Umoja Course Catalogue
## Course Curriculum Summary

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<th></th>
<th>No. of Courses</th>
<th>Training Duration (hours)</th>
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<td>Introduction &amp; Navigation</td>
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<td>Grants &amp; Project Management</td>
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<td>Logistics Execution</td>
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<td>Treasury &amp; Cash Management</td>
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Introduction & Navigation
### NA101: Umoja Overview

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<tr>
<td>Course Prerequisites</td>
<td>This course is a prerequisite for all Umoja courses</td>
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</table>

### High Level Overview

Umoja Overview is designed to be introductory in nature. This course will discuss the benefits, governance structure, and changes occurring as a result of Umoja.

All Umoja users will be required to take this course as an introduction to the Umoja curriculum. Each user will be assigned to a series of role-specific courses following the completion of this course.

### Modules

This course includes the following modules:

<table>
<thead>
<tr>
<th>Module</th>
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<tbody>
<tr>
<td>Course Introduction</td>
</tr>
<tr>
<td>Umoja Introduction</td>
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<tr>
<td>Umoja Foundation Solution</td>
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<tr>
<td>Course Summary</td>
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<tr>
<td>Course Assessment</td>
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<td>Course Survey (optional)</td>
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MD102: Umoja Master Data and Coding Block Overview

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Course Prerequisites

- 101: Umoja Overview

Umoja Enterprise Roles

- All Enterprise Roles
- All Master Data Maintainer Roles

High Level Overview

Umoja Master and Data Coding Block Overview describes the Umoja Enterprise Structure and explains the concept of Reference Data, Master Data and Transactional Data. The course details how Reference Data is used in Umoja, and the use of Master Data based on the UN operating Model. It outlines the benefits of Master Data and explains how Master Data is used in the Umoja Coding Block.

Modules

This course includes the following modules:

- Course Introduction
- Umoja Master Data Overview
- Umoja Coding Block Overview
- Course Summary
- Course Assessment
- Course Survey (optional)
NV201: Umoja ECC Navigation

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</table>
| Course Prerequisites | 101: Umoja Overview  
102: Umoja Master Data & Coding Block Overview |

High Level Overview

Umoja ECC Navigation orients users to the Umoja solution and shows how to navigate through the Umoja Enterprise Central Component (ECC). This course includes instructions on how to log on/off, screen layouts, screen elements and field types. After completing this course, users will know how to create, change and display a transaction and how to use transaction codes (T-codes) effectively.

This course will describe the steps in which to generate reports from Umoja ECC, and how to utilize the online help functionality.

Modules

This course includes the following modules:

- Course Introduction
- Module 1: Umoja ECC Navigation Fundamentals
- Module 2: Umoja ECC Additional Features
- Module 3: Umoja Workflows and Approvals
- Module 4: Umoja ECC Reporting
- Course Summary
# NV202: Umoja SRM Navigation

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<table>
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<tbody>
<tr>
<td>101: Umoja Overview</td>
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<tr>
<td>102: Umoja Master Data &amp; Coding Block Overview</td>
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### Umoja Enterprise Roles

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<tr>
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<tr>
<td>BP.04</td>
<td>BP Maintainer Commercial - Bank Data</td>
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<td>BP.11</td>
<td>BP Approver Global - Bank Data</td>
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<td>PP.01</td>
<td>Project Management Approver</td>
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<td>Project Management User</td>
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<tr>
<td>PP.03</td>
<td>Project Management Master Data Maintainer</td>
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<tr>
<td>SA.01a</td>
<td>SA Requisitioner (Shopping Carts - goods/services excluding HR)</td>
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<tr>
<td>SA.01b</td>
<td>SA Requisitioner (Shopping Carts - HR for ICs/Consultants only)</td>
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<tr>
<td>SA.02</td>
<td>SA Requisitioner - Direct Procurement</td>
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<tr>
<td>SA.03</td>
<td>SA Buyer</td>
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<td>SA.04</td>
<td>SA Human Resources Partner</td>
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<td>SA.06</td>
<td>SA Buyer Supervisor</td>
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<td>SA.07a</td>
<td>SA Approver (Shopping Carts - IC/Consultants Contracts, LVA, and all others)</td>
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<td>SA.07b</td>
<td>SA Approver (Solicitations, POs and Contracts)</td>
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<tr>
<td>SA.08</td>
<td>SA Low Value Acquisitioner</td>
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<tr>
<td>SA.09</td>
<td>SA Bid Floor Administrator</td>
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## High Level Overview

Umoja SRM Navigation introduces the features and benefits of the Umoja Supplier Relationship Management (SRM) portal. The course lists the different Procurement process activities for which Umoja SRM is being implemented and identifies the functional changes occurring after the Umoja SRM implementation.

## Modules

This course includes the following modules:

- Course Introduction
- Module 1: Umoja SRM Overview
- Module 2: Umoja SRM Navigation
- Course Summary
- Course Assessment
- Course Survey (optional)
NV203: Umoja BI Navigation

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<td>Level</td>
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**Course Prerequisites**

- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 201: Umoja ECC Navigation

**Umoja Enterprise Roles**

- Benefits
- Business Partner
- Financial Accounting
- Financial Management
- Manager Self Service
- Organizational Management
- Personnel Administration
- Programme Projects
- Payroll
- Receive to Distribute
- Real Estate
- Source to Acquire
- Services Delivery
- Time Management
- Treasury
- Travel Management

**High Level Overview**

Umoja BI Navigation introduces the features and benefits of Umoja’s Enterprise Business Intelligence (BI)/Reporting tool. This course defines new BI terminology, identifies components of the tools and describes the overall data architecture. Upon completion of this course, users will know how to access and execute a report in the BI environment.

Note: Advanced functionality will be included in separate training content.

**Modules**

*This course includes the following modules:*

- Course Introduction
- Module 1: BI Overview
- Module 2: BI Navigation
- Course Summary
- Course Assessment
- Course Survey (optional)
NV211: Umoja Employee Self-Service (ESS) Basic Navigation

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<td>203: Umoja BI Navigation</td>
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<tr>
<td>Umoja Enterprise Roles</td>
<td>All Enterprise Roles</td>
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High Level Overview

Umoja Employee Self-Service (ESS) Basic Navigation is intended to explain Umoja portal navigation fundamentals, as to highlight related concepts and terms that are new to Umoja users.

*This course is a highly recommended Inspira Tutorial*

*NV211 is a CBT course in Inspira not mandated by OHRM, but can be required at the discretion of the entity.*

Modules

*This course includes the following modules:*

- Course Introduction
- Module 1: Umoja Employee Self-Service Navigation Fundamentals
- Module 2: Umoja Employee Self-Service Functionalities
- Course Summary
- Course Assessment
- Course Survey (optional)
NV301: Umoja Advanced BI Navigation

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Course Prerequisites

- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 203: Umoja BI Navigation

Umoja Enterprise Roles

- PY.12 Payroll Display All
- PY.15 Payroll Report All
- PY.18 Payroll Bank Signatory
- TM.02 Time Senior Administrator
- TM.07 Time Report All
- TM.08 Time Report LS

High Level Overview

Umoja Advanced BI Navigation describes Umoja Business Intelligence (BI) reports. The course explains how to access Online Analytical Processing (OLAP) reports. It details the steps to define, modify, add and delete an analysis within an OLAP report, and the steps to add and customize charts within an OLAP report. It also explains the steps to save, send, and print an analysis within an OLAP report.

Modules

This course includes the following modules:

- Course Introduction
- Module 1: BI Overview
- Module 2: OLAP Reports
- Module 3: Define and Modify an Analysis
- Module 4: Add a Sub-analysis and Chart
- Module 5: Save, Send and Print an Analysis
- Course Summary
- Course Assessment
- Course Survey (optional)
Functional Area:

Facilities & Fixed Asset Management
# CS109: Umoja Real Estate Management Overview

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</table>
| **Course Prerequisites** | 101: Umoja Overview  
| | 102: Umoja Master Data & Coding Block Overview |

## High Level Overview

Umoja Real Estate Management Overview describes the Real Estate Management process within Umoja. This course identifies the key roles, responsibilities, and processes, as it highlights the key changes and benefits to Real Estate Management.

## Modules

*This course includes the following modules:*

- Course Introduction
- Module 1: Real Estate Management Overview
- Module 2: Portfolio Management Overview
- Module 3: Lease (Contract) Administration
- Course Summary
- Course Assessment
- Course Survey (optional)
# CS324: Umoja Lease Administration Process

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## Duration
2 Days

## Delivery Method
Instructor Led Training (ILT)

## Level
Level 3

## Course Prerequisites
- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 109: Umoja Real Estate Management Overview
- 201: Umoja ECC Navigation

## Umoja Enterprise Roles
- RE.01 RE Facilities Planner
- RE.02 RE Facilities Approver
- RE.03 RE Lease Processor
- RE.04 RE Lease Contract Approver

## High Level Overview
Umoja Lease Administration explains the roles, responsibilities, and key elements of Lease Administration in Umoja. The course details the steps required for creating, approving and maintaining Lease-In, Internal and External Lease-Out, and Sales-Based Lease-Out contracts. The course also outlines the various reports available in Lease Administration.

## Modules

*This course includes the following modules:

- Course Introduction
- Module 1: Lease Administration Overview
- Module 2: Key Elements of Lease Administration
- Module 3: Lease-in Process
- Module 4: External and Internal Lease-out Process
- Module 5: Sales-based Lease-out Process
- Module 6: Contract Approvals
- Module 7: Lease Administration Reporting
- Course Summary
- Course Assessment
- Course Survey (optional)
## CS325: Umoja Real Estate Portfolio Management

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### Course Prerequisites

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<th>Course</th>
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<tr>
<td>101:</td>
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<tr>
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### Umoja Enterprise Roles

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### High Level Overview

Umoja Real Estate Planning describes the Portfolio Management process and explains the Umoja solution for Portfolio Management. This course details how to create and maintain architectural and usage objects. It outlines how to create pooled spaces and extract rental spaces and how to create a standard report in RE-FX.

### Modules

**This course includes the following modules:**

- Course Introduction
- Module 1: Portfolio Management Overview
- Module 2: Create and Maintain Architectural Objects
- Module 3: Create and Maintain Usage Objects
- Module 4: Create Pooled Space
- Module 5: Approve Real Estate Objects
- Module 6: Real Estate Reporting
- Course Summary
- Course Assessment
- Course Survey (optional)
# PJ370: Umoja Assets Under Construction

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## High Level Overview

The purpose of the Assets under Construction (AuC) Course is to provide an end-to-end instruction and various scenarios for the Asset under Construction process.

## Course Prerequisites

<table>
<thead>
<tr>
<th>101: Umoja Overview</th>
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<tbody>
<tr>
<td>102: Umoja Master Data &amp; Coding Block Overview</td>
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<tr>
<td>104: Umoja Funds Management Overview</td>
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<td>201: Umoja ECC Navigation</td>
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## Modules

*This course includes the following modules:*

- Course Introduction
- Module 1: Assets Under Construction Overview
- Module 2: Setting up a Cost Collector
- Module 3: Monthly Activities
- Module 4: Completion of AuC and Final Settlement
- Course Summary
- Course Assessment
- Course Survey (optional)

## Umoja Enterprise Roles

| FA.15 FA Asset Accounting User |
| FA.16 FA Asset Accounting Senior User |
Functional Area:

Financial Accounting
# FI113: Umoja Accounts Payable Overview

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<tr>
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<td>102: Umoja Master Data &amp; Coding Block Overview</td>
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</table>

## High Level Overview

Umoja Accounts Payable Overview identifies the important changes occurring as a result of the Umoja solution, and discusses the impact these changes will have on the Accounts Payable process. This course describes the park and post functionality, and the 3-way matching process.

## Modules

This course includes the following modules:

- **Course Introduction**
- **Module 1: Financial Accounting in Umoja**
- **Module 2: Invoice Processing**
- **Module 3: Other Accounts Payable Activities**
- **Course Summary**
- **Course Assessment**
- **Course Survey (optional)**

## Umoja Enterprise Roles

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<td>FA.04</td>
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<tr>
<td>FA.05</td>
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<tr>
<td>FA.07</td>
</tr>
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<td>FA.13</td>
</tr>
<tr>
<td>FA.15</td>
</tr>
<tr>
<td>FA.16</td>
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</table>

- FA.02 FA User (AP)
- FA.04 FA Petty Cash Imprest User
- FA.05 FA Senior User (GL/AP/AR/CO)
- FA.07 FA Approver (AP)
- FA.13 FA Month End User
- FA.15 FA Asset Accounting User
- FA.16 FA Asset Accounting Senior User
FI115: Umoja Accounts Receivable Overview

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<tr>
<td>101: Umoja Overview</td>
<td></td>
</tr>
<tr>
<td>102: Umoja Master Data &amp; Coding Block Overview</td>
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**High Level Overview**

Umoja Accounts Receivable Overview identifies the important changes occurring as a result of the Umoja solution and discusses the impact these changes will have on the Accounts Receivable process. This course defines the high-level process, roles within the process and the interactions between the Accounts Receivable process and other business areas within Umoja.

It incorporates the Master Data elements associated with this process and reporting capabilities through Umoja Business Intelligence (BI).

**Modules**

*This course includes the following modules:*

- Course Introduction
- Module 1: Introduction to Accounts Receivable
- Module 2: Accounts Receivable Master Data
- Module 3: Accounts Receivable Processes
- Course Summary
- Course Assessment
- Course Survey (optional)
Umoja Asset Accounting Overview identifies the important changes occurring as a result of the Umoja solution and discusses the impact that these changes will have on the Asset Accounting process. This course defines the high-level process, roles within the process and the interactions between the Asset Accounting process and other business areas within Umoja. It illustrates the lifetime of an asset.

It incorporates the Master Data elements associated with this process and reporting capabilities through Umoja Business Intelligence (BI).

This course includes the following modules:

- Course Introduction
- Module 1: Umoja Asset Accounting
- Module 2: Asset Accounting Master Data
- Module 3: Asset Accounting Processes
- Course Summary
- Course Assessment
- Course Survey (optional)
**FI308: Umoja General Ledger Process**

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**Course Prerequisites**

- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 201: Umoja ECC Navigation

**Umoja Enterprise Roles**

- FA.01 FA User (GL)
- FA.05 FA Senior User (GL/AP/AR/CO)
- FA.06 FA Approver (GL)

**High Level Overview**

Umoja General Ledger process introduces the business process associated with General Ledger and how the Umoja solution will support this process. The course identifies the three sources of General Ledger entries and explains the difference between account ledgers and subsidiary ledgers. It details how other business areas interact with the General Ledger process.

It incorporates the Master Data elements associated with this process and reporting capabilities through Umoja Business Intelligence (BI).

**Modules**

*This course includes the following modules:*

- Course Introduction
- Module 1: Introduction to Umoja General Ledger
- Module 2: General Ledger Master Data
- Module 3: General Ledger Processes
- Module 4: General Ledger Reporting
- Course Summary
- Course Assessment
- Course Survey (optional)
FI321: Umoja Accounts Payable Process

**LMS Code**

| LMS-1323 |

**Duration**

2 Days

**Delivery Method**

Instructor Led Training (ILT)

**Level**

Level 3

**Course Prerequisites**

- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 113: Umoja Accounts Payable Overview

**Modules**

- **Course Introduction**
- **Module 1: GL Accounts for Accounts Payable**
- **Module 2: Processing Invoices with a Purchase Order**
- **Module 3: Processing Invoices without a Purchase Order**
- **Module 4: Credit Memos and Evaluated Receipt Settlement**
- **Module 5: Down Payments**
- **Module 6: Accounts Payable Reports**

**Course Survey (optional)**

**Umoja Enterprise Roles**

- **FA.02** FA User (AP)
- **FA.04** FA Petty Cash Imprest User
- **FA.05** FA Senior User (GL/AP/AR/CO)
- **FA.07** FA Approver (AP)

**High Level Overview**

Umoja Accounts Payable Process introduces the business process associated with Accounts Payable process and how the Umoja solution will support this process. This course will include the various steps associated with scanning, parking and/or posting invoices; describe how to process Invoices, Credit Notes, Discounts, and Invoice Reductions. Upon completion of this course, users will be able to create invoices for payment of local troops and how to create and replenish Petty Cash/Imprest accounts. It also explains how to execute six types of Down Payments.
## LMS Code

**LMS-1330**

## Duration

2 Days

## Delivery Method

Instructor Led Training (ILT)

## Level

Level 3

### Course Prerequisites

- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 115: Umoja Accounts Receivable Overview
- 201: Umoja ECC Navigation
- 202: Umoja SRM Navigation

### Umoja Enterprise Roles

- FA.03 FA User (AR)
- FA.05 FA Senior User (GL/AP/AR/CO)
- FA.08 FA Approver (AR)

---

## High Level Overview

Umoja Accounts Receivable Process introduces the business process associated with the Accounts Receivable process and how the Umoja solution will support this process. This course outlines the steps involved in Customer Invoice Processing (AR), Incoming Payment Processing, Collections and Write-offs.

---

## Modules

*This course includes the following modules:*

- Course Introduction
- Module 1: Introduction to Accounts Receivable
- Module 2: Customer Invoice Processing
- Module 3: Incoming Payment Processing
- Module 4: Collections
- Module 5: Write-Offs
- Course Summary
- Course Assessment
- Course Survey (optional)
FI332: Umoja Asset Accounting Process

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Course Prerequisites

- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 118: Umoja Asset Accounting Overview
- 201: Umoja ECC Navigation

Umoja Enterprise Roles

- FA.15 FA Asset Accounting User
- FA.16 FA Asset Accounting Senior User

High Level Overview

Umoja Asset Accounting describes the key roles and responsibilities in Asset Accounting and the processes that comprise the lifetime of an asset. This course explains how to maintain an asset under construction, how to execute the asset capitalization process for assets under construction, standalone assets, and finance leases. It details how to complete a depreciation run; the transaction to impair an asset; the transaction to retire an asset by donation, scrapping, and sale; and the transaction to transfer an asset and mass transfer multiple assets.

Modules

- Course Introduction
- Module 1: Umoja Asset Accounting Review
- Module 2: Acquisition of Fixed Assets
- Module 3: Depreciation of Assets
- Module 4: Impairment of Fixed Assets
- Module 5: Retirement of Fixed Assets
- Module 6: Transfer of Fixed Assets
- Module 7: Asset Accounting Reporting
- Course Summary
FI371: Umoja Bank Reconciliation

### High Level Overview

The purpose of the Umoja Bank Reconciliation course is to provide step-by-step guidance on how to process uncleared transaction items through established sub-ledger bank clearing accounts, between a physical bank account maintained by a financial institution and the General Ledger nominal bank account maintained in the Umoja system.

### Modules

- **Course Introduction**
- **Module 1: Introduction to Bank Reconciliation**
- **Module 2: Outgoing Payments**
- **Course Summary**
- **Course Assessment**
- **Course Survey (optional)**

### Course Prerequisites

- **101:** Umoja Overview
- **102:** Umoja Master Data & Coding Block Overview
- **113:** Umoja Accounts Payable Overview
- **201:** Umoja ECC Navigation

### Umoja Enterprise Roles

- **FA.01** FA User (GL)
- **FA.03** FA User (AR)
Functional Area:

Funds & Cost Management
FI104: Umoja Funds Management Overview

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### Umoja Enterprise Roles

- BP.11 BP Approver Global - Bank Data
- FA.13 FA Month End User
- FA.15 FA Asset Accounting User
- FA.16 FA Asset Accounting Senior User
- FM.01 FM Budget Officer User
- FM.02 FM Budget Approver
- FM.03 FM Accounting Office User
- FM.06 FM Funds Commitment Approver
- FM.07 FM Earmarked Funds Documents Certifier

### High Level Overview

Umoja Funds Management Overview examines the Funds Management process and integration points with other areas of finance. This course will explain the Budgeting processes, Earmarked funds, Budget Availability Control (AVC), and Budget Closing operations. It incorporates the Master Data elements associated with this process and reporting capabilities through Umoja Business Intelligence (BI).

### Modules

**This course includes the following modules:**

- Course Introduction
- Module 1: Umoja Funds Management Introduction
- Module 2: Funds Management Master Data
- Module 3: Budget Distribution
- Module 4: Budget Implementation
- Module 5: Budget Closing Operations
- Course Summary
- Course Assessment
- Course Survey (optional)
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**High Level Overview**

Umoja Cost and Management Accounting Overview defines Cost Accounting within the Umoja solution, and identifies the key roles and responsibilities of those contributing to the process.

This course describes the benefits of Umoja Cost Accounting and addresses cost allocations. It incorporates the Master Data elements associated with this process and reporting capabilities through Umoja Business Intelligence (BI).

**Modules**

*This course includes the following modules:*

- Course Introduction
- Module 1: Umoja Cost and Management Accounting
- Module 2: Cost and Management Accounting Master Data
- Module 3: Cost and Management Accounting Processes
- Course Summary
- Course Assessment
- Course Survey (optional)
FI309: Umoja Budget Distribution

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Course Prerequisites

- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 104: Umoja Funds Management Overview
- 106: Umoja Grants Management Overview
- 201: Umoja ECC Navigation

Umoja Enterprise Roles

- FM.01 FM Budget Officer User
- FM.02 FM Budget Approver
- FM.03 FM Accounting Office User

High Level Overview

Umoja Budget Distribution introduces the business process associated with Budget Processing and how the Umoja solution will support this process. This course will illustrate how to enter or upload a budget allotment and supplement, and how to complete activities related to a budget transfer and budget return. It also details the steps required to close out a budget.

Modules

This course includes the following modules:

- Course Introduction
- Module 1: Budget Distribution in Umoja – Overview
- Module 2: Budget Enter Process
- Module 3: Budget Transfers (Allotments & Redeployments)
- Module 4: Budget Supplements (Commitment Authority)
- Module 5: Budget Returns (Savings)
- Module 6: Budget Closing Activities
- Module 7: Documents and Workflows
- Course Summary
- Course Assessment
- Course Survey (optional)
# FI310: Umoja Budget Implementation

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## Prerequisites
- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 104: Umoja Funds Management Overview
- 106: Umoja Grants Management Overview
- 201: Umoja ECC Navigation

## Umoja Enterprise Roles
- FM.01 FM Budget Officer User
- FM.02 FM Budget Approver
- FM.03 FM Accounting Office User
- FM.06 FM Funds Commitment Approver
- FM.07 FM Earmarked Funds Documents Certifier

## High Level Overview
Umoja Budget Implementation explains the purpose of pre-commitments and funds commitments and describes the related workflow process. This course outlines how to create, change and zero out a funds pre-commitment, funds commitment, travel funds commitment, funds blocks and reservations, and describes how to view the status of a funds commitment or pre-commitment.

## Modules

This course includes the following modules:

- Course Introduction
- Module 1: Introduction to Funds Commitment
- Module 2: Funds Pre-commitment
- Module 3: Funds Commitment
- Module 4: Travel Funds Commitment
- Module 5: Funds Blocks & Funds Reservations
- Module 6: Budget Implementation Workflows & Reports
- Course Summary
- Course Survey (optional)
- Course Assessment
# FI314: Umoja Cost and Management Accounting Process

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### Course Prerequisites

- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 108: Umoja Cost & Management Accounting Overview
- 201: Umoja ECC Navigation

### Umoja Enterprise Roles

- FA.13 FA Month End User
- FA.15 FA Asset Accounting User
- FA.16 FA Asset Accounting Senior User

## High Level Overview

Umoja Cost and Management Accounting Process describes how to enter, view and reverse an activity allocation and a manual cost allocation. This course addresses the steps to create, maintain, execute, and delete an indirect activity allocation, an assessment cycle and a distribution cycle. Upon completion of this course, a user will be able to set an activity rate and identify the different types of cost allocations.

## Modules

*This course includes the following modules:

- Course Introduction
- Module 1: Umoja Cost and Management Accounting Review
- Module 2: Manual Cost Allocation
- Module 3: Direct Activity Allocation
- Module 4: Allocation Cycles
- Module 5: Cost and Management Accounting Reports
- Course Summary
- Course Assessment
- Course Survey (optional)
Functional Area:

Grants & Project Management
Grants Management Overview is an introduction to Grants Management in Umoja. This course lists the key roles and responsibilities involved in the GM process and describes the key changes and benefits of Umoja GM. It details the elements that constitute GM Master Data and outlines the GM process in Umoja.

This course includes the following modules:

- Course Introduction
- Module 1: Introduction to Grants Management
- Module 2: Grants Management Master Data
- Module 3: Grants Management for Grantee Process in Umoja
- Course Summary
- Course Assessment
- Course Survey (optional)

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## Course Prerequisites

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## Umoja Enterprise Roles

- FM.08 GM Account User
- FM.09 GM Account Creator
- FM.10 GM Account Approver
- FM.13 GM Budget User Unreleased
- FM.14 GM Budget User Released
- FM.15 GM Budget Approver Unreleased
- FM.16 GM Budget Approver Released
- PP.01 Project Management Approver
- PP.02 Project Management User
- PP.03 Project Management Master Data Maintainer

## High Level Overview

Umoja Grants Management - Framework 1 explains the key concepts for the GM for Grantee Process, lists the key roles and responsibilities involved in the process, and describes the Master Data elements used and outlines the high-level process steps. The course also details Framework 1 grants, including how to create the key Master Data elements, create and approve an unreleased grant budget, perform the required billing activities, create a released grant budget, and close a framework 1 grant. Finally, the course reviews the reports involved in the GM for Grantee process.

## Modules

*This course includes the following modules:*

- Course Introduction
- Module 1: Grants Management Review
- Module 2: Set Up Master Data
- Module 3: Create Unreleased Grant Budget
- Module 4: Perform Grant Billing
- Module 5: Create Released Grant Budget
- Module 6: Close Grant
- Module 7: Reporting
- Module 8: Learning Activity – Grant Scenarios
- Course Summary
- Course Assessment
- Course Survey (optional)
## FI312: Umoja Grants Management Process – Framework II

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### Course Prerequisites

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### Umoja Enterprise Roles

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### High Level Overview

Umoja Grants Management - Framework 2 explains the key concepts of the Grants Management for Grantee process. The course describes the Master Data elements used in the GM for Grantee process and how to create the key Master Data elements for GM. It details the high level process steps in the GM for Grantee process including creating and approving an unreleased grant budget for a Framework 2 grant, performing billing for a Framework 2 grant, creating and approving a released grant budget for a Framework 2 grant, and closing a Framework 2 grant. The course also outlines the reports involved in the GM for Grantee Process.

### Modules

**This course includes the following modules:**

- Course Introduction
- Module 1: Grants Management Review – Grant Types and Frameworks
- Module 2: Set Up Master Data
- Module 3: Link Resource Mobilization, Main Implementation and Pass-through Grants
- Module 4: Create Unreleased Grant Budget
- Module 5: Perform Grant Billing
- Module 6: Create Released Grant Budget
- Module 7: Close Grant
- Module 8: Reporting
- Module 9: Learning Activity – Grant Scenarios
- Course Summary
- Course Assessment
- Course Survey (optional)
FI313: Umoja Grants Management Process – Pass-Through Grants Execution

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**Course Prerequisites**

- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 106: Umoja Grants Management Overview
- 201: Umoja ECC Navigation
- 311: Umoja Grants Management - Framework 1
- 312: Umoja Grants Management – Framework 2

**Umoja Enterprise Roles**

- FM.08 GM Account User
- FM.09 GM Account Creator
- FM.10 GM Account Approver
- FM.13 GM Budget User Unreleased
- FM.14 GM Budget User Released
- FM.15 GM Budget Approver Unreleased
- FM.16 GM Budget Approver Released
- PP.01 Project Management Approver
- PP.02 Project Management User
- PP.03 Project Management Master Data Maintainer

**High Level Overview**

The purpose of this course is to explain the detailed process involved when funds are provided to implementing partners.

**Modules**

*This course includes the following modules:*

- Course Introduction
- Module 1: Overview of Pass-through Grant Execution Process
- Module 2: Creation and Approval of Grant Purchase Order
- Module 3: Processing of Advance
- Module 4: Settlement of Advance and Processing of Invoice
- Module 5: Reports
- Course Summary
- Course Assessment
- Course Survey (optional)
## PJ315: Umoja Project Management Process

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### Umoja Enterprise Roles

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### High Level Overview

Umoja Project Management details the project management process in Umoja. The course lists the key roles and responsibilities involved in the Project Management Process. It explains the processes within Project Management including how to create and maintain a project, monitor and close a project, and release a project. It also outlines Project Systems in Umoja. The course also lists the reports involved in the Project Management process, and explains how to create and maintain project templates and profiles.

### Modules

*This course includes the following modules:*

- **Course Introduction**
- **Module 1: Introduction to Project Management**
- **Module 2: Project Systems**
- **Module 3: Project Creation and Maintenance**
- **Module 4: Project Implementation**
- **Module 5: Project Systems Reporting**
- **Module 6: Project Templates and Profiles**
- **Module 7: Appendix – Defining Project Milestones**
- **Course Summary**
- **Course Assessment**
- **Course Survey (optional)**

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Human Resources Administration
SC121: Umoja Requesting and Managing Services for Consultants & ICs Overview

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PA.03 HR Partner UNV  
PA.04 HR Partner UP  
PA.05 HR Partner CIC  
SA.01b SA Requisitioner (Shopping Carts - HR for ICs/Consultants only)  
SA.04 SA Human Resources Partner  
SA.07a SA Approver (Shopping Carts - IC/Consultants Contracts, LVA, and all others)  
SA.07b SA Approver (Solicitations, POs and Contracts) |

* Required only IF they also deal with C & ICs, as not all HR Partners also approve/manage C & ICs across the board

**High Level Overview**

Umoja Requesting and Managing Services of Consultants and Individual Contractors Overview identifies the key changes and benefits of the Umoja solution for the Consultant and IC recruitment process. It lists the roles and responsibilities, and further explains the Master Data relevant in this process. It describes the function of Umoja SRM in the Consultant and IC recruitment process, as well as the concept and use of Shopping Carts in an HR context and the concept of online approvals and reviews.

**Modules**

This course includes the following modules:

- Course Introduction
- Module 1: Master Data
- Module 2: Requesting for Services of Consultants and Individual Contractors in Umoja
- Module 3: Creating a Request
- Module 4: Contracts for Consultants and Individual Contractors

Course Summary

Course Assessment

Course Survey (optional)
SC341: Umoja Requesting Services of Consultants and ICs Process

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### Course Prerequisites

- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 121: Umoja Requesting and Managing Services of Consultants and ICs Overview
- 201: Umoja ECC Navigation
- 202: Umoja SRM Navigation

### Umoja Enterprise Roles

- PA.05 HR Partner CIC
- SA.01b SA Requisitioner (Shopping Carts - HR for ICs/Consultants only)
- SA.04 SA Human Resources Partner
- SA.07a SA Approver (Shopping Carts - IC/Consultants Contracts, LVA, and all others)

### High Level Overview

Umoja Requesting Services of Consultants and Independent Contractors outlines the key roles and responsibilities involved in the Requesting Services for Consultants and Independent Contractors process. The course explains the steps involved in the process and outlines how to create, approve and edit a Shopping Cart for the services of consultants and independent contractors.

### Modules

This course includes the following modules:

- **Course Introduction**
- **Module 1**: Requesting Services of Consultants and Independent Contractors
- **Module 2**: Create Service Request in Form of Shopping Cart
- **Module 3**: Approve or Reject Shopping Cart
- **Module 4**: Accept or Edit Shopping Cart
- **Course Summary**
- **Course Assessment**
- **Course Survey (optional)**
SC343: Umoja Management of Consultants and ICs

**LMS Code**: LMS-1531

**Duration**: 1.5 Days

**Delivery Method**: Instructor Led Training (ILT)

**Level**: Level 3

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**Umoja Enterprise Roles**

PA.05 HR Partner CIC

---

**High Level Overview**

Umoja Managing Services of Consultants and Independent Contractors outlines the key roles and responsibilities involved in the process of managing services for Consultants and Independent Contractors. The course explains the steps involved in creating, approving and editing an HR contract.

---

**Modules**

*This course includes the following modules:*

- Course Introduction
- Module 1: Create HR Contract
- Module 2: Approve HR Contract
- Module 3: Accept or Edit HR Contract
- Course Summary
- Course Assessment
- Course Survey (optional)

* Required only IF they also deal with C & ICs, as not all HR Partners also approve/manage C & ICs across the board
HR392: Umoja HR Partner Course

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High Level Overview

The HR partner course provides a comprehensive overview of all transactions that the HR partner will need to conduct in Umoja in the areas of personnel administration, entitlements, time, HR and Entitlement travel. In addition to focusing on the procedural aspects of Umoja, the course will also review the policies that underpin the transactional work of the HR partner. Given that this is an integrated course on policy and procedures, the course Umoja administration of personnel contracts is a prerequisite.

Modules

This course includes the following modules:

- Course Introduction
- Module 1: Personnel Administration
- Module 2: Entitlements
- Module 3: Time, HR and entitlement travel
- Course Summary
- Course Assessment
- Course Survey (optional)
Functional Area:

Logistics Execution
## SC123: Umoja Logistics Overview (Non-Peacekeeping)

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### Modules

This course includes the following modules:

- **Course Introduction**
- **Module 1: Umoja Logistics Overview**
- **Module 2: Logistics Master Data**
- **Module 3: Logistics Execution Processes**
- **Course Summary**
- **Course Assessment**
- **Course Survey (optional)**

### High Level Overview

The purpose of the Umoja Logistics Overview course is to explain the Foundation processes for Inventory Management (IM). This course will also highlight some of the Warehouse Management (WM) processes and functionality for those locations which will have WM functionality implemented.
## SC339: Umoja Local Inventory Goods Movement

### LMS Code
LMS-1935

### Duration
2 Hours

### Delivery Method
Instructor Led Training (ILT)

### Level
Level 3

### Course Prerequisites
- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 123: Umoja Logistics Overview (Non-PK)
- 201: Umoja ECC Navigation

### Umoja Enterprise Roles
- RD.04 RD Inventory User
- RD.05 RD Inventory Senior User
- RD.10 RD Warehouse User
- RD.11 RD Warehouse Senior User (Manager)

### High Level Overview
The purpose of the Umoja Local Inventory Goods Movement course is to explain the steps to issue or transfer inventory without shipment in the Umoja system.

### Modules
This course includes the following modules:

- Module 1: Local Inventory Goods Movement Process Overview
- Module 2: Reservation Management Process
- Module 3: Goods Issue Process
- Module 4: Goods Transfer Process
- Module 5: Exception Processes
- Module 6: Reports
- Course Summary
- Course Assessment
- Course Survey (optional)
## SC340: Umoja Warehouse Management

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### High Level Overview

The purpose of the Warehouse Management course is to explain the Warehouse Management process at the UN.

### Modules

*This course includes the following modules:*

- **Module 1:** Warehouse Management Overview
- **Module 2:** Put-Away Goods
- **Module 3:** Pick Goods
- **Module 4:** Move Goods Internally and Manage Bins
- **Module 5:** Execute Disposal of Goods
- **Module 6:** Perform Physical Count in Warehouse

- Course Summary
- Course Assessment
- Course Survey (optional)
# SC342: Umoja Service Receipt Process - Non HR

## LMS Code
- **LMS-1570**

## Duration
- 3.5 Hours

## Delivery Method
- Computer Based Training (CBT)

## Level
- Level 3

## Course Prerequisites
- **101:** Umoja Overview
- **102:** Umoja Master Data & Coding Block Overview
- **123:** Umoja Logistics Overview (Non-Pk)
- **201:** Umoja ECC Navigation

## Umoja Enterprise Roles
- **SA.01a** SA Requisitioner (Shopping Carts - goods/services excluding HR)
- **SA.02** SA Requisitioner - Direct Procurement
- **SA.07a** SA Approver (Shopping Carts - IC/Consultants Contracts, LVA, and all others)
- **SA.07b** SA Approver (Solicitations, POs and Contracts)

## High Level Overview
Umoja Service Receipt Process outlines the service receipt process and lists the roles and responsibilities involved. The course explains how to review a purchase order, how to create, approve, reverse and delete a service entry sheet. The course also details the types of reports that can be run on service entry sheets.

## Modules

*This course includes the following modules:*
- **Course Introduction**
- **Module 1:** Service Receipt Process Overview
- **Module 2:** Review Purchase Order
- **Module 3:** Create Service Entry Sheet
- **Module 4:** Approve Service Entry Sheet
- **Module 5:** Reverse/Delete Service Entry Sheet
- **Module 6:** Reporting
- **Course Summary**
- **Course Assessment**
- **Course Survey (optional)**
## SC320: Umoja Inbound Goods Process (Peacekeeping)

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### High Level Overview

The purpose of the Umoja Inbound Goods Process course is to train end users on how to support the Inbound Goods process using the Umoja ECC system.

This is an interim process applicable to Peacekeeping and Special Political Missions (SPMs), during the period of coexistence between the Umoja and Galileo systems, for activities performed when receiving goods from commercial/commodity vendors.

### Modules

This course includes the following modules:

- **Course Introduction**
- **Module 1: Umoja Inbound Goods Process Review**
- **Module 2: Inbound Delivery**
- **Module 3: Virtual Goods Receipt**
- **Module 4: Physical Goods Receipt**
- **Module 5: Goods Receipt Returns and Reversals**
- **Module 6: Umoja ECC to Galileo Interface**
- **Course Summary**
- **Course Assessment**
- **Course Survey (optional)**
### Umoja Inbound Goods Process (Non-Peacekeeping)

#### Course Information

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#### Umoja Enterprise Roles

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#### Course Summary

#### Course Assessment

#### Course Survey (optional)

#### High Level Overview

The purpose of the Umoja Inbound Goods Process (Non-Peacekeeping) course is to train end users on how to support the Inbound Goods process using the Umoja ECC system. This process is used for activities performed when receiving goods from commercial/commodity vendors.

#### Modules

*This course includes the following modules:*

- Course Introduction
- Module 1: Umoja Inbound Goods Process Review
- Module 2: Inbound Delivery
- Module 3: Physical Goods Receipt
- Module 4: Serialization
- Module 5: Goods Receipt Returns and Reversals
- Reports
- Course Summary
- Course Assessment
- Course Survey (optional)
SC351: Umoja Inventory Counting and Controlling

LMS Code | LMS-1939
---|---
Duration | 1 Day
Delivery Method | Instructor Led Training (ILT)
Level | Level 3

Course Prerequisites

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Umoja Enterprise Roles

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High Level Overview

The purpose of the Umoja Inventory Counting and Controlling course is to explain how to conduct a Physical Inventory count.

Modules

This course includes the following modules:

- Course Introduction
- Module 1: Umoja Inventory Counting and Controlling Overview
- Module 2: Create Physical Inventory Document
- Module 3: Enter Count Results
- Module 4: Post Differences
- Module 5: Reports
- Course Summary
- Course Assessment
- Course Survey (optional)
Functional Area:

Organizational Management
OM153: Umoja Organizational Management Overview

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102: Umoja Master Data & Coding Block Overview |
| Umoja Enterprise Roles | MS.03 Time Manager Self Service  
OM.01-.04, .07 OM Administrator Roles  
PA.01-.05, .08-.14, .16-.20, .22-.32 Human Resources / Personnel Administration Roles  
TM.01 Time Administrator  
TM.02 Time Senior Administrator  
TM.04 Time Display All  
TM.07 Time Report All |

High Level Overview

Umoja Organizational Management Overview introduces users to a basic understanding of Organizational Management, and identifies the important changes occurring as a result of the Umoja solution. This course defines the new business processes and procedures as a result of the Umoja implementation, illustrates end-to-end organizational management processes, and high-level organizational impacts of Organizational Management responsibilities. Upon completion of this course, the user will be able to process relevant Organizational Management Master Data transactions. This course is a prerequisite for taking the Level 2 courses.

Modules

This course includes the following modules:

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 (optional)
OM3134: Umoja Organizational Management for OM Administrators

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### High Level Overview

Umoja Organizational Management for OM Administrators examines the departmental and organizational impacts of Organizational Management administration responsibilities. Upon completion of this course, the user will be able to reorganize and maintain organizational structure within budget control, create, maintain and loan non-post positions in Umoja ESS.

### Modules

This course includes the following modules:

- Course Introduction
- Module 1: Organizational Management Overview for OM Administrators
- Module 2: Reorganization and Maintain Organizational Structure
- Module 3: Create New Positions
- Module 4: Maintain Position Activities
- Module 5: Loan Position
- Course Summary
- Training Hands-On Exercises
- Course Assessment
- Course Survey (optional)
# OM3135: Umoja Organizational Management for Central Budget Staff

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## Umoja Enterprise Roles

- OM.01 OM Administrator
- OM.02 OM Budget Administrator
- OM.03 OM Job Administrator
- OM.04 OM Budget Super Administrator
- OM.07 OM Certifying officer

## High Level Overview

Umoja Organizational Management for Central Budget Staff examines the departmental and organizational impacts of Organizational Management budget responsibilities. This course will describe the steps in which to reorganize and maintain organizational structure, create, maintain, and loan posts from a budgetary perspective in Umoja ECC.

## Modules

*This course includes the following modules:*

- **Course Introduction**
- **Module 1: Organizational Management Overview for Central Budget Responsibilities**
- **Module 2: Reorganization and Maintain Organizational Structure**
- **Module 3: Create New Positions**
- **Module 4: Maintain Position Activities**
- **Module 5: Loan Position**
- **Module 6: HR Budget Implementation**
- **Course Summary**
- **Sandbox Exercises**
- **Course Assessment**
- **Course Survey (optional)**
Functional Area:

Payroll & Benefits Management
# BN3125: Umoja Benefits Employee Self-Service (ESS) Overview

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## Course Prerequisites
- **101:** Umoja Overview
- **102:** Umoja Master Data & Coding Block Overview

## Umoja Enterprise Roles
- BN .01-.08
- .10-.13
- PA .02-.05
- .08-.14
- .16-.18, .20, .22-.28, .31-.32
- TM.02
- TM.04
- TM.07
- TM.09

## Benefits Roles
- Human Resources / Personnel Administration Roles

## High Level Overview
The purpose of the Umoja ESS Benefits Overview is to explain the standard ESS Umoja Benefits module, as well as key concepts and terms that are new to Umoja users.

## Modules
**This course includes the following modules:**
- Course Introduction
- Module 1: Umoja ESS Benefits Overview
- Module 2: Umoja ESS Benefits Plan Enrollment
- Module 3: Umoja ESS Benefits Change Family Status
- Module 4: Umoja ESS Benefits Change Plan/Reassignment
- Module 5: Umoja ESS Benefits Additional Features
- Course Summary
- Course Assessment
- Course Survey (optional)
BN3126: Umoja Medical and Life Insurance Administration

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Course Prerequisites

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<th>Course</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>101:</td>
<td>Umoja Overview</td>
</tr>
<tr>
<td>102:</td>
<td>Umoja Master Data &amp; Coding Block Overview</td>
</tr>
<tr>
<td>201:</td>
<td>Umoja ECC Navigation</td>
</tr>
<tr>
<td>202:</td>
<td>Umoja SRM Navigation</td>
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</table>

Umoja Enterprise Roles

<table>
<thead>
<tr>
<th>BN</th>
<th>Benefits Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>.01-.08</td>
<td>.10-.13</td>
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</table>

High Level Overview

Umoja Medical and Life Insurance Administration outlines instructions on how to process Annual Insurance Enrolment, ASHI and ASLI Data Administration and enrolment, and how to create HR mini master with only benefit related infotypes.

*CBT with a follow up Q&A via VTC with Umoja Benefits Process Experts prior to Go Live.*

Modules

This course includes the following modules:

- Course Introduction
- Module 1: Enrolment
- Module 2: Payment
- HR Mini Master Data
- Course Summary
- Course Assessment
- Course Survey (optional)
Functional Area:

Services Delivery including Property Management
## High Level Overview

The Umoja Plant Maintenance Overview course provides a high-level introduction to the Plant Maintenance module in Umoja. 

*Previously Plant Maintenance, and is part of the Services Delivery curriculum (no change in content).*

## Course Prerequisites

**LMS Code**

- LMS-1775

**Duration**

- 2 Hours

**Delivery Method**

- Computer Based Training (CBT)

**Level**

- Level 1

**Course Prerequisites**

1. **101: Umoja Overview**
2. **102: Umoja Master Data & Coding Block Overview**

## Umoja Enterprise Roles

**SD.01** SD Notification User  
**SD.02** SD Notification Approver  
**SD.03** SD Planner  
**SD.04** SD Order Releaser  
**SD.08** SD Equipment Verification Planner  
**SD.09** SD Disposal Planner  
**SD.10** SD Equipment Master Data Maintainer  
**SD.11** SD Equipment Master Data Maintainer Local

## Modules

*This course includes the following modules:*

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<thead>
<tr>
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<tbody>
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<td>Module 1: Plant Maintenance Overview</td>
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<tr>
<td>Module 2: Plant Maintenance Master Data</td>
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<td>Module 3: Plant Maintenance Process</td>
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<tr>
<td>Module 4: Plant Maintenance Integration</td>
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<tr>
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</tr>
<tr>
<td>Course Assessment</td>
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<td>Course Survey (optional)</td>
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## SD158: Umoja Services Delivery Overview

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### Umoja Enterprise Roles

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<td>SD Planner</td>
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<td>SD.04</td>
<td>SD Order Releaser</td>
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<td>SD.05</td>
<td>SD User</td>
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<td>SD.06</td>
<td>SD Approver</td>
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<td>SD.07</td>
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<td>SD.08</td>
<td>SD Equipment Verification Planner</td>
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<td>SD.09</td>
<td>SD Disposal Planner</td>
</tr>
<tr>
<td>SD.10</td>
<td>SD Equipment Master Data Maintainer</td>
</tr>
<tr>
<td>SD.11</td>
<td>SD Equipment Master Data Maintainer Local</td>
</tr>
</tbody>
</table>

### High Level Overview

The purpose of the Umoja Services Delivery Overview course is to provide an overview the Umoja Services Delivery process. The Services Delivery process in Umoja includes Property Management, Service Order Management, Sales & Distribution, Cost Recovery and Allocation processes.

### Modules

This course includes the following modules:

- **Course Introduction**
- **Module 1: Introduction to Services Delivery and Cost Recovery**
- **Module 2: Services Delivery Master Data**
- **Module 3: Service Order Management**
- **Module 4: Sales & Distribution**
- **Course Summary**
- **Course Assessment**
- **Course Survey (optional)**
## SD390: Umoja Service Order Management

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<td><strong>Course Prerequisites</strong></td>
<td></td>
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<tr>
<td>101:</td>
<td>Umoja Overview</td>
</tr>
<tr>
<td>102:</td>
<td>Umoja Master Data &amp; Coding Block Overview</td>
</tr>
<tr>
<td>119:</td>
<td>Umoja Property Management Overview</td>
</tr>
<tr>
<td>158:</td>
<td>Umoja Services Delivery Overview</td>
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<tr>
<td><strong>Umoja Enterprise Roles</strong></td>
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<td>SD Planner</td>
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<tr>
<td>SD.04</td>
<td>SD Order Releaser</td>
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</table>

### High Level Overview

The purpose of the Umoja Service Order Management course is to explain the use of Notifications and Service Orders for Services Delivery in Umoja.

### Modules

*This course includes the following modules:*

- Course Introduction
- Module 1: Service Order Management Overview
- Module 2: Notification Creation and Approval
- Module 3: Service Order End to End Process for Internal Service
- Module 4: Service Delivery Scenarios
- Course Summary
- Course Assessment
- Course Survey (optional)
# SD391: Umoja Sales and Distribution

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<td>Umoja ECC Navigation</td>
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<td>SD.05</td>
<td>SD User</td>
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<tr>
<td>SD.06</td>
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</table>

## High Level Overview

Umoja Sales and Distribution details the steps for the SD processes including how to verify master data, create a quotation, create a standard order for billing of common services, sale of inventory/assets, third party procurement, advanced payments and credit/debit memos, as well as the SD approval process.

## Modules

*This course includes the following modules:*

- Course Introduction
- Module 1: Sales and Distribution Overview and Process
- Module 2: Verify Master Data
- Module 3: Create Quotation
- Module 4: Create a Standard Order for Billing of Common Services
- Module 5: Sale of Inventory/Assets & Third Party Procurement
- Module 6: Approval Process
- Module 7: Advanced Payment Requests
- Course Summary
- Course Assessment
- Course Survey (optional)
**SD401: Umoja Distance Learning for Services Delivery including Property Management**

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**Course Prerequisites**

101: Umoja Overview
102: Umoja Master Data & Coding Block Overview
119: Umoja Property Management Overview
158: Umoja Services Delivery Overview

<table>
<thead>
<tr>
<th>Umoja Enterprise Roles</th>
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<tbody>
<tr>
<td>SD.01 SD Notification User</td>
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<td>SD.02 SD Notification Approver</td>
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<tr>
<td>SD.03 SD Planner</td>
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<tr>
<td>SD.04 SD Order Releaser</td>
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<td>SD.05 SD User</td>
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<td>SD.08 SD Equipment Verification Planner</td>
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<td>SD.09 SD Disposal Planner</td>
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<tr>
<td>SD.10 SD Equipment Master Data Maintainer</td>
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<tr>
<td>SD.11 SD Equipment Master Data Maintainer Local</td>
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**High Level Overview**

Services Delivery including Property Management covers how various Property Management transactions fit into the overall Services Delivery model in Umoja. This course also describes how to create Service Notifications, then goes through the Umoja transactions necessary to carry out Equipment Transfer and Equipment Write-off/Disposal processes. The three modules listed below include two virtual learning classes, one focusing on Modules 1 & 2, one focusing on Module 3.

*Please note:* This course does not serve as a substitute for the CBT prerequisites listed here. This VILT encompasses the following courses (no longer individually available): Umoja Equipment Management; Umoja Corrective Maintenance; Umoja Equipment Transfer; Umoja Equipment Write-Off and Disposal.

**Modules**

*This course includes the following modules:*

- **Introduction**
- **Module 1 Services Delivery Overview**
- **Module 2 Notification and Equipment**
- **Module 3 Property Management**
- **Assessment (Inspira)**

*Not available in Inspira yet*
Functional Area:

Source to Acquire
SC110: Umoja Requisitioning Overview

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<tr>
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</tr>
</tbody>
</table>
| Course Prerequisites | 101: Umoja Overview  
102: Umoja Master Data & Coding Block Overview |

**High Level Overview**

Umoja Requisitioning Overview identifies the important changes occurring as a result of the Umoja solution and discusses the impact these changes will have on Requisitioning and other Procurement processes.

It describes the concepts of online approvals and reviews the use of Shopping Carts. This course introduces at a high-level the process for Low Value Acquisitions. It incorporates the Master Data elements associated with this process.

**Umoja Enterprise Roles**

SA.01a SA Requisitioner (Shopping Carts - goods/services excluding HR)
SA.02 SA Requisitioner - Direct Procurement
SA.03 SA Buyer
SA.06 SA Buyer Supervisor
SA.07a SA Approver (Shopping Carts - IC/Consultants Contracts, LVA, and all others)
SA.07b SA Approver (Solicitations, POs and Contracts)
SA.08 SA Low Value Acquirer

**Modules**

This course includes the following modules:

- Course Introduction
- Module 1: Requisitioning in Umoja
- Module 2: Creating Requisitions
- Module 3: Low Value Acquisitions
- Course Summary
- Course Assessment
- Course Survey (optional)
### SC111: Umoja Procurement Overview

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</table>
| **Course Prerequisites** | 101: Umoja Overview  
102: Umoja Master Data & Coding Block Overview |

#### Umoja Enterprise Roles

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<table>
<thead>
<tr>
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<tbody>
<tr>
<td>SA.03</td>
<td>SA Buyer</td>
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<td>SA Buyer Supervisor</td>
</tr>
<tr>
<td>SA.07a</td>
<td>SA Approver (Shopping Carts - IC/Consultants Contracts, LVA, and all others)</td>
</tr>
<tr>
<td>SA.07b</td>
<td>SA Approver (Solicitations, POs and Contracts)</td>
</tr>
<tr>
<td>SA.09</td>
<td>SA Bid Floor Administrator</td>
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</table>

#### High Level Overview

Umoja Procurement Overview identifies the key roles and responsibilities in Procurement, and explains the Procurement process in Umoja. This course introduces the different types of Master Data which are relevant for the Procurement process, and discusses the impact of Umoja SRM on all Procurement processes. Umoja Procurement Overview also details the major changes to the Solicitations and Contracts processes, as well as other key changes after Umoja implementation.

#### Modules

*This course includes the following modules:*

- Course Introduction
- Module 1: Supply Chain Master Data
- Module 2: Solicitations
- Module 3: Contracts and Purchase Orders
- Course Summary
- Course Assessment
- Course Survey (optional)
# MD126: Umoja Material Master Data Overview

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## Course Prerequisites

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<tr>
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<tbody>
<tr>
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<td>102: Umoja Master Data &amp; Coding Block Overview</td>
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## Umoja Enterprise Roles

<table>
<thead>
<tr>
<th>Umoja Enterprise Roles</th>
<th>SA.01a SA Requisitioner (Shopping Carts - goods/services excluding HR)</th>
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<tbody>
<tr>
<td></td>
<td>SA.02 SA Requisitioner - Direct Procurement</td>
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<tr>
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<td>SA.03 SA Buyer</td>
</tr>
<tr>
<td></td>
<td>SA.06 SA Buyer Supervisor</td>
</tr>
</tbody>
</table>

## High Level Overview

The Umoja Material Master Data Overview course will enable participants to describe the Material Master and its various components. It explains the importance of the Material Master in the requisitioning process, and describes the “downstream” effects of selecting correct or incorrect product ID’s for various scenarios. Participants will be able to search for appropriate product ID’s using the Material Master search tool, and submit a request for a new or modified material record.

## Modules

This course includes the following modules:

- Course Introduction
- Module 1: Material Master Data Overview
- Module 2: Using the Material Master Data for Requisitioning
- Module 3: Material Master Data Processes
- Module 4: Case Studies/Scenarios
- Course Summary
- Course Assessment
- Course Survey (optional)
SC318: Umoja Requisitioning

LMS Code | LMS-1320
---|---
Duration | 3 days
Delivery Method | Instructor Led Training (ILT)
Level | Level 3

Course Prerequisites
- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 104: Umoja Funds Management Overview
- 126: Umoja Material Master Data Overview
- 111: Umoja Procurement Overview
- 110: Umoja Requisitioning Overview
- 201: Umoja ECC Navigation
- 202: Umoja SRM Navigation
- 203: Umoja BI Navigation

Umoja Enterprise Roles
- SA.01a SA Requisitioner (Shopping Carts - goods/services excluding HR)
- SA.02 SA Requisitioner - Direct Procurement

High Level Overview
Umoja Requisitioning describes the major steps of the Requisitioning process including creating and submitting a shopping cart, adding an item to a shopping cart, selecting the appropriate account assignments for shopping cart items, and saving and ordering a shopping cart. This course outlines the required changes when procuring for services rather than goods.

Available as an ILT (SC318) and as a Distance Learning Package (SC400).

Modules

This course includes the following modules:

Course Introduction
Module 1: Requisitioning in Umoja
Module 2: Creating a Shopping Cart
Course Summary
Course Assessment
Course Survey (optional)
SC319: Umoja Solicitations

**High Level Overview**

Umoja Solicitations explains how to use the Supplier Relationship Management (SRM) portal to support activities around solicitations. This course will allow users to create a Solicitations document in the SRM portal from an existing requisition and review the correct procedures when selecting between different types of solicitations. The course describes how to add bidders to a Solicitations document and how to reject or award a bid to a particular vendor.

*Also available as part of the Procurement Distance Learning Package (with Umoja Contract and PO Creation)*

**Modules**

*This course includes the following modules:*

- Course Introduction
- Module 1: Solicitations in Umoja
- Module 2: Prepare Solicitations
- Module 3: Receive and Evaluate Bids
- Course Summary
- Course Assessment
- Course Survey (optional)
# SC323: Umoja Requisitioning and Procurement Approvals

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## Course Prerequisites

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<td>Umoja Procurement Overview</td>
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## Umoja Enterprise Roles

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<td>SA.07b</td>
<td>SA Approver (Solicitations, POs and Contracts)</td>
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## High Level Overview

Umoja Procurement Approvals describes the overall approval process and the different types of documents that require approval in Umoja SRM. This course will explain the concept of Workflow Approvals and key responsibilities throughout the process. Upon completion of this course, users will be able to monitor the Universal Worklist for required approvals and approve a shopping cart, RFX document or Contract.

## Modules

**This course includes the following modules:**

- Course Introduction
- Module 1: Approvals in Umoja
- Module 2: Approve a Document in Umoja SRM
- Course Summary
- Course Assessment
- Course Survey (optional)
# SC326: Umoja Low Value Acquisitions

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### Course Prerequisites

- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 126: Umoja Material Master Data Overview
- 110: Umoja Requisitioning Overview
- 201: Umoja ECC Navigation
- 202: Umoja SRM Navigation

### Umoja Enterprise Roles

- SA.07a SA Approver (Shopping Carts - IC/Consultants Contracts, LVA, and all others)
- SA.08 SA Low Value Acquisitoner

### High Level Overview

Umoja Low Value Acquisitions explains when and for what purpose Low Value Acquisitions are used, and details how to create a Low Value Acquisition.

### Modules

- **Course Introduction**
- **Module 1: Introduction to Low Value Acquisitions**
- **Module 2: Create Low Value Acquisitioning**
- **Course Summary**
- **Course Assessment**
- **Course Survey (optional)**
SC328: Umoja Contract and PO Creation

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</thead>
<tbody>
<tr>
<td>SA.03 SA Buyer</td>
</tr>
<tr>
<td>SA.06 SA Buyer Supervisor</td>
</tr>
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</table>

High Level Overview

Umoja Contract Management explains how to create a Purchase Order from a Shopping Cart or Solicitation, and outlines how to create a Contract from a Solicitation. This course describes how to edit a contract based on renegotiations or other criteria, and how to monitor the performance of a specific contract.

Also available as part of the Procurement Distance Learning Package (with Umoja Solicitations)

Modules

This course includes the following modules:

- Course Introduction
- Module 1: Contracts in Umoja
- Module 2: Create Contracts
- Module 3: Manage Purchase Orders
- Course Summary
- Course Assessment
- Course Survey (optional)
SC400: Umoja Distance Learning for Requisitioning

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**Course Prerequisites**
- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 104: Umoja Funds Management Overview
- 126: Umoja Material Master Data Overview
- 111: Umoja Procurement Overview
- 110: Umoja Requisitioning Overview
- 201: Umoja ECC Navigation
- 202: Umoja SRM Navigation
- 203: Umoja BI Navigation

**Umoja Enterprise Roles**
- SA.01a SA Requisitioner (Shopping Carts - goods/services excluding HR)
- SA.02 SA Requisitioner - Direct Procurement

**High Level Overview**

Umoja Distance Learning for Requisitioning includes a blend of self-study material and two virtual training sessions moderated by an Umoja instructor. This course describes the major steps of the Requisitioning process including creating and submitting a shopping cart, adding an item to a shopping cart, selecting the appropriate account assignments for shopping cart items, and saving and ordering a shopping cart. This course also outlines the required changes when procuring for services rather than goods.

Available as an ILT (SC318) and as a Distance Learning Package (SC400).

**Modules**

This course includes the following modules:

- Course Introduction
- Module 1: Intro to Requisitioning and Adding Items to Shopping Carts
- Module 2: Editing Item Details and Ordering Shopping Carts
- Module 3: Approving Shopping Carts and Procurement Documents
- Final Assessment

*Not available in Inspira yet*
Functional Area: Travel Management
TV155: Umoja Travel Overview

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102: Umoja Master Data & Coding Block Overview |
| Umoja Enterprise Roles | PA.01-.05 HR Partner (All, LS, UNV, UP & CIC) *  
PA.08-.11 HR Administrator (All, LS, NS & CIC)  
TV.01-.13 All Travel Roles |

* Not required for HR Partner All but recommended to understand upstream processes for HR Travel for their approval in this area. Status pending for other Partner roles.

High Level Overview

Umoja Travel Overview orients users to the Travel Portal functionality and navigation. This course will help users understand the impact of Travel Portal processes in their day-to-day tasks, the benefits of Travel Portal and ESS integration, and the inputs and outputs of Travel functionality. This course is prerequisite for taking the Level 2 courses.

Modules

This course includes the following modules:

- Course Introduction
- Module 1: Travel Overview
- Module 2: Travel Master Data
- Module 3: Travel Request
- Module 4: Travel Approval Process
- Course Summary
- Course Assessment
- Course Survey (optional)
## TV3142: Umoja Create Official Travel Request

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### Course Prerequisites
- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 201: Umoja ECC Navigation
- 211: Umoja Employee Self-Service (ESS) Basic Navigation
- 155: Umoja Travel Overview

### Umoja Enterprise Roles
- PA.04 HR Partner UP
- PA.05 HR Partner CIC
- PA.08 HR Administrator All
- PA.09 HR Administrator LS
- PA.10 HR Administrator NS
- PA.11 HR Administrator CIC
- TV.01-.13 All Travel Roles

### High Level Overview
The Create Official Travel Request course describes the official business travel request, reviews how to submit a travel request for approval, and how to manage travel requests.

### Modules
*This course includes the following modules:*

- Course Introduction
- Module 1: Official Business Travel Request Overview
- Module 2: Official Business Travel Request
- Module 3: Amendments
- Module 4: Travel Approval
- Course Summary
- Course Assessment
- Course Survey (optional)
## TV3144: Umoja Create HR and Entitlement Travel Request

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### Course Prerequisites

- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 155: Umoja Travel Overview
- 201: Umoja ECC Navigation
- 211: Umoja Employee Self-Service (ESS) Basic Navigation
- 3142: Umoja Create Official Travel Request

### Umoja Enterprise Roles

- PA.01-.05 HR Partner (All, LS, UNV, UP & CIC) *
- PA.08-.11 HR Administrator (All, LS, NS & CIC)
- TV.01-.13 All Travel Roles

### High Level Overview

The Create Travel Request – HR Travel and Entitlements course provides participants with the knowledge necessary to: create a HR travel request, create a TA for entitlements, submit a claim, and create the associated expense report.

### Modules

*This course includes the following modules:

- Course Introduction
- Module 1: HR and Entitlement Travel Request Overview
- Module 2: Create a HR Travel Request
- Module 3: Create an Entitlement Travel Request
- Module 4: Create an Expense Report
- Module 5: Approval Request Process

- Course Summary
- Hands-On Exercises
- Course Assessment
- Course Survey (optional)

*Not required for HR Partner All but recommended to understand upstream processes for HR Travel for their approval in this area. Status pending for other Partner roles.*
TV3145: Umoja Create Travel Request for Uniformed Personnel

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**Course Prerequisites**

- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 155: Umoja Travel Overview
- 201: Umoja ECC Navigation
- 211: Umoja Employee Self-Service (ESS) Basic Navigation
- 3142: Umoja Create Official Travel Request
- 3144: Umoja Create HR and Entitlement Travel Request

**Umoja Enterprise Roles**

- PA.04 HR Partner UP

**High Level Overview**

The Create Travel Request for Uniformed Personnel course provides participants with the knowledge necessary to: create a travel request for group travel, submit a claim, and create the associated expense report.

*Will be implemented in C5 as Distance Learning.*

**Modules**

This course includes the following modules:

- Course Introduction
- Module 1: Group Travel Request Overview
- Module 2: Create a Group Travel Request
- Module 3: Create an Expense Report
- Course Summary
- Hands-On Exercises
- Course Assessment
- Course Survey (optional)
## TV3146: Umoja Create Shipment Request of Personal Items

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### Course Prerequisites
- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 155: Umoja Travel Overview
- 201: Umoja ECC Navigation
- 211: Umoja Employee Self-Service (ESS) Basic Navigation
- 3142: Umoja Create Official Travel Request
- 3144: Umoja Create HR and Entitlement Travel Request

### Umoja Enterprise Roles
- PA.03-.05HR Partner (UNV, UP & CIC)
- PA.08-.11HR Administrator (All, LS, NS & CIC)
- TV.01-.13 All Travel Roles

### High Level Overview

The Create Shipment Request course enables participants to create a personal effects shipment request associated with a travel request. Additionally, participants will learn how to navigate the Personal Effects Shipment Requests page, submit an expense report for a personal effects shipment request, and determine the functionality of the approval process.

### Modules

**This course includes the following modules:**

- Course Introduction
- Module 1: Shipment of Personal Effects Overview
- Module 2: Personal Effects Shipment Request
- Module 3: Approval Request Process
- Module 4: Expense Report Creation Review
- Course Summary
- Hands-On Exercises
- Course Assessment
- Course Survey (optional)
TV3147: Umoja Process Expense Report

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### Course Prerequisites

- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 155: Umoja Travel Overview
- 201: Umoja ECC Navigation
- 211: Umoja Employee Self-Service (ESS) Basic Navigation
- 3142: Umoja Create Official Travel Request
- 3144: Umoja Create HR and Entitlement Travel Request
- 3146: Umoja Create Shipment Request of Personal Items

### Umoja Enterprise Roles

- PA.08-.11 HR Administrator (All, LS, NS & CIC)
- TV.01-.13 All Travel Roles

### High Level Overview

The Umoja Process Expense Report course is designed to provide information on: administering shipment notifications, creating shipping requisitions, approving purchase orders, validating shipment request information, and certifying shipment requisitions.

### Modules

This course includes the following modules:

- Course Introduction
- Module 1: Processing Shipments of Personal Items Overview
- Module 2: Shipment Request Notification Handling
- Course Summary
- Training Hands-On Exercises
- Course Assessment
- Course Survey (optional)
TV3148: Umoja Processing and Approving Travel Requests

**LMS Code**  
LMS-1957

**Duration**  
1 Day

**Delivery Method**  
Instructor Led Training (ILT)

**Level**  
Level 3

**Course Prerequisites**

- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 155: Umoja Travel Overview
- 201: Umoja ECC Navigation
- 211: Umoja Employee Self-Service (ESS) Basic Navigation
- 3142: Umoja Create Official Travel Request
- 3144: Umoja Create HR and Entitlement Travel Request
- 3147: Umoja Process Expense Report

**Umoja Enterprise Roles**

- TV.07: Travel And Shipment Approver
- TV.08: Travel Shipment Processor
- TV.09: Travel Processing Officer with SG/DSG/PGA
- TV.10: Travel Processing Officer no SG/DSG/PGA
- TV.11: Travel Claims Processor
- TV.12: Travel Ticket Processor

---

**High Level Overview**

Umoja Approving Travel Requests outlines how to process requests for Official Business Travel, Entitlements (Home Leave, Family visit, Education Grant, R&R), HR Travel and Group Travel. The user will be able to access and input Travel Master Data Work with Cost Centers (splitting across Cost Centers) and request updates to Travel Master Data.

---

**Modules**

*This course includes the following modules:*

- Course Introduction
- Module 1: Approving Travel Requests Overview
- Module 2: Review of the data and attachments entered
- Module 3: Work with cost centers and master data
- Module 4: Request updates, reject and approve travel requests
- Module 5: Overview of the post-approval process
- Course Summary
- Training Hands-On Exercises
- Course Assessment
- Course Survey (optional)
TV3149: Umoja Ticket Billing and Reconciliation

**LMS Code**  | **LMS-1958**
---|---
**Duration** | 1 Day
**Delivery Method** | Instructor Led Training (ILT)
**Level** | Level 3

### Course Prerequisites

- 101: Umoja Overview
- 102: Umoja Master Data & Coding Block Overview
- 155: Umoja Travel Overview
- 201: Umoja ECC Navigation
- 211: Umoja Employee Self-Service (ESS) Basic Navigation
- 3142: Umoja Create Official Travel Request
- 3147: Umoja Process Expense Report

### Umoja Enterprise Roles

- TV.11 Travel Claims Processor
- TV.12 Travel Ticket Processor

### High Level Overview

Umoja Ticket Billing & Reconciliation defines how to process payment in connection with travel, receiving, upload, validation and post payment.

### Modules

*This course includes the following modules:*

- Course Introduction
- Module 1: Ticket Billing & Reconciliation Overview
- Module 2: Create Travel Payment in the System
- Module 3: Invoice Reconciliation and Payment Validation Processes
- Module 4: Post-validation Processes
- Course Summary
- Training Hands-On Exercises
- Course Assessment
- Course Survey (optional)
TV3150: Umoja Travel Finance Integration

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<tr>
<td>TV.11 Travel Claims Processor</td>
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<tr>
<td>TV.12 Travel Ticket Processor</td>
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**High Level Overview**

This course describes the Travel and Finance Integration Process. It explains how Travel Portal processes will impact other modules in Umoja, as well as the benefits of the Travel Portal, ESS and ECC integration. Inputs and outputs of Travel functionality are also reviewed. The purpose of this course is to provide participants with an overview of the Travel Expense and Finance Integration, including Processing Expense Reports, Reviewing Postings and Special Payments.

**Modules**

This course includes the following modules:

- Course Introduction
- Module 1: Processing Travel Claims Overview
- Module 2: ECC Travel Claims Review Process
- Course Summary
- Course Assessment
- Course Simulation
**TV3151: Umoja ESS for Travel Management**

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### Course Prerequisites

| 101: | Umoja Overview |
| 102: | Umoja Master Data & Coding Block Overview |
| 155: | Umoja Travel Overview |
| 201: | Umoja ECC Navigation |
| 211: | Umoja Employee Self-Service (ESS) Basic Navigation |

### Umoja Enterprise Roles

TV 01-10: Travel And Shipment Administrator All with SG/DSG, Travel And Shipment Administrator All no SG/DSG, Travel And Shipment Administrator UNV, Travel And Shipment Administrator UP, Travel And Shipment Administrator NS, Travel And Shipment Approver, Travel Shipment Processor, Travel Processing Officer with SG/DSG/PGA, Travel Processing Officer no SG/DSG/PGA

### High Level Overview

This course was created as the Instructor Lead Training equivalent for Umoja Create Official Travel Request (TV3142), Umoja Create HR and Entitlement Travel Request (TV3144), Umoja Create Shipment Request of Personal Items (TV3146) and Umoja Process Expense Report (TV3147).

*ILT option for those mapped to the following Travel CBTs: TV3142, TV3144, TV3146, TV3147. Completion of this ILT can be done in lieu of the four CBTs.*

### Modules

*This course includes the following modules:*

- Course Introduction
- Course Modules (relevant to each included CBT)
- Course Summary
- Course Assessment
- Course Simulation
Treasury & Cash Management
# FI105: Umoja Cash Management and Treasury Overview

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## Course Prerequisites

- **101:** Umoja Overview
- **102:** Umoja Master Data & Coding Block Overview

## Umoja Enterprise Roles

- **BP.02** BP Maintainer Third Party - Bank Data
- **BP.04** BP Maintainer Commercial - Bank Data
- **BP.06** BP Maintainer Individual - Bank Data
- **BP.11** BP Approver Global - Bank Data
- **TR.02** TR Bank Signatory
- **TR.03** TR Cashier

## High Level Overview

Umoja Cash Management and Treasury Overview introduces Cash Management within the Umoja solution. This course explains the roles played by the Treasury and the Cashier’s Office and examines how these roles will change with the implementation of Umoja.

This course will also identify the global implications of the changes to Treasury and Cash Management in the field. It incorporates the Master Data elements associated with this process and reporting capabilities through Umoja Business Intelligence (BI).

## Modules

*This course includes the following modules:*

- Course Introduction
- Module 1: Introduction to Cash Management in Umoja
- Module 2: Cash Management and Treasury Master Data
- Module 3: Cash Management and Treasury Processes
- Course Summary
- Course Assessment
- Course Survey (optional)
## FI322: Umoja Payment Processing (Cashiers)

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### High Level Overview

Umoja Payment Processing describes how to process incoming and outgoing payments for cash or cheque receipts. This course explains how to manually reconcile prior day bank statements against operational and treasury transactions and how to execute payment processing reports.

### Modules

*This course includes the following modules:*

- Course Introduction
- Module 1: Process Outgoing Payments in Umoja
- Module 2: Process Incoming Payments
- Module 3: Daily Reconciliation of Bank Transactions
- Course Summary
- Course Assessment
- Course Survey (optional)