OM153 – Umoja Organizational Management Overview

Umoja Organizational Management Overview – Version 8
Last Modified: 13-Dec-2017

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Course Overview

The purpose of the **Umoja Organizational Management Overview** is to explain the different processes included in Organizational Management while introducing the users to Master Data and to present how these processes are changing with the implementation of Umoja.

Prerequisite Review

You should have completed the following prerequisite courses:

- NA101 – Umoja Overview
- MD102 – Umoja Master Data & Coding Block Overview

Course Duration: 2 hours 30 minutes

Agenda

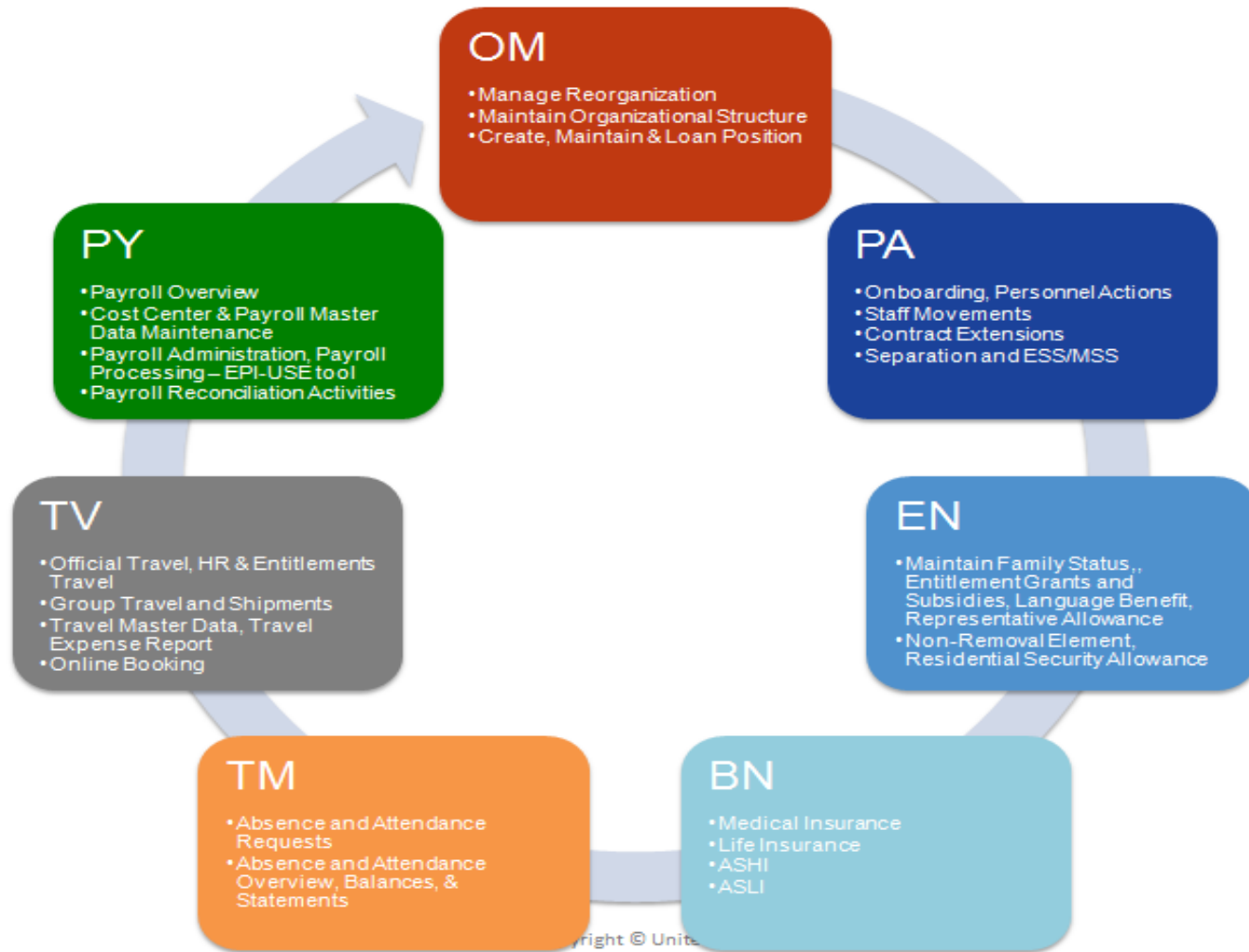| Course Introduction |
| --- |
| Module 1: Umoja Organizational Management Overview |
| Module 2: Organizational Management Master Data |
| Module 3: Organizational Management processes in Umoja |
| Module 4: ECC Basic Navigation Display |
| Course Summary |
| Course Assessment |
| Course Survey |

Course Objectives

After completing this course, you will be able to:

- Explain high-level organizational impacts of Organizational Management responsibilities

- Identify the different types of Master Data relevant for Organizational Management

- Describe the end-to-end Organizational Management processes

HCM High Level Process Flow Diagram

OM
- Manage Reorganization
- Maintain Organizational Structure
- Create, Maintain & Loan Position

PA
- Onboarding, Personnel Actions
- Staff Movements
- Contract Extensions
- Separation and ESS/MSS

EN
- Maintain Family Status,, Entitlement Grants and Subsidies, Language Benefit, Representative Allowance
- Non-Removal Element, Residential Security Allowance

BN
- Medical Insurance
- Life Insurance
- ASHI
- ASLI

TM
- Absence and Attendance Requests
- Absence and Attendance Overview, Balances, & Statements

TV
- Official Travel, HR & Entitlements Travel
- Group Travel and Shipments
- Travel Master Data, Travel Expense Report
- Online Booking

PY
- Payroll Overview
- Cost Center & Payroll Master Data Maintenance
- Payroll Administration, Payroll Processing – EPI-USE tool
- Payroll Reconciliation Activities

Agenda

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Module 1 Objectives

After completing this module, you will be able to:

- Describe the impact of Umoja in Organizational Management processes
- List the key roles and responsibilities in Organizational Management
- Identify key benefits and changes

Key Terminology

Key Term	Description
Organizational Management	Organizational Management defines and captures how the United Nations is structured, how it is staffed and how employees and non-employees are managed and grouped.
Manager	An individual who is in charge of a certain group of tasks, or a certain subset of an organization. A manager often has a number of people who report to him/her. Managers may have budget authority to initiate certain organizational processes.
Organizational Unit	An organizational unit represents a group of positions within the United Nations. Organizational units are hierarchical, building an organizational structure that represents how the organization and individuals report to each other.
Organizational Structure	Representation of the reporting structure and the distribution of tasks using organizational units .
Reorganization	Medium and large scale organizational changes that involve multiple departments and missions with impact in the budgetary and finance structures.

Key Terminology

Key Term	Description
Cost Distribution / Cost Assignment	The coding block elements of a position, recording in the Cost Distribution infotype. In addition, Umoja HR uses a 'master cost center' concept for administrative purposes for workflows and reporting only, which has no financial implication.
Personnel Area & Personnel Subarea	Umoja will use the Personnel Area to identify each country where the UN Secretariat has operations. Personnel Subarea will be used to identify each duty station within a particular country.
Employee Group & Employee Subgroup	Umoja will use the Employee Group to identify at a high level, the main type of relationship a person has with the organization, especially as the relationship with the organization changes. For example, a UN Police non-staff member is hired to become a Professional staff member, his Employee Group would change. Employee Subgroup will further breakdown and identify, within the Employee Group, the different types of relationship and/or status of employment a person has in the organization.

Key Terminology

Key Term	Description
Active budget period	The interval of time into which the project period is divided for budgetary and funding purposes. 12 months for Peacekeeping Budget and 24 months for Regular Budget.
Staffing table	A collection of org units, associated positions and incumbents (both staff and non-staff) in a hierarchical structure. The staffing table provides detailed information of each org unit, position, staff members, certain non-staff and the corresponding statuses.
Position	A position in the system represents: • Where a person works organizationally (who they report to). • How they roll-up into the overall organization structure. • Where they work geographically (duty station & country). • The type of position (mostly related to the funding source and rule - established post, temporary post, non-post etc). • Classification and category of a position • Funding information A position exists independently of the holder (incumbent) of the position and represents the organizational need for a resource.

Key Terminology

Key Term	Description
Post	Posts are staff positions approved through "staffing table authorizations" approved as part of a budgetary process and, in most cases, by a legislative body.
Job code	Job codes identify a job description. In Umoja, each position has a job code that defines its job description.
Loan positions	Changes in the organizational structure is made when a movement is in contradiction with the approved staffing table and the movement is temporary in nature. Loan Positions process has a number of variations depending on the type of loan (reimbursable versus non-reimbursable) and the type of movement (within a department or across departments).
Master Data	This term refers to data stored and managed centrally for the entire organization which is key to the business and used over several functional areas. In Organizational Management, the Master Data main elements include objects and infotypes.

Key Terminology

Key Term	Description
ESS	Stands for Employee Self-Service. Self-service is the front end tool used to provide access to end-users that need role and process-based access to the system. Self-service technology is web-based, allowing a large number of users to access the system without the installation or technology requirements to support the client software used by power and super users in the system.
MSS	Stands for Manager Self-Service, the self-service where end users with manager role can access to information and perform routine tasks that will automatically trigger actions into the back-end system or send notifications.
Umoja ECC	It is the main Umoja back-end system comprising various modules. ECC stands for Enterprise Central Component.

Key Terminology

Key Term	Description
Workflow	Sequence of automated operations that an event will take. A workflow step can be directed towards a specific user or transfer to a manager . Workflow consists of either approvals or notifications. Approvals will pause the event work flow until the time in which the Manager approves or rejects that specific operation. Notification, if chosen for the activity, will send an email to the person(s) involved, and then the event will move to the next step in the workflow.

Roles & Responsibilities

The following Umoja Enterprise roles are involved in the Organization Management processes:

OM Administrator

- Creates and maintains Org Units not associated with budgetary control objects
- Moves Org Units within Budgetary Control
- Creates and maintains non-Post positions
- Moves positions within Budgetary Control
- Changes position titles for Loan Position
- Loans positions within a department (administrative loan)

Budget Administrator

- Budget Administrator creates and maintains all OM elements which are approved through a Staffing Table
- Creates and maintains all org units, normally those associated with Budgetary Control
- Creates, extends or changes position and position's funding information (usually post-type positions)
- Loans (Non-reimbursable and reimbursable) positions between departments and between different countries.
- Creates snapshots of org structures and store in 'approved budget plan'

Roles & Responsibilities

Super Budget Administrator

- Super Budget Administrator is the budget administrator in Organizational Management without any structural authorization restriction.
- Oversees all transactions in OM and provide support to other roles when necessary.

Job Specialist

- Oversees and maintains Job objects and Position Titles
- Position classification (offline ONLY)

OM Reports User

- Executes Organizational Management reports through Business Intelligence, Umoja Web Portal and ECC.

OM Display only

- Can only display Organizational Management's data:
  - All details of Org Units, Positions and Jobs
  - Relationships between all Org Units, Positions, Jobs and Persons
  - Limited details encumbering Persons (staff and non-staff)

Roles & Responsibilities

The following Umoja Enterprise roles are involved in the Organization Management processes as supporting roles:

Manager with Budget Authority	• Maintains organizational units, including expire/delimit options via MSS • Initiates Create Position (non-post) process • Has MSS Team View
Manager	• Has MSS Team View
Certifying Officer	• Approves funding in Create Position (non-post) process • Processes Create Position 'On behalf of' when managers have no access to MSS
HR Partner	• Identifies and processes relevant transactions for incumbent staff member impacted by the reorganization

Roles & Responsibilities Clarification

The Umoja Organizational Management roles described above integrate all the technical functionalities that can be performed in the system.

However, in terms of day-to-day operations in missions, take into account the following points:

- OM Administrator role may not be authorized to perform all the technical activities included in the role description, as some of them will be managed and executed by FPD.

- To validate the scope of OM Administrator role or functionality in each mission, check the appropriate SOP's.

Note: In MINUSTAH, OM Administrators will:
- Move positions within Budgetary Control
- Loan positions within a department (administrative loan)

Introduction to Master Data

Every organization runs on data and a set of processes. As the level of information increases over time, data becomes complex and difficult to manage. If data is not stored and maintained properly, it leads to significant losses in productivity across the organization.

Thus, it is extremely critical for the United Nations to create a centralized data source. In Umoja, this centralized data is called Master Data.

Note: The Organizational Management data enables much of the workflow, authorizations and roles associated with Employee Self-Service (ESS) and Manager Self-Service (MSS). Organizational Management Master Data will be explained in detail in the Module 2.

Organizational Management Definition

The Organizational Management processes are self-service processes wherein a manager identifies the need for changes in the organization structure that will affect budget, reporting or data maintenance.

These processes are designed to empower authorized users in UN to be self-sufficient and leverage staff performance. This will expedite the Organizational Management actions and allow managers to focus on strategic activities.

Umoja provides Organizational Management authorized users and administrators the possibility to manage reorganization and maintain organization structure accordingly to real operation needs.

Note: All the transaction codes and detailed steps to complete Organizational Management processes will be addressed in level 3 role-based courses.

Organizational Management in Umoja

Organizational Management is the process by which UN manages its organizational and reporting structure. The Umoja solution covers the following process areas for Organizational Management:

Organizational Structure Management	Central Budget Staff	Jobs

Enterprise Roles

• OM Administrator	• Budget Administrator • Super Budget Administrator	• Job Specialist
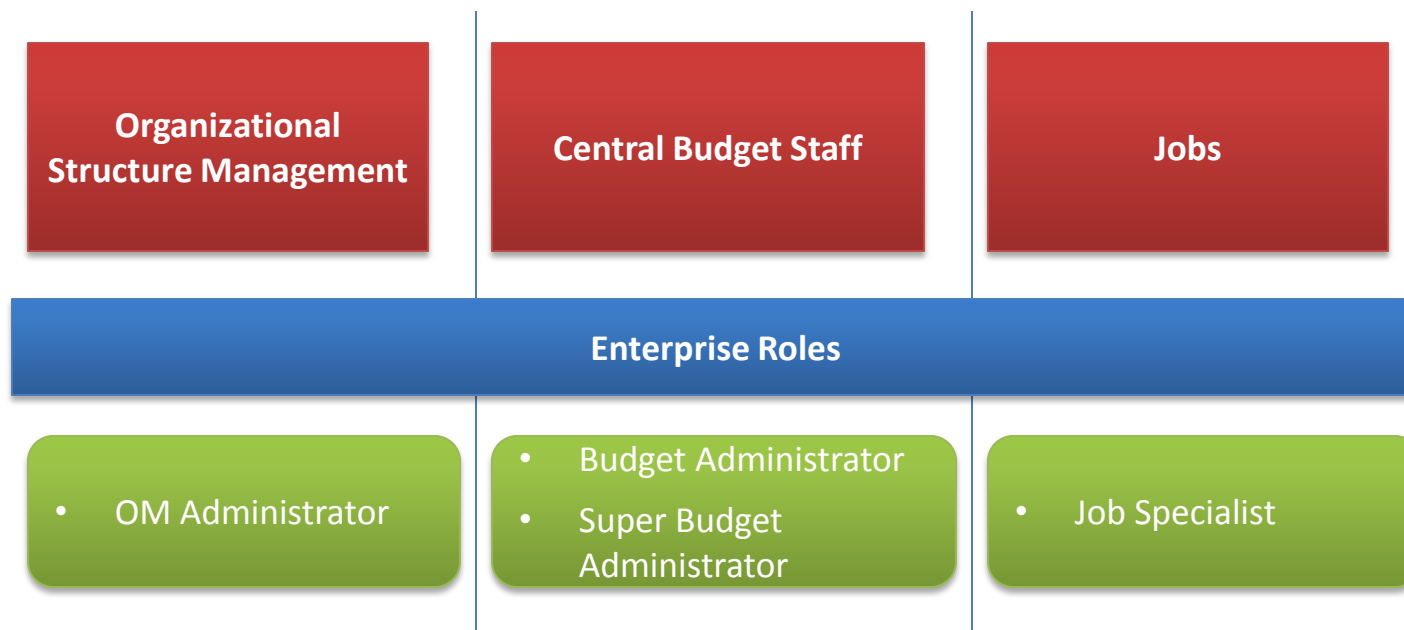
Note: You will learn more about the high-level changes and the Enterprise Roles in each of these process areas in the following modules.

Touch Points

The Umoja system is an integrated system and most of its modules integrate with each other to complete a process. Touch points refer to these integration points across Umoja modules, processes and activities.

Organizational Management

Inspira

- Recruitment
- E-Learning
- Performance
- Job Code

Personnel Administration

- On-boarding
- Temporary Movement
- Contract Extension
- Bulk Contract Extension
- Inter-agency Loans and Secondment
- Maintain HR Master Data

OM Interaction with PA

The Organizational Management process in Umoja consists of a set of activities performed to organizational units and positions, which include multiple process steps that extend across different enterprise roles. The linkage of these processes to Personnel Administration is displayed below.

Organizational Management	Organizational Management	Personnel Administration
Organizational Unit Management	**Position Management**	**Person Management**
• Create Organizational Unit • Maintain Organizational Unit	• Associate position with Organizational Unit, Job and Cost Centers • Loan Position • Extend Position	• Create Person • Maintain Person • Personnel Actions

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Current Challenges & Benefits of Umoja

Challenge	Umoja Solution Benefit
• In IMIS, the number of organizational levels is too limited.	• In Umoja there is no limitation in the number of levels in organizational hierarchy.
• Today, updating organizational structure is a three-step process involving the department/office, OPPBA and OHRM.	• Flexibility during a budget period to carry out structural changes to reflect operational reality without OPPBA approval, when those changes are within the budgetary control flag.
• There is no standard loan process for temporary reassignment of positions inside a department. These are not tracked at all or not properly recorded in the system.	• Umoja enables the system staffing table data for operational use of Managers and HR Partners and tracks the changes between the current structure and the structure officially approved at the beginning of the budget cycle.

Benefits of Organizational Management in Umoja

The Umoja implementation will empower authorized users to be self-sufficient in the Organizational Management processes. The major benefits are listed below:

- Increase the visibility of Organizational Management operations and improve efficiency.

- Streamlined update of the organizational plan according to new requirements.

- Enable intuitive and web-based operations.

- Facilitate the decentralization of personnel management responsibilities to managers.

- Provide an integrated environment across the Secretariat.

Learning Checkpoint 1

Which of the following are considered Organizational Management sub-processes within the Umoja approach?

Select all that apply.

A.   Budget Implementation

B.   Requisitioning

C.   Create Position

D.   Portfolio Management

E.   Manage Reorganization

Learning Checkpoint 1

Which of the following are considered Organizational Management sub-processes within the Umoja approach?

Select all that apply.

A. **Budget Implementation**

B. Requisitioning

C. **Create Position**

D. Portfolio Management

E. **Manage Reorganization**

Options A, C and E are the correct answers. Requisitioning and Portfolio Management processes are not included in Human Resources scope.

Learning Checkpoint 2

Which of the following Enterprise Roles oversees all transactions in Organizational Management without any structural authorization restriction in Umoja ECC?

Select the correct option.

A. Job Specialist

B. Super Budget Administrator

C. OM Administrator

D. HR Partner

Learning Checkpoint 2

Which of the following Enterprise Roles oversees all transactions in Organizational Management without any structural authorization restriction in Umoja ECC?

Select the correct option.

A.   Job Specialist

B.   Super Budget Administrator

C.   OM Administrator

D.   HR Partner

Option B is the correct answer. The Job Specialist creates and maintains jobs, the OM Administrator manages the structure with high authorization restrictions while the HR Partner perform activities related to Personnel Administration.

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Module 1 Summary

The key points covered in this module are:

- Description of the impact of Umoja in Organizational Management processes
- List of key roles and responsibilities in Organizational Management
- Identification of key benefits and changes

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Module 2 Objectives

After completing this module, you will be able to:

- List the elements that constitute the Organizational Management master data
- Explain hierarchical structures based on objects
- Describe Organizational Management main objects and infotypes

Key Terminology

Key Term	Description
Object	Individual representation of each element in the organization. All object characteristics are maintained in infotypes and are linked together using different relationships to form a network that has the flexibility to perform Human Resources planning, forecasting and reporting.
Organizational Unit (O)	An Organizational Unit represents functional grouping such as departments, divisions, or missions of the UN. Several Organizational Units link to one another form the hierarchy of the overall organizational structure.
Position (S)	In Organizational Management, a position is a specific "slot" within the organization that a person is assigned to. Each position is unique and is assigned to an organizational unit. All the position characteristics are stored in a series of infotypes.

Key Terminology

Key Term	Description
Job (C)	Jobs are classifications of functions in an organization (secretary, for example), which are defined by the assignment of tasks and characteristics. Job objects serve as job descriptions that apply to several positions with similar tasks or characteristics. Each Job object represents one job code in Inspira system. Each Job belongs to a Job Family and each Job Family belongs to a Job Network.
Job Family (JF)	Job families group jobs that are related to each other based on similar content of tasks or qualifications. In Umoja ECC technical terms, the Job Family values are identical to Inspira's ones.
Job Network (FN)	Job Network is the higher classification level for jobs. In Umoja ECC technical terms, this object is displayed as 'functional area' and the Job Network values are identical to Inspira's ones.

Key Terminology

Key Term	Description
Person (P)	Persons are objects that hold positions within the organizational structure. Any other additional information for persons is maintained in Personnel Administration.
Cost Center (K)	This is part of the coding block element in FI. This is an external object from Controlling which represents a clear origin of costs. By assigning cost centers to organizational objects, you determine where costs incurred by the object are to be charged.
Budget Control (ZS)	Umoja will use this custom object to distinguish non-budget relevant Organizational Units from the budget relevant/controlled ones. It prevents movement of positions subjected to this control, outside of the current 'staffing table' in which they were approved.
Hierarchical Structure	Hierarchies serve to depict hierarchical relationships between the master data objects of an object type. Hierarchies are based on hierarchy structures and can be created, changed, and deleted in the course of hierarchy maintenance.

Key Terminology

Key Term	Description
Infotype	An infotype is an information unit used to maintain master data related to Umoja. An infotype has data entry fields that are classified as mandatory or optional. When an employee record is updated, old data is automatically time-delimited, and each record is provided with a validity period. Some infotypes may be further categorized to different groups known as subtypes, which are based on themes.

Organizational Management Data Objects: Introduction

Organizational objects are used to create organizational plans in Organizational Management. The data within the Organizational Management module supports many downstream processes and users.

All objects are created and maintained separately and then linked together through relationships. The object attributes and details are maintained in infotypes.
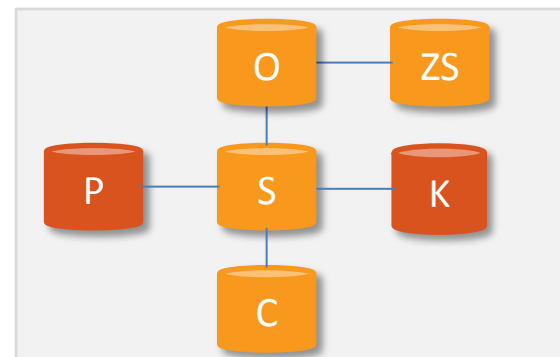
There are Organizational Management and Non Organizational Management object types depending on where they are created and maintained in Organizational Management or in any other Umoja application components and then read into the organizational plan.
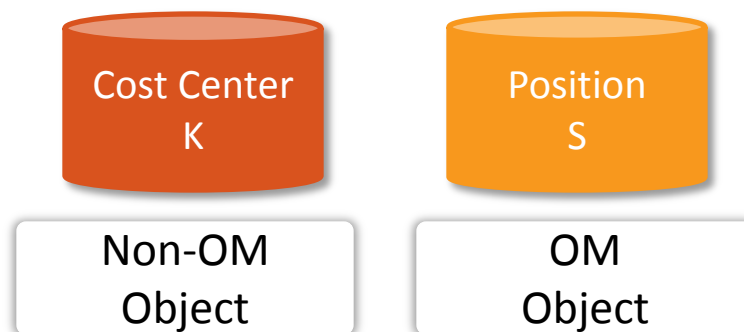
Organizational Management Data Objects

Key components of Organizational Management data objects in Umoja include:

Individual who is assigned to a Position

Units of the organization that perform a function

Flags and control organizational units that are solely for operations purposes

Organizational Unit O

Person P

Budget Control ZS

Master Data Elements

Position S

Job C

Cost Center K

Represents the funding origin of a position

A post where a person is assigned to organizationally

Describes positions with similar tasks or characteristics, and the skills required to perform this work

Legend

OM object

Non-OM Object

Cost Center Object

Within Umoja's HR solution, Cost Center object has two different purposes:

- **Financial cost centers**

  Used as coding block for funding recording, e.g. Infotype 1018 Cost Distribution for positions in Organizational Management.

- **HR Administrative purposes cost centre**

  Also known as master cost centre, it is purely used by HR to identify a particular department or department-equivalent entity with the Organizational Units, departments and persons which belong to it.

  In Umoja's design, each department, mission, office away from headquarter and economic commission is represented by its own master cost centre and associated then to Persons, Positions and Organizational Units objects that can be identified through the linkage with this object.

  This information is displayed in **Infotype 1008** for Organizational Units and Positions; and in **Infotype 0001** for Persons.

Cost Center K

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Organizational Management Main Infotypes

Key components of Organizational Management data objects in Umoja are described by the following infotypes:

Common OM Objects Infotypes

- IT1000 Objects
- IT1001 Relationships
- IT1002 Descriptions
- IT1008 Account assignment features

Organizational Unit (O) Infotype

- IT1082 Organizational Unit types

Job (C) Infotypes

- IT1080 UN Classification

Position (S) Infotypes

- IT1005 Planned Compensation
- IT1007 Vacancy
- IT1013 Employee Group/Subgroup
- IT1014 Obsolete
- IT1018 Cost Distribution
- IT1081 UN Position attributes

Organizational Management Objects Common Infotypes I

Description

IT1000 Objects: Rather than describing the characteristics or attributes of an existing object, the *Object* infotype fulfills one main purpose: It allows the creation of new objects, for example, organizational units, positions or jobs.

1 **Validity period** for the object. The validity period applied to the object automatically limits the validity of any infotype records appended to the object.

2 **Obj abbr. and Object name** fields provide an abbreviation to represent the object and brief description of the object. The abbreviation provided for an object is used to identify it in later work processes.

Note: You can change abbreviations and descriptions by editing object infotype records. However, you cannot change an object's validity period in this manner. This must be done using the delimit options.

Organizational Management Objects Common Infotypes II

Description

IT1001 Relationships: Using the *Relationship* infotype, you can define the relationships between the different objects you use. Defining and maintaining relationship infotype records is an essential part of setting up information in Organizational Management. Without relationships, only isolated pieces of information exist.

1 **Relationship type:** There are many types of possible relationships between different objects. Certain relationships apply only to certain objects.

2 **Type of related object and ID of related object:** Identifies the second object involved in a relationship, by indicating what type of object it is and an eight-digit number codification that represents it.

Organizational unit	TrainingOU	Traning Org Unit
Planning Status	Active	
Valid from	01.05.2014 to 31.12.2014	Change Information

Relationships   01 O 20010281 1

| Relationship type/relationship | A 002 | Rep... (line) to | **1** |

Related Object

Type of related object	O Organizational unit	**2**
ID of related object	20010280	
Abbreviation	Test_Alex3	
Name	Test Alex Haiti - Port Paix	

Priority

Record 1 of 8

Organizational Management Objects Common Infotypes III

Description

IT1002 Description: Using this the *Description* infotype, you can append long text descriptions to the different objects you work with in Organizational Management.

1 **Description:** Free text box to add any comment concerning to the object.

Note: Do not use this infotype as a means of entering job or position descriptions.
Job and position descriptions consist of a list of tasks the holder of a job or position must perform. Such descriptions are established by creating:
- Jobs, positions and tasks
- Relationship infotype records between these three objects

Organizational unit	TrainingOU Traning Org Unit
Planning Status	Active
Validity	01.05.2014 to 31.12.2014 Change Information

Description   01 O 200102281 1
Subtype   0001 Full Name
Language   EN English
Description

Organizational Unit created for training purposes

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Record 1 of 3

Organizational Management Objects Infotypes IV

Description

IT1008 Account assignment features : The Account Assignment Features infotype applies to organizational units and positions, and serves two purposes:

This provides Personnel Area (country) and Personnel Subarea (duty station) where an Org Unit or a position is located. When an Org Unit or Position does not have this infotype, it will inherit from its parent org unit.

1 The following **Enterprise Structure** fields will be pre-populated in the infotype:

- **Company code:** all UN personnel areas are linked to the country grouping UN.
- **Business Area:** represents a separate area of operations or responsibilities within an organization In Umoja's HCM design, this is defaulted to U999.

Organizational unit	TrainingOU	Traning Org Unit
Planning Status	Active	
Valid from Business Area	U999)14	to 31.12.2014

Change Information

Acct. Assignment Features 01 O 20010281 1

1

Company Code	1000	United Nations
Business Area	U999	Umoja SAP Tech. Config.
Personnel area	HT00	Republic of Haiti
Pers. subarea	HT00	Port-au-Prince
CO Area	1000	United Nations CO Area

Record 1 of 2

- **Personnel area:** will identify each country where the UN Secretariat has operations.
- **Pers. Subarea:** contains each duty station within a particular country.

Organizational Units Infotype

IT1082 Organizational Unit types: Contains Organizational Unit object (O) information relevant for reporting purposes.

The following fields will be completed:

1 Organizational Unit Type: Select from the dropdown list between the various office types and office levels in the organization

2 Org Unit Class: Choose between N/A, Information Technology or Evaluation from the drop down list.

Organizational unit	TrainingOU Traning Org Unit
Planning Status	Active
Validity	01.05.2014 to 31.12.2014 Change Information

UN Org Unit Type   01 O 20010281 1

Organizational Unit Type   11 Department / Office   **1**

Record 1 of 2

Org Unit Class

Org Unit Class   01   Information Technology   **2**

Remarks

Position Infotypes I

IT1005 Planned Compensation: This infotype uses the salary and pay scale structures to create planned compensation data at the position level.

1 The following fields must be entered:

- **Country Grouping:** A unique indicator for a country. Umoja solution is always "UN Non-Profit Organization" or "NPO".

- **Pscale type:** Type/category of pay scale, e.g. P and above, GS, FS, etc.

- **PS Area:** Where the pay scale is applicable for (worldwide, a particular country, a particular duty station, etc.)

- **ESG for CAP:** A payroll specific grouping. This combines subgroups which are governed by the same valid collective agreement provisions in payroll calculations.

- **Pay Scale Group:** This is the category-grade of a position.

Position	Associate Hu	Associate Human Rights Officer
Planning Status	Active	
Validity	01.08.2013 To 31.12.9999	Change Information

Planned Compensation   01 S 31000232 1

PScle

Pay Scale Structure Data

Country Grouping	UN Non-Profit Organi... ▼	
P.scale type	P+	Professional & Above
PS Area	WW	Worldwide
ESG for CAP	1	
Pay Scale Group	P-2	

Key Date for Display	03.04.2014

Currency key	USD	United States Dollar
Time unit	1 Monthly ▼	

Record 1 of 1

Position Infotypes II

Description

IT1007 Vacancy: The Vacancy infotype allows you to identify position's HR vacant status. You might want to create an HR vacant record for an occupied position, for example, when the position is only occupied by a staff member who is on a temporary appointment and the position is not blocked/lien by any staff member.

① Mark **Open** or **Vacancy filled** (HR Vacant status) option as appropriate.

② The flag **JO Notification** can be used to mark a position which requires job notification to be created in Inspira (for reporting only).

Position	Associate Hu	Associate Human Rights Officer
Planning Status	Active	
Valid from	01.08.2013 to 31.12.9999	Change Information

Vacancy   01 S 31000232 1

● Open
○ Vacancy filled   ①

Record 1 of 1

JO Notification
JO Notification ☐   ②

Remarks

Position Infotypes III

IT1013 Employee Group/Subgroup: Using the *Employee Group/Subgroup* infotype, you can assign a position to an employee group and employee subgroup to identify the different types of positions related to the UN Secretariat.

1 The following fields need to be completed:

- **Employee group:** The Employee Group assigned to a position generally is based on the nature of his/her employment or relationship with the organization. Umoja will use the Employee Group to identify at a high level, the main type of relationship a person has with the organization

- **EE subgroup:** Further breakdown within the Employee Group to differentiate types of relationship and/or status of employment a person has with the organization.
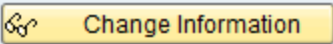
Position	Associate Hu	Associate Human Rights Officer
Planning Status	Active	
Valid from	01.08.2013 to 31.12.9999	Change Information

Employee Group/Subgroup 01 S 31000232 1

| Employee group | 1 International Staff | International Staff | **1** |
| EE subgroup | PR Professional & Above | | |

Record 1 of 1

Position Infotypes IV

IT1014 Obsolete: In Umoja's design, a position is marked as obsolete when it is frozen. This position is then not allowed to have any new hiring or incumbent.

1 Position is obsolete in the system when the flag **Obsolete** is checked.

Position	Associate Hu	Associate Human Rights Officer
Planning Status	Active	
Valid from	03.04.2014 to 31.12.9999	Change Information

Obsolete   01 S 31000232 1

☐ Obsolete   **1**

Position Infotypes V

Description

IT1018 Cost Distribution: This infotype contains cost related position information. It can be used to determines how costs are to be distributed between several cost centers.

Position Infotypes VI

Description

IT1081 UN Position attributes: Contains Position object (S) additional information relevant for reporting purposes.

1 **Position type** field can be selected from the drop-down menu, choosing among the following options.

Pos. Ty...	Position Type
11	Established Post
12	Temporary Post
13	GTA Finite Duration
14	GTA Finite PK
21	GTA Replacement
22	TAM
23	VC Project Position
24	VC Post
31	RL "Reimbursable Loan"
32	NRL "Non Reimbusrable Loan"
33	Billing Position
41	Non-staff Through Payroll
42	Non-staff Not Through Payroll
98	Planned
99	Admin Purposes - No Funding

2 **Nature:** field to identify specific nature of a position which may have certain restrictions for recruitment purposes or may have some specific entitlements for the incumbent.

Position	Associate Hu	Associate Human Rights Officer
Planning Status	Active	
Validity	01.08.2013 to 31.12.9999	Change Information

UN Position Attributes   01 S 31000232 1

Appr. Position Duration		to	

NBCS Case Number

Fund ID	0	Generic
Position Type	11	Established Post	**1**

Record 1 of 1

UN Position Nature

Nature **2**

Pos. Natu.	Description
01	Language
02	Geographical
05	Interagency-Secr.
06	Interagency-Other
10	Other

Remarks

Position Types

The UN differentiates staff positions in to the following categories:

- **Post Positions:** staff positions approved through "staffing table authorizations". They are approved as a part of a budgetary process and, in most cases, by a legislative body.

- **Non-post positions:** all other staff positions created by the program managers (or executive offices and administrative offices on their behalf) from a budget line approved only as "an amount".

> **Note**: Please note **Position types** available in Umoja have changed from legacy systems.
>
> Positions will be explained in detailed in 3134 OM for OM Administrators & 3135 OM for Central Budget Staff courses.

Pos. Ty...	Position Type
11	Established Post
12	Temporary Post
13	GTA Finite Duration
14	GTA Finite PK
21	GTA Replacement
22	TAM
23	VC Project Position
24	VC Post
31	RL "Reimbursable Loan"
32	NRL "Non Reimbusrable Loan"
33	Billing Position
41	Non-staff Through Payroll
42	Non-staff Not Through Payroll
98	Planned
99	Admin Purposes - No Funding

Job Infotypes

Description

IT1080 UN Classification: This infotype contains additional information associated with the Job object (C).

1 The following fields can be completed, either by typing or searching through the match code:

- **Functional Code:** Enter the Organizational Common Classification Group (OCCG) functional code.

- **ICSC CCOG Code:** Enter the Common Classification of Occupational Groups (CCOG) code, which are provided by International Civil Service Commission (ICSC).

Note: The system performs validations between ICSC CCOG Code and Code blocks to ensure consistency.

Job	Accountant	Accountant
Planning Status	Active	
Validity	01.02.2014 to 30.09.2014	Change Information

UN Classification 01 C 70001012 1

Classification

Classified ☑ Classified Date 11.11.2009

Li 1, Co 1   Ln 1 - Ln 1 of 1 lines

Functional Code

Functional Code	FIN	
ICSC CCOG Code	1A01a	Accountants - general

1

Record 1 of 1

Organizational Management Structure

Together, several organizational units and their hierarchical relationship form an organizational structure.
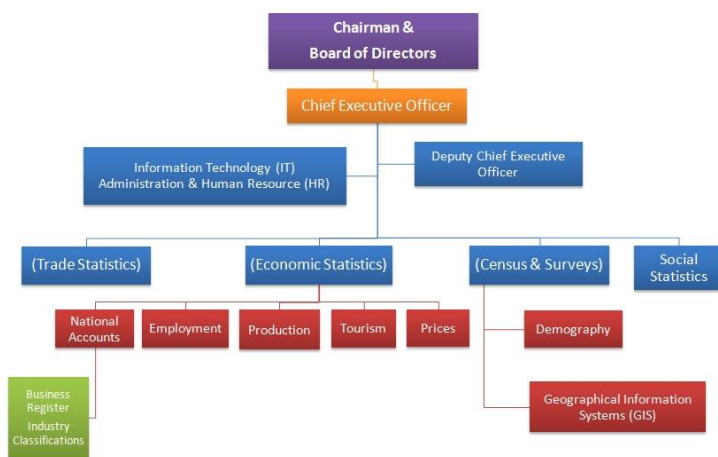
There are different types of relationships because the type of connections between the objects varies depending on the position they hold in the structure.

Inheritance is a fundamental concept in Organizational Management. This is when an object automatically receives the attributes assigned to another object through a relationship. Lower level objects always inherit the attributes of higher level objects, unless specified otherwise.

Note: When creating a relationship, the inverse relationship is usually automatically created by the system. Thus, relationships are reciprocal in the sense they have two perspectives or corresponding sides.

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Organizational Management Relationship

Object relationships reflect the use of organizational objects and thereby , give them significance. In Umoja, Organizational Management objects are linked as follows:
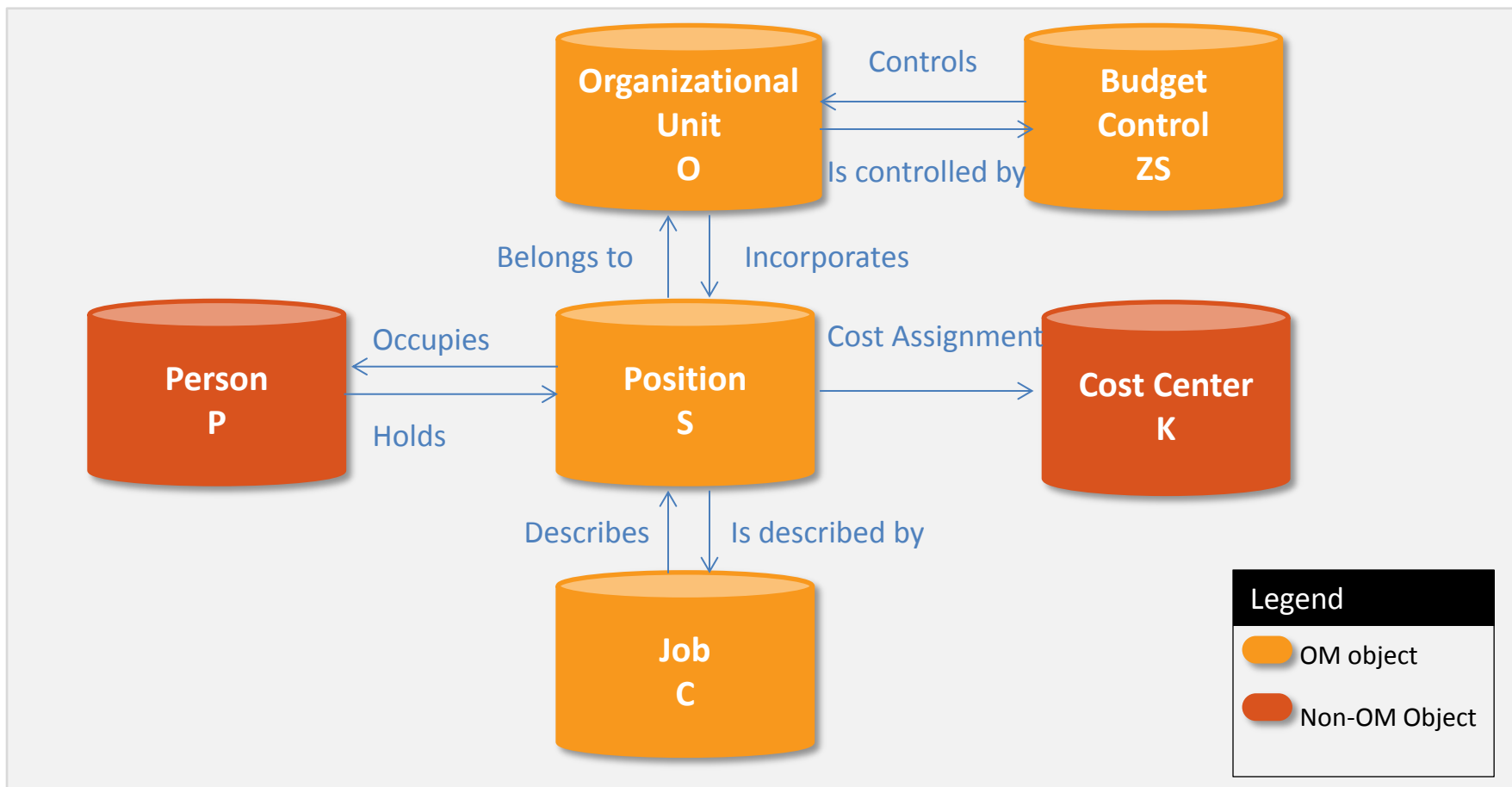
Umoja ECC Organizational Management Relationships

Objects	Code	Description	Object	Business Explanation
Org Unit (O)/Position (S)/Job (C)	A003	Belongs to	Org Unit (O)	Record the parent Org Unit for an Org Unit, Position or a Job
Org Unit (O)	B003	Incorporates	Org Unit (O)/Position(S)/Job (C)	Record the parent Org Unit for an Org Unit, Position or a Job
Position (S)	A008	Holder	Person (P)	The incumbent of a Position
Person (P)	B008	Holder	Position (S)	A Person who is encumbering a Position
Job (C)	A450	Belongs to	Job Family (JF)	Job and Job Family association
Job Family (JF)	B450	Contains	Job (C)	Job and Job Family association
Job Family (JF)	A450	Belongs to	Functional Area (FN) – aka Job Network	Job Family and Job Network association
Functional Area (FN) – aka Job Network	B450	Contains	Job Family (JF)	Job Family and Job Network association
Person (P)	A990	Is Recruited for	Position (S)	When management offer is made to an applicant in Inspira, this is how a Position is earmarked for the applicant in Umoja

Umoja ECC Organizational Management Relationships

Objects	Code	Description	Object	Business Explanation
Position (S)	B990	Recruitment Planned for	Person (P)	When management offer is made to an applicant in Inspira, this is how a Position is earmarked for the applicant in Umoja
Org Unit (O)	A992	Is R Loaned to	Position (S)	The parent Org Unit from where the position was R Loaned.
Position (S)	B992	Is R Loaned from	Org Unit (O)	A992 Reciprocal
Org Unit (O)	A993	Is NR Loaned to	Position (S)	The parent Org Unit from where the position was NR Loaned.
Position (S)	B993	Is NR Loaned from	Org Unit (O)	A993 Reciprocal
Person (P)	B994	Is Blocked by	Position (S)	When a s/m is on temporary assignment, long-term SLWOP, interagency loan or interagency secondment – the Person has a lien to this Position

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Umoja ECC Organizational Management Relationships

Objects	Code	Description	Object	Business Explanation
Position (S)	A994	Blocks	Person (P)	The position is blocked by the lien person
Person (P)	B998	Will return to	Position (S)	To record the lien person when will s/he be expected to return to this Position
Position (S)	A998	Will be held by	Person (P)	To record the lien person when will s/he be expected to return to this Position
ZS (Budget Control)	A995	Budget Control	Org Unit (O)	To record an org unit is under budgetary control (administrated by OPPBA in this case)
Org Unit (O)	B995	Is Controlled by	ZS (Budget Control)	To record an org unit is under budgetary control (administrated by OPPBA in this case)

Enterprise Structure & Personnel Structure Data

Master Data enables all UN data across specific functional areas to be housed in one place and to be accessed from anywhere in the world. Each process area utilizes a different combination of Master Data elements.

The Enterprise Structure is used not only to group people depending on payroll, time and benefit rules, but also is also heavily relied upon to support security and reporting requirements.

In the other hand, Personnel Structure is used to classify people in general terms and it is used to default values to other data elements, such as payroll schedule, work schedule, compensation structure, benefits eligibility, etc.

The Organizational Management processes use the following Enterprise Structure & Personnel Structure data elements to execute transactions and maintain source data:

Personnel Area   **Personnel Subarea**   **Employee Group**   **Employee Subgroup**

Enterprise Structure: Personnel Area

Personnel Area	Personnel Subarea	Employee Group	Employee Subgroup
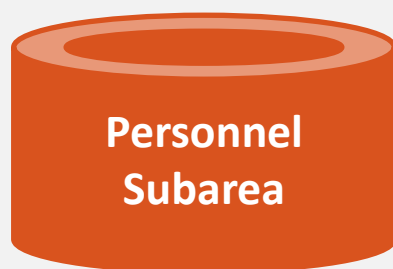
The Personnel Area is an organizational unit; according to a personnel administrative, time management and payroll organizational point of view, a personnel area represents a delimited enterprise area. The personnel area is only maintained in *Personnel Administration*.

A personnel area is assigned to a company code which has financial accounting values that are relevant for the personnel area. When the personnel area is assigned to a company code, the personnel area inherits the currency from that company code. This is the default currency that will be used to display and enter the person's salary and compensation related data. This is also the default currency used for payroll.

Personnel areas are sub-divided into personnel subareas.

Enterprise Structure: Personnel Subarea

Personnel Area	**Personnel Subarea**	Employee Group	Employee Subgroup
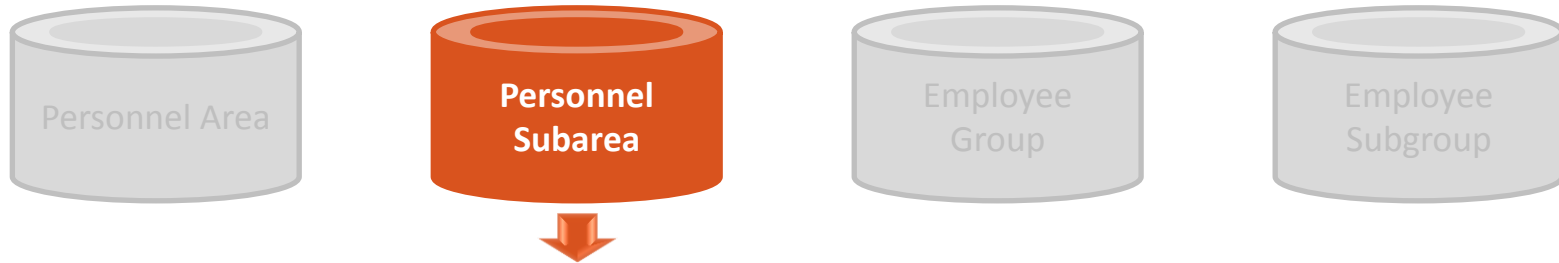
A personnel subarea is an Umoja specific unit and is a subdivision the of the personnel area. A pay scale area, a pay scale type and a public holiday calendar are precisely defined for a personnel subarea.

A Personnel Area can also have many Personnel Subareas, and each Personnel Subarea is related to one or more Personnel Areas as shown in the figure below:

Personnel Area 1		Personnel Area 2		Personnel Area 3
Personnel Subarea 1	Personnel Subarea 2	Personnel Subarea 3		Personnel Subarea 4
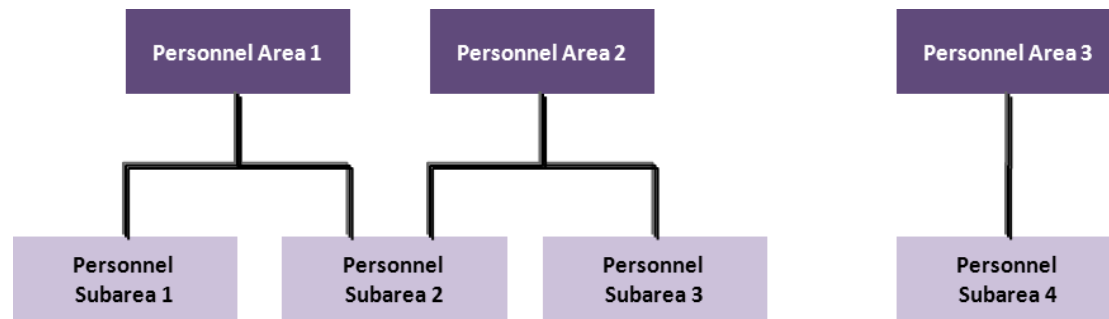
In general, the personnel subarea refers to an area in a workplace, in which a group of people work under similar conditions of employment.

Personnel Structure: Employee Group

Personnel Area	Personnel Subarea	**Employee Group**	Employee Subgroup

The Employee Group defines the type of employee within the organization. The Employee Group assigned to a person is generally based on the nature of his/her employment or relationship with the organization.

It will be used primarily to determine people based on their employment contracts with the organization, often referred to as employees, staff or associates. The Employee Group will also identify the other types of relationships between people and the organization, like contractors, consultants and other types of non-staff.

Examples of UN Employee Groups include:

- International Staff
- Local Staff
- WAE Staff
- Special Staff

Personnel Structure: Employee Subgroup

Personnel Area	Personnel Subarea	Employee Group	**Employee Subgroup**

The Employee Subgroup further refines the Employee Group. The employee subgroup for work schedules allows you to group several employees and base their work schedules on the same rules.

Examples of Employee Subgroups include:

- Field Service
- General Service
- Language Teacher
- Secretary General

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Learning Checkpoint 1

Which of these objects is not maintained in Organizational Management?

Select the correct option.

A. Organizational Unit O

B. Cost Center K

C. Position S

D. Job C

Learning Checkpoint 1

Which of these objects is not maintain in Organizational Management?

Select the correct option.

- A.   Organizational Unit O
- **B.   Cost Center K**
- C.   Position S
- D.   Job C

Option B is the correct answer. Options A, C and D are Organizational Management objects.

Learning Checkpoint 1

Relationships between Organizational Management objects are _____, which means it has two perspectives or corresponding sides.

Fill in the blank with the correct option.

A. Hierarchical

B. Reciprocal

C. Direct

D. Individual

Learning Checkpoint 1

Relationships between Organizational Management objects are _____, which means it has two perspectives or corresponding sides.

Fill in the blank with the correct option.

A.   Hierarchical

B.   Reciprocal

C.   Direct

D.   Individual

Option B is the correct answer. Every single relationship in the Umoja ECC system has a reciprocal one that is created automatically.

Module 2 Summary

The key points covered in this module are:

- Elements that constitute the Organizational Management master data
- Hierarchical structures based in objects
- Description of Organizational Management main objects and infotypes

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Module 3 Objectives

After completing this module, you will be able to:

- Describe how managed reorganization is affected by Organizational Management processes within Umoja

- Explain how Organizational Management interacts with functions both inside and outside of Human Resources Services

Organizational Management in Umoja

The high level Organizational Management process involves the following sub-processes:

Manage Reorganization

Budget Implementation

Maintain Org Structure

Maintain Position

Create Position

Loan Position

Bulk Extension of Position

Manage Reorganization Process

Manage Reorganization	Maintain Org Structure	Create Position	Maintain Position	Loan Position	Bulk Extension of Position	Budget Implementation

Medium and large organizational changes that will affect budget, reporting and organizational structure.

Note: Large reorganizations will occur relatively infrequently and are normally limited to budgetary planning.

Note: Smaller changes and movement of individual positions are covered under Maintain Organizational Structure.

Reorganizations scope include:

- Reorganizations inside a Department or Field Mission
- Reorganization between 2 different Departments or Field Missions

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Maintain Organizational Structure Process

Manage Reorganization	**Maintain Org Structure**	Create Position	Maintain Position	Loan Position	Bulk Extension of Position	Budget Implementation

Allows Managers with Budget Authority to manage small reorganizations within their immediate/direct organization structure with no timing constraints.

Manager with Budget Authority

- Request and consultations with OM Administrator about New/Changes to a Organizational Unit (offline)

OM Administrator

- Initiate, complete and submit creation, change or deletion of organizational units via MSS.
- Review if follow up actions are required.

- Organizational Unit attributes updated automatically in ECC

Note: Either changes within a department/mission but outside budgetary control flag or changes between departments and missions are performed by Budget Administrators in Umoja ECC following a more complex flow. Steps will be detailed in the appropriate level 3 course.

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Create Position Process

Manage Reorganization	Maintain Org Structure	**Create Position**	Maintain Position	Loan Position	Bulk Extension of Position	Budget Implementation

At any time during the year, a Manager with Budget Authority may request that a new position is created for a concrete organizational need, always subject to available funds.

Manager with Budget Authority
- Complete Create New Position Interactive Form in MSS

Certifying Officer
- Check funds availability and approve/reject request

OM Administrator
- Verify & submit Create New Position Interactive Form

- Position created automatically in ECC
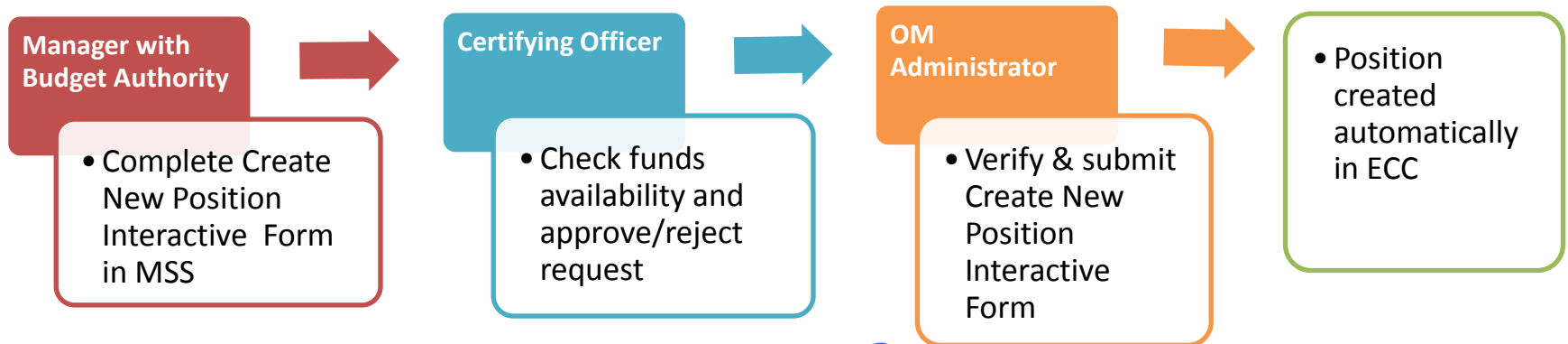
Note: Request can be completed on behalf of the manager when they have no access to self-service by OM Administrators or Certifying Officers.

Note: Post type positions will be created in Umoja ECC by Budget Administrator users following a different process and approval flow.

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Maintain Position Process

| Manage Reorganization | Maintain Org Structure | Create Position | **Maintain Position** | Loan Position | Bulk Extension of Position | Budget Implementation |

This process supports the maintenance of position data and permanent movement of positions under the same Budget Organizational Unit .

Manager with Budget Authority
- Initiate Maintain Position Interactive Form in MSS

OM Administrator
- Review & approve the position change request

HR Partner
- Determine follow up HR activities if any

- Position attributes updated automatically in ECC
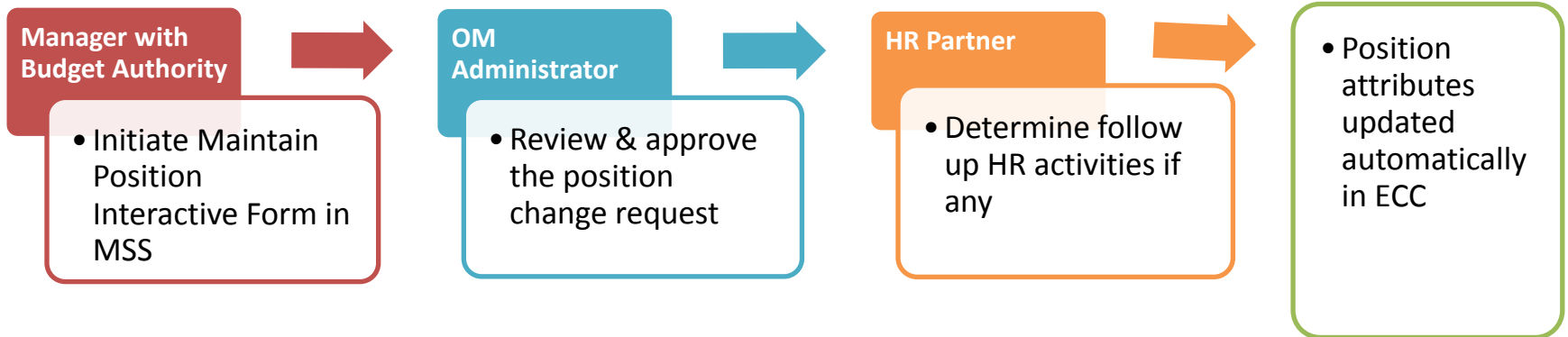
Note: Notifications are sent to the Manager and to the HR Partner responsible for that office, who determines follow up HR activities if any.

Note: Request form can be completed and submitted on behalf of the manager when they have no access to self-service by OM Administrator.

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Loan Position Process

Manage Reorganization	Maintain Org Structure	Create Position	Maintain Position	**Loan Position**	Bulk Extension of Position	Budget Implementation
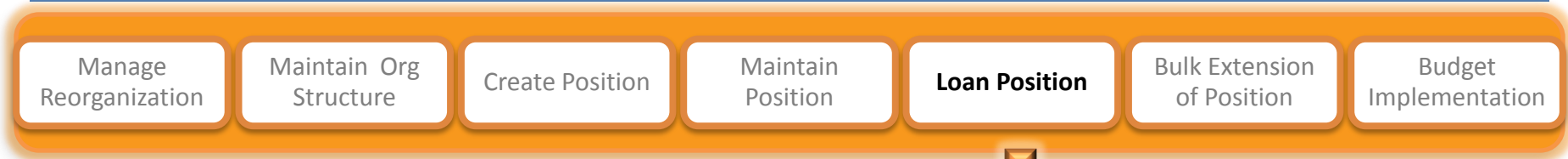
Loans are temporary transfer of positions between different organizational units. Loan position process has a number of variations depending on the type of loan (reimbursable vs. non-reimbursable) and the type of movement (within a department or across departments).

Managers
- Receiving Manager and Releasing Manager agree on the details of loan (offline)

OM Administrator
- Initiate, complete & submit Loan Position request form in MSS

HR Partner
- Determine follow-up HR activities if any.

- System updates the position relationships to implement the loan

- Personnel Actions **PA**
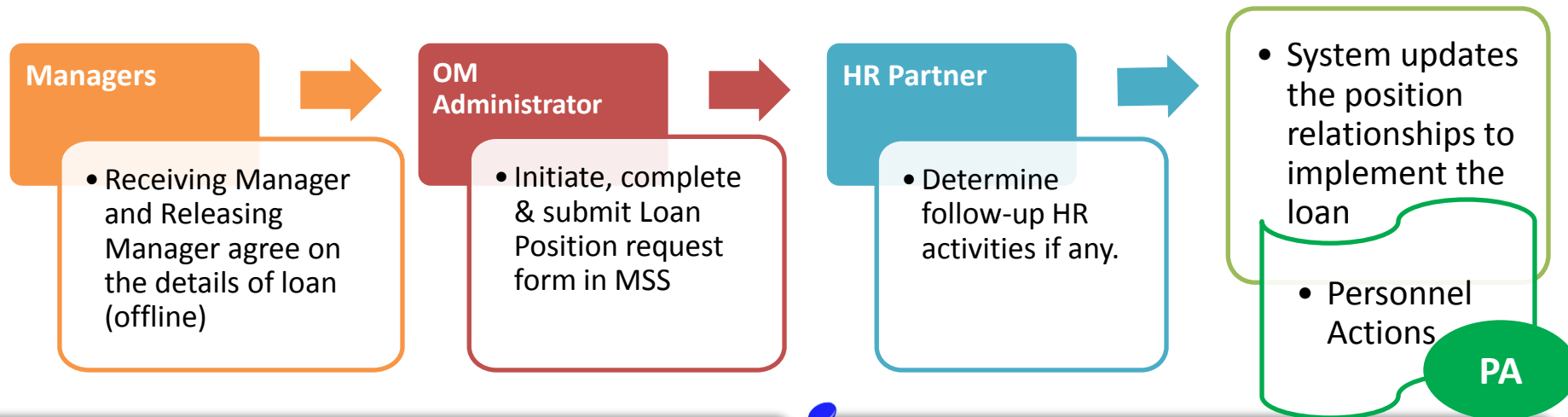
Note: If the loaned position has an incumbent, **Temporary Movement** in **Personnel Administration** is initiated to process all master data changes required.

Note: If the loan is between departments, there will be additional offline consultations involving OPPBA. Budget Administrator will prepare and finalize the loan details in ECC.

Bulk Extension of Position

Manage Reorganization	Maintain Org Structure	Create Position	Maintain Position	Loan Position	**Bulk Extension of Position**	Budget Implementation

This process massively automates the extension of the funding relationship between funds and positions.

Budget/ Super Budget Administrator

- Run position funding extension program through ECC back-end system

- Position funding extended in ECC

Note: This process will be typically completed by a super user at very specific times during the year, linked with budget implementation cycles.

Note: If the extended positions have incumbents, in **Personnel Administration** is initiated the process **Bulk Contract Extension**.

Budget Implementation

Manage Reorganization	Maintain Org Structure	Create Position	Maintain Position	Loan Position	Bulk Extension of Position	**HR Budget Implementation**

Budget Implementation supports the activation of the staffing plan that was submitted as a part of the budget formulation cycle.

Budget Administrator

- Make adjustments to staffing table plan and position info

HR Partner

- Analyze HR steps to support staffing table changes

OM
- Bulk extension of positions

PA
- Personnel Actions

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Learning Checkpoint 1

What is the main purpose of Manage Reorganization process?

Select the correct option.

A. Loan positions between two different departments or Peacekeeping missions.

B. Medium and large organizational changes that will affect budget, reporting and organizational structure.

C. Reorganizing new positions within the existing structure.

D. Small reorganizations within a manager direct organization structure with no budget impact.

Learning Checkpoint 1

What is the main purpose of Manage Reorganization process?

Select the correct option.

A. Loan positions between two different departments or Peacekeeping missions.

B. **Medium and large organizational changes that will affect budget, reporting and organizational structure.**

C. Reorganizing new positions within the existing structure.

D. Small reorganizations within a manager direct organization structure with no budget impact.

Option B is the correct option. Options A, C and D are incorrect answers since they describe other Organizational Management processes.

Learning Checkpoint 3

Reorganizations between departments and missions can be performed by OM Administrators in Umoja.

Select the correct option.

A.   True

B.   False

Learning Checkpoint 3

Reorganizations between departments and missions can be performed by OM Administrators in Umoja.

Select the correct option.

A.   True

B.   False

Option B is the correct answer. Reorganizations between departments and missions can only be performed by Budget Administrators in Umoja ECC.

Module 3 Summary

The key points covered in this module are:

- Description of how manage reorganization is affected by Organizational Management processes within Umoja

- Explanation of how Organizational Management interacts with functions both inside and outside of Human Resources Services

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Module 4 Objectives

After completing this module, you will be able to:

- Identify the main transactional codes for Organizational Management

- Describe how to display all positions and persons within an org unit

- Describe the steps and screens to maintain all Organizational Management object

- Describe the steps and screens to create and maintain integrally any Organizational Management objects

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ECC Display for Organizational Management

The main display Umoja ECC transactional codes used across the Organizational Management process are:

PPOSE

PP01 Display
- PO10D
- PO13D

PPOSE – Getting there

PPOSE

The Umoja ECC transaction code PPOSE is used to view all people and positions within an organizational unit.

1 Once in Umoja ECC, to access the transaction just type **PPOSE** in the main menu **Command** field and press **ENTER** button in your keyboard.
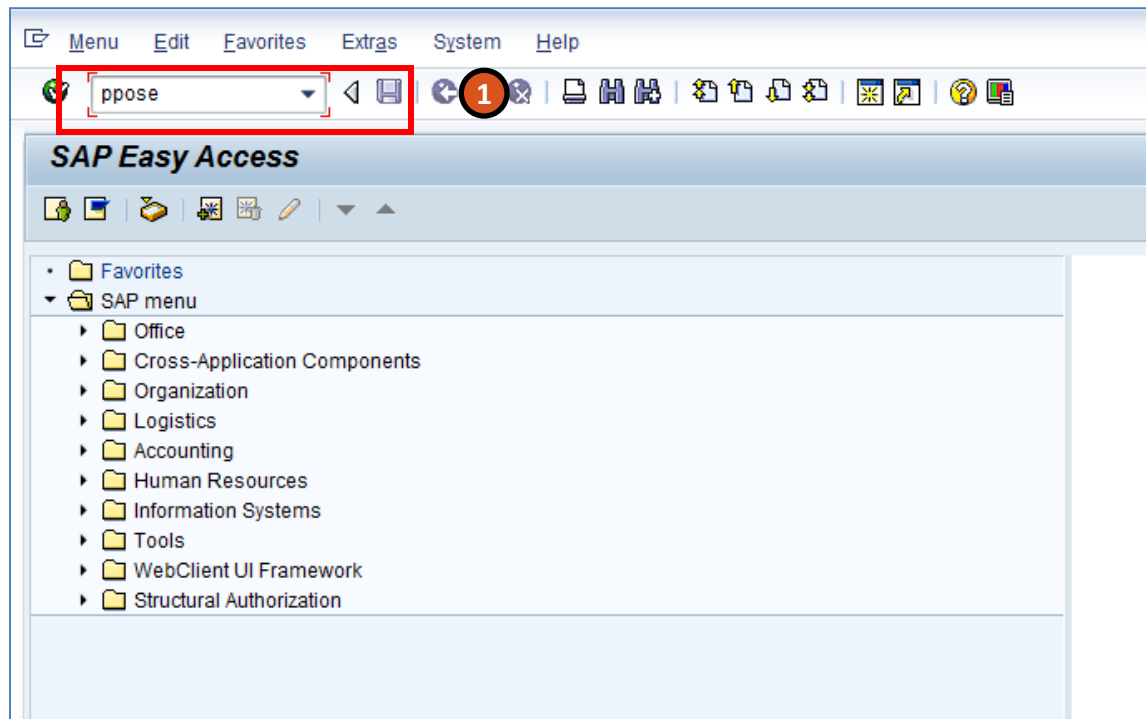
PPOSE Display

The PPOSE screen is displayed. There are four different parts, described as follows:

(A) **Find by:** Search menu situated in the upper left side of the screen

(B) **Hit list:** This section shows the search results in the lower left side of the screen

(C) **Organization and staffing display:** Situated in the upper right side of the screen, contains structure for the entry selected in **(B)**

(D) **Details:** For any line selected in screen **(C)** lower right side of the screen shows the most relevant information, grouped into different tabs.
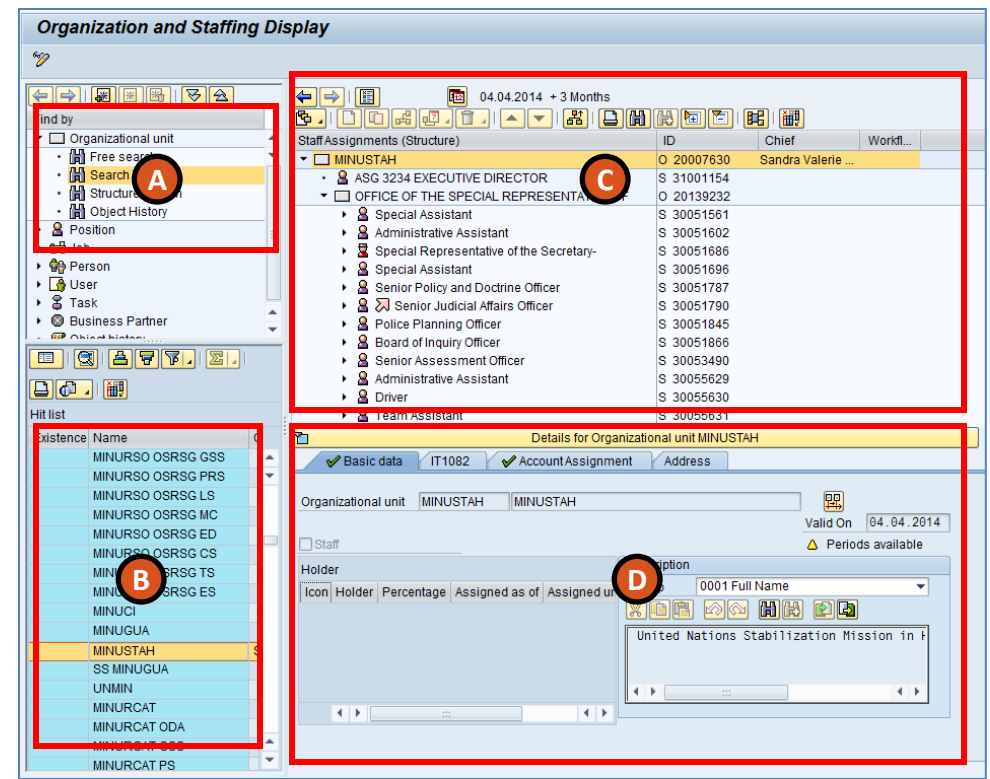
PPOSE Display

In order to perform a basic organizational structure search to get people within and org unit, simply select:

1 Search from the 'Find by' section.

2 As an example, select **Organizational unit** and click **Search Term** in the options displayed below. Then, type in the desired text in the pop-up window.

3 Now double click on the appropriate org unit in the hit list.
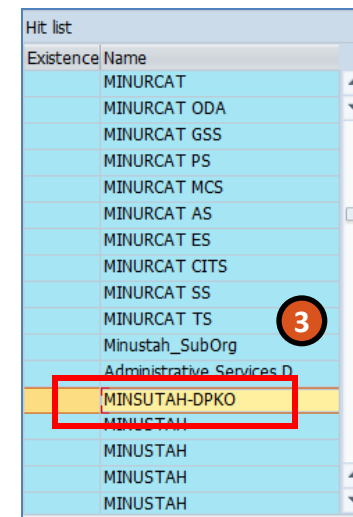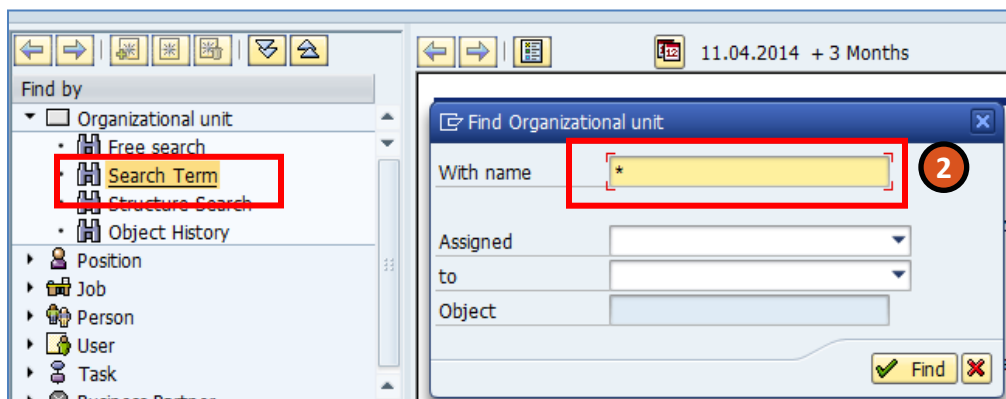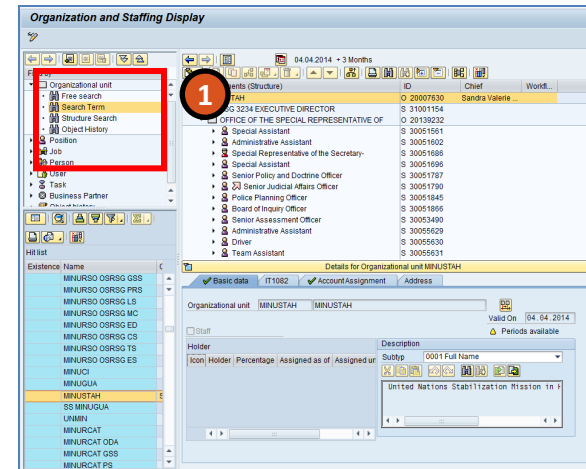
PPOSE Display

In the panel on the right hand side section, all organizational unit details will appear, including:

- Positions under the organizational unit selected.

- People assigned to those positions if any.

PP01 Display - Getting there

PP01

Transaction code **PP01** can be used to maintain all Organizational Management objects.

Due to authorization restrictions, not all users have access to **PP01**.
Instead, depending on the enterprise role mapping, users will have to use one of the following transactions, which restrict access to one particular object type:

- **PO10D** Organizational Unit

- **PO13D** Position

- Once in Umoja ECC, to access the transaction just type **PP01 (or any other of the transactional codes given)** in the main menu **Command** field and press **ENTER** button in the keyboard.
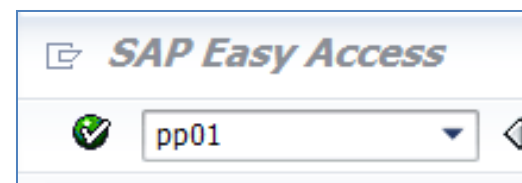
PP01/PO10D/ PO13D Display

PP01

In the main screen, there are 3 different sections.

1 Header: In this panel, select object type through a dropdown menu. Then, type or search the appropriate object ID.

2 Infotype Name: List of infotypes available for the object.

3 Time period: Date validity period for the object infotypes.

PP01/PO10D/ PO13D Display

To display a set of infotypes of any Organizational Management object, simply select:

(1) As an example, select Organizational Unit from the **Object type** drop-down menu in the Header section.

(2) Type or search the code in **Object ID** field and press enter.

(3) Select the infotype to display in the list below.

(4) Click display icon in the taskbar.

PP01/PO10D/ PO13D Display

The selected infotype is displayed in the screen.

Note: Fields in the infotype appear in blue, meaning they cannot be modified when entering with display.

Module 4 Summary

The key points covered in this module are:

- Main transactional codes for Organizational Management
- Description on how to display all positions and persons within an org unit
- Description of the steps and screens to maintain all Organizational Management object
- Description of the steps and screens to create and maintain integrally any Organizational Management objects

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Course Summary

The key points covered in this course are:

- High-level organizational impacts of Organizational Management responsibilities

- Different types of Master Data relevant for Organizational Management

- End-to-end Organizational Management processes

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Course Assessment

Now that you have completed all the modules in this course, you can test your knowledge by completing the Course Assessment.

To receive credit for completing this course, you must pass this assessment with a minimum score of 90%.

To complete the assessment you must return to the Learning Management System:

1. Log into Inspira

2. Navigate to *Main Menu -> Self-Service -> Learning -> My Learning*

3. Search for the name of the course under the **My Learning Activities** section

4. Click the **Start** link of the course assessment

5. Click the **Submit** button once you have completed the assessment

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| Course Summary |
| Course Assessment |
| **Course Survey** |

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Course Survey

Your feedback is important to the continuous improvement of our training program.

Please complete the evaluation for this course using the following steps:

1. Log into Inspira

2. Navigate to *Main Menu -> Self-Service -> Learning -> My Learning*

3. Search for the name of the course under the **My Learning Activities** section

4. Click the **Start** link of the course survey

5. Click the **Submit** button once you have completed the course survey
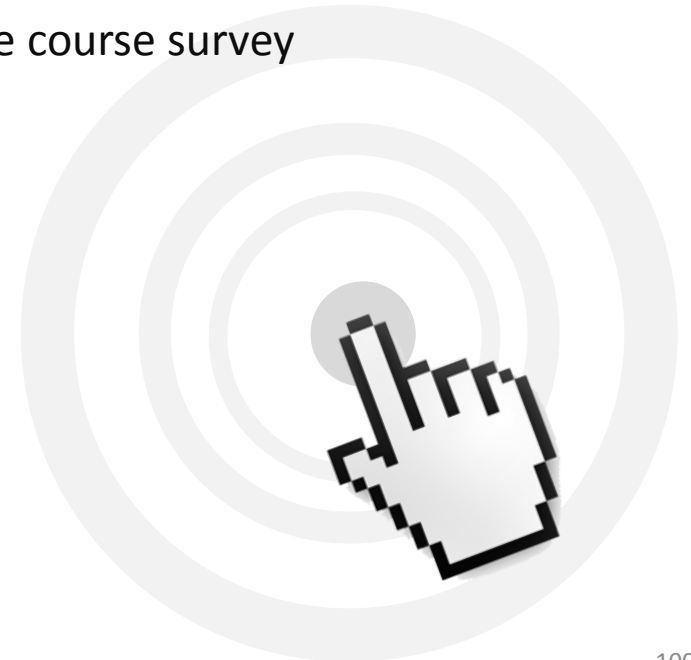
Congratulations! You have successfully completed the
Umoja Organizational Management Overview **course.**

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