UMOJA TRAVEL SOLUTION AWARENESS TOWNHALL

FOR MISSIONS, MAY 2018
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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
Launch Date
15 June

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
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

**D/CMS**
Accountable for the mission’s deployment activities

**Deployment Coordinator**
Responsible for the mission’s deployment activities

**UAM Focal Point**

**LPE + LPE-T**

**Training Focal Point**

User Access Focal Points coordinate role-mapping according to agreed workflows and standard Operating Models. Work alongside other Focal Points and Mission Security Liaison Officers (SLOs).

Local Process Experts (LPE) are business experts trained in Umoja functional areas responsible for Ramp Up and post deployment support activities. LPEs may also participate in user access mapping. **LPE-Ts** deliver end-user training.

Training Focal Points identify the eligible population and coordinate end-user training in missions. Training Focal Points will be LPE/LPE-Ts, or missions Training Officer/Training Unit.
An Enterprise Role in Umoja determines what transactions a staff member can perform in the system.

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

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

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

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.

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 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*
**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

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

2. Certify Travel Request
   Travel Shipment Approver (TV.07)

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

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

5. Certify Expense Report
   Travel Shipment Approver (TV.07)

6. 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

**IUP**

WHERE ARE YOU GOING?

**Within Mission Travel**

DO YOU NEED A TICKET?

**NO**
Non-Commercial

RAISE YOUR TR IN ESS

**YES**
Commercial

CONTACT YOUR TA

**Outside Mission Travel**

OMT: Trip Clearance Required (NO MOP)

WMT: MOP (in FSS) & Trip Clearance Required

*NOTE: IF YOU RAISE A TRAVEL REQUEST IN ESS, REMEMBER TO COMPLETE AN EXPENSE REPORT (ER)!*
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/UCtDLcM3cTMqZqQYd76Ad8A)

✓ 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
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
NEED HELP?

VIEW THE OFFICIAL DFS PRODUCTION SUPPORT MODEL HERE
QUESTIONS

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

<table>
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<tr>
<th>HR</th>
<th>TRAVEL REQUEST</th>
<th>FINANCE</th>
<th>EXPENSE REPORT</th>
<th>SHIPMENT REQUEST</th>
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<tr>
<td>Raising PA</td>
<td>Raising</td>
<td>Certifying</td>
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<td>Raising</td>
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#### OB Within Mission Travel

##### National Staff

- **PA.02**
  - TV.07
  - TV.20
  - Self
  - TV.11

- **IUPs**
  - **PA.02**
  - TV.07
  - TV.20
  - Self
  - TV.11

- **UNVs**
  - **PA.28**
  - TV.04
  - TV.20
  - TV.06
  - TV.11

- **All other non-staff (CICs, UPs, etc.)**
  - **PA.28**
  - TV.06
  - TV.20
  - TV.06
  - TV.11

#### OB Outside Mission area

##### National Staff

- **PA.02**
  - TV.07
  - TV.10
  - TV.12
  - Self
  - TV.11

- **IUPs**
  - **PA.02**
  - TV.07
  - TV.10
  - TV.12
  - TV.05
  - TV.11

- **UNVs**
  - **PA.28**
  - TV.04
  - TV.10
  - TV.12
  - TV.04
  - TV.11

- **All Other non-staff (CICs, UPs, etc.)**
  - **PA.28**
  - TV.06
  - TV.10
  - TV.12
  - TV.06
  - TV.11

#### Emplacement/Repatriation

##### IUPs

- **TBD**
  - TV.05
  - TV.10
  - TV.12
  - TV.05
  - TV.08
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