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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/qm/folder-1.11.10310?mode=EU>
- For Travel Administrators creating an Official Travel Request on behalf, <http://unsapuperform.umoja.un.org/qm/folder-1.11.10396?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

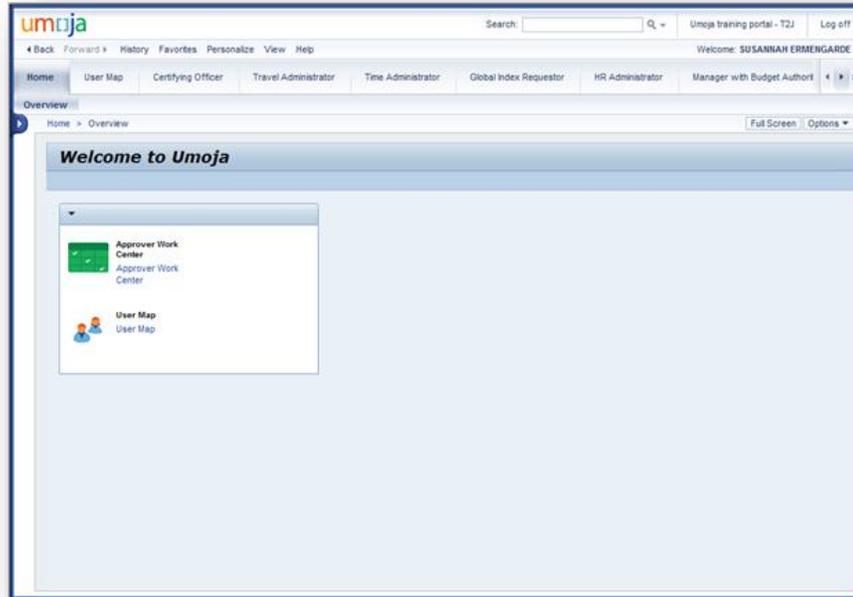
Enterprise Roles

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.

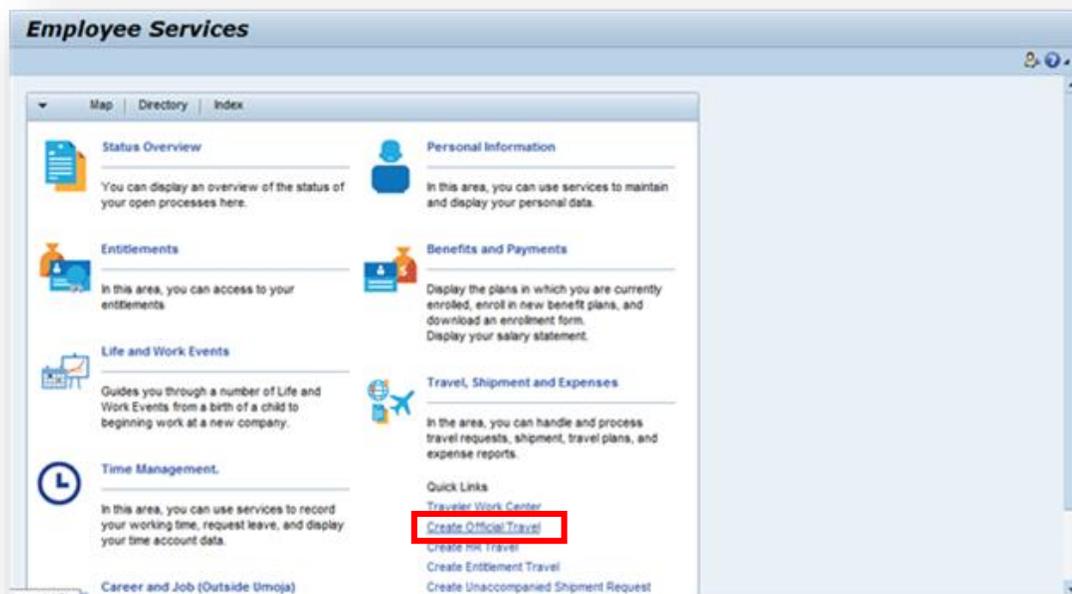
Create Travel Request

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*

Employee Self-Service SM



- 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.

Create Travel Request for 00172144

1 Important Information 2 Start Form 3 Overview 4 General Data 5 Additional Data 6 Personal Deviation 7 Review and Send 8 Completed

4 Previous Step Start Form

IMPORTANT INFORMATION - Travel Initiation Pre-requisites

The following pre-travel requirements are mandatory and are your individual responsibility.

(a) Travel documents: Please note that your national passport and UN Laissez-Passer (UNLP) should be valid for at least six months from the date of your return from official travel.

(b) Full name: Please ensure that your full name is identical both in the national passport and UNLP.

(c) Visa: Please ensure that visas for all your travel points and the re-entry into your duty station are valid.

(d) Security clearance: The UN rule is that no travel, funded by the UN, should be undertaken without first obtaining the security clearance, if applicable. Please log on to <https://ids.un.org> and obtain the required security clearance(s) prior to commencement of travel. You can also access this website in i-Seek/Secretariat/Departments and Offices/DSS/TRP. Absence of security clearance for any type of travel that is paid by the United Nations will render the traveler ineligible for any type of insurance coverage and compensation (MAP and Appendix-D) benefits.

(e) Medical clearance: Please ensure that you have obtained the required medical clearance from your medical officer (MO) or the designated medical officer (DMO) before traveling. For more information, please refer to the Medical Evacuation and Compensation (MEC) Manual.

I acknowledge that I have read and understand the above requirements. It is totally my responsibility to comply with them.

I certify that my Supervisor/Manager has agreed to my leave and trip, accordingly:

Quick Links

ECSC
TDS Department of Safety and Security

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

Previous Step Start Form

- Select *Travel Category* and *Travel Type*.

Start Form

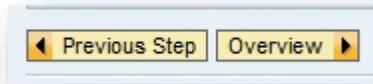
Choose the type of travel from the drop-down menu and click the 'overview'

Travel Category * Official Travel

Travel Type * 01. Official business

00. Within Mission Travel
01. Official business
02. Training
03. Temporary Duty (TDY)
04. Sabbatical
05. Escort - Medical
06. Medical evacuation
07. Security evacuation
09. Med/Sec Evac-Frm Pol U
10. Med/Sec Evac-UNMEM(MIL)

- Click on *Overview* to go to the next page.



- 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

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

A screenshot of a web form titled 'Basic Details'. At the top, there are two tabs: 'Calendar of Trips' and 'Attachments (0)'. The form contains several fields: 'Travel Start Date/Time' (23.06.2014 00:00), 'Travel End Date/Time' (27.06.2014 00:00), 'Traveller Type' (Staff), 'Number of Travellers' (1), 'Journey Type' (Round-Trip), 'Work Start Date/Time' (23.06.2014 09:00), and 'Work End Date/Time' (27.06.2014 17:00). The 'Reason' field contains 'Umoja Conference'. A 'Comments/Special Instructions' field is at the bottom. Two callout boxes with red arrows point to the date/time fields: one on the left says 'This info will populate automatically once the itinerary details are entered below.' and one on the right says 'Please include the exact time and date of your work schedule (not your travel schedule)'.

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.

- 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

Please specify **ONLY** the official itinerary here. Connecting points or stopover(s), if any, should not be included except when a forced overnight is required to reach the destination or there is a change in mode of transportation. Personal deviation details, if any, should be clearly indicated in screen #6.

Additional itinerary lines can be created by clicking icons on the far right.

Itinerary Details for:

Departure Date/Time	Departure City/Country	Mode of Travel	Arrival Date/Time	Arrival City/Country	Applicable Subsistence	Subsistence Country	Subsistence Region
23.06.2014 00:00	PORT-AU-PRINCE,HAITI	01 Commercial Aircraft	23.06.2014 00:00	NEW YORK,USA	1 DSA	USA	New York (First 30 Days)
27.06.2014 00:00	NEW YORK,USA	01 Commercial Aircraft	27.06.2014 00:00	PORT-AU-PRINCE,HAITI	2 DSA/MSA Not Applicable	United Nations	Subsistence Not Applicabl

Navigation: Previous Step | Additional Data | Save Draft

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*”

Initiating Travel for: Official business Travel For Prepared By SUSANNAH ERMENGARDE Employee Group International Staff Employee Subgr
E-mail ID Contract Type Fixed Term Master Cost Centre

Navigation: Previous Step | Personal Deviation | Save Draft

Additional Data for Travel

Subsistence Allowance/Deductions

Allow the system to calculate the Subsistence Allowance

Click Allow the system to calculate the Subsistence Allowance

Subsistence Allowance the fixed amount payable by the organization to cover traveller's expenses, accommodations, meals and incidentals. The Per diem begins upon arrival at the authorized destination.

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.

- Next, click on *Yes* if you require *Travel Advance*. The system will calculate the amount automatically.

Additional Data for Travel

Subsistence Allowance/Deductions

Allow the system to calculate the Subsistence Allowance

Number of Deductions:

Travel advance requested: * Yes No

Select the **Yes** radio button in the **Travel advance requested** field.

- Answer all other questions listed on this page.

Additional Data for Travel

Subsistence Allowance/Deductions

Allow the system to calculate the Subsistence Allowance

Travel advance requested: * Yes No

Travel Processing Office: *

Tickets to be issued through: * Commercial Travel Provider (i.e. Travel Agency) UNDP/Other UN Agency Member

Estimated Costs:

Cost Assignment: *

- 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.

Is there any other travel type paid by UN undertaken in conjunction with this travel (e.g. Official travel combined with Home Leave)?: * Yes No

Is there leave taken in conjunction with this travel? (Not applicable for Home Leave, Family Visit or Reverse Education Grant. Select "No" for these travel types): * Yes No

Please enter the type and date(s) here: *

- 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 chose this if during your official trip accommodation or all three meals are provided by the organizers.

Additional Data for Travel

Subsistence Allowance/Deductions

Allow the system to calculate the Subsistence Allowance

Number of Deductions: Enter Deductions

Click the **Enter Deductions** button to select the appropriate deductions.

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.

Deductions					
Day of Week	Date	No DSA/MSA (100% deduction)	Accommodation provided (50% deduction)	All 3 meals provided (30% deduction)	SG's delegation (60% deduction)
Friday	01.05.2015	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saturday	02.05.2015	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sunday	03.05.2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monday	04.05.2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tuesday	05.05.2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wednesday	06.05.2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thursday	07.05.2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Friday	08.05.2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saturday	09.05.2015	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sunday	10.05.2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monday	11.05.2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tuesday	12.05.2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wednesday	13.05.2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Click *Accept* to verify the selected deductions.
- You will return back to the *Additional Data* Screen.
- The *Travel Processing Office* is displayed as one applicable to your Duty Station by default.
- Select the appropriate choice for *Tickets to be issued through*.

Travel Processing Office: * ESCAP BANGKOK

Tickets to be issued through: * Commercial Travel Provider (i.e. Travel Agency) UNDP/Other UN Agency

10. Click on *Enter Estimated Costs*. A new screen will appear.

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.

Estimated costs			
<input type="button" value="Calculate"/> <input type="button" value="Add New"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>			
Expense Type	Calculate	Currency	Estimated Costs
Airfare Ticket Cost		USD-United States Dollar	<input type="text"/>
Subsistence Allowance-Stf Mb		USD-United States Dollar	5,656.00
Terminal Expenses	<input type="button" value="Calculate"/>	USD-United States Dollar	
Sum			

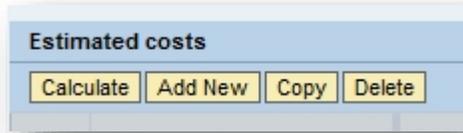
12. Click on the *Calculate* button next to *Terminal Expenses*. This will open a pop-up window where you can enter if the transportation be provided in New York or your duty station, to/from the airport, enter the number of trips, etc..

Terminal Expenses shall be deemed to cover all expenditures for transportation and incidental charges between the airport or other point of arrival or departure and the hotel or other place of dwelling in respect to the staff member and each family member authorized to travel at UN expense. One line item per eligible traveller is required. Use expense type "Terminal Expenses" for the staff member and "Terminal Expenses" for the family member to calculate total terminal expenses for each individual traveller.

	Number of Eligible Arrivals/Departures				
New York : Number of trips for which transportation was NOT provided free of charge	<input type="text" value=""/>	X	63.00	=	0.00
New York : Number of trips for which transportation was provided free of charge	<input type="text" value="0"/>	X	11.00	=	0.00
Other Locations : Number of trips for which transportation was NOT provided free of charge	<input type="text" value="0"/>	X	38.00	=	0.00
Other Locations : Number of trips for which transportation was provided free of charge	<input type="text" value="0"/>	X	11.00	=	0.00
Total Terminal Expenses					0.00

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.



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

Expense Type	Receipt Curre...	Receipt Amount	Estimated Costs	Currency	Traveler ID	Services Provider	Comment	Routing No.	Reference No.	Calculate
Airfare Ticket Cost-Ticket 1	USD-United ...	1,200.00	1,200.00	USD						
Excess Baggage	USD-United ...	50.00	50.00	USD						
Subsistence Allowance-Stf Mbr	USD-United ...	1,512.00	1,512.00	USD						
Terminal Expenses	USD-United ...	202.00	202.00	USD						Calculate
Sum			2,964.00	USD						

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:

Subsistence Allowance/Deductions
 I want the system to calculate the Subsistence Allowance

Number of Deductions:

Travel Processing Office: *

Tickets to be issued through: *
 Commercial Vendor UNDP/Other UN office Member State Self Ticket Not Applicable

Estimated Costs:

Travel advance requested: *
 Yes No

Advances:

Cost Assignment: *

Justification for not submitting the travel request 21 calendar days in advance of the anticipated departure date:

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.

Travel Start Date/Time: 23.06.2014 00:00
 Travel End Date/Time: 27.06.2014 00:00

Itinerary Details

Itinerary Details for: [REDACTED]

Departure Date/Time	Departure City/Country	Mode of Travel	Arrival Date/Time	Arrival City/Country	Applicable Subsistence	Subsistence Country
23.06.2014 00:00	PORT-AU-PRINCE, HAITI	01 Commercial Aircraft	23.06.2014 00:00	NEW YORK, USA	1 DSA	USA
27.06.2014 00:00	NEW YORK, USA	01 Commercial Aircraft	27.06.2014 00:00	PORT-AU-PRINCE, HAITI	2 DSA/MSA Not Applicable	United Nations

Estimated costs: 2,964.00 Number of Deductions: 0 Advances: 1,714.00 United States Dollar

Cost Assignment: 100.00 % Cost Center 10606 (UNSOM Gen Admin), Funds Center 10606 (UNSOM Gen Admin), Fund 10UNA (10UN)

Final Action

Save Draft I only want to save my travel request and send it later

Save and Send for Approval I want to save my travel request and send it now for further processing. I confirm that I have entered all data to the best of my knowledge.

I am aware that, within two calendar weeks after completion of travel, I am required to submit, on line, the related travel expense report (claim) in accordance with the Section 11 of the UN Travel Regulations. Failure to comply with this requirement will result in automatic recovery of my travel advance(s) through payroll deduction. If, on review of my claim, it is determined that travel advance exceeds the approved amount, the overpayment will be recovered through payroll deduction.

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.

◀ Previous Step Save and Send for Approval

- Travel request 0000000587 was saved and submitted successfully.
- Medical clearance is required for this type of travel. Please contact your Medical Service and ensure clearance prior to commencement of travel
- Request for security clearance has been sent to TRIP. Ensure to obtain security clearance prior to commencement of travel
- 100.00 % will be assigned acc. to trip costs assignment guidelines

◀ Previous Step Save and Send for Approval

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*.

My Trips and Expenses

All My Trips (20) Official Travel (11) HR Travel (3) Entitlement Travel (5) Lump Sum Request (3) Shipment Request (0)

View: [Standard View] | Display PDF Form | Display | Change | Copy | Delete | Create Official Travel

Trip Number	Start Date	End Date	Travel Category/Type	Destination
6050	14.12.2014	20.12.2014	OT- 1. Official business	GENEVE,GE,SWITZERLAND
5971	22.12.2014	23.12.2014	OT- 3. Temporary Duty (TDY)	NIAMEY,NIGER
5970	22.12.2014	23.12.2014	OT- 3. Temporary Duty (TDY)	NIAMEY,NIGER
5962	17.12.2014	17.12.2014	OT- 1. Official business	LOANO,ITALY
5961	14.12.2014	14.12.2014	OT- 1. Official business	ALOANDIA,GO,BRAZIL
5833	14.12.2014	24.12.2014	OT- 1. Official business	PANAMA CITY,PANAMA
5692	14.12.2014	14.12.2014	OT- 1. Official business	PARIS,75,FRANCE
5631	14.12.2014	24.12.2014	OT- 1. Official business	PANAMA CITY,PANAMA
5599	14.12.2014	21.12.2014	OT- 1. Official business	PANAMA CITY,PANAMA
5481	03.11.2014	05.11.2014	OT- 1. Official business	SALEM,WV,USA

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

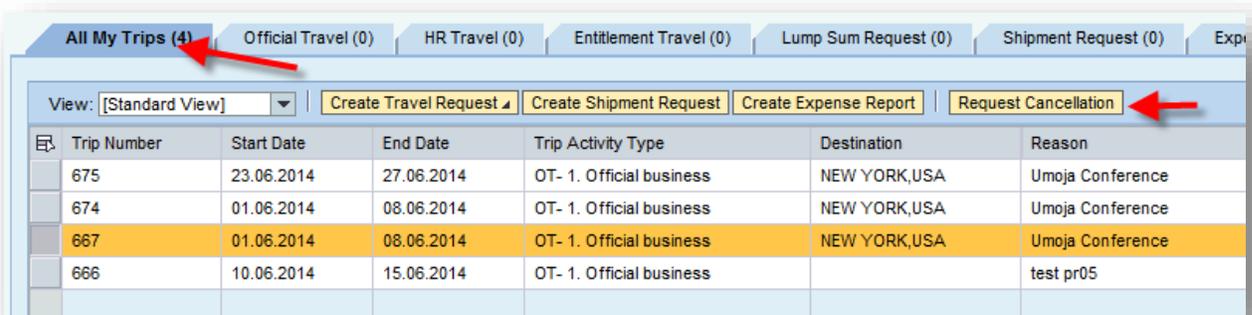
Before the request has been submitted for approval, it can be changed or deleted by following these steps:

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 Cancellation*.

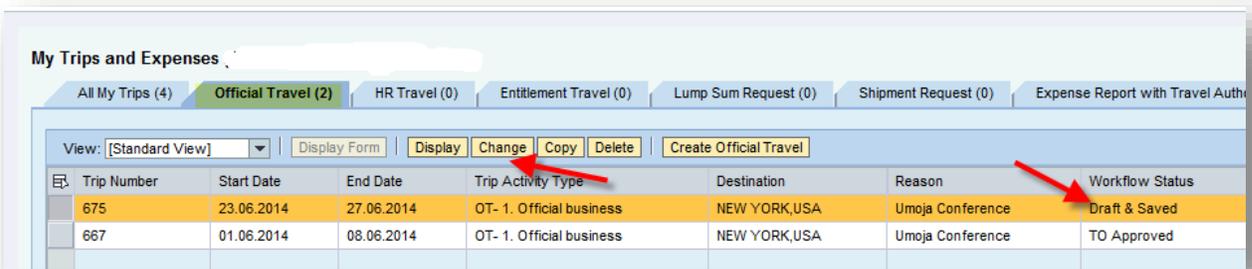


The screenshot shows the 'All My Trips (4)' tab selected. The 'Request Cancellation' button is highlighted with a red arrow. The table below shows the list of trips.

Trip Number	Start Date	End Date	Trip Activity Type	Destination	Reason
675	23.06.2014	27.06.2014	OT- 1. Official business	NEW YORK,USA	Umoja Conference
674	01.06.2014	08.06.2014	OT- 1. Official business	NEW YORK,USA	Umoja Conference
667	01.06.2014	08.06.2014	OT- 1. Official business	NEW YORK,USA	Umoja Conference
666	10.06.2014	15.06.2014	OT- 1. Official business		test pr05

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.



The screenshot shows the 'Official Travel (2)' tab selected. The 'Change' button is highlighted with a red arrow. The table below shows the list of trips.

Trip Number	Start Date	End Date	Trip Activity Type	Destination	Reason	Workflow Status
675	23.06.2014	27.06.2014	OT- 1. Official business	NEW YORK,USA	Umoja Conference	Draft & Saved
667	01.06.2014	08.06.2014	OT- 1. Official business	NEW YORK,USA	Umoja Conference	TO Approved

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.