



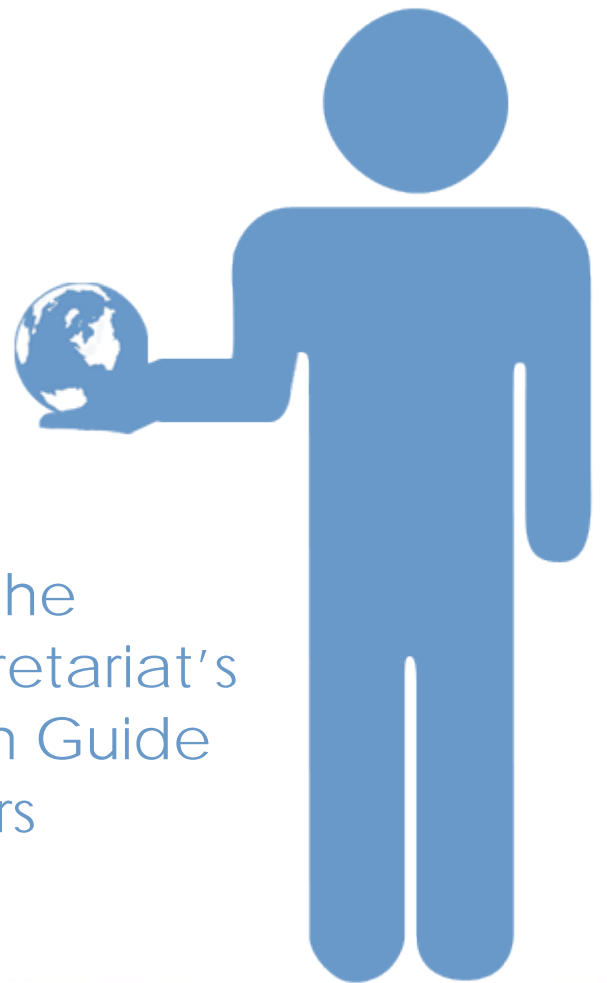
United Nations

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UMOJA CHANGE  
DISCUSSION

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SUPPORTING CHANGE  
IN THE UN SECRETARIAT  
SEPTEMBER 2016



Welcome to the  
United Nations Secretariat's  
Change Discussion Guide  
for Managers

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## PREPARING TO HOLD CHANGE DISCUSSIONS

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**A Message from Ms. Carole Wainaina  
Assistant Secretary-General  
Office of Human Resources Management**

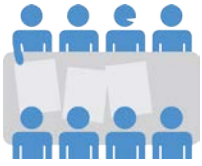
Stewarding change through an organization can be a difficult task. When new processes, systems, and solutions are introduced, fears about training, job security, and roles are only natural and thus hesitation and/or resistance are to be expected. As managers our role is to engage with staff preparing them for the realities of transitioning during a major change. This guide contains information to enable you to hold structured discussions with your team on the changes that the Umoja solution will bring to the United Nations Secretariat and to all UN staff and personnel.

This guide has been developed to support and assist you by providing step-by step guidance on how to conduct change discussions with your team. Each session should be conducted by the manager in person and is expected to take approximately one hour.

Change in the workplace can be intimidating to discuss, and a familiar setting will help you and your staff feel more at ease.

Thank you.

Carole Wainaina  
Assistant Secretary-General  
Office for Human Resources Management



## How the change discussions should be conducted across the Secretariat

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We encourage you to use the cascading model in your change discussions to ensure that each manager has participated in the session with her/his manager prior to conducting the discussion with his/her own team.

1. Under Secretaries-General and other heads of department will host change discussion sessions with their direct reports.
2. Assistant Secretaries-General will host change discussion sessions with their direct reports.
3. Directors and P-5/4 level staff members will host change discussion sessions with their direct reports.
4. P-5/4 level staff members who manage teams will host change discussion sessions with their direct reports, if their direct reports were not already included in the Director / P-5/4 led discussions.
5. If you have a small team (i.e. three or four people) then you should join with the manager you report to facilitate a joint discussion.
6. For those staff who may be the most impacted, it is important that sufficient flexibility is allowed to hold discussions at the most appropriate level. This may not necessarily be an immediate supervisor but perhaps a manager at a higher level, depending on the size of the Mission or Office where the person is located.



## Planning and preparing for your change discussion session

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Prior to conducting the change discussion session with your staff, review the Change Discussion Tools on the Umoja Field Support website [here](#).

The main objectives of this change discussion are:

1. Enable every team to develop an accurate understanding of the changes coming to the Secretariat with the implementation of Umoja, and how ESS and MSS will change the way we work; and
2. Provide every team with an opportunity to ask questions and raise concerns about the forthcoming changes in a neutral, safe environment created by their supervisor.



## Your role in the discussion

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The change discussion session is designed to provide an opportunity to discuss what changes in our work activities and behaviours means in a context that is realistic for your team as Umoja is rolled out in your entity. As the manager, you need to use the “Case for Change” tools in the Individual’s and Manager’s tool kits to enable your team to develop an accurate understanding of exactly how the changes associated with Umoja will affect them and their work. As the facilitator of the discussion, you are responsible for guiding the session, asking questions, and engaging your team. Remember that your role is to guide the learning experience in a way that allows your team to arrive at important understandings on their own – not to tell them what to think.

These team discussions often result in subsequent conversations, which are to be encouraged. Be prepared for members of your team, either as individuals or perhaps in groups to approach you with questions or concerns. In such instances, you should not try immediately to further explain the 'official' case for change but are reminded to explore their questions/concerns by asking open-ended questions. Open-ended questions begin with words such as "Who," "What," "Why," or phrases such as "What do you think about ...?".



## Pre-discussion checklist

Estimate Timeline	Task
<b>2 weeks ahead of Change Discussion</b>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Confirm logistical details (i.e. Reserve the room / location)</li> <li><input checked="" type="checkbox"/> Invite your team to the session, noting that attendance is mandatory</li> </ul>
<b>1 week ahead</b>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Review the UN Change Discussion Guide for Individuals and Managers available on the <a href="#">Umoja Field Support</a> website</li> <li><input checked="" type="checkbox"/> Select the scenarios (under Appendix B) which will be most relevant for your staff: <ul style="list-style-type: none"> <li>◆ If your direct reports are managers, choose one MSS and one ESS scenario</li> <li>◆ If your direct reports are staff only, choose the two ESS scenarios</li> </ul> </li> <li><input checked="" type="checkbox"/> Consult your manager if you have questions or require further clarification regarding the materials or the change discussion.</li> </ul>
<b>1-3 days ahead</b>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Send a reminder to your team about the date and time for the session</li> <li><input checked="" type="checkbox"/> Print materials you will provide (i.e. copies for staff of the selected scenarios)</li> <li><input checked="" type="checkbox"/> Confirm room and equipment readiness</li> <li><input checked="" type="checkbox"/> Order refreshments, if applicable</li> </ul>



## Discussion Plan

You should lead the session as follows:

Section	Activities	Materials	Time
1. Introduction	<ul style="list-style-type: none"><li><input checked="" type="checkbox"/> Participants sign in</li><li><input checked="" type="checkbox"/> Explain why the UN is conducting the change discussions</li><li><input checked="" type="checkbox"/> Review the session agenda</li></ul>	<ul style="list-style-type: none"><li><input type="checkbox"/> Participant sign-in sheet (Appendix A)</li><li><input type="checkbox"/> Opening Remarks</li></ul>	10 minutes
2. Opening Activity	<ul style="list-style-type: none"><li><input checked="" type="checkbox"/> Read the Umoja mission statement</li><li><input checked="" type="checkbox"/> Discuss what Umoja means to your team</li></ul>	<ul style="list-style-type: none"><li><input type="checkbox"/> Umoja Mission statement</li><li><input type="checkbox"/> Your Case for Change</li></ul>	10 minutes
3. ESS scenario	<ul style="list-style-type: none"><li><input checked="" type="checkbox"/> Review ESS scenarios</li><li><input checked="" type="checkbox"/> Consider the impact of the situation on the staff involved</li><li><input checked="" type="checkbox"/> Discuss key points as a group</li></ul>	<ul style="list-style-type: none"><li><input type="checkbox"/> ESS scenarios (Appendix B)</li></ul>	15 minutes
4. MSS scenario (if applicable)	<ul style="list-style-type: none"><li><input checked="" type="checkbox"/> Review MSS scenario (if applicable)</li><li><input checked="" type="checkbox"/> Consider the impact of the situation on the managers and individuals involved</li><li><input checked="" type="checkbox"/> Discuss key points as a group</li></ul>	<ul style="list-style-type: none"><li><input type="checkbox"/> MSS scenarios (Appendix B)</li></ul>	15 minutes
5. Reaffirming Key Points	<ul style="list-style-type: none"><li><input checked="" type="checkbox"/> Read the Umoja mission statement again</li><li><input checked="" type="checkbox"/> Read your Case for Change again</li><li><input checked="" type="checkbox"/> Discuss whether your team's perception of Umoja has changed from the beginning of the session</li><li><input checked="" type="checkbox"/> Hand out the ESS / MSS Roadmaps</li></ul>	<ul style="list-style-type: none"><li><input type="checkbox"/> <a href="#">ESS/MSS</a> Roadmaps (Available on the <a href="#">Resources</a> tab of the Umoja website)</li><li><input type="checkbox"/> Your Case for Change</li></ul>	5 minutes
6. Conclusion	<ul style="list-style-type: none"><li><input checked="" type="checkbox"/> Closing comments and questions</li><li><input checked="" type="checkbox"/> Thank staff for attending</li></ul>	<ul style="list-style-type: none"><li><input type="checkbox"/> Closing remarks</li><li><input type="checkbox"/> Collect sign-in sheet</li></ul>	5 minutes

**A Message from Mr. Yukio Takasu  
Under Secretary-General  
Department of Management**

Welcome to this session to discuss the changes associated with Umoja.

As United Nations staff and non-staff personnel, we are called upon by our Charter to uphold the highest levels of efficiency, competence and integrity. This commitment is reflected in our Oath of Office, which we take when we begin working for the UN. In order to live up to this commitment, the UN Secretariat is adapting and changing to align with constantly evolving global standards. People are central to the efficiency and effectiveness of the UN's work and the successful delivery of our mandates. With the deployment of Umoja, we will be positioned to build a more efficient and cohesive UN Secretariat by better management of our people and other resources.

Many of the UN Secretariat management reforms reflect changes taking place in organizations worldwide in both the public and private sectors. One of the major reforms taking place in the Secretariat today is the deployment of the new Enterprise Resource Planning (ERP) system known as Umoja, which includes:

1. Improved oversight, and reporting capabilities
2. More automated and paperless processing of administration
3. Consistent standards in one global system
4. Simplified approval procedures and self-certification

The purpose of today's discussion is to provide a better understanding of the changes ahead, as we embark on the journey to a new way of working through Umoja. The ability to overcome challenges as we go forward is important on both an individual and organizational level.

The Secretary-General has asked all of us to engage in a structured discussion so that we can all acquire a common understanding of the changes that Umoja will bring. I encourage you all to participate fully in this discussion and to feel free to ask questions. If you do not feel comfortable asking questions in front of others, please speak to your manager after this session or if you prefer to speak with another colleague, such as those based in your local HR or Executive Office, please do so.

As I have already participated in this discussion with my manager, I have expressed my own questions and concerns. I hope you will also find this opportunity to raise your own queries with your manager informative equally useful.

Thank you.

Yukio Takasu  
Under Secretary-General  
Department of Management



**STEP 1:** As participants arrive, ask them to sign in using the form provided.



**STEP 2:** At the scheduled time for the session to begin, greet your team, and thank them for attending.



**STEP 3:** Read (or ask someone to read) the Letter from the Under-Secretary for Management.



**STEP 4:** Explain the plan for the session.

For the rest of the session, we will:

- ◆ Review and discuss the changes associated with Umoja;
- ◆ Perform an opening activity to better understand Umoja and the new ESS / MSS Portals;
- ◆ Consider some scenarios (chosen at the manager's discretion) as a group;
- ◆ Discuss the implications of Umoja, based on the scenario(s); and
- ◆ Conclude with final remarks



**STEP 5:** Begin by asking your team if there were one thing they wish they could manage via their computer rather than through the local HR office (such as entitlements, time and attendance, etc.), what would it be?

Give your team several minutes to think about it. Usually, a few people will speak up. If necessary, describe how you think the entitlements process (i.e. annual leave or travel requests) or the time management process could be made easier; ask if someone else has a similar example. If not, move on to the next session. If so, invite them to share their example. Once your team member has finished describing her or his example, move on to the next section.



**STEP 6:** Once you have finished reading the Letter, bring Umoja to the level of your team by reading the case for change that you have developed using the Individual and Manager Tools for Change. Then discuss the following questions:

- Q: Can you summarize the importance of Umoja to the UN and/or our team's case for change in your own words?
- Q: Why do you think the UN is implementing Umoja?
- Q: What changes do you think Umoja will bring to our team?
- Q: How do you think your everyday tasks will change as a result of Umoja?
- Q: How do you think Umoja will improve our performance as a team?



**Key points that may be raised (or you should cover in your summary) include:**

1. Umoja will increase organizational efficiency by reducing the amount of time spent on manual processes, thus enabling people to focus more on high priority and value-added work.
2. Umoja will provide a system that captures accurate and timely data from the global Secretariat at all duty stations, including peacekeeping and other field missions, for greater visibility and reporting.
3. Umoja will reduce the average time required for staff, managers, and HR personnel to process routine work by streamlining, integrating and automating key business processes.
4. Umoja will bring a shift to self-certification and consistency with the ESS and MSS portals, where staff and non-staff personnel and managers will now enter their data and submit all personnel requests through one centralized system

**After participants have had a chance to discuss the Umoja mission statement, and what this change means to them, they are now going to discuss how they will use Umoja in real life situations, what processes may be changing as a result of the new system and how the Organization could change accordingly by examining some common scenarios.**

**Explain that the scenarios are based on real processes that occur today in duty stations across the world.**



## Instructions for staff and non-staff personnel scenarios

If you are using only one of the two ESS scenarios, select the one that you believe will be of greatest interest and relevance to your team. We recommend selecting the scenarios in advance of the session, and having printed copies of the scenarios and questions that follow to hand out during the discussion.

The process for leading the team discussion is:

1. **Introduce the scenario:** Each scenario includes a small introduction that you can read or paraphrase.
2. **Review:** Read the scenario aloud to your team or ask someone to read it.
3. **Ask questions:** Each scenario has two questions. Ask a question, and allow staff to discuss it fully before moving on to the next one. These questions should be asked in order, as they are designed to guide the discussion.
4. **Wait:** Give your team time to consider each question and potential answers. It may take up to a full minute for a person to hear a question and formulate an answer. Ask for volunteers to offer their thoughts.
5. **Inquire:** In the event your team has still not offered their perspectives and answers, ask if any of them has personally experienced the scenario before, whether the experience was similar to what is presented in the scenario their response.
6. **Conclude:** Once you have discussed each of the scenario questions, conclude the discussion by reviewing the key points. If people are still actively discussing, say, "Let's hear one or two more comments before we close out this scenario."

The scenarios on the following pages have been divided into one intended to be discussed with managers, and two designed for staff. If your direct reports include managers, you should choose one scenario for ESS and one for MSS. If your direct reports do not include managers, then choose both scenarios for ESS. Each scenario is designed for 15 minutes; however if the discussion of the first scenario is especially valuable, you may choose to spend more time on it. If you do not finish all the material by the time your session ends, that is okay. The point is to lead a meaningful discussion with your team.

Solicit advice and opinions from participants. Be aware that some participants will be more comfortable than others speaking in front of the group. You should encourage the quieter members to participate by asking them to offer their views on the scenario being discussed.

For the MSS scenario only: in the small group discussion with managers, be prepared to answer questions the small groups may ask. After the small groups have discussed the case, ask them to share their analysis with the entire group. You should encourage participants to ask questions of each other, but remember to give each group a chance to present.

The table below lists each scenario which follows:

Scenario #	Name of Scenario	Audience	Key Function of Umoja
1	Submitting a Travel Request	All Staff	ESS
2	Updating Dependants	All Staff	ESS
3	Requesting a Contract Renewal	Managers	MSS

You should post the scenarios you choose to discuss on a screen or hand out copies to the group.



## Employee Self Service Scenario 1

### Submitting a Travel Request



#### STEP 1: Read or paraphrase the lead-in to the scenario for staff:

Timely submission and processing of travel requests are essential to how we work in a global organization like the UN; a smooth process that works equally well for staff and managers alike is vital. Then look at an example of how submitting a travel request works today, and how it will work in the future with Umoja.



#### STEP 2: Read the scenario:

1. Before Umoja, travel requests had to be submitted and processed manually by completing a paper form. Then you had to follow up on the status of the request and wait for a colleague in an EO or equivalent to enter the data in the system. Generally, it was difficult to know what the status of the request was throughout the process.
2. With Umoja, once you log on to the ESS portal, select the type of travel e.g. official travel, you will see certain information such as general conditions/guidelines/policies applicable to travel. This may also include the need for medical and security clearance, visa, passport validity. Plus quick links to the official travel Rules, AIs etc. Once you have read and understood the requirements, you should acknowledge your understanding and then follow the on-screen steps to complete your request.
3. Once you have submitted your travel request, Umoja automatically performs various tasks including a funds availability check; a request for Medical Clearance (as applicable); a request for Security Clearance in draft status is also sent to TRIP. The user will need to log in to finalize the submission of the request as mandatory information, such as the destination contact details or certain flight details, may not be known yet. The onus to obtain clearance prior to departure is on the user. Once the request has been certified/ approved, the user is ready to travel.

4. Upon return from travel the user logs on to their ESS home page, opens the travel section, selects submission of an expense report (travel claim) and associates the data with the travel request. The exact itinerary is also recorded.

At any time during the process, you can check the status of the request or claim. The system will reflect travel status in the travelers' 'work centre' (type of 'inbox') e.g. submitted to Certifying Officer for approval. Umoja will ensure that the process of submitting, monitoring and tracking requests is a more straightforward experience for all users.



## Employee Self Service Scenario 2

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### Submitting a 'Maintain family Status' Request



#### **STEP 1: Read or paraphrase the lead-in to the scenario for staff:**

Life and work events (marriage, divorce, birth of a child etc.), which may change our family status, occur at irregular intervals. For many of these events, it is important that we update our personal information. Currently, the process for updating personal information due to a life or work event varies by location or office. With the ESS Portal, Umoja will bring forth a standardized process for all users.



#### **STEP 2: Read the scenario:**

5. Staff will use ESS to update personal and work related data as a result of a Life or Work event and to access a comprehensive set of guided procedures for all the individual transactions and processes that may be applicable to the event. More cohesive cross-functional transactions lead to standardized service delivery.
6. Today, although staff have access to information on benefits and entitlements via the intranet such as iSeek or the HR Handbook, they may not readily understand the interrelationships to a particular Work or Life event and therefore may fail to take the necessary actions either to submit a request and/or to comply with the reporting requirement. They must research or identify the relevant transactions and initiate the necessary processes manually, one at a time.
7. There will now be streamlined and standardized processing of benefits and entitlements across the Organization through the availability of a set of guided procedures in the system.
8. Timely and more accurate updates of personal and work related information will lead to fewer retroactive actions and cleaner data. Staff will no longer be unsure of the duration required to complete a personal information change request, unlike today, where the process varies across duty stations and offices. ESS will also eliminate printing, signing, mailing, photocopying and storing/filing of forms and supporting documentation.

Repetitive and manual entries for the same type of HR data will go away. The latest data entered by the staff member in the system will be used across all transactions applicable to the Work or Life event. There will be no need to enter the same data on different manual forms to apply for payment of benefits and entitlements.



## Manager Self Service Scenario 2

### Submitting a Requesting for Contract Renewal

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#### **STEP 1: Read or paraphrase the lead-in to the scenario for Managers:**

Contract Renewals are very important for resource planning and allocation in the UN Secretariat. As managers, it is our responsibility to decide whether or not to extend a staff member's contract at our duty station. Let's look at an example of how contract renewal works today, and how it will work in the future with Umoja.



#### **STEP 2: Read the Manager scenario:**

#### **Key Points – In the discussion, make sure you address the following key points:**

1. The way Contract Renewals are submitted and approved today is inefficient because the HR Assistant needs to run a report to identify which staff members' contracts will soon expire and notify their managers. The manager must then manually fill out all of the necessary paperwork, and submit it in order for the contract renewal to get approved. Unless notified by HR, or by proactively checking the staffing table, the manager has no way of knowing the contract is about to expire. This makes strategic resource planning challenging.
2. There is no way for the staff member or the manager to track the progress of a contract renewal and if the manager does not submit the contract renewal before the staff member's contract expires, the staff member has to worry about payroll, relocation, and dependent implications.
3. With MSS, managers are automatically notified when a staff member's contract is about to expire. The manager can look at the contract and funding information to decide whether to extend a staff member's contract. Then the manager can submit the contract renewal details into the system, and if this is a second or third time renewing the same staff member's contract, the renewal forms will be prepopulated with existing data. This will save the manager considerable time and effort.
4. The staff member does not need to worry about their contract expiring, since the manager is notified of this, and can therefore focus on more pertinent duties and mandates in their daily work.

MSS saves the staff member, the manager, and the HR Assistant time and effort in identifying when a contract is about to expire, and in submitting the contract renewal. All the information required is readily available and accountable in the system, so managers will now have better visibility into the status of their staff members and where they are deployed at all times.



## Closing Umoja Activity

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**STEP 1:** Before closing the session, you may wish to invite your team to raise questions they may have about the impact of Umoja on staffing at the Secretariat. If those questions come up earlier in the session, assure the team that you are planning to discuss them after you have discussed the Umoja in terms of the impact and benefits it is likely to have for the team.

**STEP 2:** You should make the following points regarding the impact of Umoja:

### Positive impact of Umoja

- ◆ Umoja changes the way we perform a wide variety of administrative activities. It puts the focus on the staff member to be responsible for initiating actions (e.g. applying for benefits) and managing their own personal information.
- ◆ It should help staff by reducing the time required to process their requests and obtain their entitlements.
- ◆ Staff will spend less time on mundane everyday tasks like time & attendance.
- ◆ Umoja will reduce the amount of paperwork that staff use to process manually.
- ◆ Staff can check the status of their applications/requests and know that their paperwork will not get lost.
- ◆ Wherever staff serve, they will no longer need to learn new procedures, as Umoja will ensure consistency across the global Secretariat.

### Possible impact of Umoja on staffing

- ◆ *Full implementation of Umoja will not be complete until 2017. Until that time we cannot know the exact impact it will have on staffing.*
- ◆ *We will not be able to assess staffing needs until Umoja is up and fully functional in a specific area – this will take one to two years after Umoja has been introduced in the area.*
- ◆ *We know from the experience of other organizations that Umoja will create new jobs – ones that may not exist in the organization today.*
- ◆ *Staff who work on manual processes are most likely to be impacted but exactly what those impacts will be cannot be fully predicted in advance. Post-implementation impact analysis will be conducted, to yield more detailed information.*
- ◆ *We are committed to mitigating the negative impact of Umoja on staff as much as possible through attrition. We are also committed to providing colleagues who are impacted with learning/re-training opportunities to help them find new jobs*
- ◆ *Once known, the Secretariat will make information regarding staffing impacts of Umoja available as soon as is practically possible.*



**STEP 3:** After concluding the scenarios, direct everyone’s attention back to the letter from the Under-Secretary for Management, and read it aloud again:

*Insert Letter from Under-Secretary for Management*



**STEP 4:** Once you have finished reading the Letter, pose these questions to the group, and discuss each one in turn.

Q: Do you feel differently about Umoja and ESS / MSS now that you’ve participated in this session?

Q: Are there any concerns that you still have about the changes coming to the Secretariat?

Q: What are some benefits you think ESS / MSS will bring to your work?



**STEP 5:** As you conclude the discussion, hand out the ESS / MSS Roadmaps and the Quick Guide. Read or paraphrase the following wrap-up:

Here are some Umoja ESS / MSS materials that will help you to understand more about Umoja as well as the new portals and the changes they will bring. Throughout this change, there will be support provided to you to ensure that you are well-equipped to successfully use ESS / MSS portals when they are implemented. If you have any questions, feel free to reach out to me, as I can assure you that this is not the last discussion we will have on the upcoming changes, nor your last opportunity to ask questions and voice concerns.

## CLOSING THE CHANGE DISCUSSION

**Thank your team for their willingness to engage in an important discussion**

**Read or paraphrase the following final remarks:**

Thank you for participating in the discussion today. I hope this was useful, thought-provoking, and enjoyable.

Organizational and technological changes do arise in the workplace; and we will all be confronted with them at one point or another. When they happen, it is important to (1) understand why they are happening, (2) realize how your role will change because of them, (3) acknowledge the potential challenges you may face, and (4) focus on what the benefits will be to you individually and to the organization as a whole. If you are not clear on any of these questions, ask someone. Ask me, or the Executive Office, or OHRM. We are here for you to explore your questions and doubts, so you can better embrace the change and excel through it. Before we close the session, are there any final questions?

**Take any final questions**

**Close the session**

## CHANGE DISCUSSION APPENDICES

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- a. Appendix A: Change Discussion Sign-In Sheet
- b. Appendix B: Scenario Handouts



## Appendix A

### Change Discussion Sign-In Sheet

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Date of Session:

Discussion Leader:

Department

Office/Mission

- |     |     |
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| 1.  | 15. |
| 2.  | 16. |
| 3.  | 17. |
| 4.  | 18. |
| 5.  | 19. |
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## Employee Self Service Scenario 1

### Travel Request



# Submitting a Travel Request

**1** Jane Doe travels frequently on official business. As she was about to submit her travel request in Umoja for the first time, she realized just what a difference the new way of working had made.

Multiple forms & signatures are a thing of the past!

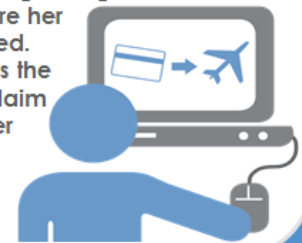


Recalling what she would have done to submit a travel request in the past, she realized how much more efficient this process had become with Umoja.

**2** Jane is a mid-level manager. In the past, much of her travel documentation was prepared for her. But even still, this had meant compiling multiple documents and acquiring multiple signatures from various colleagues. Now, Jane can handle much of the process herself. She just logs on to the Employee Self Service or ESS portal in Umoja, selects the type of travel, i.e. official travel and then simply clicks through all the relevant fields from there. Once she has inputted all the required data, Jane either reviews what she has entered for immediate submission or saves it until later.

**3** Umoja then automates the next steps of the process by initiating certain elements such as confirming funding availability and instigating medical /security clearances (as necessary). Jane can monitor and track the process 24/7. The convenience of the new system has impressed her! Concurrently, the Certifying Officer will review and approve or reject the request. When the Travel Office has also approved, a system-generated payment is sent to Jane's bank account. Meanwhile, she will be sure to log in to UNDSS to finalize any mandatory information i.e. contact details at her destination and submit her security clearance request. She will also liaise with her UN Medical Office and confirm all necessary clearances have been obtained.

**4** Jane told Sam she couldn't believe how easy the new process has made things for her. She found it to be so straightforward and painless! When Jane returns from her trip, she will log on to ESS again and submit an expense report by clicking through all the necessary steps to ensure her travel request is submitted. Umoja will either process the request as an express claim or send it to Sam if further review and approval is required.





## Employee Self Service Scenario 2

### 'Maintain Family Status'



## Submitting a 'Maintain Family Status' request

**1** Jennifer has just had a second child. She remembers the time when she had her first baby and that she had to notify the UN about her new family member for health insurance and dependency allowance purposes. She also knows that she has to submit supporting documents such as an official letter from the hospital and the child's birth certificate.



In the past, when she added her first child as a family member, Jennifer was required to personally visit both the HR office and the Insurance Section within 31 days of giving birth. In each office, she then had to complete forms with her information and also that of her child. In addition, Jennifer had to present the child's birth certificate and a letter from the hospital or discharge papers, which were copied for the file by her local HR Officer. She thought this was excessive at the time.

**3** Umoja then automates the next step of the process by forwarding Jennifer's request to the relevant HR Partners (Personnel Office/HR Officer) who will review and approve (or reject) the request depending on whether there are any discrepancies. Jennifer can monitor and track the progress of her request 24 hours a day, seven days a week. Once her request is approved, Jennifer will receive an email notification from Umoja summarizing the status of her request. For cases of dependency, a link to the related personnel action will also be included which can be retained for Jennifer's records.

**2** With Umoja, the procedure has changed. Jennifer can log on remotely to the Employee Self Service (ESS) portal and via two links - "Life and Work Events" and "Benefits"; she can easily notify the relevant parties, upload supporting documents and even leave remarks/queries related to her request. Once Jennifer has inputted all the required data, she can review it and submit her request for processing online. Now, she only has to go her HR Office once to submit original documents for verification before the request is approved by HR. Best of all, she no longer has to complete any forms or make copies!



**4** Jennifer was thrilled with the new process and how easy it was to use the ESS portal; she was able to tell colleagues that it was a much faster and more convenient way to handle dependency matters.



## Manager Self Service Scenario 3

### Contract Renewal



# Submitting a Request for Contract Renewal

1

Yussef manages over 200 staff members and consequently, relies on both his Administrative Assistant and additional support mechanisms, such as the Executive Office/HR Office (EO/HRO), to manage administrative matters such as contract renewal, time and attendance and completion of e-Performance. Previously, Yussef was notified by the EO/HRO regarding staff whose contracts were due to expire which required recommendations for extension. A formal recommendation had to be issued to confirm funds and for approval. This initiated a personnel action. He would then inform staff to visit the EO/HRO to sign their new Letter of Appointments (LOAs). Yussef always thought this process was cumbersome. After issuing his recommendations, he was 'out of the loop'. It was difficult to track the status of contract renewals and to keep his staff informed.

2

Initially, Yussef was unsure about Umoja's Manager Self Service (MSS), especially having to deal with a new system. He feared having additional duties too. But, as he was already frustrated with previous procedures, this change could only be a good thing. After training, Yussef began to appreciate the improvements MSS was bringing to staff administration. Reliance on others is reduced; contract information is readily accessible; he receives automated notices regarding expiring contracts and can print related reports. Yussef now logs into MSS whenever he wishes. Under his 'worklist', he can see his staff together with their contract and funding information – all in one space!



3

Another great feature is no more hard copy recommendations are needed with this automated process. Yussef now processes contract renewal recommendations - for an individual or for several staff members at one time – online. This is less time-consuming and makes tracking requests much easier. Today, Yussef can better control his staff administration, making succession planning easier too. Umoja sends recommendations to the HR



Partner (Personnel Office / HR Officer) and confirms funding. The staff member is notified, copying Yussef, so they know to certify their contract renewal and sign their LOAs online. Yussef now follows the status of extensions to update his staff.

4

While discussing MSS with another manager, Yussef noted how efficient MSS instead of the former process, which was offline and less transparent. He feels more involved in staff administration overall and acknowledges that access to contract and funding information has improved his ability to plan work schedules and track staff movements – a great change for the better!

1