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Overview

This Job Aid documents staff members’ self-service creation of an Official Travel request. This also applies to Travel Administrator’s creation of Official Travel Requests on behalf of staff members and non-staff members who do not have access to Umoja.

Objectives

This Job Aid will walk the staff members or authorized Travel Administrators through the process of creating an Official Travel request as well as sending the request for approval.

Please note that this Job Aid is a condensed version of the steps needed to perform this activity. A complete end-to-end version of the process can be viewed here:

- For Staff Members creating an Official Travel Request, [http://unsapuperform.umoja.un.org/gm/folder-1.11.10310?mode=EU](http://unsapuperform.umoja.un.org/gm/folder-1.11.10310?mode=EU)


Note: The above links will lead you to simulations, interactive “recordings” of the Umoja system used to help facilitate a hands-on learning experience.

Users can access simulations in three different modes:

- **Show me**: Users view a video of an entire transaction being conducted
- **Let’s do it together**: Users will be prompted to input data at key points during the transaction (recommended)
- **Try it**: Users can complete an entire transaction on their own, with no additional instructions provided

Enterprise Roles

Staff member self-service (available to those staff members with an access to Umoja, otherwise a Travel Administrator has the rights to create Travel Requests on staff or non-staff member’s behalf).

Please contact your administrative focal point if you are unsure who is performing this role in your Office.
Create Travel Request

1. Log into Employee Self Service Portal.

2. Click the Employee Self-Service SM tab at the top of the screen.

3. Click Create Official Travel.
4. Once you enter the Official Travel Page, you must click the checkboxes that acknowledge reading and understanding of the “Travel Initiation Pre-requisites”, and confirm that the supervisor, where applicable, has approved the trip and that the absence was recorded in Umoja Time Management.

**It is the Traveller's responsibility to ensure that these conditions are met prior to creating the Travel Request.**

5. Scroll back to the top of the page and click on *Start Form*.

6. Select *Travel Category* and *Travel Type*. 
7. Click on Overview to go to the next page.

8. Please read the details on this next page to familiarize yourself with travel policies. Acknowledge that you have understood the travel policies and click on General Data to go to the next page.

**Fill in the General Data Page**

1. Fill in all the details related to this trip and the official itinerary.

   ![General Data Page](image)

   **NOTE:** If you are combining any other UN Paid Travel, you will have to raise a second Travel Request and crossreference it to this Travel Request. To do this, enter the previous Travel Request Number (displayed when a Travel Request is sent for approval) in the Comments/Special Instructions field.

2. Below, select Applicable Subsistence, Subsistence Country and Subsistence Region.

   **NOTE:** as a default, the subsistence allowance will not be calculated for the day of return.
3. After all the **General Data** has been filled in, your screen should look similar to this:

![Itinerary Details](image)

To save time, the **Departure and Arrival City/Country** will auto-complete based on text that you type in these fields, which may eliminate the need to search for a specific value.

4. **Save Draft** and go to **Additional Data**.

**NOTE:** If you need to add any attachments in **General Data**, you can only do so once you **Save Draft** as the trip needs to be assigned a number by the system.

**Fill in the Additional Data Page**

1. At the top of the screen click on “**I want the system to calculate the Subsistence Allowance**”

![Additional Data for Travel](image)

**NOTE:** This is not applicable if you are a national staff travelling within Home Country (local policy applies) or if you are in receipt of an Ad Hoc DSA.
2. Next, click on Yes if you require *Travel Advance*. The system will calculate the amount automatically.

3. Answer all other questions listed on this page.

4. If you are taking leave in conjunction with this travel, please indicate the approved leave in the space provided after you answer Yes to that question.
5. Click on *Enter Deductions* to select the dates for which you are not entitled to DSA or any portion of it. For example, you would choose this if during your official trip accommodation or all three meals are provided by the organizers.

**NOTE:** As a default, the system will not calculate DSA entitlement for the last travel date; therefore there is no need to indicate it here.

6. Click *Accept* to verify the selected deductions.

7. You will return back to the *Additional Data Screen.*

8. The *Travel Processing Office* is displayed as one applicable to your Duty Station by default.

9. Select the appropriate choice for *Tickets to be issued through.*

11. In the Estimated Costs column, enter your estimated ticket cost (obtained from a Travel Agent or online search). Make sure the correct currency is selected in the Currency column.

12. Click on the Calculate button next to Terminal Expenses. This will open a pop-up window where you can enter if the transportation be provided in New York or your duty station, to/from the airport, enter the number of trips, etc..

13. Click on Accept, to return to the Enter Estimated Costs page.
14. If you have any other travel related expenses, such as excess baggage, click on Add New to enter.

![Estimated costs table]

15. Click on Save Draft, then Accept. (the screen should be similar to the screenshot below)

![Screen with estimated costs and buttons]

16. You will return to the Additional Data Screen.

17. The system will default the cost assignment applicable for your trip. If, however, the trip should be charged to another cost center or split across multiple cost centers, please click on Change Cost Assignment and update accordingly.

18. Enter Travel Justification if the request was not submitted 21 days in advance. (The system will prompt you to do this, you will not be able to move on unless you enter the reason for late submission)
19. The bottom portion of your Additional Data Screen should now look similar to this:

![Additional Data Screen](image)

20. Click on Save Draft and go to Personal Deviation.

**Complete the Request and Send for Approval**

1. On Personal Deviation page, click Yes if, for example, you are taking any annual leave in conjunction with this travel or if you are deviating from your official route for personal reasons and convenience. Otherwise click No and click on Review and Send.

2. On the final page you have a chance to review all your data, make sure it is correct or go back and change if needed. Click on Save and Send for Approval if you want to submit the request now. If not, then Save Draft and you can get back to it later.
3. The final screen should look similar to the screenshot below. If there is any error message, it will appear on this screen. Please follow the instructions on the screen in regards to medical and security requirements as prompted by the system.

Note: The system automatically triggers a request for security clearance, but in “draft” status only. The Traveller is still required to log into the DSS website/TRIP (trip.dss.un.org) and finalize the submission of the request. The Traveller is responsible for obtaining his/her security clearance.
General overview on the subsequent approval process

The Official Travel Request, once submitted for approval, will go to a Travel and Shipment Approver (formerly Certifying Officer) and to a Travel Processing Officer (formerly Travel Unit) for approval and ticketing.

Amending or Deleting an Official Travel Request

You can change or cancel a travel request or view its status on the Employee Self Service (ESS) front Screen under Traveller Work Center.

Find Status of Existing Travel Request

In the Traveller Work Center, scroll to the right to see the current approval status of a particular Travel Request. For example, you can view if a Request is waiting for approval from Travel and Shipment Approver or the Travel Processing Office.

Deleting an Official Travel Request

BEFORE THE REQUEST HAS BEEN SUBMITTED FOR APPROVAL

Before the request has been submitted for approval, it can be changed or deleted by following these steps:

1. Identify your Official Travel Request under the Official Travel tab.
2. If deletion is required, click on Delete and follow the subsequent steps.
AFTER THE REQUEST HAS BEEN SUBMITTED FOR APPROVAL OR HAS BEEN APPROVED

Once the request has been submitted for approval to a Travel and Shipment Approver, the request can be cancelled by following the steps below:

1. Go to Employee Self Service (ESS) – Traveller Work Center
2. Find and highlight the Official Travel Request you wish to cancel in All My Trips tab.
3. Click on Request Cancelation.

Amending an Official Travel Request

BEFORE THE REQUEST HAS BEEN SUBMITTED FOR APPROVAL

1. Go to Employee Self Service (ESS) – Traveller Work Center
2. Under the Official Travel tab, find and highlight the request you wish to amend.
3. Click on Change to amend the request.
AFTER THE REQUEST HAS BEEN SUBMITTED FOR APPROVAL OR HAS BEEN APPROVED

Once the request has been sent for approval or has been certified and approved, a staff member or a Travel Administrator will have to contact the Certifying Officer (by phone or email, but outside Umoja) to amend the request or return to the staff member to apply any changes.