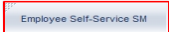


## ESS - Create Official Travel

### Create an Official Travel Request

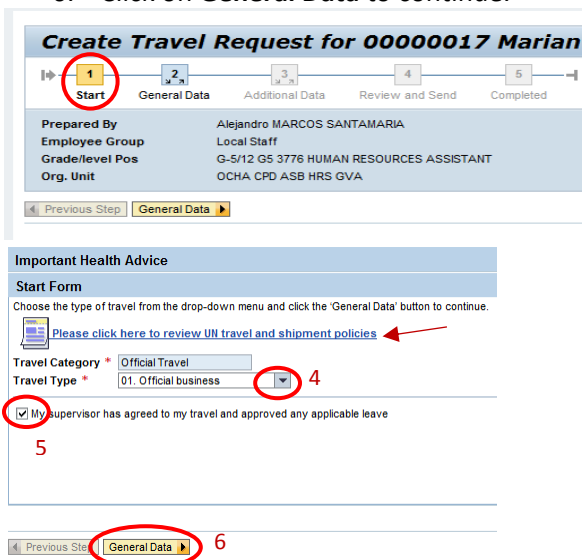
**PRIOR TO RAISING A TRAVEL REQUEST:**

- **Ensure that your supervisor has agreed to your proposed travel and approved any absence from the office in the Time & Attendance module.**
- **Travelers are required to submit their Travel Requests at least 21 days prior to their departure date. Failure to do so will require users to provide justification for late submission.**

1. Log into Employee Self-Service Portal.
2. Click the **Employee Self-Service SM** tab at the top of the screen.  And then Click **'Traveler Work Center'** on the bottom right hand corner of the page under **'Travel, Shipment and Expenses'**
3. From the Traveler Work Center, Click **Create Travel Request>Create Official Travel** to begin the process of creating Official Travel Request.

**Start Page**  On the Start page, review the UN travel and shipment policies.

4. Please select the appropriate **Travel Type** from the drop-down list.
5. Confirm that your supervisor has agreed to your proposed travel and approved any absence from the office (eg. Official Business w/ travel, annual leave, etc....)
6. Click on **General Data** to continue.



**Create Travel Request for 0000017 Marian**

1 Start 2 General Data 3 Additional Data 4 Review and Send 5 Completed

Prepared By: Alejandro MARCOS SANTAMARIA  
 Employee Group: Local Staff  
 Grade/level Pos: G-5/12 G5 3776 HUMAN RESOURCES ASSISTANT  
 Org. Unit: OCHA CPD ASB HRS GVA

Previous Step | **General Data**

**Important Health Advice**

**Start Form**

Choose the type of travel from the drop-down menu and click the 'General Data' button to continue.

[Please click here to review UN travel and shipment policies](#)

Travel Category \* Official Travel  
 Travel Type \* 01. Official business

My supervisor has agreed to my travel and approved any applicable leave

Previous Step | **General Data**

General Data Page

7. Select the **Traveler Type** from the drop-down.
8. The **Number of Travellers** field (populated from travellers on itinerary lines)
9. Select the **Journey Type** from the drop-down menu.
10. Complete **Work Start Date/Time & Work End Date/Time**. Enter the date/time expected to commence and complete your work at the destination-this information is used to make supporting travel arrangements.
11. Enter **Travel Purpose** – Enter specific and detailed information for the purpose of the travel.
12. Enter **Comments/Special Instructions** (if applicable), as shown below:

**Create Travel Request for 0002842 Ana Isabel RODRIGUEZ ROSALE**

1 Start 2 General Data 3 Additional Data 4 Review and Send 5 Completed

Prepared By	Alejandro MARCOS SANTAMARIA	Employee Subgroup	Profe
Employee Group	International Staff	Duty Station	SS00
Grade/level Pos	P-4/09 P4 6644 SUPPLY OFFICER	E-mail ID	RODR
Org. Unit	DMS DMS SA RIU		

Previous Step | Additional Data | Save Draft

General Data

Calendar of Trips | Attachments (0)

Information can only be entered by the user in white fields. Blue fields are not editable and will be populated automatically by the system.

**Basic Details**

Traveller Type: \* Staff 7  
 Number of Travellers: \* 8 8  
 Journey Type: \* Round-Trip 9  
 Work Start Date/Time: \* 05.03.2018 09:00 10  
 Work End Date/Time: \* 09.03.2018 17:00  
 Travel Purpose: \* 11  
 Travel related to the Event:   
 Comments/Special Instructions: \* 12  
 Attend conference on greenhouse gasses in Vienna from 5-9 March 2018

13. As required, complete the **Departure Date(s)**.
  14. Click the Matchcode icon in the **Departure City/Country** field to search for the departure city/country. In the event that the location you are travelling to/from is not available, please refer to the separate Job Aid entitled 'Add a City'.
- NOTE:** Only enter Origin and Destination – do not enter connecting points unless there is a business requirement or change in mode of transportation.
15. Click **Mode of Travel** drop-down menu and select the appropriate mode of transportation.
  16. Enter **Arrival Date**
  17. Enter **Arrival City/Country**
  18. Select **Subsistence Region**. Use the Matchcode on **Subsistence Region** field to perform the search.

19. To add a new itinerary line click on **Add New Itinerary** button
20. Complete the details for the returning trip as shown below, selecting **'2 DSA/MSA Not Payable'** from the **Applicable Subsistence** drop-down menu.

**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 in destination or there is a change in mode of transportation. Personal deviation details, if any, should be clearly indicated below.

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

Itinerary Details: Ms. Ana Isabel RODRIGUEZ ROSALES 20.05.1963, 00002842

13	14	15	16	17	18	19
Departure Date	Departure City/Country	Mode of Travel	Arrival Date	Arrival City/Country	Applicable Subsistence	Subsistence Region
03.03.2018	new york	01 Commercial Aircraft	04.03.2018	VIENNA,AUSTRIA	1 DSA	All Areas
10.03.2018	VIENNA,AUSTRIA	01 Commercial Aircraft	10.03.2018	VIENNA,AUSTRIA	2 DSA/MSA Not Payable	Subsistence Not Applicabl

21. Click **Yes** or **No** to indicate if a personal deviation is requested.
22. If **“Yes”** was selected, the Deviation Waiver will appear.
23. Provide **Requested Itinerary (Personal Deviation)** in the free text box below:
24. Click **I agree and accept the above terms and conditions** of the Deviation Waiver
25. Click the **Save Draft** or **Review and Send** button to proceed.

21 Personal Deviation:  Yes  No

22 Deviation Waiver

I understand that the United Nations is authorizing the lowest applicable

I am hereby requesting the travel agent to book a personal deviation, as between the official authorized itinerary and my personal deviation and

23 REQUESTED ITINERARY: Requesting to return on 12 March 2018 from Vienna.

Consequently, I agree to reimburse the United Nations for all course of the personal deviation travel.

I agree and accept the above terms and conditions

24 Previous Step Additional Data Save Draft

Additional Data Page

Create Travel Request for 00002842

1 Start 2 General Data 3 Additional Data 4 Review and Send

26. If applicable, click **Enter Deductions** button and mark boxes as needed.
  - a. Select appropriate deductions under the *Enter Deductions* functionality.

Create Travel Request for 00002842 Ana Isabel RODRIGUEZ ROSALES

1 Start 2 General Data 3 Additional Data 4 Deductions 5 Additional Data 6 Review and Send 7 Completed

Prepared By: Alejandro MARGOS SANTABARRA  
Employee Group: International Staff  
Grade/Level/Pos: P-4/RS P4 0644 SUPPLY OFFICER  
Employee Subgroup: Duty Station  
Duty Station: E-mail ID

Day of Week	Date	No DSA/MSA (100% deduction)	Accommodation provided (50% deduction)	All 3 meals provided (30% deduction)	SO's delegation (60% deduction)
Wednesday	21.02.2018	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Thursday	22.02.2018	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Friday	23.02.2018	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saturday	24.02.2018	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sunday	25.02.2018	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monday	26.02.2018	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tuesday	27.02.2018	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wednesday	28.02.2018	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thursday	01.03.2018	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

27. On the **Addition Data** screen, choose **Yes** for **Travel Advance Requested** if indeed you wish to receive a travel advance. If you chose **‘No’** the full amount due will be paid upon processing the corresponding Expense Report.
28. The traveller can select how the travel advance will be disbursed. Options are **EFT** or **Other**:
  - **EFT** (Electronic Funds Transfer) -user can select his/her bank account
  - **Other** (UNDP, Cheque or Cash) -enter instructions in the Remarks field for TSA review
29. The **Travel Processing Office** is selected by default based on the traveler’s duty station
30. The **Tickets to be issued through** radio button will default to **Commercial Travel Provider**. However, it can be changed by selecting one of the options to the right, as shown below. If ticket is NOT required, e.g. travel is by UN vehicle or UN aircraft please select the option to the far right ‘No ticket provided by the Organization’.

31. Click the **Enter Estimated Costs** button to enter the approximate costs for the trip (see table of common expense types below).

- Enter the estimated ticket cost. You may obtain this estimate any reliable source such as an internet booking tool or from a previous travel.
- Press **Enter** to automatically populate the **Personnel # of the traveler** field as shown below.
- Click on the **Calculate** tab and select the appropriate airport terminals to determine the **Terminal Expenses** payable.



Additional expenses, such as Excess Baggage, can be added by clicking the **Add New** button.

32. 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. Details of the other cost assignment are to be obtained off-line.

Expense Type	Calculate	Currency	Estimated Costs	Equivalent to	Currency	Personnel # of the traveler	Services Provider
Airfare Ticket Cost		USD-United States Dollar	800.00	0.00	USD	00002842-Ana Isabel RODRIGUEZ ROS...	
Subsistence Allowance-SfMbr		USD-United States Dollar	1,188.00	1,188.00	USD		
Terminal Expenses	Calculate	USD-United States Dollar	250.00	0.00	USD		
<b>Sum</b>				<b>1,188.00</b>	<b>USD</b>		

	Number of Eligible Arrivals/Departures	Amount per leg	Total amount
New York : Number of trips for which transportation was NOT provided free of charge	2	75.00	= 0.00
New York : Number of trips for which transportation was provided free of charge		14.00	= 0.00
Other Locations : Number of trips for which transportation was NOT provided free of charge	2	47.00	= 0.00
Other Locations : Number of trips for which transportation was provided free of charge		14.00	= 0.00
<b>Total Terminal Expenses</b>			<b>0.00</b>

- Click **Yes** or **No** for voluntary downgrade, as applicable.
- Click **Yes** or **No**, as applicable, if higher standard of accommodation has been approved. If 'Yes' please ensure that the approved TTS.3 form is uploaded as an attachment to the request.
- Click **Yes** or **No**, as applicable.
- Click **No**, if no other trips paid by the UN were undertaken in conjunction with this travel.



If this trip involves two different travel types (i.e. Official Business and Home Leave) , separate travel requests must be raised. If this is the case, select **Yes** and enter the

other Travel Request number to cross reference with this travel request. Please refer to the Job Aid **'Create Travel Combining Two Different Travel Categories'** for assistance on this topic.

37. If the Travel Request is submitted less than 21 calendar days prior to departure date, select the appropriate reason from the drop-down menu.
38. If **"Exigency of service/operational circumstance"** or **"Other"** is selected, you are required to provide specific and detailed explanation in the comments box.
39. Click **Review and Send** button to go to the next page.

The screenshot shows a form with several questions and a justification box. The questions are:

- 33. Is a voluntary downgrade of entitled class of service requested? \*  Yes  No
- 34. Has authorization to a higher standard of accommodation been granted on exceptional basis? If yes, please attach signed approval form. \*  Yes  No
- 35. Is the Traveller a member of an organ or subsidiary organ of the UN subject to the standard of accommodation under ST/SGB107/Rev.6?  Yes  No
- 36. Is any other U.N. travel taken in conjunction with this travel? \*  Yes  No
- 37. Justification for not submitting the travel request 21 calendar days in advance of the anticipated departure date: \*  (Other (provide details))
- 38. Justification Details: \*  (Emergency security situation in Bogota)

At the bottom, there are three buttons: **Previous Step**, **Review and Send** (highlighted), and **Save Draft**.

### Review and Send Page

Under **Review and Send** check the **Itinerary Details**.

40. Select the **Save and Send for Approval** radio button to confirm information.

The screenshot shows the **Final Action** section with two radio buttons: **Save Draft** and **Save and Send for Approval** (selected).



Ensure to submit an Expense report within 14 calendar days of return to avoid an automatic recovery of any travel advance (including lump sum payments).

41. Click the **Save and Send for Approval** button to submit Travel Request for approval.

The screenshot shows the navigation bar with three buttons: **Previous Step**, **Save and Send for Approval** (highlighted), and **Save Draft**.



Once submitted, the Travel Request is sent to the Travel and Shipment Approver associated with the cost assignment entered in the Travel Request.

42. 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.

- Request for security clearance has been sent to TRIP. Ensure to obtain security clearance prior to commencement of travel
- A medical clearance is required for this type of travel. Please, contact your local UN Medical Service for clearance prior to your travel.
- Travel request 0000299200 was saved and sent successfully

**NOTE:** In the event that the system displays a warning message (yellow triangle) stating that the overall budget is exceeded please contact your TSA as soon as possible. The system does not stop the submission of the request but the TSA will not be able to approve unless they make funds available.

**TIP:** It is recommended that upon submission of the Travel Request the traveller checks the status of the document in the Traveller Work Center at regular intervals.

### *Requesting Self-Ticket*

All travellers must obtain approval for any self-ticketing option via an Umoja travel request prior to the purchase of the ticket. Accordingly, as with any travel request, travellers must submit their request no later than 21 calendar days prior to the anticipated trip date to allow sufficient time for processing and approvals. Travel Processing Officers (TPO's) will evaluate any self-ticket request and approve, if deemed advantageous to the Organization. TPOs will communicate the maximum reimbursable amount for a particular ticket to the traveller, so as to avoid any misunderstandings during the reimbursement process. Travelers are reminded that current travel policy requirements must still be strictly observed when exercising the self-ticket option (e.g. compliance with the 16 days advance purchase policy, pre-approval of need to travel, class of service entitlement, use of the most economical route, etc.). All claims for reimbursement in the expense report must be supported by a scanned copy of the traveller paid invoice and proof of travel should be retained by the traveller in line with existing instructions.

The following steps described in this job aid are to be substituted from above with the following actions:

- Step 30 – For 'Ticket to be issued by' - The radio button for 'Self Ticket' should be selected instead of the default 'Commercial Travel Provider' and estimated cost entered for the self-ticket
- Step 31a – Please select 'Add New' and select 'Airfare Self Ticket Cost' ('Airfare Self Ticket Cost FMbr' for family members) or 'Train/Bus/Ferry/Other-SelfTck' ('Train/Bus/Ferry/Other-SelfTck- FMbr' for family members) if travel is by other surface means and enter estimated costs for the self-ticket
- As indicated above, reimbursement is only for a particular ticket upon approval of the request by the TPO. DO NOT purchase ticket(s) prior to the approval of your request as reimbursement is NOT guaranteed.

### *Most commonly used expense types*

The following are the most commonly used expense types in the Umoja Travel module:

- Airfare Ticket Costs
- Terminal Expense
- Daily Subsistence Allowance
- Excess Baggage
- Local Transportation (Taxi, local bus, etc...)
- Subsistence Allowance Adjustment
- Visa Fees
- Communication Costs (e.g. wifi)
- Meeting materials (e.g. Presentation charts, etc...)