



Quantum travel processing training

Project Management Team

04/01/2023





Agenda



Overview of UNall Travel



Entering or updating travel profile



Entering or updating travel plans



Making travel requests

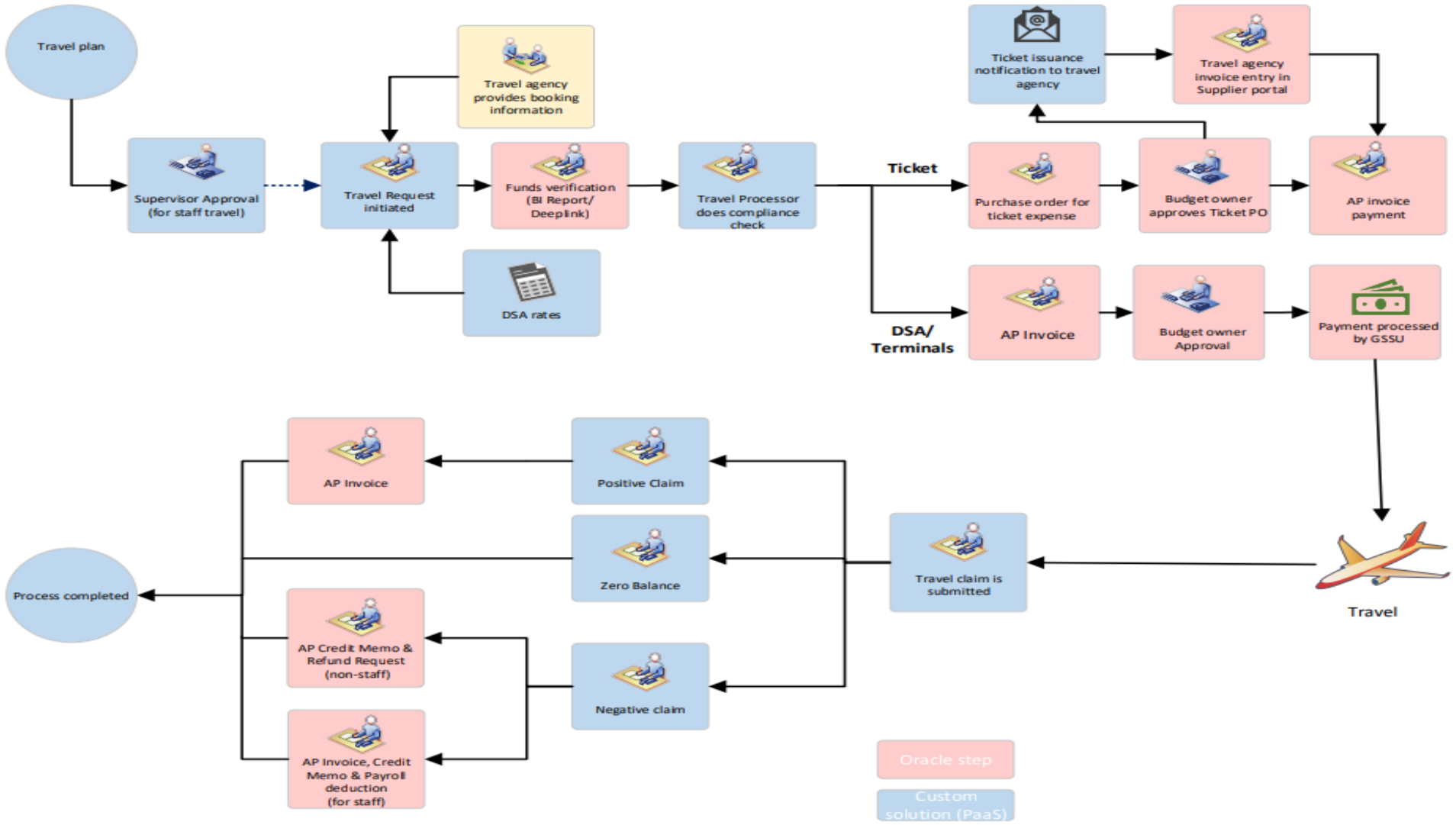


Submitting travel claims



Questions & discussion

Overview of the Travel process



Overview of the Travel process

The travel process will be split across UNall and Quantum:



The front end of the travel process including making travel profiles, travel plans and submitting travel requests will take place in UNall.



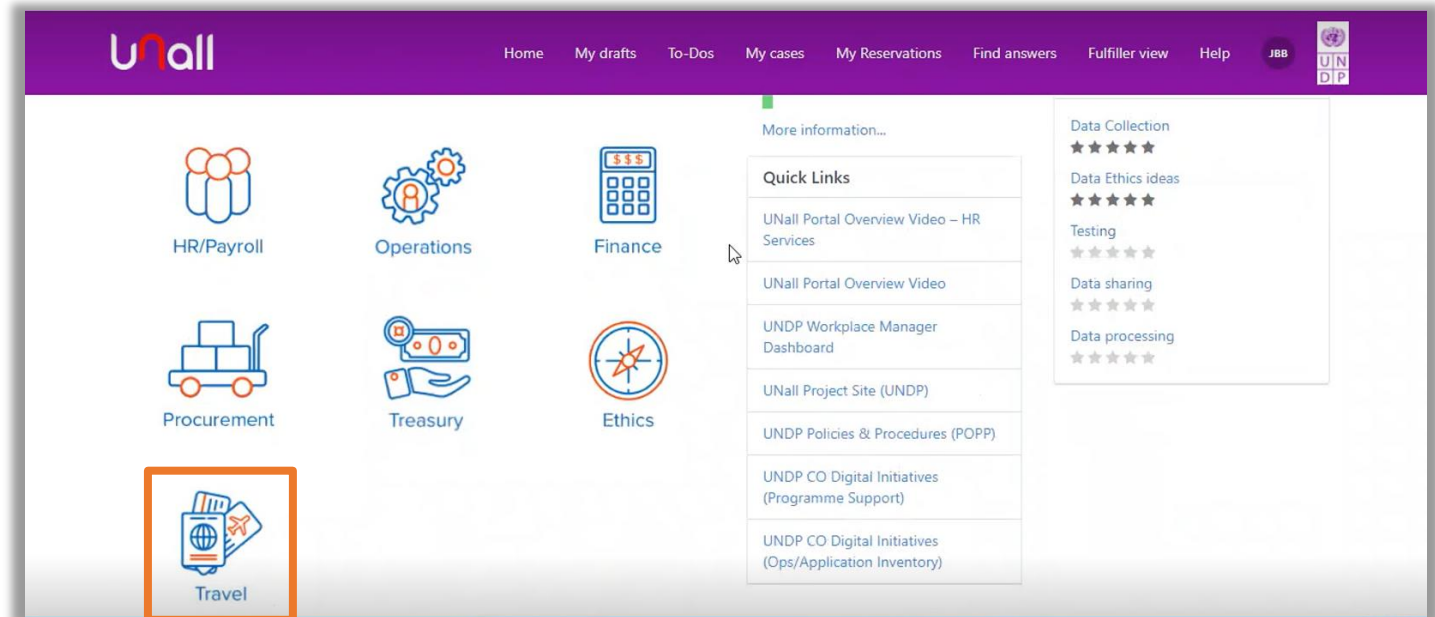
The latter part of the process i.e., submitting travel claims will take place in the Quantum platform.

Overview of Travel in UNall

You can access the travel module from the UNall homepage

When you login to the UNall portal, you can access the travel app by selecting the **travel icon** (towards the bottom of the home page).

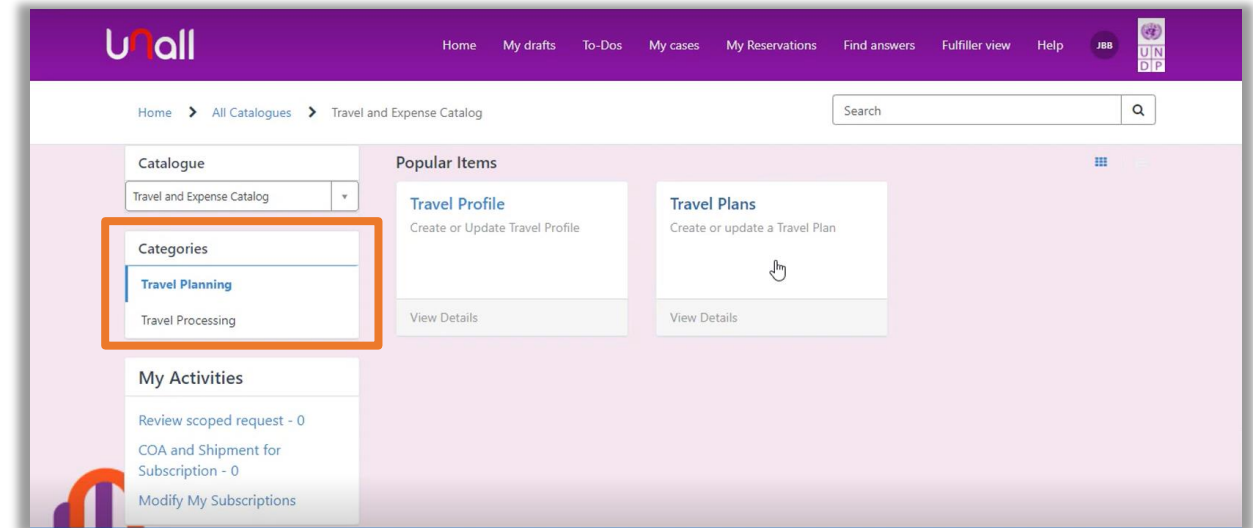
You will be redirected to another page from where you can make travel plans or process travel requests.



Overview of Travel in UNall

All travel plans and requests need to be submitted in Unall

- On the left side of the page under categories you will see two options:
 - Travel planning
 - Travel processing
- If you click on travel planning, you will be able to create or update a travel profile and travel plan.
- On the other hand, travel processing will allow you to submit travel requests.



Travel Planning: How to enter or update the travel profile

Travel profiles need to be created, before any plans can be entered in UNall

You can use the travel profile to create or update a travel profile. To do so:

1. Select travel profile, and you will be redirected to another page
2. In the first tab which says 'travel profile action' select create or update depending on whether you are creating a new profile or updating an existing one
3. Complete the fields in the travel profile – some fields will be auto populated (e.g., username) based on the information saved in the system
4. Select submit

Once you select a submit, a ticket will be created for you in UNall

The image displays two screenshots of the UNall web application interface, illustrating the steps to create or update a travel profile. The first screenshot shows the 'Travel and Expense Catalog' page with the 'Travel Profile' option highlighted in the 'Popular Items' section. The second screenshot shows the 'Travel Profile' form with the 'Travel Profile Action' dropdown set to 'Create', and the 'Submit' button highlighted. The form fields include 'User' (Jaya Babu BOBBA), 'First Name' (Jaya Babu), 'Last Name' (BOBBA), 'Middle Name', and 'Email' (jayababu.bobba@undp.org).

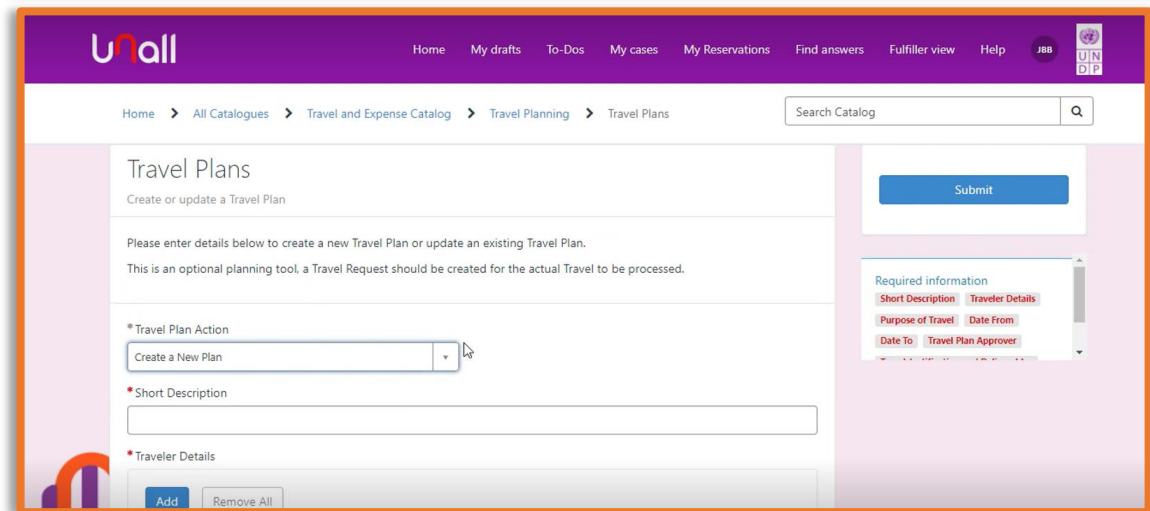
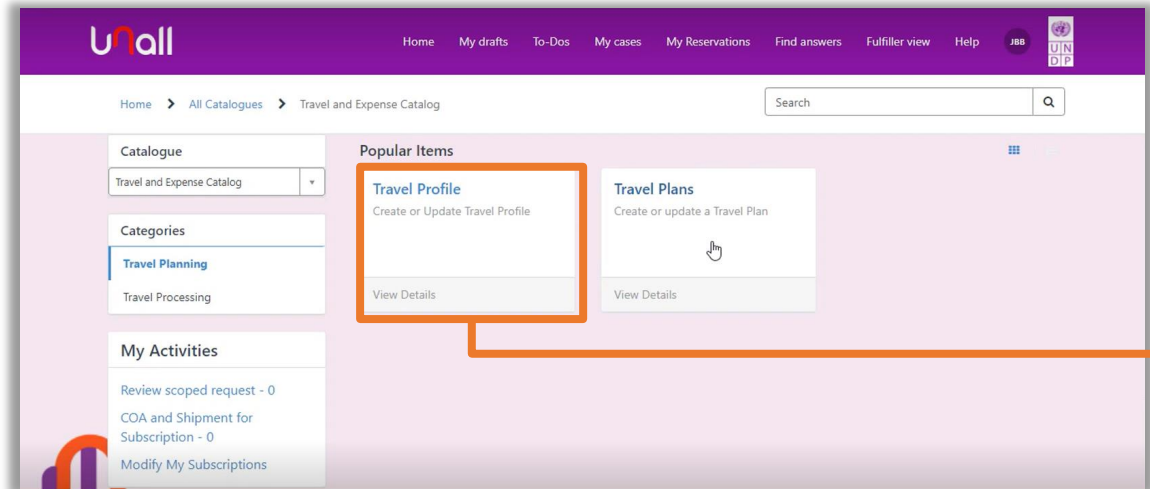
Travel Planning: How to enter or update travel plans

Once a travel profile is created, travel plans can be entered in UNall

Within travel plans, you can enter your new or existing travel itineraries:

1. Select travel plan, and you will be redirected to another page
2. In the first tab which says 'travel plan action' select create or update depending on the desired action
3. Enter a short description of the travel plan
4. Enter the traveler details (for yourself or on behalf of whom you are entering the details) as well as travel details (e.g., date, approver details etc.)
5. Modify or add DSA calculations
6. Add or modify project details
7. Include attachments (if applicable)
8. Select submit for approver review

Note: you can only enter travel plans for those colleagues, for whom travel profiles exist.



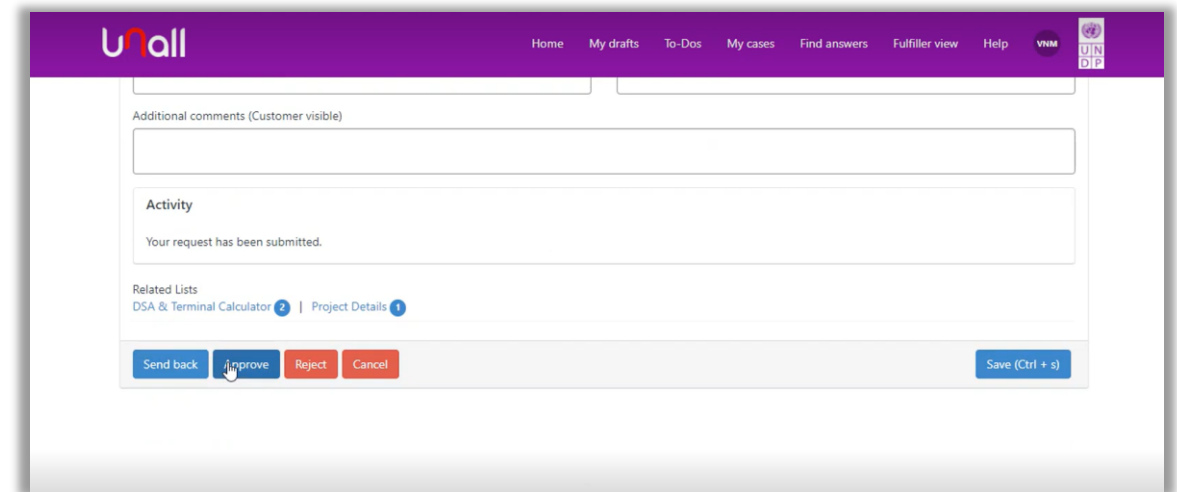
Steps 2-8

Travel Planning: How to enter or update travel plans

Travel requests need to be approved by the designated approvers

Once the request has been submitted:

- The travel plan approver will receive a notification and will be able to approve, reject, or take additional actions
- The budget approver will also receive a notification and will be able to approve, reject, or take additional actions



Travel Planning: Making requests

Once travel plans have been submitted, travel requests can be made

To make a travel request you need to:

1. Click on the travel icon (towards the bottom of the home page)
2. Select the Travel and Expenses catalog option from under the catalogue section on the left-hand side

3. Select the Travel Request option

You will be redirected to another page where you can create or update a travel request

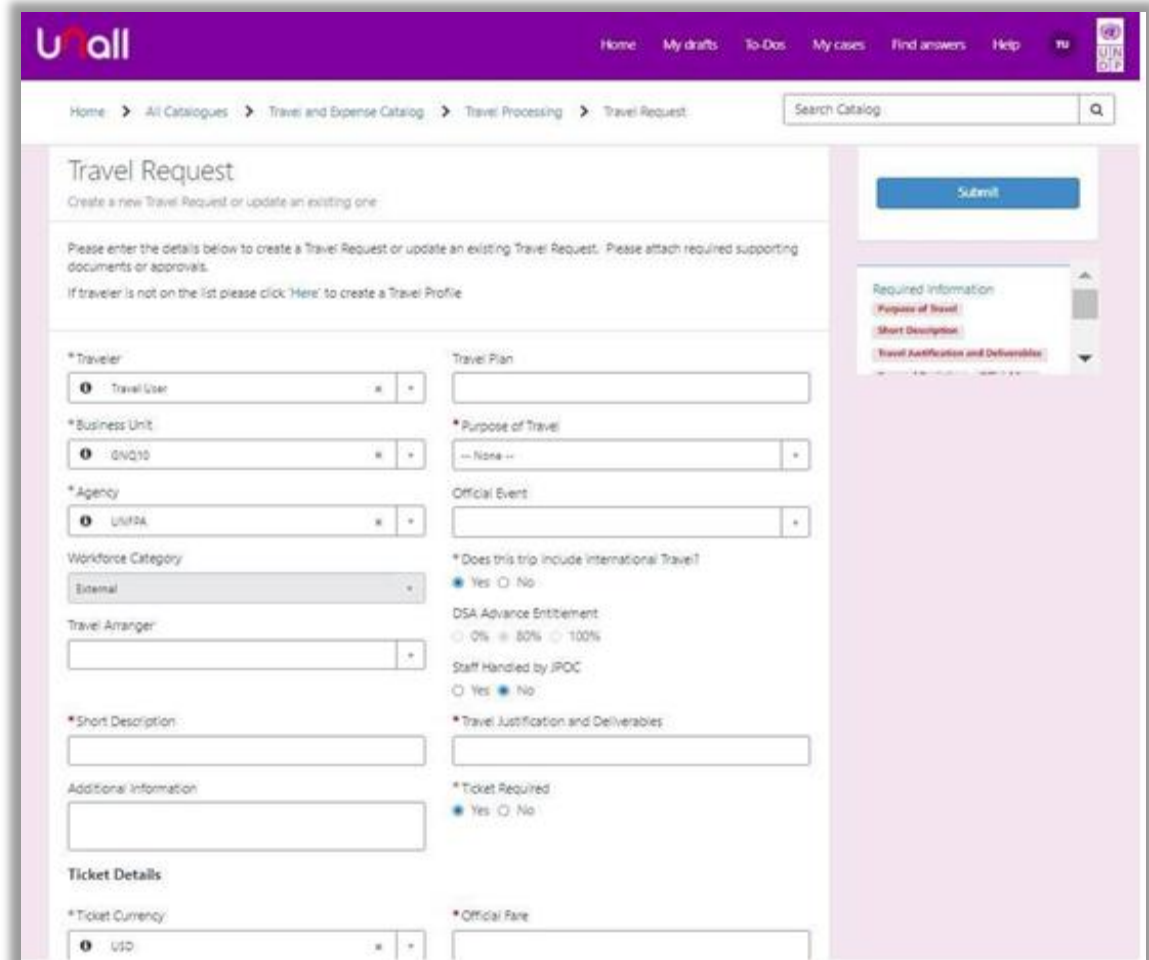
The image displays two screenshots of the UNall portal interface. The top screenshot shows the home page with a navigation menu at the top and a grid of icons for HR/Payroll, Operations, Finance, Procurement, Treasury, and Ethics. A 'Travel' icon is highlighted with an orange box and labeled '1'. The bottom screenshot shows the 'Travel and Expense Catalog' page with a search bar and a 'Travel Request' option highlighted with an orange box and labeled '2'. The 'View Details' link for the 'Travel Request' option is also highlighted with an orange box and labeled '3'.

Travel Planning: Making requests

Travel requests also need to be submitted in UNall

Once the travel request page opens you can start filling out the details on the form:

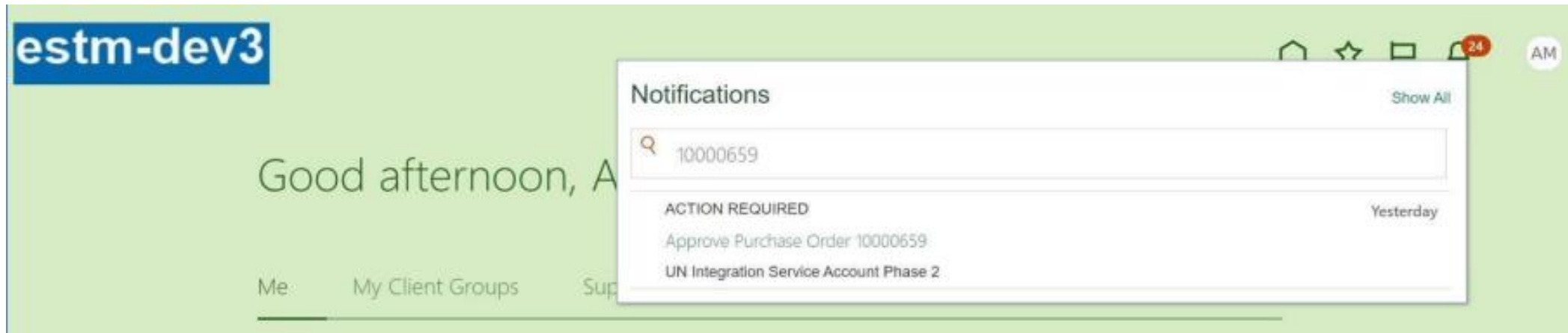
1. Fill in the traveler's name (based on this some other fields will auto populate)
2. Enter the traveler's name (based on this some other fields will auto populate e.g., business unit, index no. etc.)
3. Select the approved travel plan from the list of drop-down options (if the travel plan is not approved, it will not be displayed in the drop-down list)
4. Review and edit the fields which are auto-populated based on the travel plan information
5. Fill out other details on the form
6. Agree to the declarations on the travel request form
7. Select submit to submit the travel request



The screenshot displays the UNall Travel Request form. The header includes the UNall logo and navigation links: Home, My drafts, To-Do's, My cases, Find answers, and Help. A search bar is located in the top right corner. The breadcrumb trail reads: Home > All Catalogues > Travel and Expense Catalog > Travel Processing > Travel Request. The main heading is "Travel Request" with a sub-heading "Create a new Travel Request or update an existing one". Below this, there is a "Submit" button. The form instructions state: "Please enter the details below to create a Travel Request or update an existing Travel Request. Please attach required supporting documents or approvals. If traveler is not on the list please click 'Here' to create a Travel Profile". The form is divided into several sections: *Traveler (with a dropdown menu showing "Travel User"), *Business Unit (dropdown showing "GND10"), *Agency (dropdown showing "UNIPA"), Workforce Category (dropdown showing "External"), Travel Arranger (dropdown), *Short Description (text input), Additional Information (text input), *Ticket Currency (dropdown showing "USD"), *Ticket Details (dropdown), *Purpose of Travel (dropdown showing "None"), Official Event (dropdown), *Does this trip include International Travel? (radio buttons for Yes/No, with "Yes" selected), DSA Advance Entitlement (radio buttons for 0%, 80%, 100%), Staff Handled by JPOC (radio buttons for Yes/No, with "No" selected), *Travel Justification and Deliverables (text input), *Ticket Required (radio buttons for Yes/No, with "Yes" selected), and *Official Fare (text input). A "Required Information" sidebar on the right lists "Purpose of Travel", "Short Description", and "Travel Justification and Deliverables".

Approving travel requests

Once a travel request is submitted in UNall, the travel invoice and purchase order will have to be approved in Quantum, through the notifications section.

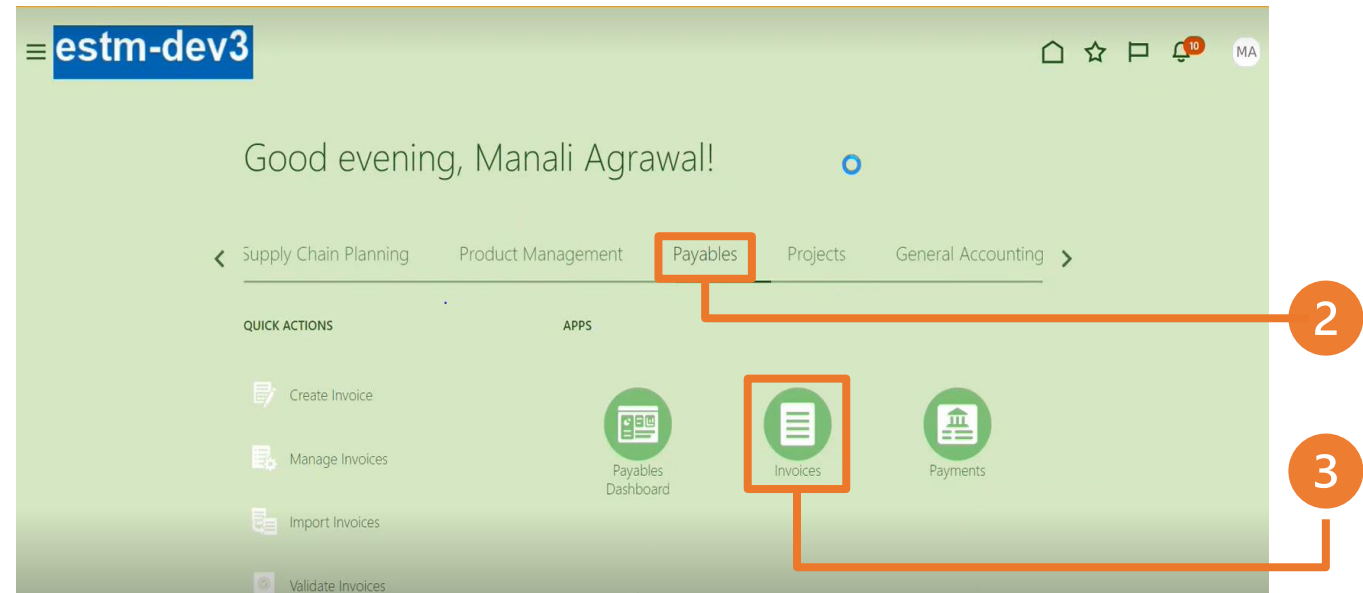


Submitting travel claims

Once the request has been approved, the claim needs to be created in Quantum

To create an invoice to claim travel expenses, you need to:

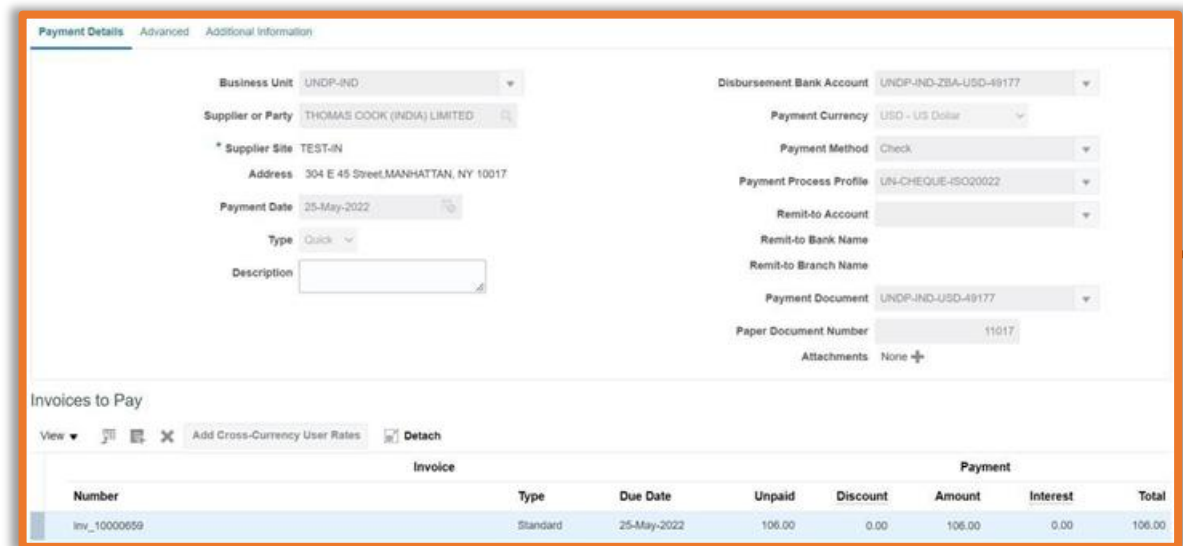
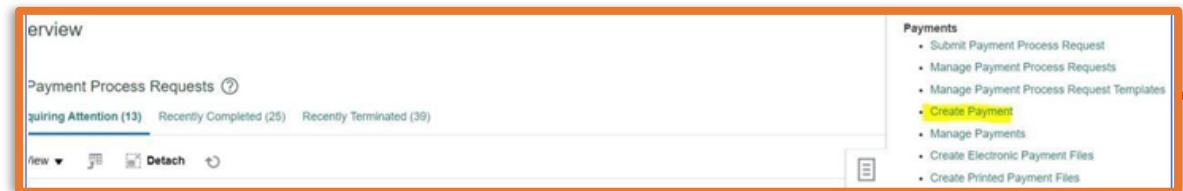
1. Login to the Quantum homepage using the following link:
<http://quantum.partneragencies.org/>
2. Select the payables tab from the Quantum homepage
3. Select the invoices app



Submitting travel claims

You will be redirected to another page, from here:

1. Open the task list and select create payment
2. Enter the payment and invoice details and select save and close



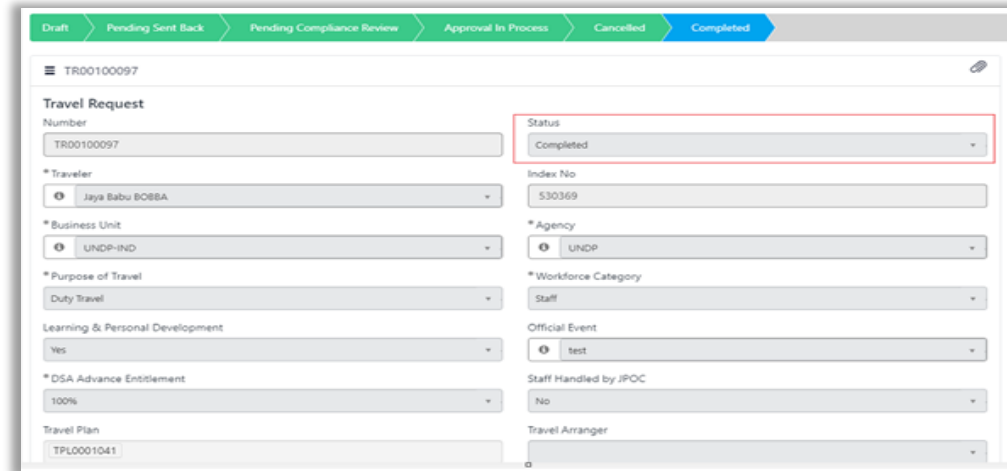
Submitting travel claims: approvals process

Issuance of tickets will be followed by the approval of the submitted purchase order

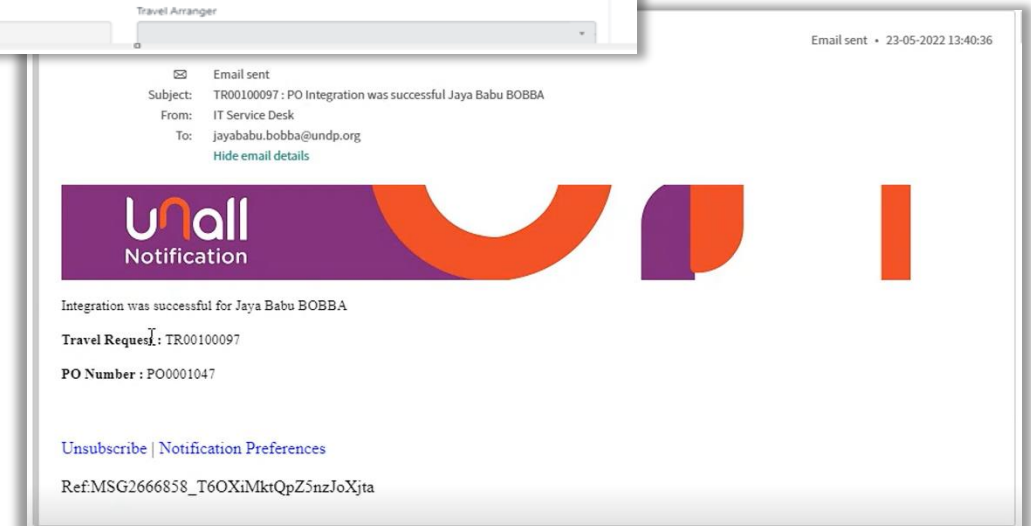
After the transaction of an invoice is successful, the invoice paid status will change to paid and the travel request status changes to complete.

In addition, an automatic email will go from UNall to:

- The initiator of the request
- The travel agency confirming that the purchase order has been approved and that they can go ahead and issue the ticket.



The screenshot shows a 'Travel Request' form for TR00100097. The status is 'Completed', which is highlighted with a red box. The form includes fields for Traveler (Jaya Babu BOBBA), Business Unit (UNDP-IND), Purpose of Travel (Duty Travel), Learning & Personal Development (Yes), DSA Advance Entitlement (100%), and Travel Plan (TPL0001041). Other fields include Index No (530369), Agency (UNDP), Workforce Category (Staff), Official Event (test), Staff Handled by JPOC (No), and Travel Arranger.



QUANTUM



Questions & discussion



QUANTUM

THANK YOU!

