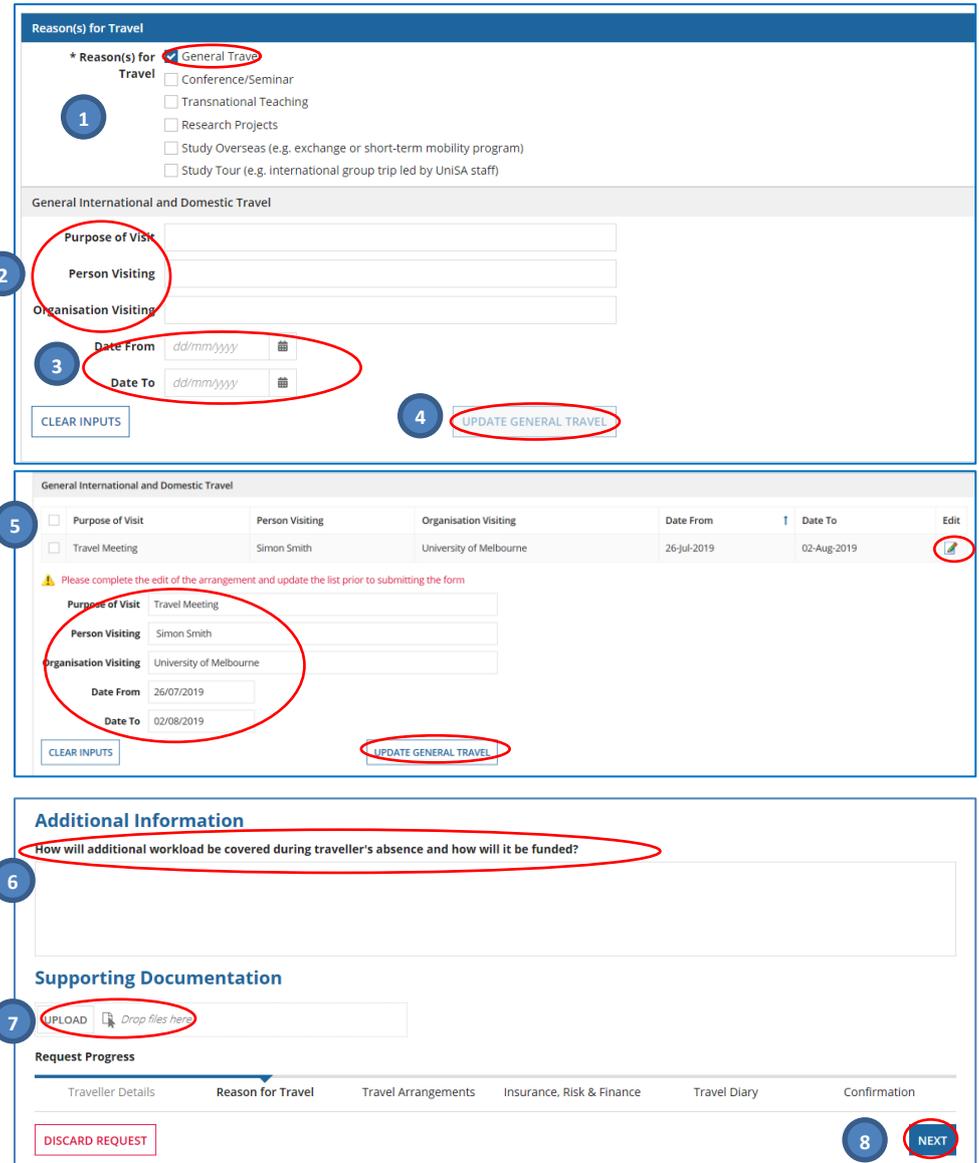
Reason - General Travel

Select the categories 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, person and organisation visiting.
3. Enter dates of visit.
4. Once details are entered click 'Update General Travel' to save the details and repeat as necessary, otherwise continue.

*Note: The * identifies all mandatory fields.*

5. If you wish to amend your entry, click on  make your required amendments and click 'Update General travel'.
6. If applicable, advise how your work will be covered during this proposed travel.
7. If applicable, attach any supporting documentation to support the approval process.
8. Click on the 'Next' button.



Reason(s) for Travel

* Reason(s) for Travel General Travel

Travel Conference/Seminar
 Transnational Teaching
 Research Projects
 Study Overseas (e.g. exchange or short-term mobility program)
 Study Tour (e.g. international group trip led by UniSA staff)

General International and Domestic Travel

Purpose of Visit

Person Visiting

Organisation Visiting

Date From 

Date To 

General International and Domestic Travel

<input type="checkbox"/> Purpose of Visit	Person Visiting	Organisation Visiting	Date From	Date To	Edit
<input type="checkbox"/> Travel Meeting	Simon Smith	University of Melbourne	26-Jul-2019	02-Aug-2019	

Please complete the edit of the arrangement and update the list prior to submitting the form

Purpose of Visit Travel Meeting

Person Visiting Simon Smith

Organisation Visiting University of Melbourne

Date From 25/07/2019

Date To 02/08/2019

Additional Information

How will additional workload be covered during traveller's absence and how will it be funded?

Supporting Documentation

 Drop files here

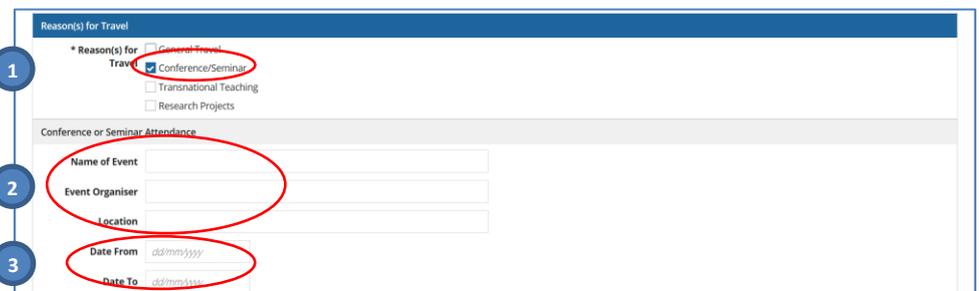
Request Progress

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

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 conference/seminar.



Reason(s) for Travel

* Reason(s) for Travel General Travel
 Conference/Seminar
 Transnational Teaching
 Research Projects

Conference or Seminar Attendance

Name of Event

Event Organiser

Location

Date From 

Date To 

Quick Reference Guide - Business Travel Request (BTR) Form

4. Select your role at the event and expected outcomes of attending:
 - i. If you select the 'Presenter' or 'Poster Presentation' buttons, enter additional requested details.
 5. click 'Update General Travel' to save the details and repeat as necessary, otherwise continue.
- NEXT:** Follow the instructions from item 6 in the 'Reason - General Travel' section.

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 details.
 3. Enter dates of visit.
 4. Once details are entered, click 'Update teaching list' to save the details and repeat as necessary.
- NEXT:** Follow the instructions from item 6 in the 'Reason - General Travel' section.

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. Confirm if the expense is part of an approved Project Budget:
 - i. If no, select the 'No' radio button and enter the rationale for the expense requested outside of the approved budget.
 4. Enter dates of visit.
 5. Once details are entered click 'Update Projects List' to save the request and repeat as necessary.
- NEXT:** Follow the instructions from item 6 in the 'Reason - General Travel' section.

Quick Reference Guide - Business Travel Request (BTR) Form

<p>Reason - Study Overseas (e.g. exchange or short-term mobility program)</p>	<p>Select the category of the travel taking place (multiple reasons can be included by selecting the relevant tick boxes).</p>
<ol style="list-style-type: none"> 1. Select the 'Study Overseas (e.g. exchange or short-term mobility program) tick box. 2. Enter your study experience type. 3. Enter the name of your Host Institution/Organisation. 4. Enter the dates of your visit. 5. Enter the dates of your travel dates <p><i>Note: If you do not have a start or end date, please place approximate dates.</i></p> <ol style="list-style-type: none"> 6. Once details are entered click 'Update Study Overseas list' to save the details and repeat as necessary. <p>NEXT: Follow the instructions from item 6 in the 'Reason - General Travel' section.</p>	
<p>Reason – Study Tour</p>	<p>Select the category of the travel taking place (multiple reasons can be included by selecting the relevant tick boxes).</p>
<ol style="list-style-type: none"> 1. Select the 'Study Tour' tick box. 2. Enter the name of your Study Tour 3. Enter departure and return dates. 4. Once details are entered, click 'Update Study Tour list' to save the details and repeat as necessary. <p>NEXT: Follow the instructions from item 6 in the 'Reason - General Travel' section.</p>	

Travel Arrangements

Travel Arrangements - Airfare

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

1. Select applicable 'Australia' or 'International' button.
2. Select the 'Airfares' tick box.
3. Trip preferences will default to 'Direct Flight (lowest logical fare)'. Select other options as required.
4. Click on 'Add a new airfare arrangement' to progress.
5. Select the type of flights required by selecting the relevant button and travel class.
6. Enter the departure and arrival locations.

Note: The from airport is pre-loaded from the traveller's profile. However, this can be overwritten within the BTR and updated permanently within your profile at any time.

7. Enter the departure date.

Notes: This will be pre-populated based on your 'Reason for Travel'. You can override these dates at any time.

The *identifies all mandatory fields

8. If applicable, enter the preferred departure time and flight numbers.

9. Enter the return date
 - i. If you have selected a 'One Way' flight, then provide details of how you intend to return from your trip.

Note: This will be pre-populated based on your flights (if applicable). You can override these dates at any time.

10. If applicable, enter the preferred return time and flight numbers.

11. Confirm whether you require a flexible ticket or checked ('hold') luggage – domestic only.

12. Once details are entered click 'Update Flight List' to save the request and repeat for each flight, as necessary.

13. If you have selected a 'Multi-City' flight. Repeat steps 4-12 for each sector.

If you have not selected accommodation to be arranged in the Travel Arrangements section, you will need to provide details of your arrangements so that you can be located and contacted.

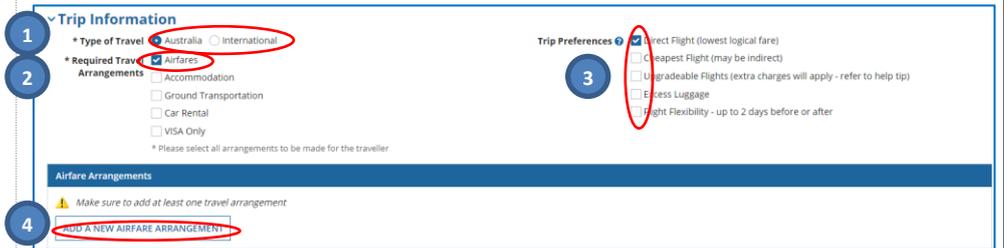
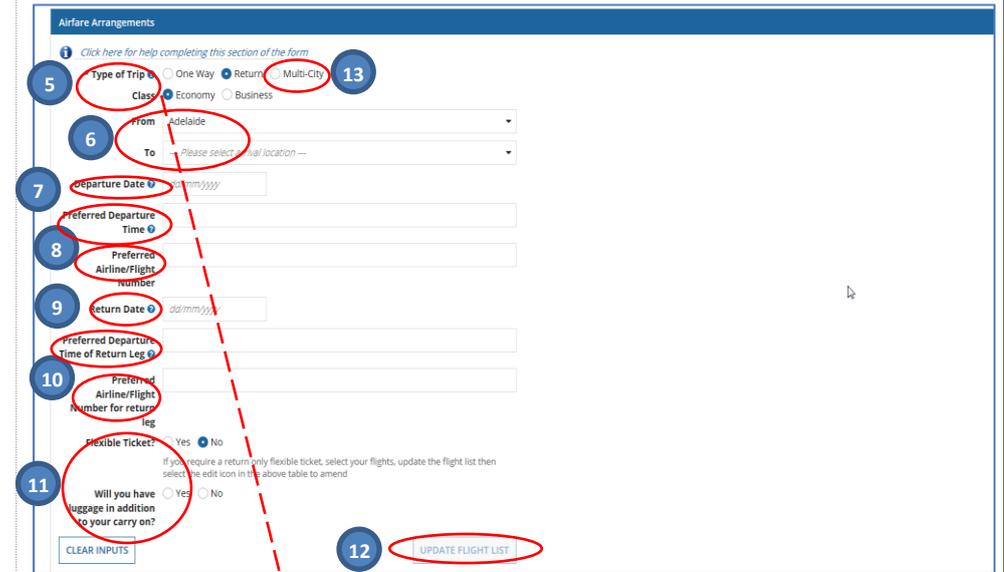
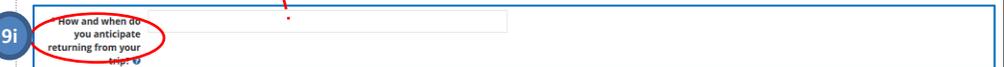
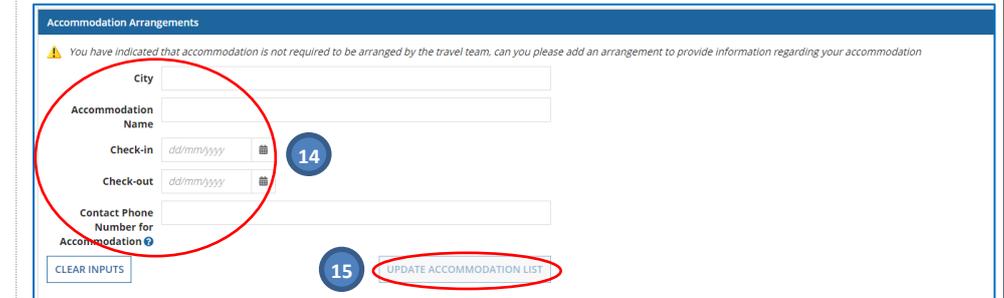
14. Enter the requested accommodation information

15. Once details are entered click 'Update Accommodation List' to save the information.

16. If applicable, advise any additional information to the Travel Team in the notes section.

17. Click the 'Next' button.

Note: The request can be cancelled by hitting the 'discard request button' or the 'previous button' will take you to the previously submitted page.

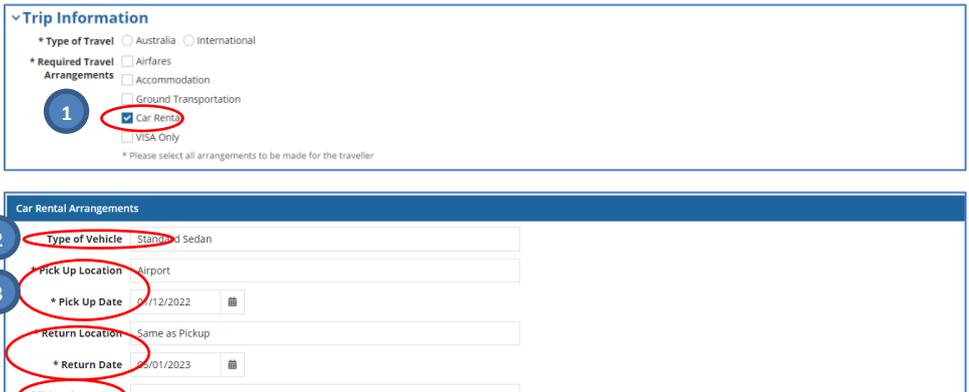







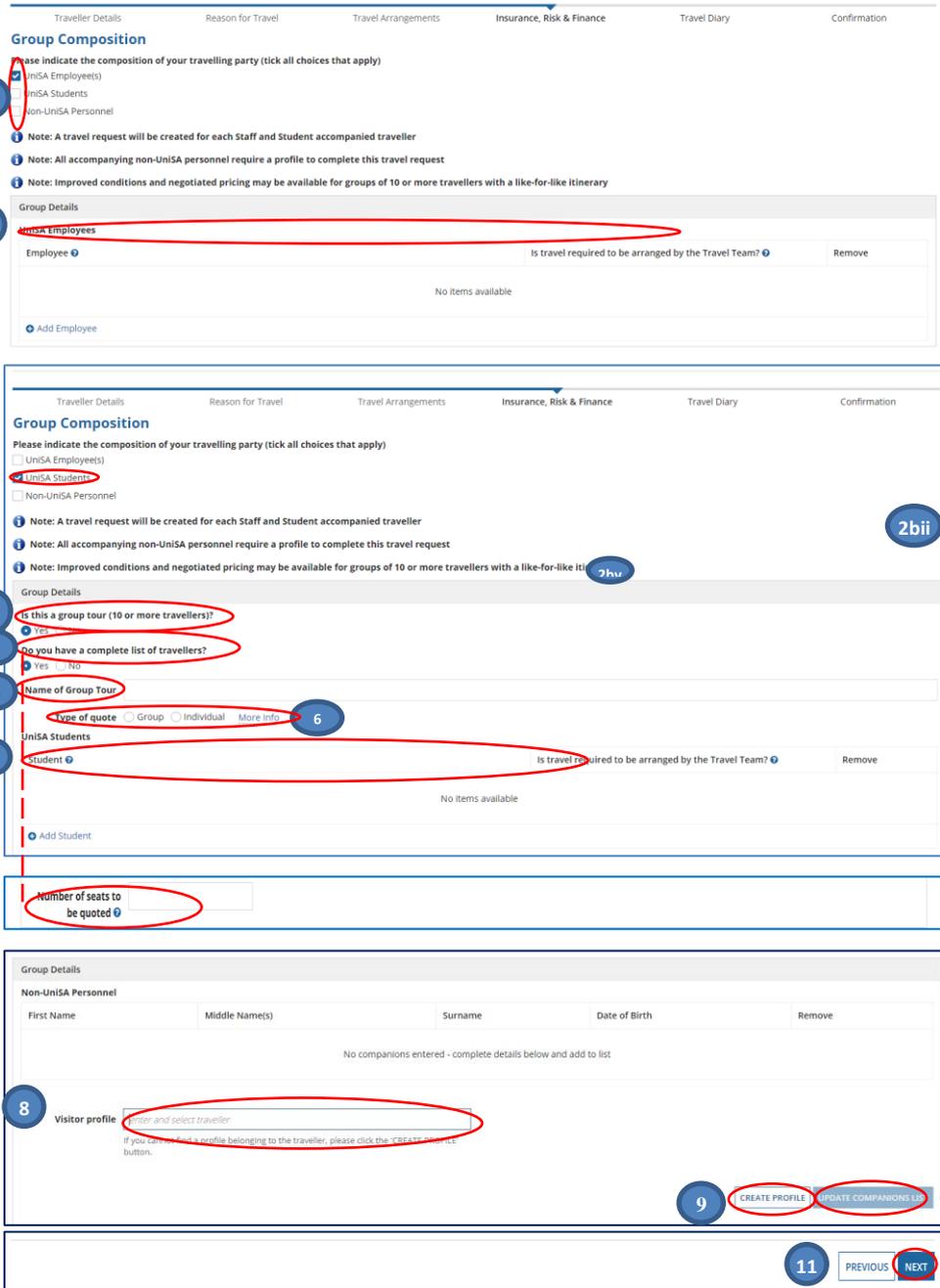
Quick Reference Guide - Business Travel Request (BTR) Form

Travel Arrangements - Accommodation	Select the travel arrangements required (multiple options can be included by selecting the relevant tick boxes in the 'Required Travel Arrangements' section).
<ol style="list-style-type: none"> Select the 'Accommodation' tick box. Enter the city and location for the required accommodation. Enter the check-in and check-out dates. <p><i>Notes: This will be pre-populated based on your 'Flight Dates (if applicable). You can override these dates at any time.</i></p> <ol style="list-style-type: none"> If applicable, enter any additional information. Once details are entered click 'Update Accommodation List' to save the request and repeat as necessary. If the traveller does not hold a University Credit Card, select the applicable button for the accommodation payment method. If the travellers holds a University credit card, instructions will appear automatically advising the traveller to use this card for payment and incidentals. <p>NEXT: Follow the instructions from item 16-17 in the 'Travel Arrangements – Flights' section.</p>	
Travel Arrangements - Ground Transportation	Select the travel arrangements required (multiple options can be included by selecting the relevant tick boxes in the 'Required Travel Arrangements' section).
<ol style="list-style-type: none"> Select the 'Ground Transportation' tick box. Select the type of ground transport required by selecting the relevant button. Select the mode of transport required by selecting the relevant button. Enter the pick-up location, date and preferred time. If a return mode of transport is required enter the return journey details. Once details are entered click 'Update Ground Transportation List' to save the request and repeat as necessary. <p><i>Notes: If you require multiple journeys. Repeat steps 4-7.</i></p> <p>NEXT: Follow the instructions from item 16-17 in the 'Travel Arrangements – Flights' section.</p>	

Quick Reference Guide - Business Travel Request (BTR) Form

Travel Arrangements - Car Rental	Select the travel arrangements required (multiple options can be included by selecting the relevant tick boxes of the 'Required Travel Arrangements' section).
<ol style="list-style-type: none">1. Select the 'Car Rental' tick box.2. The vehicle type with default the selection to a Standard Sedan. Enter other options if required.3. Enter the pick-up location and date.4. Enter the return location and date.5. Enter any additional requirements or information that you would like to communicate to the Travel Team.6. Once the details are entered the 'Update Car Rental List' button will become active. Click the button to save the request and repeat as necessary.	
<p><i>Notes: If you require multiple journeys. Repeat steps 4-8.</i></p>	
<p>NEXT: Follow the instructions from item 16-17 in the 'Travel Arrangements – Flights' section.</p>	

Insurance, Risk & Finance	
Insurance Conditions	Review the insurance conditions and identify any factors that need to be highlighted to the Insurance Team.
<ol style="list-style-type: none"> Select the applicable tick box <i>Please note: You can click multiple tick boxes.</i> If you have indicated the trip includes more than 50% Personnel Travel, enter the approximate number of days. This information is required to ensure you have the appropriate insurance in place for your entire trip. <i>Please note: This question will only appear for Staff and PHD/HRD students.</i> Ensure you read all the notifications relevant to the trip. <i>Please note: Travel Diaries only refer to staff and not students.</i> Click the 'Next' button. 	<div style="border: 1px solid #ccc; padding: 10px;"> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> Business Travel Request - Insurance, Risk & Finance <small>Travel Arranger - Ms Jo Aimey</small> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> Traveller Details Reason for Travel Travel Arrangements Insurance, Risk & Finance Travel Diary Confirmation </div> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <div style="background-color: #003366; color: white; padding: 2px;">Insurance Conditions</div> <p style="font-size: 0.8em; margin-top: 5px;">Please indicate if any of the following apply to the traveller:</p> <div style="font-size: 0.7em;"> <input type="checkbox"/> You have a pre-existing medical condition that could impact on your fitness for travel <input type="checkbox"/> Your trip could include more than 50% Personal Travel <input type="checkbox"/> You are travelling with one or more companions (or as part of a group) <input checked="" type="checkbox"/> None of the above </div> <p style="font-size: 0.7em; margin-top: 5px;">Click here for help completing this section of the form. (Click again to hide)</p> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <p style="font-size: 0.8em; margin-top: 5px;">Notification</p> <p style="font-size: 0.7em; margin-top: 5px;">The University is legally obliged to ensure, as far as is reasonably practicable, the health and safety of anyone travelling on behalf of the University. If you fail to disclose or intentionally withhold health information relating to a proposed period of travel, you will likely place yourself and the University at significant financial and legal risk and may constitute serious and wilful misconduct. Information provided will not be used for any other purpose.</p> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <p style="font-size: 0.8em; margin-top: 5px;">Notes</p> <p style="font-size: 0.7em; margin-top: 5px;">Please note that you may invalidate your travel insurance if you fail to disclose a pre-existing medical condition that could impact your fitness for travel, or that you have received medical advice that would reasonably preclude you from taking this journey. As a consequence, you could become personally liable for any medical costs incurred during your travel.</p> <p style="font-size: 0.7em; margin-top: 5px;">Applicable to staff only: Unisa practice is to require staff to reimburse the University for any portion of any expense that would attract FBT if the University were to pay for it, therefore, staff will be required to contribute or reimburse Unisa for a portion of flight costs that are deemed to be personal in nature. If the staff member does not contribute or otherwise cover this personal portion, then the relevant cost centre will bear an additional cost on account of FBT.</p> <p style="font-size: 0.7em; margin-top: 5px;">Applicable to staff only: If you have a Unisa credit card it is expected that this is used for all incidentals associated with this travel.</p> </div> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 5px;"> DISCARD REQUEST <div style="text-align: right;"> 4 PREVIOUS NEXT </div> </div> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <p style="font-size: 0.8em; margin-top: 5px;">Approximate Number of Personal Days</p> <div style="border: 1px solid #ccc; padding: 2px; font-size: 0.8em; margin-top: 5px;">0</div> <p style="font-size: 0.7em; margin-top: 5px;">* Please note that your proposed Travel Diary is required to be finalised before your trip can be approved</p> </div>

Group Travel Elements	If you selected 'you are travelling with one or more companions (or a part of a group)' within the Insurance conditions page you will be required to identify the additional travellers
<ol style="list-style-type: none"> Select the tick boxes related to the composition of those accompanying the traveller. If a UniSA Employee, click on Add employee, enter the name and select from the generated list. If the Travel Team are to organise travel quotes, use the radio button to indicate this and press NEXT. If a UniSA Student, Identify if this travel is part of a Study Tour (including 10 or travellers) by clicking on the radio button. <ol style="list-style-type: none"> If no, click no. Click on 'Add Student'. Enter the name and select from the generated list. If the Travel Team are to organise travel quotes, use the radio button to indicate this. If 'yes', click yes. Answer the question 'Do you have a complete list of travellers' by using the radio button. <ol style="list-style-type: none"> if no - Identify the number of seats required to be quoted. Enter the name of the Group Tour. This reference will then be applied against all students submitted within a Group Tour. Identify if the required quote should be quoted individually or part of a group. Use the link to understand more about these different types of quotes. Enter the names and select from the generated list. If the Travel Team are to organise travel quotes, use the radio button to indicate this. Click the 'next' button. 	
<p>Notes: Additional travellers can be added by clicking on Add Employee/Student.</p> <p>To remove a selected name, click on the x.</p> <p>All travellers added within this Group booking functionality will receive an e-mail with instructions to access and finalise the BTR. Please advise these travellers not to complete a new BTR as this will create duplications. Group travellers are to accept the automatically generated BTR.</p> <ol style="list-style-type: none"> If Non-UniSA personnel enter the travellers name. If the travellers name does not appear, a profile is required to be completed. Once details are entered the 'Update Companions List' button will become active, click to save the details. Click the 'Next' button. 	

Quick Reference Guide - Business Travel Request (BTR) Form

Financial	Select the appropriate areas of funding the travel.																				
<p>1. The traveller's default cost centre will appear in the cost centre list. <i>Note: The default cost centre can be permanently amended within your travel profile.</i></p> <p>2. If an additional cost centre is required to be added, click on the 'Add a Cost Centre' button:</p> <ol style="list-style-type: none"> Adjust the sub ledger by using the dropdown box and add cost centre code. Click on the 'Check Cost Centre' button to ensure it is valid. Click on the 'Add to Cost Centres' button to add to the travel request. Enter how the costs will be split between the cost centres either a \$ OR % split. <p>3. To delete the home cost centre, use the check box to identify the cost centre to be removed and then click on the 'Remove Selected Cost Centre' button.</p> <p><i>Note: Ensure a default cost centre is removed if it will no be used for this particular transaction.</i></p> <p>4. Click the 'Next' button.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <h3 style="text-align: center;">Business Travel Request - Financial</h3> <p style="text-align: center; font-size: small;">Travel Arranger - Mrs Karen Chiverton</p> <hr/> <div style="display: flex; justify-content: space-between; font-size: x-small;"> Traveller Details Reason for Travel Travel Arrangements Insurance, Risk & Finance Travel Diary Confirmation </div> <table border="1" style="width: 100%; border-collapse: collapse; font-size: x-small;"> <thead> <tr> <th style="width: 5%;">Cost Centre</th> <th style="width: 65%;">Cost Centre Description</th> <th style="width: 15%;">% Split</th> <th style="width: 15%;">\$ Cost Split</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> AD070800</td> <td>OFFICE OF CFO</td> <td></td> <td></td> </tr> </tbody> </table> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> DISCARD REQUEST PREVIOUS NEXT </div> <div style="border: 1px solid #000; padding: 5px; margin-top: 10px; font-size: x-small;"> <h4 style="margin: 0;">Add a Cost Centre</h4> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Sub Ledger</td> <td style="width: 70%;">Code</td> </tr> <tr> <td>AD</td> <td></td> </tr> </table> <div style="display: flex; justify-content: space-around; margin-top: 5px;"> CHECK COST CENTRE ADD TO COST CENTRES </div> </div> <div style="border: 1px solid #000; padding: 5px; margin-top: 10px; font-size: x-small;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Cost Centre</td> <td>OFFICE OF CFO</td> </tr> <tr> <td>Cost Centre Manager</td> <td>Mr Peter Prest</td> </tr> <tr> <td>School/Unit</td> <td>FIN</td> </tr> <tr> <td>Division</td> <td>Resources</td> </tr> </table> </div> </div>	Cost Centre	Cost Centre Description	% Split	\$ Cost Split	<input type="checkbox"/> AD070800	OFFICE OF CFO			Sub Ledger	Code	AD		Cost Centre	OFFICE OF CFO	Cost Centre Manager	Mr Peter Prest	School/Unit	FIN	Division	Resources
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School/Unit	FIN																				
Division	Resources																				

Travel Diary

Daily Activity Record (not applicable for student except PHD and HRD students)

Enter details of the traveller's activities during the trip where the traveller is away from home for 6 nights or more.

1. Further information/ guidance to assist you in completing a valid Travel Diary is available by clicking on these hyperlinks.

Notes: If you have indicated within the BTR that you are travelling for less than 6 nights, you will not be asked to complete a Travel Diary.

Students are not required to complete a Travel Diary.

2. Enter place of activity for each day you are travelling.

Note: The Place of Activity is automatically pulled through from your reason for travel page, however you can overwrite these entries as required.

3. Enter start and finish times for activity for each day you are travelling.

Note: If you are attending a conference, a timeframe is automatically entered, please override as required.

4. Enter activity description for each day you are travelling.

Note: The Description of Activity is automatically pulled through from your reason for travel page, however you can overwrite these entries as required.

5. State whether the daily activity is for 'Personal' or 'Business' purpose.

Note: The Personal or Business description is automatically pulled through from your reason for travel page, however you can overwrite these entries as required.

6. Once the Travel Diary is complete, click the 'Save Travel Diary' button.

7. The Travel Diary will estimate the percentage of personal travel associated with your trip.

Note: If your personal travel exceeds 50%, the Travel Team will be in contact to discuss the implication further prior to finalising your travel.

8. You can export the information contained within your Travel Diary to Excel. This option becomes available once you have saved your travel diary.

9. Click the 'Next' button.

Travel Diary

Business Travel Request id: RESKChiv22062018. The F537 Business Travel Record must be completed for Australian Taxation Office purposes where the traveller is away from home for six nights or more. Failure to complete this form may result in the entire trip and all associated expenses being subject to Fringe Benefits Tax.

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

Instructions and Guidelines

1. **Classifying business and personal travel**
Insurance and FBT

Diary Details						
Date (in location)	Day of Week	Place of Activity	Time Started	Time Finished	Description of Activity	Business or Personal
21 Jun 2018	Thursday	Sydney			Personal	Personal
22 Jun 2018	Friday	Sydney			General Travel: screen shot	Business
23 Jun 2018	Saturday	Sydney			General Travel: screen shot	Business
24 Jun 2018	Sunday	Sydney			General Travel: screen shot	Business
25 Jun 2018	Monday	Sydney			General Travel: screen shot	Business
26 Jun 2018	Tuesday	Sydney			General Travel: screen shot	Business
27 Jun 2018	Wednesday	Sydney			Personal	Personal
28 Jun 2018	Thursday	Sydney			Personal	Personal

[Add additional day for timezone variation](#)

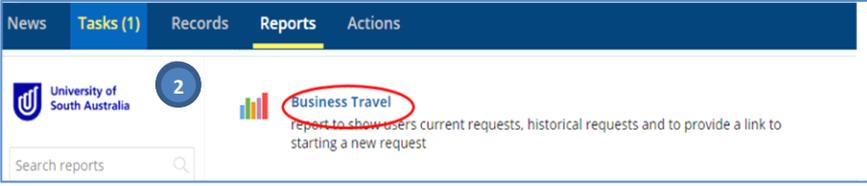
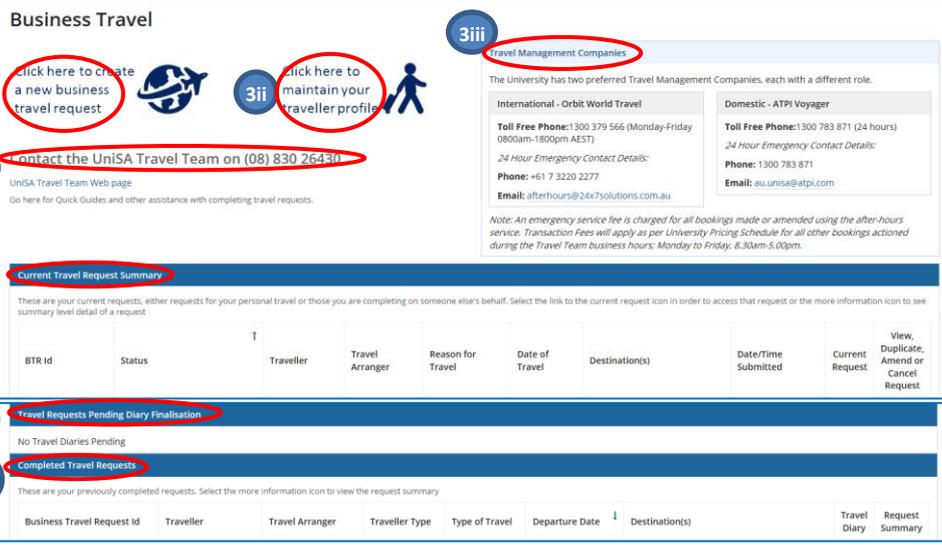
7. **Total Days:** 8 days travel consisting of 5 business days and 3 personal days. This equates to 37.5% personal travel

8. **Export to Excel:** Export to Excel is unavailable. Please click the 'Save Travel Diary' button to enable export

6. **SAVE TRAVEL DIARY**

9. **PREVIOUS** **NEXT**

Confirmation	
Lodge the BTR	Submit the BTR to the Travel Team to action.
<p>1. The BTR Confirmation page will appear and will advise:</p> <ol style="list-style-type: none"> i. Unique BTR Number. ii. The BTR will automatically advise you if you if you are covered via the University Travel Insurance Policy based on the answers to specific questions within the BTR. <p>2. Click the 'Finish' button.</p> <p>Notes: <i>If the BTR indicates that you are required to discuss your proposed travel further with the Insurance Department, you are required to follow these instructions to progress your travel request.</i></p> <p><i>If your trip is altered in anyway i.e. add more than 50% personal travel etc., you are required to contact the insurance office to discuss further.</i></p>	<div style="border: 1px solid #ccc; padding: 10px;"> <div style="text-align: center; margin-bottom: 10px;"> 1i </div> <div style="border: 1px solid #ccc; padding: 5px;"> <p style="text-align: center; margin: 0;">Business Travel Request: RESJAmey01022019 Confirmation</p> <p style="font-size: small; margin: 0;">Travel Arranger - Ms Jo Amey</p> <hr/> <div style="display: flex; justify-content: space-between; font-size: x-small; margin: 0;"> Traveller Details Reason for Travel Travel Arrangements Insurance, Risk & Finance Travel Diary Confirmation </div> <p style="margin: 5px 0;">You are about to submit request RESJAmey01022019 for approval</p> <p style="font-size: x-small; margin: 0;">Thank you for your enquiry with the UniSA Travel Team</p> <p style="font-size: x-small; margin: 0;">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</p> <p style="font-size: x-small; margin: 0;">You will need to contact the UniSA Insurance Office to make additional arrangements if your intended trip is altered and:</p> <ul style="list-style-type: none"> • 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. <p style="font-size: x-small; margin: 0;">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.</p> <p style="font-size: x-small; margin: 0;">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.</p> <p style="font-size: x-small; margin: 0;">• Your unique reference number is : RESJAmey01022019, please quote this number when referring to this particular request.</p> <p style="font-size: x-small; margin: 0;">If you have any further questions, please do not hesitate contacting the UniSA Travel Team on (08) 8302 6430</p> <div style="text-align: right; margin-top: 10px;"> 3 PREVIOUS FINISH </div> </div> </div>

Travel Home Page																																							
	View all BTRs submitted and their status. Ability to amended, delete and duplicate existing BTRs.																																						
1. Accessing your home page.	To access the Travel Profile Form, click on the following link – Business Travel Use your University Username and password to access the Appian site																																						
2. Click on the Business Travel link.																																							
<p>3. Your Homepage will contain all travel requests made by you or on your behalf:</p> <ol style="list-style-type: none"> Click here to create a new BTR. Click here to create or update your Traveller Profile. All relevant contact details are listed. All current (not travelled) BTRs will be listed here. <p><i>Note: The status of the BTR, along with the Travel Team member looking after your request will be listed within this table.</i></p> <ol style="list-style-type: none"> All travel diaries that require validation (after you return from your trip) will be listed here. All completed (travelled) BTRs will be listed here. <p><i>Note: After you return from your trip, if a Travel Diary is required to be validated, you will receive an e-mail reminder with instructions on how to validate your diary.</i></p>	 <p>3i Click here to create a new business travel request</p> <p>3ii Click here to maintain your traveller profile</p> <p>3iii Contact the UniSA Travel Team on (08) 830 26430</p> <p>3iii Travel Management Companies</p> <p>3iv Current Travel Request Summary</p> <table border="1"> <thead> <tr> <th>BTR Id</th> <th>Status</th> <th>Traveller</th> <th>Travel Arranger</th> <th>Reason for Travel</th> <th>Date of Travel</th> <th>Destination(s)</th> <th>Date/Time Submitted</th> <th>Current Request</th> <th>View, Duplicate, Amend or Cancel Request</th> </tr> </thead> <tbody> <tr> <td colspan="10">No Travel Diaries Pending</td> </tr> </tbody> </table> <p>3v Travel Requests Pending Diary Finalisation</p> <p>3vi Completed Travel Requests</p> <table border="1"> <thead> <tr> <th>Business Travel Request Id</th> <th>Traveller</th> <th>Travel Arranger</th> <th>Traveller Type</th> <th>Type of Travel</th> <th>Departure Date</th> <th>Destination(s)</th> <th>Travel Diary</th> <th>Request Summary</th> </tr> </thead> <tbody> <tr> <td colspan="9">These are your previously completed requests. Select the more information icon to view the request summary</td> </tr> </tbody> </table>	BTR Id	Status	Traveller	Travel Arranger	Reason for Travel	Date of Travel	Destination(s)	Date/Time Submitted	Current Request	View, Duplicate, Amend or Cancel Request	No Travel Diaries Pending										Business Travel Request Id	Traveller	Travel Arranger	Traveller Type	Type of Travel	Departure Date	Destination(s)	Travel Diary	Request Summary	These are your previously completed requests. Select the more information icon to view the request summary								
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Amend or cancel an existing BTR

- From the Business Travel home page, locate the travel request that you wish to amend/cancel.
- Click on the  symbol.

Current Travel Request Summary

Current Travel Requests

BTR Id	Status	Traveller	Travel Arranger	Reason for Travel	Date of Travel	Destination(s)	Date/Time Submitted	Current Request
RESJAmey20062018	Submitted	Joanne Marie Amey	Miss Rebecca Sutherland	general: test BTR ref no.	Wed: 20-Jun-2018	Canberra, Australia (CBR)	Tue: 19-Jun-2018 15:40	 View, Duplicate, Amend or Cancel Request

- Scroll to the bottom of the page.
- Click on **Notify of Amendment/Cancellation**

Business Travel Request : RESJAmey20062018

Traveller Joanne Marie Amey
Travel Arranger Miss Rebecca Sutherland
Approved in Principle By Mr Daren Murphy

Reason(s) for Travel

General Travel Summary

Purpose of Visit	Person Visiting	Organisation Visiting	Date From	Date To
test BTR ref no.		test BTR ref no.	20/06/2018	22/06/2018

Travel Arrangements

Flight Summary

From	To	Departure Date	Preferred Airline	Class
Adelaide, Australia (ADL)	Canberra, Australia (CBR)	20/06/2018	None stated	Economy
Canberra, Australia (CBR)	Adelaide, Australia (ADL)	22/06/2018	None stated	Economy

 Duplicate Request
 Notify of Amendment/Cancellation
 Close Summary

- Input the details of your required amendment or cancellation into the text box provided. Include as much information as possible.
- Click on 'Send to Travel Administrator'.

Details of required amendment or cancellation

 **SEND TO TRAVEL ADMINISTRATOR**

Note: The Travel Team member assigned to the submitted travel booking will make the required amendments/cancellation. You will then receive an email notification advising completion and or next steps.

Duplicate a BTR

- From the Business Travel home page, locate the travel request that you wish to duplicate.
- Click on the  symbol.

Current Travel Request Summary

Current Travel Requests

BTR Id	Status	Traveller	Travel Arranger	Reason for Travel	Date of Travel	Destination(s)	Date/Time Submitted	Current Request
RESJAmey20062018	Submitted	Joanne Marie Amey	Miss Rebecca Sutherland	general: test BTR ref no.	Wed: 20-Jun-2018	Canberra, Australia (CBR)	Tue: 19-Jun-2018 15:40	 View, Duplicate, Amend or Cancel Request

- Scroll to the bottom of the page.
- Click on  Duplicate Request.

Business Travel Request : RESJAmey20062018

Traveller Joanne Marie Amey
Travel Arranger Miss Rebecca Sutherland
Approved in Principle By Mr Daren Murphy

Reason(s) for Travel

General Travel Summary

Purpose of Visit	Person Visiting	Organisation Visiting	Date From	Date To
test BTR ref no.		test BTR ref no.	20/06/2018	22/06/2018

Travel Arrangements

Flight Summary

From	To	Departure Date	Preferred Airline	Class
Adelaide, Australia (ADL)	Canberra, Australia (CBR)	20/06/2018	None stated	Economy
Canberra, Australia (CBR)	Adelaide, Australia (ADL)	22/06/2018	None stated	Economy

 Duplicate Request  Notify of Amendment/Cancellation  Close Summary

- You can now scroll through the selected BTR, page by page. Amend any of the details as required.
- When you find the following  this refers to any date fields that you are required to be updated.

Note: You can now view each page of the pre-populated BTR and make the required changes. Follow the instructions from "Reason for Travel" on page 4.

Reason(s) for Travel

* Reason(s) for Travel General Travel
 Conference/Seminar
 Transnational Teaching
 Research Projects

General International and Domestic Travel

<input type="checkbox"/>	Purpose of Visit	Person Visiting	Organisation Visiting	Date From	Date To	
<input type="checkbox"/>	Attend UPH Project Meeting	UPH Team	University of Sydney	27-Jun-2018	28-Jun-2018	

 Please complete the edit of the arrangement and update the list prior to submitting the form

6  Purpose of Visit Attend UPH Project Meeting

Person Visiting UPH Team

Organisation Visiting University of Sydney

Date From 27/06/2018

Date To 28/06/2018