

HOW TO ORGANISE YOUR TRAVEL

STEP 1

Call / email Tertiary Travel on 08 6488 2721 (info@tertiarytravel.com) and organise your itinerary.

STEP 2

Students must fill out a [Travel Request Form](#). This **must** have your PG number on it and supervisors signature on it. Get your PG number from your supervisor or Estelle. Give this and a copy of your itinerary to Estelle to sign and then give it to Christine Riordan over at the School Administration. Staff do not need to complete the Travel Request Form.

Both staff and students must complete a Fieldwork Plan/Participant's Form and a Risk Assessment form, found here:

http://www.safety.uwa.edu.au/policies/field_work_procedures_in_rural_and_remote_areas.

STEP 3

Once Estelle has signed off on your form, complete [Trobexis](#) (see step 4). The Trobexis approval process can take a while **so don't leave it** until the last minute!

FAQs: see page 11.

TROBEXIS

STEP 4

Trobexis is located here: <https://www.trobexis.com/uwaprd/signon.aspx>. It can be found on the Financial Services webpage under “Finance Applications”. Log on using your staff number and PHEME password.

All **students** see Christine Riordan to get a staff login *even if you already have a casual-work staff number*. Existing numbers are not activated for Trobexis access.

Ensure you have pop-ups ENABLED in your browser window.

STEP 5




The screenshot shows the Trobexis.com website interface. At the top, there is a navigation bar with links: Portal Home, Search, Request Domestic Travel, Request International Travel, Forms, Calculators, Reporting, and Portal Help. Below this is the University of Western Australia logo and name. A dropdown menu is open under 'Request International Travel', showing options: Complex Request (Travel Agent) and Point-to-Point Request. The Point-to-Point Request dropdown is further expanded to show flight paths: Perth - Singapore - Perth, Perth - Hong Kong - Perth, Perth - Beijing - Perth, Perth - Los Angeles - Perth, Perth - London - Perth, and Perth - Dubai - Perth. Below the navigation is an 'Arranged Travel' section with a table header: Depart, Locality, Journey Title, Traveller, Req Date, Req #, and Approver.

In the top options, select either DOMESTIC TRAVEL or INTERNATIONAL TRAVEL. You will then have the option of a full/complex request or a point-to-point request. Point-to-point requests are common flight paths, such as Perth to London and back. If your full itinerary or destination does not appear here, choose full/complex request.

STEP 6

Trobexis.com

Portal Home Search Request Domestic Travel ▶ Request International Travel ▶ Forms ▶ Calculators ▶ Reporting Portal Help ▶

 **THE UNIVERSITY OF WESTERN AUSTRALIA**

Domestic Travel Request (Full)

Create Request → Estimate Cost → Submit for Approval → Approval Pending → Approval Obtained → Book Travel

Traveller Details

Select a Traveller --> **Get Traveller** Requisition Number

Journey Title * SGTSG conference

Departure Date * 11/01/2012 Return Date * 18/01/2012

Surname * DENHAM User ID (Traveller) 00079046

Given Name * EMILY Requisition Date 10/01/2012

Employee ID 00079046 Approval Status New

Business Unit (Faculty) Natural and Agricultural Sciences Travel Arranger DENHAM, EMILY

Branch (Org Unit) Ctr for Exploration Targeting Phone * 6448 2667

Traveller's Email * emily.denham@uwa.edu.au Mobile

Role Type Travel Arranger Facsimile

Traveller Type Employee Last Updated By Date Updated

* Denotes Mandatory Field

Create Requisition

Select "Get Traveller" and find your name. Many of the fields will then fill out automatically. The Journey Title is a simple description of why you are travelling. Make sure all the red marked fields are completed and then click Create Requisition. Students WILL NOT be able to use "Get Traveller" until they have activated their staff number.

STEP 7

Trobexis.com

Portal Home Search Request Domestic Travel Request International Travel Forms Calculators Reporting Portal Help

THE UNIVERSITY OF WESTERN AUSTRALIA

Domestic Travel Request (Full)

Create Request Estimate Cost Submit for Approval Approval Pending Approval Obtained Book Travel

Traveller Details **Purpose of Travel** Flights Accommodation Car Hire / Other Cost Estimates Confirmation

Traveller's Name: DENHAM, EMILY Requisition Number: 90003052

Nature of Travel...
 Business Travel
 Business / Private Travel
0 Total Private Days

Trip Reason: Conference

Purpose of Travel / Additional Details
Travelling to present at SGTSG conference.

Click here if you require a Leave Form
University Tax Policy
University FBT Overview

< Previous Next >

Once you have hit "Create Requisition" you will have a requisition number becomes your travel reference number. Select whether you are travelling just for business or also for private travel, select the reason for your travel and enter a short description.

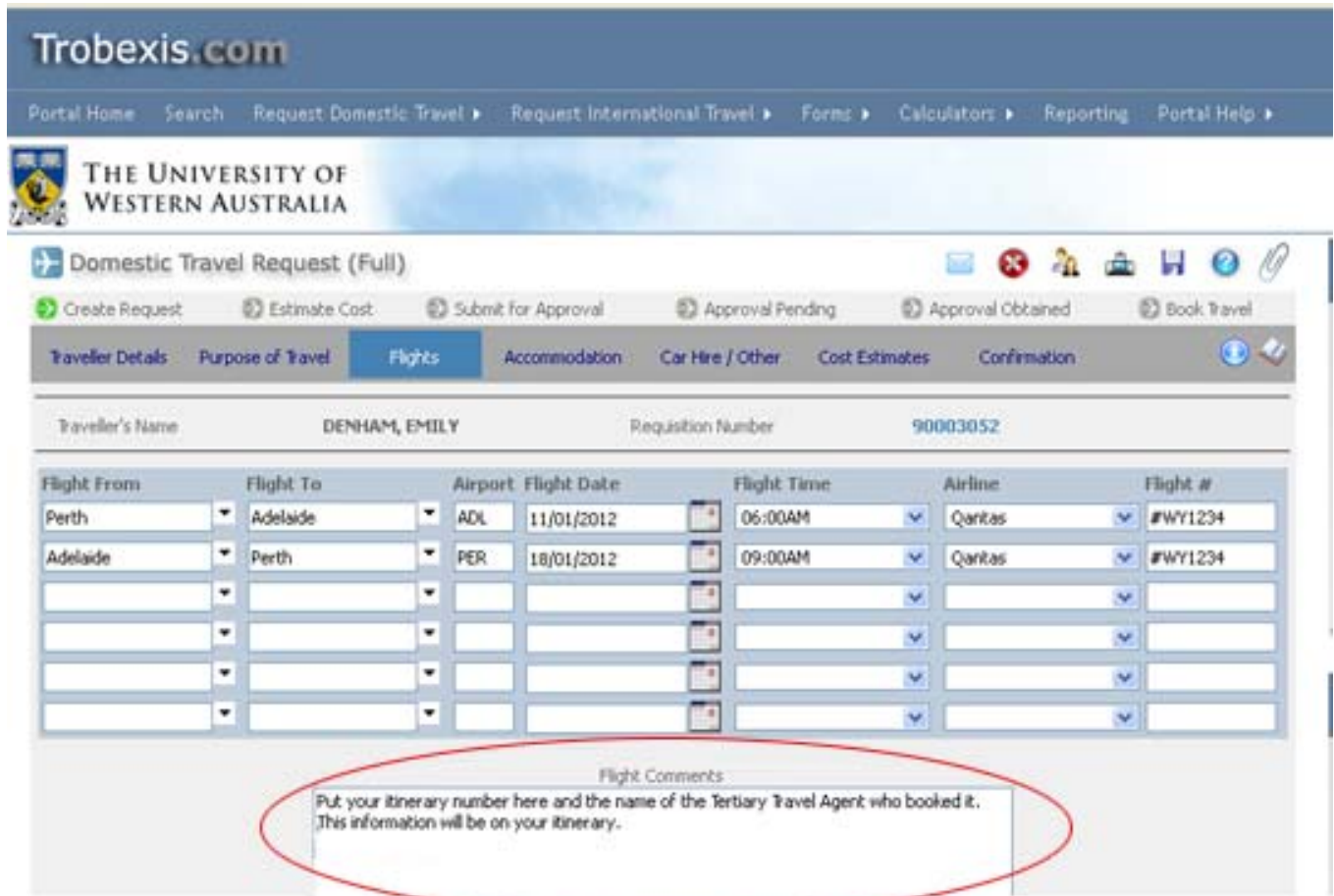
STEP 8

The screenshot shows a web browser window titled "Travel Activity Checklist - Mozilla Firefox" with the URL "https://www.trobexis.com/uwaprd/Forms/TravelActivityList.aspx". The page content includes the following elements:

- Page Header:** "Travel Activity Checklist" and the University of Western Australia logo.
- Introduction:** "The Travel Activity Checklist is used to undertake a risk assessment of the activities you will be undertaking on your journey. You need to select at least one item from the list below in order to submit your Travel Request for approval."
- Form Fields:**
 - Journey Title:** SGTSG conference
 - Date Requested:** 10/01/2012
 - Traveller Name:** DENHAM, EMILY
 - Requisition Number:** 90003052
- Question:** "Prior to assessing your travel activities, please answer the question below. Do you have a pre-existing medical condition?" with a dropdown menu set to "No".
- Instructions:** "Please indicate the activity or activities that you will be undertaking on your journey in the list below."
- Activity List:**
 - 1. Low or no risk activities
 - 2. Engaging in activities that UWA or its insurers would consider to be of a hazardous nature?
 - 3. Are you, or any other traveller, over 80 years of age?
 - 4. Will your travel be for a period greater than 12 months?
- Text Area:** "Please list any Company Assets to be taken on your Journey" with an empty text input field.
- Buttons:** "Save Activities" and "Close Window".

A Travel Activity Checklist should pop-up. Enter your relevant answers and hit "Save Activities". If you have selected "hazardous" ie for travel to Mali a popup will ask you to complete a Risk Assessment. Fill this out according to your completed Risk Assessment Form.

STEP 6



Trobexis.com

Portal Home Search Request Domestic Travel Request International Travel Forms Calculators Reporting Portal Help

THE UNIVERSITY OF WESTERN AUSTRALIA

Domestic Travel Request (Full)

Create Request Estimate Cost Submit for Approval Approval Pending Approval Obtained Book Travel

Traveller Details Purpose of Travel **Flights** Accommodation Car Hire / Other Cost Estimates Confirmation

Traveller's Name DENHAM, EMILY Requisition Number 90003052

Flight From	Flight To	Airport	Flight Date	Flight Time	Airline	Flight #
Perth	Adelaide	ADL	11/01/2012	06:00AM	Qantas	#WY1234
Adelaide	Perth	PER	18/01/2012	09:00AM	Qantas	#WY1234

Flight Comments

Put your itinerary number here and the name of the Tertiary Travel Agent who booked it. This information will be on your itinerary.

Complete your flight details as per your itinerary. Put the reference number of the itinerary and the travel agent's name under Flight Comments.

STEP 7

Travel Agent Cost Estimates

The purpose of this page is to facilitate obtaining a cost estimate from a University preferred Travel Agent, analyse the costs provided and select the appropriate cost for allocation purposes. Your approver will see the allocated costs and the cost estimates that were received.

Journey Title	SGTSG conference	Date Requested	10/01/2012
Traveller Name	DENHAM, EMILY	Requisition Number	90003052

Select a Travel Agent from the list below followed by the 'Request Estimate' button to obtain a cost estimate.

Please Select Travel Agent

- Please Select Travel Agent
- Campus Travel
- Tertiary Travel

COST ESTIMATES SENT TO DATE ARE LISTED BELOW

Travel Agent	Requested By	Date/Time Sent
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COST ESTIMATES RECEIVED TO DATE ARE LISTED BELOW

If you have booked your travel through Tertiary Travel (as you will have 90% of the time) select them and press “Request Estimate.” If your travel was arranged and paid for by an outside source, press “No Estimate Required”.

STEP 8

You will then need to wait for an hour or two for Tertiary Travel to update Trobexis with cost estimates. You will receive an email from Trobexis once this has occurred.

Cost Estimate Submitted
travelreq-finserv@uwa.edu.au
Sent: Mon 19/12/2011 3:29 PM
To: Emily Denham

Message | IR.html (11 KB)

Your cost estimate has now been submitted in relation to the attached Travel Request. Login to <https://www.trobexis.com/uwaprd> to view the details.

Estimate From	Tertiary Travel
Requisition Number	90002931
Traveller	[REDACTED]
Journey Title	Isotope Analyses
Funding	Not Allocated
Approver	Level
Trip Reason	Research

Click the link provided. This will take you to the main Trobexis screen, press the airplane and select "Cost Estimates."

Most Visited | Getting Started | Latest Headlines

Trobexis.com

Portal Home | Search | Request Domestic Travel | Request International Travel | Forms | Calculators | Reporting | Portal Help

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✓ Travel Request #90003052 deleted. # Requests Pending Approval : 0

Arranged Travel

Depart	Locality	Journey Title	Traveller	Req Date	Req #	Approver	Status		
28/01/2012	Domestic	SGTSG conference	[REDACTED]	22/12/2011	90002976	RYKEN-RAPP, RAY	Booking Requested		
11/01/2012	International	Isotope Analyses	[REDACTED]	19/12/2011	90002931	RYKEN-RAPP, RAY	Booking Requested		

Trobexis.com

Portal Home Search Request Domestic Travel Request International Travel Forms Calculators Reporting Portal Help

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EMILY DENHAM | Log Out

Domestic Travel Request (Full)

Create Request Estimate Cost Submit for Approval Approval Pending Approval Obtained Book Travel

Traveller Details Purpose of Travel Flights Accommodation Car Hire / Other **Cost Estimates** Confirmation

Traveller's Name DENHAM, EMILY Requisition Number 90003052

[Hide Travel Agent Cost Estimate & Your Comments](#)

Selected Travel Agent	Air Fares	Accommodation	Car Hire	Meals	Other	Total
Not Selected	340.00	0.00	0.00	0.00	0.00	0.00

Cost Estimate Comments

Travel Expense Category	Project / Grant	Uni. Funded	Ext. Funded	Self Funded	TOTAL
Airfare (601)					
Accommodation (608)					
Car Rental (606)					
Conference & Course Fee (611)					
Travel Document Costs (601)					
Transport - Non Car Rental (601)					
Other (601)					
+ More Rows					
Meals & Incidentals (No Travel Allowance)					
FST Liability		0.00			0.00
Employee Contribution (FST Estimator)				0.00	0.00
UNIVERSITY FUNDED TOTAL		0.00			0.00
GRAND TOTAL		0.00	0	0.00	0.00

Calculate

A popup screen will appear asking if you would like to select estimates – press yes. The boxes seen above will then fill. Make sure to enter the PG number you want to allocate the expense to and copy the amount of the expense into “Uni funded.” If some of the total cost is for airfare and some for accommodation or conference fees etc, fill out the PG numbers on separate rows and put the correct amount under “Uni funded”. Then press “calculate” and proceed to confirmation.

STEP 9

The screenshot shows the Trobexis.com website interface. At the top, there is a navigation bar with links: Portal Home, Search, Request Domestic Travel, Request International Travel, Forms, Calculators, Reporting, and Portal Help. Below this is the University of Western Australia logo and the user name WENDY CARTER with a Logout link. The main content area is titled 'Confirmation' and displays the following information:

Traveller's Name	PIRAJNO, FRANCES	Requisition Number	90003068
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Below the table, there are several checkboxes for policy acknowledgments:

- I have read and will comply with the [University Travel Policy](#)
- I have read and will comply with the [University Corporate Travel Insurance Policy](#)
- I have read and understood the [International SOS travel advice](#) if travelling overseas
- I have read and will comply with the [University Finance Manual Travel Policy](#)
- Where travel is booked and paid for by an external organisation, I confirm that I have emailed a copy of my itinerary to travel@uwa.edu.au to be uploaded into ISOS, in accordance with UWA Travel policy
- If I am taking any private travel, I understand that whilst the FBT on the private component of a trip is the University's cost, my approver has or will consider the appropriateness of the University incurring the FBT (and associated Payroll Tax). I understand that I may be required to make a private contribution towards the cost of travel in order to reduce the FBT to nil, or my University consultancy account may be used to fund any resulting FBT and Payroll Tax liability.
- I agree to meet my obligation of the cost of any private travel associated with a University trip, including any additional accommodation, meals or other airline costs that are outside of those associated with the business trip in its entirety.

At the bottom of the form, there is a note: **Policy Conditions will be referred to the Non-Profiled Traveller (Visitor) for acceptance and only appear above for reference purposes. You are not required to submit/finalise the Travel Diary on completion of the journey. This is the Travellers responsibility.**

On the right side of the page, there are two sidebars: 'Portal Links' with various policy and service links, and 'News & Updates' with a note about insurance coverage and contact information. A red arrow points to the scroll bar on the right side of the main content area.

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After you have read all the Travel Policies above tick **all** the boxes, then use the scroll bar on the right to get to the drop-down box where you select either Susie Cass as Level 1 Approver (or Estelle Dawes if Susie is away). Then hit the Submit for Approval button.

STEP 10

You will receive a further Trobexis email after your travel has been approved; telling you it is now time to book the travel.

FAQs

1. *How many extra days can I stay without incurring FBT under University Policy?* STUDENTS DO NOT PAY FBT.

- **2 days** personal travel (maximum of 1 day on either side of the business activity)
- if the duration of the business component of the trip is between 1 and 7 days.
- **4 days** personal travel (maximum of 2 days on either side of the business activity)
- if the duration of the business component of the trip is between 7 and 14 days.
- **6 days** personal travel (maximum of 3 days on either side of the business activity)
- if the duration of the business component of the trip is between 14 and 30 days.
- **20% of the total days** of the business component of the trip
- if the duration of the business component of the trip exceeds 30 days.

Total Private Travel Day(s) – The private component of a trip is the number of day(s) when an employee is not undertaking business activities.

Private travel day(s) INCLUDE Annual leave day(s) and any non-business related travel days which will deem the overall trip to have a dual purpose.

Private travel day(s) EXCLUDE –

- weekends that fall BETWEEN business activity day(s).
- day(s) spent travelling to and from business activity.
- Incidental day(s) or day(s) in transit and unavoidable delays between business activities due to public holidays and scheduling issues.
- For further information regarding incidental refer to -
http://www.finserv.uwa.edu.au/fin_accounting/tax/fbt_travel_guidelines

Should you require further clarification on the FBT estimate please contact the UWA Tax Team at Tax-finserv@uwa.edu.au or your School Manager.

2. *How long am I covered under University insurance for personal travel?*

Employees and students are permitted an additional 15% travel beyond their UWA study related travel to a maximum of 4 weeks additional travel.

NOTE: THIS DOES NOT MEAN YOU AUTOMATICALLY HAVE 4 WEEKS ADDITIONAL COVER. ie 40 days University related travel x 15% bonus = 6 days. You get 6 days bonus - if you are planning holiday/private travel beyond this time, you will need to purchase additional cover.

