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Overview

This Job Aid covers the steps necessary to guide Users in the Organizational Management (OM) process of Loaning position, Modifying (extend and shorten) a loan and Returning position from loan.

Please refer to the OM Create position Job Aid to understand a Position, what it represents, its relationships to data objects, learn about position types, the description and which office has authority to manage each.

Governing Policies

I.   There are two groups of Position Types as follows:

1. **Positions created and controlled by OPPBA and OAHs** are established posts, temporary posts and General Temporary Assistance (GTA) posts funded by the peacekeeping support account, fund QSA, GTA Finite Duration and GTA Finite PK;

2. **Positions created and maintained by Entities** are funded by Voluntary Contributions (VC, formerly known as extrabudgetary, XB), GTA replacement and Temporary Assistance for Meetings (TAM).

II.   Changes in Position type

1. Positions funded by GTA funds are created as GTA replacement or GTA finite duration or GTA finite PK.
2. Positions funded by Voluntary Contributions (VC, formerly known as extrabudgetary, XB) are created as VC posts or VC project positions.

Please refer to the Policies on Position Maintenance for:

(i)   Positions controlled by OPPBA (Other than Field Missions); and

Position rules for positions controlled by OPPBA

Organization: Transfer across staffing table but within budget section (e.g. Dept) or Mission

	RB	QSA
Established posts	Loan**	N/A
Temporary posts	Loan	Loan
GTA finite duration and GTA PK	N/A	No

Organization: Transfer across budget Section (e.g. Dept) or Mission

ALL		

Geography: Transfer across Personnel Area (country) change

	RB	QSA
Established posts	Apprv/Loan**	N/A
Temporary posts	Apprv/Loan	Apprv/Loan
GTA finite duration and GTA PK	N/A	No

Function: Change of Functional title

	RB	QSA
Established posts	Temporary**	N/A
Temporary posts	Temporary	Temporary
GTA finite duration and GTA PK	N/A	No

Level: Change of Budgeted Grade

	RB	QSA
Established posts		N/A
Temporary posts		
GTA finite duration and GTA PK	N/A	

Legend	
Green	Allowed without approval from OPPBA
Yellow	Allowed after approval from OPPBA
Red	Not allowed, OPPBA Controller may approve exceptions

Subject to special policies (e.g. prudent vacancy management) and additional requirements by OHRM

** "Loan" and "Temporary" implies that the system keeps a link to the original budgeted object or value.

(i)　　　　Positions controlled by OPPBA (Field Missions).

Policies for Position Maintenance within Budget Period (Field Mission oriented)

Organizational change		Regular Budget*	Peacekeeping Budget**
Posts	Move within budget approved org unit		
	Move across budget approved org units		
	Loan within MISSION	Temporary	Temporary
	Loan across MISSION	Temporary	Temporary
GTA positions	Move within approved org unit	Temporary	Temporary
	Move across approved org units		
	Loan within MISSION	Temporary	
	Loan across MISSION	Temporary	

Geographical change		Regular Budget	Peacekeeping Budget
Posts	Within Country	Temporary	Temporary
	Across Country	Temporary	Temporary
GTA positions	Within Country	Temporary	Temporary
	Across Country	Temporary	

Functional change		Regular Budget	Peacekeeping Budget
Posts	Operational title, same Category and Grade***	Temporary	Temporary
	Operational title, different Category or Grade		
	Budgeted title	Change with new budget	
GTA positions	Operational title, same Category and Grade***	Temporary	
	Operational title, different Category or Grade		
	Budgeted title	Change with new budget	

Legend	
Green	Allowed without approval from OPPBA budget divisions
Orange	Requires approval from OPPBA budget divisions
Red	Not allowed. Controller may approve exceptions
Temporary	Until next budget period. Should be regularized or changed back to original.

* SPMs and Regular Budget funded PKMs e.g. UNTSO

** PKMs and PK Support Account

*** Same Grade refers to budgeted grade where the range FS1-FS6 (FSOL) are considered same grade. Similar for GS and LL.

　　Changes to titles within these ranges, while approved by OPPBA may be subject to HR policies and classification

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Job Aid Objective

With this Job Aid, you have a step-by-step guide that enables you to:

- Loan positions;
- Modify – extend and shorten – loaned positions;
- Return positions from loan;
- Understand the significance of the required fields/infotypes[1] in loaning positions and returning positions from loan;
- Check that all infotypes entered in the Portal is reflected in ECC.

[1]Infotype is an information unit used to maintain master data related to Umoja. An infotype has data entry fields that are classified as mandatory or optional. Some infotypes may be further categorized to different groups known as subtypes, which are based on themes.

Procedure

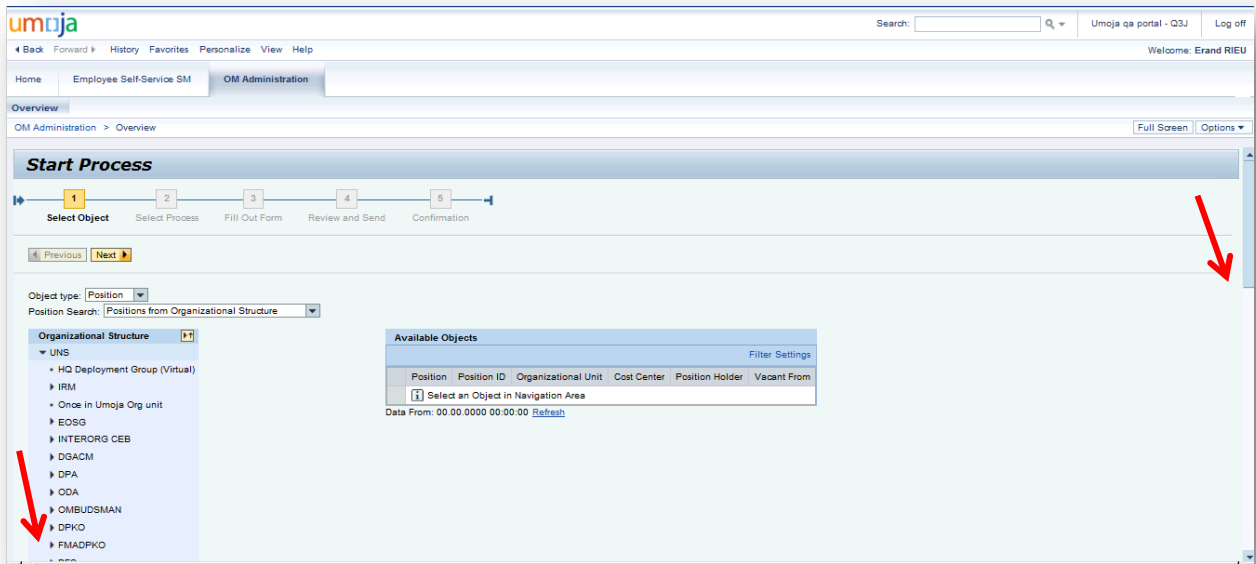1. Logging in the Portal with the enterprise role OM Administrator opens this screen:
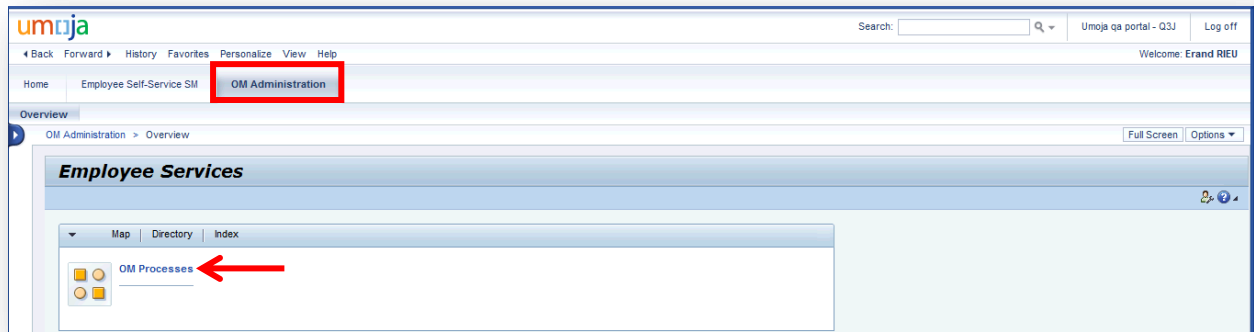
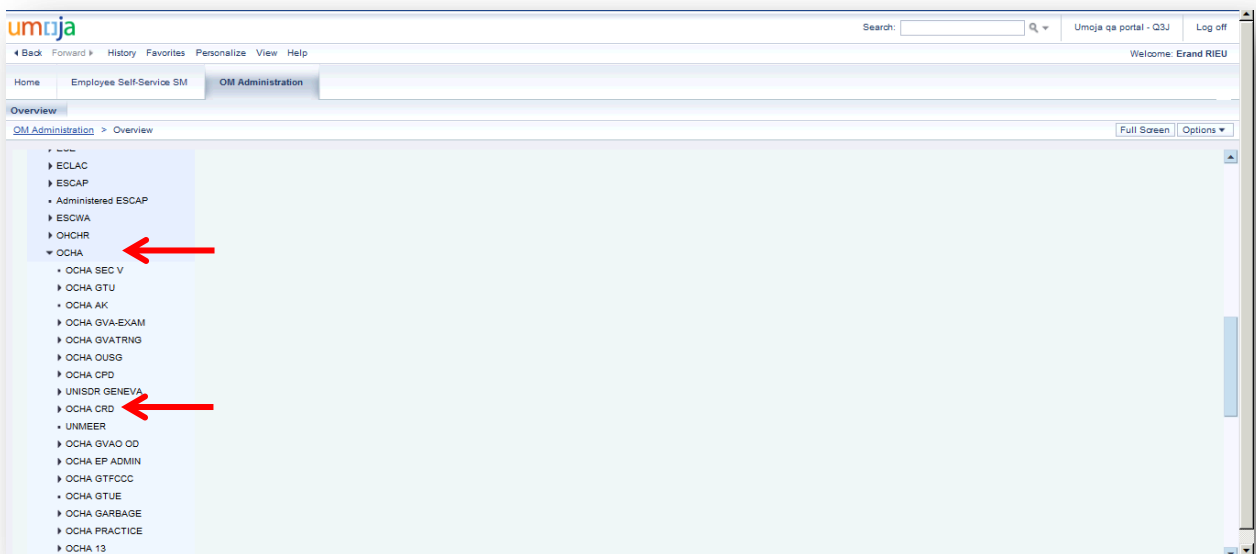2. In the screen above, click on OM Administration then on OM Processes which opens this screen:
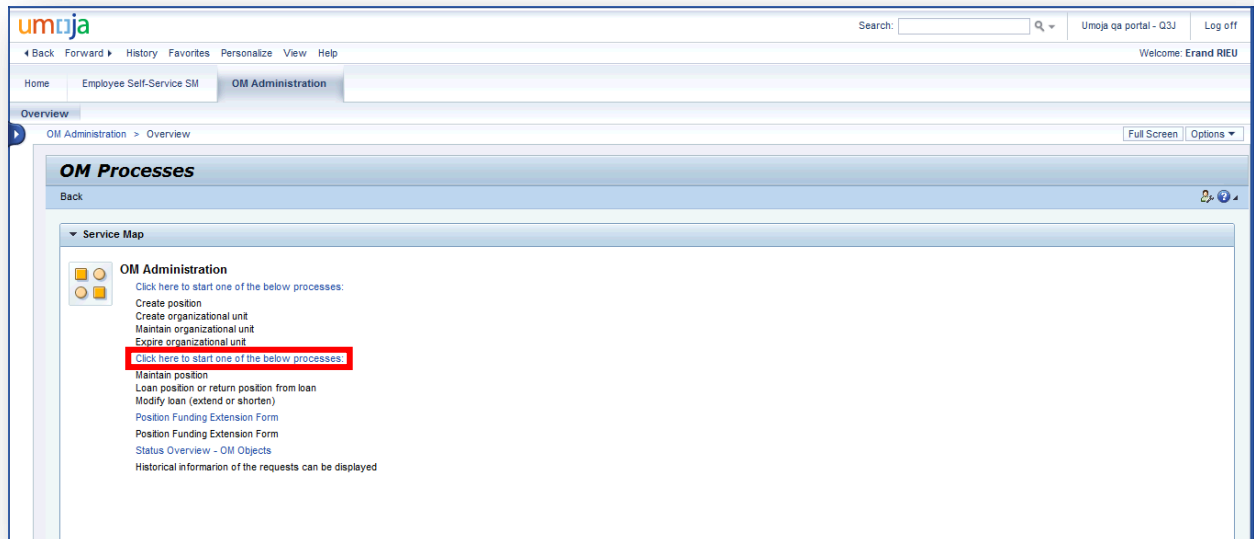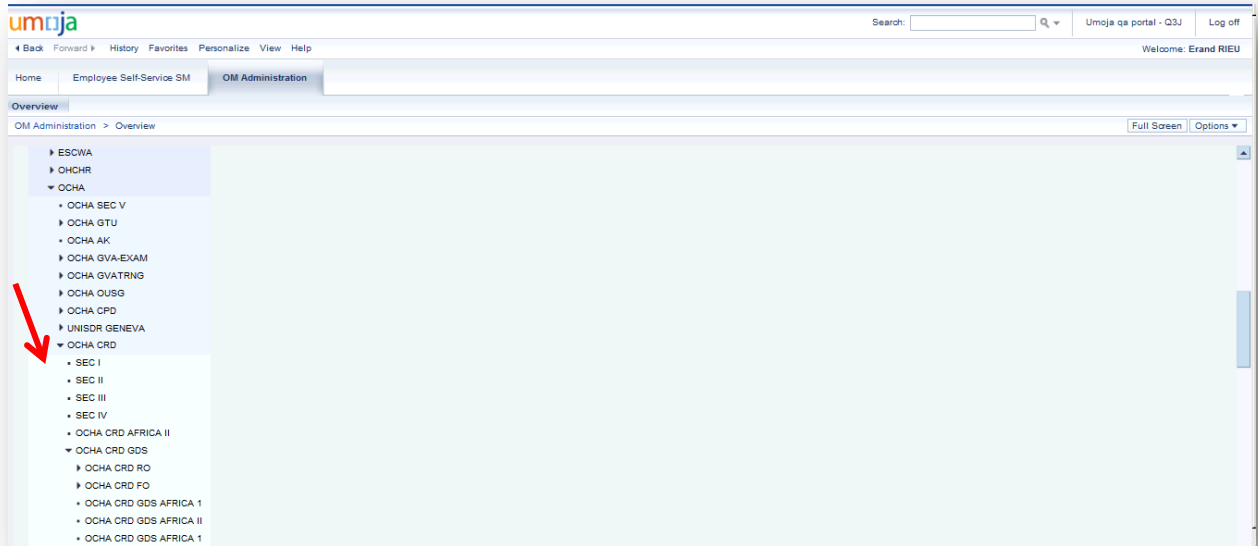

Loan Position

3. In the screen above, click on the blue text above the Loan position or return position from loan which opens this screen:

4. In the screen above, scroll down until you see OCHA which is beyond FMADPKO as shown in this screen:


5. In the screen above, clicking on OCHA turned the ► into a ▼ and opened the OCHA organizational structure. Click on OCHA CRD which opens the structure further down as shown in this screen:

6. In the screen above, keep scrolling down and select OCHA CRD GDS which opens the organizational structure further down that would eventually take you to the organizational unit where the position that has to be loaned is located. Select OCHA CRD GDS AFRICA II as shown in the screen below and scroll back up in order to see the positions in the org unit.
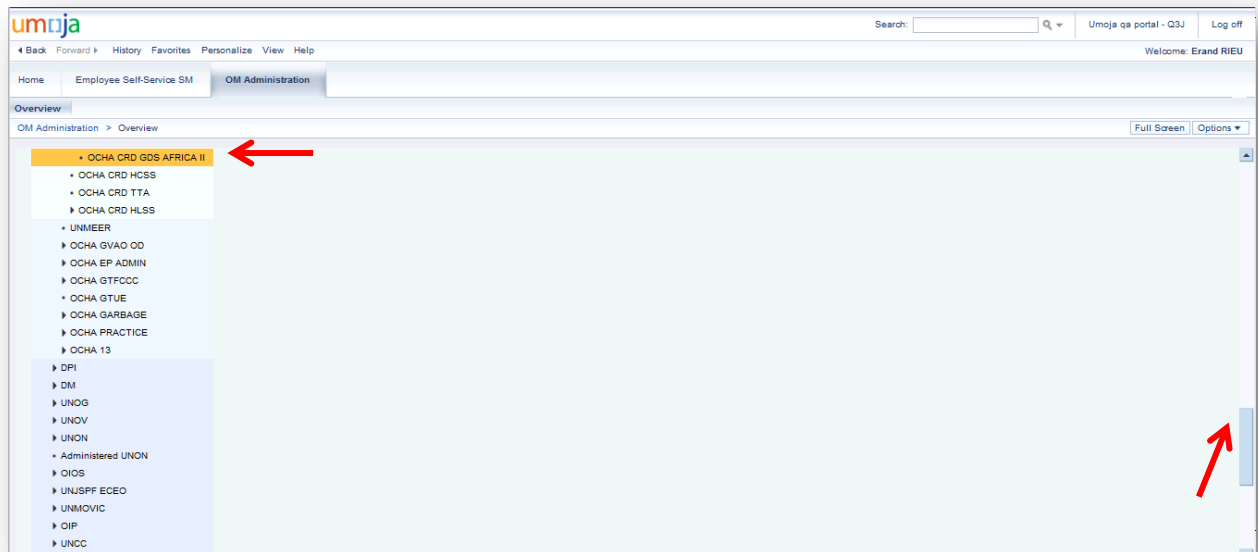
7. In scrolling back up, the screen below is what you will see. The name of the organizational unit in the "Available objects" box listing the position(s) confirms the organizational unit where the loan is from. The position ID, level and title allows identification of the post to be loaned.
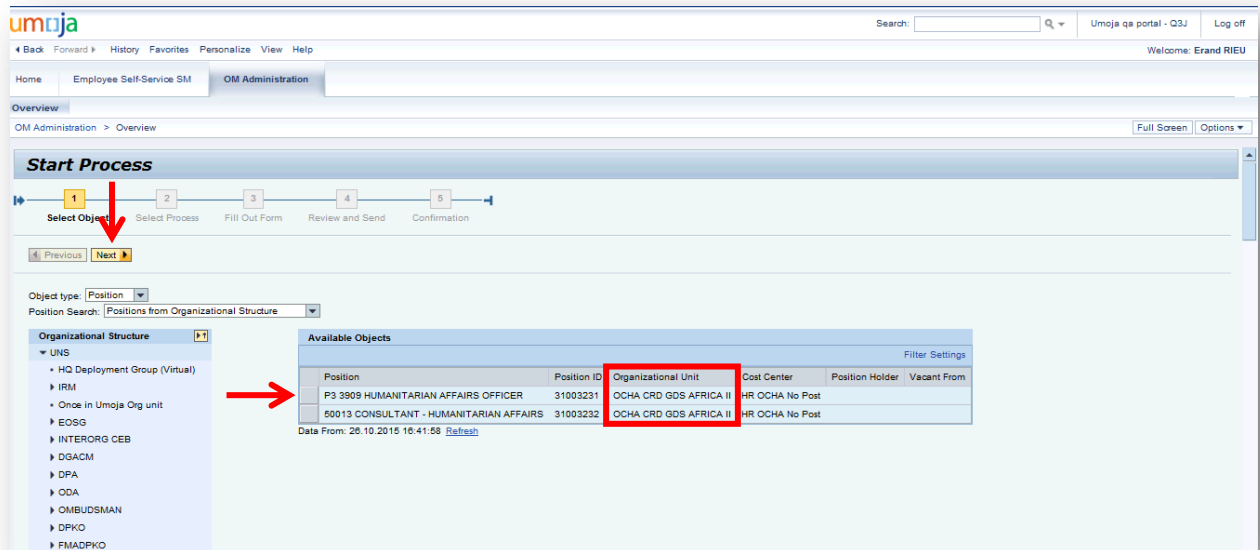
8. In the screen above, select position ID 31003231 and click [Next ▶] which opens the next screen:
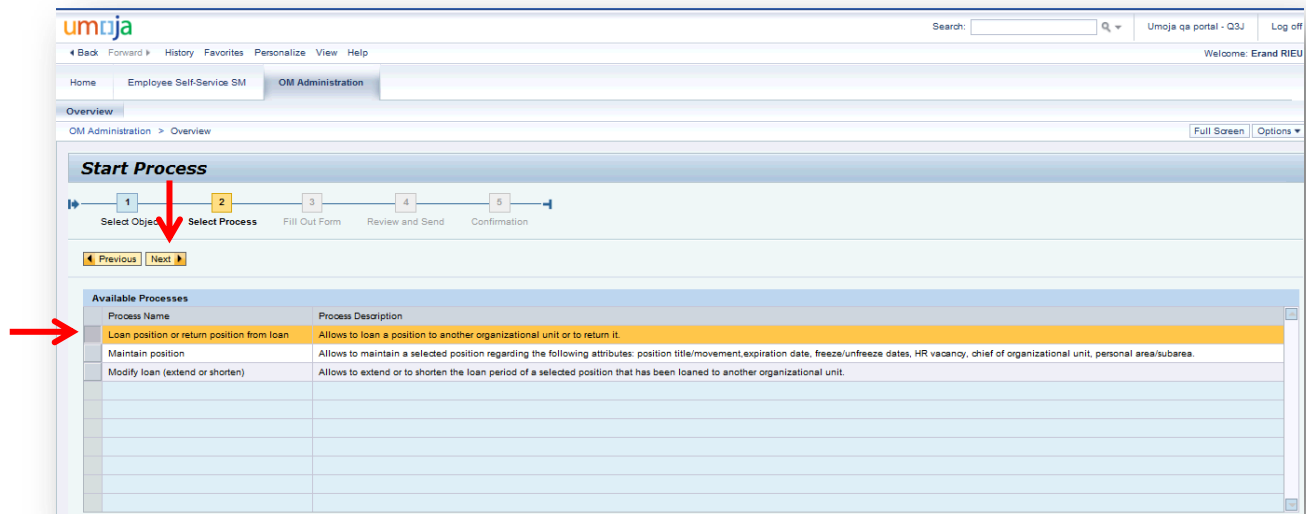
Note that the position for loan has to be valid and funded throughout the duration of the loan and has to be a position that an OM Administrator has authority to loan (ref. Position rules in page 4) or is a VC post, which is not covered in the position rules in pages 3 and 4.

9. In the screen above, select Loan position or return position from loan and click [Next ▶] which opens this screen:
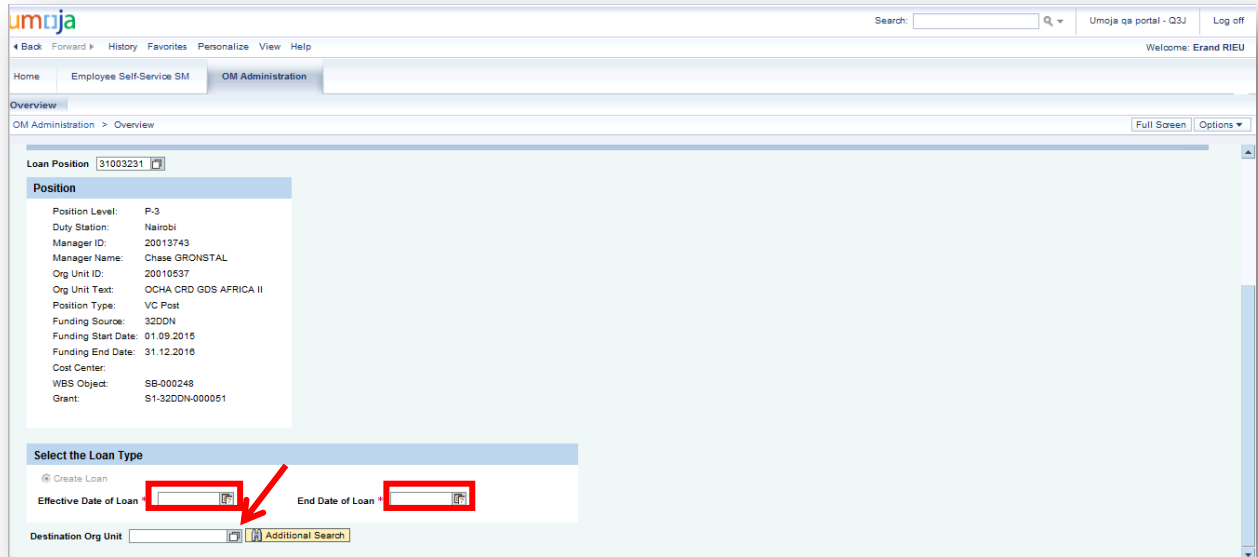
10. In the screen above, enter the effective date of the loan and the end date of the loan.

11. Click on the overlapping paper icon on the right of the Destination Org Unit field which opens this screen:
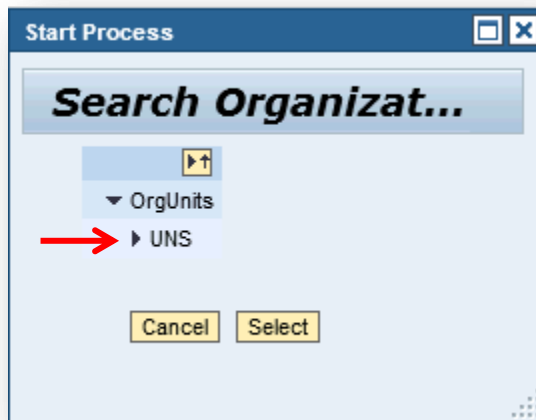
12. In the screen above, click on the ▶ on the left of UNS which opens this screen:

Start Process

Search Organizatio...

- ▼ OrgUnits
  - ▼ UNS
    - ▶ Alexander ALEJANDRO
    - ▶ Jessie AMBE
    - ▶ Poonam CHAUDHARY
    - ▶ Catherine DOBBELSTEIN
    - ▶ Ahmed EL-BOUKHARI
    - ▶ IRM
    - ▶ EOSG
    - ▶ INTERORG CEB
    - ▶ Once in Umoja Org unit
    - ▶ HQ Deployment Group (Virtual)
    - ▶ Mohammad Azam ALVI
    - ▶ Philippa ARNO
    - ▶ Mounia ATIKI
    - ▶ Lucila BEATO
    - ▶ Frantzy CHERILUS
    - ▶ DPA
    - ▶ DPKO
    - ▶ DGACM
    - ▶ ODA
    - ▶ OMBUDSMAN
    - ▶ Andrew BARASH
    - ▶ David CACERES GIRON
    - ▶ Christophe CHOLLET
    - ▶ Philip COMPTE
    - ▶ Marion DANKERS
    - ▶ DESA
    - ▶ FMADPKO
    - ▶ OSAA
    - ▶ DSS
    - ▶ DFS
    - ▶ Laura Patricia ALTINGER
    - ▶ Ganesh Kumar ANAND
    - ▶ Patrick ANDRADE
    - ▶ Yaowalak ANUPHAN
    - ▶ Christian COKER
    - ▶ OLA
    - ▶ UNHABITAT

13. In the screen above, scroll down until you see OCHA. Click on the ▶ before it which opens its organizational structure as shown in this screen:

14. In the screen above, scroll down then keep clicking until you see OCHA CRD GDS AFRICA I. Click on it, scroll down and click Select which opens this screen:
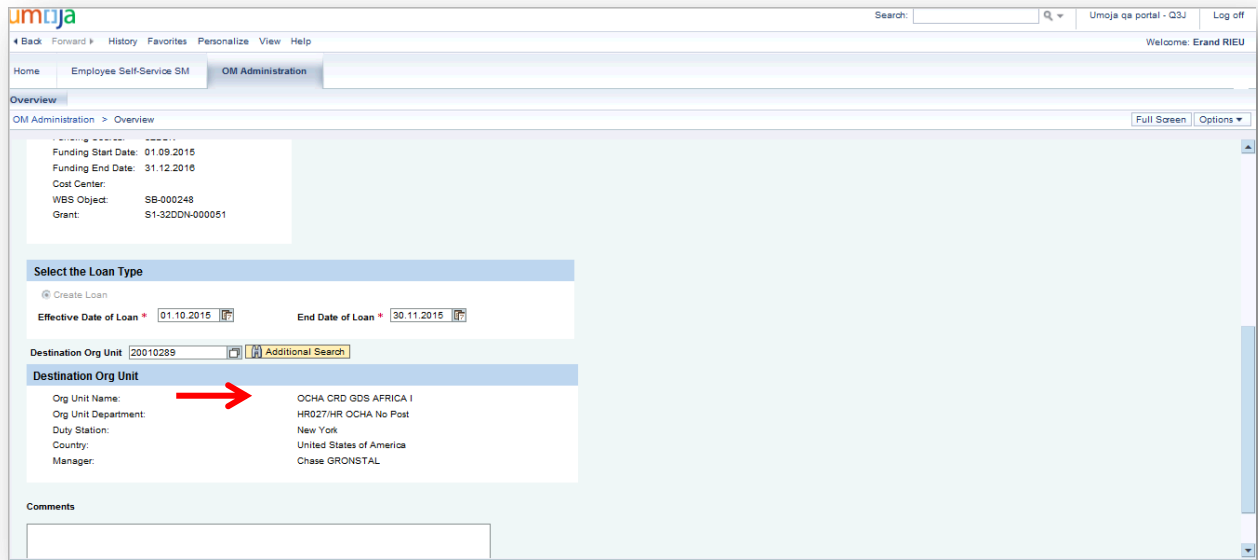
15. In the screen above, the Destination Org Unit number and its details along with the Comments box is shown. Enter the comments as shown in this screen:
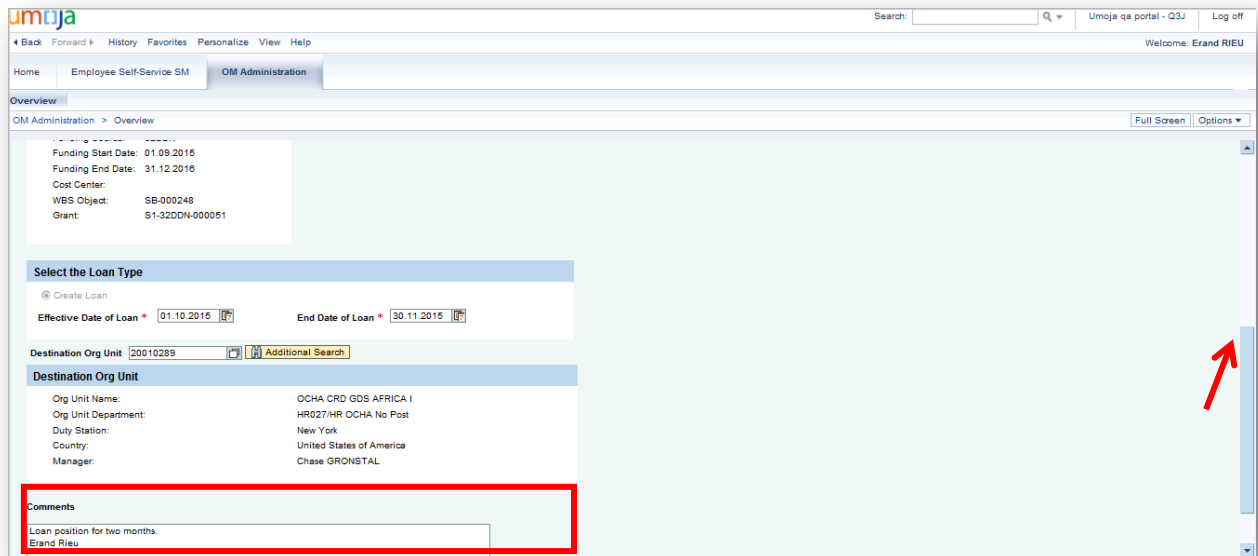
16. In the screen above, scroll back up and click [Next] which opens this screen:
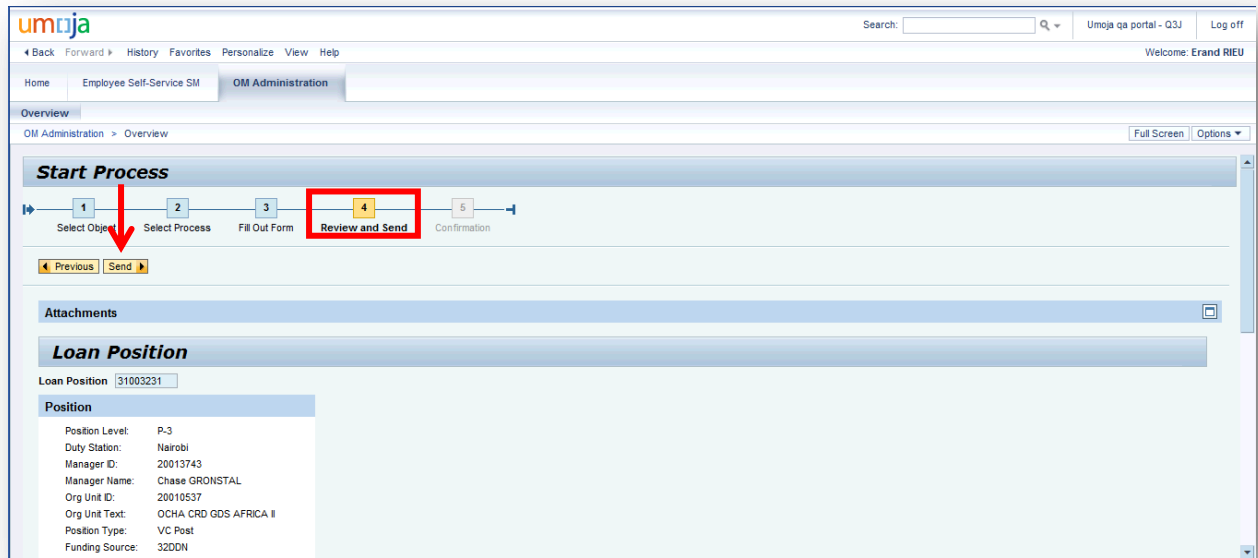
Note that the process progressed to "4 Review and Send".

17. In the screen above, click on **Send ▶** which opens this screen:
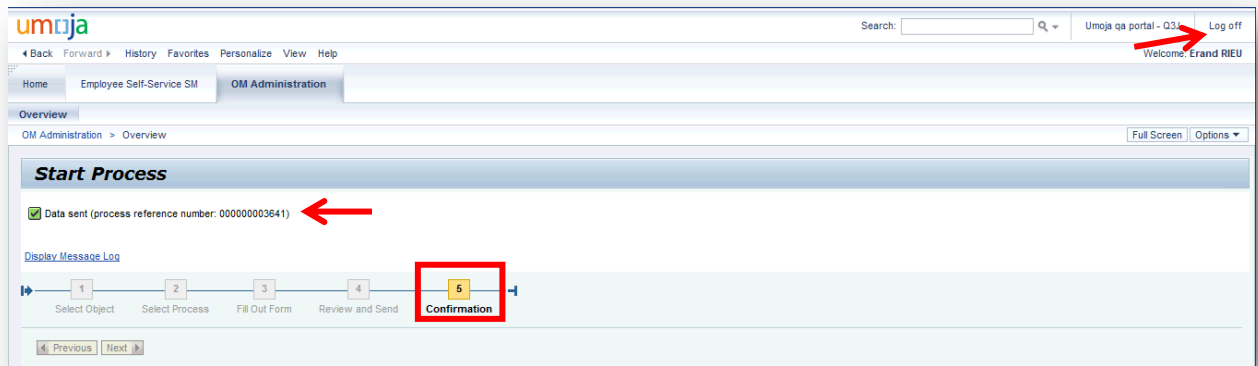
Note that the process progressed to "5 Confirmation". Jot down the process reference number, 3641.

18. Log off from Portal.

19. Log in to ECC. In the screen below, enter the Transaction code PO13d in the box

which opens the next screen.
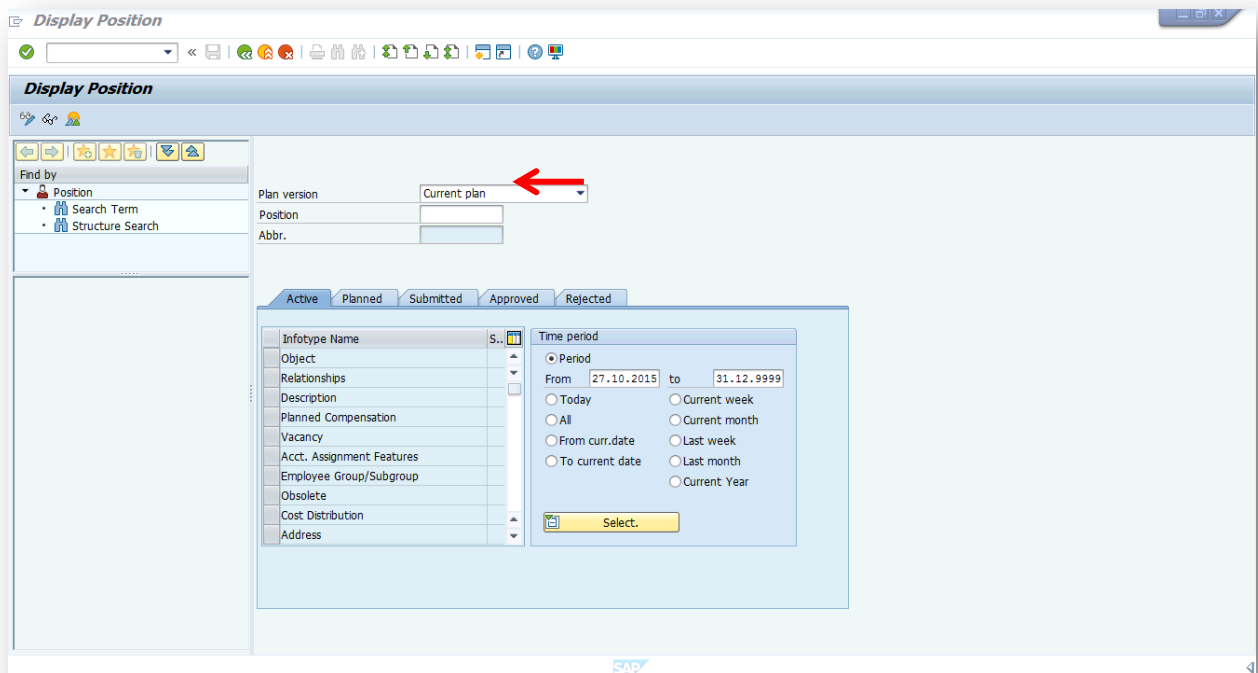
20. In the screen above, enter in the Position field the position number 31003231 that was loaned which opens this screen:
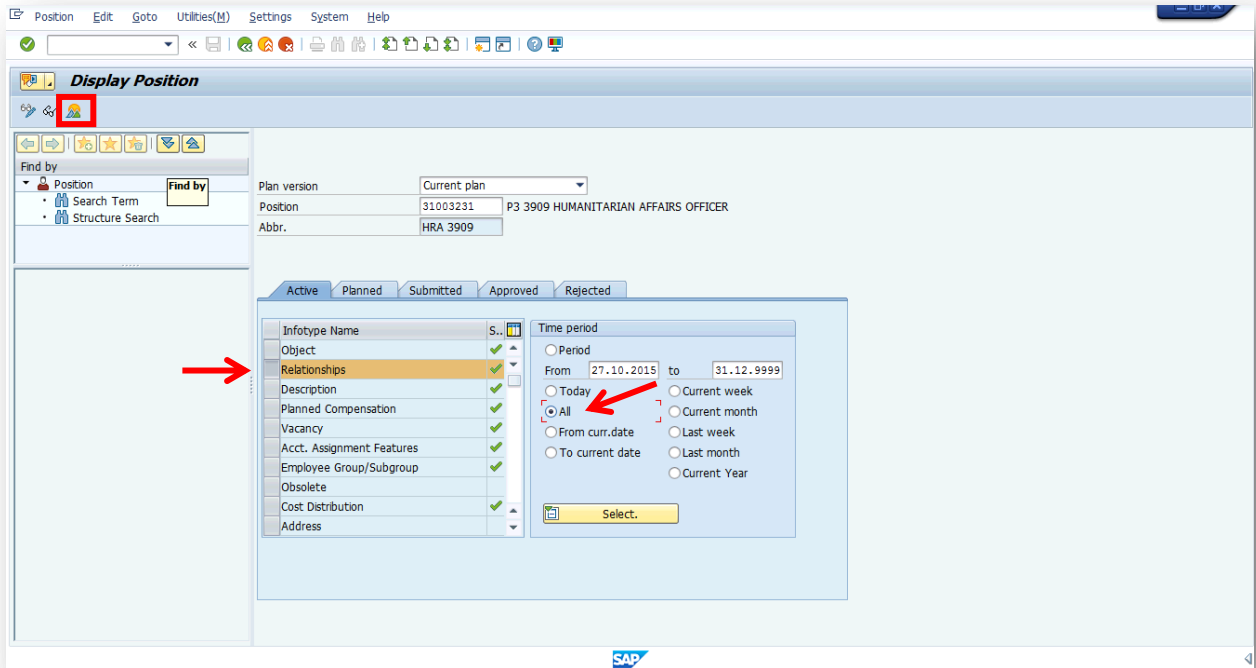
21. In the screen above, click on "All" in the Time period, select the Infotype Name, Relationships, and click on the icon which opens this screen:
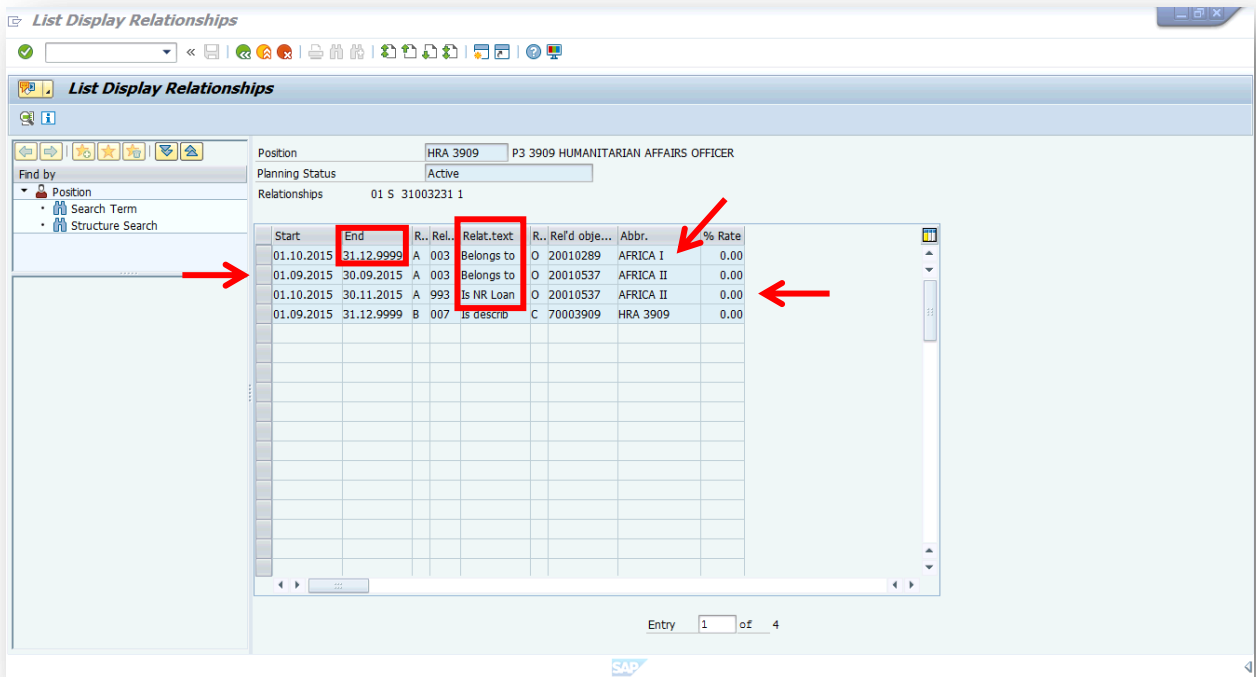
22. This is how the *List Display Relationships* above should be read:

In the 5th column from the left and the 3rd row from the top, "Is NR Loan" confirms the Loan Position from 01.10.2015 to 30.11.2015 that was effected in the Portal;
In the 2nd row from the top, "Belongs to" in the 5th column shows the revised start and end date of 01.09.2015 to 30.09.2015 when the position belongs to org unit 20010537 AFRICA II;
In the 1st row, "Belongs to" in the 5th column shows that from 01.10.2015, the position belongs to org unit 20010289 AFRICA I.

Note that:
The Start and End dates for each row/history of the position. Duration do not overlap and the end date and start date clearly describes how and where the position was utilized and currently used.
The end date of the 1st row is 31.12.9999. *In subsequent actions like Return from loan, the end date of the "Belongs to" the org unit 20010289 AFRICA I will change to 30.11.2015.*

Modify loan position - Extend

23. Repeat Steps 1 to 5. Step 5 opens to this screen:
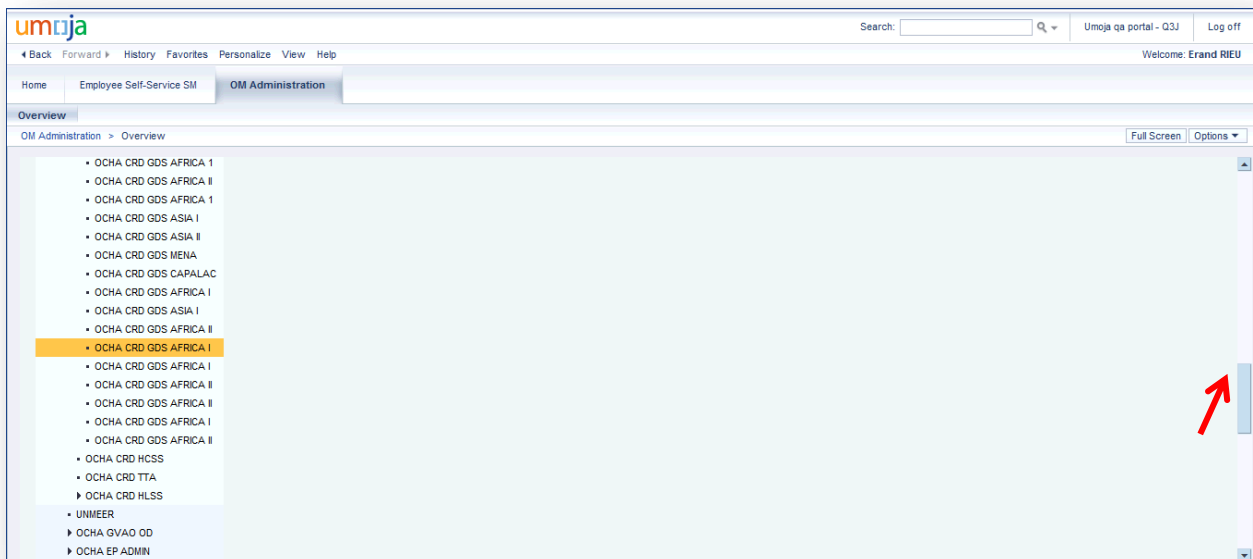
24. In the screen above, scroll all the way up to see this screen:
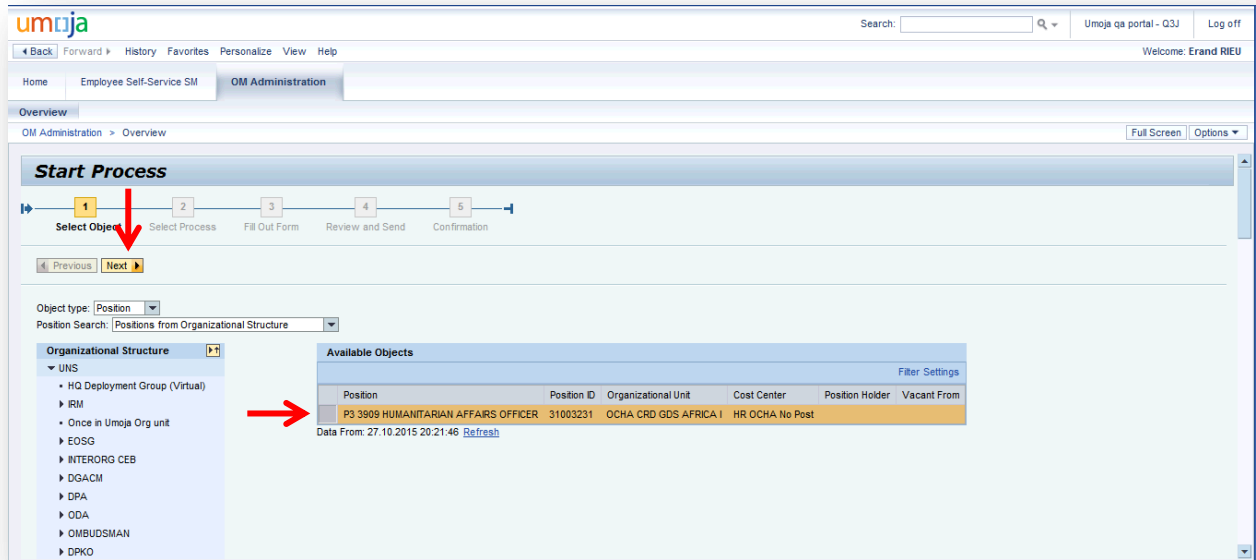
25. In the screen above, select position ID 31003231 and click [Next] which opens this screen:
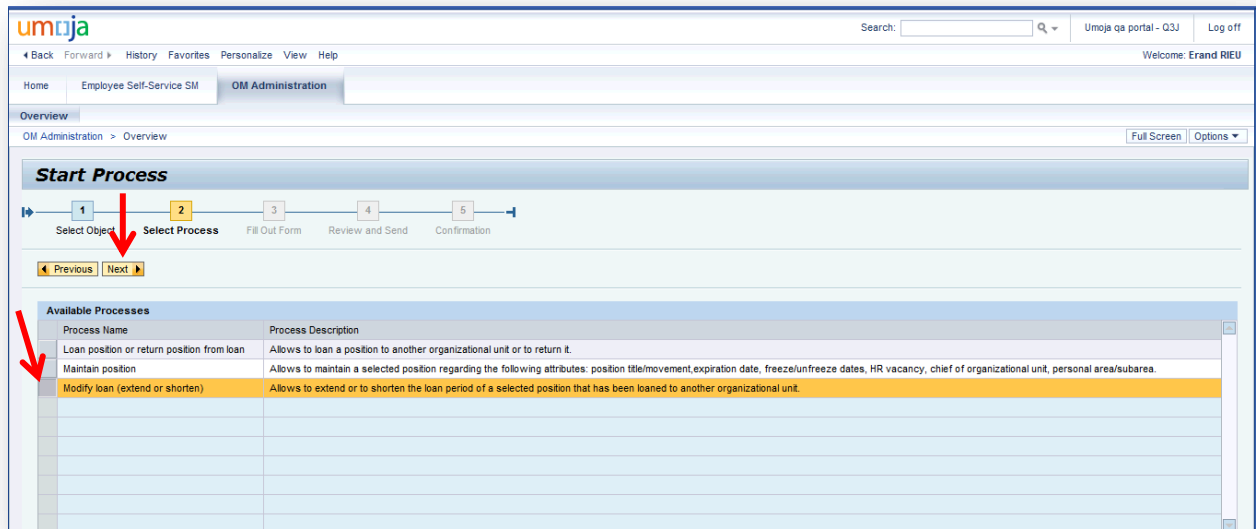
26. In the screen above, select "Modify loan (**extend** or shorten) and click [Next] which opens this screen:
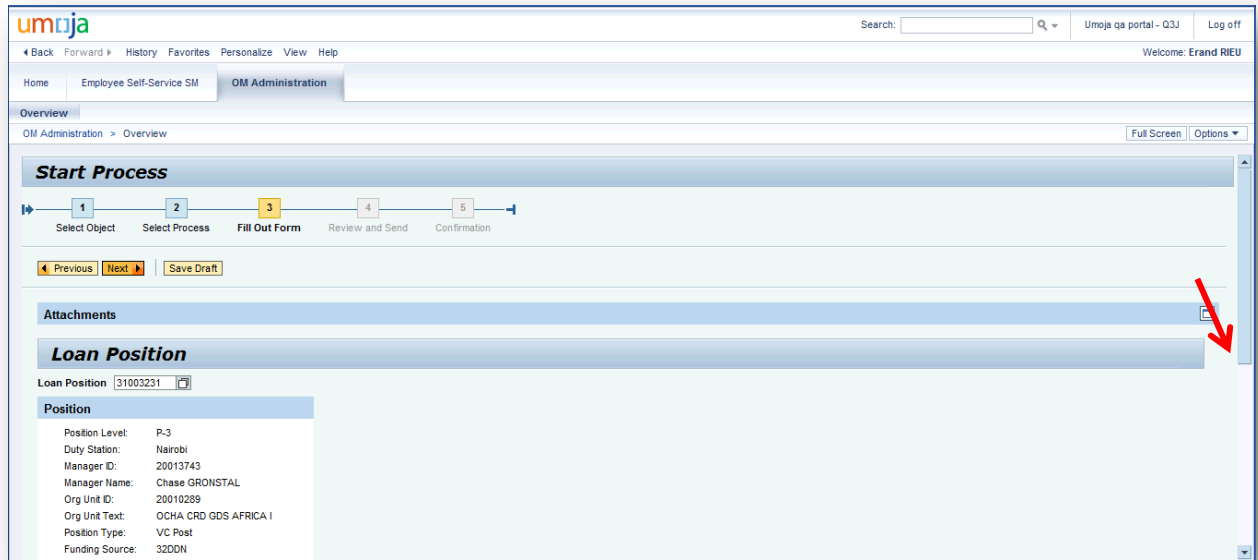
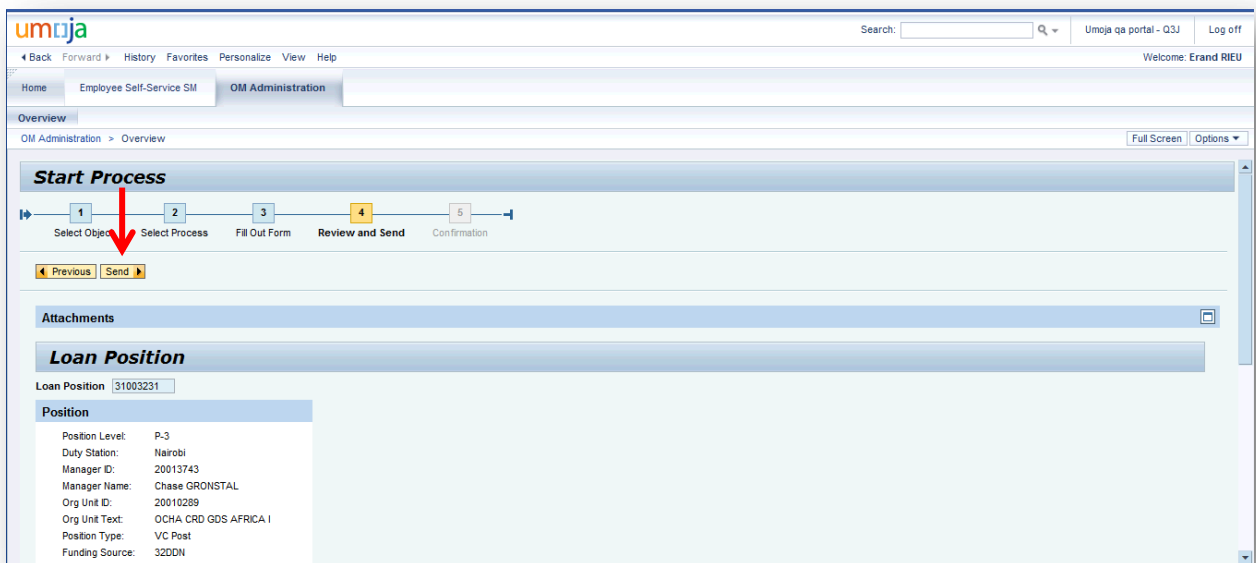27. In the screen above, scroll down to see this part of the screen:
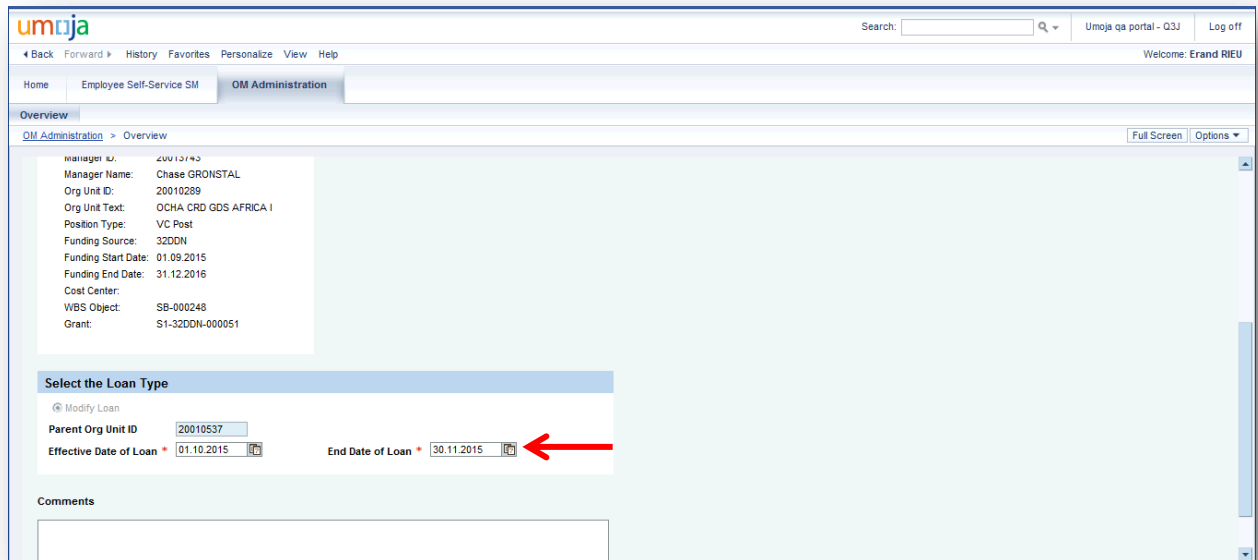
28. In the screen above, enter the end date of the extension of loan then enter the comments as shown in this screen:
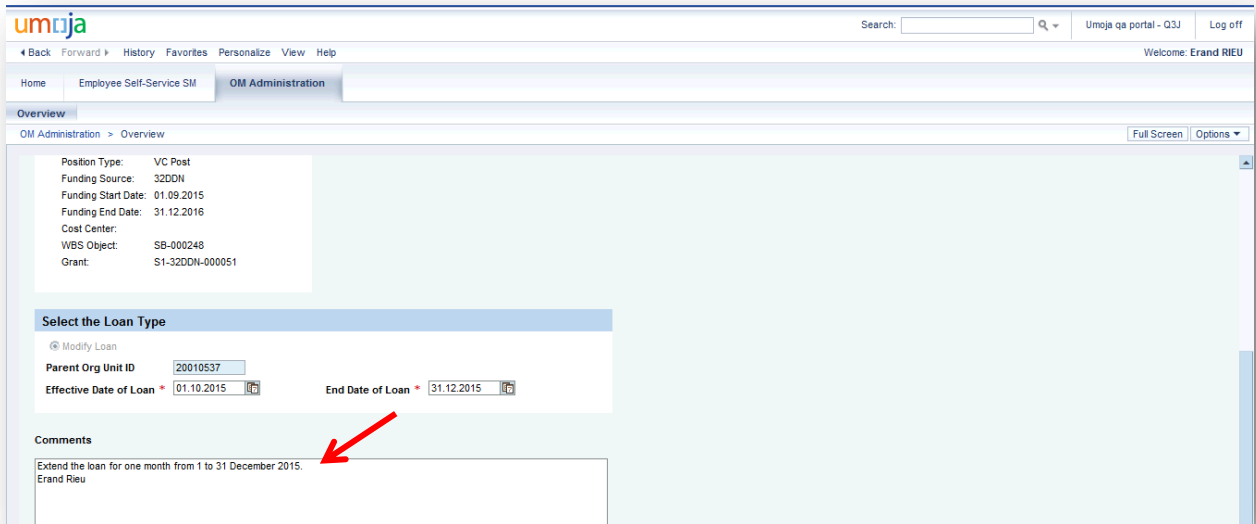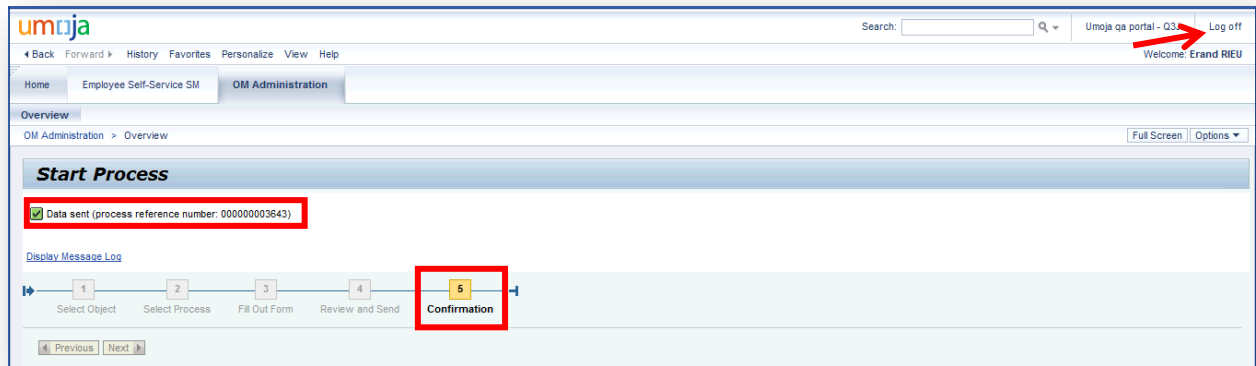
Important: Do not change the effective date of the loan as that date remains the same.

29. In the screen above, scroll up and click on `Next ▶` which opens this screen:

30. Review the end date of the position loan extension and click `Send ▶` which opens this screen:

Note the process reference number 3643. Note further that the process progressed to "5 Confirmation".

31. Log off from the Portal.

32. Repeat Steps 19 to 21 which opens this screen:
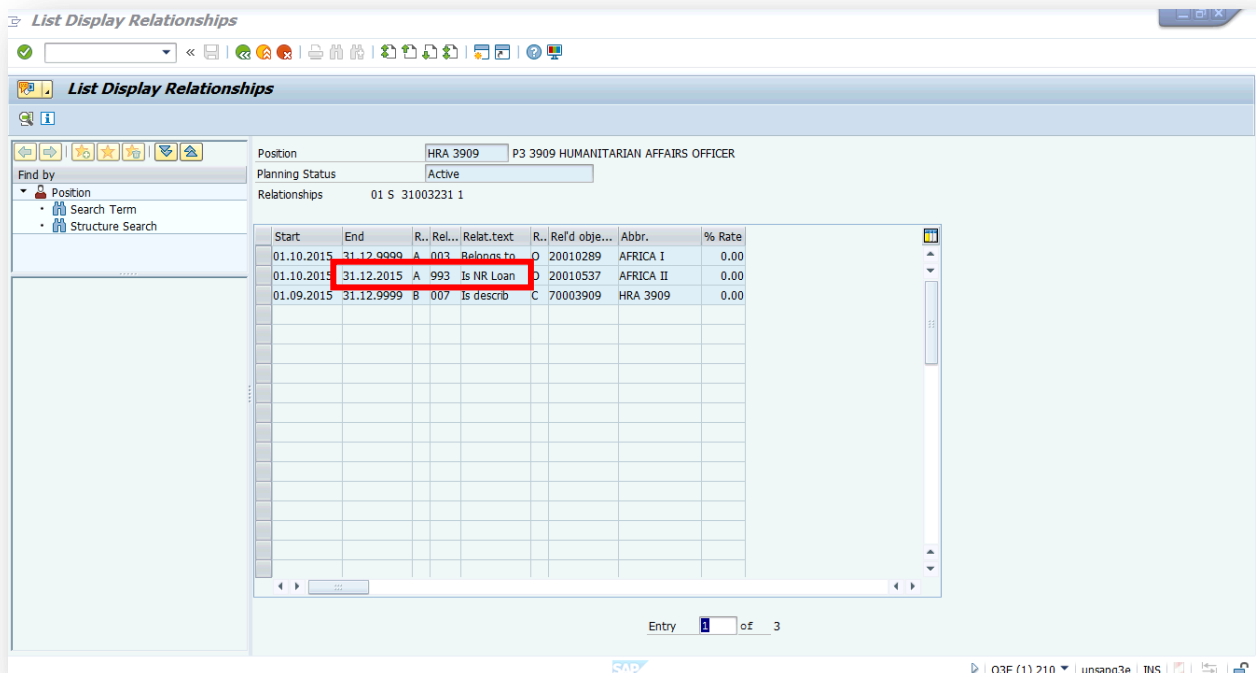
Note that:
The End date of the "Is NR Loan" row shows 31.12.2015, the date to which the loan was extended in the Portal.

Modify loan position – Shorten

33. Repeat Steps 1 to 5. Step 5 opens to this screen:
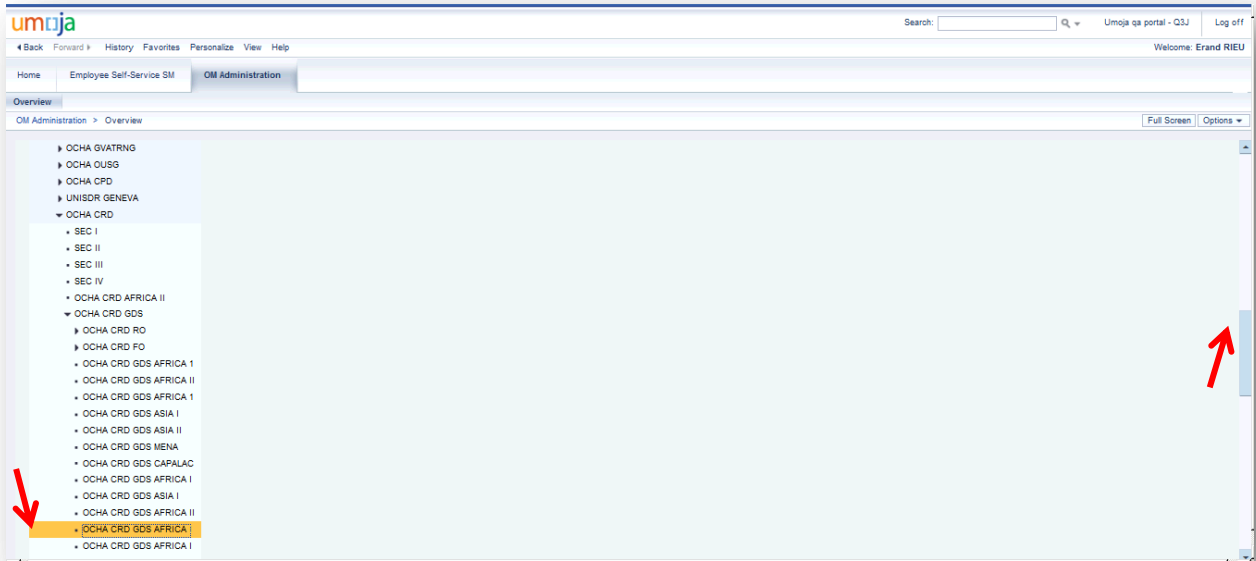
34. In the screen above, select OCHA CRD GDS AFRICA I where the position is loaned and scroll back up to see this screen:
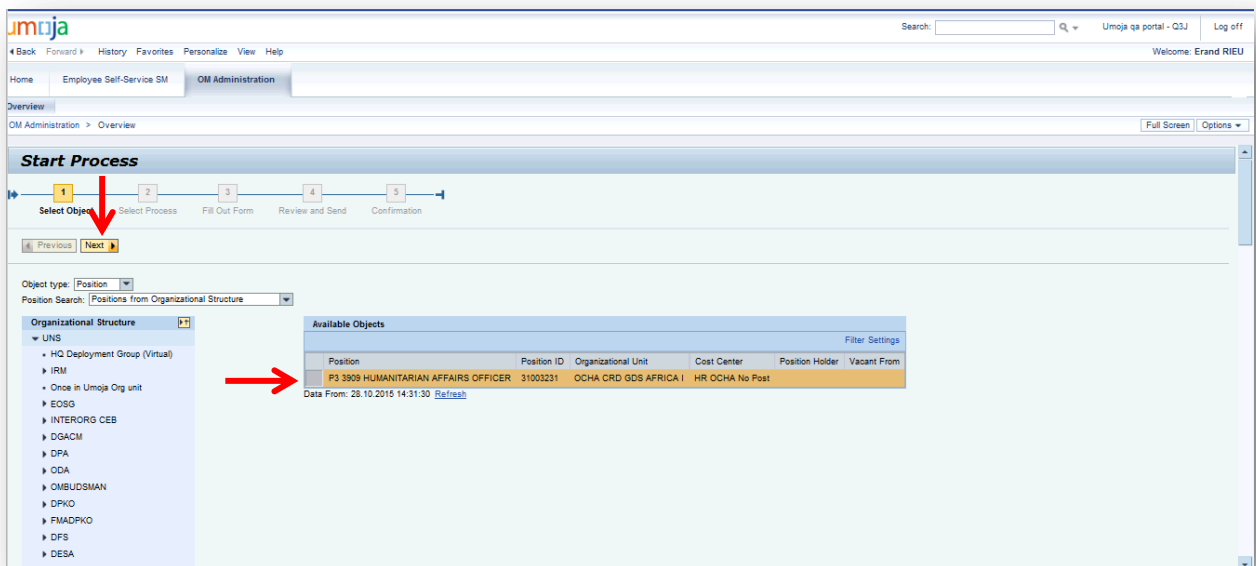
35. In the screen above, select the loaned position 31003231 and click [Next ▶] which opens this screen:
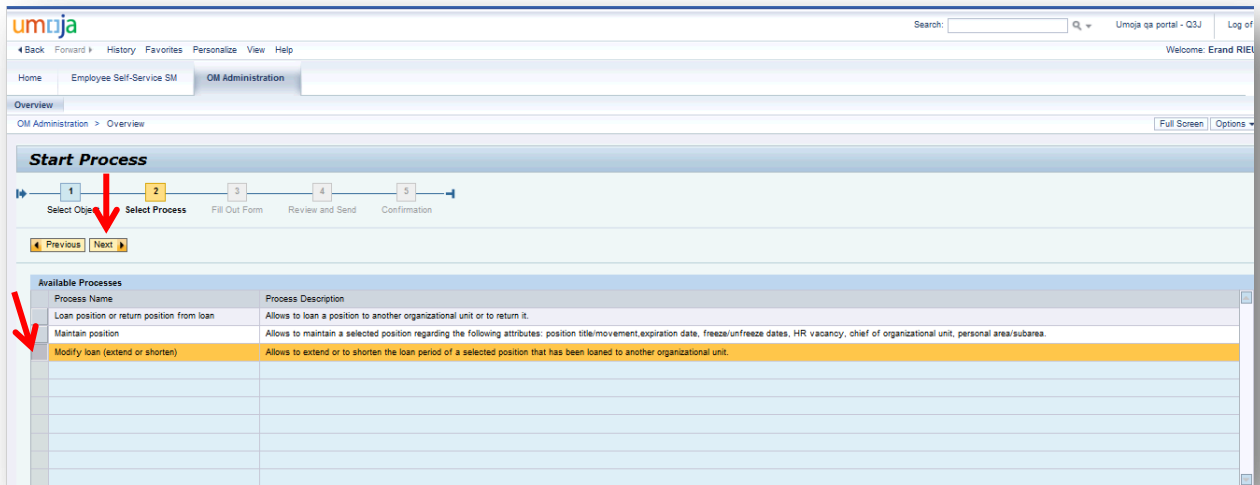
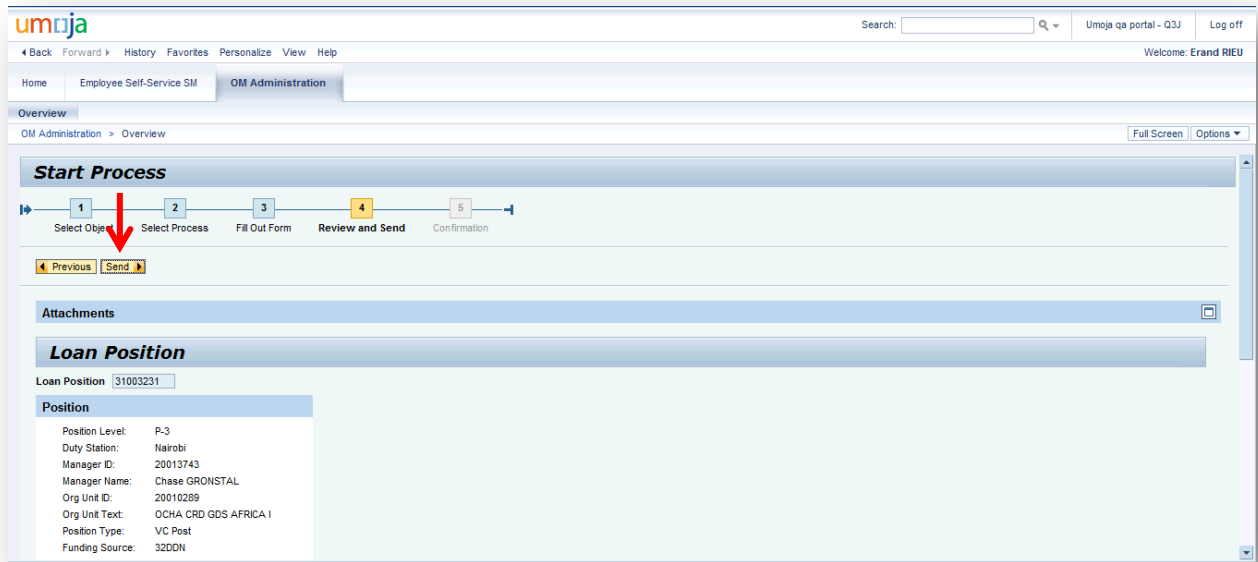36. In the screen above, select Modify loan (extend or **shorten**) and click [Next] which opens this screen:
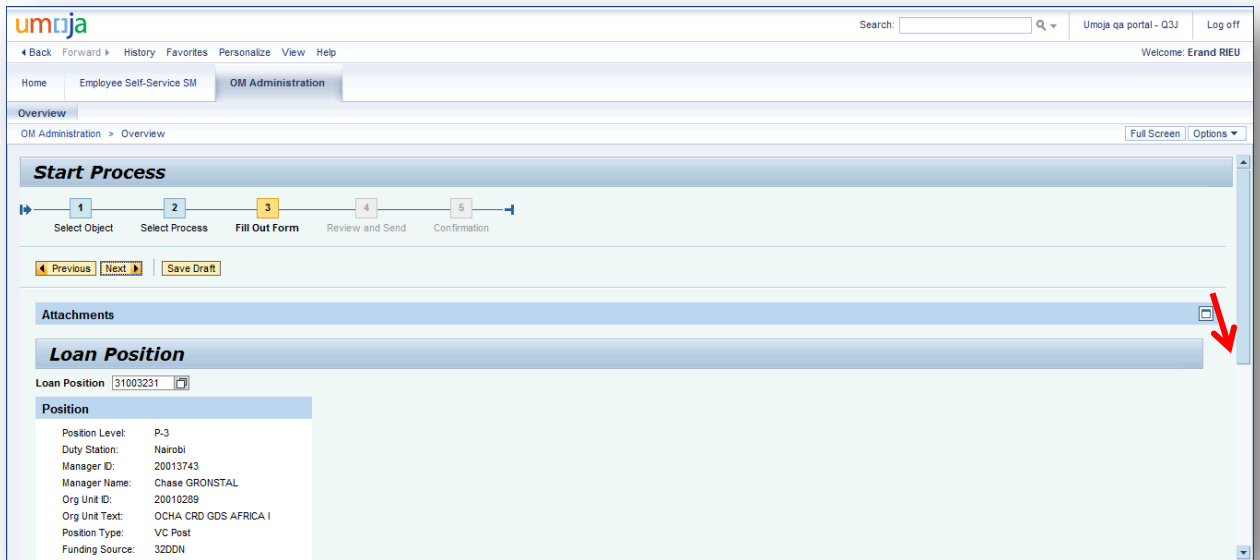
37. In the screen above, scroll down to this part of the screen:
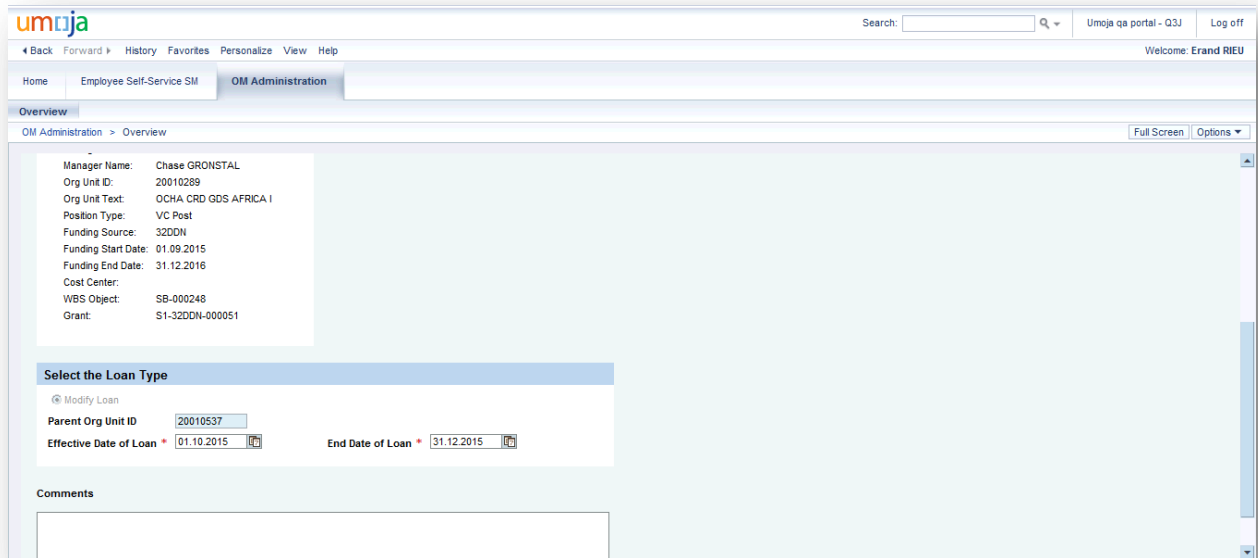
38. In the screen above, change the End Date from 31.12.2015 to 15.12.2015 and enter the Comments as shown in this screen:
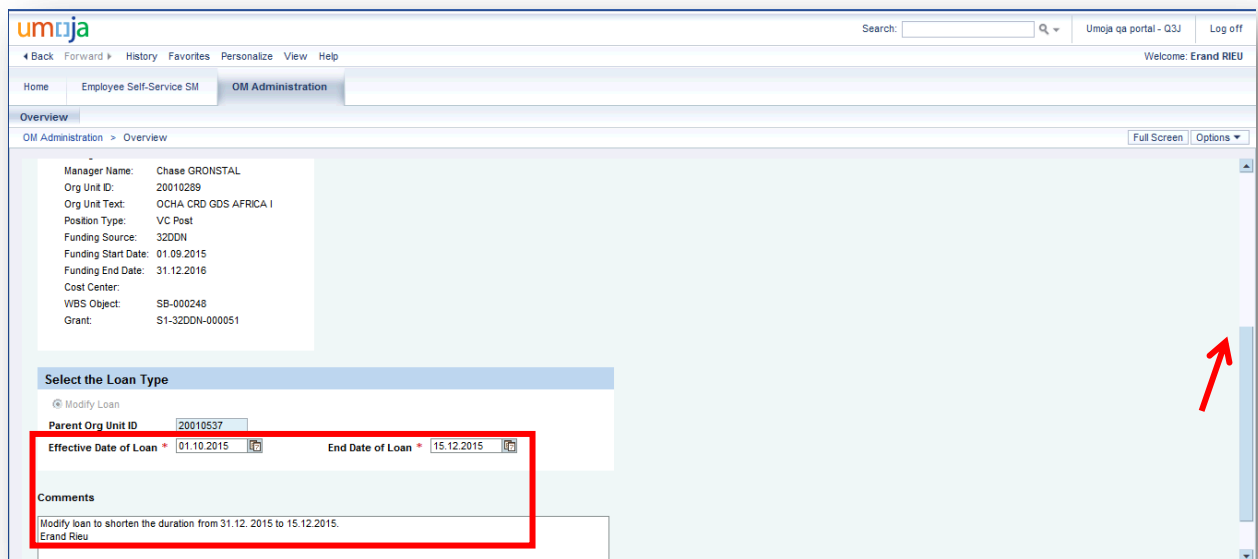
39. In the screen above, scroll back up and click [Next ▶] which opens this screen:

Note that the process progressed to "4 Review and Send".

40. In the screen above, Review the information changed and click [Send] which opens this screen:
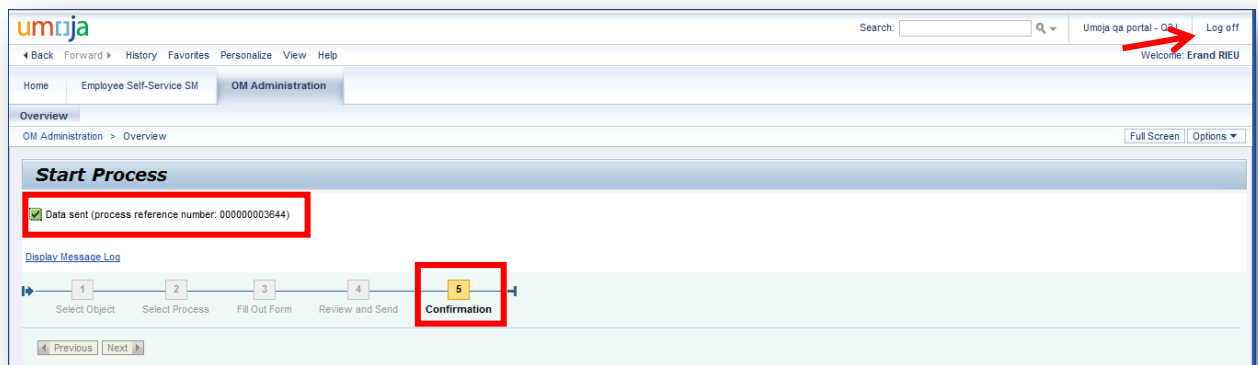
Note the process reference number 3644. Note further that the process progressed to "5 Confirmation".

41. Log off from the Portal.

42. Repeat Steps 19 to 21 which opens this screen:

Note that:
The End date of the "Is NR Loan" row shows 15.12.2015, the date to which the loan was shortened in the Portal.
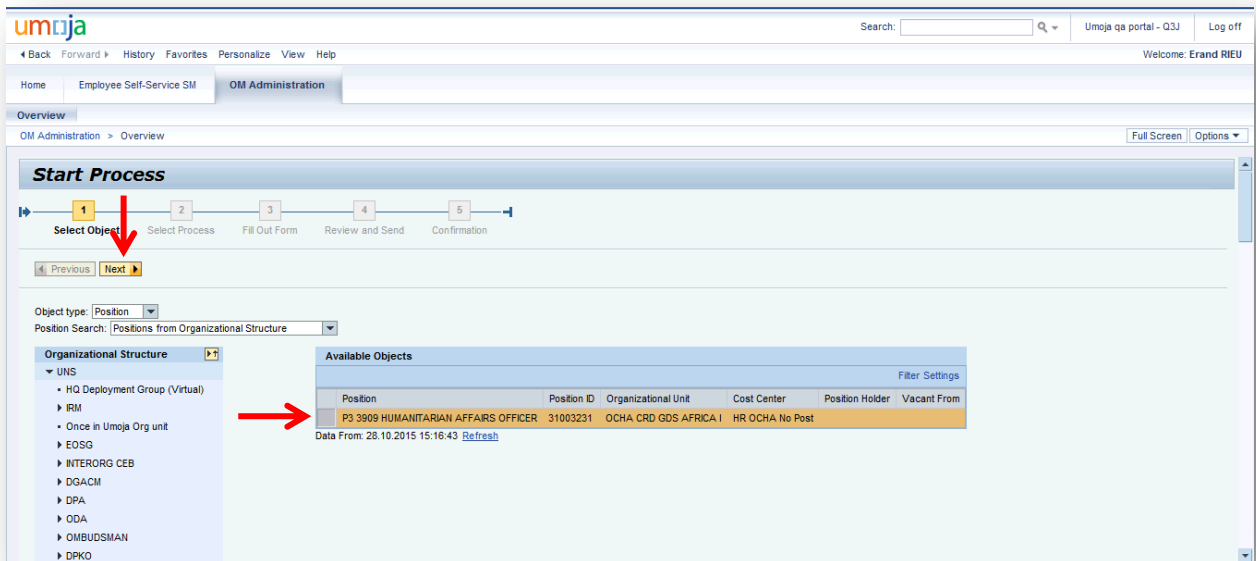
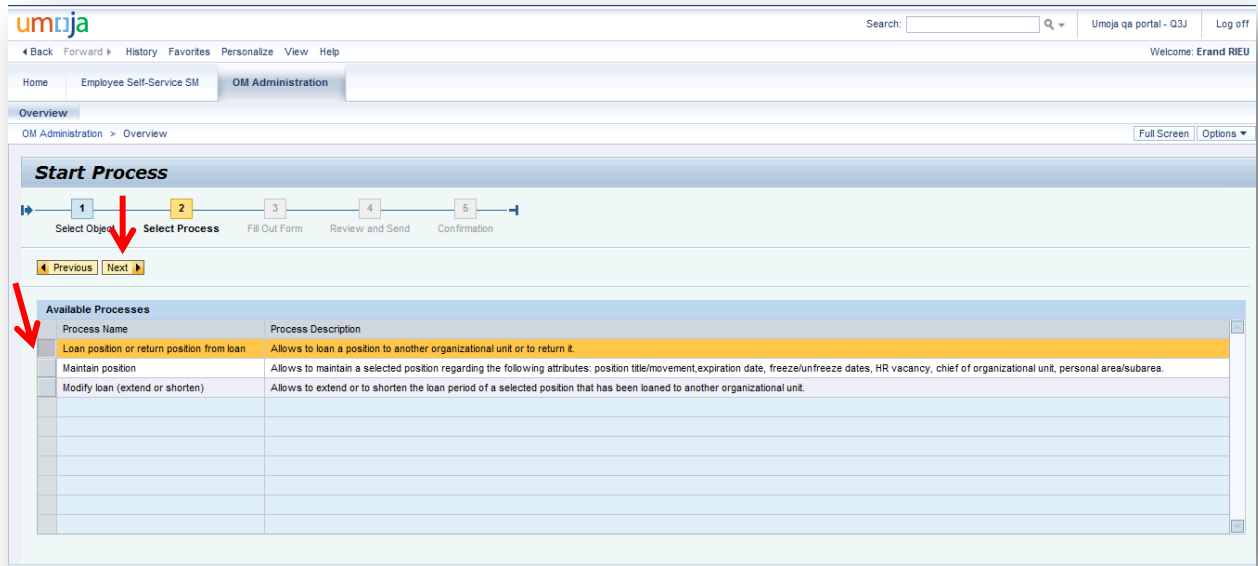43. Log off from ECC.

Return position from loan

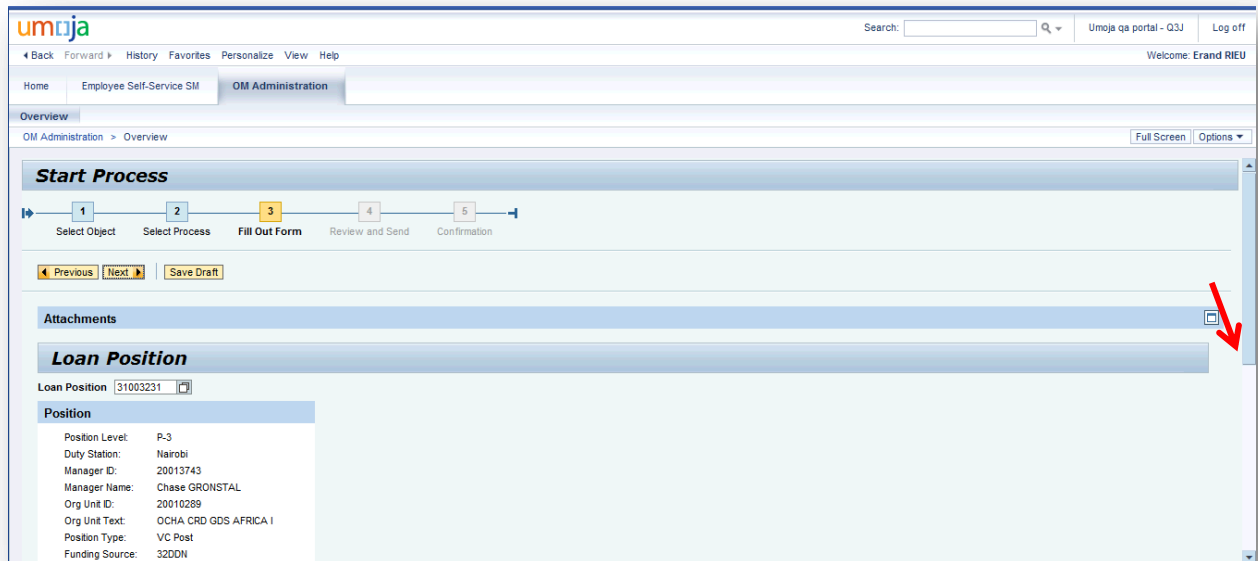44. Repeat Steps 1 to 5. Step 5 opens to this screen:
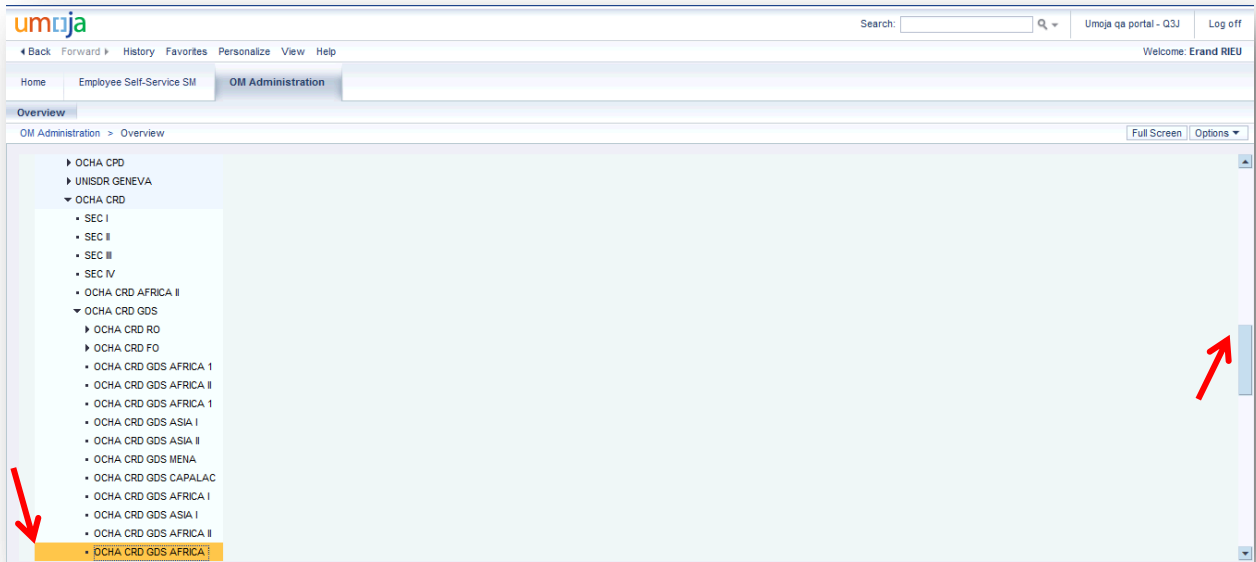
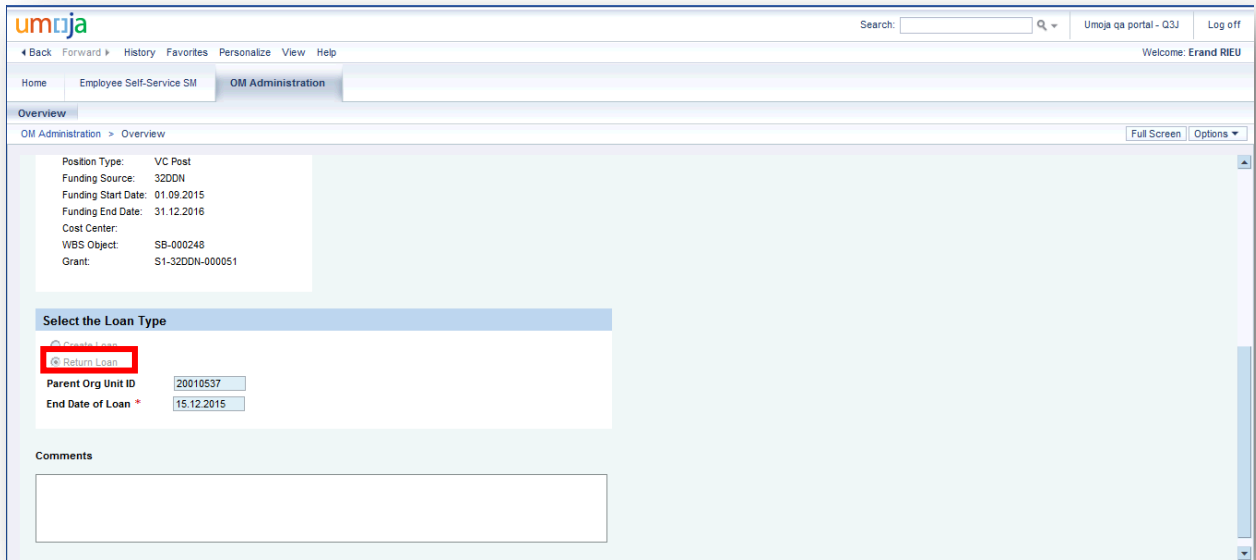45. In the screen above, select OCHA CRD GDS AFRICA I and scroll all the way up which shows this screen:

46. In the screen above, select position 31003231 and click ▶ which opens this screen:

47. In the screen above, select Return position from loan and click [Next] which opens this screen:
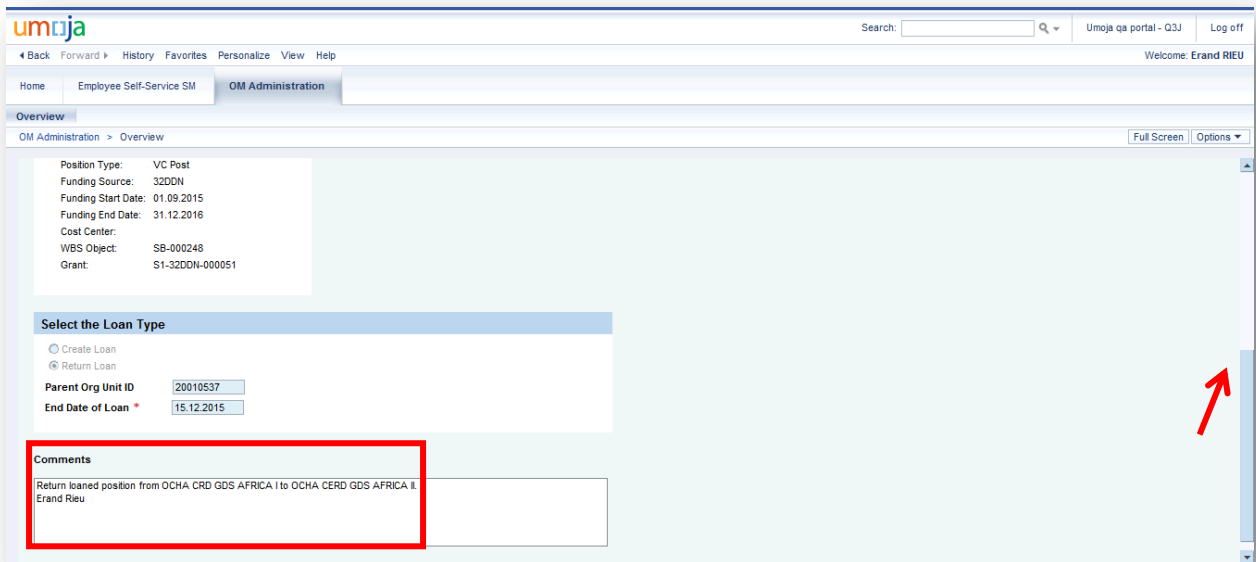

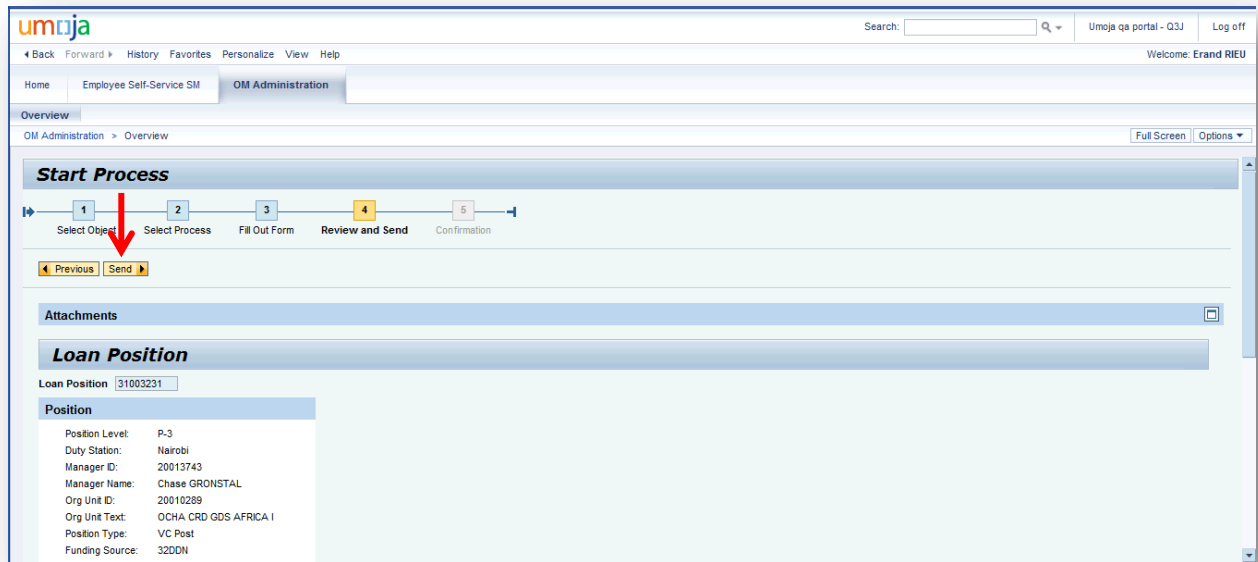48. In the screen above, scroll down to see this part of the screen:

Note that the "Return Loan" is the default action.

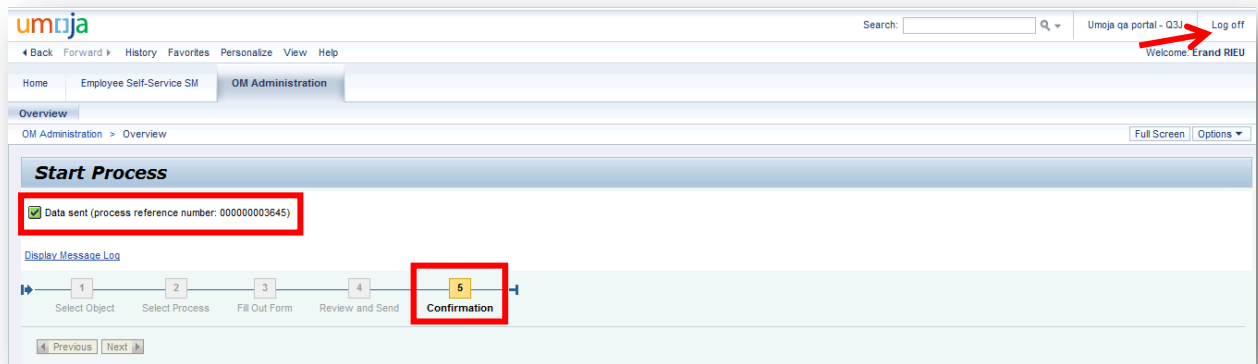49. In the screen above, enter Comments as shown on this screen:

50. In the screen above, scroll back up and click [Next] which opens this screen:

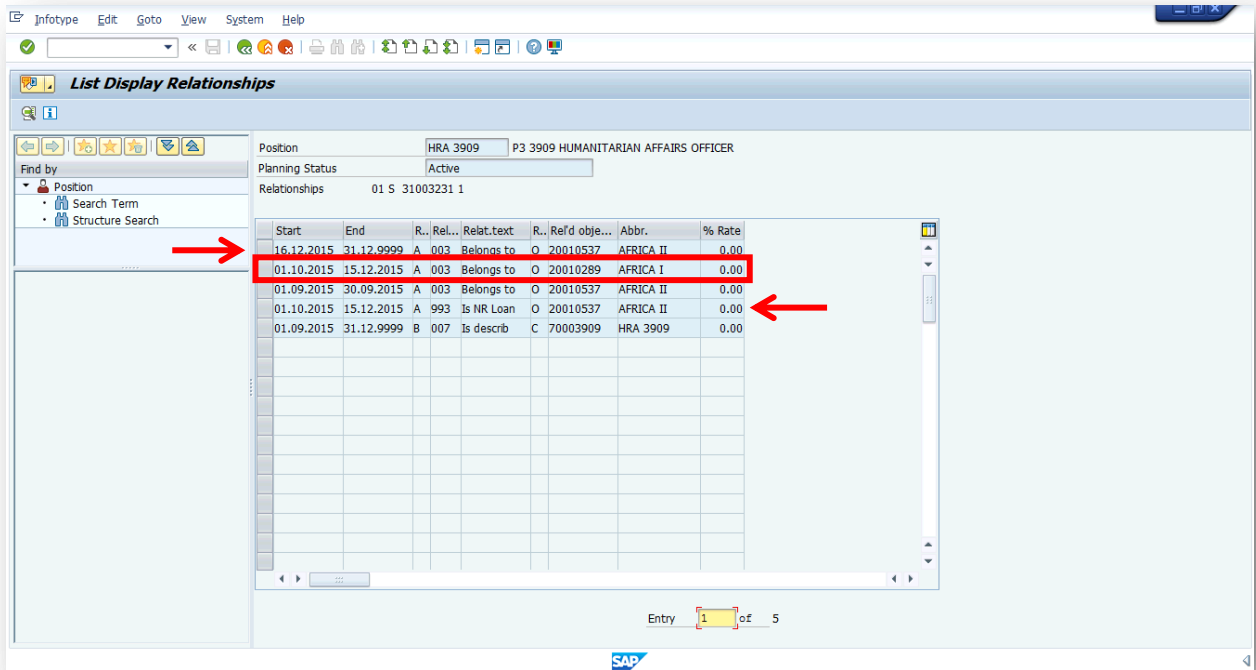**Note that the process progressed to "4 Review and Send".**

51. In the screen above, Review the information entered and click [Send] which opens this screen:

Note the process reference number, 3645.   Note further that the process progressed to "5 Confirmation".

52. Log off from the Portal.

53. Repeat Steps 19 to 21 which opens this screen:

Note that:

In row 1, position 31003231 has been returned to org unit 20010537 OCHA CRD GDS AFRICA II. Note that as described in the italized note in Step 22, each action in between the 5th and 1st rows have end dates that correspond to OM actions taken. Only the most recent action in the 1st row has the End date 31.12.9999.

Row 2 shows that the position was on loan to org unit 20010289 OCHA CRD GDS AFRICA I from 01.10.2015 to 15.12.2015.

Row 4 shows that the position was on loan from org unit 20010537 OCHA CRD GDS AFRICA II for the same duration as shown in Row 2.

This is an example of how OM Administrators should interpret the history of positions which is reflected in ECC.

54. Log off from ECC.