NV211 - Umoja Employee Self Service Portal (ESS) Basic Navigation

Agenda

Course Introduction
Module 1: Umoja Employee Self Service Navigation Fundamentals
Module 2: Umoja Employee Self Service Functionalities
Course Summary
Course Assessment
Course Survey

Course Overview

The purpose of the **Umoja Employee Self Service (ESS) Basic Navigation** is to explain Umoja portal navigation fundamentals, as well as related concepts and terms that are new to the Umoja users.

All persons with Umoja Enterprise roles need to take this course.

Prerequisite Review

You should have completed the following prerequisite courses:

- Umoja Overview
- Other Level 1 courses required for the user's role

Course Duration: 2 hours

Course Objectives

After completing this course, you will be able to:

- Navigate the Umoja Employee Self Service (ESS) Portal.

- Identify the different screen menus and functionalities.

- Explain the additional features offered by Umoja Portal

Agenda

Course Introduction
Module 1: Umoja Employee Self Service Navigation Fundamentals
Module 2: Umoja Employee Self Service Functionalities
Course Summary
Course Assessment
Course Survey

Module 1 Objectives

After completing this module, you will be able to:

- Log on to Umoja Employee Self Service Portal

- Describe the Umoja Portal screen layout

- Identify and use the different menus in Umoja Employee Self Service Portal

- Recognize the different types of system messages

Key Terminology

Key Term	Description
Umoja ESS	Employee Self-Service portal: The front end tool used to provide access to end-users to update their personal information, request services and view their own data. All staff will have ESS access while non-staff may have limited access.
Umoja MSS	Manager Self-Service functionalities: End users with manager roles can login to the Umoja Self Service Portal and access information, through dedicated areas, as well as perform tasks that will automatically trigger workflows to other parties such as HR Partners, update records in the ERP Central Component (ECC) system or send notifications (for example time approvals).
Business Process Flow	Business Process Flows drive users through the sequence of tasks within a defined end-to-end process. Business process flows are comprised of steps that must be completed sequentially, including sub-steps that may be optional. Depending on a user's role, the steps available can involve requesting actions, or reviewing and approving submitted actions.

Key Terminology

Key Term	Description
Workflow	Automatic routing of a document (or request) from one user to another user with a different role, who can perform different actions in the system. In a typical workflow step the document created by a User (Staff Member) is directed to his/her specific Approver (Manager or HR Partner). The workflow generally generates approval tasks and/or email notifications to the next person (or role) in the sequence. It is possible to track the status of an activity based on when the approver (or other role) takes action on the specific work item.

Getting Started

The Umoja Employee Self Service (ESS) Navigation course utilizes simulations to guide you through the fundamentals of getting around the Umoja portal to complete relevant processes.

- All Staff Members of the UN Secretariat are automatically granted the ESS-Staff Umoja Enterprise Role, which will allow them access to the Umoja production system.

- Some Staff Members may be mapped against additional Enterprise Roles in the Umoja Portal (i.e. HR Partner, Time Administrator, Travel and Shipment Processor, etc.), which will grant them additional access to perform their work.
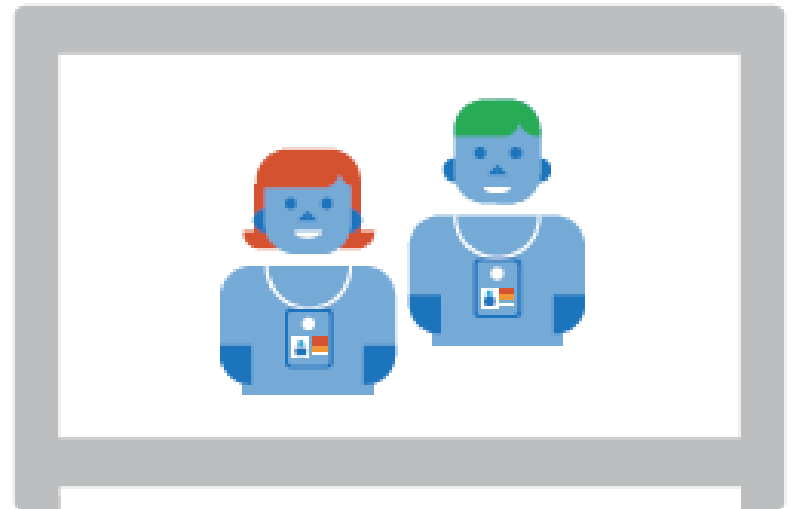
Getting Started

- Staff Members required to approve transactions in the Portal are generally referred to as Approvers or Managers and the combination of their functions and accesses in the Umoja Portal is called Manager Self Service (MSS).

- Practically, Approvers access the Portal from the Employee Self Service logon just like any other employee. However, along with the common functionalities that will be described in this course, they will be able to navigate to tabs and Area Pages containing links to their approval actions.

- Functionalities performed by Approvers/Managers will be detailed in specific courses.

um□ja
t r a i n i n g
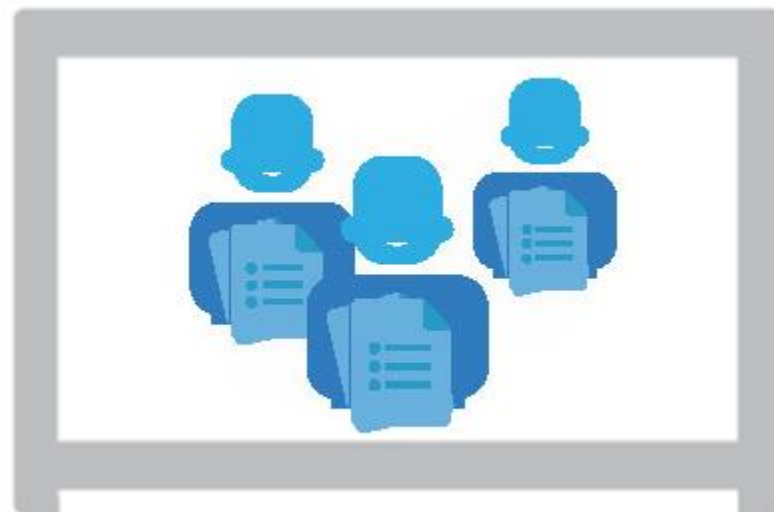
Getting Started

To log on to the actual Umoja Portal, the following are required:

- Browser to access the following url:

    https://selfservice.umoja.un.org

- Confirm browser and operating system requirements for accessing this version.

- Appropriate Umoja Employee Self Service login credentials provided to you by email before go-live of the Umoja system in your entity or upon arrival for new staff.

From:
Do_Not_Reply_Umoja_Login@un.org
Subject:
**[Umoja Update] Your User ID and
Initial Password**
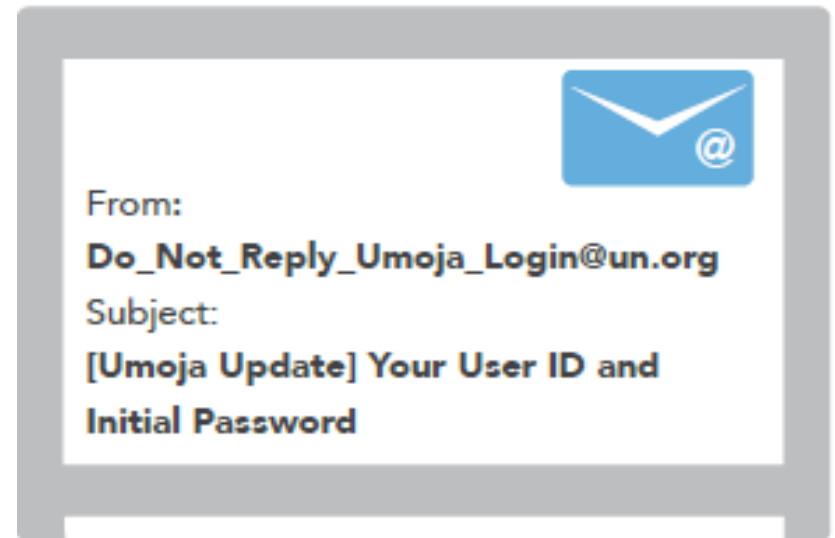
System Requirements - Software

In order to access the Umoja Portal, ensure your computer meets the following minimum browser requirements:

	Microsoft Windows	Apple (Macintosh)
Internet Explorer 6.0 to 10.0 (or higher)	X	
Mozilla Firefox 1.x to 5.x (or higher)	X	
Mozilla Firefox 3.x to 10.x (or higher)		X
Google Chrome 20 to 21 (or higher)	X	X
Safari Version 5.x (or higher)		X

Note: It is advisable to have more than one of the above stated browsers installed on your computer to ensure proper access to the Umoja Portal. Performance may vary slightly within each browser.

umoja
training

System Requirements - Software

Use your EIDMS credentials (User ID and Password) to enter the Umoja Dashboard from which the Umoja Production systems are accessed.

Note: A temporary EIDMS password will be sent to you via email at least one month before Umoja go-live in your location, or upon arrival for new staff. The temporary password must be changed during your initial login.

System Log on

- Your temporary Umoja Production Systems credentials will be emailed to you approximately 2 days before Umoja go-live in your location, or upon arrival for new staff.

- Enter the log-in credentials provided to access the Umoja Portal.

- When both fields are filled, press the **Log on** button to access the ESS Portal main menu.

Note: The temporary password must be changed during your initial login.

System Log on

- If User and/or Password entered are incorrect, system displays a message "User authentication failed"
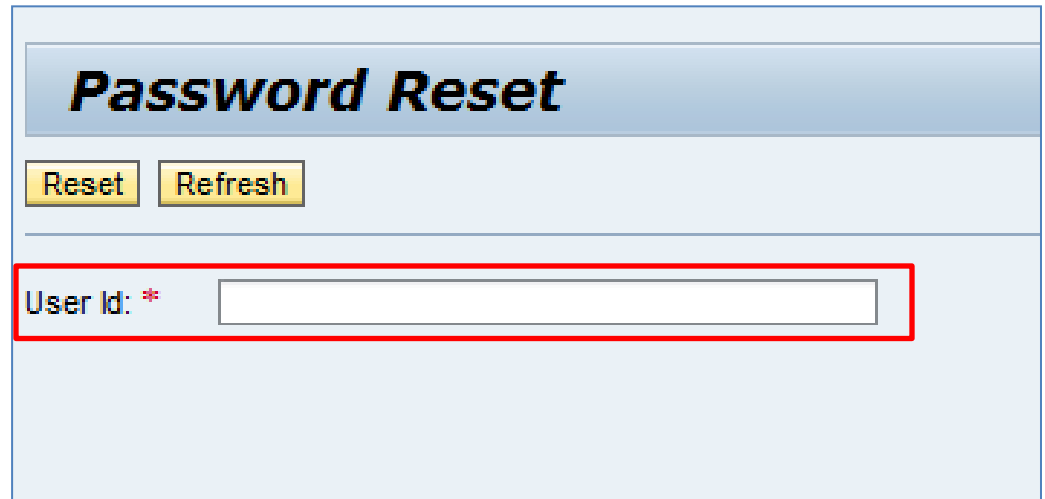
Log on – Forgot Umoja Password

- If you don't remember your password, you can request the system to generate a new temporary password by clicking *Forgot Umoja Password?* link at the bottom of the screen

Log on - Forgot Umoja Password

- When the **Password Reset** window opens, perform the following steps:

  ▶ Enter your **User Id**.

  ▶ Click **Reset** button.
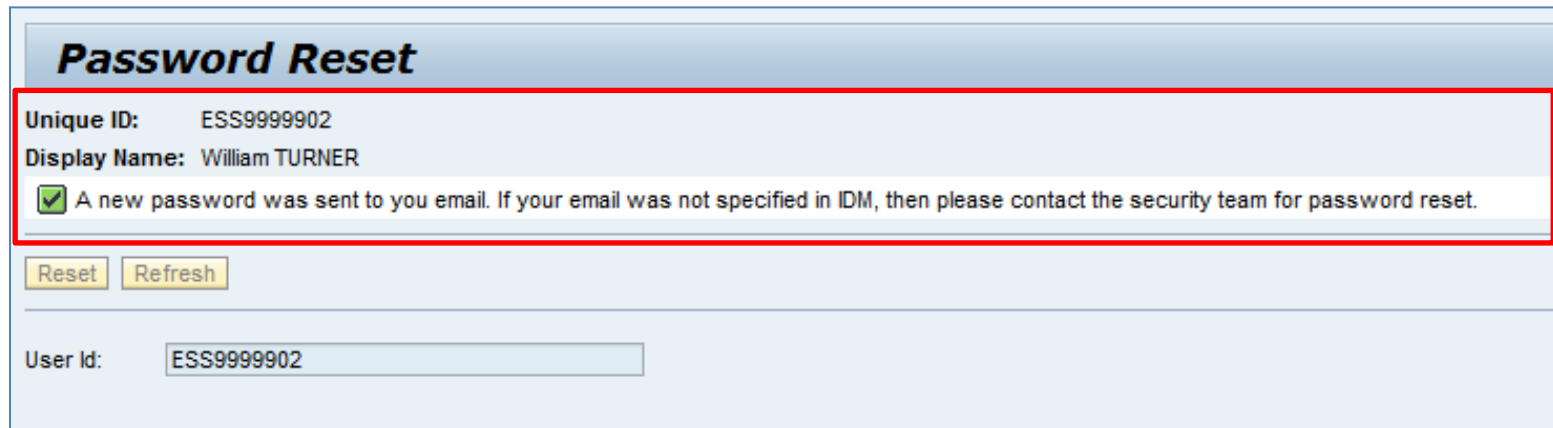
Note: Refresh button is used to clear the content of the User Id field.

Log on - Forgot Umoja Password

- After entering the **User Id** and clicking the **Reset** button, an email will be sent to your mail inbox with a new temporary password. Confirmation is displayed on screen.

Password Reset

Unique ID:	ESS9999902
Display Name:	William TURNER

☑ A new password was sent to you email. If your email was not specified in IDM, then please contact the security team for password reset.

[Reset] [Refresh]

User Id: ESS9999902

umoja
training

PHISHING ALERT

- Phishing is the attempt to acquire sensitive information such as usernames, password, and other personal details by concealing as an electronic communication coming from a trustworthy entity.

- Phishing emails may contain links to websites that are infected with malicious software and typically appear to be sent by an unusual source or display no sender at all.

- These messages often request users to enter details in the fake website which has a look and feel that are almost identical to the legitimate one.

- When this occurs, hackers have the chance to access the user's personal information such as passwords, usernames and bank details, among others.

PHISHING ALERT

If you receive an email message that appears to have been sent by Umoja Employee Self Service and maybe displays the typical layout of Umoja ESS, Portal **please remember:**

- Umoja will **NEVER** send you an email requesting to enter your password or any other personal details.

- You can request a new password **ONLY** from the Umoja Self Service Portal and ONLY following the steps detailed in this course.

- You can enter your personal details including home address and bank Information **ONLY** after logging in to the Umoja Self Service Portal and navigating to the appropriate Content Area.

PHISHING ALERT

If you receive a suspicious message and you suspect may be a case of phishing **please remember:**

- You should **NEVER** click on attachments or links in such emails.

- You should **NEVER** forward such emails to colleagues.

- You should **IMMEDIATELY** advise OICT of suspicious messages.

Umoja ESS Portal: Summary of Navigational Elements

1 Menu Bar

2 Role Toolbar

3 Navigation Bar

4 Search Field

5 Logged in User

6 Log off button

7 Content Area

Copyright © United Nations

Umoja Portal Menu Bar

- The **Menu bar** runs across the top of the Umoja ESS screen and displays different available options/actions specific to the user. The menu bar is visible on all screens within ESS and is a fundamental part of the graphical user interface (GUI). You may discover all available features by getting familiar with it.
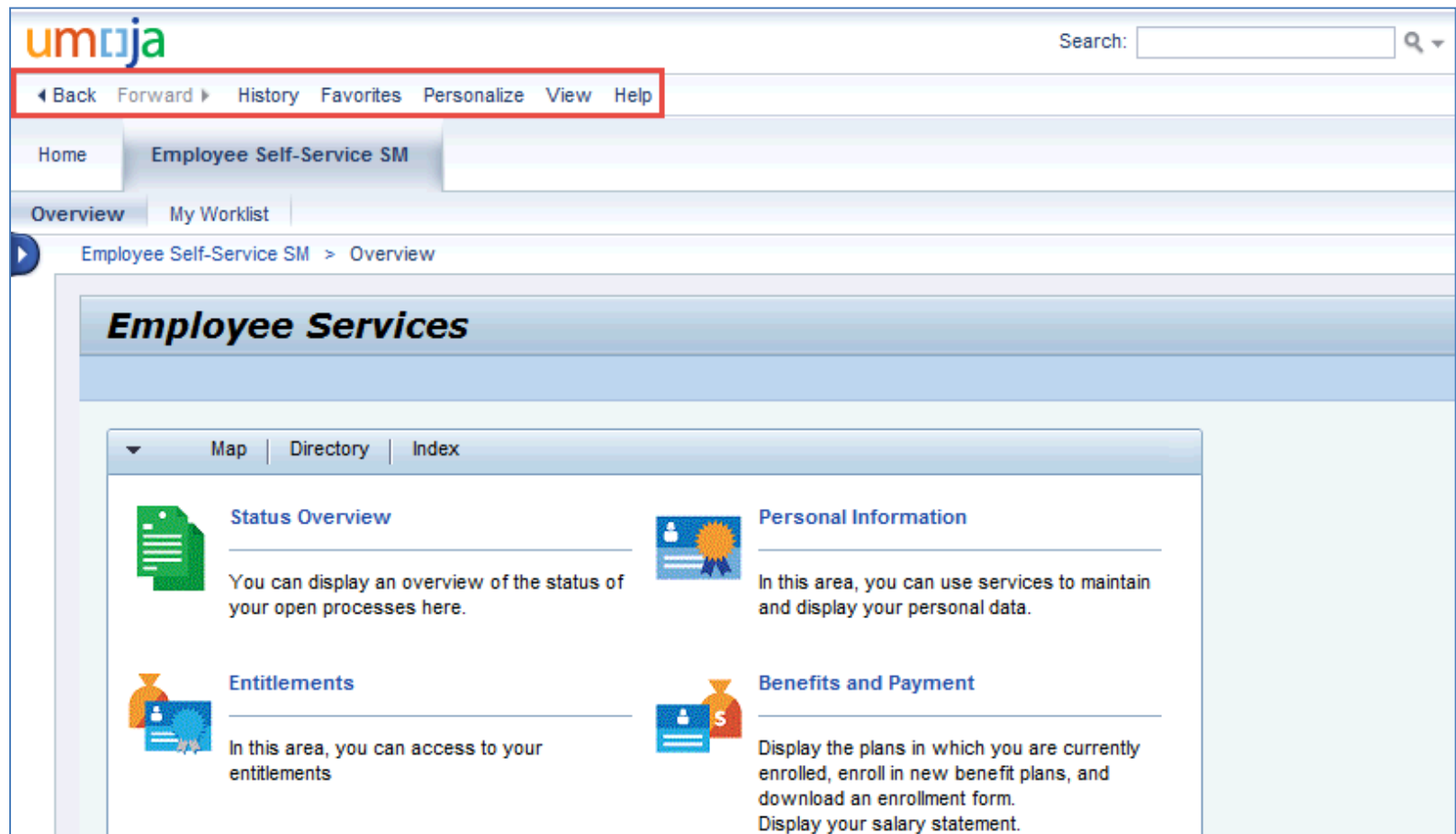
Umoja Portal Menu Bar

- The **Back / Forward Links** open the page you navigated from, or the next page if available.

  Do **NOT** use the browser's back button to navigate to the previous page as it may take you out of the Umoja Portal.

Umoja Portal Menu Bar

- The **History Link** lists the most recent items you have viewed in the Umoja Portal.
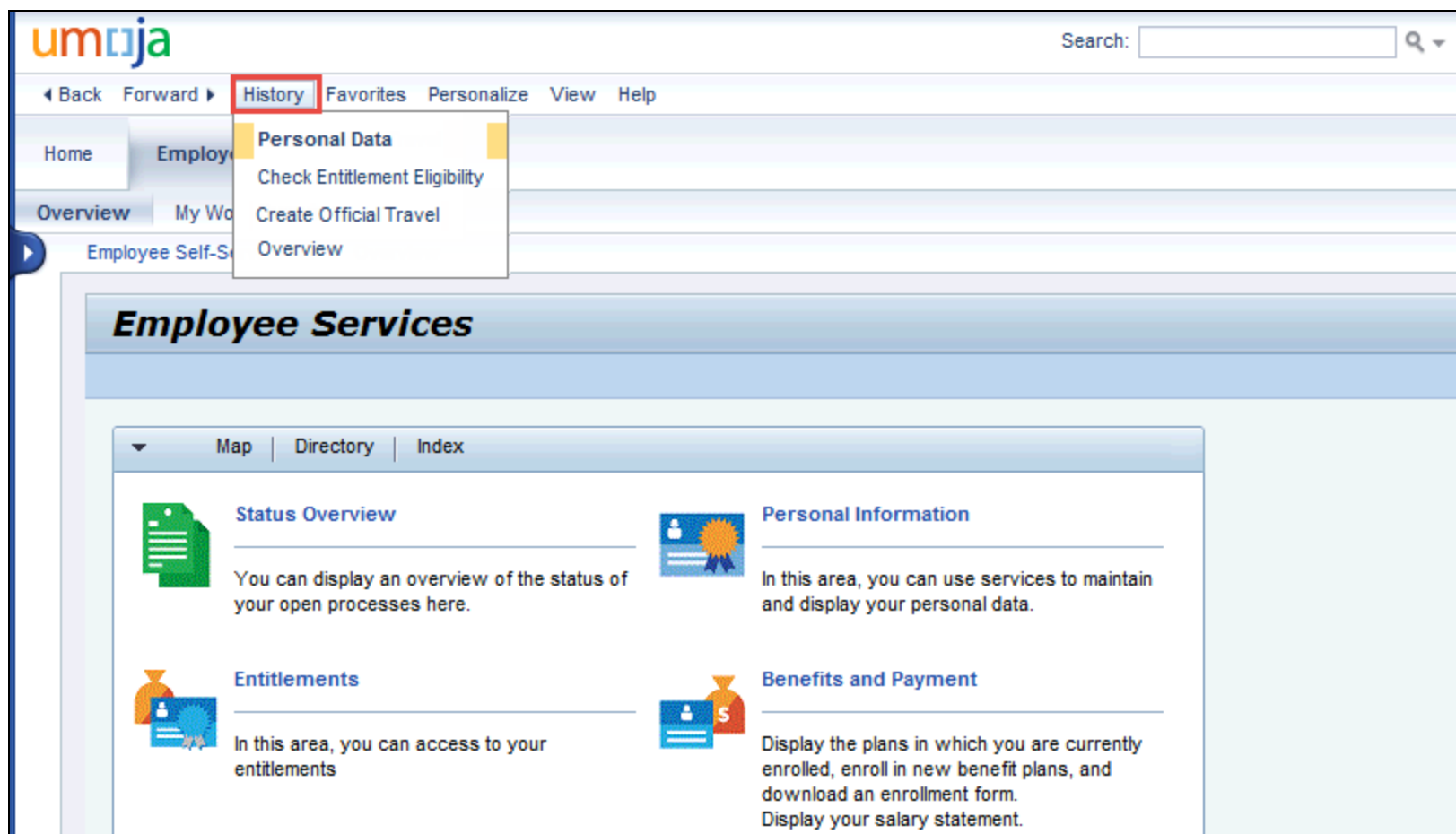
Umoja Portal Menu Bar

- The **Favorites Link** allows you to **Add to Favorites** or to **Organize Favorites** (create folder, create new links, remove, rename, reposition, etc.).

Umoja Portal Role Toolbar

- The **Role bar** runs across the top of the Umoja Portal screen and displays the different menu tabs available. The **Role bar** is visible on all screens within ESS. However, options displayed will depend on the roles assigned to you in Umoja.

Enterprise Roles in Umoja

- The structure and delivery of content of the Umoja Portal to the different users is determined by the role or user's tasks within the Organization.

- The role-based setting enables the different users — from Employees to Managers, to HR Partners, to Certifying Officers — to focus exclusively on data relevant to a specific function.

- Users can access their dedicated Umoja Portal role-based applications, information repositories, and services by clicking on the relevant Portal tab.
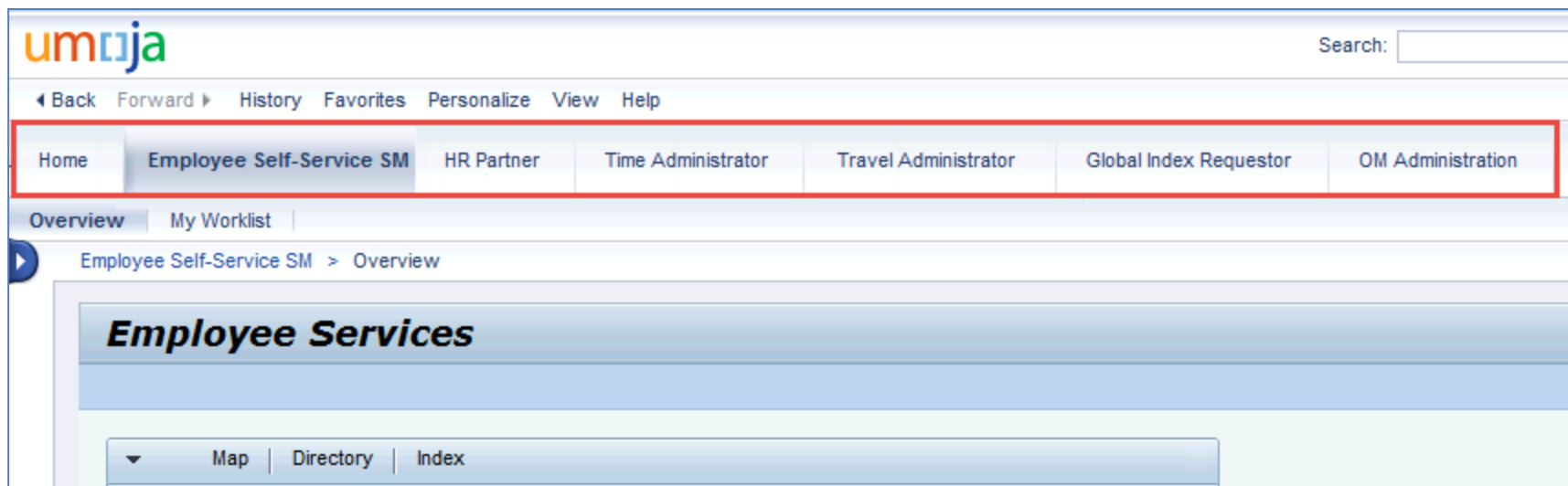
Umoja Portal Role Toolbar

- Most staff members will see two primary tabs: "**Employee Self Service SM**" and "**Home**". This course will focus on the structure and options available under these two tabs.

- Any other tab users may see are connected with their Enterprise Role/s in Umoja and will be detailed in other dedicated courses.
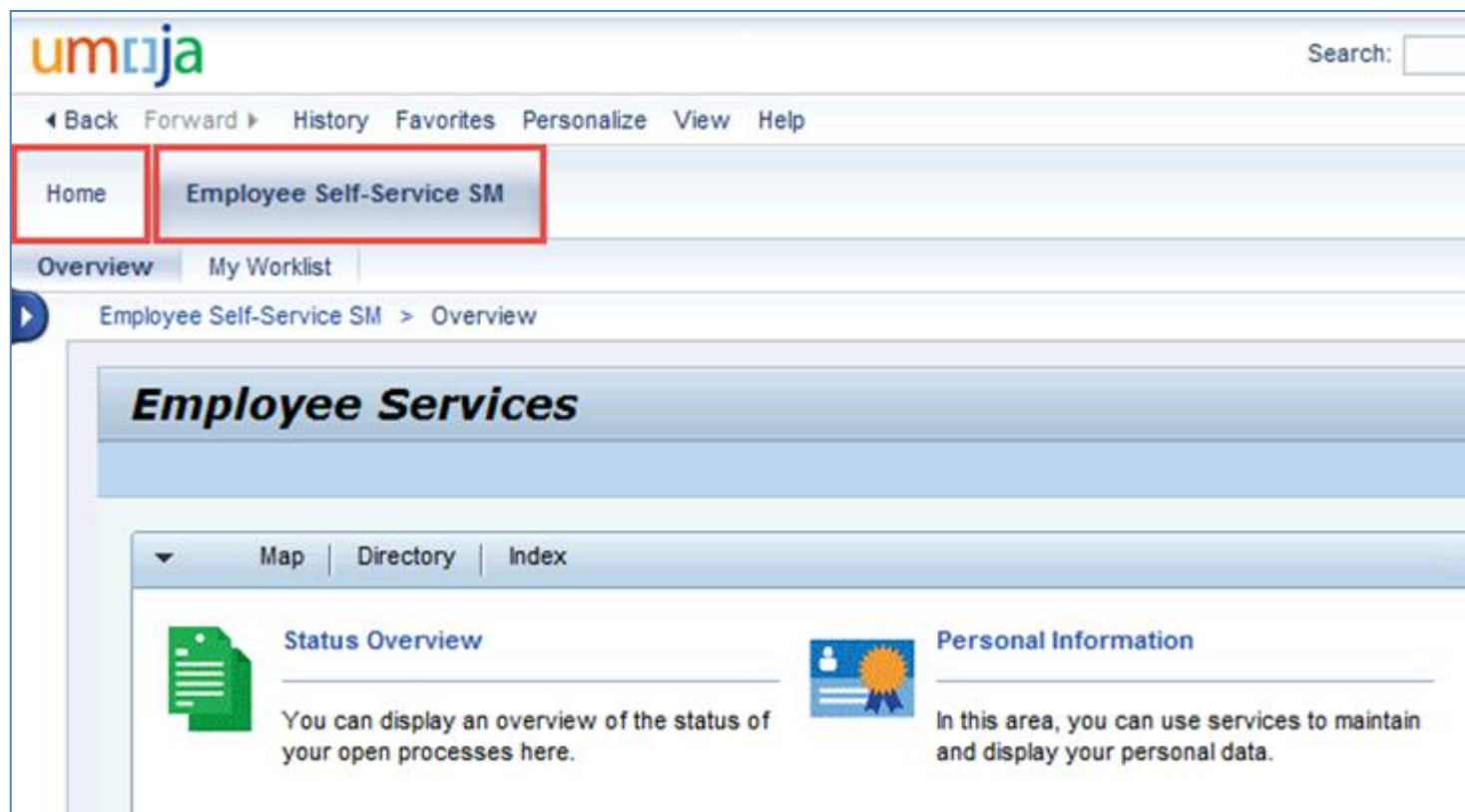
Umoja Portal Navigation Bar

The **Navigation bar** displays two options:

- **Overview:** displays all the processes that can be initiated by the employee.
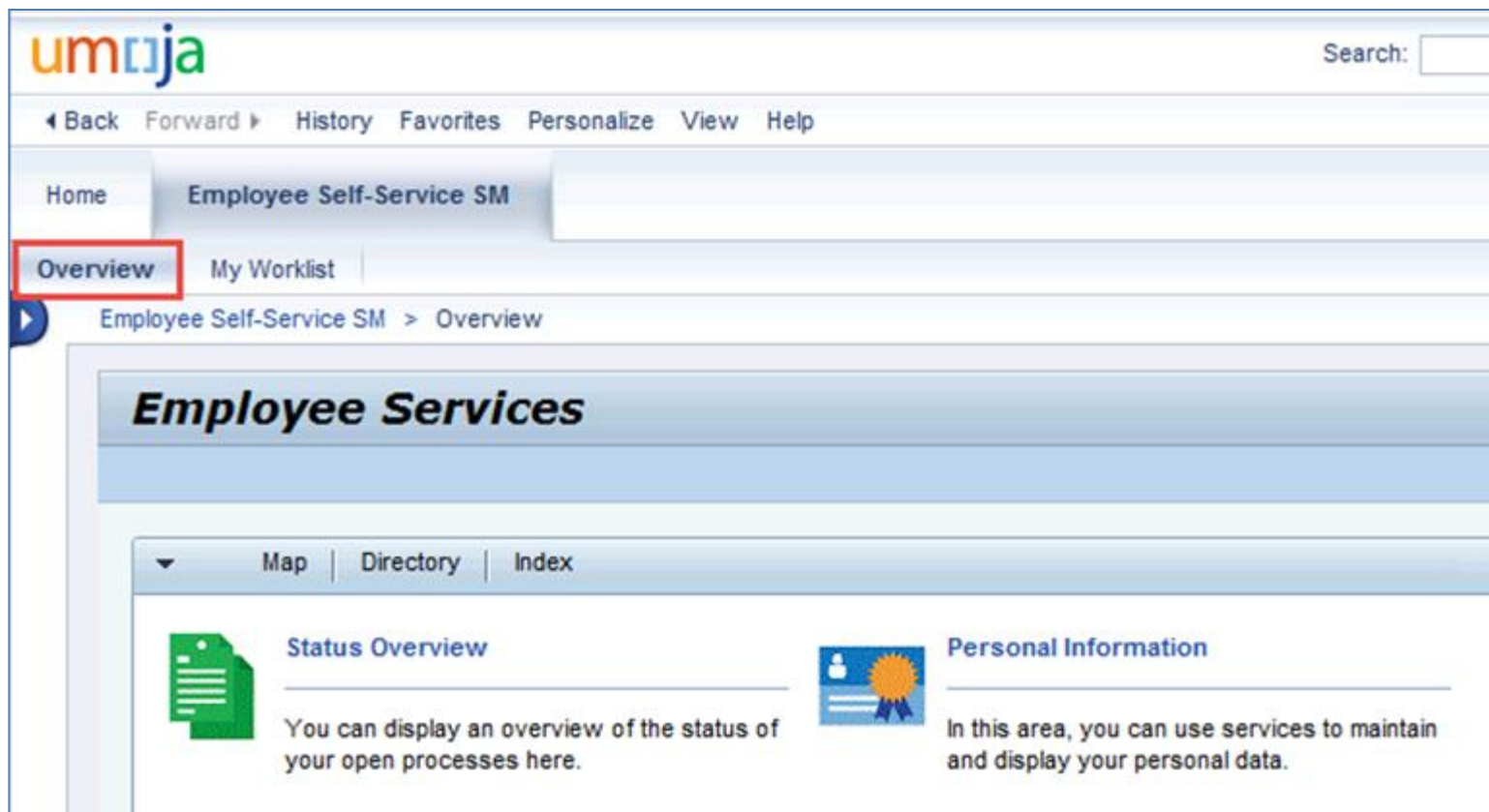
Umoja Portal Navigation Bar

- **My Worklist**: displays all the tasks that can be processed/reviewed/approved by the employee. However, a better view of the employee's tasks is available in **the Approver Work Center** under the **Home** tab
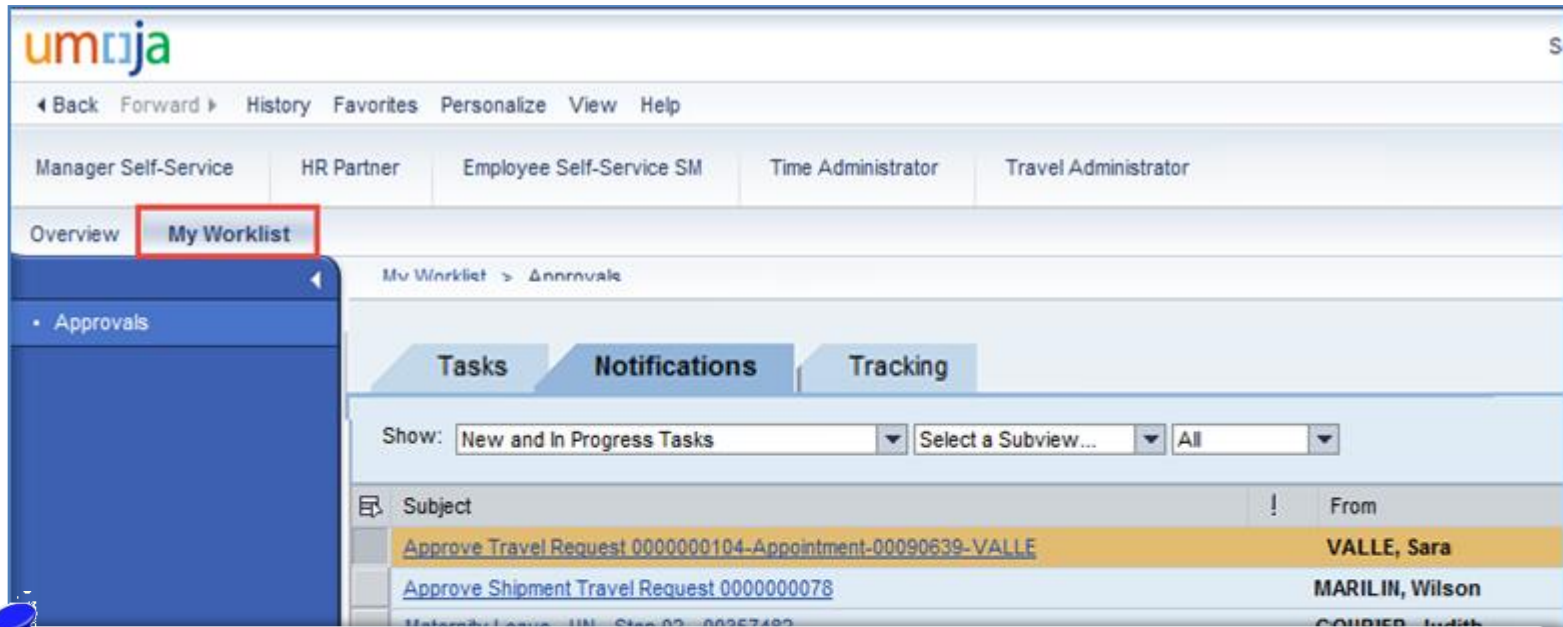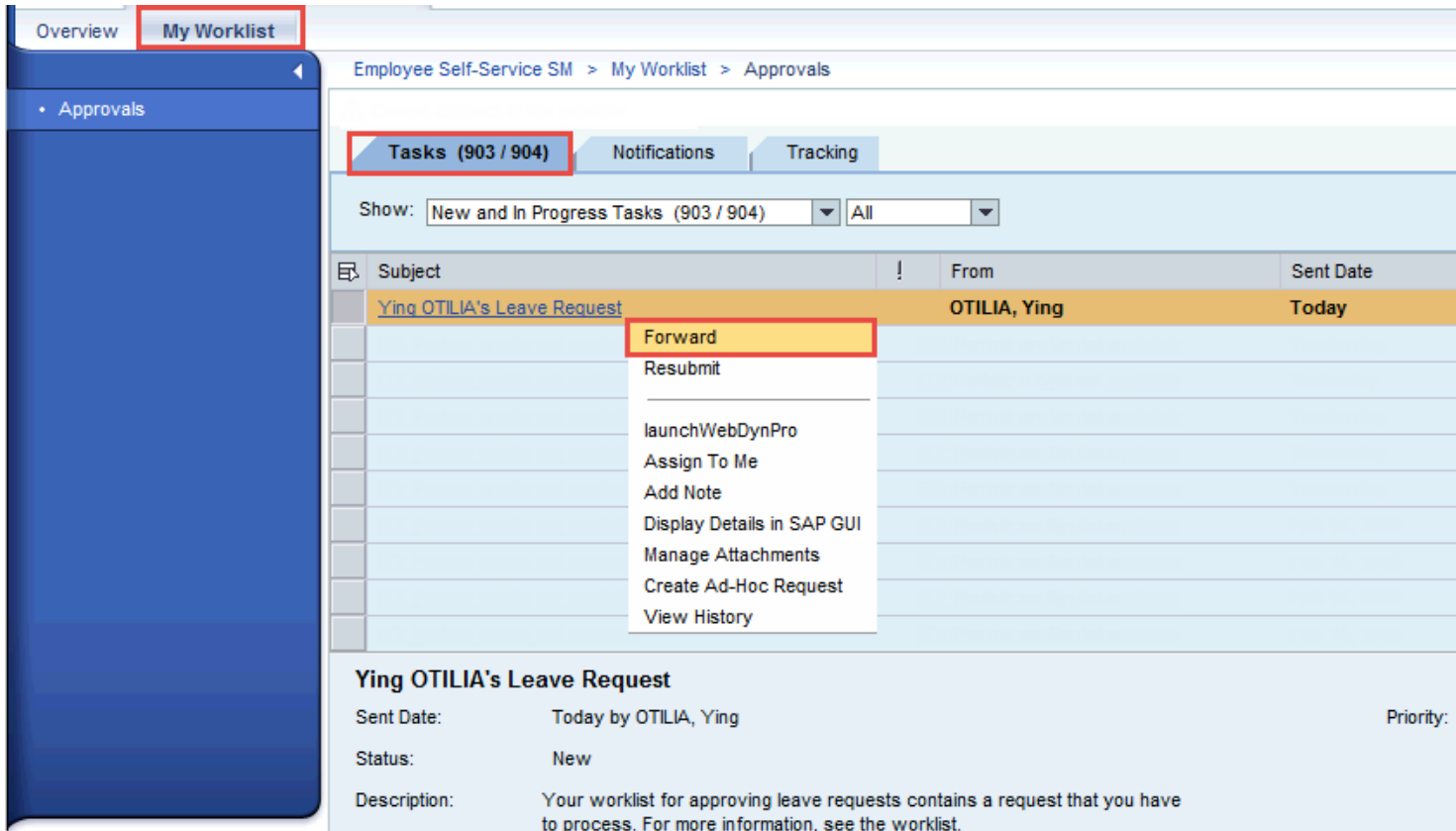
Note:
- **Tasks Tab**: displays a list of all the processes that require the user's action (e.g. approve Travel Request).
- **Notifications Tab**: displays the received notifications.
- **Tracking Tab**: displays the status of the processes in which the user is or has been involved.

Portal Workflow– Forward to another Approver

- In case the task received should be handled by another person, the Approver can navigate to My Worklist page and under the Tasks tab identify the request and forward it to **another Approver** (e.g. Manager or HR Partner).
- To forward the task the Approver must right-click on the task and select **Forward** from the drop down list.

Portal Workflow– Forward to another Approver

When the **Forward** pop-up window appears, click **Select** button and enter the user id of the new approver in the **Search for Name** field.

Click **Apply** button to confirm and continue.

To finalize, click **Submit** button to forward the request to another Approver.
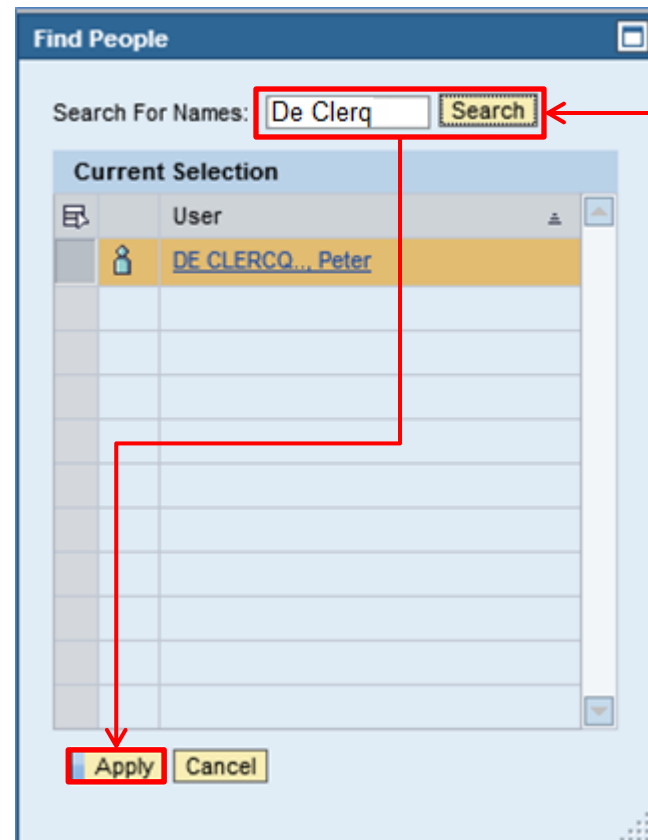
Umoja Portal Navigation Bar - Path Bar

The **Path bar** is located right under the Navigation Bar. It displays information on the path to access the current screen.

The **Path bar** is visible on all screens within ESS Portal.

Umoja Portal Content Area - Title Bar

Title Bar is located directly below the Path Bar. The title in this bar changes according to the menu and screen you are navigating.

Umoja Portal Area Group Page (or Home Page)

The **Area Group Page or Home Page** is located directly below the Title Bar and introduces the employee directly to their dedicated applications.

The **Area Group Page** changes according to the menu tab and screen you are accessing (i.e. Employee Self Service menu, Time Administrator menu, etc.).

The **Link** contained in the Area Group page can be either within or outside Umoja (i.e. link to Inspira, etc.)

Employee Services

Map | Directory | Index

Status Overview
You can display an overview of the status of your open processes here.

Personal Information
In this area, you can use services to maintain and display your personal data.

Entitlements
In this area, you can access to your entitlements

Benefits and Payment
Display the plans in which you are currently enrolled, enroll in new benefit plans, and download an enrollment form.
Display your salary statement.

Life and Work Events
Guides you through a number of Life and Work Events from a birth of a child to beginning work at a new company.

Travel, Shipment and Expenses
In the area, you can handle and process travel requests, shipment, travel plans, and expense reports.

Quick Links
Traveler Work Center
Create Official Travel
Create HR Travel
Create Entitlement Travel

Time Management
In this area, you can use services to record your working time, request leave, and display your time account data.

Umoja Portal - Link Area Pages

Each Area Group Page displays a group of dynamic navigation **Link Area Pages** (i.e. Entitlement, Time Management, Personal Information etc.)
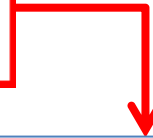
Umoja Portal - Quick Link Service

By clicking on each Link Area Page, you can display the **Quick Links** that are relevant to the content displayed in the Area Page (i.e. Special Leave Request, Absence and Attendance Request, etc.)

Umoja Related Links – Processes and Forms

By clicking on each Quick Link, the form or the process associated to this link opens in a new window.

Absence and Attendance Request

Create Leave Request

You can request leave and other types of absences here.

Gagnon PIERRE - Leave Request: New

✉ Send

▼ Leave Details   Check

** Please, remember to use check button to calculate the days/hours**

* Type of Leave: Annual Leave
Description: Annual Leave

General Data

* Start Date: 09.05.2014
* End Date: 09.05.2014
Att./abs. days: 1.00
Approver Name: Andrey Anatolivich SHVYREV
New Note:

Umoja Portal – Content (Home Page)

- A different menu is available to each Enterprise Role which enables access to different Content Area and the execution of different transactions. For example:

  - **Administrators (Time or Travel)** will have a tab to: view employee data, initiate requests for leave and time entries, or initiate travel requests and expense reports on behalf of employees who have no access to ESS

  - **OM Administrator** will have a tab to: create positions, maintain/extend loan positions and return positions from loan.

Umoja Portal - Screen Elements

Quick Criteria Maintenance:

- To facilitate searching for pending or completed tasks, you can use the Quick Criteria Maintenance queries available in work areas such as Work Overview and under most of the Approver Work Center tabs.

- You need to click Show Quick Criteria Maintenance to display the query fields.

Umoja Portal - Screen Elements

Quick Criteria Maintenance:

- Under the Hide Quick Criteria Maintenance each field can be used as filter or query parameter to facilitate searching of a specific task or a group of tasks

- Query parameter can be used individually or combined (i.e. Organization Unit, Effective Date and Process Name).

- Don't forget to remove your query parameter if no longer required to avoid your list of tasks appearing incomplete

Umoja Portal – Filter and Setting

Filter and Setting:

- To sort the content of the columns displayed in the work area, click **Filter**
- The filter icon will appear
- Click on column name (i.e. Initiator name) to sort the column content

Umoja Portal – Filter and Setting

Filter and Setting:
- To change the work area layout click **Setting**
- Select a column you wish to display and click **Add** button
- Select column you wish to hide and click **Remove** button
- Change the column sequence clicking on **Change Sequence** button
- Click **Apply** to transfer your setting to the page layout then **OK** to confirm your selection

Umoja Portal – Filter and Setting

Filter and Setting:

- Under the **Filter** tab in the **Setting** screen you can apply a filter to one available field of your choice

- Under the Display tab in the **Setting** screen, change the way columns are displayed on the table.

Umoja Portal - Screen Elements

While each Form displays specific fields and features that will be described in the specific courses and modules, the next few slides describes generic fields and features used in most Forms

- **Data fields:** These are found on any Umoja ESS form. There are two types of data fields – **data entry** and **data display fields**

- **Data display fields** are read-only. They cannot be modified and generally appear grayed out, to indicate that it is currently disabled and cannot be selected.

- **Data Entry fields** generally appear "white" and are not grayed out. The most common used **data entry fields** are :

  - ✓ **Numeric** fields (including Currency)
  - ✓ **Date**, **Calendar** and **Time** fields
  - ✓ **Text** fields (including multiple line text fields), which are free text and accommodate all kinds of characters
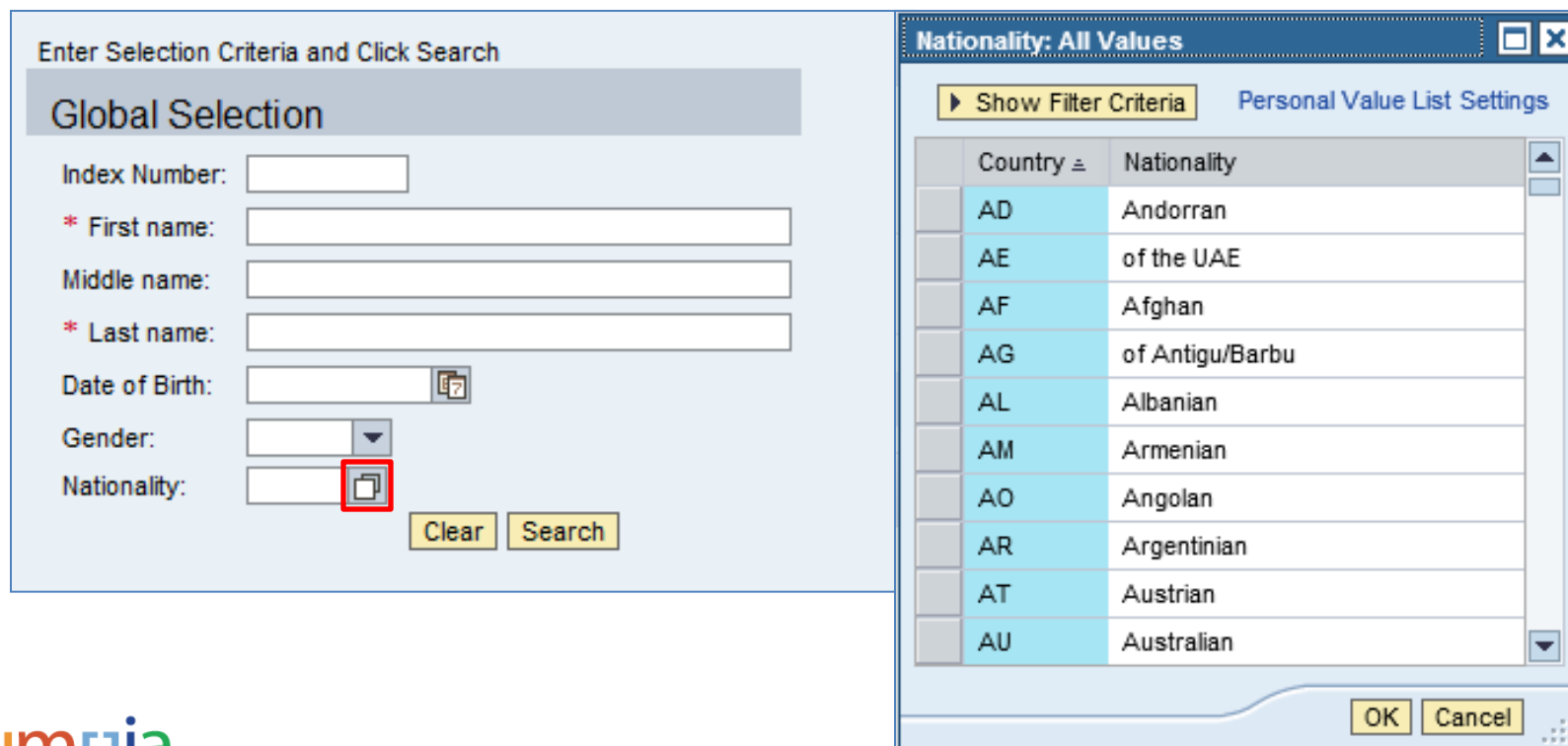
Type Of Absence:	Maternity Leave
Start Date:	01.07.2014
Expected Delivery Date:	05.08.2014
End Date:	20.10.2014
Absence Days:	76.00
Note To Approver:	

Data entry (modifiable)

Data display (not modifiable)

Umoja Portal - Screen Elements

- **Matchcodes:** This button appears on the right side of fields with a search functionality. The matchcode search allows the user to filter possible entries for a field.
- When a **Matchcode** button is clicked, a pop-up window is displayed with all the possible options for that field.

In this example, all the possible nationalities are displayed.

Umoja Portal - Screen Elements

- **Tabs**: You can use tabs to enter, display and navigate from/to different screens.

- **Checkboxes:** A checkbox consists of a descriptive text and a square checkmark element. Clicking the checkbox selects or deselects the option described in the field text.
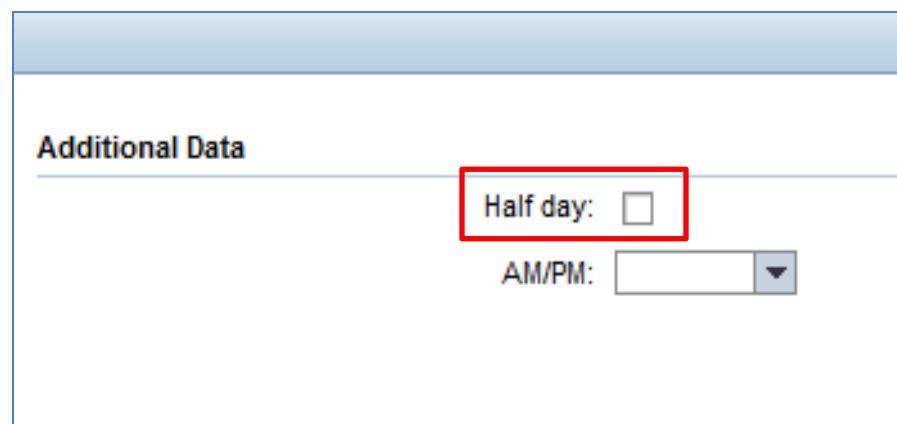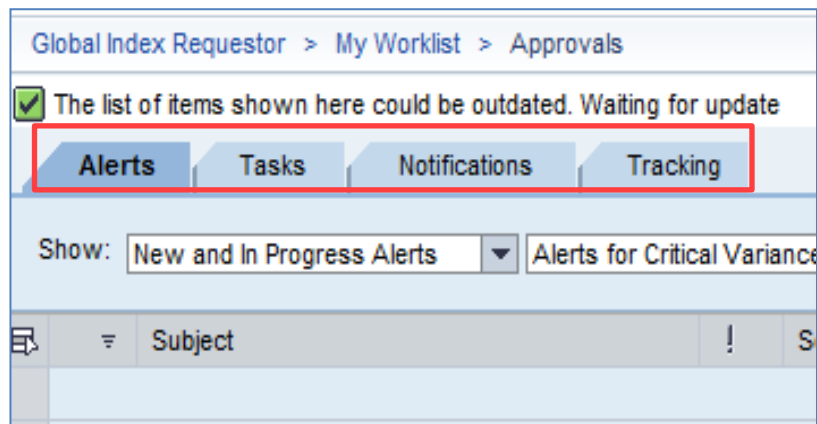
Umoja Portal - Screen Elements

- **Radio buttons**: Click on one radio button to select an option. Only one option can be chosen for a field that uses radio buttons.

- **Drop-Down**: You can click on a drop-down list to display available values. Click on one item to select a value from the list.

Umoja Portal - Types of Fields

A field in Umoja ESS can be required or optional:

- **Required fields**: These fields are necessary to complete a form and are typically indicated by an asterisk. Omitting a required field will produce an error message

- **Optional fields**: These fields are not necessary to complete the process, but offer additional information or are required by the internal business processes.

Note: Some fields affect other input fields. Depending on the value entered in a field, other fields may become required.

Umoja Portal - System Messages

In the Umoja Portal, there are three types of system messages. These messages vary depending on the type of action that needs to be taken.

Information Message

Warning Message

Error Message

Information Message: An information message appears when you have completed a process successfully. These appear only for informational purposes and do not require any further action.

Leave Request: Paternity Leave

Send

☑ Check of leave request was successful

▼ Leave Details   Check

"" Please, remember to use check button to calculate the days/hours""

* Type of Leave: Paternity Leave
  Description: Paternity Leave

Umoja Portal - System Messages

Information Message	Warning Message	Error Message

Warning Message: A warning message indicates that Umoja has detected a possible error or contradiction and the entry should be verified.

- In some cases the messages are standard SAP texts that may not have a clear meaning for the user.

- However, this type of message still allows you to submit a form and does not prevent processing.

Leave Request: New

⚠ Earliest recalculation for time evaluation exceeded -
Display Help
⚠ The absence is for more than one day: Clock times will be removed

Type of Absence

Type of Absence: Annual Leave-Home Leave

General Data

Start Date: 01.05.2014
End Date: 30.05.2014
Abs/Att days: 22.00
Approver Name: Andrey Anatolivich SHVYREV
Note:
Used: Annual Leave Balance: 22.00 Days

Additional Data

Half-day:
AM/PM:

OK Cancel

Umoja Portal - System Messages

Information Message	Warning Message	Error Message

Error Message: An error message appears in Umoja when an incorrect entry is made or when a required entry is omitted or incomplete.

The system will not allow you to continue to the next field or screen until you correct the indicated problem.

William TURNER - Leave Request: Annual Leave, 24.06.2014

Send

No quota available for att./abs. Annual Leave(1100) for pers. no. 09999902 between 24.06.2014 and 24.06.2014 - Display Help
You must make an entry in the Att./abs. days field

Leave Details   Check

** Please, remember to use check button to calculate the days/hours**

* Type of Leave: Annual Leave
Description: Annual Leave

General Data

* Start Date: 24.06.2014
* End Date: 24.06.2014
Att./abs. days: 0.00
Approver Name: Juan Carlos ARAUJO GALVEZ
New Note:

Umoja Portal - Screen Elements

- **Collapse/Expand Tray:** Used to minimize or expand windows that you can view within a screen. E.g. Attachment required in the **Maternity Leave** form is under a **Collapsed/Expand Tray** area called **Form Utilities**.

Umoja Portal - Screen Elements

Collapse/Expand Tray:

- In order to show the Tray, the **expand** button has to be clicked. The same button must be clicked to hide the tray.

- The attachment can be added by clicking the **Add Attachment** button.

Document Management within Umoja ESS

In a strategy towards reducing its carbon footprint, the UN has a target to become paperless, wherever feasible. Umoja supports this by facilitating the attachment of scanned documents into relevant transactions within the system. This reduces the need for multiple copies and allows access to the documents by authorized roles from any UN location.

The Document Management solution within Umoja ESS is referred to as "**Umoja Records Management**". This solution enables you to associate the uploaded documents to specific Umoja processes in order to maintain the appropriate paper trail for reporting and auditing purposes. In addition, being able to review uploaded documents through **Umoja Records Management** expedites the review process of activities requiring approvals via workflow.
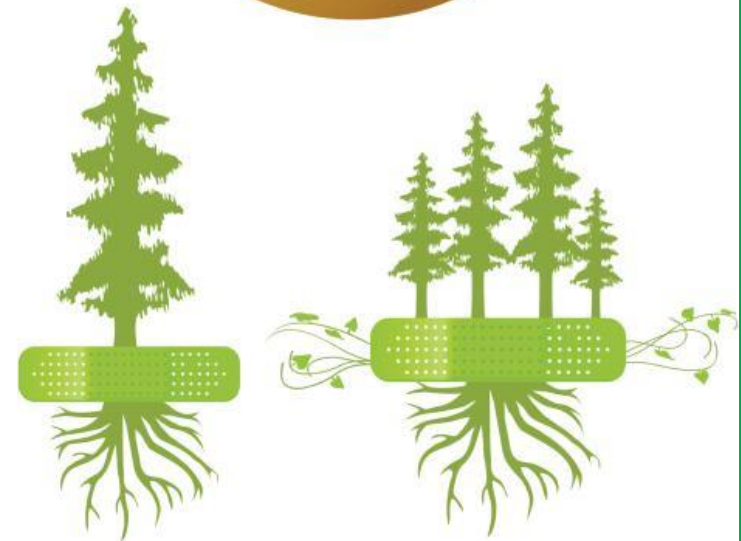
Policy: Attached Documents in Umoja ESS

Documents attached in Umoja processes such as **Maintain Family Status** will be considered **original documents from a trusted source**, provided the following guidelines are followed:

If received via email, the original document is considered to be the combination of the email message as well as the attached document. Both documents should be attached in the corresponding process in Umoja.

If received via postal mail or hand delivery, the original document is considered to be the document itself.

The scanned version of a document in the corresponding Umoja process will also be considered an original document from a trusted source.

Saving Your Work in Umoja ESS

When you are working through a process that consists of several steps/screens in Umoja Portal, the system displays a process flow diagram.
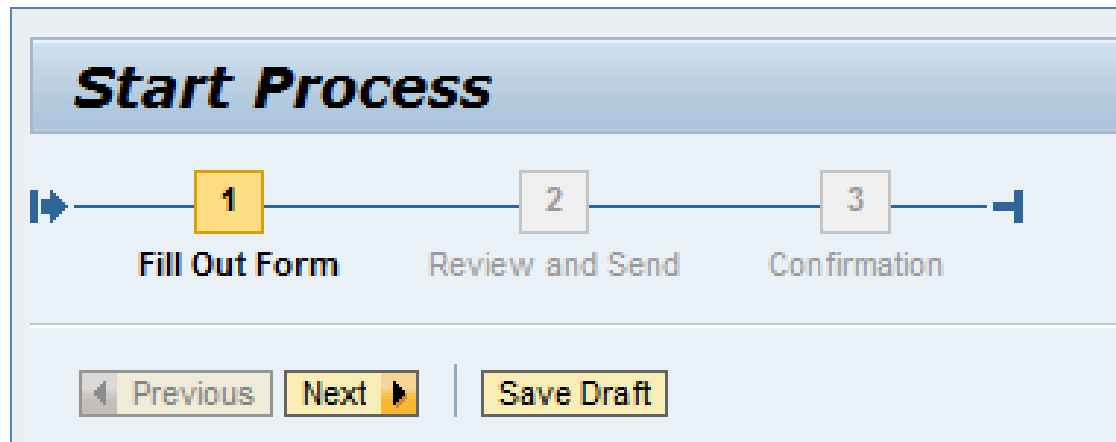
While the process is running, the system can temporarily store the data you have already entered if you click the Save Draft button.

Saving Your Work in Umoja ESS

Click **Next ▶** button to save data entered and continue to the next screen of the process.

Start Process

1	2	3
Fill Out Form	Review and Send	Confirmation

◀ Previous | Next ▶ | Save Draft
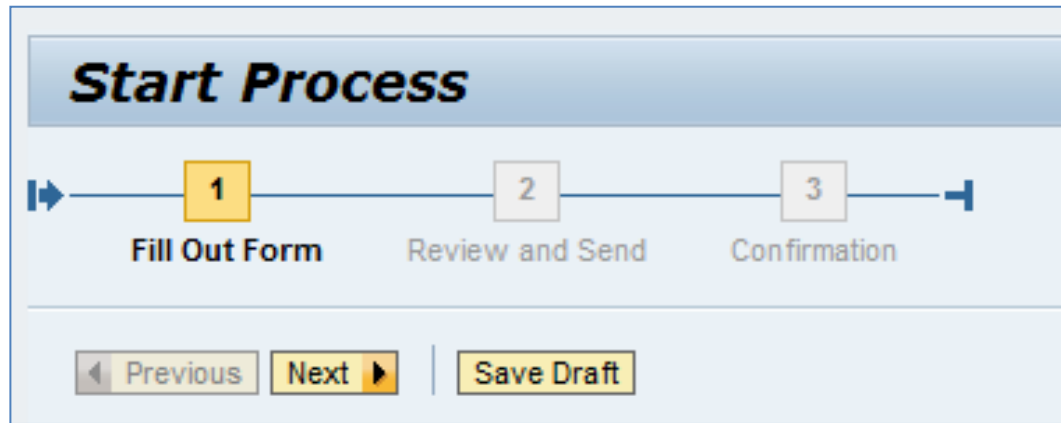
Click **◀ Previous** button to leave the current screen without saving your changes.

Start Process

1	2	3
Fill Out Form	**Review and Send**	Confirmation

◀ Previous | Send ▶
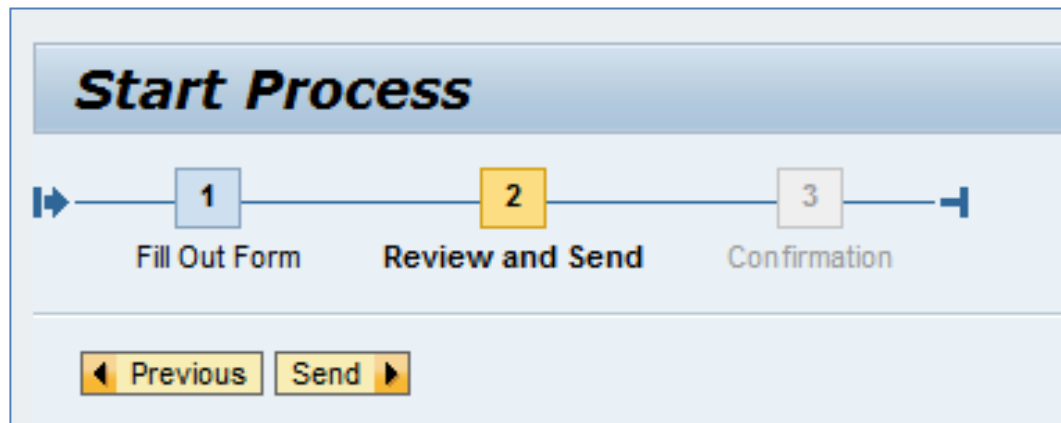
Saving Your Work in Umoja ESS
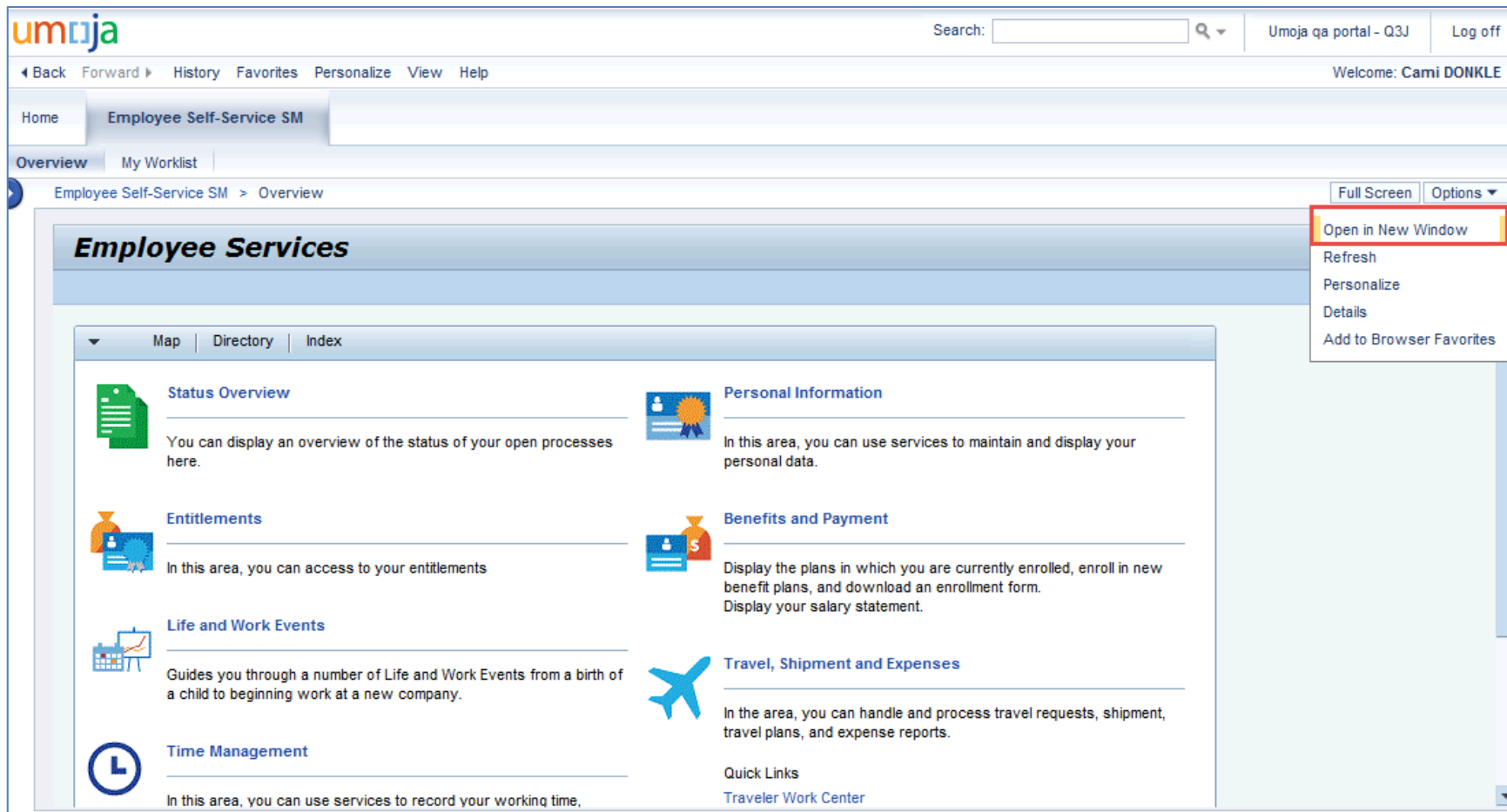
After you complete all the necessary screens associated with the process, save your data permanently by clicking the Send ▶ button.

This action sends your data (or data changes) to the ECC system where it may then be processed. In some cases, workflow routes the request to another authorized role (Manager or HR Partner) for approval before processing.
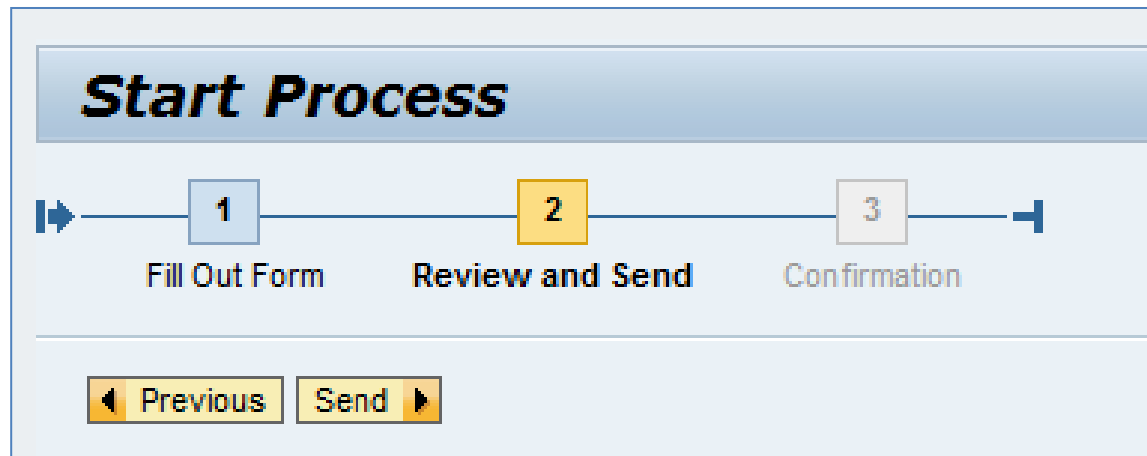
Open Multiple Sessions

Umoja ESS/MSS allows you to open as many Umoja sessions as you want at the same time. This enables you to work on more than one task at a time without losing any data in the previously opened sessions. To do so, click **Options ➔ Open in New Window.**

Log off from Umoja ESS

To log off from Umoja ESS:

- Click menu item: **Log off**. The **Log Off** pop-up window is displayed.

- Click **Yes** on the **Log Off** pop-up window.
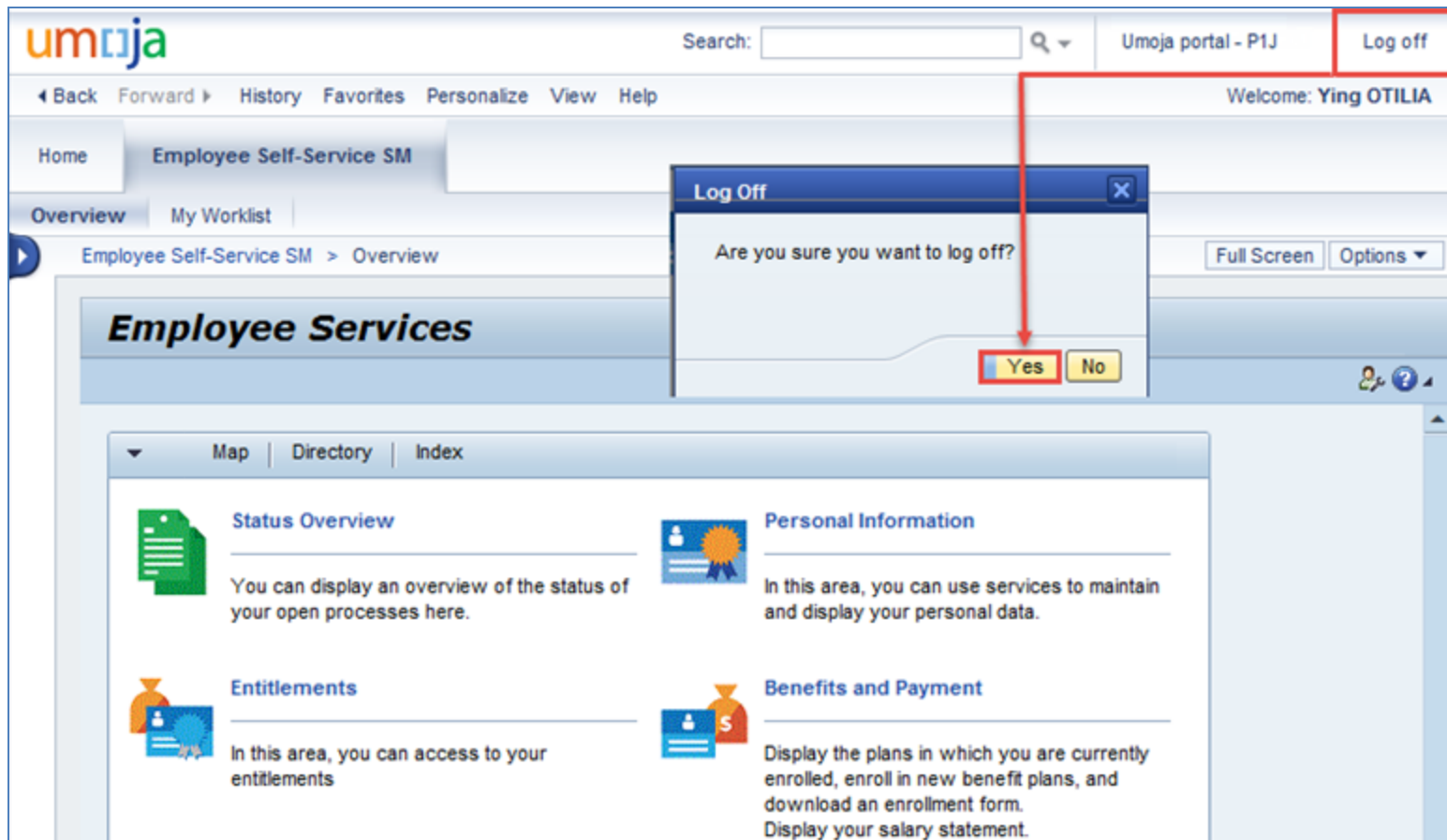
Learning Checkpoint 1

Which tabs under the Umoja Portal are available to all Staff Members ?

Select all that apply.

   A.   Employee Self Service

   B.   Travel Administrator

   C.   Time Administrator

   D.   Home

Learning Checkpoint 1

Which tabs under the Umoja ESS Portal are available to all Staff Members?

Select all that apply.

- **A.** **Employee Self Service**
- B. Travel Administrator
- C. Time Administrator
- **D.** **Home**

Options A and D are the correct answers.
All Staff Members of the UN Secretariat are automatically granted the ESS-Staff Umoja Enterprise Role and will be given access to Umoja ESS Portal, where they will see two primary tabs: "Employee Self Service" and "Home" .

Learning Checkpoint 2

Which of the following screen elements changes according to the Role tab you are accessing?

Select the correct option.

A. Logged in User

B. Navigation Bar

C. Role Toolbar

D. System's Services

Learning Checkpoint 2

Which of the following screen elements changes according to the Role tab you are accessing?

Select the correct option.

A.   Logged in User

B.   Navigation Bar

C.   Role Toolbar

D.   System Services

Option D is the correct answer. The selected tab of the Role toolbar determines which services will be available and shown to the user on the System Services screen.

Simulation Activities

Throughout this training, users will have the opportunity to conduct activities in the form of simulations. Simulations are interactive "recordings" of the Umoja system used to help facilitate a hands–on learning experience. The simulation links are provided on the corresponding activity slides.

Users can access simulations in three different modes:

- **Show me:** Users view a video of an entire transaction being conducted.

- **Let's do it together:** Users will be prompted to input data at key points during the transaction (recommended).

- **Try it:** Users can complete an entire transaction on their own, with no additional instructions provided.

Activity 1

Transaction Name: Umoja ESS Log In and Log Out

Description: In this simulation, you will learn how to log in and log out of the Umoja ESS Portal.

Guide me: Umoja ESS Log In and Log Out

umoja
training

Activity 2

Transaction Name: Umoja ESS Navigation Basics

Description: In this simulation, you will learn how to navigate the different screens and menus in Umoja ESS.

Guide me: Umoja ESS Navigation Basics

Module 1 Summary

The key points covered in this module are:

- The Umoja ESS Portal screen has various components, such as **Menu bar**, **Role Toolbar** and **System Services**, to perform different functions.

- Each System Service displays a group of dynamic navigation **Content Areas.**

- Each Content Area groups a number of **Area Related Links** which direct the user to the different **Forms** available in the Umoja ESS Portal.

- The **Overview** tab contains links to the different actions that can be initiated by the employee.

- **My Worklist** tab displays all tasks that can be processed/reviewed or approved by the employee. However, similar functions are available in more user friendly layout under the Approver Work Center.

Agenda

Course Introduction
Module 1: Umoja ESS/MSS Navigation Fundamentals
Module 2: Umoja ESS/MSS Additional Features and Functionalities
Course Summary
Course Assessment
Course Survey

Module 2 Objectives

After completing this module, you will be able to:

- Describe the functionalities available under the Umoja Portal Home page

- Describe the functionality of Workflows in ESS/MSS

- Identify all actions and features available under the Umoja Employee Self Service tab

Umoja Portal - Home Page

- The **Home** Page tab is available to all authorized users in ESS. Through this page, employees can review their outstanding tasks, display their organizational assignment, their role mapping, and their approvers.

Home Page – Approver Work Center

- The **Approver Work Center** is available to all employees with access to the ESS Portal. However, the tabs displayed under the **Approver Work Center** will depend on the roles assigned to you in Umoja therefore only manager who are required to perform approving functions will be able to see pending request in their work area

Umoja Portal – Manager Self-Service

- The **Approver Work Center**, gives Approvers a single point of access to manage their workflow efficiently, effectively, and proactively.

- All Employees have the Time Manager tab available under their **Approver Work Center**. However, this work area will display as empty unless they have been assigned the Primary or Secondary Time Manager role.

Approver Work Center

| Draft | Returned | **Time Pending Items** | Time Completed Items |

▶ Show Quick Criteria Maintenance

Change Query   Define New Query   Personalize

View: [Standard View] ▼ | 👥 Review and Approve | 👓 Display | | Refresh

Filter Settings

Process Ref...	Process N...	Subject	Initiator Name	Sent Date	Effective ...	Priority	Status	Affected Employee ...	Affected Employee

umoja
training

Umoja Portal – Manager Self-Service

- Primary Time Managers, who are required to regularly review and approve requests for Absences and Attendances, will see pending and completed requests appearing in their **Approver Work Center**.

- However, a Staff Member delegated by the Primary Time Manager to approve leave in his/her absence, will be able to view pending and completed requests in this work area, only for the period the delegation is active.   During this period he/she would temporarily have the Secondary Time Manager role.

Approver Work Center

| Draft | Returned | **Time Pending Items** | Time Completed Items |

▶ Show Quick Criteria Maintenance   Change Query Define New Query Personalize

View: [Standard View] ▼ | 👤 Review and Approve | 𝟞𝟘° Display | | Refresh   Filter Settings

	Process Ref...	Process ...	Subject	Initiator Name	Sent Date	Effective ...	Priority	Status	Affected Employee ...	Affected Employee
		Annual L...	Humam EVERY's Leave Request	Humam EVERY	18.02.2015	20.02.2015	5 Medium	Ready	ODMSD ODDMS OCI...	Humam EVERY

Home Page - User Map

- The **User Map** tab is available to all authorized users in ESS Portal. Through this page, employees can display their organizational assignment, the role(s) they are mapped to, and their corresponding Approvers: Time Manager, HR Partner, Travel Processor, etc.
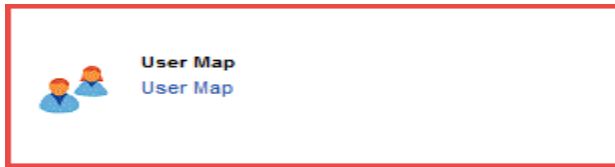
Home Page – Organizational Assignment

- **User Search tool:** Enables the user to search for employees using the User Name or Personnel Number.

- **Organizational Details:** Shows the details stored against the position associated with the staff member

- **Enterprise Structure:** Provides information on the employee's duty station (personnel subarea) and the type of employee (category or employee subgroup).

User or Employee Search

User:	EE124083	Bategeka ROSINA
Personnel No.:	00124083	Bategeka ROSINA
Fund:	HR999	
Cost Center:		

Organizational Details

Position:	30033356	G4 4550 MAIL ASSISTANT
Org. Unit:	20000112	DM OCSS FCSD CAS SSS MES
Payroll area:	L1	
Business Area:	U999	Umoja SAP Tech. Config.

Enterprise Structure

Personnel area:	US00	United States
Pers. subarea:	US00	United States
EE group:	2	Local Staff
EE subgroup:	GS	General Service

My Approvers | My Access | Workflow Guide | Enterprise Roles | Parameters

View: Default ▼ | Export ▾ | Filter Settings

Relationship	Index Number	Employee Name	SAP Login ID	Email	Amount Group
Budget Manager	6683515	Esala EDIGER	INSTRUCTOR03	someone@someone.com	
	771091	Fleury JERRELL	INSTRUCTOR05	someone@someone.com	
	60256591	HARRIETT AKILAH	INSTRUCTOR04		
	92123306	Hongtao EVANCHYK	INSTRUCTOR02	someone@someone.com	
	95756737	Ihumure Calvin BUNCE	INSTRUCTOR01		

umoja
training
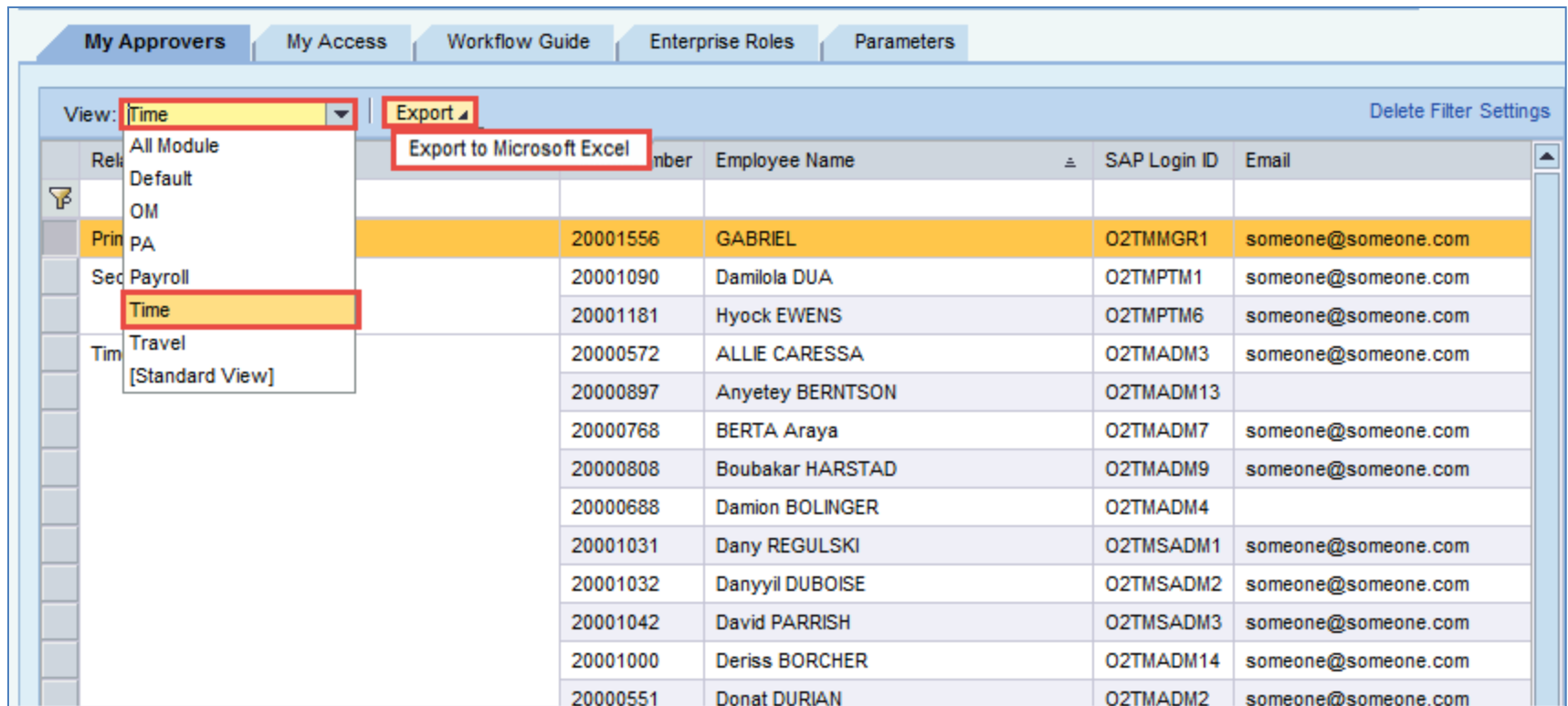
Home Page – My Approvers

- **My Approvers:** Displays Managers, HR Partners and Administrators associated to the user on the basis of their structural localization (office, organizational unit and position. e.g. MINUSTAH, Human Resources, Recruitment Assistant)

Relationship		Index Number	Employee Name		SAP Login ID	Email	Amount Group
HR Partner - All		20030215	Dagimawe DRUM		O2PTNRALL2	someone@someone.com	
		20029954	Ignace MARASHIO		O2PTNRALL1	someone@someone.com	
HR Partner - Entitlements		20036610	Brody FONOHEMA		O2PTNRENTL1	someone@someone.com	
		20036711	Daler DRY		O2PTNRENTL3		
		20036696	Delin REINHOLT		O2PTNRENTL2	someone@someone.com	
HR Partner - Local Staff		20032287	Bi BLACKSHIRE		O2PTNROTH3	someone@someone.com	
Primary Time Managers		20001556	GABRIEL		O2PTNROTH1	someone@someone.com	
Secondary Time Manager		20001090	Damilola DUA		O2PTNROTH2	someone@someone.com	
		20001181	Hyock EWENS		O2PTNRPAC1	someone@someone.com	
Time Administrator		20000572	ALLIE CARESSA		O2PTNRPAC3	someone@someone.com	
		20000897	Anyetey BERNTSON		O2PTNRPAC2	someone@someone.com	
		20000768	BERTA Araya		SKUMAR		
		20000808	Boubakar HARSTAD		O2OMADMIN2	someone@someone.com	
		20000688	Damion BOLINGER		O2OMADMIN3	someone@someone.com	

View: Default | Export | Filter Settings

My Approvers | My Access | Workflow Guide | Enterprise Roles | Parameters

Home Page – My Approvers

- By clicking on the **View** field drop down menu, it is possible to filter the Approver list according to Approver type (i.e. Time, Travel or Personnel Administration).

- It is also possible to Export the Approver List and save it as a Microsoft Excel file.

Home Page - User Map

- **My Access:** Lists all the user's own roles. These roles determine the tabs the user will have on the Role Toolbar.

	Relationship	Start date	End Date	Description	Organization	Fund	Cost Center	Business Area	A
	HR Partner – All	01.01.2014	01.01.9999	UNS	20000002			*	
	HR Display – All	01.01.2014	01.01.9999	UNS	20000002			S100	
	OM Administrator	01.01.2014	01.01.9999	UNS	20000002			*	
	Payroll display	01.01.2014	01.01.9999	UNS	20000002			S100	
	HR Display – All	01.01.2014	01.01.9999	MINUSTAH	20007630			P012	
	Time Administrator	01.01.2014	01.01.9999	MINUSTAH	20007630			P012	

My Approvers | **My Access** | Workflow Guide | Enterprise Roles | Parameters

Home Page - User Map

- **Workflow Guide:** Displays which Enterprise Role can initiate a request and which is the corresponding approver.

My Approvers	My Access	Workflow Guide	Enterprise Roles	Parameters	

| Workflow Guide: | Personal D ▼ |

	Workflow Steps	Step Details	Option 1	Option 2
	1	Users having following roles can create the request	ESS	HR Partners
	2	Users having following roles can approve the request	HR Partners	HR Partners PA & Contracts

umⓊja
t r a i n i n g

Workflow in ESS Portal

- Workflows in ESS always start when a request is submitted by an employee.
- Some actions do not require any approval by a Manager or HR Partner.
- If the activity requires an approval, then the request is sent, via workflow, to the appropriate approver for his/her action

3. The Staff Member modifies and resubmits the Leave Request

1. The Staff Member submits a Leave Request

2. The Manager reviews and rejects the Leave Request

4. The Manager reviews and approves the Leave Request
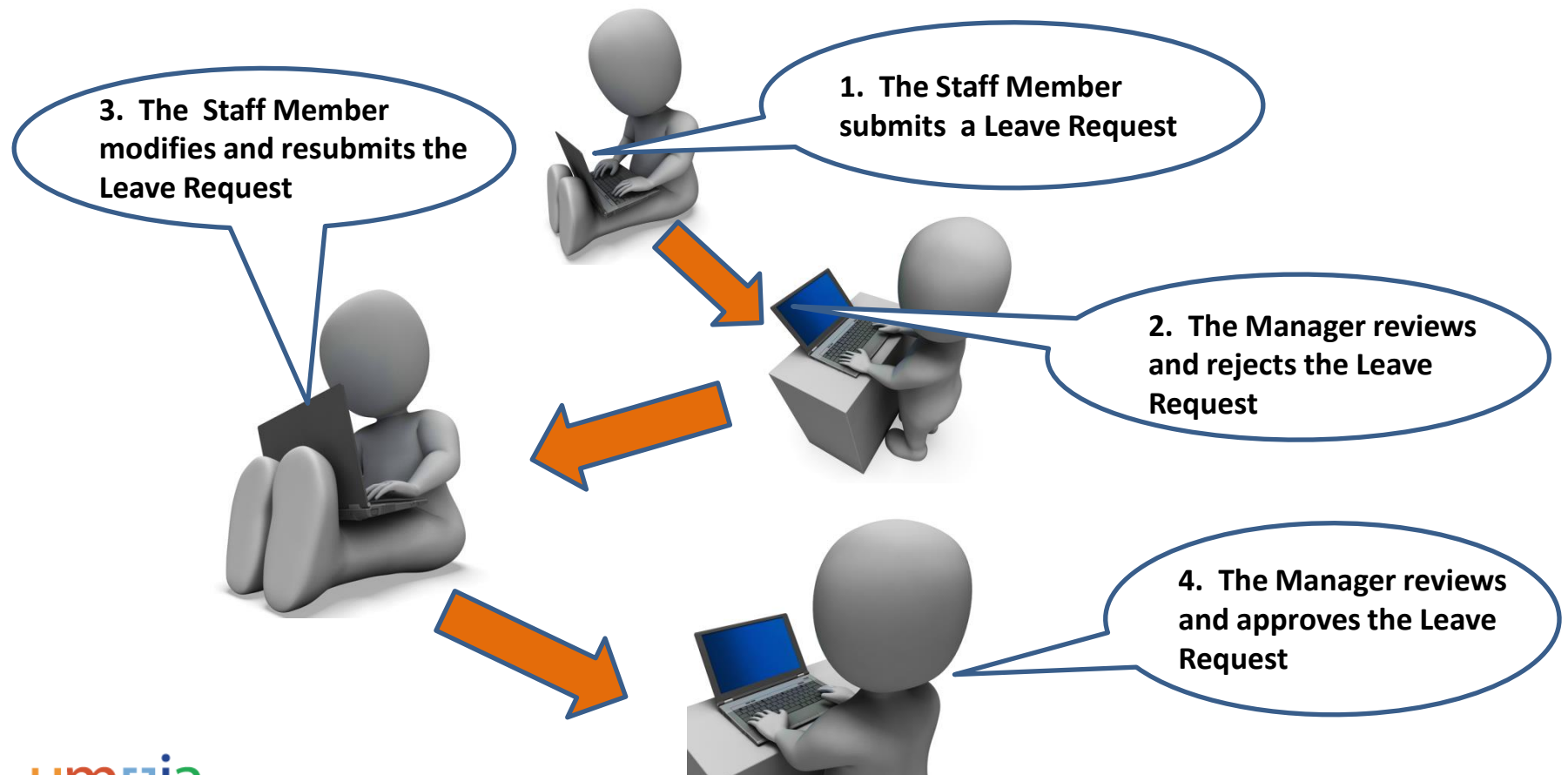
Workflow in ESS Portal

- Some workflows require a 2-level approval or approval by an external entity (e.g. Medical Service).

3. The HR Partner reviews the request, verifies the eligibility and approves it.

1. The Staff Member submits a Special Leave w/pay Request

2. The Manager reviews and approves the Request

Workflow in ESS Portal - Example

- In this example the employee submits a request for an attendance (Overtime).

- After clicking the OK button, the request will be routed to the appropriate Manager for his/her action.

Workflow in ESS Portal

- Workflows that require approval are routed to the approver's Approver Work Center (**Employee Self Service** ➡ **Home** ➡ **Approver Work Center** ➡ **Time Pending Items**).

- A number of approvers may be mapped to an org unit and requests will appear in the Work Center of all approvers. When an approver accesses the task it will disappear from the worklist of the other approvers.

Workflows in ESS Portal

- From the **Approve** request screen, the Approver can either Approve or Reject the request.

- For **1-level** approval workflow, the process is completed when the Approver approves the request.

- For **2-level** approvals workflow, the first approval will automatically route the document to the next approver.   The approval may also be required from an external entity (e.g. Medical Service through interface with the EarthMed system).

Warning - Payroll Lock

- Close to the end of each month, when the payroll is calculated, the Payroll Control Record will be set in a "Released for Payroll" status.

- The "Released for Payroll" status blocks all changes for periods that are on or before the end date of the "Released Payroll". Therefore, if an employee initiates any request that may cause a change in payroll (e.g. Add a Dependent, Request Rental Subsidy) this request will be suspended until the Payroll Lock is released.

- In other words, during the Payroll Lock period (approximately 3 days), employees will be able to submit their requests in the Umoja Portal, but transactions that may cause changes in payroll (e.g. request for rental subsidy) will not be available to the Approvers until the Payroll processing is completed.

Warning - Payroll and Employee Lock

- During Payroll Lock it is not possible to initiate any Time related process. Therefore, if you need to submit any Absence or Attendance request during a Payroll Lock period, it is recommended to seek approval for this transaction offline and record the Absence/Attendance in Umoja as soon as the Payroll Lock is released.

- In addition, while an HR Partner is updating an employee's record the system locks the record of this employee to avoid two individuals updating the record at the same time.

- If the employee tries to submit any transaction while an HR Partner is updating his/her record, the system will display a warning message. It will be sufficient to wait a few minutes giving the HR Partner the opportunity to complete the work and the record will be unlocked and available again.

Umoja Employee Self Service SM

- Via the Employee Self Service SM tab, staff can access all the Employee Services (functionalities) available to their employee group (e.g. in the Entitlements area, the link to "Apply On-line" for Rental Subsidy will appear only if the staff member's employee group is "International").

Umoja ESS – Key Differences in Procedures

- The Umoja Portal shares the same database as the Umoja ECC. No dual maintenance or reconciliation of data is required.

- When entering their information and requests in Umoja, Staff assume higher responsibility/accountability for their own data due to self-service/self-certification.

- When not asked to produce an original document, Staff members are required to retain original documents for a specified number of years (generally 5 years) for monitoring and auditing purposes.

- Upon approval, Staff records are automatically updated, Staff can view their own data at anytime and update them when required.

- Each Area of the Employee Self-Service page will be explained in detail in a dedicated online course.
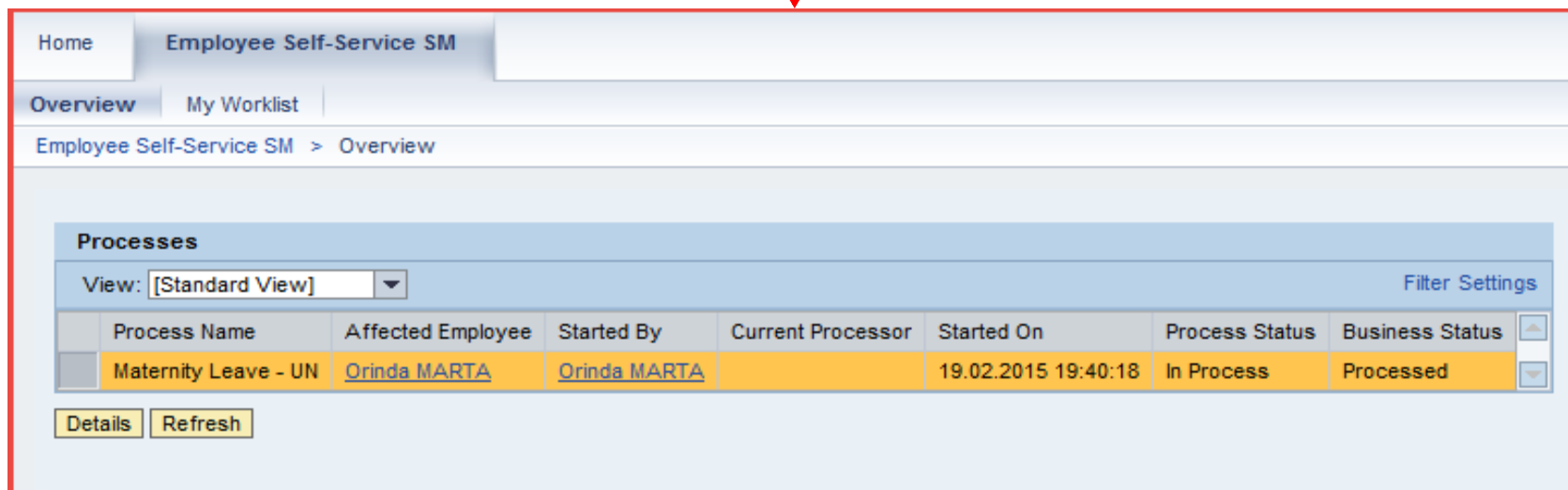
Umoja Employee Self Service SM

- In the **Employee Self Service SM – Status Overview:** Employees can view the status of their open processes.

Umoja Employee Self Service SM

- You can see additional information about your transaction by clicking on the **Details** button
- Click the **Refresh** button to see newly submitted transactions.

Umoja Employee Self Service SM

- In the **Employee Self Service SM – Entitlements** area, employees can add/modify a **Dependent**, display/update **Rental Subsidy** and submit both **Travel** and **Time** requests in connection with an entitlement travel.

- **NOTE**: the **Education Grant** form will be available in ESS at a later date.

Entitlements

In this area, you can access to your entitlements

Add Dependent/Household Members

Dependency benefits are paid to staff members upon UN recognition of an eligible spouse, child or secondary dependent (parent or sibling). Dependency benefits are paid either as 'dependent rate' of base salary and post adjustment, or in the form of a flat allowance.

[Apply On-line][Application History][More Information]

Education Grant

This service is currently unavailable. Please contact your HR Partner to submit a new application and to settle prior applications. You will be notified when this becomes available in ESS

Entitlement Travel

Eligible staff members may qualify for Travel on Home Leave, Family Visit, R&R and Reverse EGT. First submit your leave request and only after its approval, submit the relevant travel request.

Create Leave Request
You can request leave and other types of absences here
Create Entitlment Travel
You can create or change entitlment travel request

Rental Subsidy

The rental subsidy and deduction scheme is designed to provide equity in acommodation expenses among UN staff in duty stations where rents vary consideraby, and to alleviate hardships of staff facing higher than average rent costs for reasonable standard accommodations.

[Apply On-line][More Information]

Umoja Employee Self Service SM

Entitlements tab for "Local" General Service staff member:

- Note that the staff member can view information on Rental Subsidy, but cannot apply for this entitlement. However, the "Apply On-line" link is active for dependency.

Umoja Employee Self Service SM

In the **Employee Self Service SM – Life and Work Events** area, employees can review the list of tasks he/she will be required to undertake in connection with a life event (i.e. marriage, birth of a child), or a work event (join the UN as a new Staff Member). By clicking on the active link, you can access the form to initiate these processes.

Life and Work Events

Back

▼ Service Map

Work Events
Annual Declaration
Confirm or modify your personal information
On Boarding
Bring applicants into the active staff member status

Life Events
Add/Modify a Dependant
Add a family member (spouse, child or parent) as a dependant, eligibility must first be established
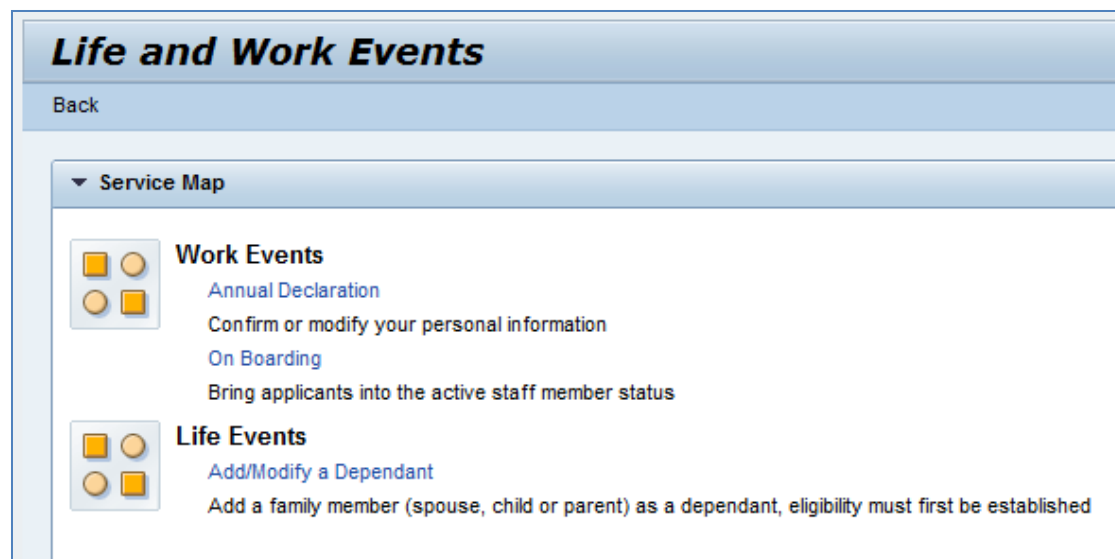
NOTE: The Life and Work Events area also enables staff to update all forms in connection with their Annual Declaration (an annual process to confirm or update personal data, information on dependents, rental subsidy and beneficiaries).

Umoja Employee Self Service SM

In the **Employee Self Service SM – Personal Information** area, employees can view/add/change their: Personal Data (marital status, nationality), Addresses and Emergency contacts, Beneficiaries, Dependents, and Banking information. Some processes have a workflow to an Approver.

The **Employee Self Service SM – Career and Job** area provides a link to Inspira where employees can view/apply for UN job openings, as well as create/complete ePerformance documents, and view/enroll in training opportunities, etc.

Umoja Employee Self Service SM

In **Employee Self Service SM – Time Management** area, employees can:

▸ Request Maternity Leave

▸ Review and certify attendance/absence in the Monthly/Annual Time Summary

▸ Create/view Leave Request, i.e., Annual Leave, Home Leave, Sick Leave, Paternity Leave, CTO, R&R, etc.

▸ Access policy information related to absence/attendance.

Time Management

Back

▼ Service Map

Special Leave Request
Create Special Leave Request
Maternity Leave Request
Female staff members who have received medical certificate from their doctor with expected date of delivery can use this service, to request maternity leave. If the maternity leave reuqest is outside the maximum/Minimum (6 weeks/ 2 weeks) pre-delivery period, please bring this to attention of the Human Resources.

Timesheet
Certify Monthly Time Summary
You can correct errors that originated due to incorrect entries at the time recording terminal
Certify Annual Time Summary
You can correct errors that originated due to incorrect entries at the time recording terminal
Annual Time Statement for Previous Years
You can correct errors that originated due to incorrect entries at the time recording terminal

Important Information for Staff Members
Human Resource Handbook
Administrative Instruction for time recording ST/AI/1999/13

Staff Regulation on Annual and special leave: 5.1 to 5.3

for Support contact helpdesk

Email:- helpdesk@umoja.un.org

Absence and Attendance Request
Create Leave Request
You can request leave and other types of absences here.
Leave Overview
You can display the Leave Overview and review, change, or delete existing leave or other types of absences here. You can also request additional leave.
View Absence Balances
You can diaplay your absence balance information here.s

Umoja Employee Self Service SM

In the **Employee Self Service SM – Benefits and Payment** area, employees can:

- Enroll in health, dental and life insurance plans, change the current family status of the plan, and print a form with the enrolled plans

- Display the most recent salary payments, display planned recoveries, and simulate any possible changes in salary, allowances, subsidies and deductions.

Benefits and Payment

Back

▼ Service Map

Benefits

Participation Overview
In this area you can view the health and life insurance plans in which you are enrolled.

Confirmation form
Once you have completed your health and/or life insurance selection you may print a confirmation statement for your records.

Payment

Display Salary Statement
You can view your most recent salary statement here.

Display Planned Recoveries
You can create or change Official Travel Requests.

Payroll Simulation
You can simulate changes to your salary, tax data, and social insurance data, and see how it would effect your salary statement here.

Additional Information

Our website can provide you detailed information regarding the Health and Life Insurance options available.

Health and Life Insurance website

Umoja Employee Self Service SM

In the **Employee Self Service SM – Travel, Shipment and Expenses** area, employees can:

- Create requests for: **Official Travel, HR Travel, Entitlement Travel,** and **Shipments.**

- Create **Expense Reports**, and request cancellation of a submitted travel or shipment request

- Display travel guidelines and policies.

- This screen also contains links to external sites, such as the Department of Safety and Security (DSS) to raise travel security clearance (TRIP) requests.

Travel , Shipment and Expenses

Back

▼ Service Map

Overview
Traveler Work Center
You can create, change/edit, display/print, request cancellation and delete travel requests, shipment requests and expense reports.

Create Travel Request
Create Official Travel
You can create or change official travel requests
Create HR Travel
You can create or change hr travel requests.
Create Entitlement Travel
You can create or change entitlement travel requests
Create Group Travel (for uniform personnel and meeting participants ONLY)
You can create or change group travel requests.

Create Shipment Request
Create Unaccompanied Shipment Request
You can create or change unaccompanied shipment

Create Expense Report
Create Expense Report
You can create or change expense reports.

Create Travel Plan
Create Third-Party Travel Plan
You can create or change travel plans.

Travel Documents
Online Help
Online Training
Official Travel Policies and Guidelines
Security Clereance
Medical Clearance

Learning Checkpoint 1

Which of the following actions can you perform in the User Map?

Select the correct option.

A.   Search for employees using their Personnel Number

B.   Search for employees using their User Name

C.   View an employee's Personal Information

D.   View the organizational information of an employee

Learning Checkpoint 1

Which of the following actions can you perform in the User Map?

Select the correct options.

A. **Search for employees using their Personnel Number**

B. **Search for employees using their User Name**

C. View an employee's Personal Information

D. **View the organizational information of an employee**

Options A, B and D are the correct answers. The User Map is used to search for employees using either their Personnel Number or their User Name, and their organizational information is displayed.

umoja
training

Learning Checkpoint 2

How can a user learn who is the HR Partner who will process his/her request for entitlements?

Select the correct option.

A.   In the Employee Self Service tab under Entitlements Area

B.   In the Employee Self Service tab under Personal Data Area

C.   In the Home page under User Map

D.   In the Home page under Approver Work Center

Learning Checkpoint 2

How can a user learn who is the HR Partner who will process his/her request for entitlements?

Select the correct option.

A. In the Employer Self Service tab under Entitlement Area

B. In the Employer Self Service tab under Personal Data Area

C. In the Home page under User Map

D. In the Home Page under Approver Work Center

Option C is the correct answer. In Umoja ESS a S/M can view the list of his/her Approvers, HR Partners and Administrators on the User Map page under the My Approver tab

Module 2 Summary

The key points covered in this module are:

- All Staff members have access to two main pages in the Umoja Portal: the **Home** page and the **Employee Self Service** page.

- The **Employee Self Service** page provides access to all the functionalities available to an employee according to his/her employee group.

- The **Home** page under **User Map** area, provides employees' Personnel and Enterprise structural information, and displays the roles assigned to the Staff Member in Umoja, the list of Approvers associated with the Staff Member, as well as Workflows in Umoja ESS that route documents from a User to the appropriate Approver (and reverse).

- Under the Home Page employees can access the **Approver Work Center** which displays a combination of common tabs depending on the roles assigned to the Staff Member in Umoja

Agenda

Course Introduction
Module 1: Umoja ESS Navigation Fundamentals
Module 2: Umoja ESS Additional Features and Functionalities
Course Summary
Course Assessment
Course Survey

Course Summary

The key points covered in this course are:

- All Staff members are automatically granted the role of ESS-Staff and have access to the Umoja Portal to perform processes available under Employee Self Service.

- Staff Members who are also assigned additional roles to execute tasks in the Umoja Portal are provided access to their dedicated Areas through separate tabs.

- Staff Members who are assigned Approver/Manager roles can manage their workflow directly by accessing the Approver Work Center.

- The different functionalities available in the **Employee Self Service** page are detailed in the respective Computer Based Training courses.

- Staff assume higher responsibility/accountability for their own data due to self-service/self-certification.

- Staff members are required to retain original documents for a specified number of years (generally 5 years) for monitoring and auditing purposes.

Agenda

Course Introduction
Module 1: Umoja ESS Navigation Fundamentals
Module 2: Umoja ESS Additional Features and Functionalities
Course Summary
Course Assessment
Course Survey

Course Assessment

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

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

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

1. Log into Inspira

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

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

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

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

Agenda

| |
|---|
| Course Introduction |
| Module 1: Umoja ESS Navigation Fundamentals |
| Module 2: Umoja ESS Additional Features and Functionalities |
| Course Summary |
| Course Assessment |
| **Course Survey** |

Course Survey

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

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

1. Log into Inspira

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

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

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

5. Click the **Submit** button once you have completed the course survey
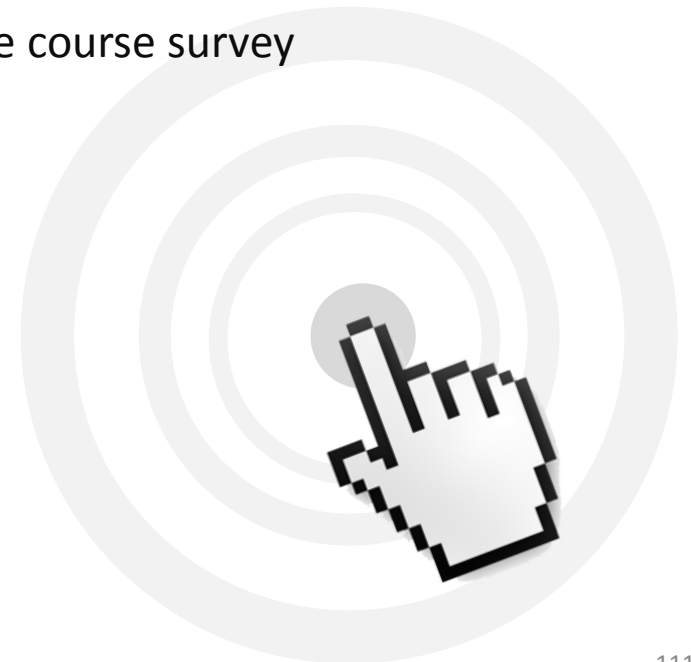
Congratulations! You have successfully completed the
Umoja ESS Basic Navigation **course.**

umɔja
t r a i n i n g