



UMOJA TRAVEL SOLUTION AWARENESS TOWNHALL

FOR MISSIONS, MAY 2018



AGENDA



Topic	Speaker [Suggested]
Umoja Travel Solution – C5 Population	[NAME], [FUNCTIONAL TITLE] D/CMS or Mission Deployment Lead
Project Scope	[NAME], [FUNCTIONAL TITLE] Mission Deployment Coordinator
Mission Timeline & Project Team	[NAME], [FUNCTIONAL TITLE] Mission Deployment Coordinator
User Access Mapping/User Access Provisioning	[NAME], [FUNCTIONAL TITLE] User Access Mapping Focal Point
Unite Identity (EIDMS)	[NAME], [FUNCTIONAL TITLE] Mission Deployment Coordinator
Existing FSS & TRIP Systems	[NAME], [FUNCTIONAL TITLE] Mission Deployment Coordinator
Key Reminders / Travel Request Process Overview	[NAME], [FUNCTIONAL TITLE] Mission Deployment Coordinator
ESS vs. on-behalf for NS & IUP	[NAME], [FUNCTIONAL TITLE] Mission Deployment Coordinator
Communications	[NAME], [FUNCTIONAL TITLE] Mission Deployment Coordinator
Training	[NAME], [FUNCTIONAL TITLE] LPE-T
Support Model	[NAME], [FUNCTIONAL TITLE] LPE-T
Questions and Comments	OPEN FORUM



UMOJA TRAVEL SOLUTION – C5 POPULATION



PURPOSE

- ✓ Deploy the Umoja Travel Solution to remaining DFS (i.e. “C5”) populations who still conduct travel administration within FSS (legacy system)
- ✓ Align DFS with the rest of the UN for complete adoption of Umoja Foundation and Extension 1 (UE1) functionalities



OUTCOME

- ✓ Umoja is the primary platform for all travel activity and budgeting, minimizing off-line processes
- ✓ Increased quality of data to improve the UN’s accountability and efficiency



PROJECT SCOPE



National Staff



IUP-UPs



UNVs



CICs

TRAVEL TYPES: ALL TRAVEL CURRENTLY CONDUCTED IN FSS

ESS TRAVEL MANAGEMENT

- ✓ NATIONAL STAFF
- ✓ IUPs (WMT - within mission travel)

*The ESS portal has been customized with new, simplified screens by user group

ADMINISTER 'ON-BEHALF' TRAVEL

- ✓ UNVs
- ✓ IUP-UPs (OMT - outside mission travel)
- ✓ CICs
- ✓ **ALL NON-STAFF**



PROJECT TIMELINE

FEB 18

1st Deployment kick-off
meeting between
DFS-UCS & mission
Deployment
Coordination Teams

END APR 18

User Access Mapping
Cleanup &
Provisioning Finalized

MAY-JUNE 16

In-mission training
campaign underway

JAN 2018

USG Khare officially
announces deployment
of the Umoja Travel
Solution to remaining PK
& SPMs populations

END-MAR 18

Umoja ESS Portal
configured for IUP-UPs

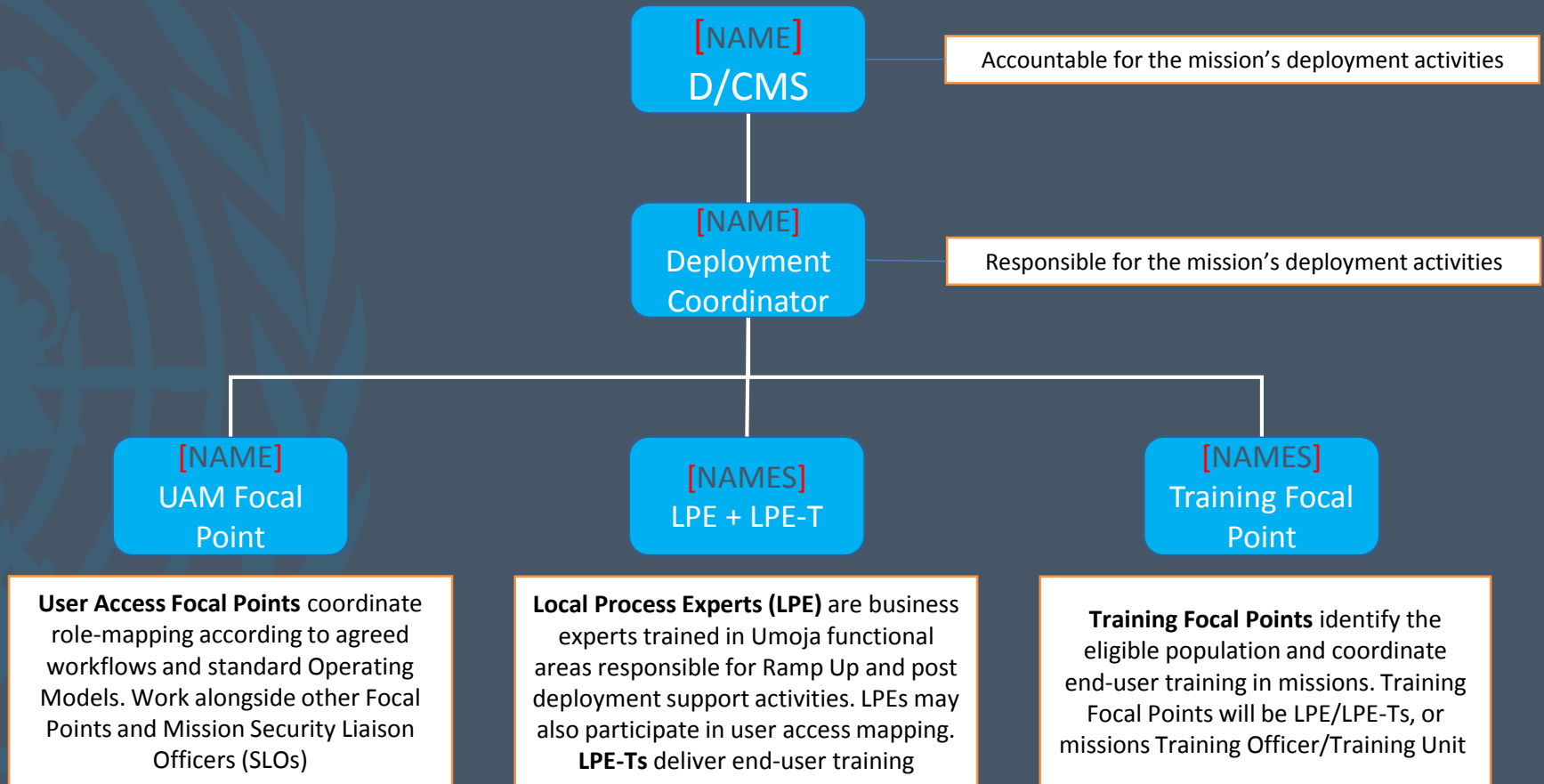
MAY 16

DFS Travel
Management
Integration
Workshops

**15 JUNE
GO-LIVE**



MISSION DEPLOYMENT TEAM



USER ACCESS MAPPING & PROVISIONING

1

An Enterprise Role in Umoja determines what transactions a staff member can perform in the system

2

UAM and UAP enables alignment of job functions with appropriate Umoja Enterprise Role(s)

3

The objective of User Access Mapping (UAM) and User Access Provisioning (UAP) is to ensure business readiness

4

User Access clean-up and provisioning under review by mission focal points; to be approved by C/DMS for the following roles:

- ✓ **Travel Administrators**
- ✓ **TSA**
- ✓ **TPO commercial**
- ✓ **TPO non-commercial**
- ✓ **IUP with new ESS role**

5

UAM/UAP Strategy:

- ✓ Dedicated UAM focal points in missions and UNHQ Project Team
- ✓ Support from UNHQ Project Team for initial mapping
- ✓ New Roles to DFS: TPO non-commercial (TV20), Travel Reporting (BI.35), and CR.03 ESS-IUP
- ✓ If UAP changes are needed after 15 June, follow the standard SLO role mapping procedure



WHAT IS A UNITE (EIDMS) ID?

A Unite ID is a unique ID that grants employees access to Umoja's [Employee Self-Service](#) portal. Receiving/activating your Unite ID is the first step to accessing Umoja

The image shows the login page for the Umoja Self-Service portal. It features the United Nations logo on the left and the 'umoja self-service' logo in the center. On the right, there is a login form with the title 'Login to Umoja Self-Service', a field for 'Unite ID:', a 'CONTINUE' button, and links for 'Where do I enter my password?', 'Forgot your Unite ID?', and 'Forgot your password?'.

You can initiate self-service tasks and upload supporting documentation in ESS. Information is automatically routed to HR or other relevant administrative personnel for review and approval

You will need this every time you login to Umoja



National staff already use ESS and will not need a new Unite ID



Only IUPs will receive new Unite ID credentials



IUPs will receive an email (from by DFS-UCS) containing information about new Unite ID details and how to activate accounts closer to 15 June



Click [here](#) for instructions on how to log-in to Umoja Employee Self-Service



WHAT HAPPENS TO FSS & TRIP SYSTEMS?



FSS CHANGES AS OF 15 JUNE



PT8 – RAISING TRAVEL REQUESTS

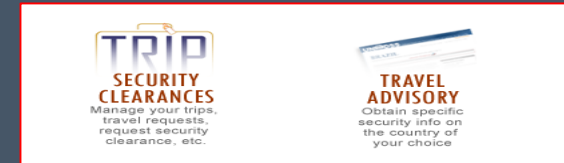


***F10 – PROCESSING TRAVEL CLAIMS**



MOP – MOVEMENT OF PERSONNEL

- ✓ Security clearance for WMT can be triggered from Umoja and FSS until further notice
- ✓ Employees conducting WMT via UN assets must enter travel requests in Umoja AND complete an MOP form in FSS



TRIP AS OF 15 JUNE



CURRENT TRIP PROCESSES WILL REMAIN UNTIL FURTHER NOTICE



DFS-UCS IS WORKING WITH DSS TO IMPROVE THE UMOJA/TRIP INTERFACE

**Non-travel related claims will remain in FSS*



KEY REMINDERS



IUP/UNV/CIC Travel Process

[Decide how non-staff should contact TAs to initiate the on-behalf process].
Email? Phone Call?



Mini Master

Non-staff require a mini master to travel. Contact your HR Partner/admin if a new mini master is needed



Cyclical Training

All rotating IUPs should be updated on Travel processes during their on-boarding period



Transactional Users

Potential increase in workload due to on-behalf activities



TRAVEL REQUEST PROCESS OVERVIEW



Raise Travel Request
NS & IUPs (ESS) and
Travel Administrators (TV.05)



Certify Travel Request
Travel Shipment Approver (TV.07)



Approve Travel Request
Travel Processing Officer (TV.20/10)



Create Expense Report
NS & IUPs (ESS) and
Travel Admins (TV.05)



Certify Expense Report
Travel Shipment Approver (TV.07)



Approve Expense Report
Travel Claims Processor (TV.11)

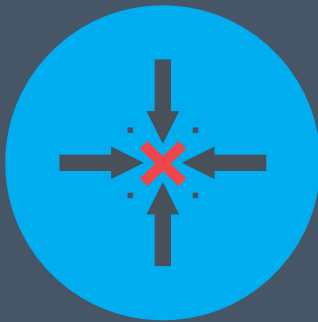


ESS National Staff



AS IS

- Travel Requests submitted in FSS



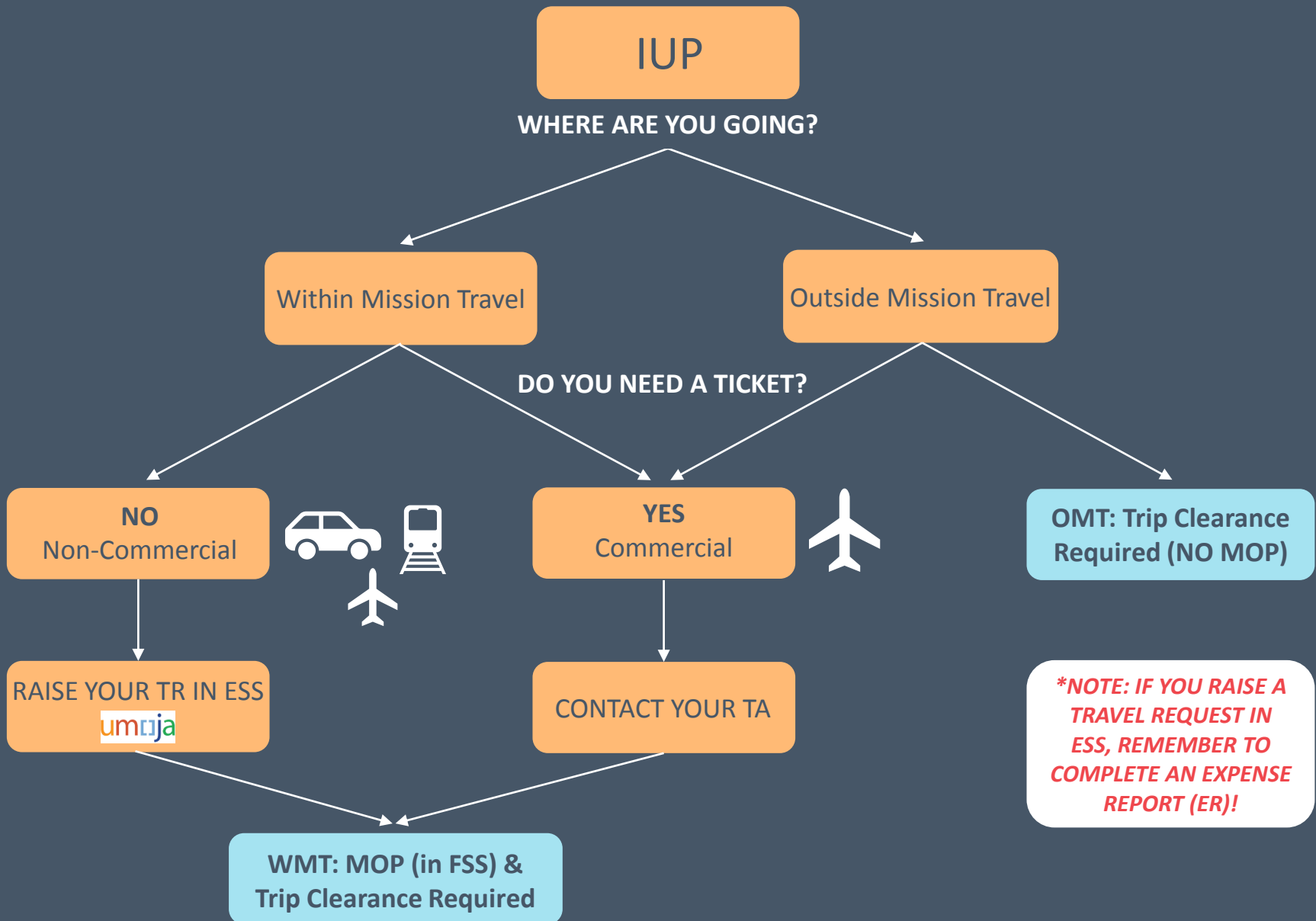
TO BE

- ✓ All Travel Requests will be entered in Umoja
- ✓ Personally raise all Travel Requests with Employee Self-Service (ESS)
- ✓ Travel related Expense Reports completed in Umoja



ESS VS. ON-BEHALF

Individual Uniform Personnel



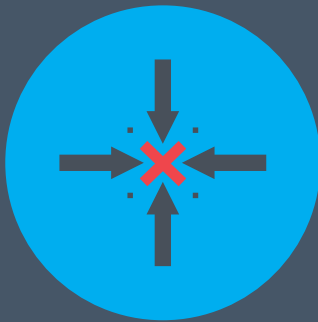
ESS VS. ON-BEHALF

UNV, CIC, UP, Non-Staff



AS IS

- Travel Requests submitted in FSS



TO BE

- ✓ All Travel Requests will be entered in Umoja
- ✓ All Travel Requests will be raised on-behalf by Travel Administrators



COMMUNICATION CHANNELS



- ✓ **Public Umoja Travel website: <https://umoja.un.org/dfs>**
 - FAQs (<https://umoja.un.org/faq>)
 - Travel Job Aids (<https://umoja.un.org/content/job-aids>)
 - Training YouTube Videos: (<https://www.youtube.com/channel/UCtDLcM3cTMqZzQYd67LAd8A>)
- ✓ **Information portals at [MISSION]:**
 - [Intranet]
 - [Other methods, i.e. newsletters, bulletin boards, radio stations]
- ✓ **Town halls**
- ✓ **Resources**
 - Cheat Sheets
 - Process Diagrams & Road Maps
 - Demonstration Kiosks
- ✓ **Assessment Survey**
 - Post go-live



TRAINING RESOURCES



LPE-Ts & ESS Focal Points

- ✓ Staff / Non-Staff employees: Travel professionals, or staff supporting employee groups who do not have access to ESS
- ✓ Transactional users

Local Process Expert-Trainers/Travel Integrated Training Attendees: will deliver teach-back sessions

[MISSION] LPE-T's are:

Name
Name
Name

ESS Focal Points:
First line of support for end-user questions

[MISSION] Focal Points are:

Name
Name
Name

*****ESS Focal Points must prioritize Travel related inquiries during ramp-up and post-go-live hyper-care periods*****



KNOWLEDGE SHARING APPROACH



WHERE CAN I GET HELP?

IUPs/NATIONAL STAFF/FOCAL POINTS

- ✓ Go to your LPE-Ts and knowledgeable colleagues
Distance Learning
- ✓ Video Tutorials: Travel Requests & Expense Reports
- ✓ Training Environment: Practice Transactions
- ✓ Training Assessments: Test your knowledge before raising requests in Umoja

TRANSACTIONAL USERS (TAs, TSA, TSP, TPO, TCP)

Face to Face training delivered by LPE-Ts

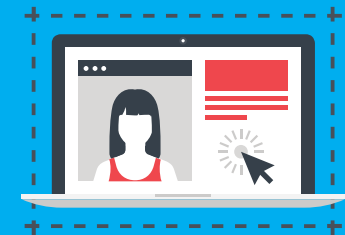


Take online assessment to receive Inspira certificate

UNVs, CICs, UPs

No training required
(No activity in Umoja ESS, only on-behalf process)

BI.35 Training



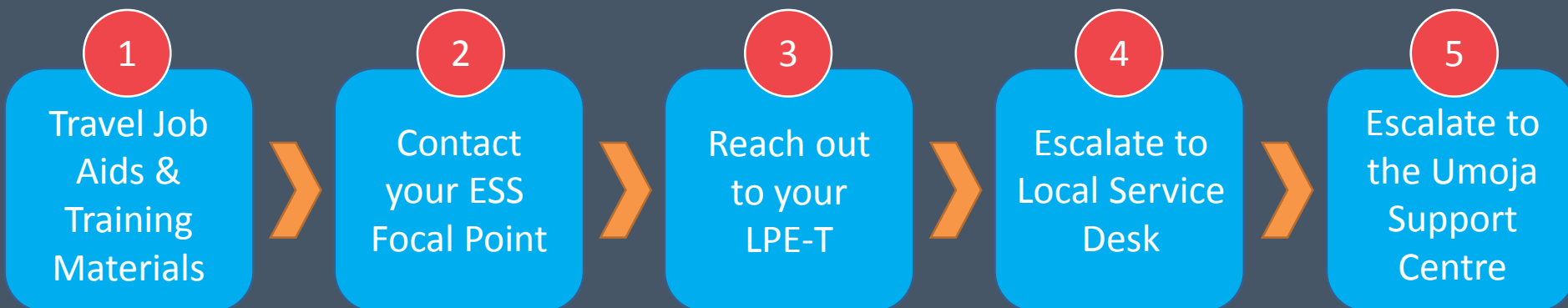
WebEx sessions on reporting will be conducted post-deployment; dates to be confirmed



ESS SUPPORT MODEL



NEED HELP?



VIEW THE OFFICIAL DFS PRODUCTION SUPPORT MODEL [HERE](#)



QUESTIONS



Ask your Deployment Team
Or email: dfs-ucs@un.org





Annex



IUP-UP GLOSSARY



1. **ESS ([Employee Self Service](#))**
 - A Umoja portal that provides a central resource for HR, Financial, and Travel related tasks. It enables UN employees to update data and information; submit requests/applications for entitlements, time management, and travel; and access information and guidance on HR policy and procedures.
2. **UNITE ID (EIDMS)**
 - EIDMS is a unique ID that grants employees access to Umoja. Receiving your EIDMS credentials and activating them to log into the Umoja Dashboard is the first step to accessing Umoja Production Systems.
3. **TA (Travel Administrator)**
 - UN staff members who submit Travel Requests in Umoja.
4. **Stand alone Expense Report**
 - A document that justifies reimbursement for employee expenses when 1) no Travel Request was raised prior to departure, 2) personal funds are used to cover any official expenses during travel.
5. **'On-Behalf'**
 - Travel Administrators who raise Travel Requests in Umoja for other employees.
6. **Within Mission Travel (WMT) – non commercial:**
 - Travel on UN transportation that does not require purchase of a commercial ticket. The Travel Request can be submitted yourself through ESS.
7. **Within Mission Travel – commercial:**
 - Travel between two locations within the same mission, but still requires purchase of a commercial ticket. Therefore, the Travel Request must be submitted in Umoja by a Travel Administrator.
8. **Outside Mission Travel (OMT)**
 - Travel that requires purchase of a commercial ticket, and the Travel Request must be submitted in Umoja by a Travel Administrator.



UPDATED OPERATION MODEL



In Mission											
In Service Center		HR	TRAVEL REQUEST			FINANCE	EXPENSE REPORT		SHIPMENT REQUEST		
		Raising PA	Raising	Certiying	Approving	Invoice Processing	Raising	Approving	Raising	Approving	
OB Within Mission Travel											
<i>National Staff</i>		PA.02	Self	TV.07	TV.20		Self	TV.11			
<i>IUPs</i>		PA.02	Self	TV.07	TV.20		Self	TV.11			
<i>UNVs</i>		PA.28	TV.04	TV.07	TV.20		TV.04	TV.11			
<i>All other non-staff (CICs, UPs, etc.)</i>		PA.28	TV.06	TV.07	TV.20		TV.06	TV.11			
OB Outside Mission area											
<i>National Staff</i>		PA.02	Self	TV.07	TV.10	TV.12	Self	TV.11			
<i>IUPs</i>		PA.02	TV.05	TV.07	TV.10	TV.12	TV.05	TV.11			
<i>UNVs</i>		PA.28	TV.04	TV.07	TV.10	TV.12	TV.04	TV.11			
<i>All Other non-staff (CICs, UPs, etc.)</i>		PA.28	TV.06	TV.07	TV.10	TV.12	TV.06	TV.11			
Emplacement/Repatriation											
<i>IUPs</i>		TBD	TV.05	TV.07	TV.10	TV.12	TV.05	TV.11	TV.05	TV.08	



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