ECC Reports for HR Partners

Document History

Revision Date	Summary of Changes
25/05/2016	Initial Release
13.11.2017	**Added**: 1. Links to Reports Training materials 2. Run Report in Background 3. Time Monitoring Reports chapter **Updated** 1. Position Report

HR Partner All

1 Reports Training

New Content The videos below provide explanations of concepts key to understanding and making use of your Display Role access in Umoja to run reports.

Introduction

Topic	Description	
HR Display Role Overview	What can users with HR Display Role access view in Umoja?	4 mins 18 secs
Logging In to Umoja	How to log in to Umoja through the Citrix client.	1 min 10 secs
Using T-Codes	How to use T-Codes to access Infotypes and Infogroups, including basic navigation	4 mins 51 secs

View Information Using Reports

Topic	Description	
Running Reports	How to run reports and export to Excel.	3 mins 21 secs
Creating a Report Variant	How to create a customized version of a report for reuse.	0 mins 47 secs
Using Execute in Background	How to run reports in background to prevent time out errors.	1 min 27 secs

2 About Reports

Umoja provides a number of pre-defined reports which can easily be run by users with appropriate access.

This job aid covers the procedures to run some of the Human Resources and Organizational Management reports most frequently used by HR Partners.

2.1 Running Reports

You run reports either by entering the report's T-Code in the Command text box, or by navigating the menu tree and selecting the appropriate report.

Each report has its own set of parameters which are defined at the time of running the report. The parameters allow you to limit the scope of the report so a focused result list is returned.

Parameter settings for a report can be saved for repeated use in the future, saving you the time of resetting the parameters each time you use the report. The version of the report saved with parameter settings is called a report variant.

The variant saves only the parameter settings. Each time you run the variant, the current records matching those values will be returned as an unique results list.

2.1.1 Creating a Report Variant

Use this procedure to create and save a report variant which you can use for repeated execution of the report in the future.

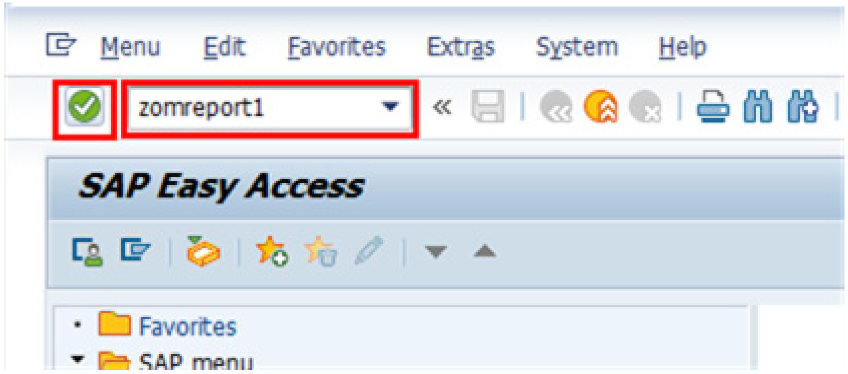
Scenario

A report variant will be set up to run a Budgetary Vacancy report for DPKO.

Procedure

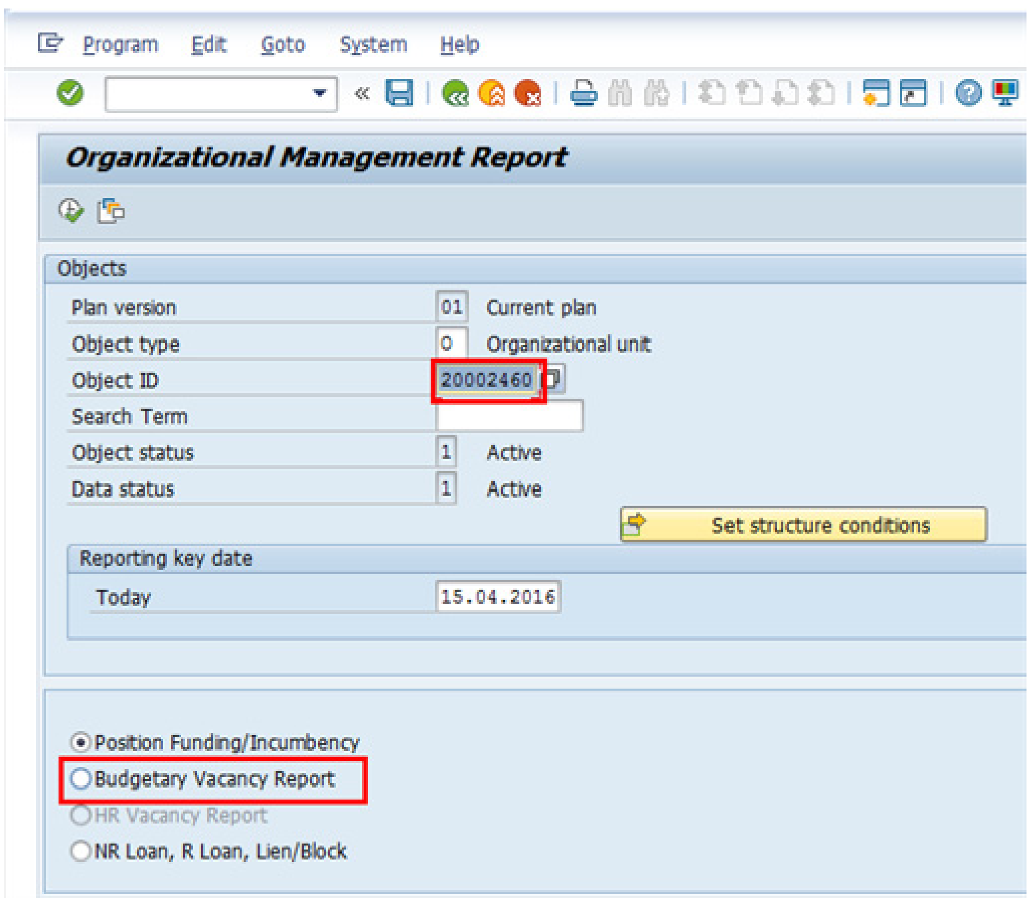
1. To create a report variant, access the report using the menu path or transaction code.

SAP Easy Access



2. Click after typing the report T-Code in the Command text box. [Scenario: zomreport1]

Organizational Management Report

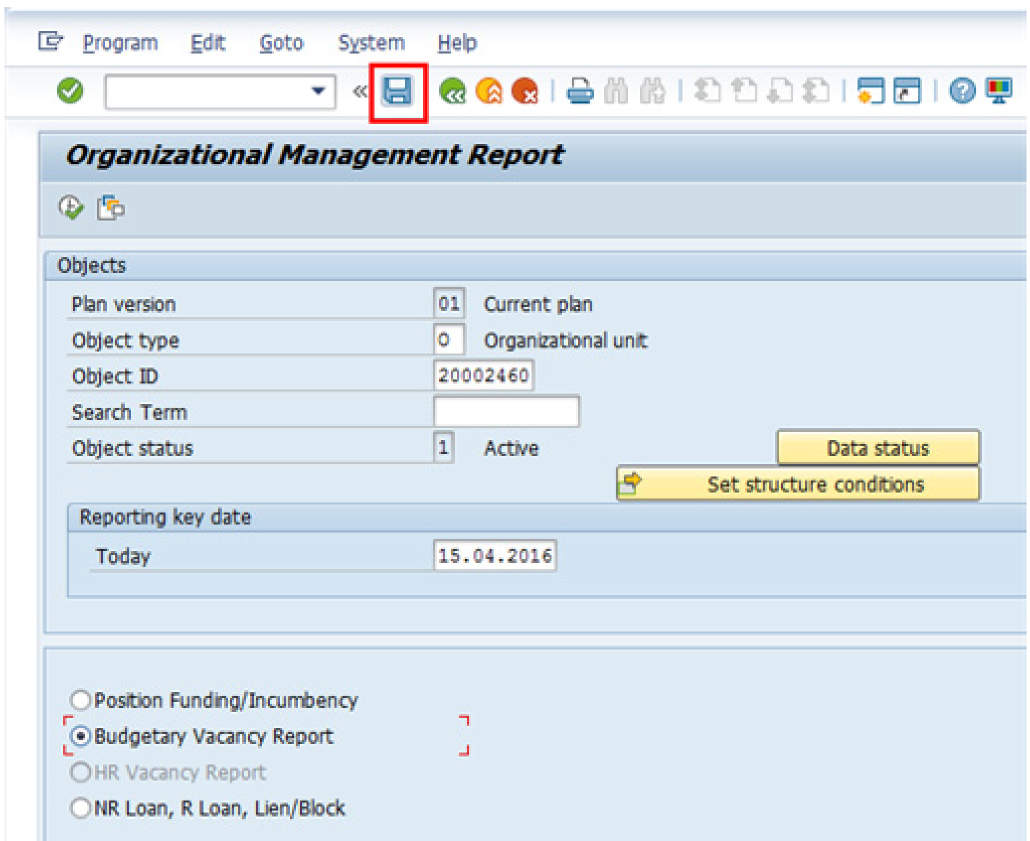


3. Enter or select values for the report parameters that you want to save as defaults for this variant of the report.

In this scenario, the variant will be set up to run a Budgetary Vacancy Report for DPKO.

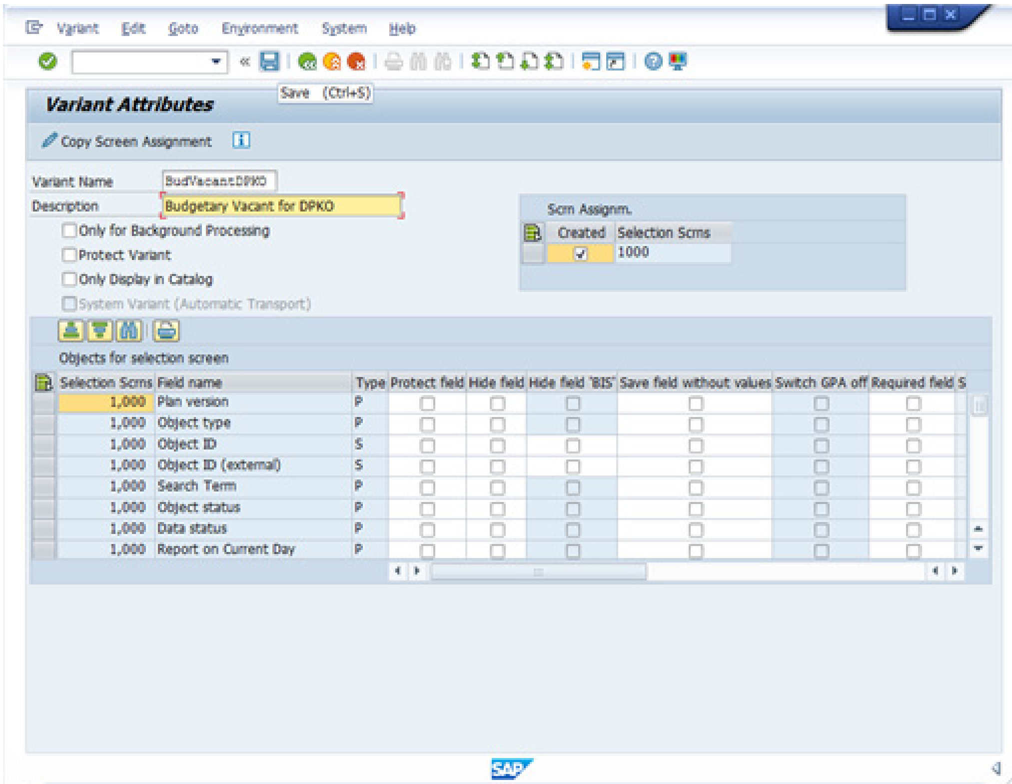
- Select or enter the org unit in the Object ID text box. [Scenario 20002460 for DPKO]
- Click Budgetary Vacancy Report to select the Budetary Vacancy Report option.

Organizational Management Report



4. Click to save the variant.

Variant Attributes



5. To complete the process of creating a variant, you must provide a name and description. Use meaningful names and descriptions to help you remember the purpose of each variant.

- Enter a name in the Variant Name text box. [Scenario: BudVacantDPKO]
- Enter a description in the Description Text box. [Scenario: Budetary Vacant for DPKO]

Click to save.

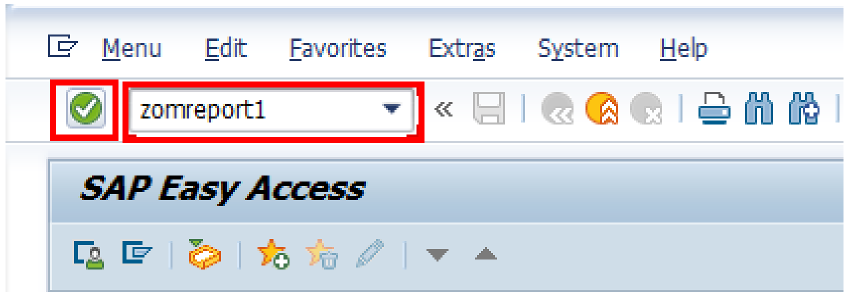
2.1.2 Running a Report Variant

Use this procedure to use a report variant previously created.

Procedure

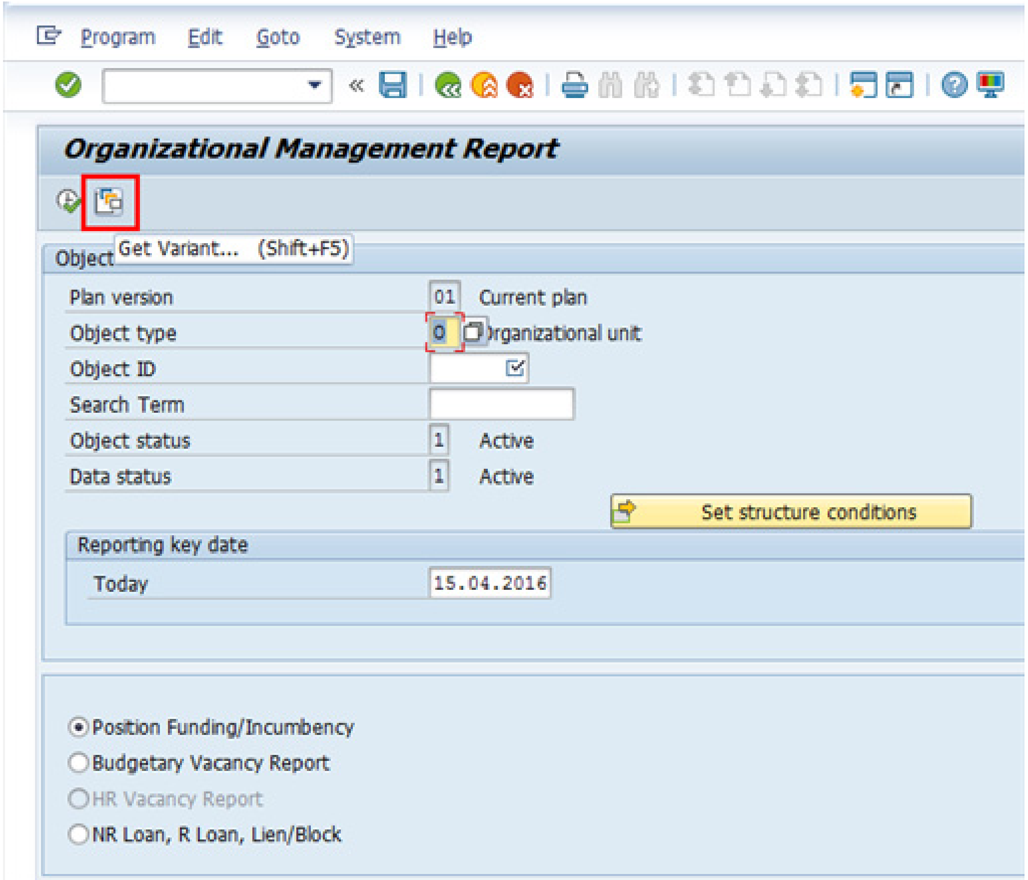
1. Start the transaction using the menu path or transaction code.

SAP Easy Access



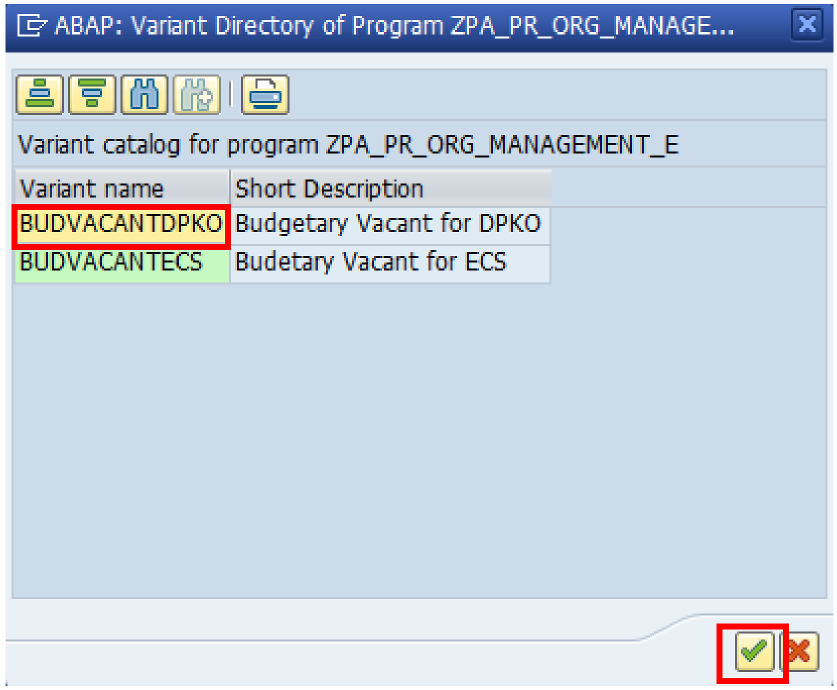
2. Enter the T-Code for the report you want to run [Scenario: zomreport1], then click .

Organizational Management Report



3. Click  to display the list of saved variants.

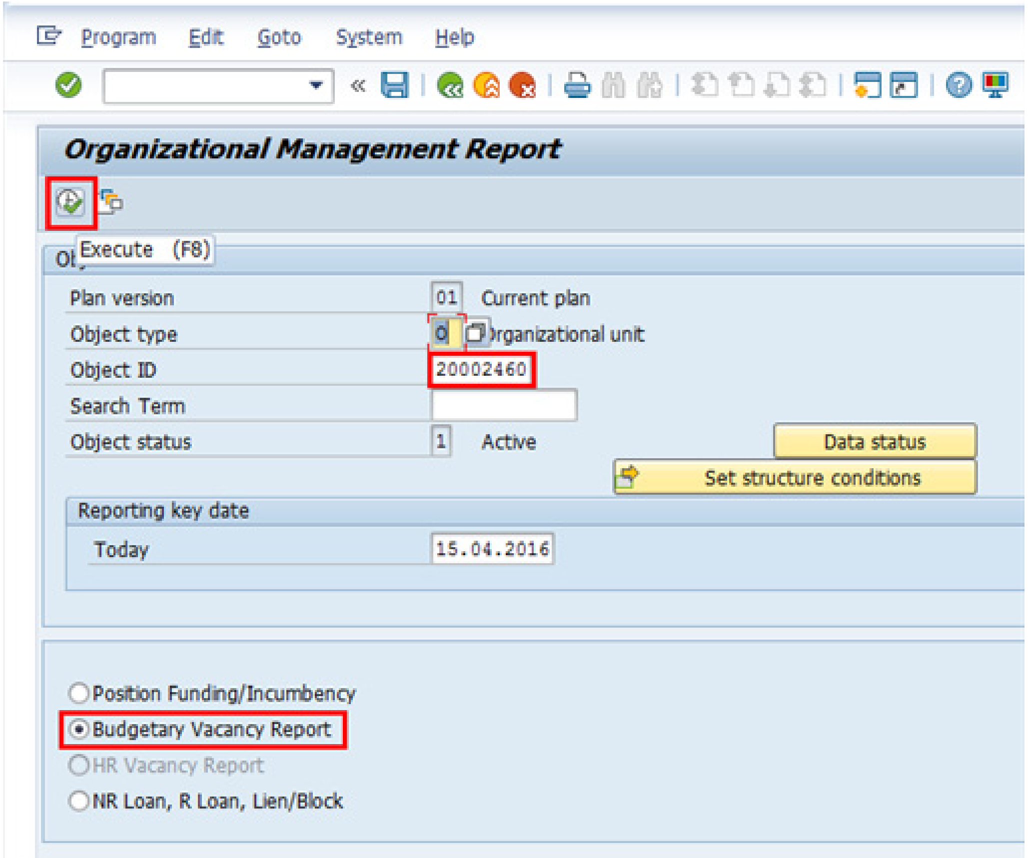
ABAP: Variant Directory of Program ZPA_PR_ORG_MANAGEMENT_E



4. Select the variant you want to use. [Scenario: BUDVACANTDPKO]

5. Click to confirm selection.

Organizational Management Report

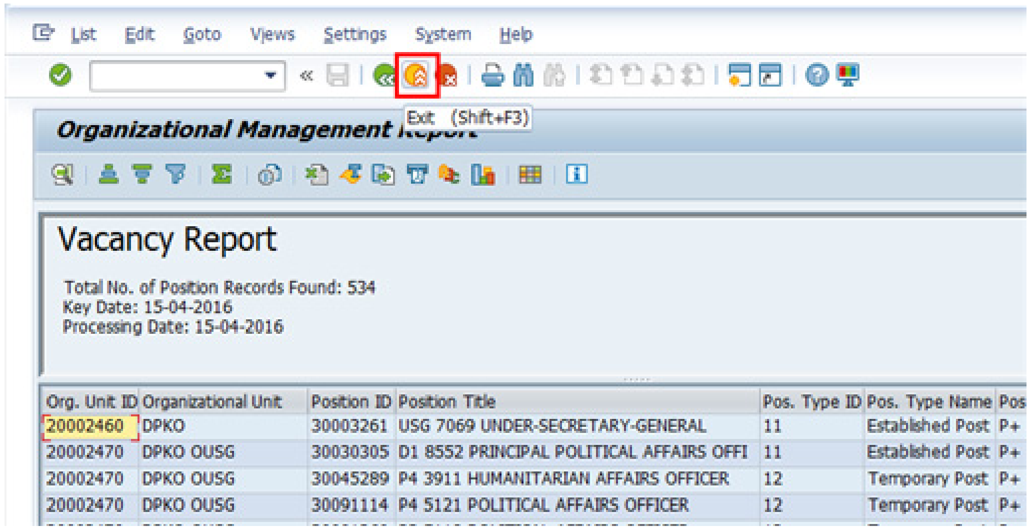


6. The report variant opens with all the preset values for the parameters. In this scenario, in addition to the default values for Plan version, and Object type, the variant values for Object ID and Budetary Vacancy Report are also set.

You may now either run the report as specified, or make any changes to these values as per the normal instructions for the report prior to running.

In this scenario,  is clicked to run the report as is.

Organizational Management Report



7. Click to return to the SAP Easy Access screen.

2.1.3 Execute a Report In the Background

New Content

Some reports take a long time and a lot of processing power to execute using the normal procedure. These reports may even fail to run if they take too long.

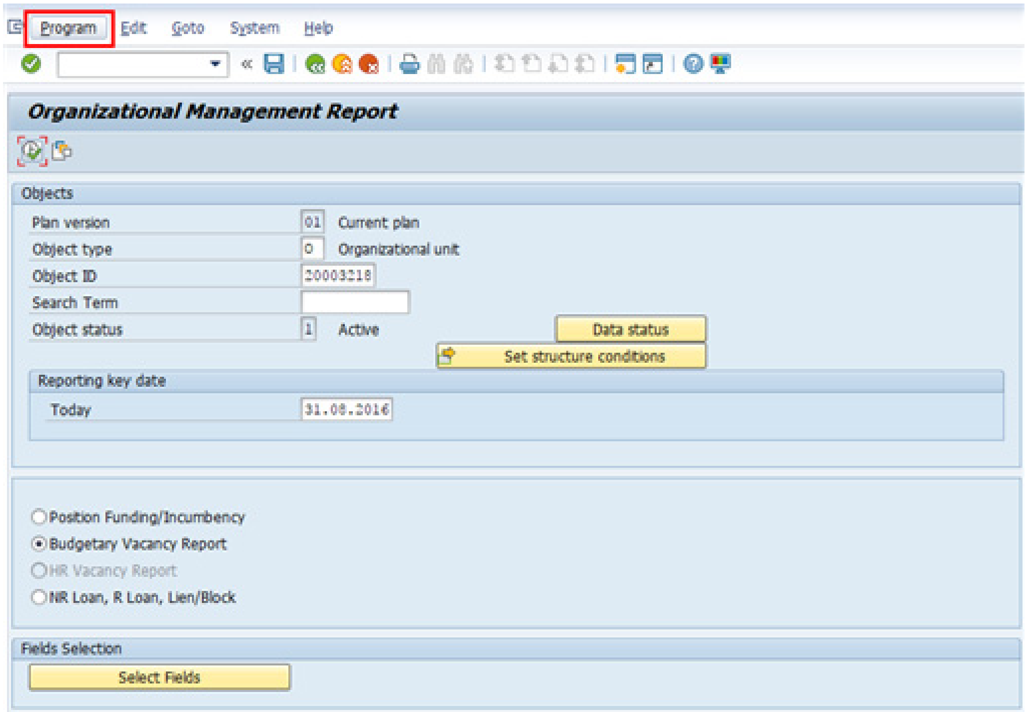
You can avoid these problems by choosing to execute the report in the background.

Procedure

1. Start the transaction using the menu path or transaction code.

Set up the report parameters and layout as per your needs.

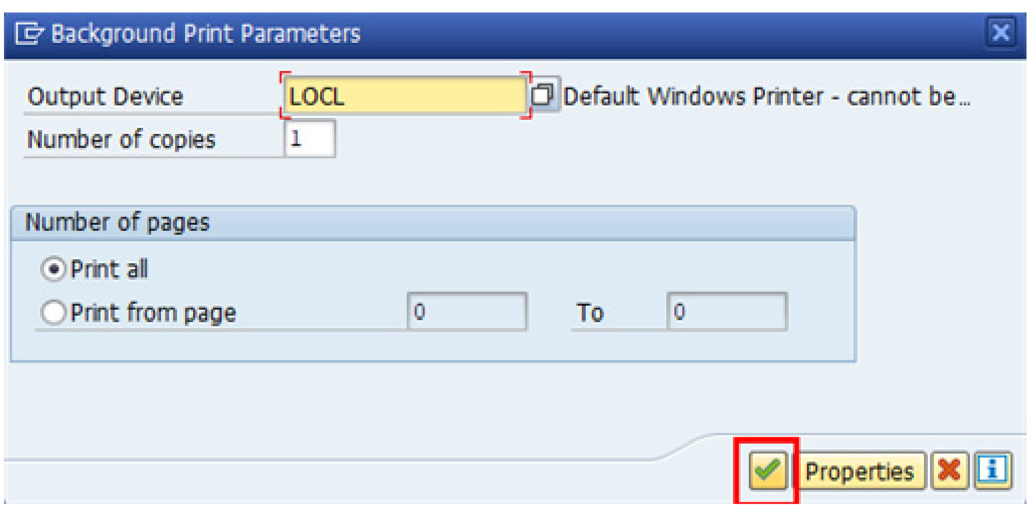
Organizational Management Report



2. Click Program.

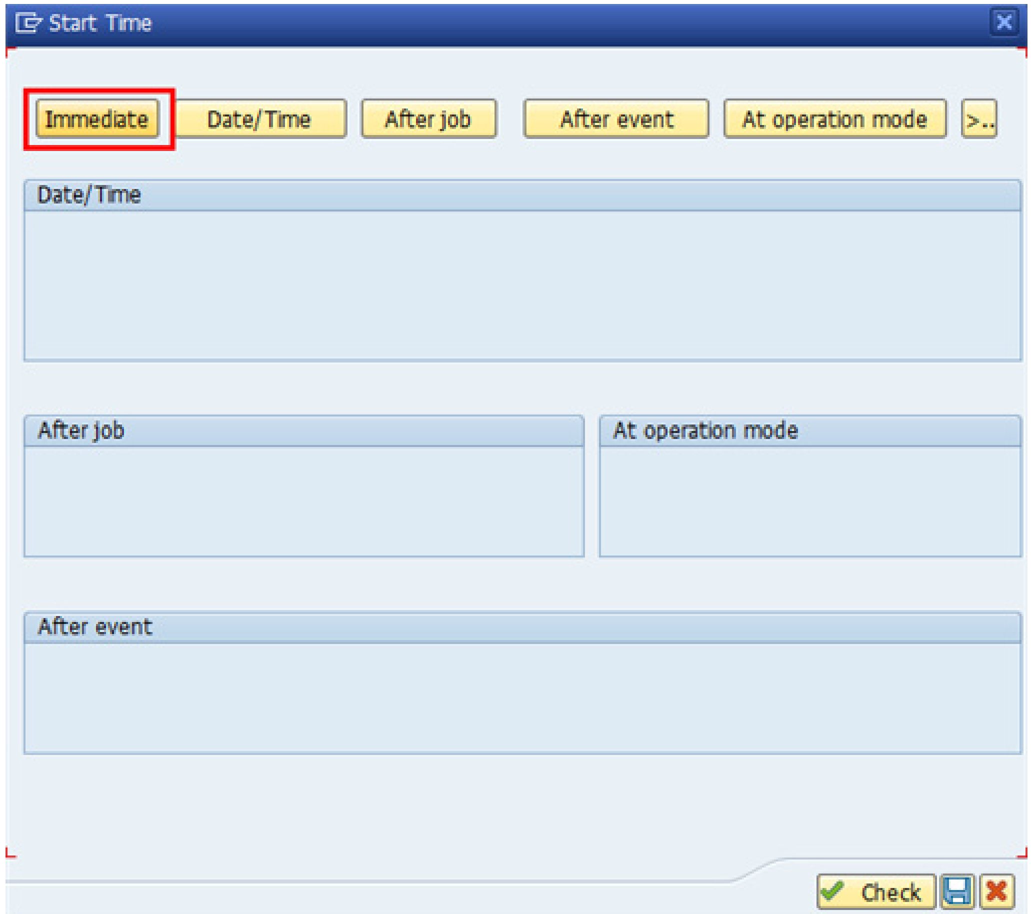
3. Then Execute in Background F9 to run the report in the background.

Background Print Parameters



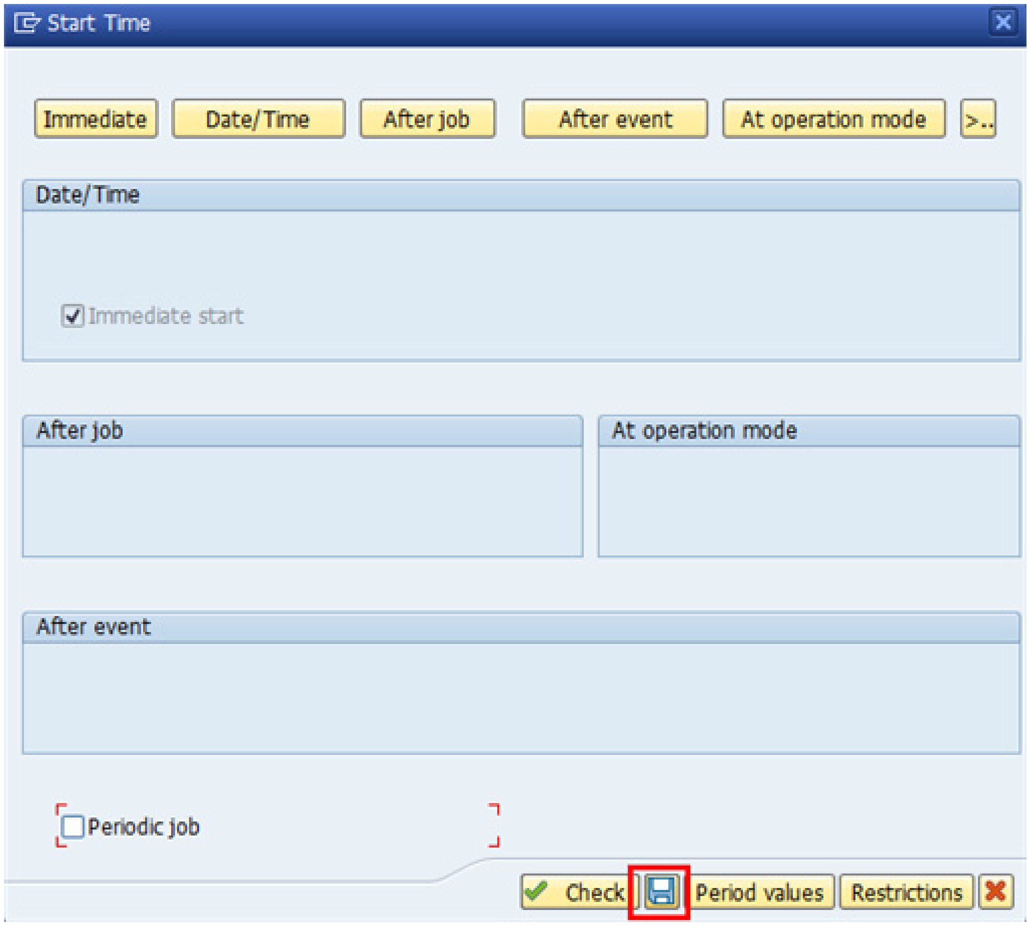
4. Leave the default values on the Background Print Parameters screen and click .

Start Time



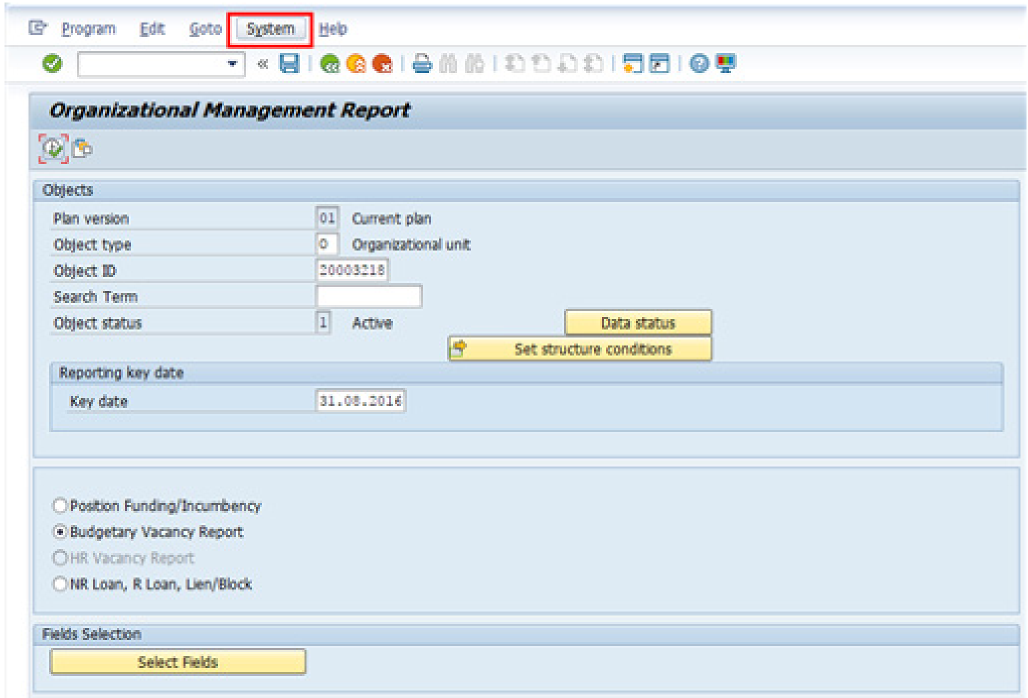
5. You can schedule the report to run on a specified schedule, or simply click Immediate for the report to run now.

Start Time



6. Click to sav these settings and run the report in the background.

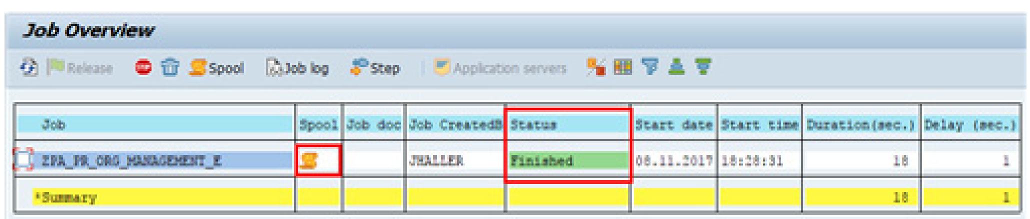
Organizational Management Report



7. To access the report results, click System.

8. Then Own Jobs.

Job Overview

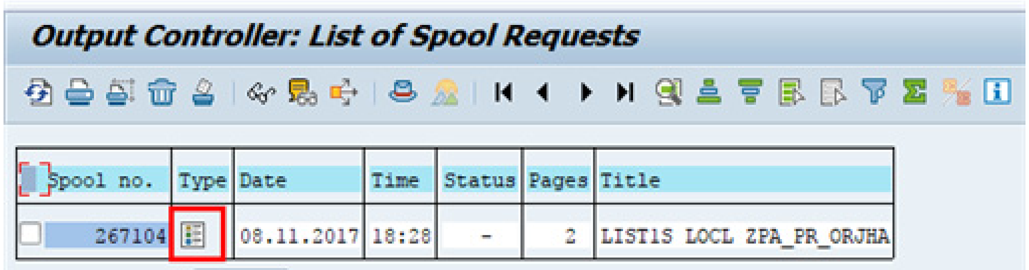


9. When the report execution is completed, you will see Finished in the Status column.

Double-click for the report you want to view.

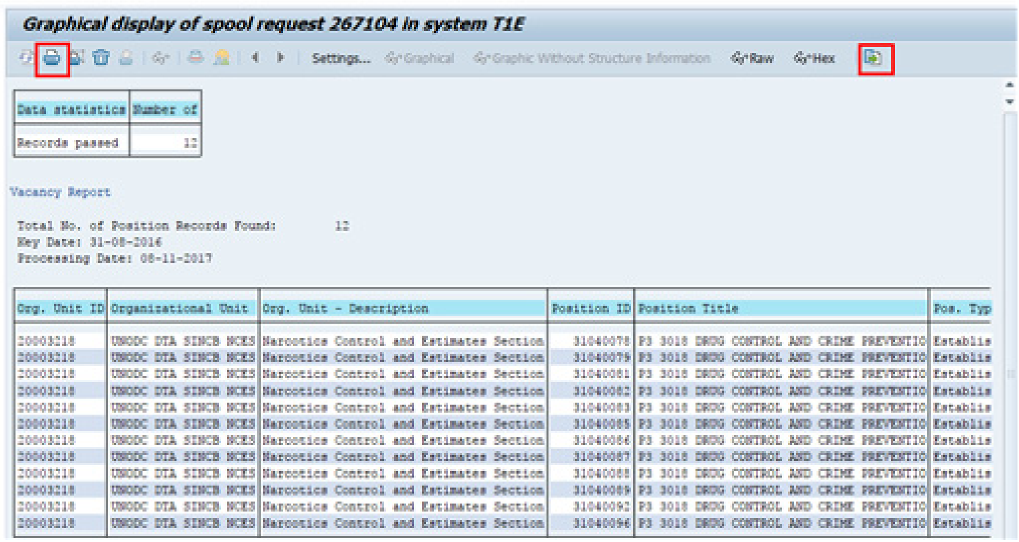
HR Partner All

Output Controller: List of Spool Requests



10. Click to view the report details.

Graphical display of spool request 267104 in system T1E



11. You can now work with the report online, print the report, or export to Excel following the normal procedures.

3 HR Reports

Umoja provides a number of pre-defined HR reports which can easily be run by users with appropriate access. The HR Partner All role has access to run the following HR reports documented in this job aid:

Report	T-Code	Description
Personnel Administration - Contracts		
Appointment Expiring List	ZPA_CONTEXP	This report uses a number of parameters that allow it to be used for multiple purposes (e.g., it can be run for both Fixed-Term and Temporary appointments).
Long Service Step List	ZPA_LONG_ELIG	This report generates a list of staff members who are eligible for the Long Service Step increment.
Entitlements		
Dependants Report	ZHR_DEPENDANTS	This report can be used to generate a list of staff members who have children who: • **will turn 18** by a given date • **will turn 21** by a given date • are in receipt of a **Government Grant** • are **Disabled** • are in full-time **Educational Attendance** • are **Financially Dependant**, or • any combination of the above.
Education Grant Advance Recovery	ZPA_EDUCATIONRECOVERIES	Use this report to generate a list of staff members with education grant advances scheduled for recovery.
Rental Subsidy Monitoring	ZEN_ENT_MONITORING	Use this procedure to generate Entitlements Monitoring Report for self-certified cases. This action should be completed after you have initiated rental subsidy entitlement monitoring, as a means to track staff member compliance.
Separation		
Staff Approaching Retirement Age	ZPA_RETIRING	Generates a list of staff members approaching retirement age.

3.1 Running Reports

You run reports either by entering the report's T-Code in the Command text box, or by navigating the menu tree and selecting the appropriate report.

Each report documented below uses a set of parameters to meet the need of the scenario stated at beginning of each report. Other parameter settings are possible, and you should use settings other than those shown here if your reporting needs are different from those stated in the scenario.

3.2 Personnel Administration - Contracts

Use the following procedures to run a(n):

- 3.2.1 Appointment Expiring List - Fixed Term
- 3.2.2 Appointment Expiring List - Temporary
- 3.2.3 Long-Service Step List

3.2.1 Appointment Expiring List - Fixed Term

This report uses a number of parameters that allow it to be used for multiple purposes (e.g., it can be run for both Fixed-Term and Temporary appointments).

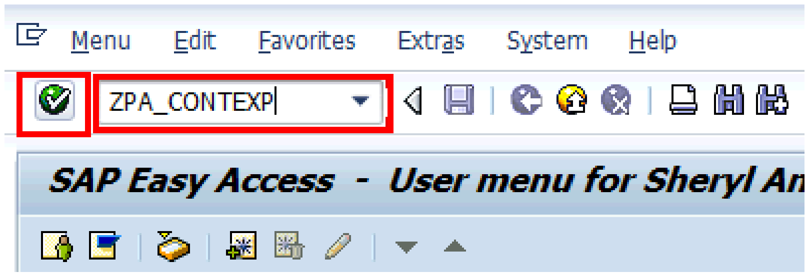
Scenario

A report is needed listing all Fixed-Term appointments that will expire 6 months from now.

Procedure

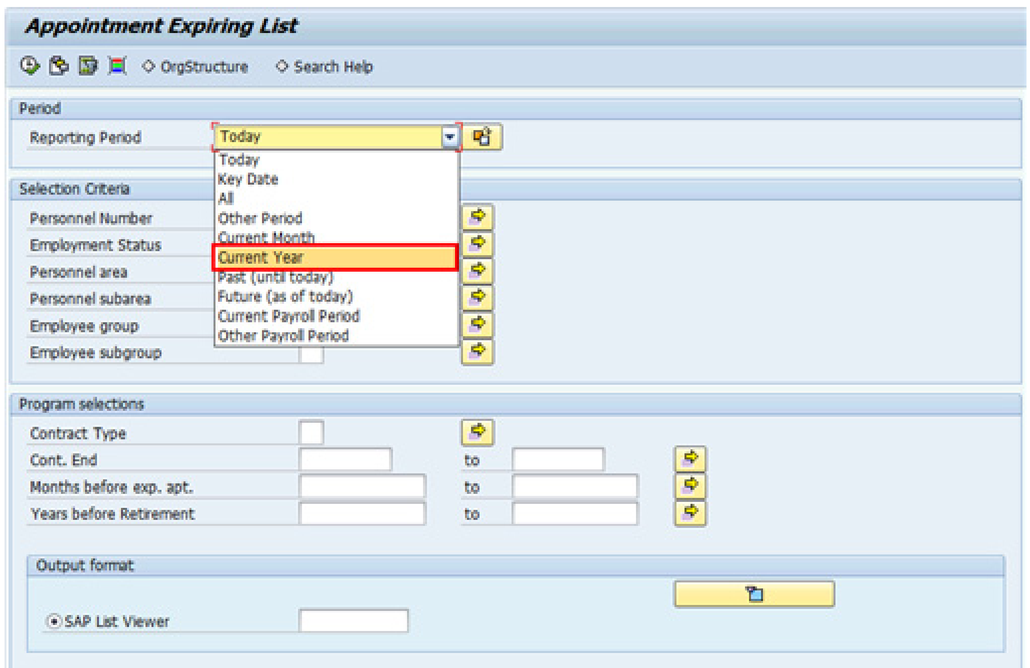
1. Start the transaction using the menu path or transaction code.

SAP Easy Access - User menu for Sheryl Ann Medina - \\Remote



2. Click after typing ZPA_CONTEXP in the command text box.

Appointment Expiring List - \\Remote

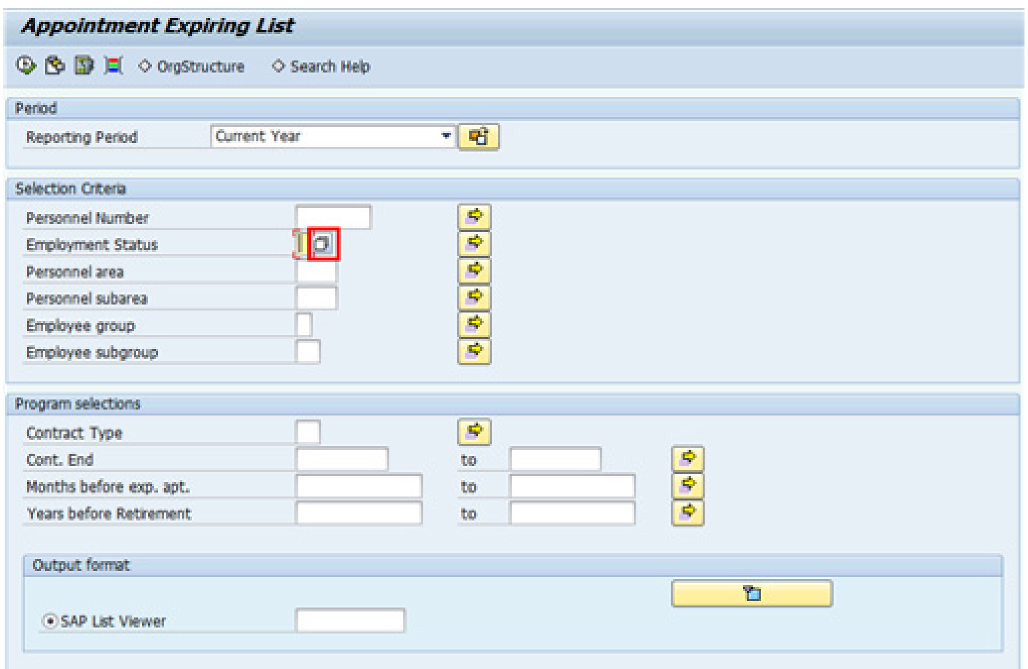


3. From the Reporting Period dropdown, select the period for which you want to run the report. [Scenario: Click Current Year .]

Reporting Period options are:

- Today
- Key Date
- All
- Other Period
- Current Month
- Current Year
- Past (until today)
- Future (as of today)
- Current Payroll Period
- Other Payroll Period

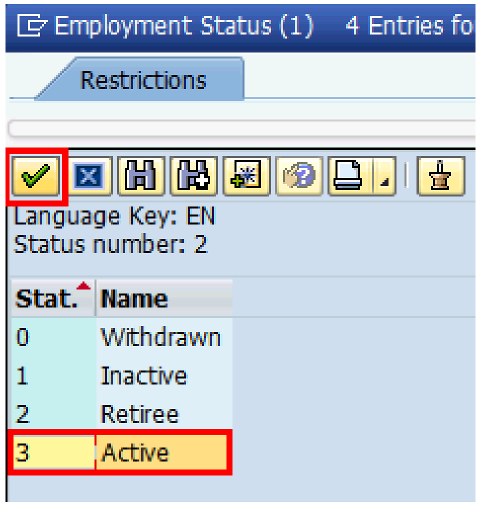
Appointment Expiring List - \\Remote



4. Click to see the list of options for Employment Status.

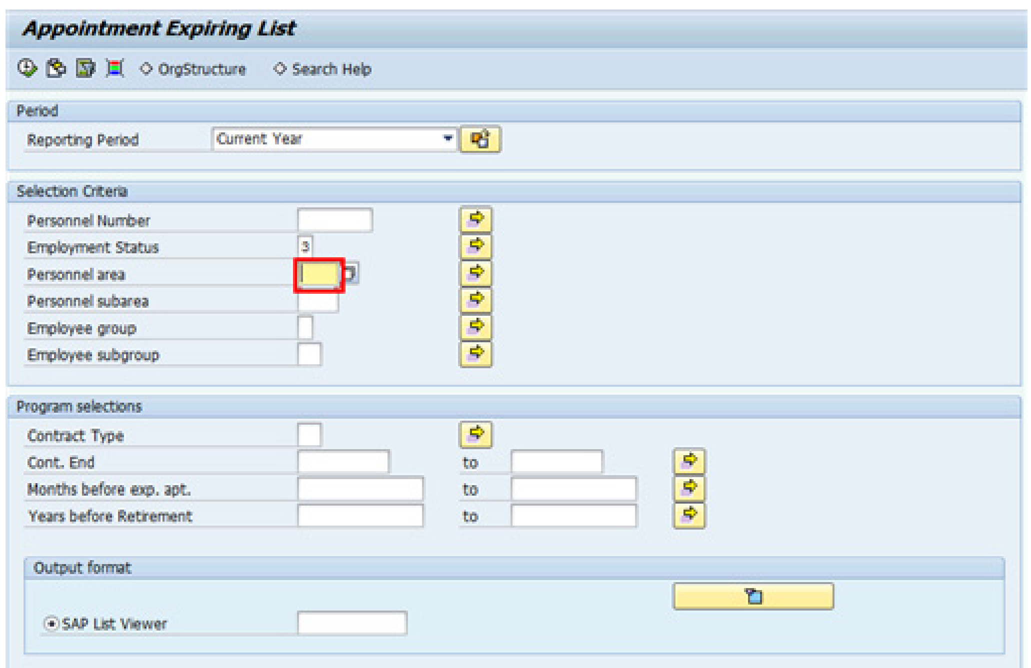
5. Select 3 Active to limit the report to currently active staff members.

Employment Status (1) 4 Entries found - \\Remote



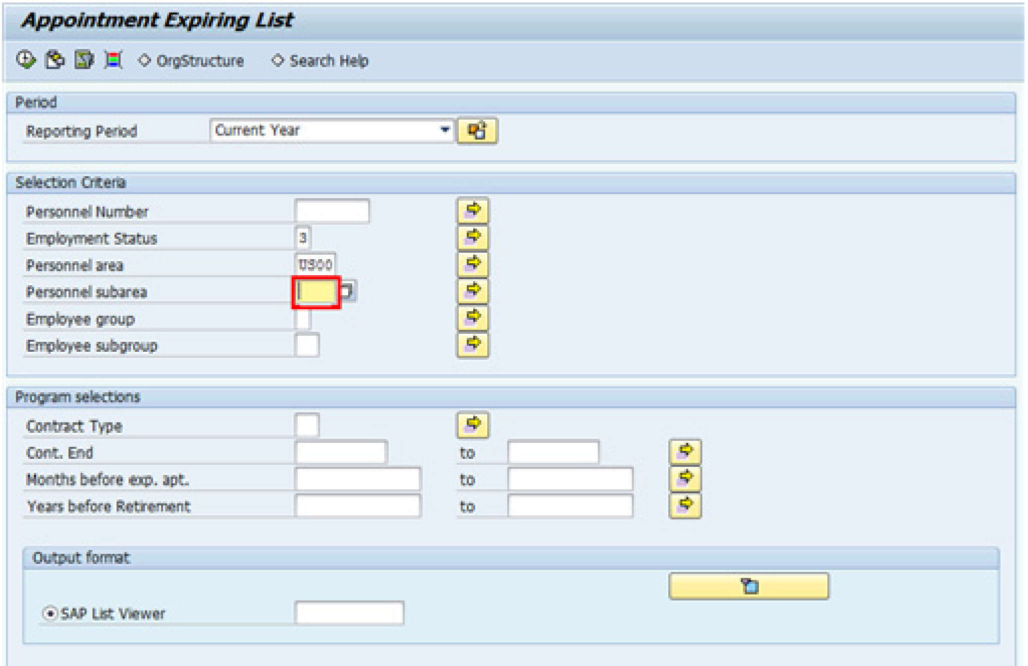
6. Click to confirm the selection.

Appointment Expiring List - \\Remote



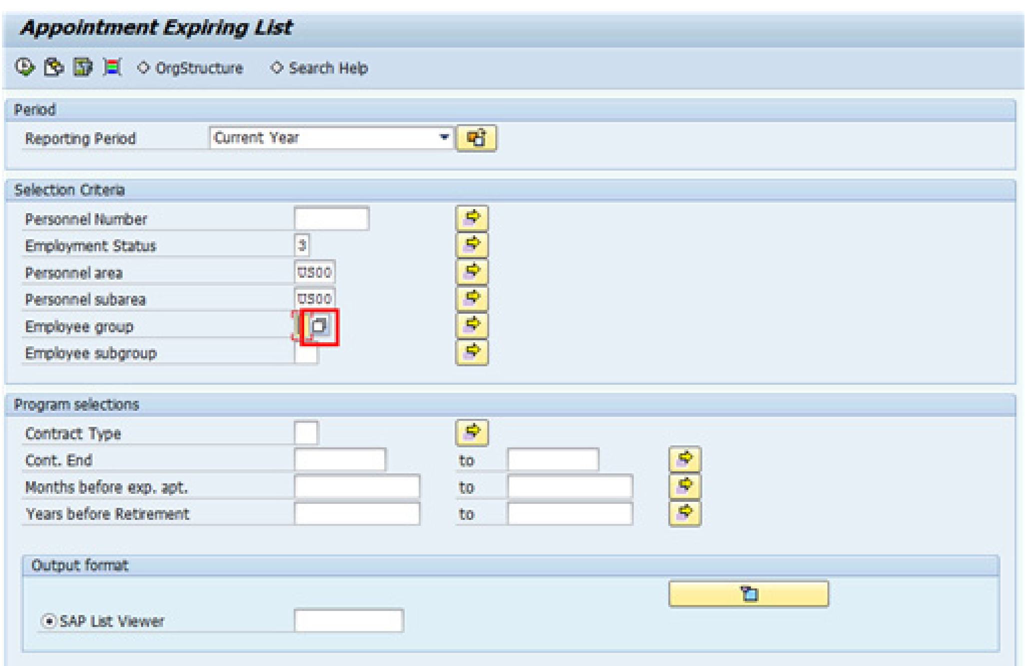
7. Enter (or search for) the country code in the Personnel area text box. [SCENARIO: US00]

Appointment Expiring List - \\Remote



8. Enter the duty station code in the Personnel subarea text box. [SCENARIO: US00]

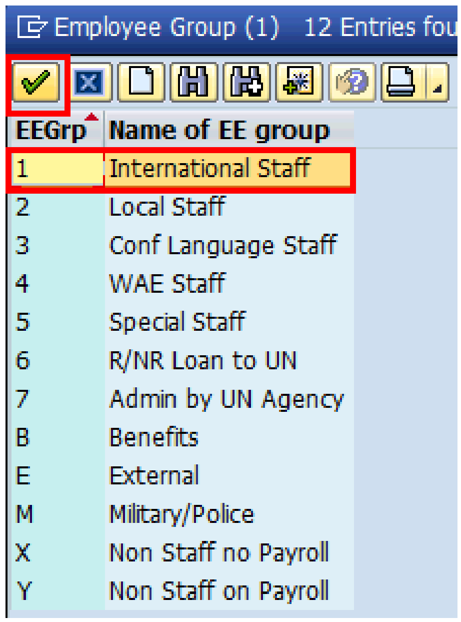
Appointment Expiring List - \\Remote



9. Click to see the list of options for Employee group.

10. Select the Employee group that you want to monitor.
[SCENARIO: 1 International Staff]

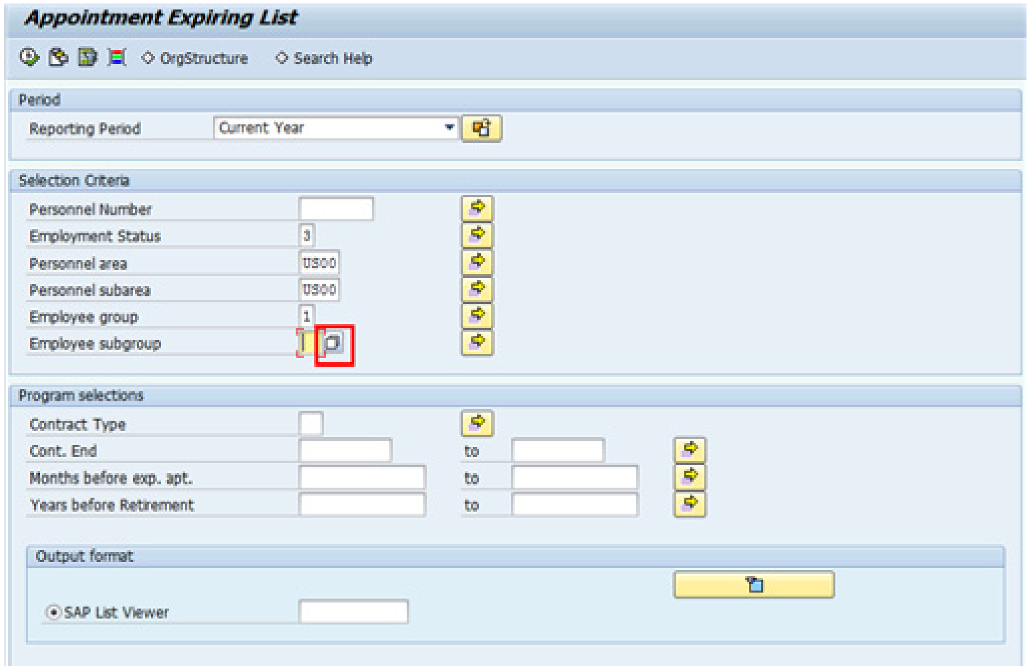
Employee Group (1) 12 Entries found - \\Remote



EEGrp	Name of EE group
1	International Staff
2	Local Staff
3	Conf Language Staff
4	WAE Staff
5	Special Staff
6	R/NR Loan to UN
7	Admin by UN Agency
B	Benefits
E	External
M	Military/Police
X	Non Staff no Payroll
Y	Non Staff on Payroll

11. Click to proceed.

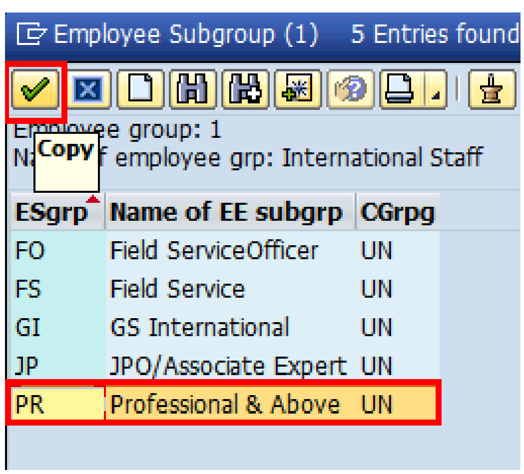
Appointment Expiring List - \\Remote



12. Click to see the list of options for Employee subgroup.

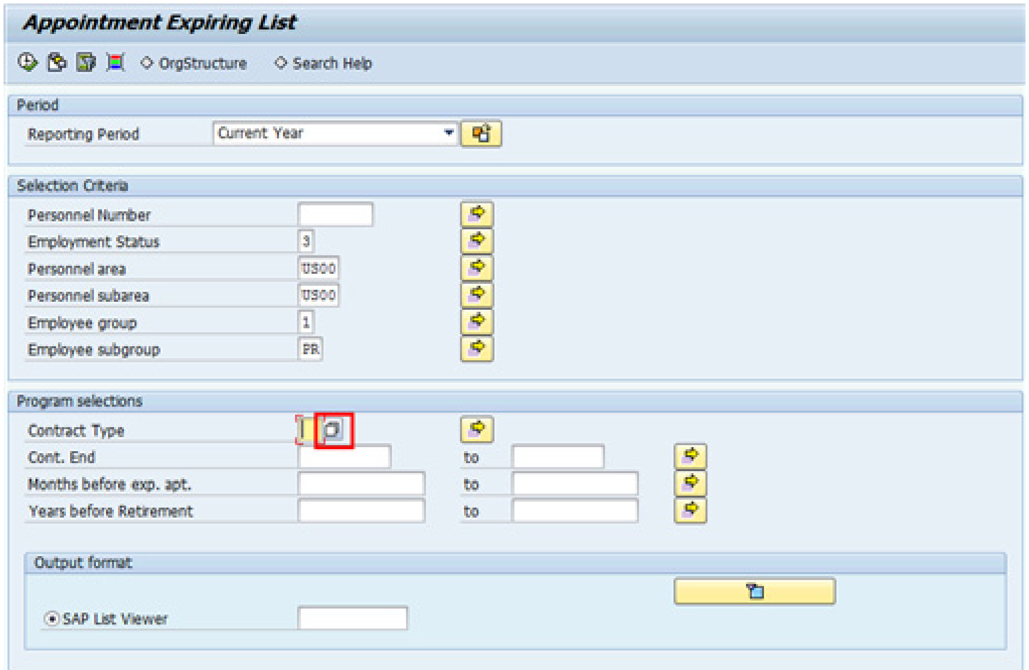
13. Select the appropriate Employee subgroup that you want to monitor. [SCENARIO: PR Professional & Above]

Employee Subgroup (1) 5 Entries found - \\Remote



14. Click to confirm selection.

Appointment Expiring List - \\Remote

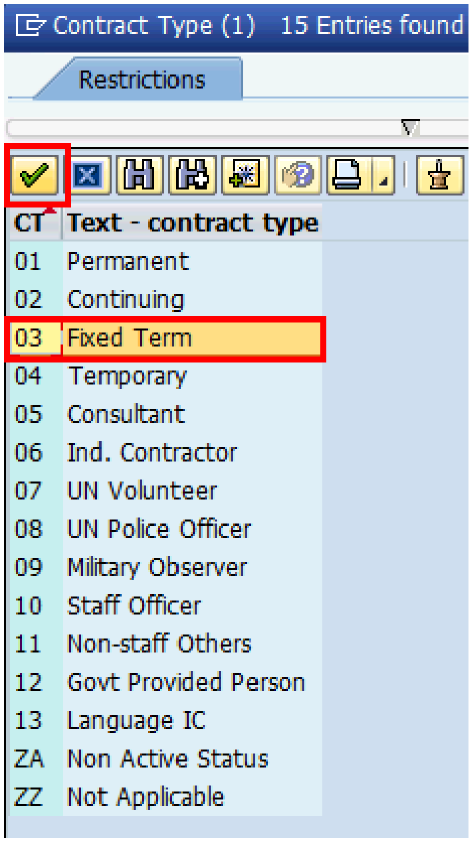


15. Click to see the list of Contract Types.

16. Select the appropriate Contract Type that you want to monitor. [SCENARIO: 03 Fixed Term]

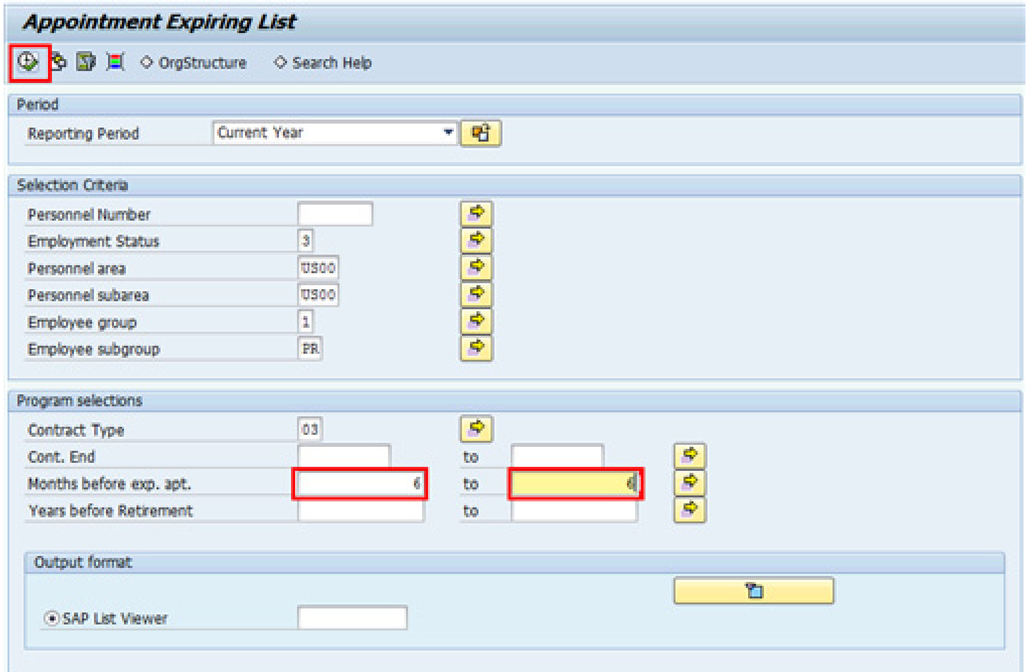
To run the report for temporary appointments, select 04 Temporary.

Contract Type (1) 15 Entries found - \\Remote



17. Click  to confirm selection.

Appointment Expiring List - \\Remote



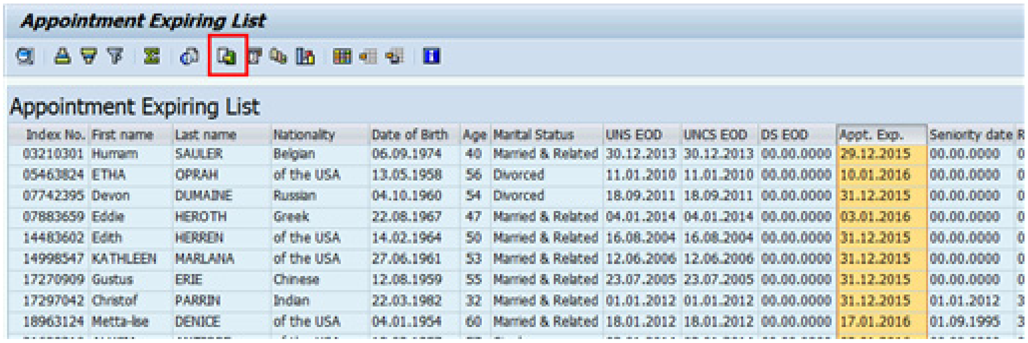
18. You can specify the appointment expiration range you want to include in the report. For a single point in the future, for example, six months from now, enter the same number in the **Months before exp. apt.** text box and the **to** text box. [Scenario: 6 months]

For a broader range, for example 4 to 7 months from now, enter these values in the the **Months before exp. apt.** text box and the **to** text box.

Click  to run the report.

19. The system generates a list of staff members whose appointments will expire in the specified range. [Scenario: 6 months]

Appointment Expiring List - \\Remote

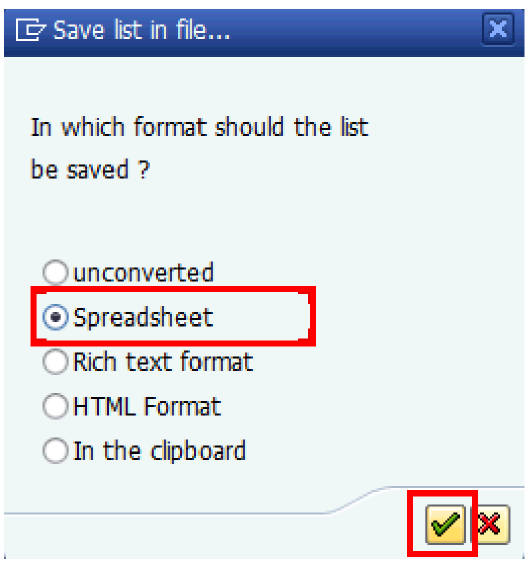


Index No.	First name	Last name	Nationality	Date of Birth	Age	Marital Status	UNS EOD	UNCS EOD	DS EOD	Appt. Exp.	Seniority date	R
03210301	Humam	SAULER	Belgian	06.09.1974	40	Married & Related	30.12.2013	30.12.2013	00.00.0000	29.12.2015	00.00.0000	0
05463824	ETHA	OPRAH	of the USA	13.05.1958	56	Divorced	11.01.2010	11.01.2010	00.00.0000	10.01.2016	00.00.0000	0
07742395	Devon	DUMAINE	Russian	04.10.1960	54	Divorced	18.09.2011	18.09.2011	00.00.0000	31.12.2015	00.00.0000	0
07883659	Eddie	HEROTH	Greek	22.08.1967	47	Married & Related	04.01.2014	04.01.2014	00.00.0000	03.01.2016	00.00.0000	0
14483602	Edith	HERREN	of the USA	14.02.1964	50	Married & Related	16.08.2004	16.08.2004	00.00.0000	31.12.2015	00.00.0000	0
14998547	KATHLEEN	MARLANA	of the USA	27.06.1961	53	Married & Related	12.06.2006	12.06.2006	00.00.0000	31.12.2015	00.00.0000	0
17270909	Gustus	ERIE	Chinese	12.08.1959	55	Married & Related	23.07.2005	23.07.2005	00.00.0000	31.12.2015	00.00.0000	0
17297042	Christof	PARRIN	Indian	22.03.1982	32	Married & Related	01.01.2012	01.01.2012	00.00.0000	31.12.2015	01.01.2012	3
18963124	Metta-lise	DENICE	of the USA	04.01.1954	60	Married & Related	18.01.2012	18.01.2012	00.00.0000	17.01.2016	01.09.1995	3

20. You can save this report as an excel file by clicking . Once you have the excel file, you can easily filter values or hide fields that are not necessary.

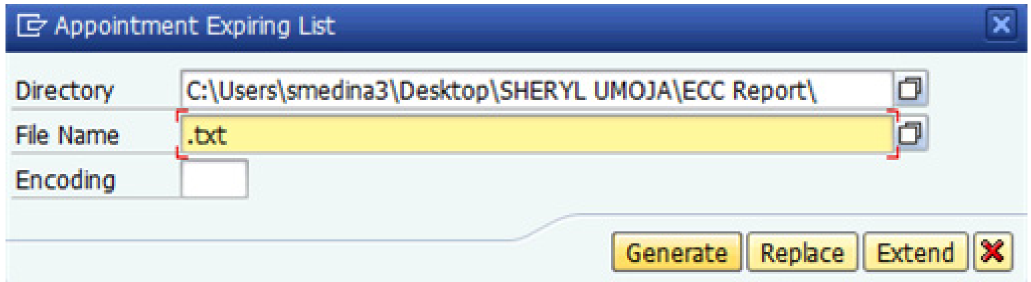
21. Click Spreadsheet .

Save list in file... - \\Remote



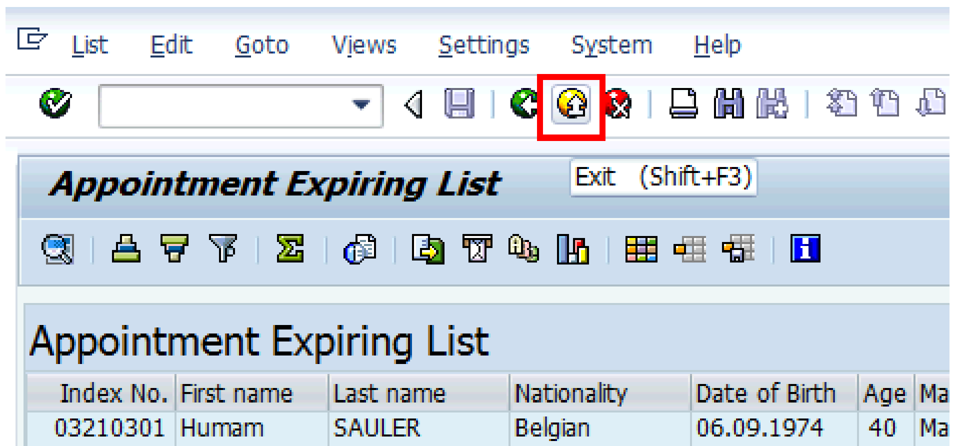
22. Click to confirm selection.

Appointment Expiring List - \\Remote



23. Select a Directory on your computer to save the file. Enter a file name, then click Generate.

Appointment Expiring List - \\Remote



24. Click  to return to the SAP Easy Access screen.

3.2.2 Appointment Expiring List - Temporary

See instructions for running this report found in the procedures section of the *Fixed-Term Appointment Renewal* chapter in this job aid.

3.2.3 Long-Service Step List

Use this report to generate a list of staff members who are eligible for the Long Service Step increment.

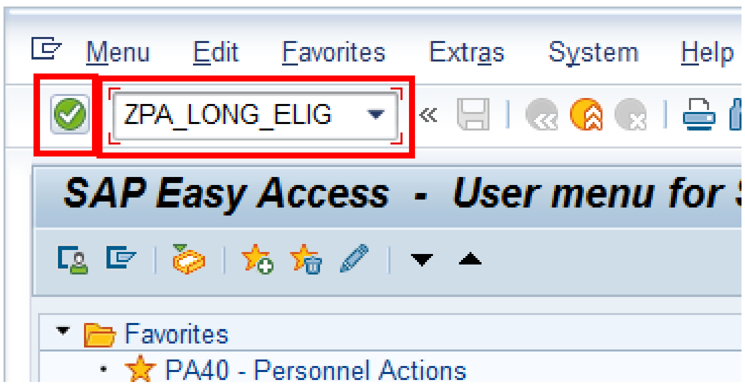
Scenario

A report is needed listing all DPKO staff members who are eligible for the Long Service Step increment.

Procedure

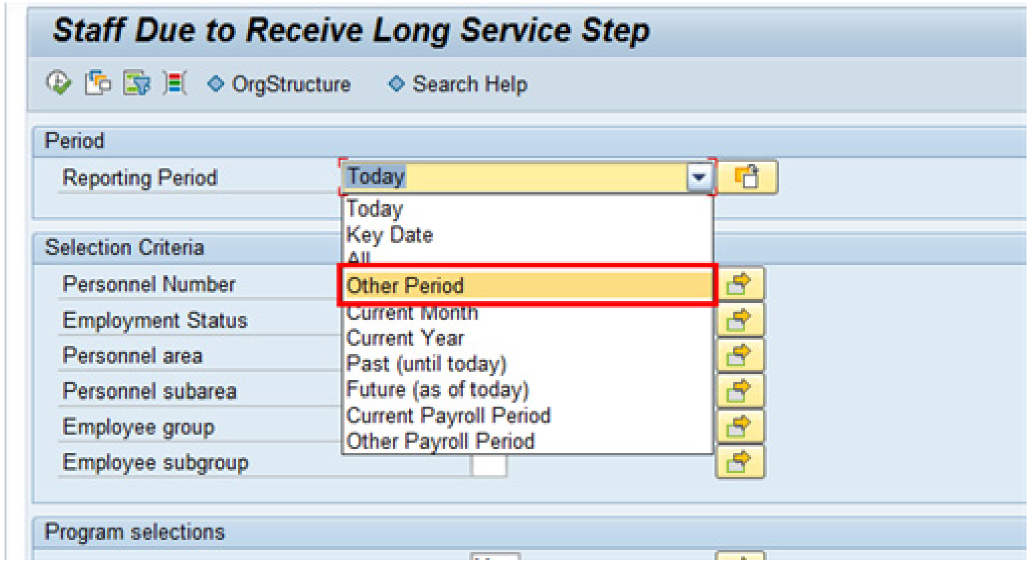
1. Start the transaction using the menu path or transaction code.

SAP Easy Access - User menu for Sheryl Ann Medina



2. Click after typing ZPA_LONG_ELIG in the command text box.

Staff Due to Receive Long Service Step



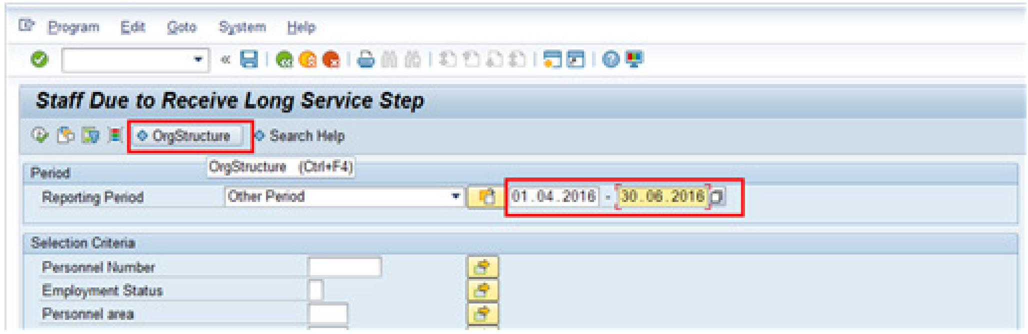
3. From the Reporting Period dropdown, select the period for which you want to run the report. [SCENARIO: "Other Period]

This report has to be generated on a quarterly basis.

Reporting Period options are:

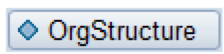
- **Today** – used to filter the records by today's date. The system will display staff members eligible to received long service step as of today.
- **Key Date** - used to filter the records by the date you entered. For example, if you enter 01.04.2016 as the key date the system will display staff members eligible to receive long service step on 01.04.2016.
- **All** – used to display a list of all staff who are eligible to receive long service step from 01.01.1800 through 31.12.9999.
- **Other Period** - used to filter the records by the date range you entered. For example, if you enter 01.04.2016 - 30.04.2016 the system will display a list of staff who are eligible to received long service step between 01.04.2016 through 30.06.2016.
- **Current Month** – used to filter the records by the current month. The system will display a list of staff who are eligible to receive long service step in the current month.
- **Current Year** – used to filter the records by the current year. The system will display a list of staff who are eligible to receive long service step in the current year.
- **Past (until today)** – used to filter the records from the Umoja deployment date to the current date. The system will display a list of staff who are eligible to receive long service step from 01.01.1800 up to the today's date.
- **Future (as of today)** – used to filter the records by the current date and future dates. The system will display a list of staff who are eligible to receive long service step as of the current date and beyond.
- **Current Payroll Period** - used to filter the records by the current payroll period. The system will display a list of staff who are eligible to receive long service step for the current payroll period.
- **Other Payroll Period** - used to filter the records a payroll period specified by providing a month and year (past or future). The system will display a list of staff who are eligible to receive long service step for the specified payroll period.

Staff Due to Receive Long Service Step



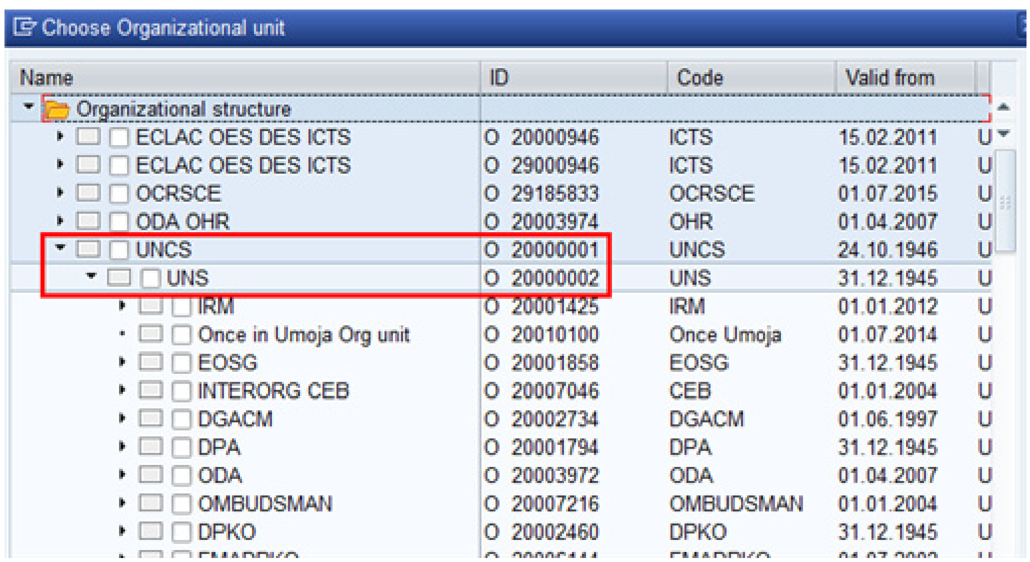
4. Enter a date range. [Scenario: start date: 01.04.2016 and end date: 30.06.2016]

5. Locate the Organizational Structure that you want to run a report.

Click 

to display the list of organizational units.

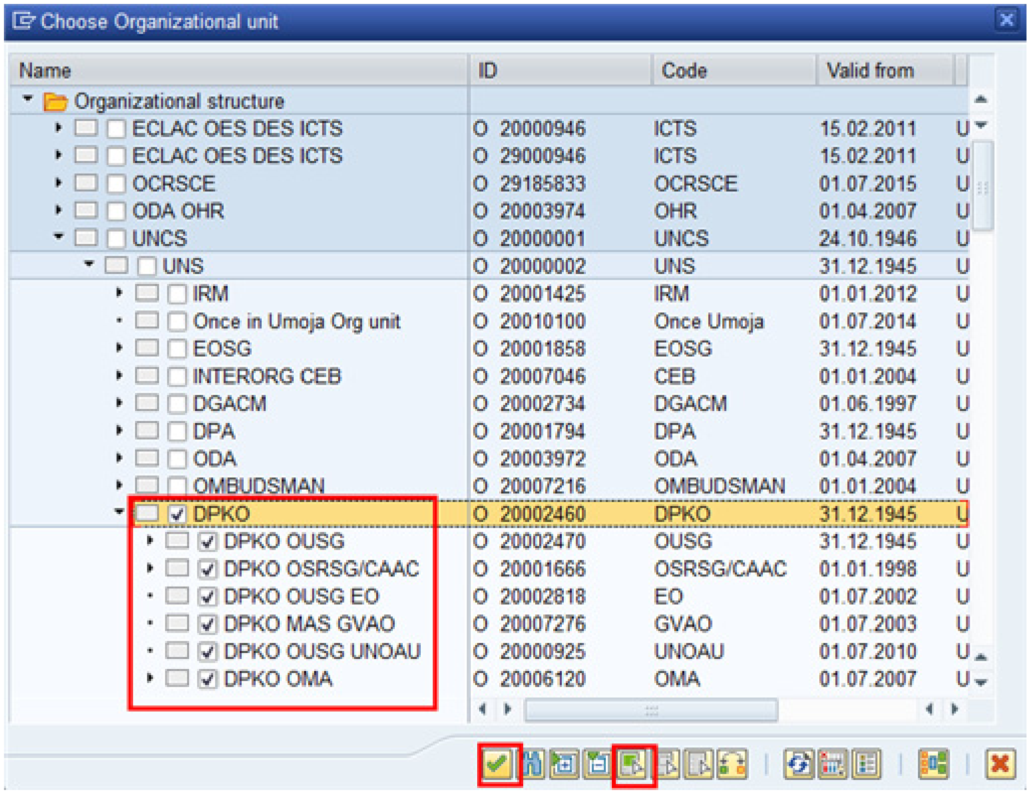
Choose Organizational unit



6. Locate the organizational unit. [Scenario: UNCS O 20000001]

Locate the department, mission or office that you want to run a report. Click  to expand and view the Sub-Organizational Units. [Scenario: UNS]

Choose Organizational unit



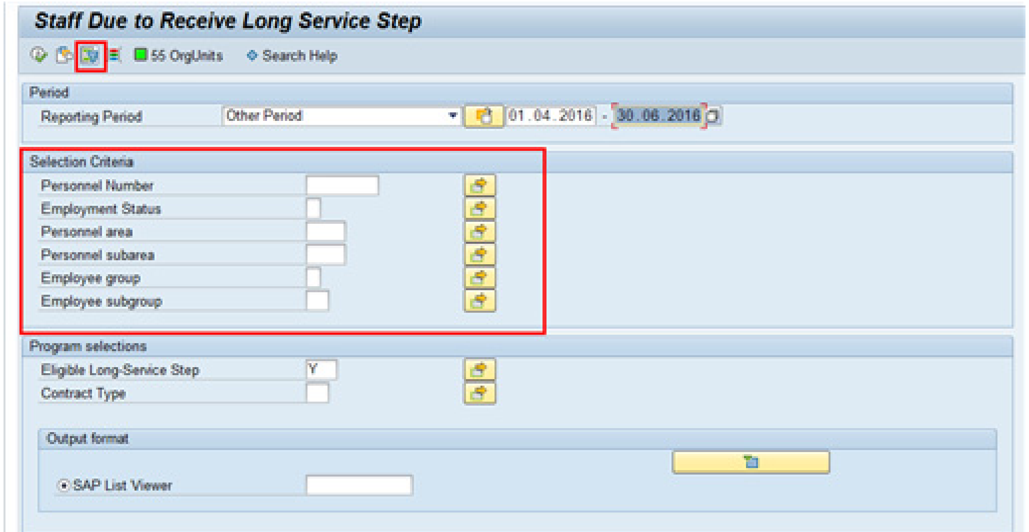
7. Select the department by placing a checkmark next to its name. [Scenario: DPKO]

8. Click ▸ to display the offices associated with the selected department.

9. Select the offices you want to run a report. If you want to run a report for all the offices click on the icon to select ALL offices. However, you may also just click on one office or more.

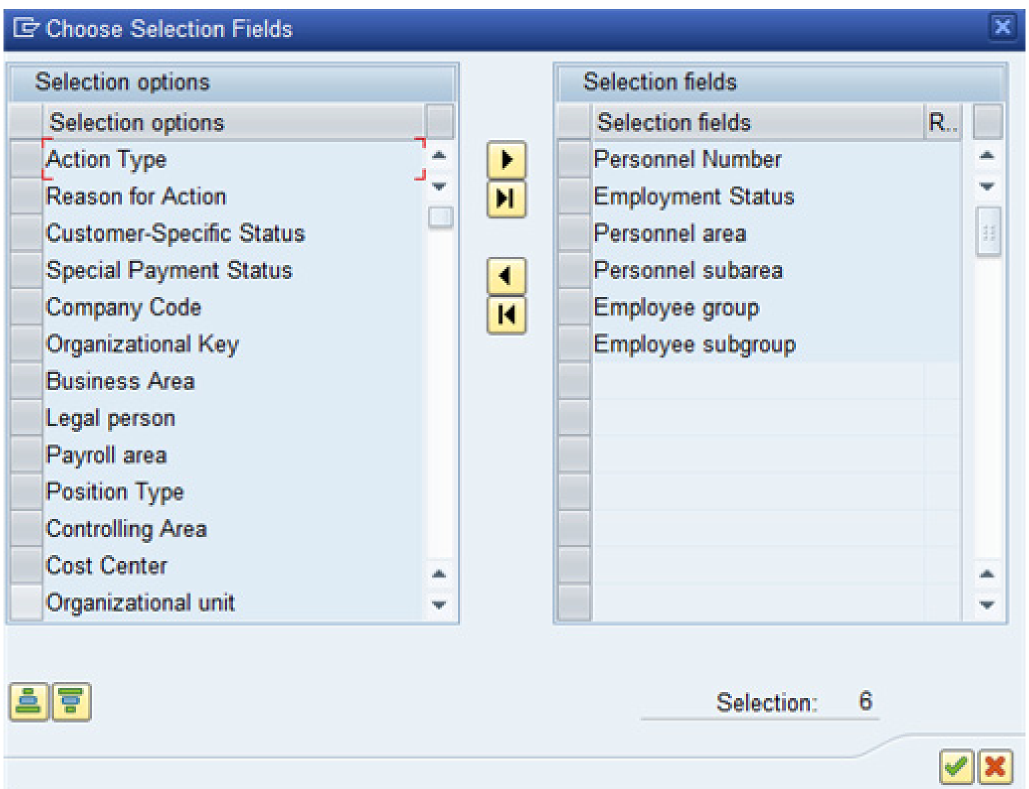
10. Click the icon to proceed.

Staff Due to Receive Long Service Step



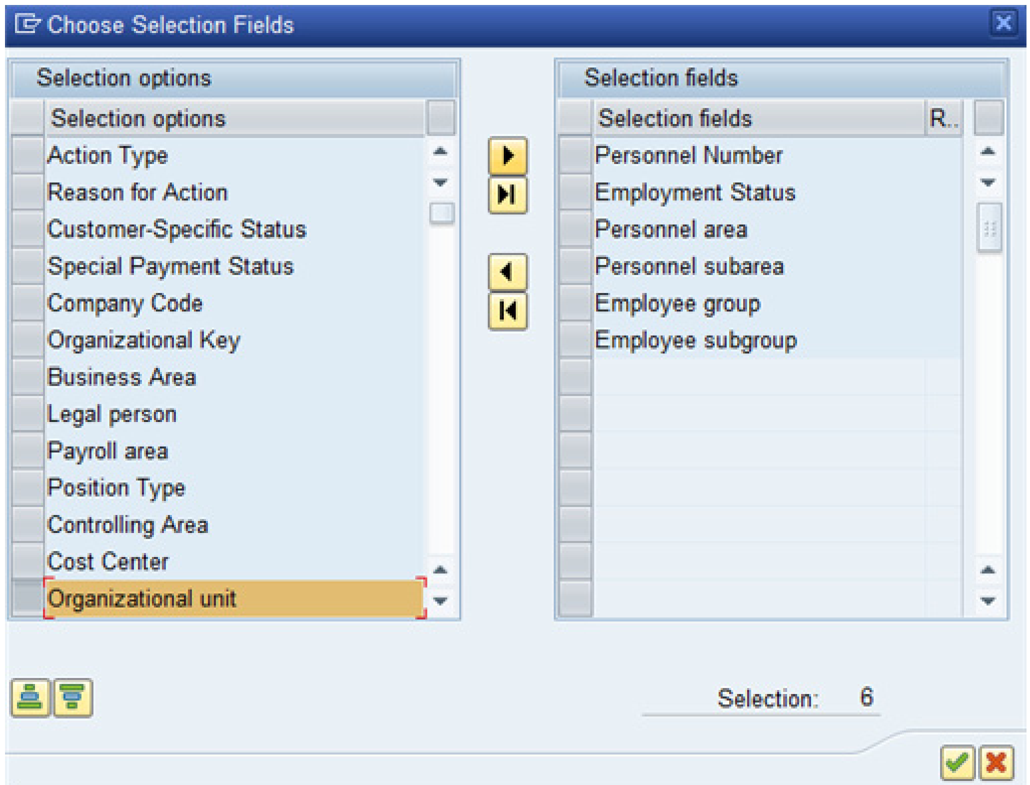
11. Select one or more Selection Criteria, if you do not see the parameters you want, click or press F2 on your keyboard.

Choose Selection Fields



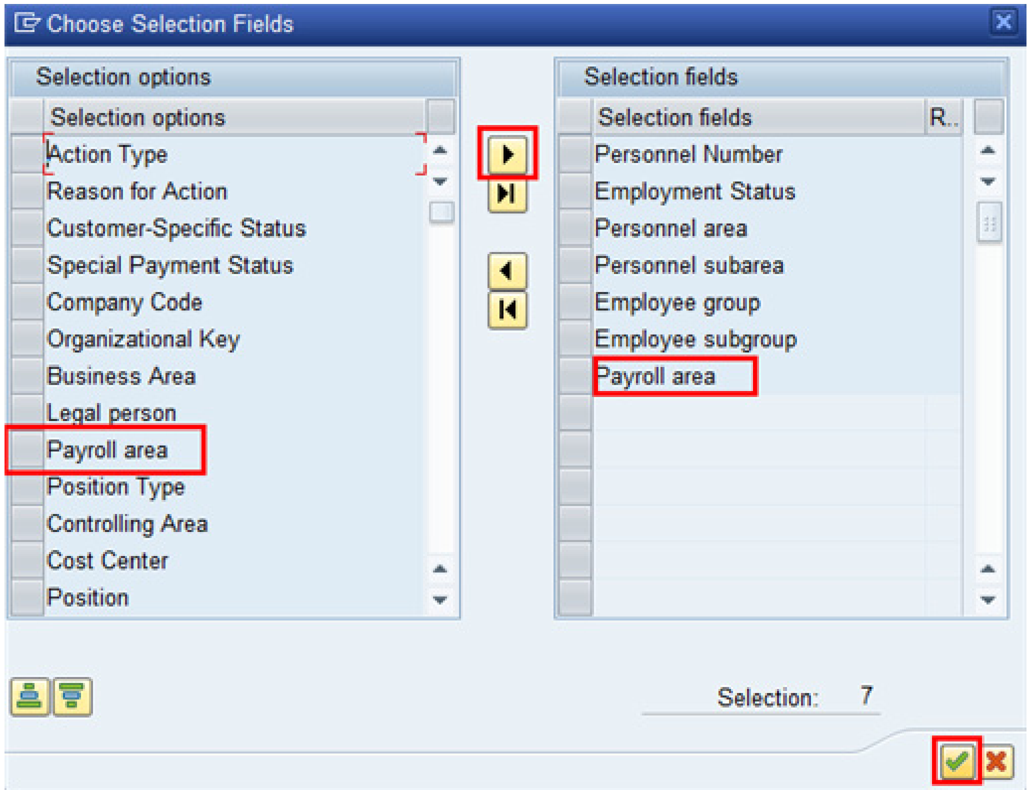
12. Scroll through the list and find the field that you need to use in running this report. Click (grey box) to select the field that you want to use.

Choose Selection Fields



13. Click to move the chosen field to the Selection field section.

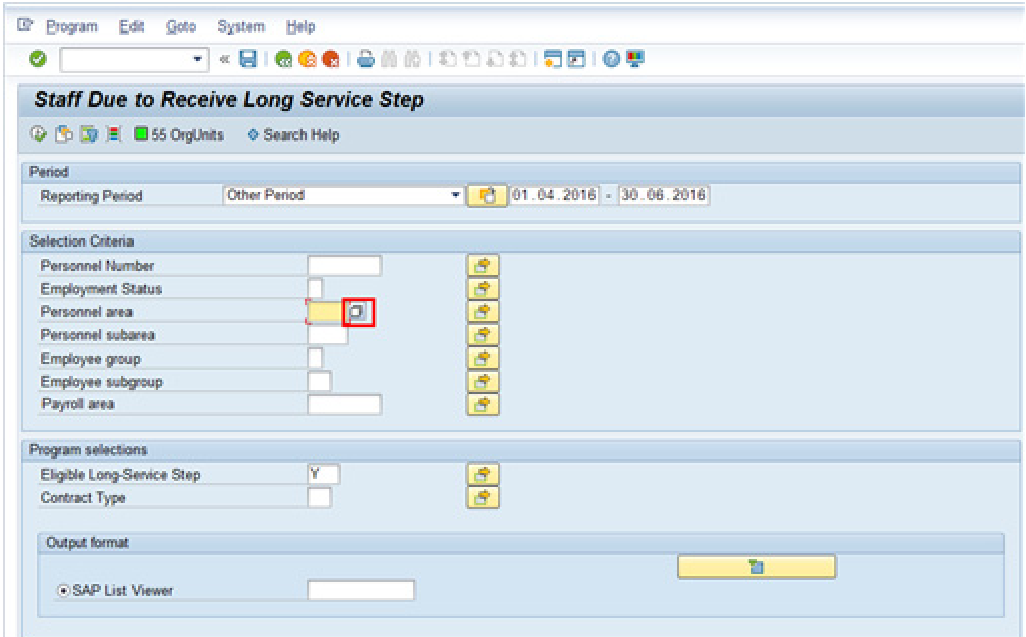
Choose Selection Fields



14.

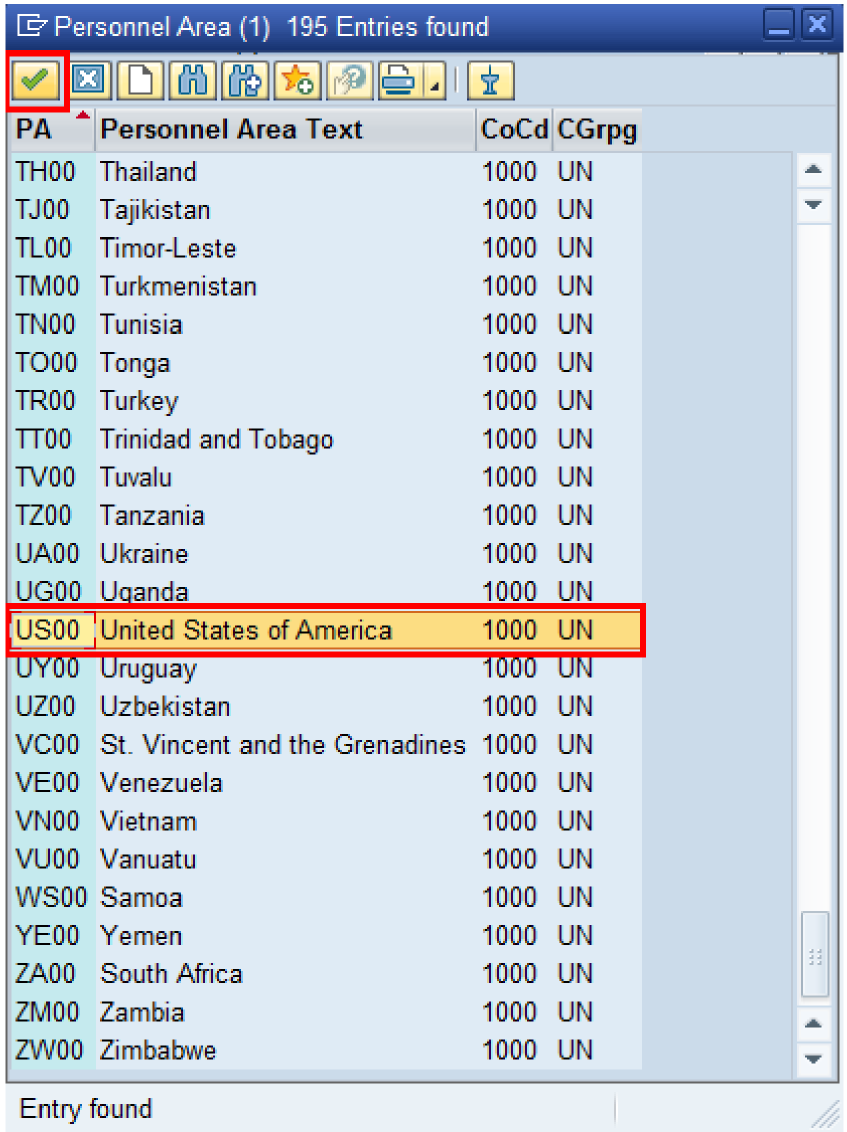
Select the option in the Selection options section and click on  . You will notice that the field you selected [SCENARIO: Payroll area] is now under the Selection fields section. Click  to continue.

Staff Due to Receive Long Service Step



15. If you know the country code, enter it in the Personnel area text box. Otherwise, click  to search.

Personnel Area (1) 195 Entries found



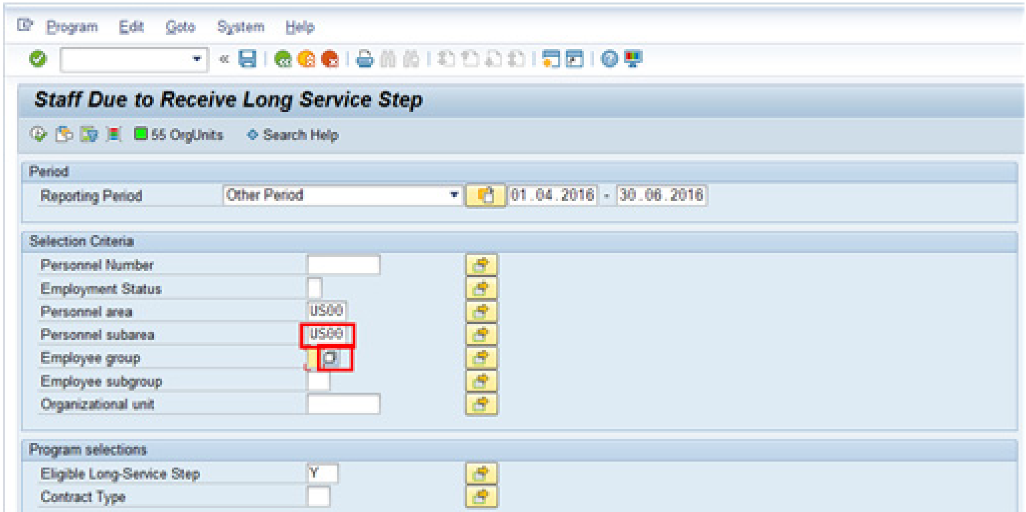
PA	Personnel Area Text	CoCd	CGrpg
TH00	Thailand	1000	UN
TJ00	Tajikistan	1000	UN
TL00	Timor-Leste	1000	UN
TM00	Turkmenistan	1000	UN
TN00	Tunisia	1000	UN
TO00	Tonga	1000	UN
TR00	Turkey	1000	UN
TT00	Trinidad and Tobago	1000	UN
TV00	Tuvalu	1000	UN
TZ00	Tanzania	1000	UN
UA00	Ukraine	1000	UN
UG00	Uganda	1000	UN
US00	United States of America	1000	UN
UY00	Uruguay	1000	UN
UZ00	Uzbekistan	1000	UN
VC00	St. Vincent and the Grenadines	1000	UN
VE00	Venezuela	1000	UN
VN00	Vietnam	1000	UN
VU00	Vanuatu	1000	UN
WS00	Samoa	1000	UN
YE00	Yemen	1000	UN
ZA00	South Africa	1000	UN
ZM00	Zambia	1000	UN
ZW00	Zimbabwe	1000	UN

16. Scroll down the list and select the applicable country code. [SCENARIO: US00 United States of America]

17. Click to proceed.

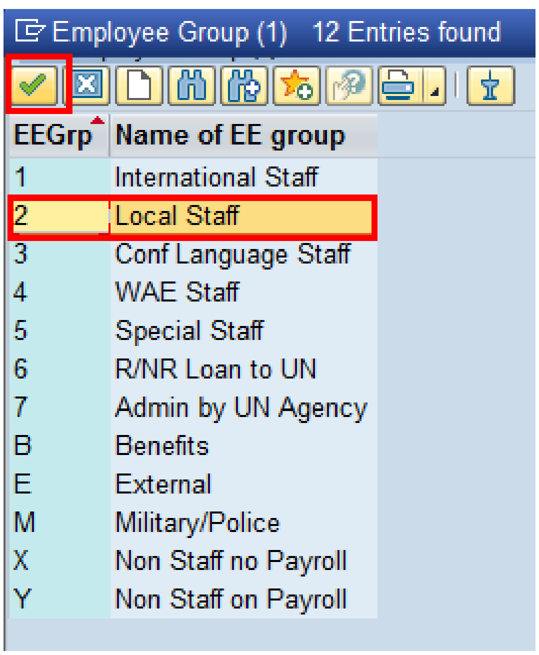
18. Click to select the Personnel subarea. [Scenario: US00]

Staff Due to Receive Long Service Step



19. Click to see the list of employee group codes.

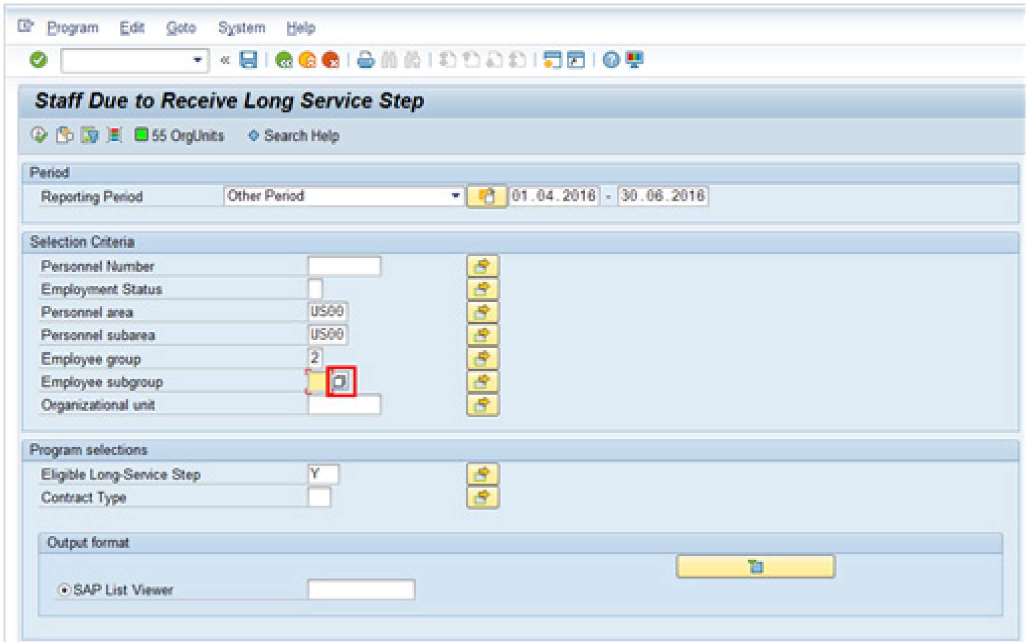
Employee Group (1) 12 Entries found



20. Select the Employee Group. [SCENARIO: Local Staff]

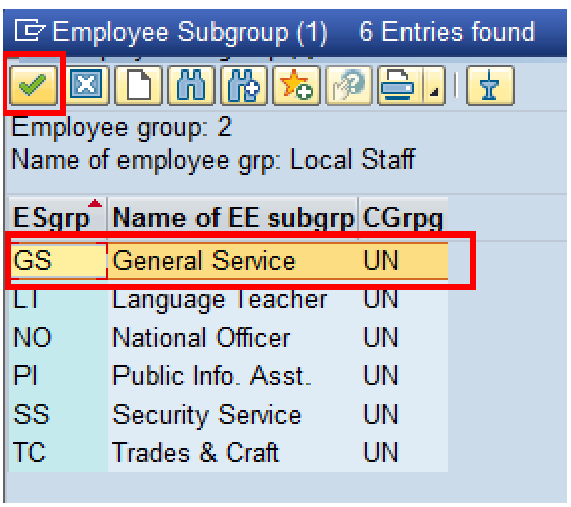
21. Click to confirm your selection.

Staff Due to Receive Long Service Step



22. Click to see the list of employee subgroup codes.

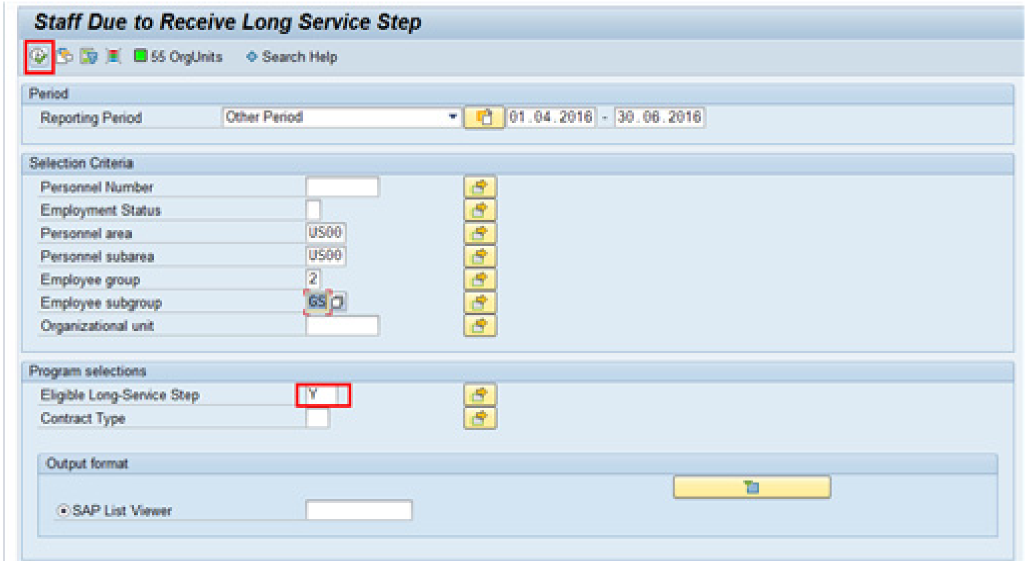
Employee Subgroup (1) 6 Entries found



23. Select the applicable Employee Subgroup. [SCENARIO: GS General Service]

24. Click to proceed.

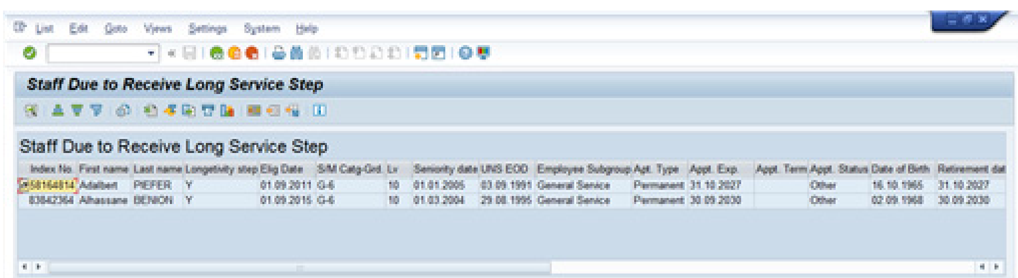
Staff Due to Receive Long Service Step



25. Click  to run the report.

Eligible Long-Service Step is defaulted to Y (YES). This means that the system will pick those staff members who meet the eligibility criteria.

Staff Due to Receive Long Service Step

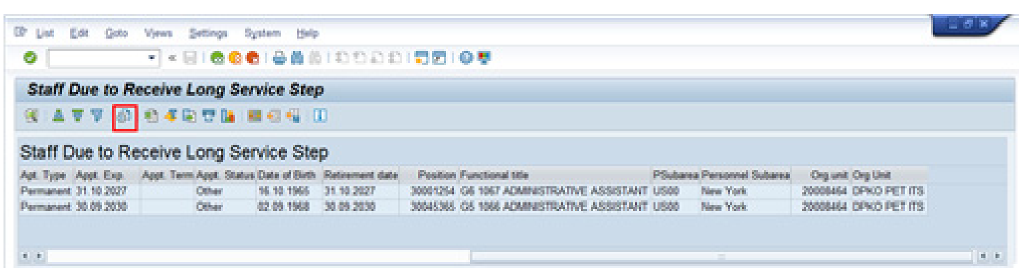


26. Review the eligibility date reflected. The eligibility date is the effective date of the grant of the long-service step. Kindly make sure that the staff member has at least twenty continuous or cumulative years of service and has served five years at the top step of the current grade. Kindly ensure that the staff member meets the criteria for granting the long-service step.

A report is generated with a list of staff members who are eligible to receive long service step increment. The generated report has the following information:

- Staff member's index number - displays the staff member's Personnel No.
- Name - two columns displaying the staff member's first and last name.
- Longevity step eligibility - displays whether the staff member is eligible for the Longevity step, Y - YES and N - NO.
- Eligibility date - displays the date the staff member will become eligible for the Longevity step.
- Category, grade - displays the staff member's category and grade .
- Lv - displays the staff member's level.
- UNS EOD - displays the staff member's Entry of Duty in the UN Secretariat.
- Employee subgroup - displays the staff member's Subgroup type, e.g. General Service.
- Appointment type - displays the staff member's appointment type, e.g. Permanent, Fixed-Term, etc.
- Appointment expiration date - displays the date the staff member's appointment will expire.
- Appointment termination date - displays the date the staff member's appointment will expire.
- Appointment status - displays the staff member's type of appointment, (Language, Geographical, etc.)
- Date of birth - displays the staff members date of birth.
- Retirement date - displays the date of the staff member's mandatory age of separation.

Staff Due to Receive Long Service Step



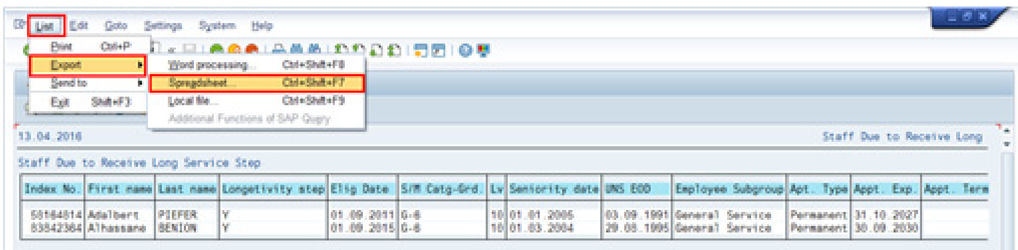
27. Click to scroll to the right and see the remaining columns.

The remaining columns are:

- Position - displays the position number.
- Functional title - displays the staff member's functional title.
- Personnel area and subarea - two columns that display the staff member's personnel area and subarea.
- Organizational unit - displays the staff members organizational unit.

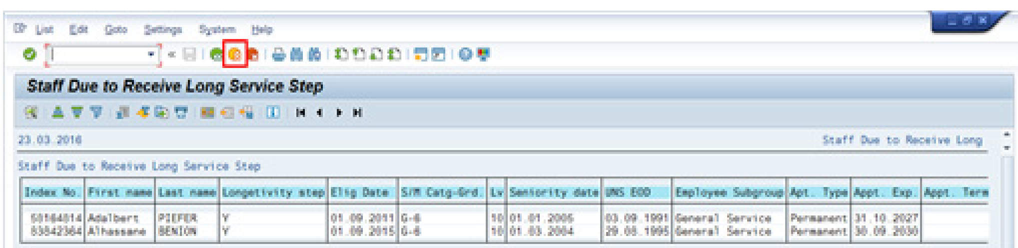
28. Click to print preview.

Staff Due to Receive Long Service Step



29. You can save this report as an excel file by clicking List➔ Export➔ Spreadsheet and follow the on screen instructions to save the spreadsheet.

Staff Due to Receive Long Service Step



30. Click to return to the SAP Easy Access screen.

3.3 Entitlements

Use the following procedures to run a(n):

- 3.3.1 Dependants Report
- 3.3.2 Education Grant Advance Recovery
- 3.3.3 Rental Subsidy Monitoring Report

3.3.1 Dependants Report

This report can be used to generate a list of staff members who have children who:

- **will turn 18** by a given date
- **will turn 21** by a given date
- are in receipt of a **Government Grant**
- are **Disabled**
- are in full-time **Educational Attendance**
- are **Financially Dependant**, or
- any combination of the above.

Scenario

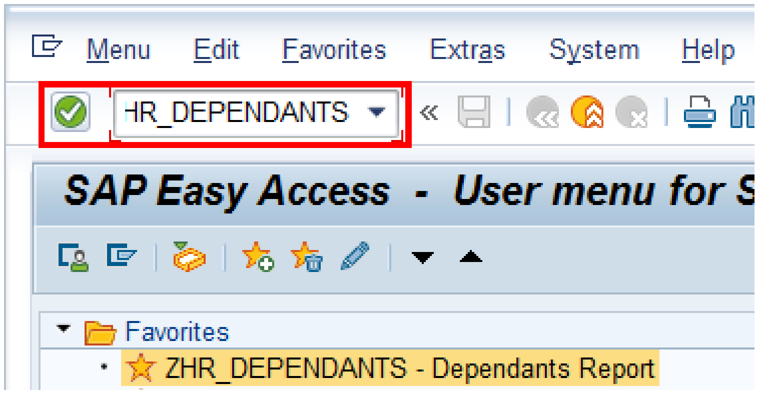
The HR Partner runs a report to identify the children who will turn 21 in the next month (01.04.2016). For each child on this list, a personnel action must be executed to discontinue the dependency benefit.

Even though the Umoja will stop making payments for children at age 21, the HR Partner must monitor these cases to ensure that the discontinuation of dependency PA is executed

Procedure

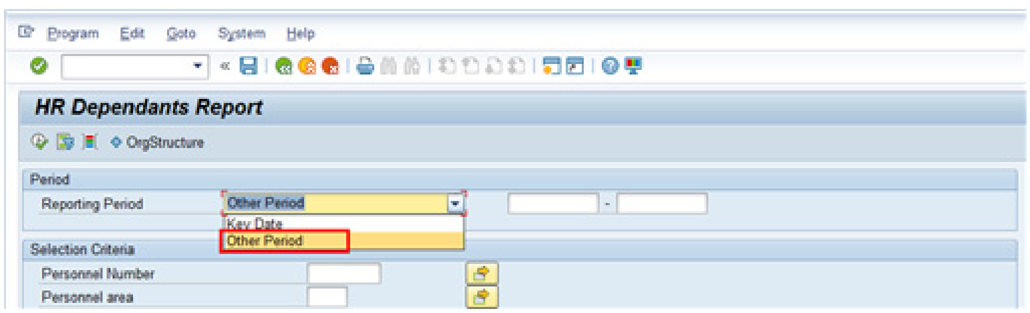
1. Start the transaction using the menu path or transaction code.

SAP Easy Access - User menu for Sheryl Ann Medina



2. Click after typing ZHR_DEPENDANTS in the command text box.

HR Dependants Report

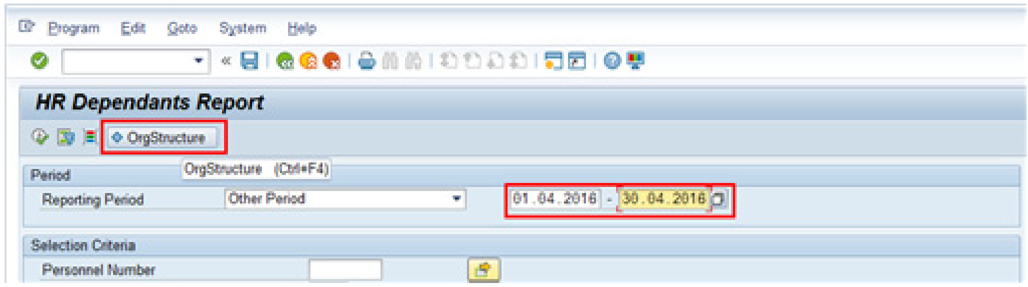


3. From the Reporting Period dropdown, select the period for which you want to run the report. [SCENARIO: Other Period].

Reporting Period options are:

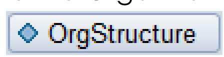
- **Key Date**: used to filter the records by the date you entered. For example, if you enter 01.04.2016 as the key date and select Children Turning 18 under Selection Options, the system will display children who are turning 18 years of age on 01.04.2016.
- **Other Period**: used to filter the records by the date range you entered. For example, if you enter 01.04.2016 - 30.04.2016 and select Children Turning 21 under Selection Options, the system will display the children who are turning 21 years of age between 01.04.2016 through 30.06.2016.

HR Dependants Report



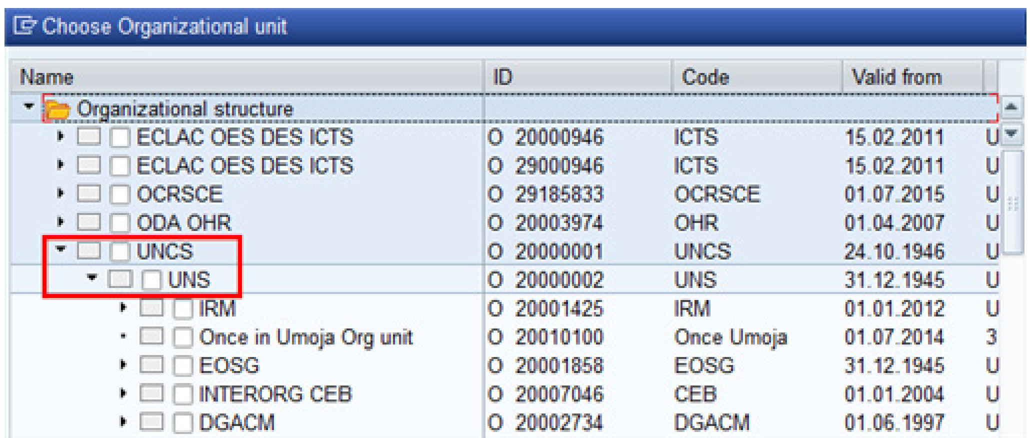
4. Enter a date range. [Scenario: start date: 01.04.2016 and end date: 30.04.2016]

5. Locate the Organizational Structure that you want to run a report.

Click 

to display the list of organizational units.

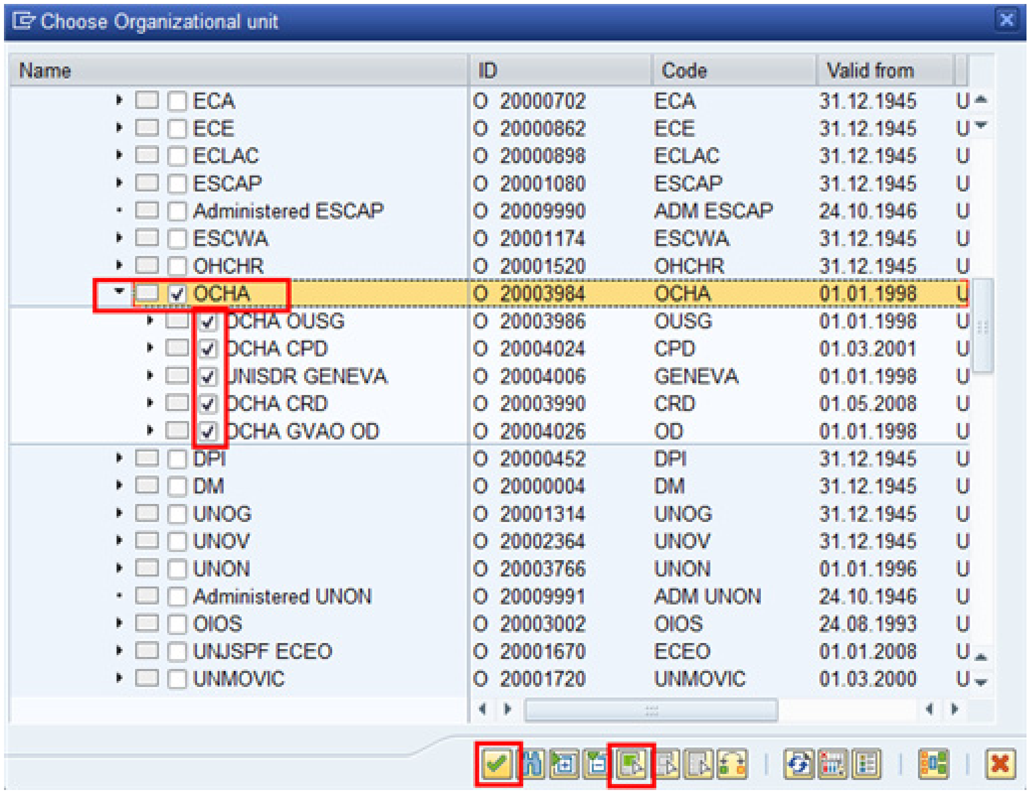
Choose Organizational unit



6. Locate the organizational unit. [Scenario: UNCS O 20000001]

Locate the department, mission or office that you want to run a report. Click  to expand and view the Sub-Organizational Units. [Scenario: UNS]

Choose Organizational unit



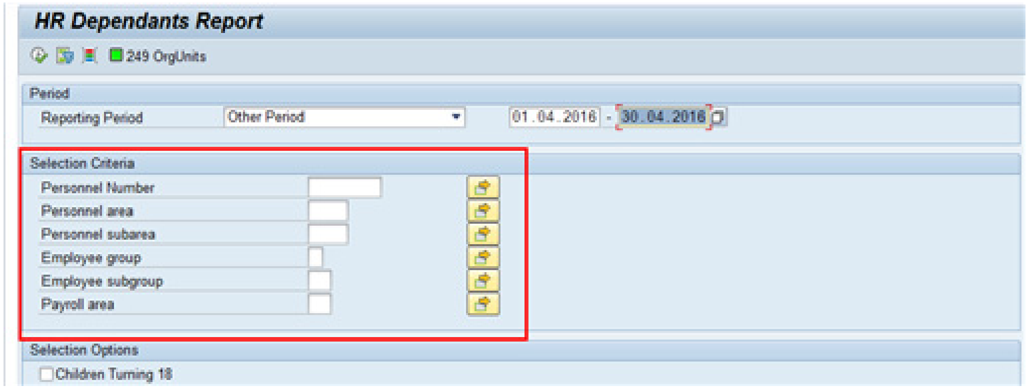
7. Select the department by placing a checkmark next to its name. [Scenario: OCHA]

8. Click to display the offices associated with the selected department.

9. Select the offices you want to run a report for. If you want to run a report for all the offices click  to select ALL offices. However, you may also just click on one office or more.

10. Click  to proceed.

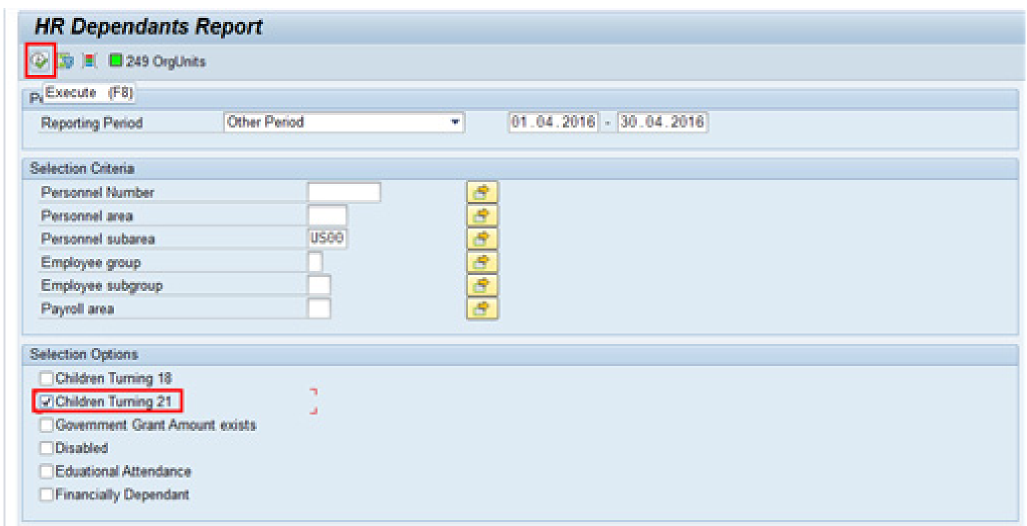
HR Dependants Report



11. Select one or more Selection Criteria, if you do not see the parameters you want, click  or press F2 on your keyboard.

In this scenario, we will not add any additional Selection Criteria.

HR Dependants Report



12. Select one or more Selection Options. For example, you can also click on a combination of options. For example, you can select children turning 21 who are financially dependant or in full educational attendance. [Scenario: Children Turning 21]

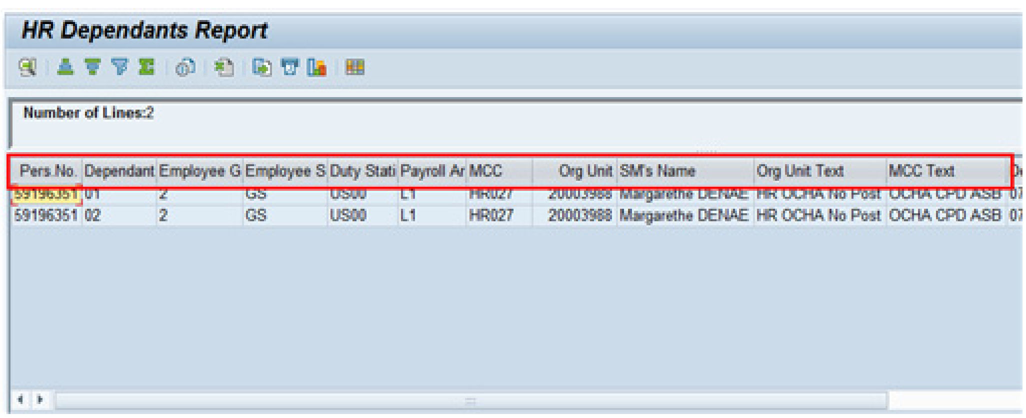
Selection Options are:

- **Children Turning 18**- used to display children who will turn 18.
- **Children Turning 21**- used to display children who will turn age 21.
- **Government Grant Amount exists**- used to display children who are in receipt of government assistance.
- **Disabled**- used to display children recorded as disabled in the system.
- **Educational Attendance** - used to display children who are in full-time school attendance.
- **Financially Dependant** - used to display children who are financially dependent.

13. Click to run the report.

In this scenario we will run a report to see a list of staff members with children turning age 21 as of the data selection period entered. As you can see the child/ren turned 21 on 07.04.2016. Please note that though the system automatically stops the payment of the dependency allowance when the child turns 21, it is the HR Partner's responsibility to run this report, review the list and take the appropriate action to reflect the discontinuance of dependency allowance in the system.

HR Dependants Report


HR Dependants Report

Number of Lines:2

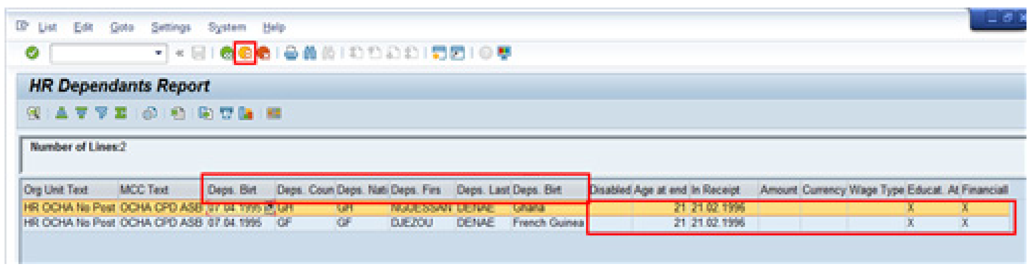
Pers.No.	Dependant	Employee G	Employee S	Duty Stati	Payroll Ar	MCC	Org Unit	SM's Name	Org Unit Text	MCC Text
59196351	01	2	GS	US00	L1	HR027	20003988	Margarethe DENAE	HR OCHA No Post	OCHA CPD ASB
59196351	02	2	GS	US00	L1	HR027	20003988	Margarethe DENAE	HR OCHA No Post	OCHA CPD ASB

14. The first 11 columns contain staff member information such as their Personnel No., Name, Duty Station, etc. The second column indicates the number of dependents that meet the selected criteria. Each dependent will appear on a separate line. In the example above, the staff member has two dependent children that will be turning 21 and it is indicated in the Dependant column (column #2) by the numbers 01 and 02.

Scroll through the list to locate the staff member.

15. Click to scroll to the right and see the remaining columns.

HR Dependants Report



16. The next six (6) columns provide general information about the dependant such as their name, date of birth, country of birth, etc.

Locate the dependant information.

The last eight (8) columns provide detailed information about the dependant. These are the fields that should be reviewed by the HR Partner when conducting the review. Since we did not indicate any other selection criteria other than children over the age of 21, we see all possible scenarios with respect to the disabled, educational attendance and financially dependent information.

- **Disabled** - an "X" will appear in this column for child/ren recognized by Medical Services as disabled.
- **Age at end of Period** - the age that the child/ren will be at the end of the selected period appears in this column.
- **In Receipt of Allowance Since** - the date the staff member started receiving the allowance for the child/ren.
- **Amount, Currency, and Wage Type** - If the child is in receipt of government assistance, the amount and currency in which the government assistance is paid, and the wage type (1430/ Gov't Assistance for Child, or 1431 AT (Austria) Assistance for Child) will be shown in these columns.
- **Education Attendance** - if an "X" appears in this column if the child is in full-time educational attendance. If the field is blank, it means that the staff member will stop receiving dependency allowance in respect of that child as soon as the child turns 18. This column should appear checked only if the child is between the ages of 18 and 21.
- **Financially Dependent** - an "X" will appear in thiscolumn if the child is financially dependent.

Please be reminded that for children between ages 18-21, the financially dependent and educational attendance indicators must be both selected in IT0021 in order for the staff member to receive the dependency allowance.

For children in this age range, and upon receipt of the certificate of full-time school attendance from the staff member, the HR Partner has to modify the child's record in IT0021 if they continue to be eligible for dependency.

17. In our scenario, the HR Partner will use this list to execute the PAs for those children who are not disabled and need to have dependency discontinued.

Click  to return to SAP Easy Access screen.

3.3.2 Education Grant Advance Recovery

Use this procedure to generate a list of staff members with education grant advances scheduled for recovery.

It is essential that this report is run every month to identify the staff members that will have EG recoveries in the next payroll. This allows you to review this list against applications that have been received and identify those that need to have the recovery postponed.

> **Note:** This report returns a list of all EG advances scheduled for recovery in a specified time period. This list will include EG advances which have already been settled during the time period selected. An enhancement is currently under development to allow the possibility of excluding these records. Until this is in production, you must verify the status of the EG Settlement in infotype IT0965.

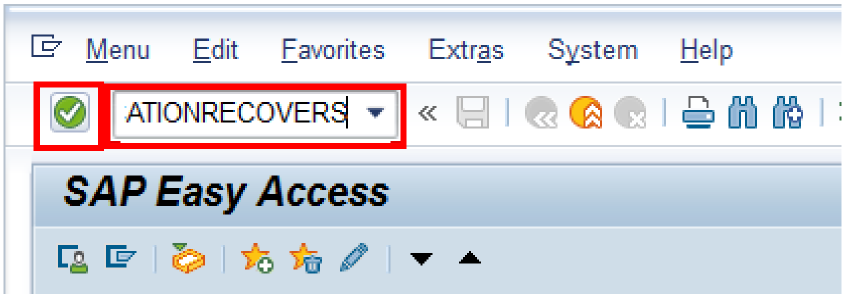
Scenario

The HR Partner needs to run a report listing DPKO staff members stationed in New York with education grant advances due for recovery during the period 1 September through 30 September 2016.

Procedure

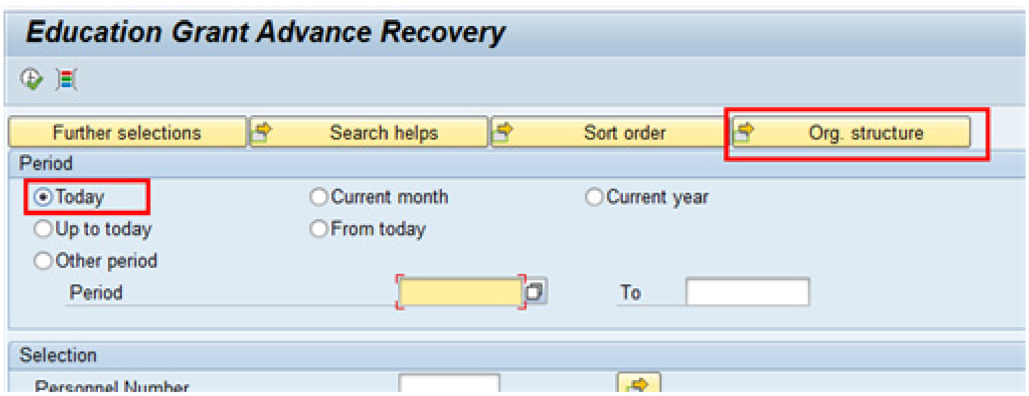
1. Start the transaction using the menu path or transaction code.

SAP Easy Access



2. Click after typing ZPAEDUCATIONRECOVERS in the command text box.

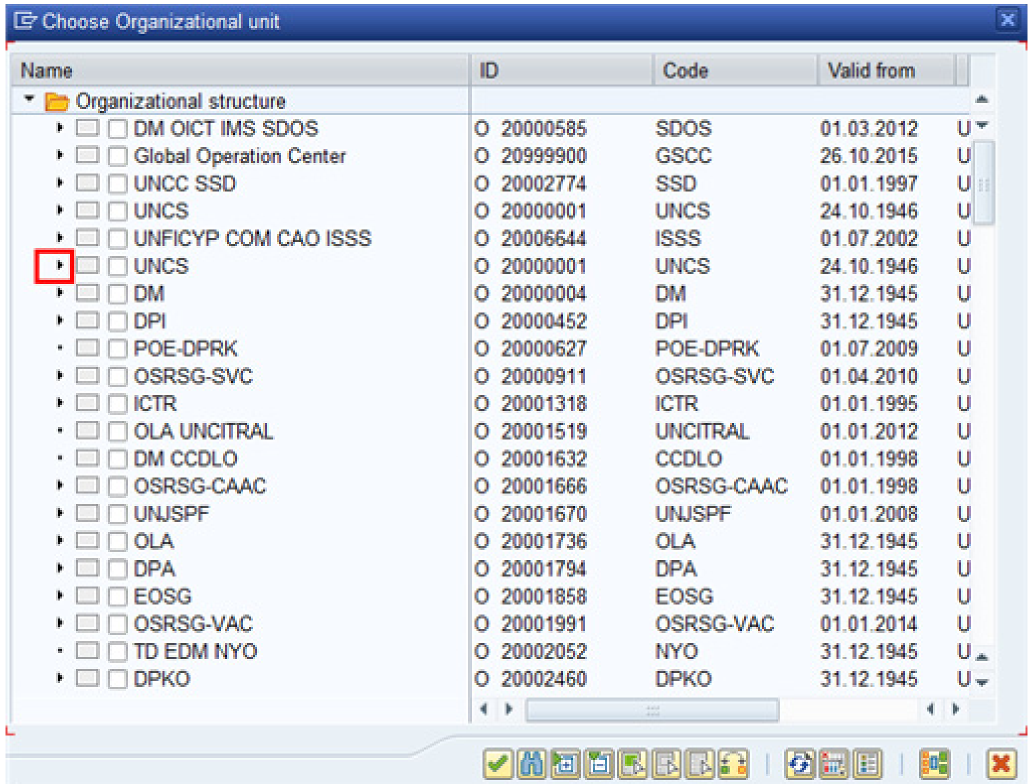
Education Grant Advance Recovery



3. In the Period section, select the period for which you want to run the report. [Scenario: Today]

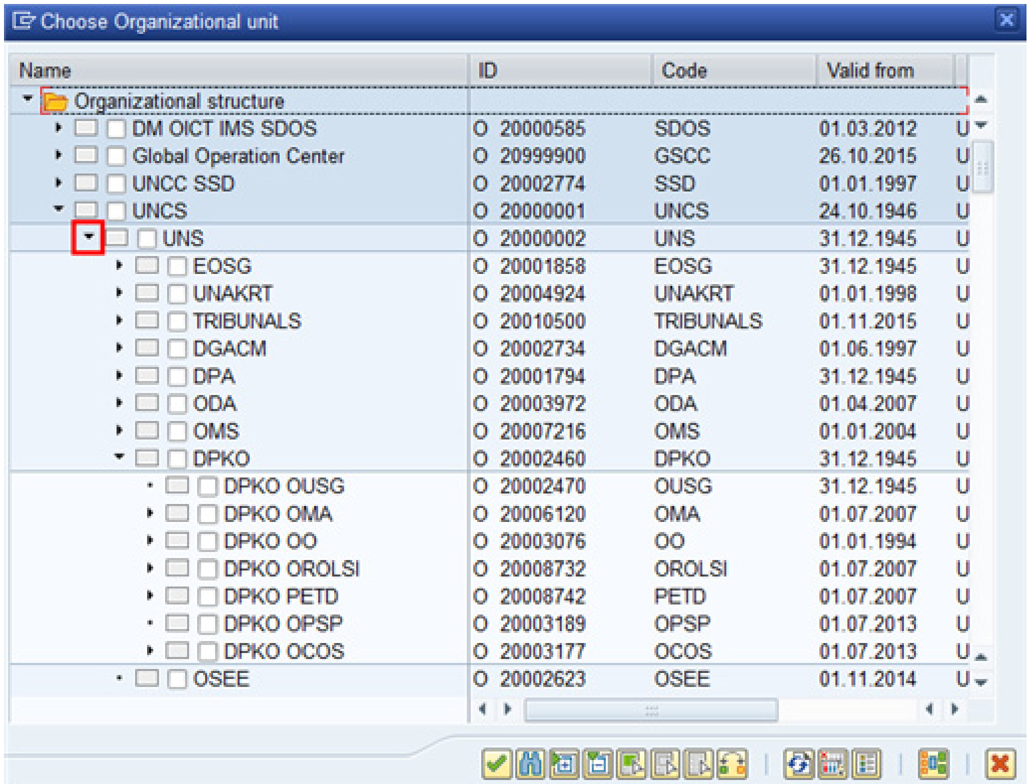
4. Click Org. structure to see the list of organizational units.

Choose Organizational unit



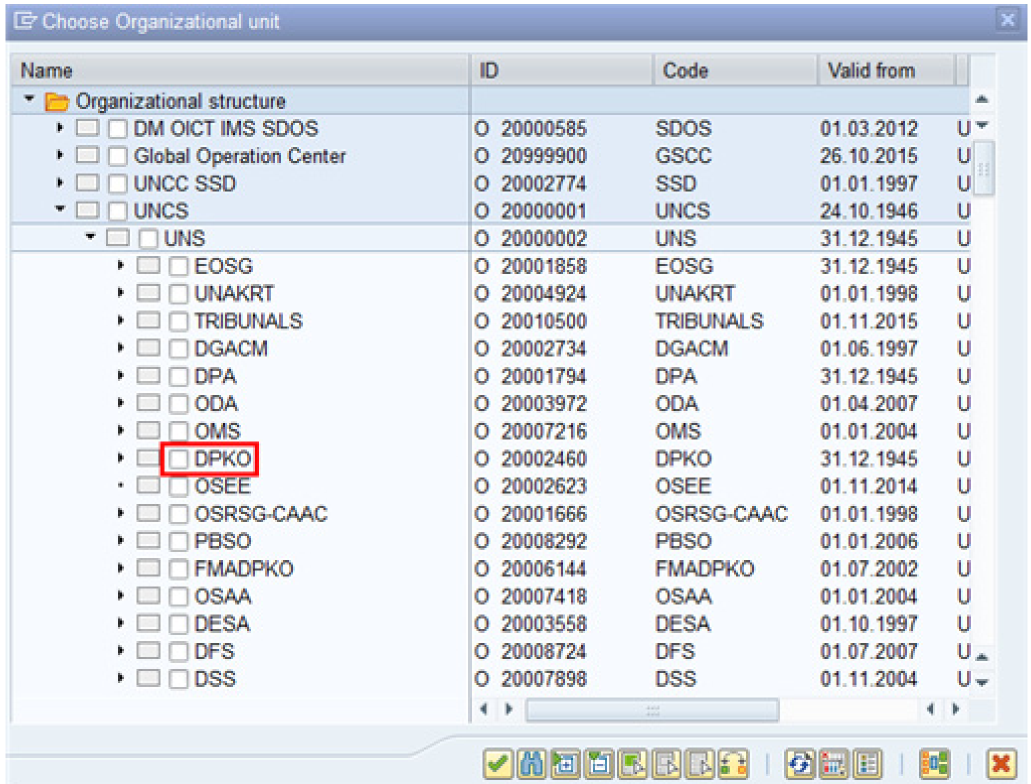
5. Under the Organizational structure folder, go through the list and search for the department, mission or office that you want to run a report for. Click to expand or view the sub org units. [Scenario: UNCS]

Choose Organizational unit



6. Click ▾ to see the offices under the selected department.

Choose Organizational unit

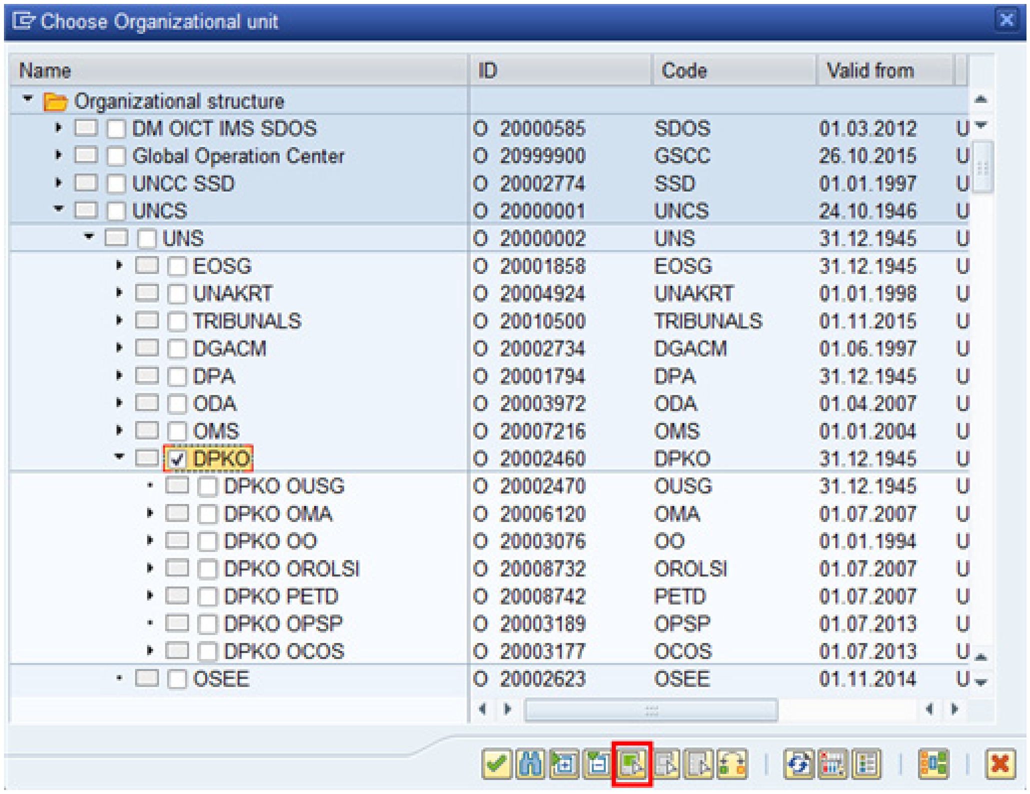


Choose Organizational unit

Name	ID	Code	Valid from	
Organizational structure				
DM OICT IMS SDOS	O 20000585	SDOS	01.03.2012	U
Global Operation Center	O 20999900	GSCC	26.10.2015	U
UNCC SSD	O 20002774	SSD	01.01.1997	U
UNCS	O 20000001	UNCS	24.10.1946	U
UNS	O 20000002	UNS	31.12.1945	U
EOSG	O 20001858	EOSG	31.12.1945	U
UNAKRT	O 20004924	UNAKRT	01.01.1998	U
TRIBUNALS	O 20010500	TRIBUNALS	01.11.2015	U
DGACM	O 20002734	DGACM	01.06.1997	U
DPA	O 20001794	DPA	31.12.1945	U
ODA	O 20003972	ODA	01.04.2007	U
OMS	O 20007216	OMS	01.01.2004	U
DPKO	O 20002460	DPKO	31.12.1945	U
OSEE	O 20002623	OSEE	01.11.2014	U
OSRSG-CAAC	O 20001666	OSRSG-CAAC	01.01.1998	U
PBSO	O 20008292	PBSO	01.01.2006	U
FMADPKO	O 20006144	FMADPKO	01.07.2002	U
OSAA	O 20007418	OSAA	01.01.2004	U
DESA	O 20003558	DESA	01.10.1997	U
DFS	O 20008724	DFS	01.07.2007	U
DSS	O 20007898	DSS	01.11.2004	U

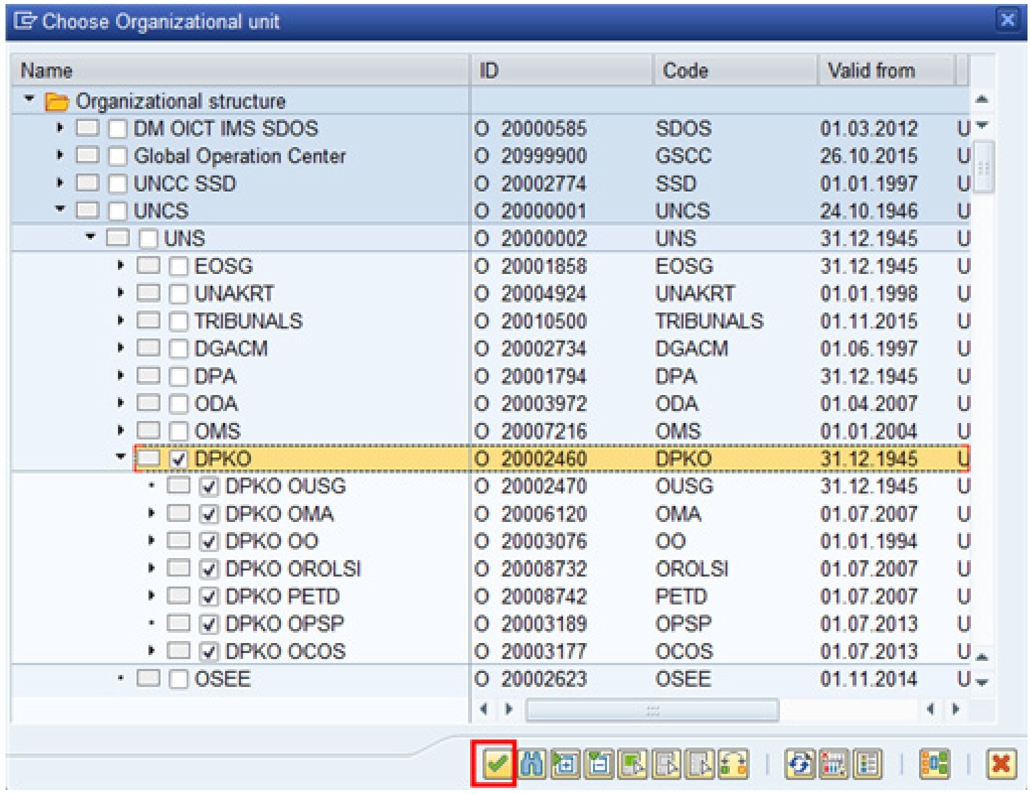
7. Scroll through the list and select the department that you are looking for. Click to select. [SCENARIO: DPKO]

Choose Organizational unit



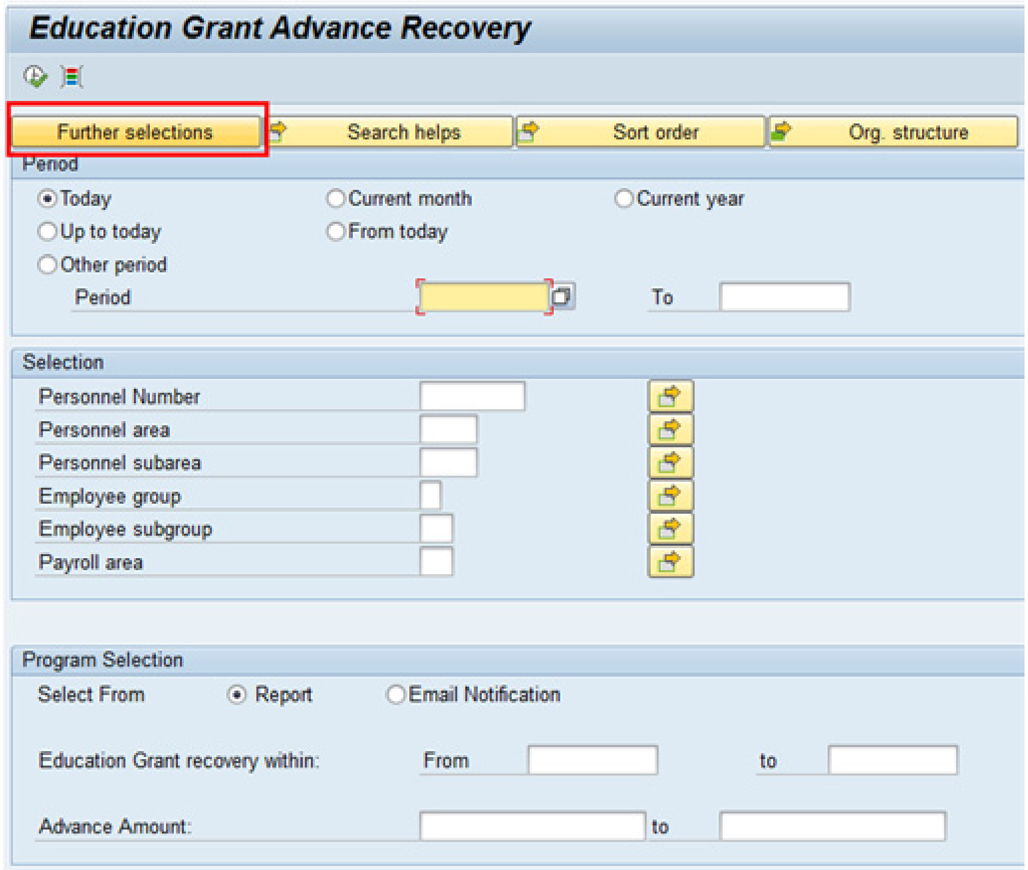
8. You will notice that all the offices under DPKO are unchecked. When you click , offices under the selected department will be checked.

Choose Organizational unit



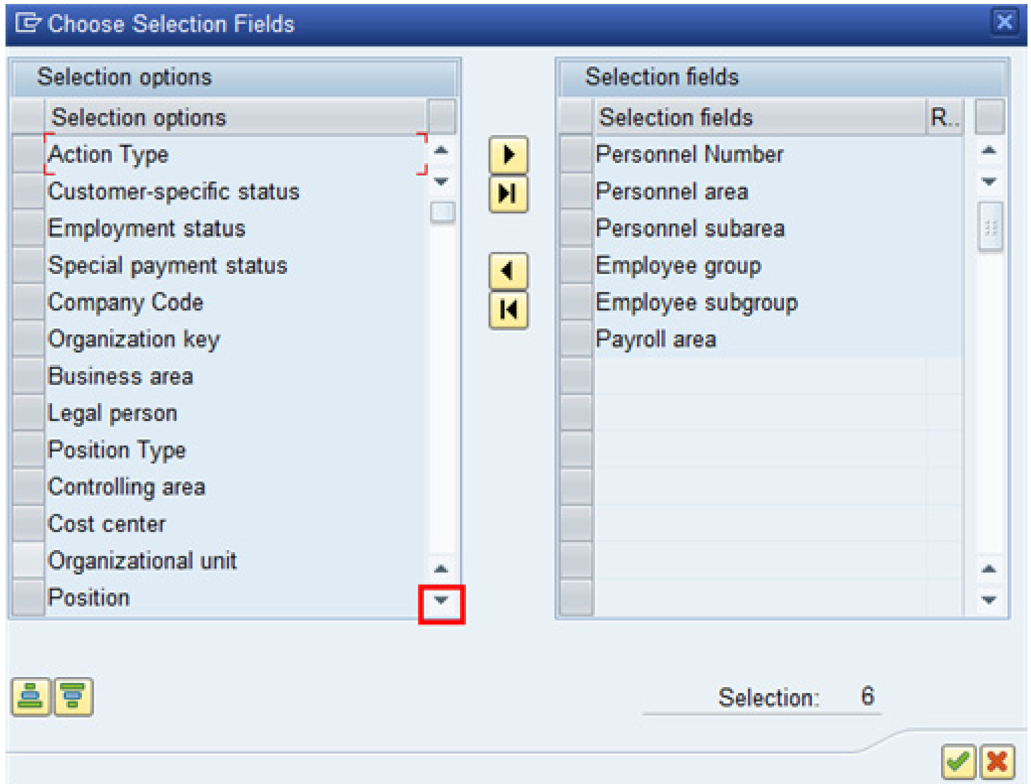
9. Click ✓ to proceed.

Education Grant Advance Recovery



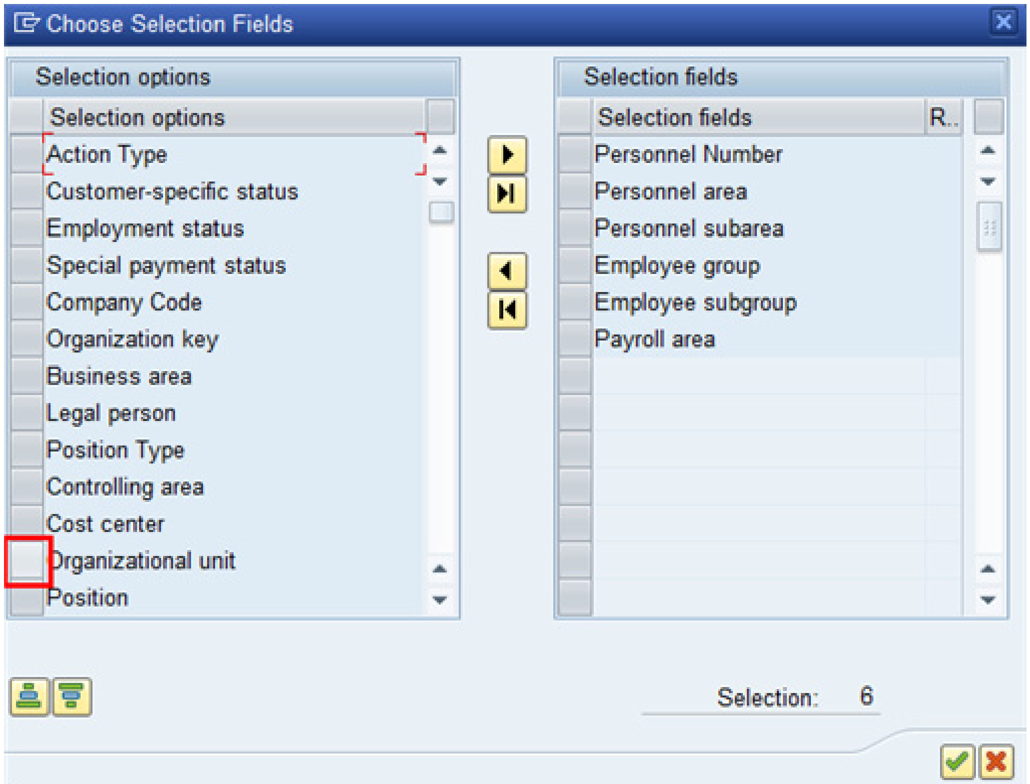
10. If you need to use other parameters not shown under the Selection section, click Further selections.

Choose Selection Fields



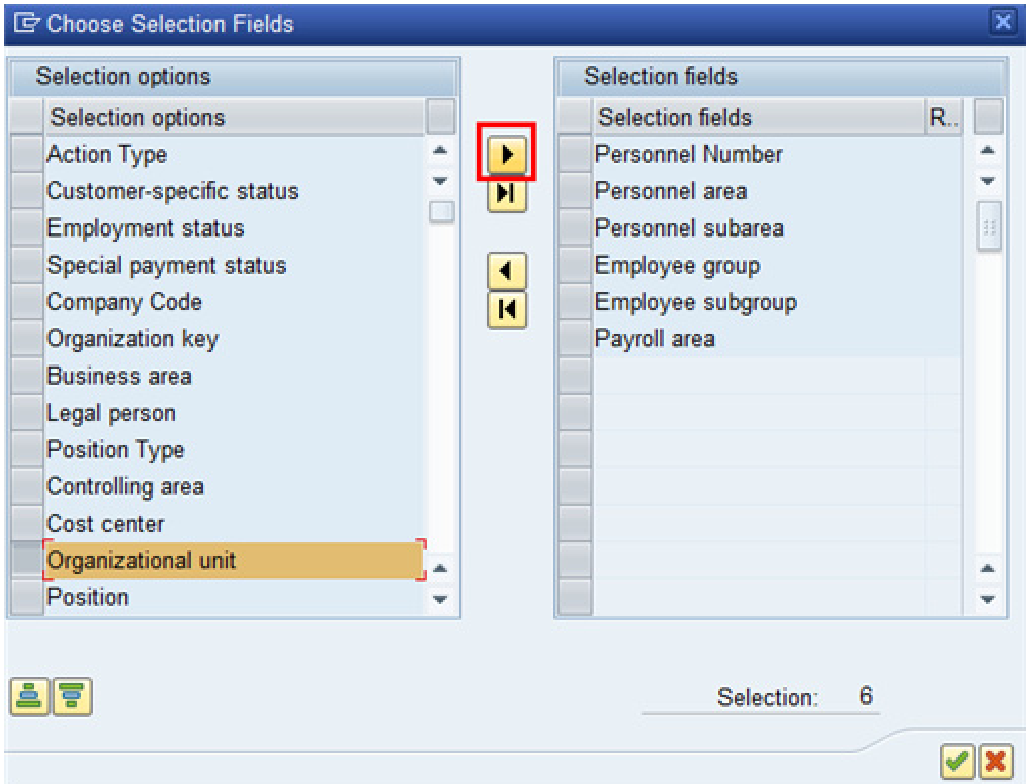
11. Click ▾ to scroll through the list and find the field that you need in running the report.

Choose Selection Fields



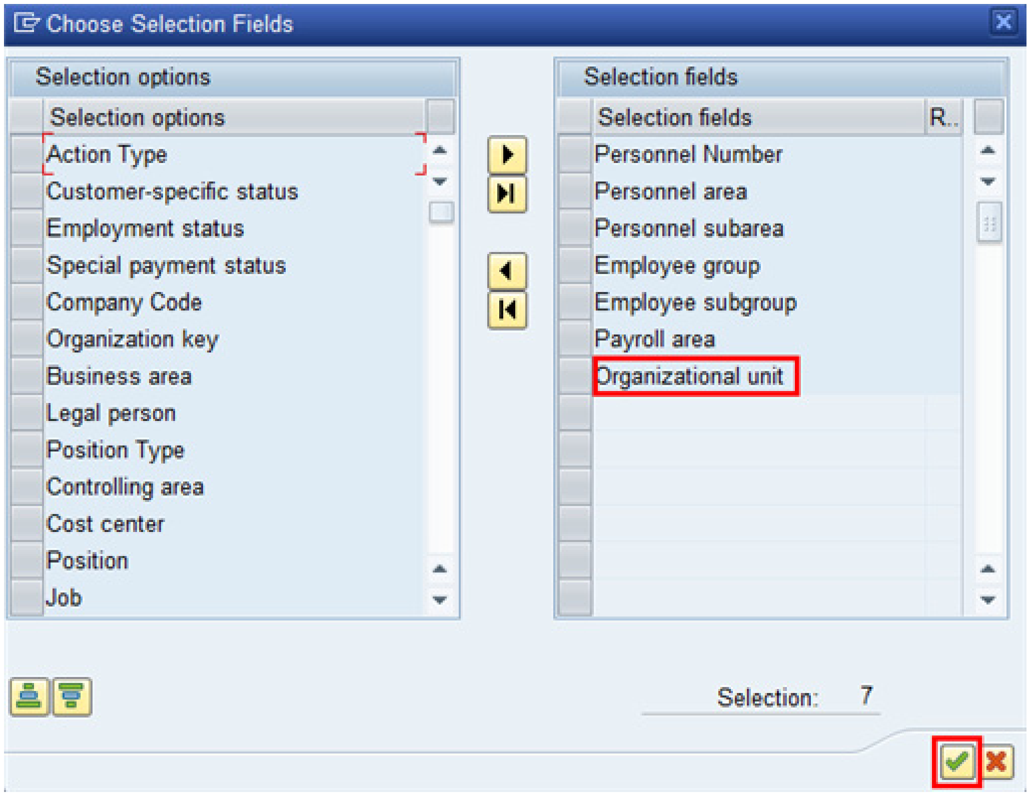
12. Click to select the field that you want to use. [Scenario: Organizational unit]

Choose Selection Fields



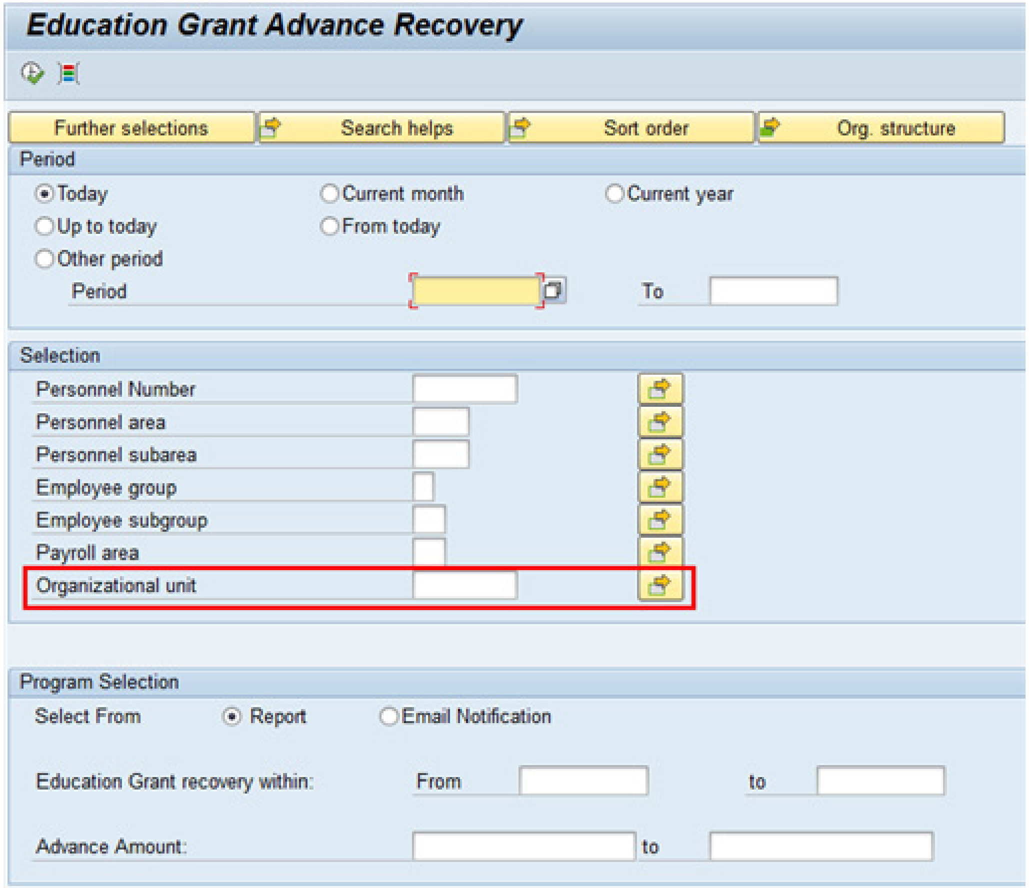
13. Click  to move the selected field to the Selection fields section.

Choose Selection Fields



14. You will notice that the field you selected [Scenario: Organizational unit] is now listed under the Selection fields section. Click ✔ to continue.

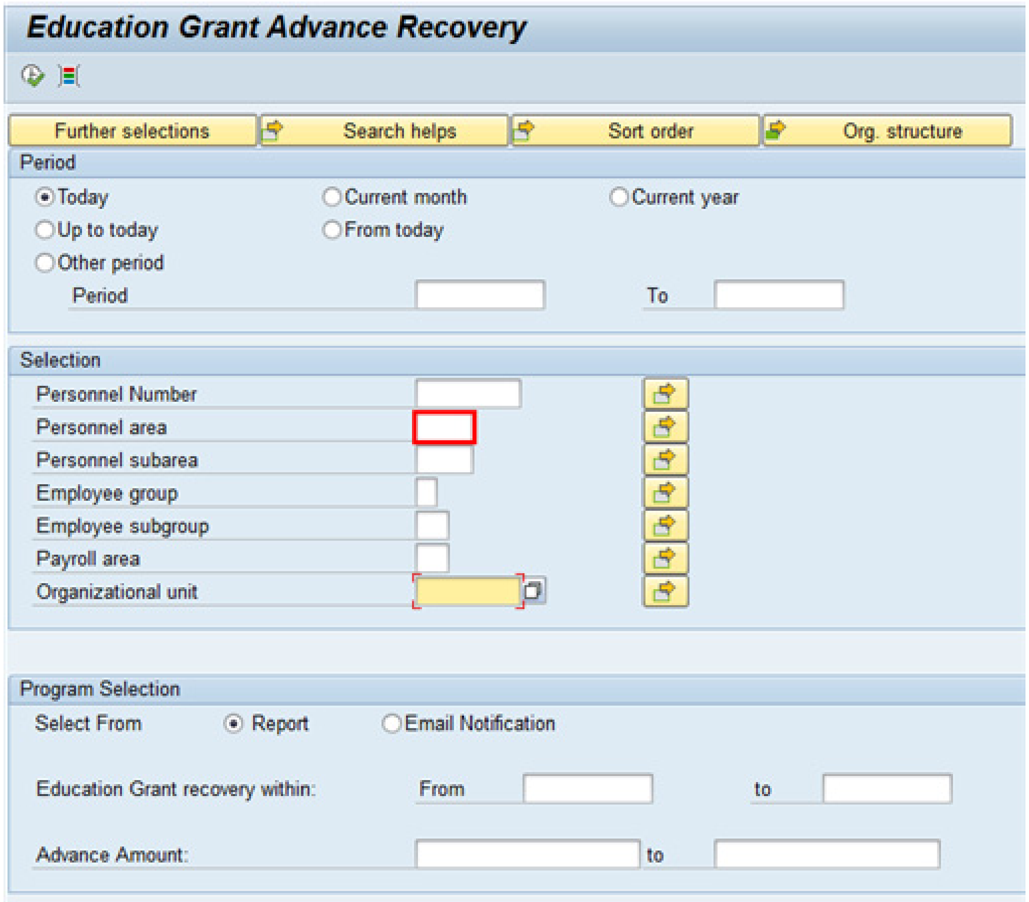
Education Grant Advance Recovery



15. Now you see Organizational unit under the Selection section. If you know the Organizational unit number, enter it in the Organizational unit text box. Otherwise, you may select the department or office as shown previously by clicking the Org. structure button.

For this report, we have already selected a department under the Org Structure folder button, thus, we will not enter a value in the Organizational unit text box.

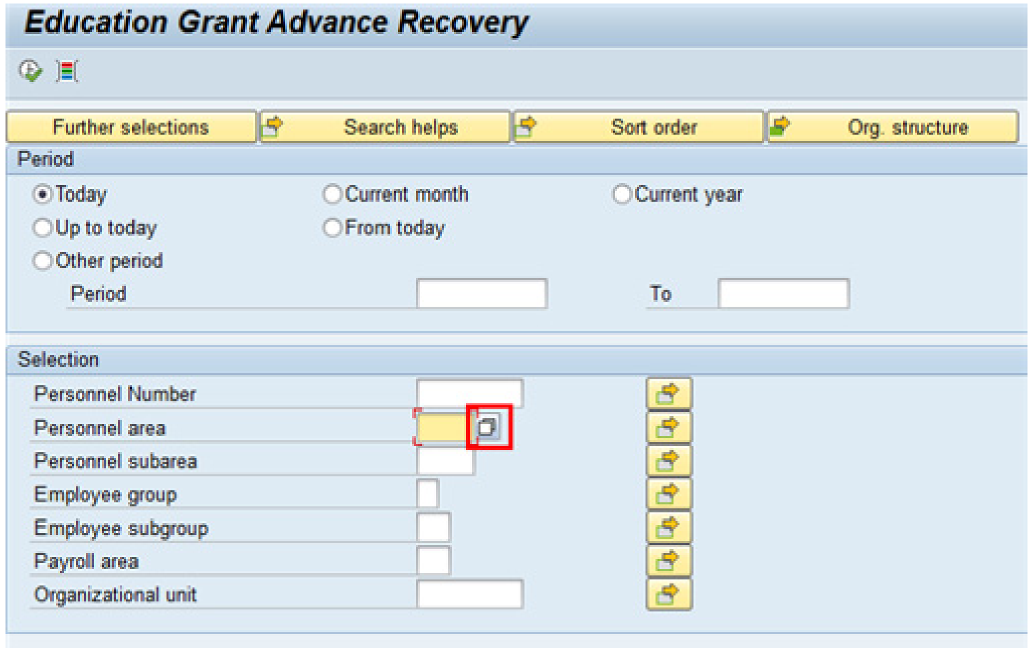
Education Grant Advance Recovery



16. In this scenario, we only wanted to select DPKO staff member from NY so to make the duty station determination, we will specify it using the Personnel Area field.

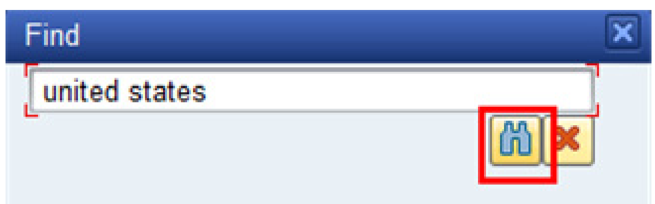
If you know the country code, enter it in the Personnel area text box.

Education Grant Advance Recovery



17. Otherwise, click to see the list of personnel area codes.

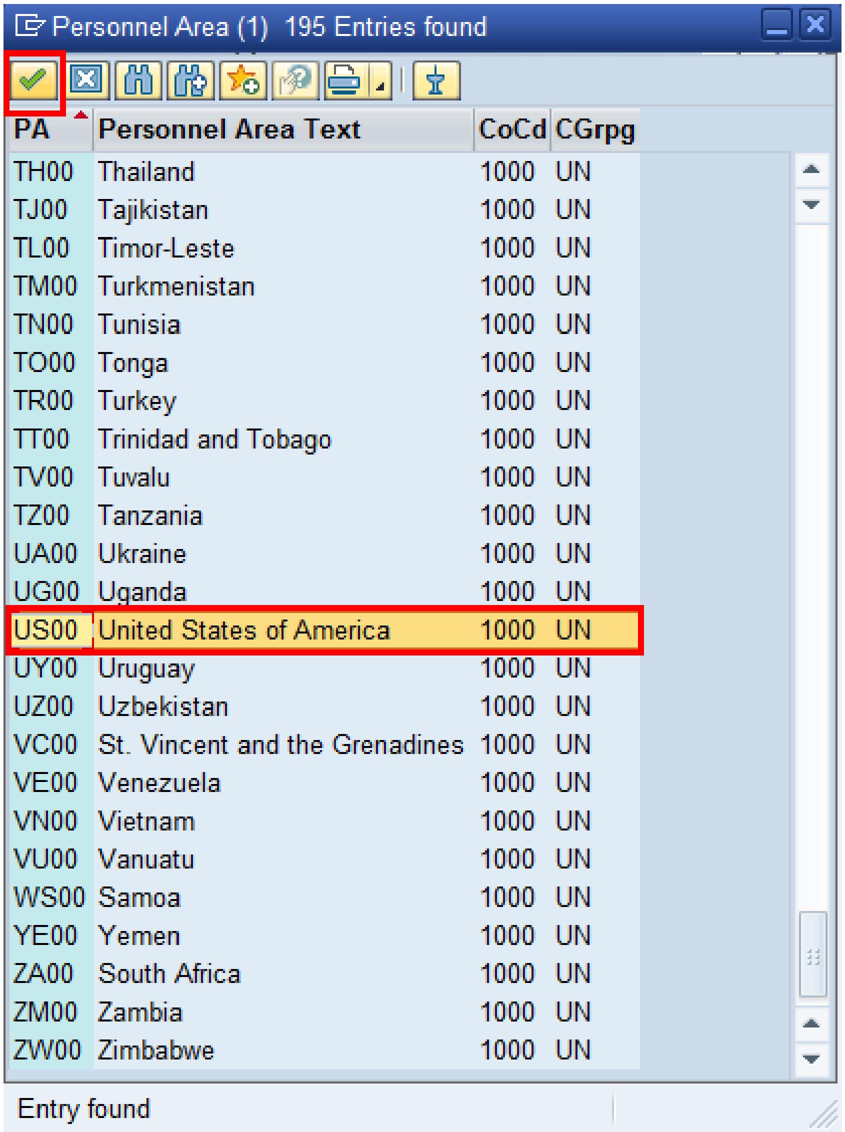
Find



18. Enter the duty station you are looking for in the Find text box. [Scenario: united states]

Click to search.

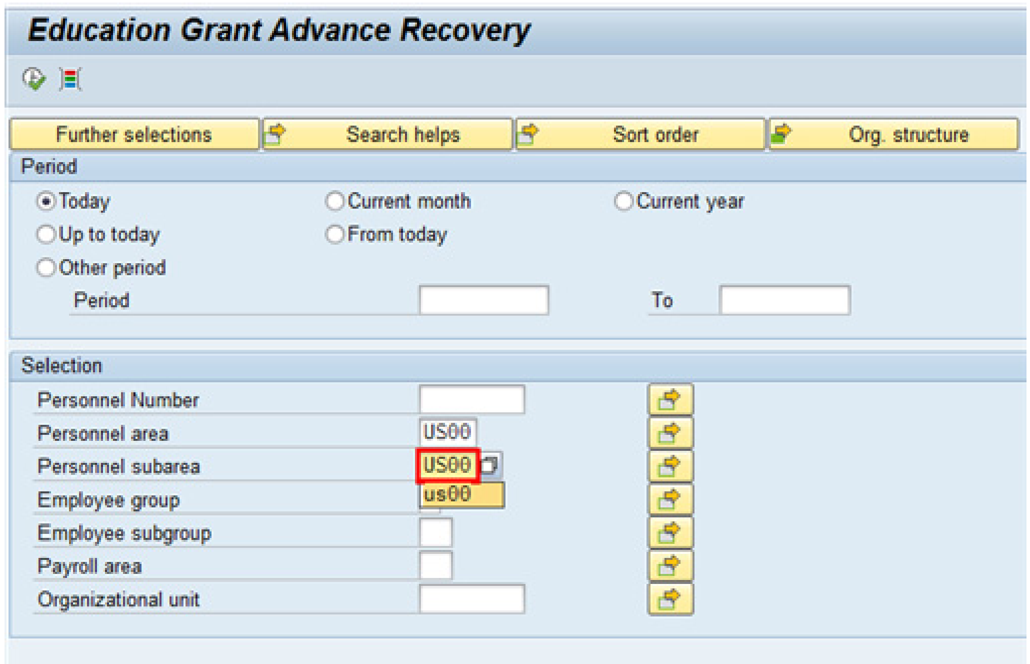
Personnel Area (1) 195 Entries found



19. Select the duty station from the list. [Scenario: US00]

Click to confirm selection.

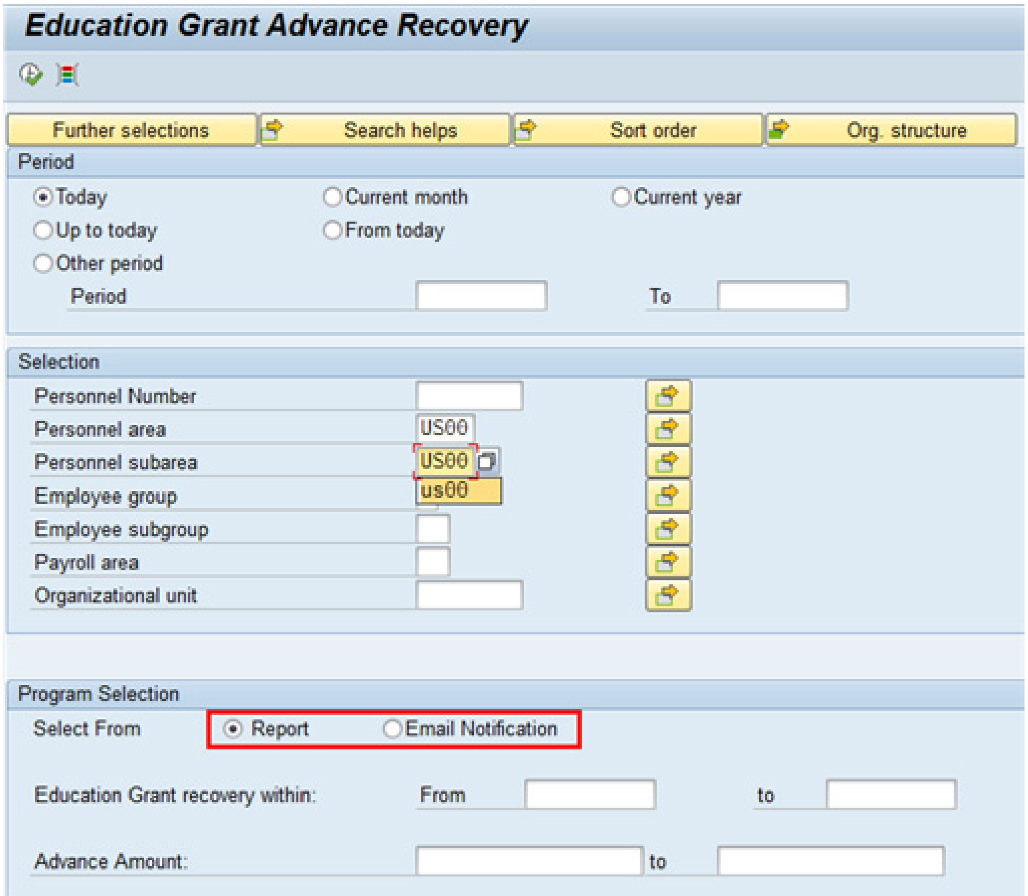
Education Grant Advance Recovery



20. Enter for search for the Personnel subarea. [Scenario: US00]

When executing the Education Grant Advance Recovery Report in Umoja there is a Program Selection criteria section. The first selection criteria in this section is to determine whether the HR Partner will execute a report or send email notifications to staff members who meet the criteria filtered in the report.

Education Grant Advance Recovery



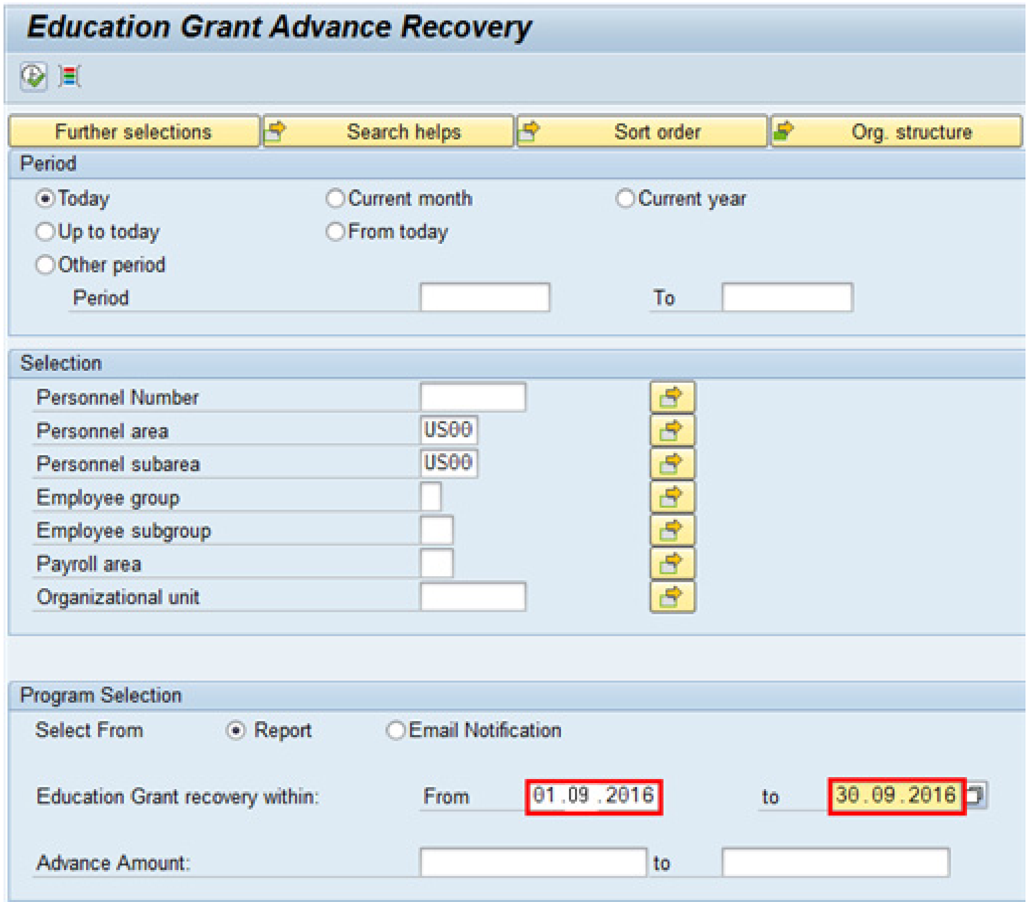
21. You can choose to generate the report, or notify staff members of the recovery date.

◉ Report : This radio button is selected by default when the report is launched. The report, when executed, will return staff member results that meet the criteria the HR Partner has indicated in the report (e.g. staff member in a specific Personnel Area and Subarea, education grants scheduled for recovery within a specific period of time, etc.). This selection should be used to generate reports regarding EG Advance recovery. The reports generated in the system can be exported to Excel for further analysis.

◯ Email Notification : If the radio button for email notification is selected, when the selection criteria are executed, all staff members who meet the criteria that the HR Partner has indicated will receive an email notifying them of the date in which the recovery will take place. This can be a current or future date depending on the criteria selected by the HR Partner. Email notifications should be used to send a notification to an individual staff member (using the Personnel Number selection) or a group of staff members who have an impending education grant advance recovery that requires their immediate attention. As best practice, a report should be executed prior to the email notification selection to determine the number of emails to be sent and to ensure the emails are being sent to the correct individuals.

DO NOT select Email Notification when running this report to obtain a list of upcoming recoveries because, as indicated earlier, generated list will contain all staff members with recovery dates in the period you specified, including those whose claims have been settled (and the settlement date equals recovery date).

Education Grant Advance Recovery

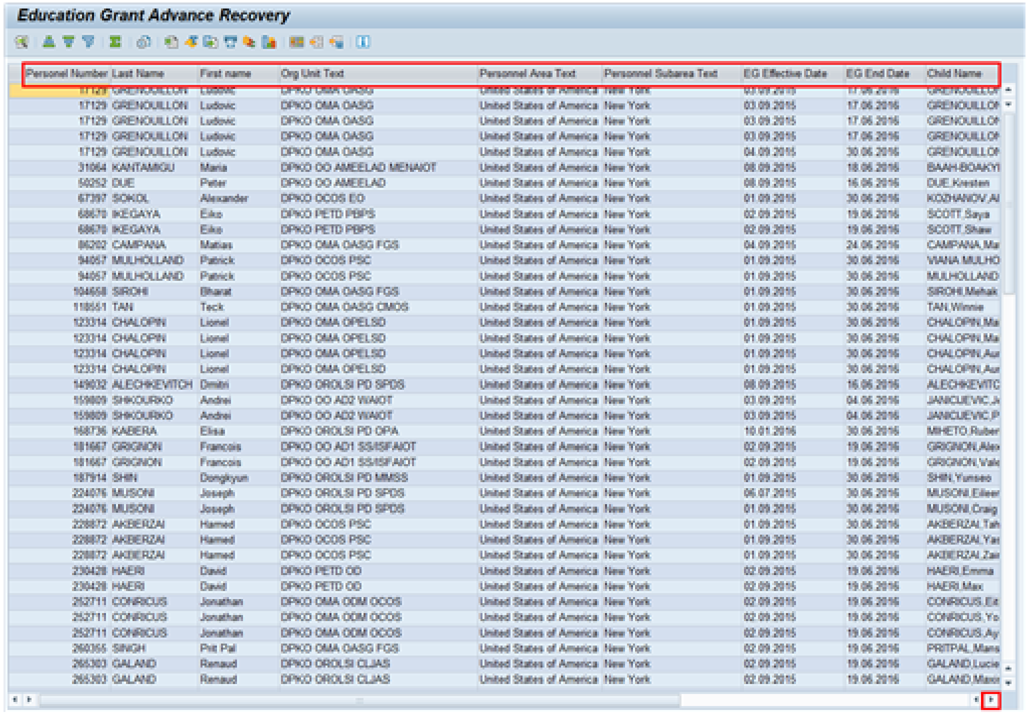


22. You can limit the report results to show records with a recovery date within a specific range.

Enter the beginning of the date range in the From text box [Scenario: 01.09.2016] and the end of the date range in the to text box [Scenario: 30.09.2016]

Click to run the report.

Education Grant Advance Recovery



Education Grant Advance Recovery

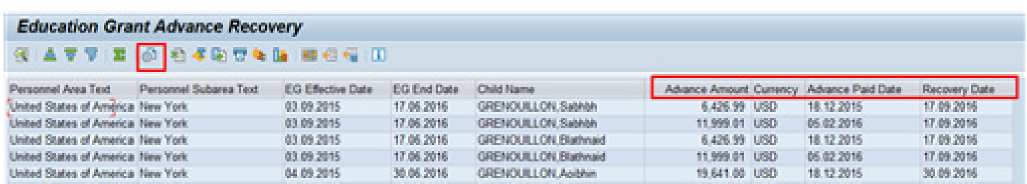
Personel Number	Last Name	First name	Org Unit Text	Personnel Area Text	Personnel Subarea Text	EG Effective Date	EG End Date	Child Name
17129	GRENOUILLON	Ludovic	DPKO OMA OASG	United States of America	New York	03.09.2015	17.06.2016	GRENOUILLON
17129	GRENOUILLON	Ludovic	DPKO OMA OASG	United States of America	New York	03.09.2015	17.06.2016	GRENOUILLON
17129	GRENOUILLON	Ludovic	DPKO OMA OASG	United States of America	New York	03.09.2015	17.06.2016	GRENOUILLON
17129	GRENOUILLON	Ludovic	DPKO OMA OASG	United States of America	New York	03.09.2015	17.06.2016	GRENOUILLON
17129	GRENOUILLON	Ludovic	DPKO OMA OASG	United States of America	New York	04.09.2015	30.06.2016	GRENOUILLON
31064	KANTAMGU	Maria	DPKO OO AMEELAD MENAIOT	United States of America	New York	08.09.2015	18.06.2016	BAAH-BOAKYI
50252	DUE	Peter	DPKO OO AMEELAD	United States of America	New York	08.09.2015	16.06.2016	DUE,Kresten
67397	SOKOL	Alexander	DPKO OCOS EO	United States of America	New York	01.09.2015	30.06.2016	KOZHANOV,Al
68670	IKEGAYA	Eiko	DPKO PETD PBPS	United States of America	New York	02.09.2015	19.06.2016	SCOTT,Saya
68670	IKEGAYA	Eiko	DPKO PETD PBPS	United States of America	New York	02.09.2015	19.06.2016	SCOTT,Shaw
86202	CAMPANA	Matias	DPKO OMA OASG FGS	United States of America	New York	04.09.2015	24.06.2016	CAMPANA,Ma
94057	MULHOLLAND	Patrick	DPKO OCOS PSC	United States of America	New York	01.09.2015	30.06.2016	VIANA MULHO
94057	MULHOLLAND	Patrick	DPKO OCOS PSC	United States of America	New York	01.09.2015	30.06.2016	MULHOLLAND
104658	SIROHI	Bharat	DPKO OMA OASG FGS	United States of America	New York	01.09.2015	30.06.2016	SIROHI,Mehak
118551	TAN	Teck	DPKO OMA OASG CMOS	United States of America	New York	01.09.2015	30.06.2016	TAN,Winnie
123314	CHALOPIN	Lionel	DPKO OMA OPELSD	United States of America	New York	01.09.2015	30.06.2016	CHALOPIN,Ma
123314	CHALOPIN	Lionel	DPKO OMA OPELSD	United States of America	New York	01.09.2015	30.06.2016	CHALOPIN,Ma
123314	CHALOPIN	Lionel	DPKO OMA OPELSD	United States of America	New York	01.09.2015	30.06.2016	CHALOPIN,Au
123314	CHALOPIN	Lionel	DPKO OMA OPELSD	United States of America	New York	01.09.2015	30.06.2016	CHALOPIN,Au
149032	ALECHKEVITCH	Dmitri	DPKO OROLSI PD SPDS	United States of America	New York	08.09.2015	16.06.2016	ALECHKEVITC
159809	SHKOURKO	Andrei	DPKO OO AD2 WAIOT	United States of America	New York	03.09.2015	04.06.2016	JANICIJEVIC,J
159809	SHKOURKO	Andrei	DPKO OO AD2 WAIOT	United States of America	New York	03.09.2015	04.06.2016	JANICIJEVIC,P
168736	KABERA	Elisa	DPKO OROLSI PD OPA	United States of America	New York	10.01.2016	30.06.2016	MIHETO,Ruber
181667	GRIGNON	Francois	DPKO OO AD1 SS/ISFAIOT	United States of America	New York	02.09.2015	19.06.2016	GRIGNON,Alex
181667	GRIGNON	Francois	DPKO OO AD1 SS/ISFAIOT	United States of America	New York	02.09.2015	19.06.2016	GRIGNON,Vale
187914	SHIN	Dongkyun	DPKO OROLSI PD MMSS	United States of America	New York	01.09.2015	30.06.2016	SHIN,Yunseo
224076	MUSONI	Joseph	DPKO OROLSI PD SPDS	United States of America	New York	06.07.2015	30.06.2016	MUSONI,Eileen
224076	MUSONI	Joseph	DPKO OROLSI PD SPDS	United States of America	New York	01.09.2015	30.06.2016	MUSONI,Craig
228872	AKBERZAI	Hamed	DPKO OCOS PSC	United States of America	New York	01.09.2015	30.06.2016	AKBERZAI,Tah
228872	AKBERZAI	Hamed	DPKO OCOS PSC	United States of America	New York	01.09.2015	30.06.2016	AKBERZAI,Yas
228872	AKBERZAI	Hamed	DPKO OCOS PSC	United States of America	New York	01.09.2015	30.06.2016	AKBERZAI,Zai
230428	HAERI	David	DPKO PETD OD	United States of America	New York	02.09.2015	19.06.2016	HAERI,Emma
230428	HAERI	David	DPKO PETD OD	United States of America	New York	02.09.2015	19.06.2016	HAERI,Max
252711	CONRICUS	Jonathan	DPKO OMA ODM OCOS	United States of America	New York	02.09.2015	19.06.2016	CONRICUS,Ei
252711	CONRICUS	Jonathan	DPKO OMA ODM OCOS	United States of America	New York	02.09.2015	19.06.2016	CONRICUS,Yo
252711	CONRICUS	Jonathan	DPKO OMA ODM OCOS	United States of America	New York	02.09.2015	19.06.2016	CONRICUS,Ay
260355	SINGH	Prit Pal	DPKO OMA OASG FGS	United States of America	New York	02.09.2015	19.06.2016	PRITPAL,Mans
265303	GALAND	Renaud	DPKO OROLSI CLJAS	United States of America	New York	02.09.2015	19.06.2016	GALAND,Lucie
265303	GALAND	Renaud	DPKO OROLSI CLJAS	United States of America	New York	02.09.2015	19.06.2016	GALAND,Maxi

23. The report shows the staff member's personnel number, last and first name, the organizational unit the staff member belongs to, the country and duty station.

EG effective date is the start date of the EG application or the start date of the school year while **EG end date** is the last day of the school year. The report also shows the name of the child.

Click ▸ to see the right portion of the screen.

Education Grant Advance Recovery



Education Grant Advance Recovery

Personnel Area Text	Personnel Subarea Text	EG Effective Date	EG End Date	Child Name	Advance Amount	Currency	Advance Paid Date	Recovery Date
United States of America	New York	03.09.2015	17.06.2016	GRENOUILLON,Sabhbh	6,426.99	USD	18.12.2015	17.09.2016
United States of America	New York	03.09.2015	17.06.2016	GRENOUILLON,Sabhbh	11,999.01	USD	05.02.2016	17.09.2016
United States of America	New York	03.09.2015	17.06.2016	GRENOUILLON,Blathnaid	6,426.99	USD	18.12.2015	17.09.2016
United States of America	New York	03.09.2015	17.06.2016	GRENOUILLON,Blathnaid	11,999.01	USD	05.02.2016	17.09.2016
United States of America	New York	04.09.2015	30.06.2016	GRENOUILLON,Aoibhin	19,641.00	USD	18.12.2015	30.09.2016
United States of America	New York	08.09.2015	18.06.2016	BAAH-BOAKYE,Ethan	24,375.00	USD	01.11.2015	18.09.2016

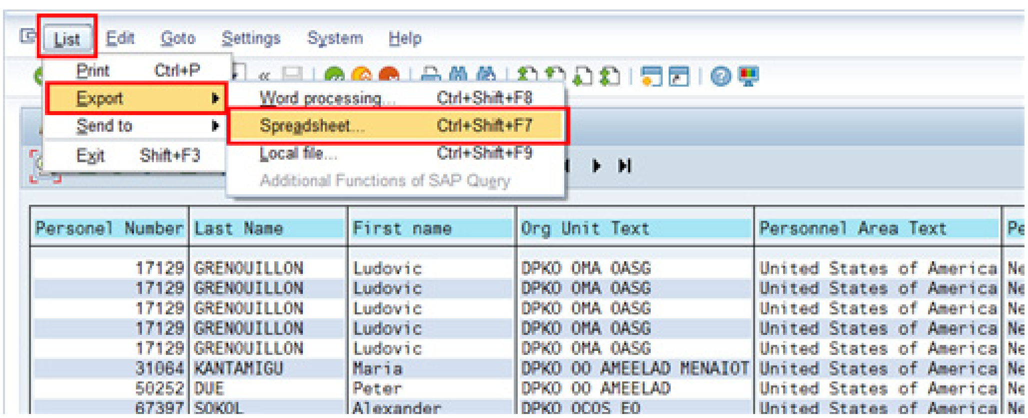
24. The report shows the advance amount received by the staff, when it was paid and the recovery date.

If the HR Partner has received the EG documents and will not be able to process and approve the EG settlement before the scheduled recovery date, the HR Partner has to do a PA30, go to infotype 0965 and delay the recovery date for a month. This will give the HR Partner enough time to process the staff member's EG claim.

Note: This report returns a list of all EG advances scheduled for recovery in the time period you entered above. This list **will** include EG advances which have already been settled. An enhancement is currently under development to allow the possibility of excluding these records. Until this is in production, you must verify the status of the EG Settlement in infotype IT0965.

25. Click  to view the print preview. From the print preview, you can export the report as an Excel file.

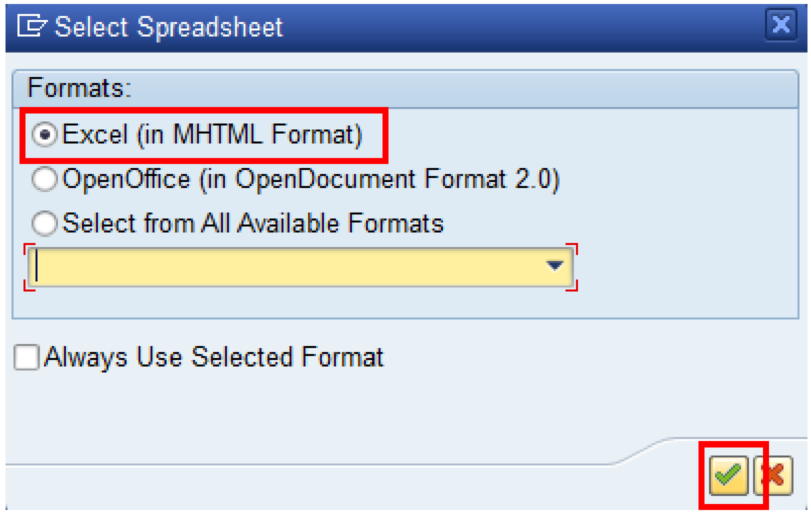
Education Grant Advance Recovery



26. Click List➔ Export➔ Spreadsheet... Ctrl+Shift+F7 menu item

.

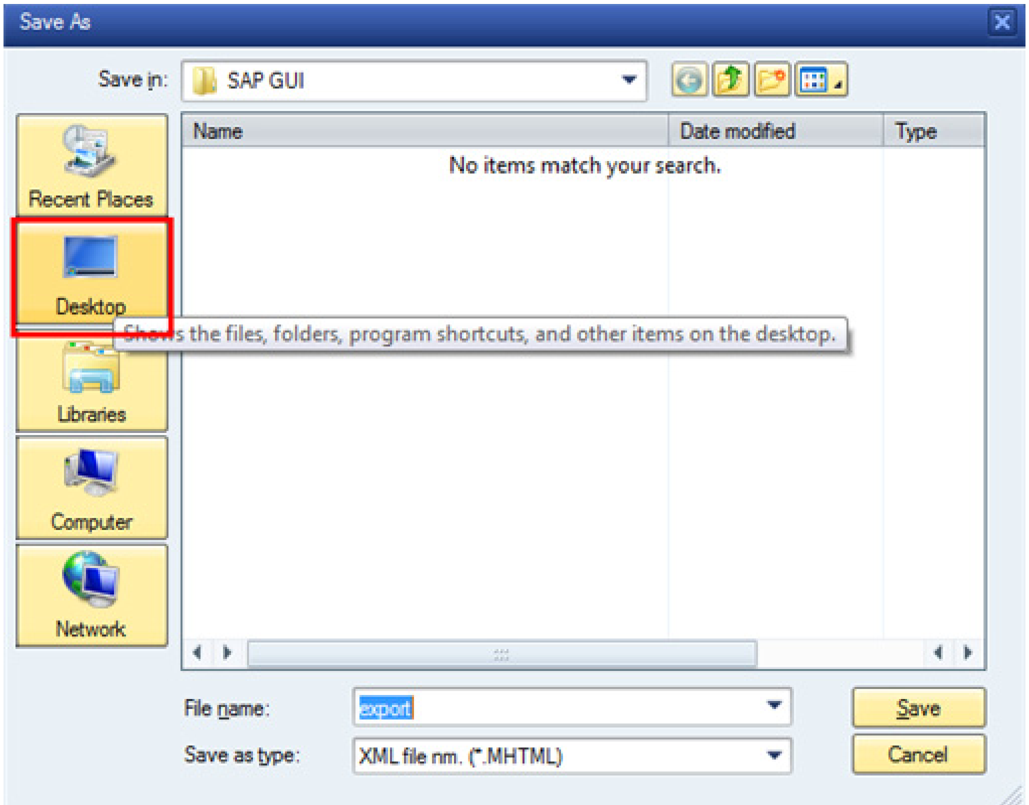
Select Spreadsheet



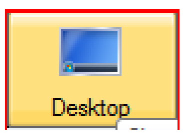
27. Select the format to export. [Scenario: Excel (in MHTML Format)]

Click .

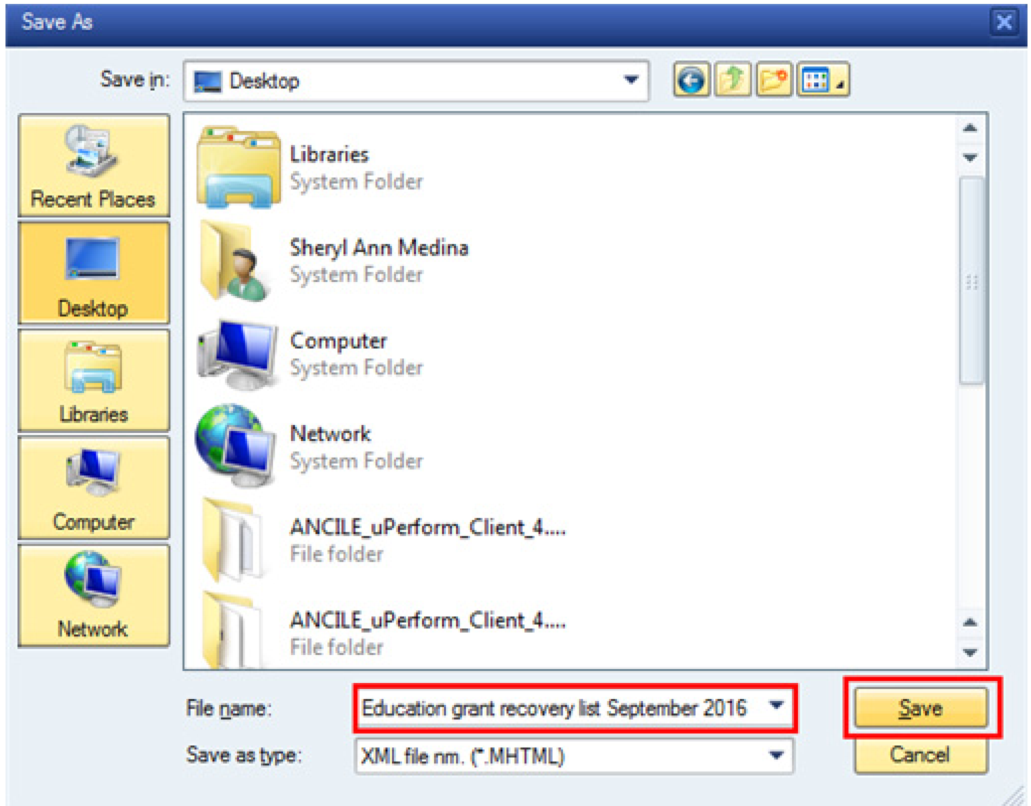
Save As



28.

Click  to save the file to your pc desktop.

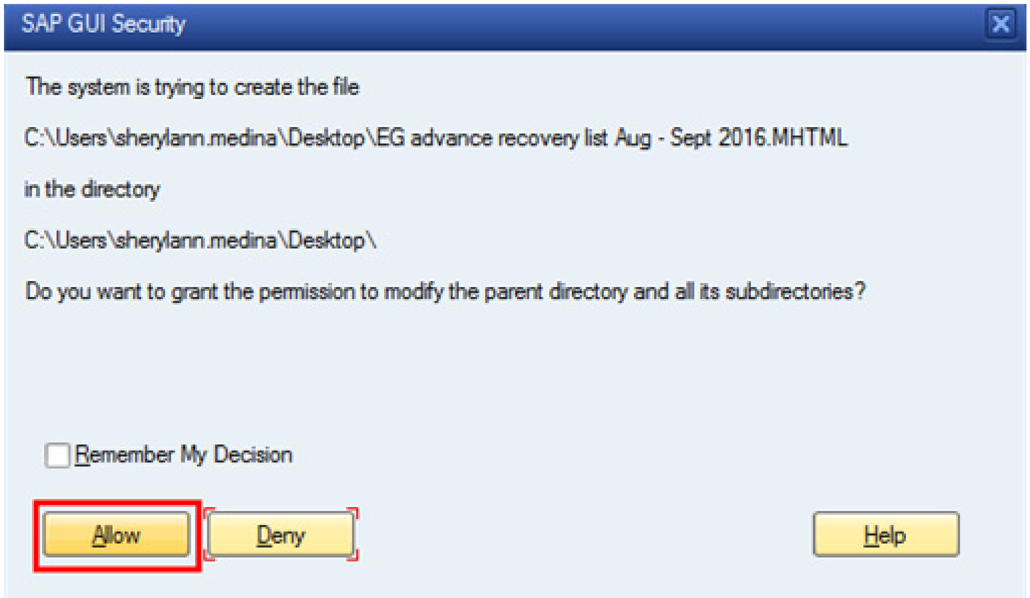
Save As



29. Enter a name for the file in the File name text box.

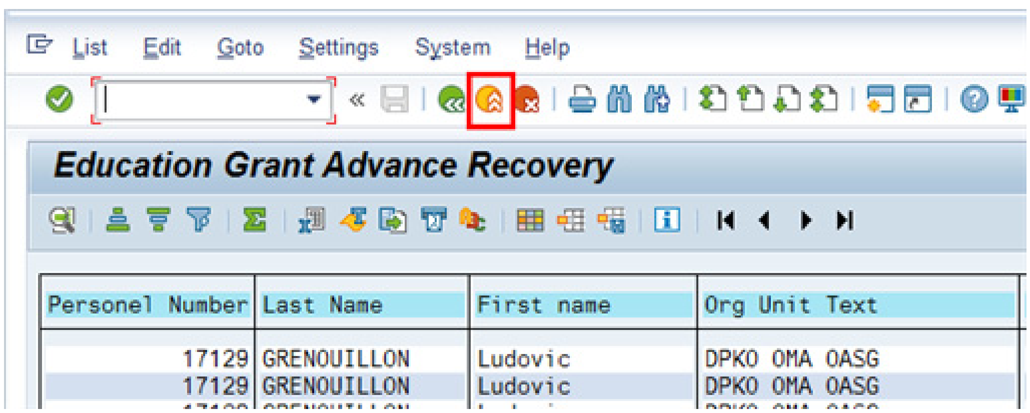
Click  to save the file.

SAP GUI Security



30. Click  to allow the system to create the file.

Education Grant Advance Recovery



31. Click  to return to the SAP Easy Access screen.

3.3.3 Rental Subsidy Monitoring Report

Full information on how to conduct the monitoring exercise is contained in the Rental Subsidy chapter of the Entitlements job aid.

Use this report to generate Entitlements Monitoring Report for self-certified cases. This action should be completed after you have initiated rental subsidy entitlement monitoring, as a means to track staff member compliance.

Scenario

After initiating rental subsidy monitoring 16 days ago, a monitoring report is needed to track the progress of staff member's response to the document request.

3.4 Separation

3.4.1 Report: Staff Approaching Retirement Age

Use this report to generate a list of staff members approaching retirement age.

Scenario

An HR Partner in NY wants to see the list of staff in New York, Washington, Tampa and Miami who are approaching retirement age six months from now.

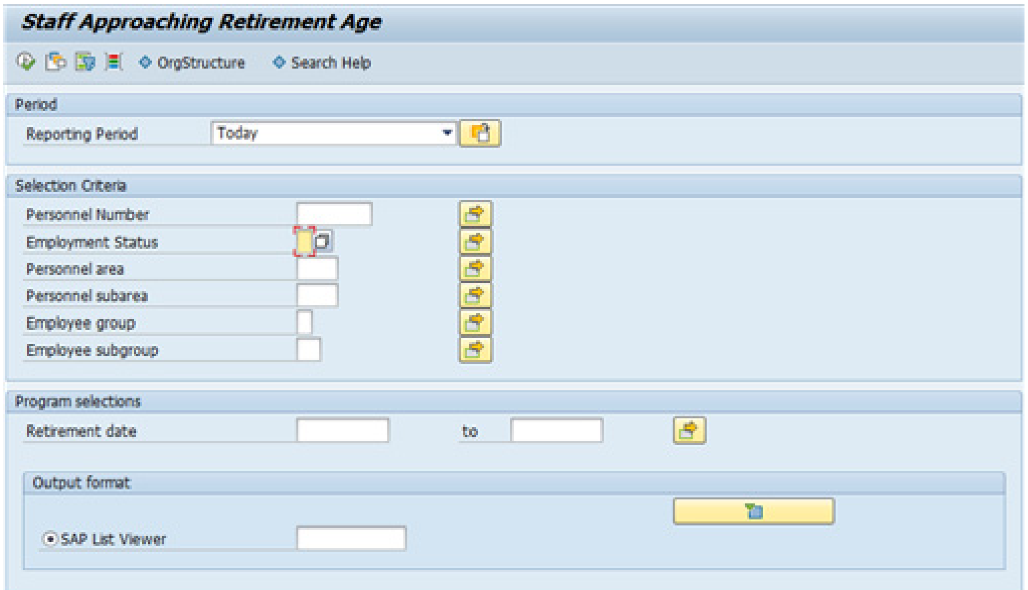
Procedure

1. Start the transaction using the menu path or transaction code.

SAP Easy Access

2. Click after typing ZPA_Retiring in the Command text box.

Staff Approaching Retirement Age



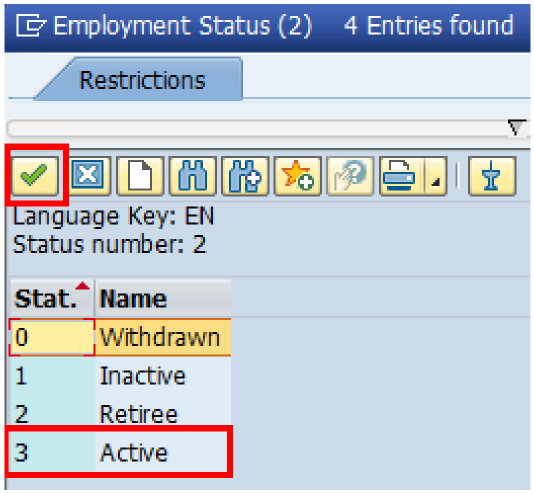
3. This report can be run using different selection criteria. For example you can search for a specific staff member or for staff in multiple or specific Personnel Areas (countries) and/or Subareas (duty stations).

In this example, a search will be constructed to find:

- Active staff members
- Stationed in the United States (Personnel Area)
- At duty stations in New York, Washington DC, Miami, and Tampa

Click to display the list of options for Employee Status.

Employment Status (2) 4 Entries found

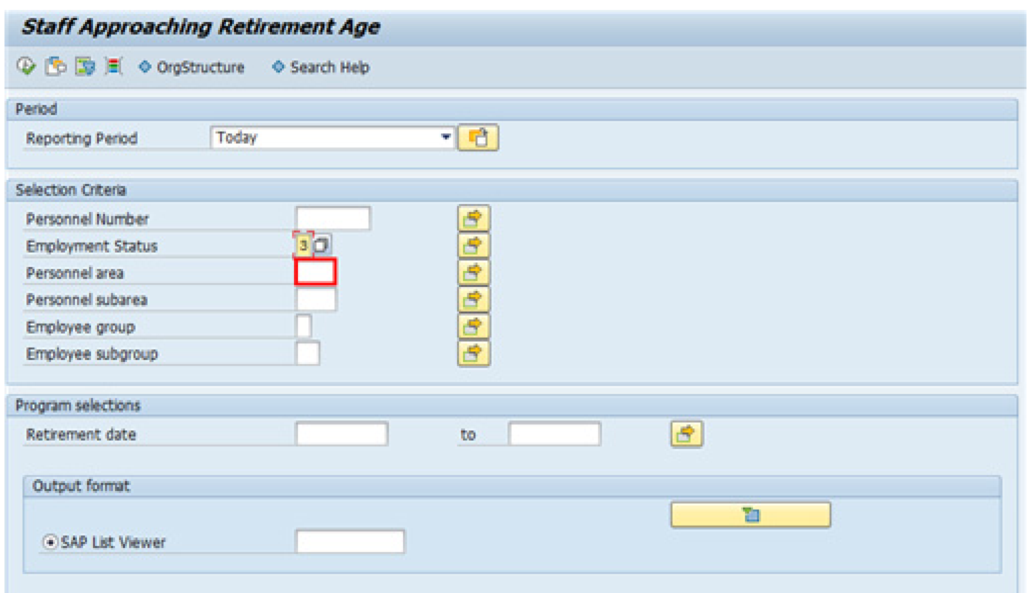


4. This list shows all possible values for employment status, but for the purposes of this report, only **Active** is used.

Click 3 Active to select all active staff members.

5. Click ✔ to confirm selection.

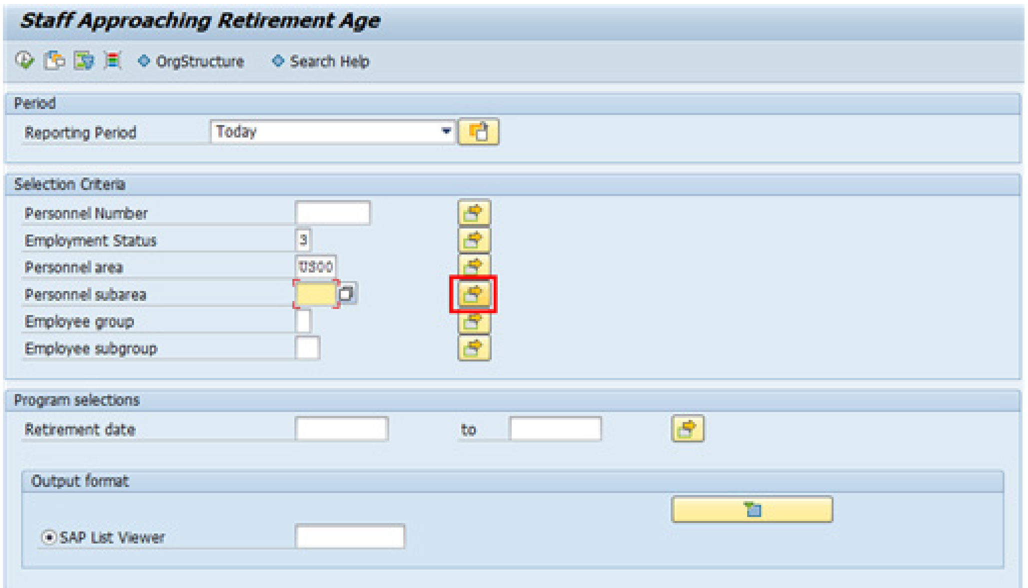
Staff Approaching Retirement Age



6. In addition to using the options list to select a value for a search criteria field, you can also directly type in a value.

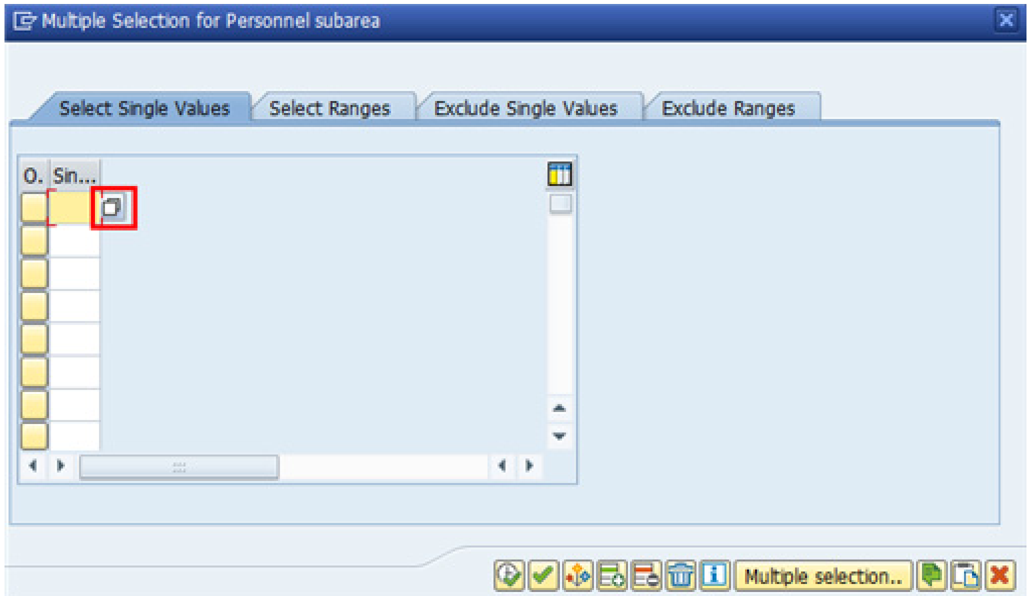
To limit the search results to active staff members in the United States, type US00 in the Personnel area text box.

Staff Approaching Retirement Age



7. For Employment Status and Personnel area, single values were selected or entered. Click  to the right of a criteria field if you want to enter more than one value for the search. For example, this search will include multiple Personnel subareas (duty stations).

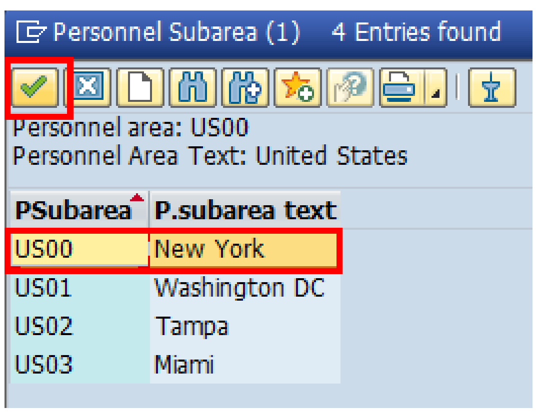
Multiple Selection for Personnel subarea



8. On the Select Single Values tab, multiple individual values can be selected, one per line.

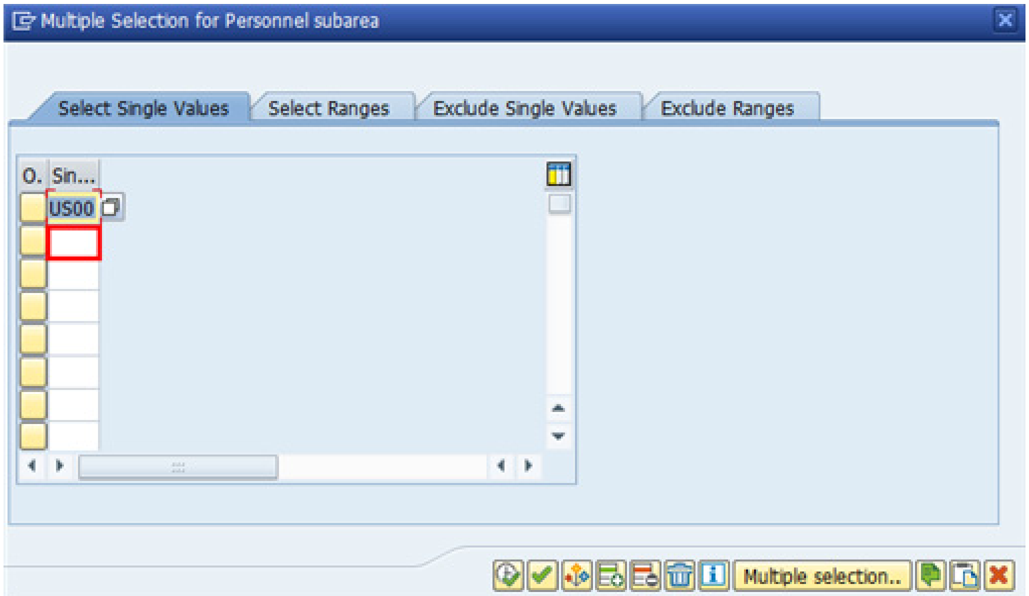
Click to display the list of values.

Personnel Subarea (1) 4 Entries found



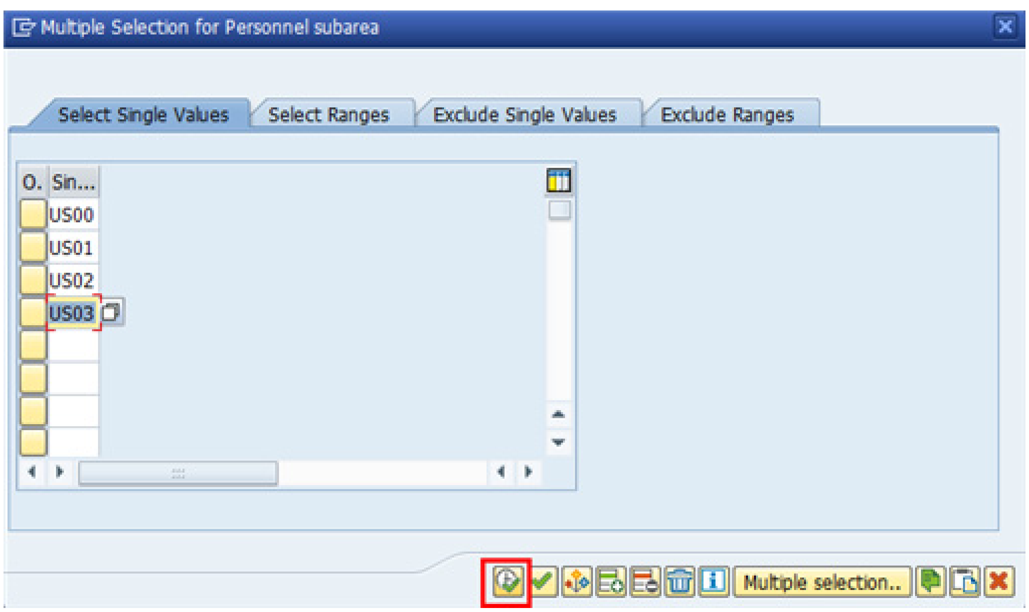
9. Select a value, then click to continue.

Multiple Selection for Personnel subarea



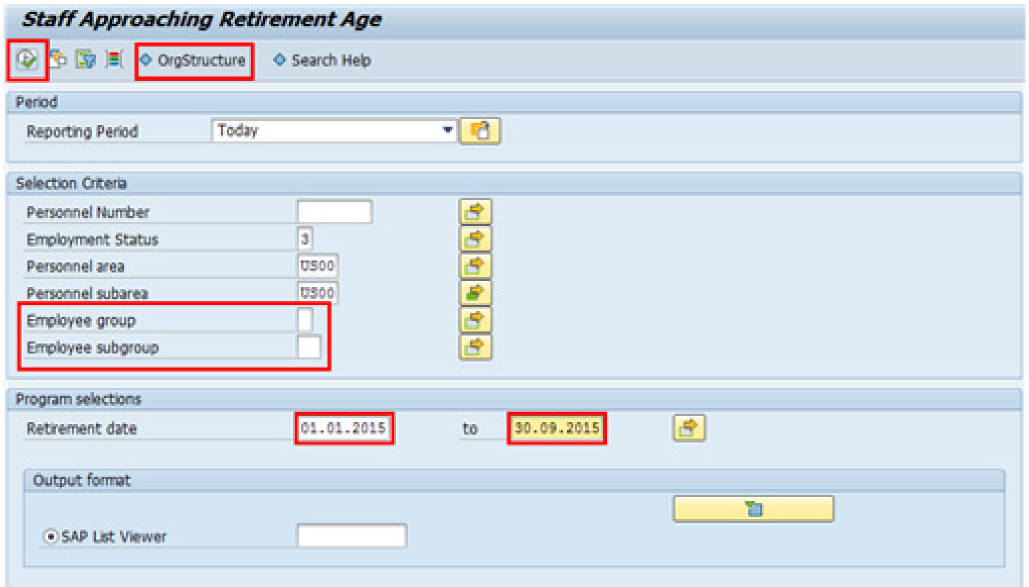
10. Click the text box on the next line to add another value. Repeat the steps above to add as many additional values to the selection criteria.

Multiple Selection for Personnel subarea



11. When done adding values, click to confirm selections and return to the report form.

Staff Approaching Retirement Age



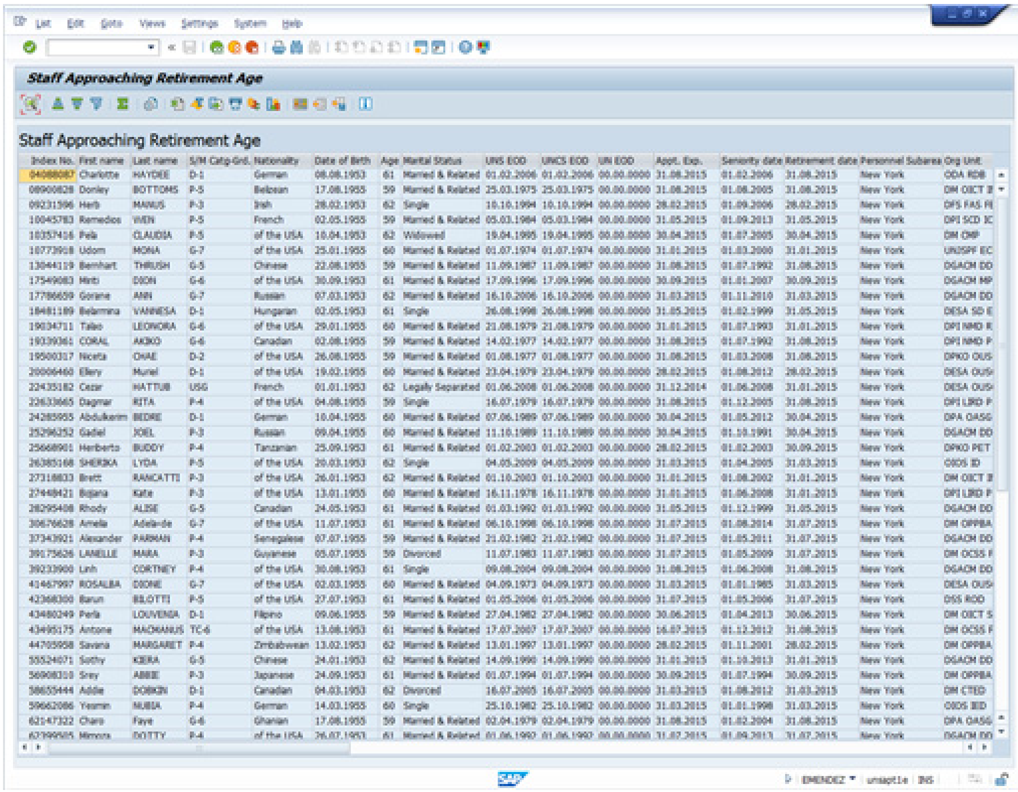
12. The search results should be limited to a specific date range. [Scenario: from 01.01.2015 to 30.09.2015]

Although not specified in this example, you may also include values for Employee group (International, Local) and Employee subgroup (Values depend on selection for Employee group).

You can also specify that records for only specific departments are found by clicking OrgStructure and selecting the departments to include.

Click to execute the report.

Staff Approaching Retirement Age



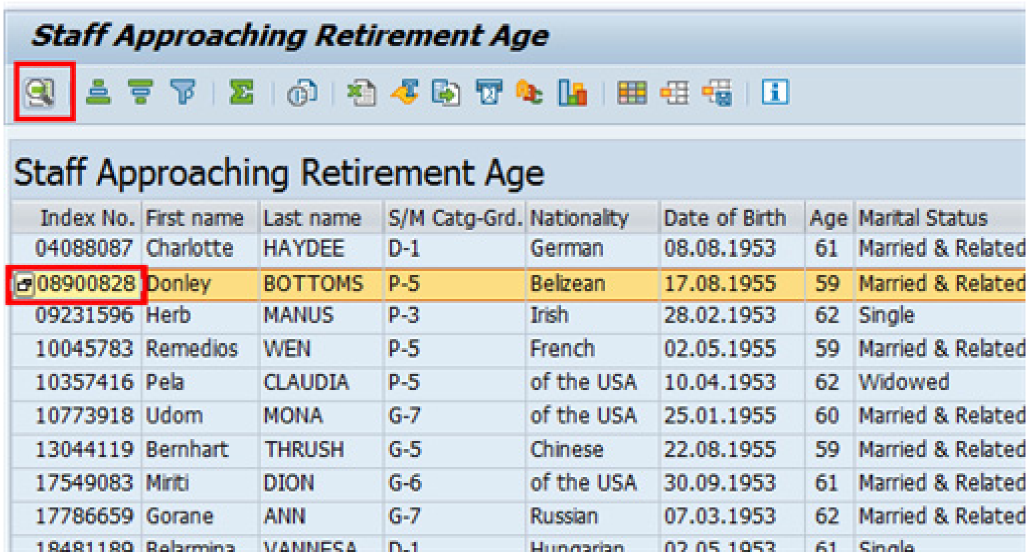
Staff Approaching Retirement Age

Staff Approaching Retirement Age

Index No.	First name	Last name	S/M Catg-Grd.	Nationality	Date of Birth	Age	Marital Status	UNS EOD	UNCS EOD	UN EOD	Appt. Exp.	Seniority date	Retirement date	Personnel Subarea	Org Unit
04088087	Charlotte	HAYDEE	D-1	German	08.08.1953	61	Married & Related	01.02.2006	01.02.2006	00.00.0000	31.08.2015	01.02.2006	31.08.2015	New York	ODA RDB
08900828	Donley	BOTTOMS	P-5	Belgian	17.08.1955	59	Married & Related	25.03.1975	25.03.1975	00.00.0000	31.08.2015	01.08.2005	31.08.2015	New York	DM OICT B
09231596	Herb	MANUS	P-3	Irish	28.02.1953	62	Single	10.10.1994	10.10.1994	00.00.0000	28.02.2015	01.09.2006	28.02.2015	New York	DFS FAS FI
10045783	Remedios	WEN	P-5	French	02.05.1955	59	Married & Related	05.03.1984	05.03.1984	00.00.0000	31.05.2015	01.09.2013	31.05.2015	New York	DPI SCD IC
10357416	Pela	CLAUDIA	P-5	of the USA	10.04.1953	62	Widowed	19.04.1995	19.04.1995	00.00.0000	30.04.2015	01.07.2005	30.04.2015	New York	DM OMP
10773918	Udom	MONA	G-7	of the USA	25.01.1955	60	Married & Related	01.07.1974	01.07.1974	00.00.0000	31.01.2015	01.03.2000	31.01.2015	New York	UNJSPF EC
13044119	Bernhart	THRUSH	G-5	Chinese	22.08.1955	59	Married & Related	11.09.1987	11.09.1987	00.00.0000	31.08.2015	01.07.1992	31.08.2015	New York	DGACM DD
17549083	Minti	DION	G-6	of the USA	30.09.1953	61	Married & Related	17.09.1996	17.09.1996	00.00.0000	30.09.2015	01.01.2007	30.09.2015	New York	DGACM MP
17786659	Gorane	ANN	G-7	Russian	07.03.1953	62	Married & Related	16.10.2006	16.10.2006	00.00.0000	31.03.2015	01.11.2010	31.03.2015	New York	DGACM DD
18481189	Belarmina	VANNESA	D-1	Hungarian	02.05.1953	61	Single	26.08.1998	26.08.1998	00.00.0000	31.05.2015	01.02.1999	31.05.2015	New York	DESA SD E
19034711	Taleo	LEONORA	G-6	of the USA	29.01.1955	60	Married & Related	21.08.1979	21.08.1979	00.00.0000	31.01.2015	01.07.1993	31.01.2015	New York	DPI NMD R
19339361	CORAL	AKIKO	G-6	Canadian	02.08.1955	59	Married & Related	14.02.1977	14.02.1977	00.00.0000	31.08.2015	01.07.1992	31.08.2015	New York	DPI NMD P
19500317	Niceta	OVAE	D-2	of the USA	26.08.1955	59	Married & Related	01.08.1977	01.08.1977	00.00.0000	31.08.2015	01.03.2008	31.08.2015	New York	DPKO OUS
20006460	Ellery	Muriel	D-1	of the USA	19.02.1955	60	Married & Related	23.04.1979	23.04.1979	00.00.0000	28.02.2015	01.08.2012	28.02.2015	New York	DESA OUS
22435182	Cezar	HATTUB	USG	French	01.01.1953	62	Legally Separated	01.06.2008	01.06.2008	00.00.0000	31.12.2014	01.06.2008	31.01.2015	New York	DESA OUS
22633665	Dagmar	RITA	P-4	of the USA	04.08.1955	59	Single	16.07.1979	16.07.1979	00.00.0000	31.08.2015	01.12.2005	31.08.2015	New York	DPI LRD P
24285955	Abdulkerim	BEDRE	D-1	German	10.04.1955	60	Married & Related	07.06.1989	07.06.1989	00.00.0000	30.04.2015	01.05.2012	30.04.2015	New York	DPA OASG
25296252	Gadiel	JOEL	P-3	Russian	09.04.1955	60	Married & Related	11.10.1989	11.10.1989	00.00.0000	30.04.2015	01.10.1991	30.04.2015	New York	DGACM DD
25668901	Herberto	BUDDY	P-4	Tanzanian	25.09.1953	61	Married & Related	01.02.2003	01.02.2003	00.00.0000	28.02.2015	01.02.2003	30.09.2015	New York	DPKO PET
26385168	SHERIKA	LYDA	P-5	of the USA	20.03.1953	62	Single	04.05.2009	04.05.2009	00.00.0000	31.03.2015	01.04.2005	31.03.2015	New York	OIOS ID
27318833	Brett	RANCATTI	P-3	of the USA	26.01.1953	62	Married & Related	01.10.2003	01.10.2003	00.00.0000	31.01.2015	01.08.2002	31.01.2015	New York	DM OICT B
27448421	Bojana	Kate	P-3	of the USA	13.01.1955	60	Married & Related	16.11.1978	16.11.1978	00.00.0000	31.01.2015	01.06.2008	31.01.2015	New York	DPI LRD P
28295408	Rhody	ALISE	G-5	Canadian	24.05.1953	61	Married & Related	01.03.1992	01.03.1992	00.00.0000	31.05.2015	01.12.1999	31.05.2015	New York	DGACM DD
30676628	Amelia	Adelaide	G-7	of the USA	11.07.1953	61	Married & Related	06.10.1998	06.10.1998	00.00.0000	31.07.2015	01.08.2014	31.07.2015	New York	DM OPPBA
37343921	Alexander	FARMAN	P-4	Senegalese	07.07.1955	59	Married & Related	21.02.1982	21.02.1982	00.00.0000	31.07.2015	01.05.2011	31.07.2015	New York	DGACM DD
39175626	LANELLE	MARA	P-3	Guyanese	05.07.1955	59	Divorced	11.07.1983	11.07.1983	00.00.0000	31.07.2015	01.05.2009	31.07.2015	New York	DM OCSS F
39233900	Linh	CORTNEY	P-4	of the USA	30.08.1953	61	Single	09.08.2004	09.08.2004	00.00.0000	31.08.2015	01.06.2008	31.08.2015	New York	DGACM DD
41467997	ROSALBA	DIONE	G-7	of the USA	02.03.1955	60	Married & Related	04.09.1973	04.09.1973	00.00.0000	31.03.2015	01.01.1985	31.03.2015	New York	DESA OUS
42368300	Barun	BILOTTI	P-5	of the USA	27.07.1953	61	Married & Related	01.05.2006	01.05.2006	00.00.0000	31.07.2015	01.05.2006	31.07.2015	New York	DSS ROD
43480249	Perla	LOUVENIA	D-1	Filipino	09.06.1955	59	Married & Related	27.04.1982	27.04.1982	00.00.0000	30.06.2015	01.04.2013	30.06.2015	New York	DM OICT S
43495175	Antone	MACMANUS	TC-6	of the USA	13.08.1953	61	Married & Related	17.07.2007	17.07.2007	00.00.0000	16.07.2015	01.12.2012	31.08.2015	New York	DM OCSS F
44705958	Savana	MARGARET	P-4	Zimbabwean	13.02.1953	62	Married & Related	13.01.1997	13.01.1997	00.00.0000	28.02.2015	01.11.2001	28.02.2015	New York	DM OPPBA
55524071	Sothy	KIERA	G-5	Chinese	24.01.1953	62	Married & Related	14.09.1990	14.09.1990	00.00.0000	31.01.2015	01.10.2013	31.01.2015	New York	DGACM DD
56908310	Srey	ABBIE	P-3	Japanese	24.09.1953	61	Married & Related	01.07.1994	01.07.1994	00.00.0000	30.09.2015	01.07.1994	30.09.2015	New York	DM OPPBA
58655444	Addie	DOBKIN	D-1	Canadian	04.03.1953	62	Divorced	16.07.2005	16.07.2005	00.00.0000	31.03.2015	01.08.2012	31.03.2015	New York	DM CTED
59662086	Yesmin	NUBIA	P-4	German	14.03.1955	60	Single	25.10.1982	25.10.1982	00.00.0000	31.03.2015	01.01.1998	31.03.2015	New York	OIOS IED
62147322	Charo	Faye	G-6	Ghanian	17.08.1955	59	Married & Related	02.04.1979	02.04.1979	00.00.0000	31.08.2015	01.02.2004	31.08.2015	New York	DPA OASG
62399505	Mimora	DOTTY	P-4	of the USA	26.07.1953	61	Married & Related	01.06.1992	01.06.1992	00.00.0000	31.07.2015	01.09.2013	31.07.2015	New York	DGACM DD

13. You can click on a specific staff member and scroll to the right to see all their information, or you can click the "Details" button to review their information in a scrollable window.

Staff Approaching Retirement Age

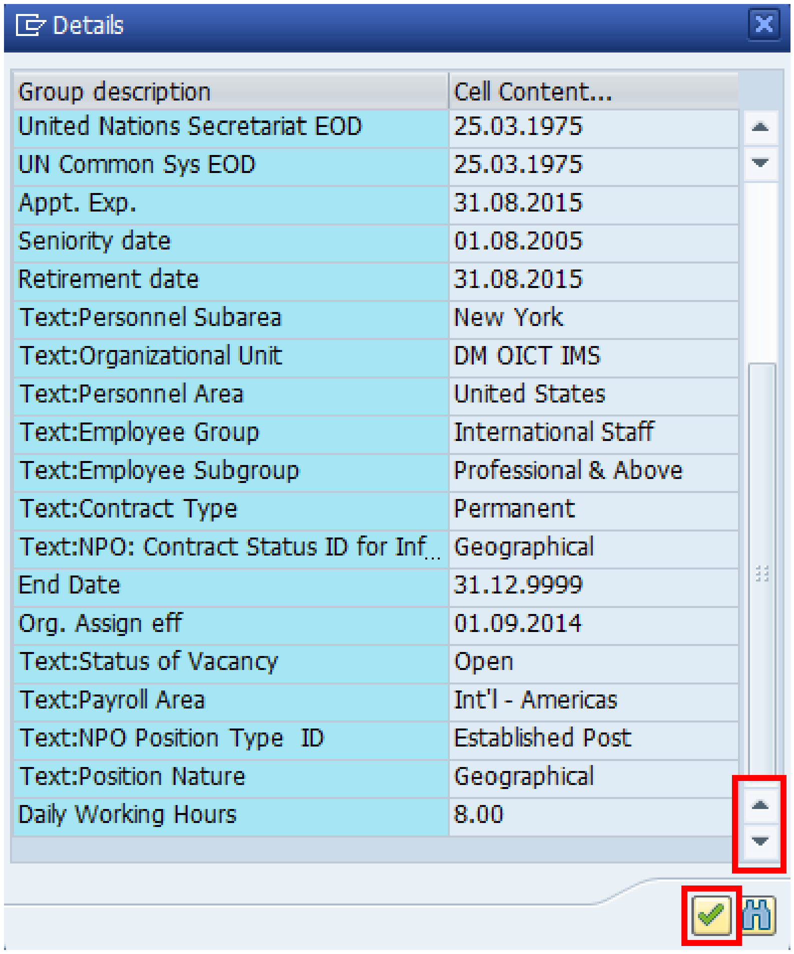

Staff Approaching Retirement Age

Staff Approaching Retirement Age

Index No.	First name	Last name	S/M Catg-Grd.	Nationality	Date of Birth	Age	Marital Status
04088087	Charlotte	HAYDEE	D-1	German	08.08.1953	61	Married & Related
08900828	Donley	BOTTOMS	P-5	Belizean	17.08.1955	59	Married & Related
09231596	Herb	MANUS	P-3	Irish	28.02.1953	62	Single
10045783	Remedios	WEN	P-5	French	02.05.1955	59	Married & Related
10357416	Pela	CLAUDIA	P-5	of the USA	10.04.1953	62	Widowed
10773918	Udom	MONA	G-7	of the USA	25.01.1955	60	Married & Related
13044119	Bernhart	THRUSH	G-5	Chinese	22.08.1955	59	Married & Related
17549083	Miriti	DION	G-6	of the USA	30.09.1953	61	Married & Related
17786659	Gorane	ANN	G-7	Russian	07.03.1953	62	Married & Related
18481189	Belarmina	VANNESA	D-1	Hungarian	02.05.1953	61	Single

14. Select a row, then click to view the details for that staff member.

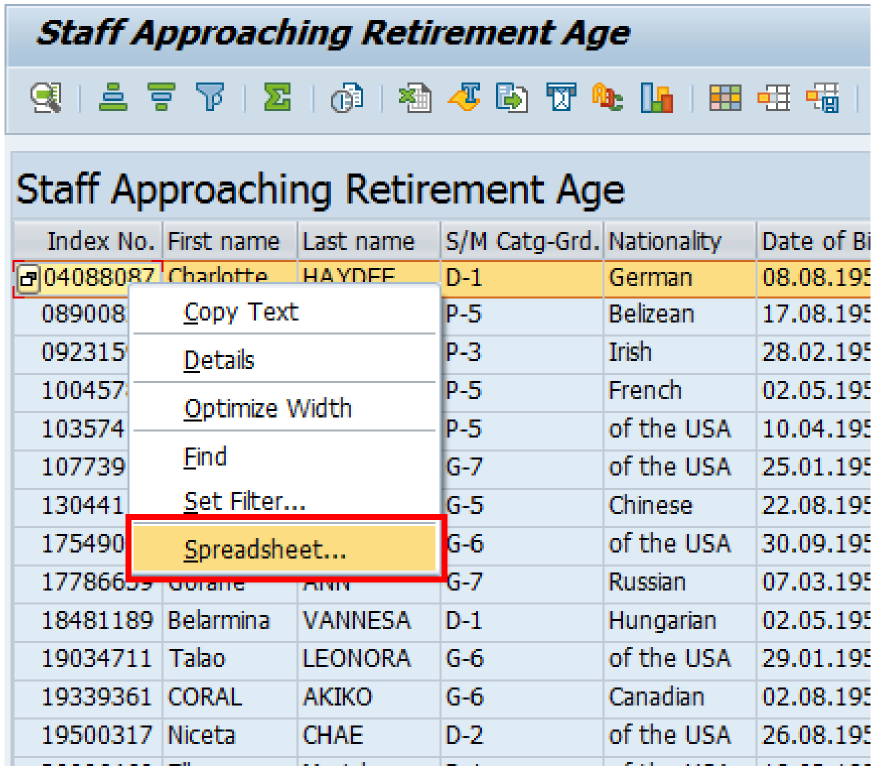
Details



Group description	Cell Content...
United Nations Secretariat EOD	25.03.1975
UN Common Sys EOD	25.03.1975
Appt. Exp.	31.08.2015
Seniority date	01.08.2005
Retirement date	31.08.2015
Text:Personnel Subarea	New York
Text:Organizational Unit	DM OICT IMS
Text:Personnel Area	United States
Text:Employee Group	International Staff
Text:Employee Subgroup	Professional & Above
Text:Contract Type	Permanent
Text:NPO: Contract Status ID for Inf...	Geographical
End Date	31.12.9999
Org. Assign eff	01.09.2014
Text:Status of Vacancy	Open
Text:Payroll Area	Int'l - Americas
Text:NPO Position Type ID	Established Post
Text:Position Nature	Geographical
Daily Working Hours	8.00

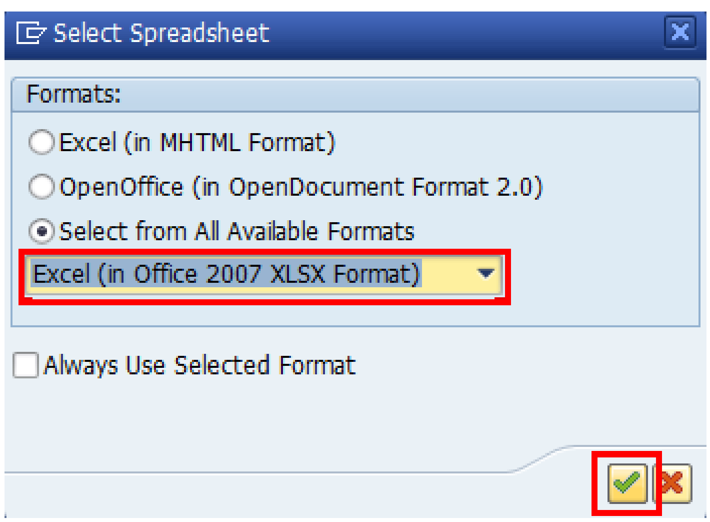
15. Scroll down to view all the information, then click to close the window.

Staff Approaching Retirement Age



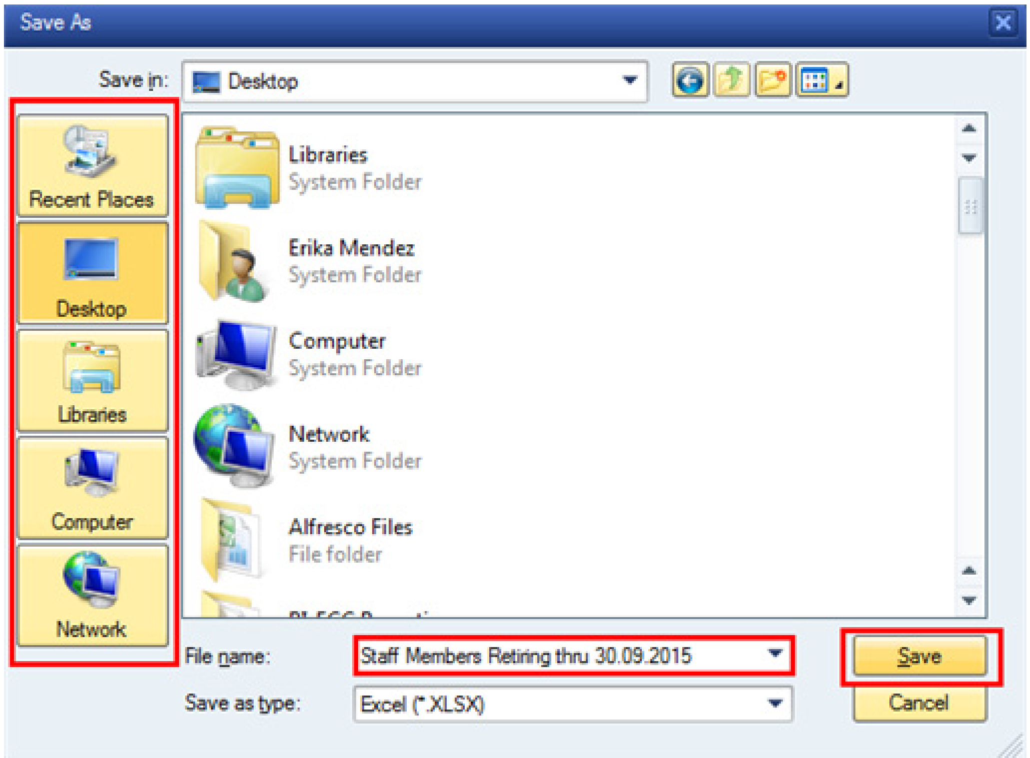
16. To export the report to Excel (or other file types) right-click any record, then click Spreadsheet... .

Select Spreadsheet



17. Select Excel (in office 2007 XLSX Format) then click .

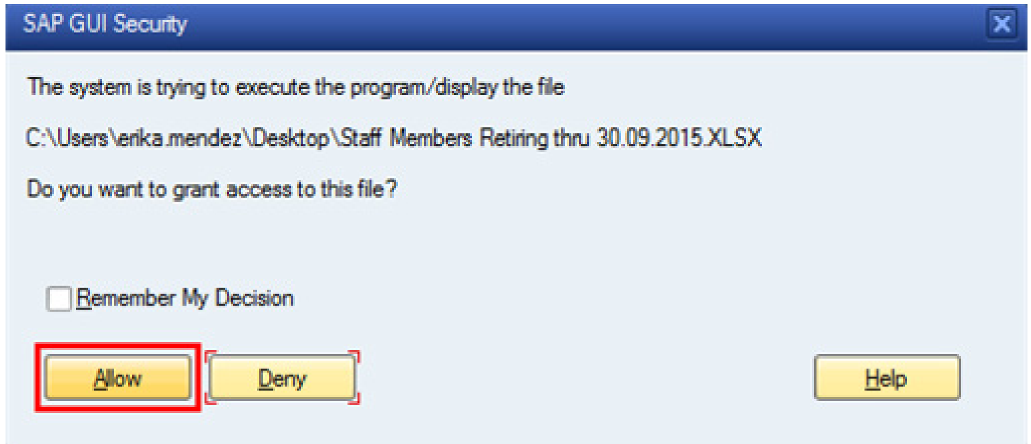
Save As



18. Select a location to save the file, enter a name for the file, then click Save.

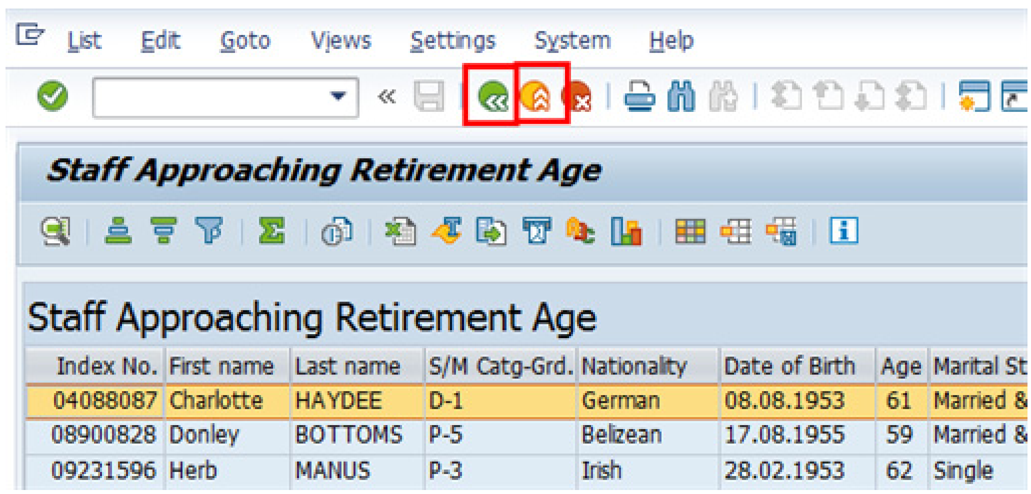
Once in Excel, you can easily locate or sort information based on column content. For example, you can use the Apt Type column to find records for Fixed Term, or Temporary appointments, etc.

SAP GUI Security



19. Click Allow to allow the file to be saved.

Staff Approaching Retirement Age



20. Once you have finished viewing the report in Umoja, click to return to the report selection criteria page.

21. Click to return to the SAP Easy Access screen.

HR Partner All

4 Time Monitoring Reports

New Content

The following reports can be used to monitor the accuracy of time recording in Umoja.

- ***Display Time Statement:*** used to identify staff members who have uncertified monthly time statements
- ***Display Leave Requests Pending Approval:*** used to review any leave requests that have been initiated in the Employee Self-Service Portal and are pending a next-level approval by either the Time Manager, Medical Services or the HR Partner
- ***Display Absence Quota Information:*** used to determine what leave has been recorded as taken during a specified period of time
- ***Display Accrual of CTO and ND for a Given Staff Member and Date Range***: used to display the accrual of hours on night differential, including those that are embedded as part of the work schedule which will not appear in IT2002 (Attendances)

4.1 Display Time Statement

Scenario

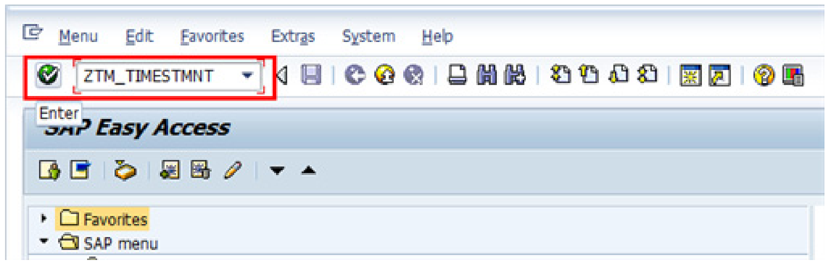
You have been asked to review the certification status of all monthly time statements for staff members in Advisory Committee on Administrative and Budgetary Questions (ACABQ).

4.1.1 Monitoring Procedure

Procedure

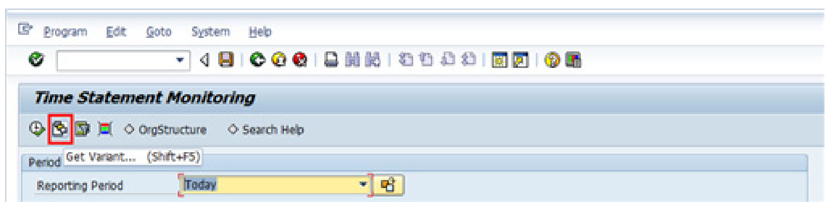
1. Start the transaction using the menu path or transaction code.

SAP Easy Access



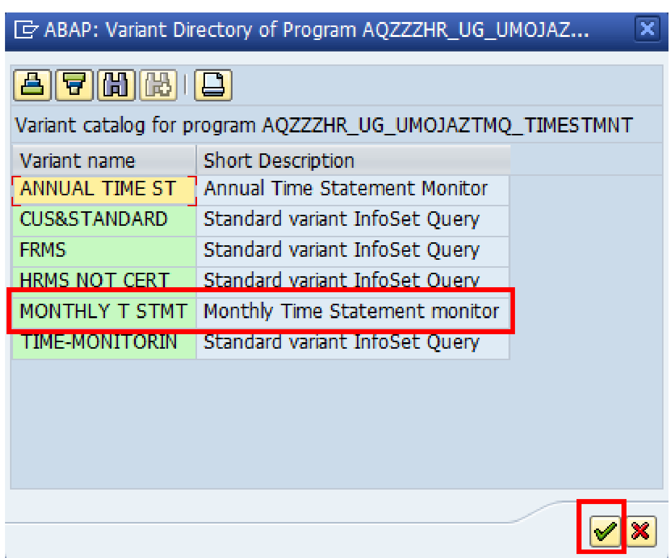
2. Click after typing ZTM_TIMESTMNT in the command text box.

Time Statement Monitoring



3. Click to open the Variant directory.

ABAP: Variant Directory of Program AQZZZHR_UG_UMOJAZTMQ_TIMESTMNT



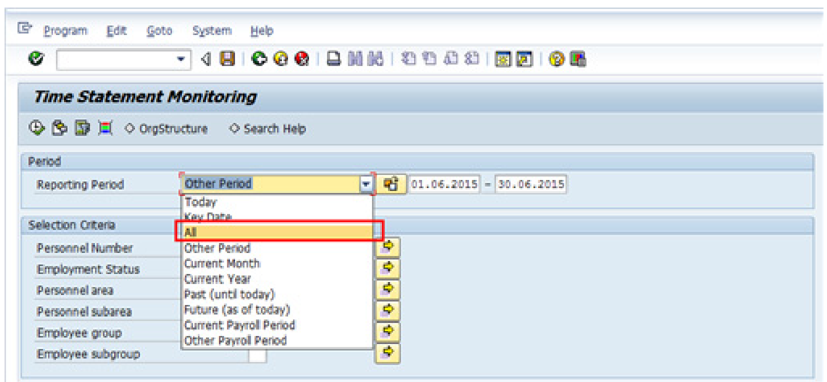
4. From the Variant Directory, select the variant for this report. [Scenario: MONTHLY T STMT - Monthly Time Statement monitor]

Variant options are:

- **ANNUAL TIME ST** - used to check the certification status of Annual Time Statement
- **MONTHLY T STMT** - used to check the certification status of monthly time statements

5. Click  to select the variant.

Time Statement Monitoring



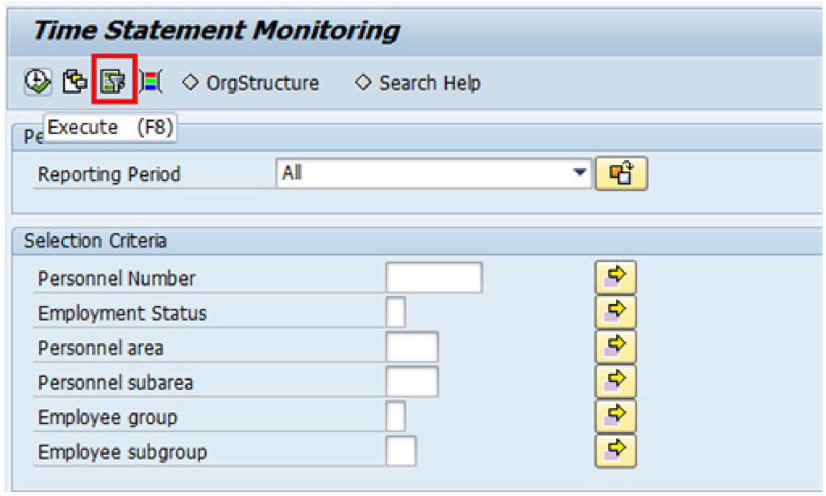
6. The Reporting Period in the Period section defaults to **Other period**, which enables you to search for the monthly statements issued during a definitive time frame (i.e. 01.06.2016 - 30.06.2016)

Select **All** to capture all the monthly time statements, whether certified or not, for an individual staff member.

Reporting Period options are:

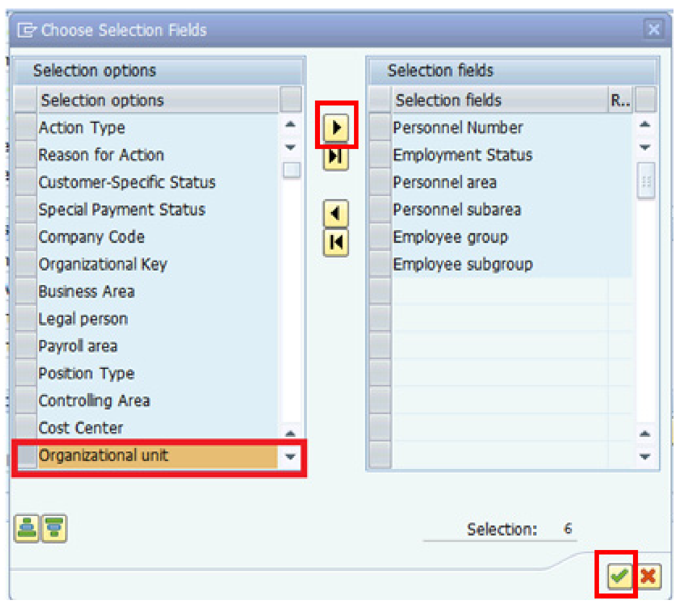
- **Today** – used to filter the records by today's date. The system will display staff members monthly time statements generated as of today.
- **Key Date** - used to filter the records by the date you entered. For example, if you enter 30.04.2016 as the key date the system will display staff members monthly time statements on 30.04.2016.
- **All** – used to display a list of all staff who submitted a monthly time statement from 01.01.1800 through 31.12.9999.
- **Other Period** - used to filter the records by the date range you entered. For example, if you enter 01.04.2016 - 31.05.2016 the system will display the staff member's monthly time statements for the month of April and May.
- **Current Month** – used to filter the records by the current month. The system will display the staff member's monthly time statement for the current month.
- **Current Year** – used to filter the records by the current year. The system will display the staff member's monthly time statement for the current year.
- **Past (until today)** – used to filter the records by the past year to the current date. The system will display the staff member's monthly time statements from 01.01.1800 up to the today's date.
- **Future (as of today)** – used to filter the records by the current date and future dates. The system will display the staff member's monthly time statement as of the current date and beyond.
- **Current Payroll Period** - used to filter the records by the current payroll period. The system will display the staff member's monthly time statement for the current payroll period.
- **Other Payroll Period** - used to filter the records by the current payroll period. The system will display the staff member's monthly time statement for other payroll periods.

Time Statement Monitoring



7. Click to open the selection Fields to add Organizational unit to the selection options.

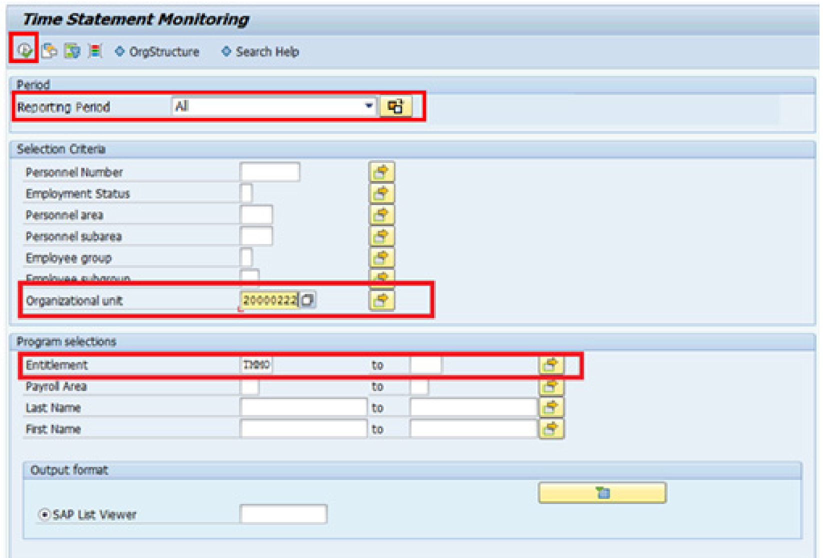
Choose Selection Fields



8. Select Organizational unit, then click to add to the Selection fields list.

9. Click to confirm selection.

Time Statement Monitoring

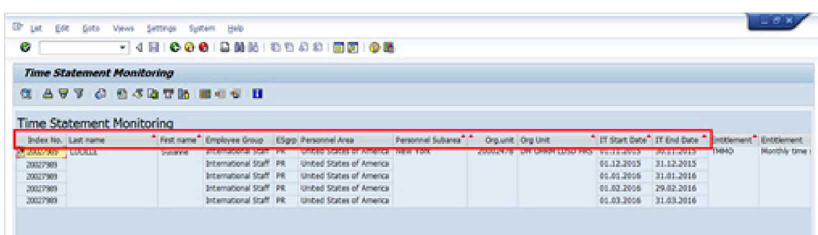


10. Enter the Organizational Unit code for Advisory Committee on Administrative and Budgetary Questions (ACABQ). [Scenario: 20000222].

Notice that the Entitlement field under Program Selections has been pre-populated after selecting the Variant MONTHLY T STMT. No action is required in this portion.

11. Click to run the report.

Time Statement Monitoring

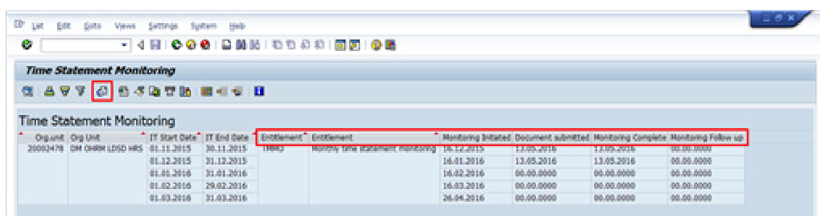


12. Based on the period and variant that was chosen (i.e. All, Monthly Time Statements), the system will generate a list of all available monthly time statements for the selected Organizational unit.

The generated report has the following information:

- **Index No**.- displays the staff member's Personnel No.
- **Name** - two columns displaying the staff member's first and last name.
- **Employee Group** - displays the staff member's group, e.g. International Staff.
- **ESgrp** - displays the staff member's subgroup type, e.g. PR (Professional).
- **Personnel Area and Personnel Subarea** - two columns that display the staff member's duty station information, e.g. United States of America and New York, respectively.
- **Org Unit** - two columns displaying the staff member's organizational unit information (number and name).
- **IT Start Date and IT End Date** - two columns displaying the dates of the monthly time statements.

Time Statement Monitoring



13. Click to scroll to the right and see the remaining columns.

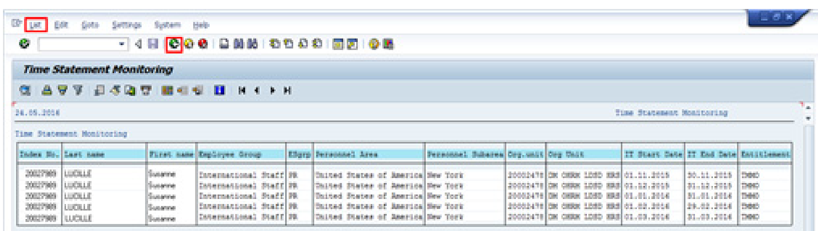
In this example, you will see that the staff member certified the time statements for the months November 2015 and December 2015. The staff member has not certified the time statements for the months January, February and March 2016.

The remaining columns are:

- **Entitlement**- The type of report selected, in this case TMMO, the Monthly Time Statement.
- **Monitoring Initiated** - when the monthly time statement was issued.
- **Document submitted** - when the staff member certified the monthly time statement.
- **Monitoring Complete** - when the staff member submitted the monthly time statement.
- **Monitoring Follow-up** - which statements are pending certification.

14. Click to print preview.

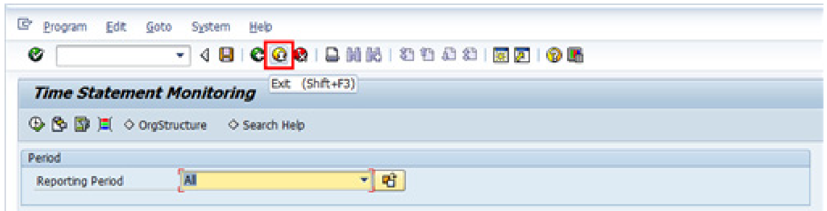
Time Statement Monitoring



15. You can save this report as an Excel file by clicking **List-> Export-> Spreadsheet** and follow the on screen instructions to save the spreadsheet.

16. Click multiple times until you exit the report screen and the Time Statement Monitoring filter screen appears.

Time Statement Monitoring



17. Click to return to the SAP Easy Access screen.

4.1.2 Monitoring Analysis

If you have extracted the report for an Organizational unit for the period 01.04.2016 - 30.03.2017 you have the data needed for the analysis.

If there is a valid date in the *Monitoring complete* column, then the staff member has certified that Monthly Time Statement.

Any rows that are empty or have 00.00.000 (determined by how you export the report to Excel) in the *Monitoring complete* date column show uncertified Monthly Time Statements. The HR Partner or Time Senior Administrator must follow up with the staff member to ensure certification.

4.2 Display Leave Requests Pending Approval

Scenario

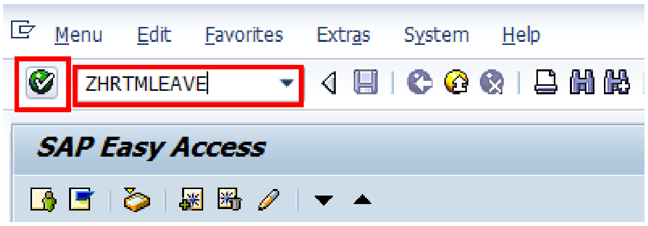
You have been asked to review all pending leave requests in ESS for Advisory Committee on Administrative and Budgetary Questions (ACABQ) as a whole, as well as for an individual staff member, personnel number: 20002312.

4.2.1 Monitoring Procedure

Procedure

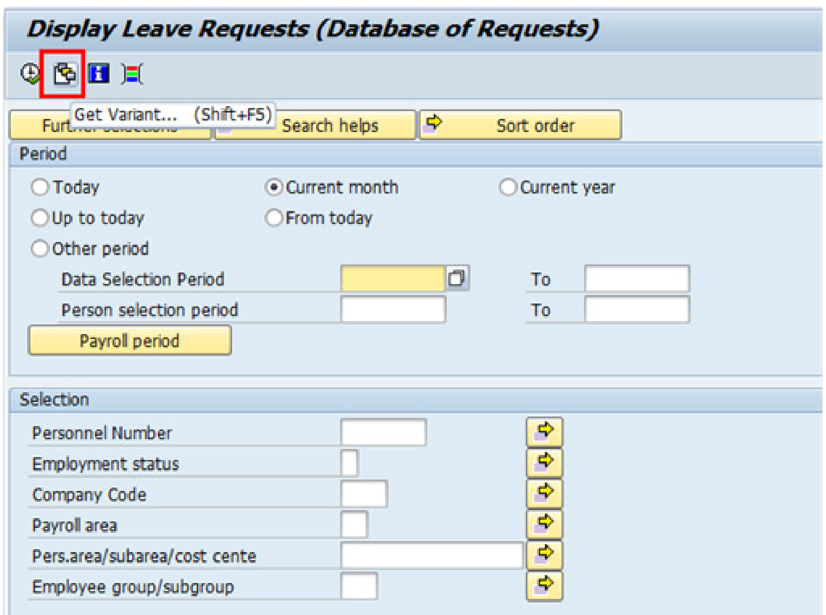
1. Start the transaction using the menu path or transaction code.

SAP Easy Access



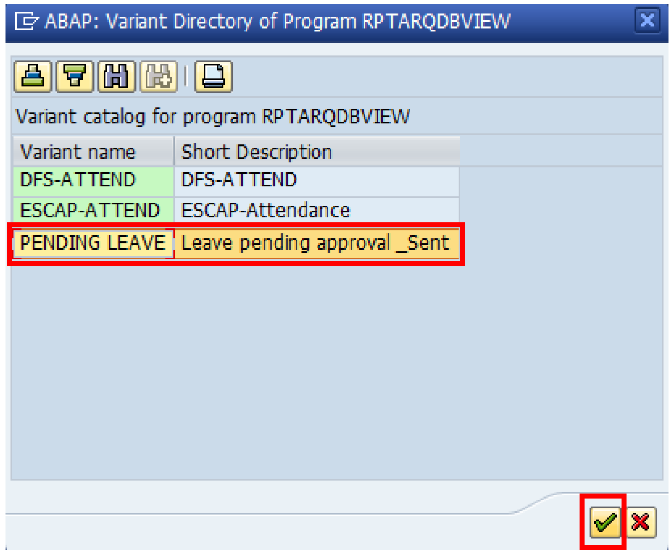
2. Click after typing ZHRTMLEAVE in the Command text box.

Display Leave Requests (Database of Requests)



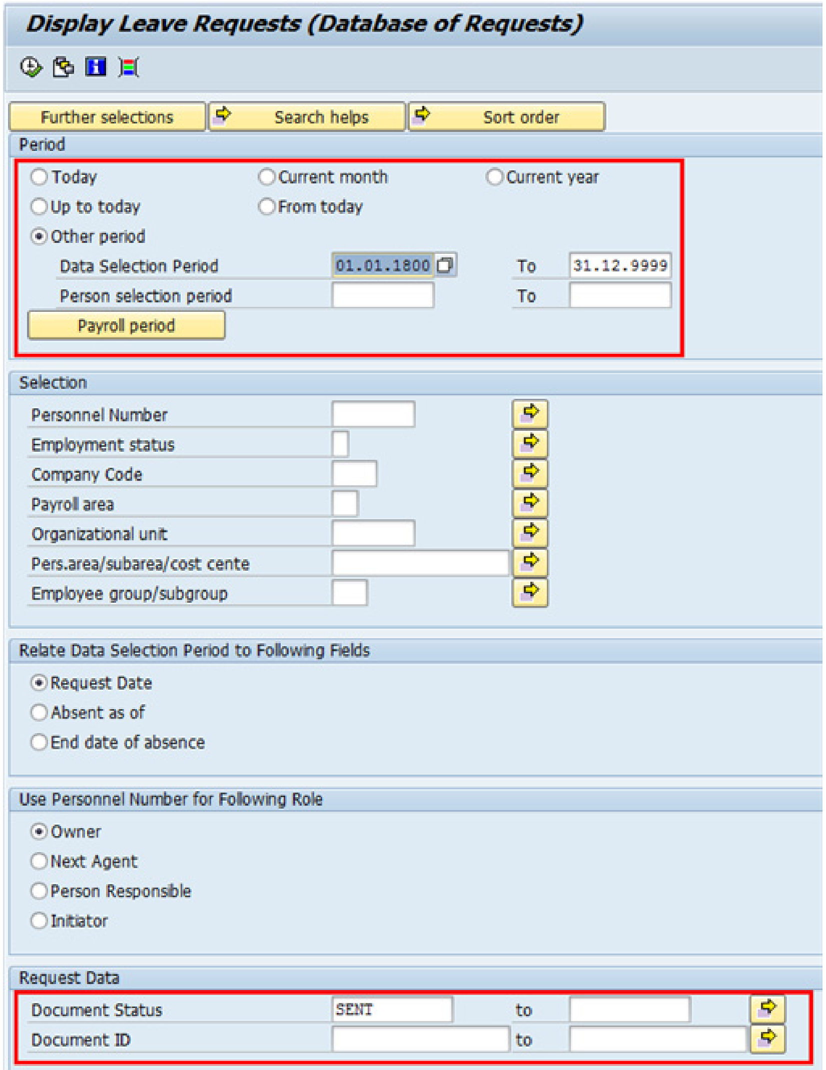
3. A standard variant called **PENDING LEAVE** has been created with specific parameters that will assist in extracting the relevant data. Click to access the list of saved report variants.

ABAP: Variant Directory of Program RPTARQDBVIEW



4. Select Pending Leave then click ✅ to confirm selection.

Display Leave Requests (Database of Requests)



5. The variant **PENDING LEAVE** includes the following parameters:

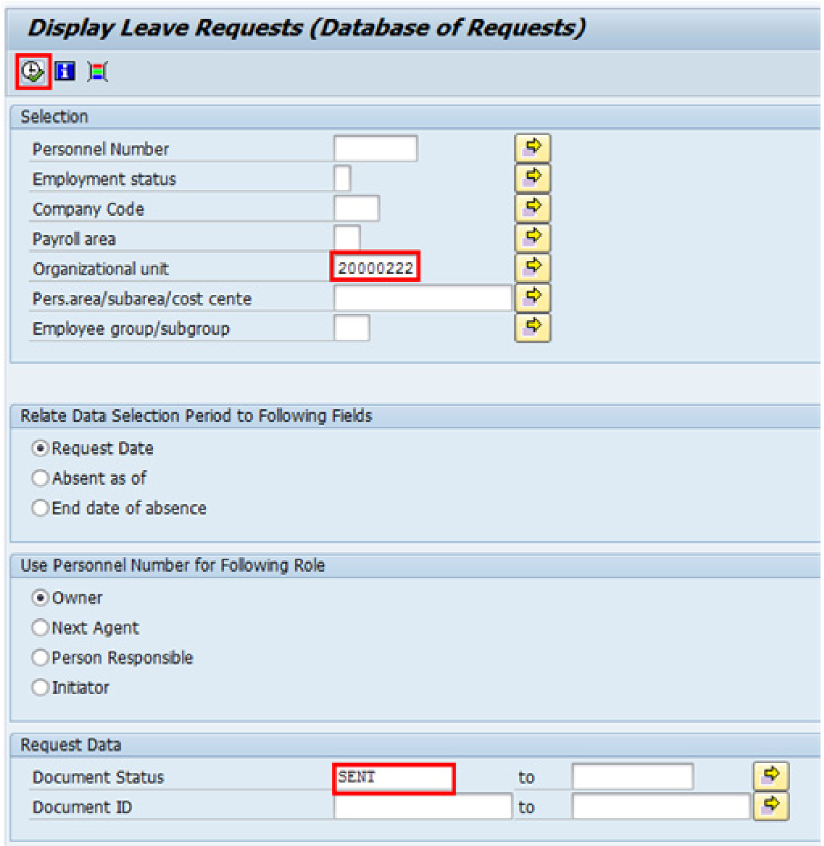
Under the Period section, **Other Period / Data Selection Period** was chosen with the dates 01.01.1800 to 31.12.9999. This will include all requests of leave that have already passed as well as leave requests for future dates.

You may also customize the period by selecting the other options:

- **Today** - This will capture only those leave requests that are submitted today
- **Up To Today** - This will capture any leave requests that are pending approval from the Go Live date (i.e. 01.11.2015 for C4 entities) up to today
- **Current Month** - This will display any leave requests that are pending approval in the current month
- **Current Year** - This will display any leave requests that are pending approval in the current Year
- **From Today -** This will capture only those leave requests that are submitted today

In the Request Data portion / Document Status, the parameter **SENT** will be defaulted based on the variant chosen. This will generate all sent requests on the Employee Self-Service Portal, that are pending approval.

Display Leave Requests (Database of Requests)



6. We must generate a report showing all leave requests sent by staff members in Advisory Committee on Administrative and Budgetary Questions (ACABQ), Department of Management (Organizational Unit code: 20000222), that require next-level approval on the Portal.

Enter 20000222 in the Organizational unit text box.

In the *Request Data* section, the Document Status field defaults to SENT, based on the variant that was chosen (i.e. PENDING LEAVE). If you need to review other statuses, replace SENT with the appropriate value such as REJECTED [See analysis below].

Click to generate the report.

HR Partner All

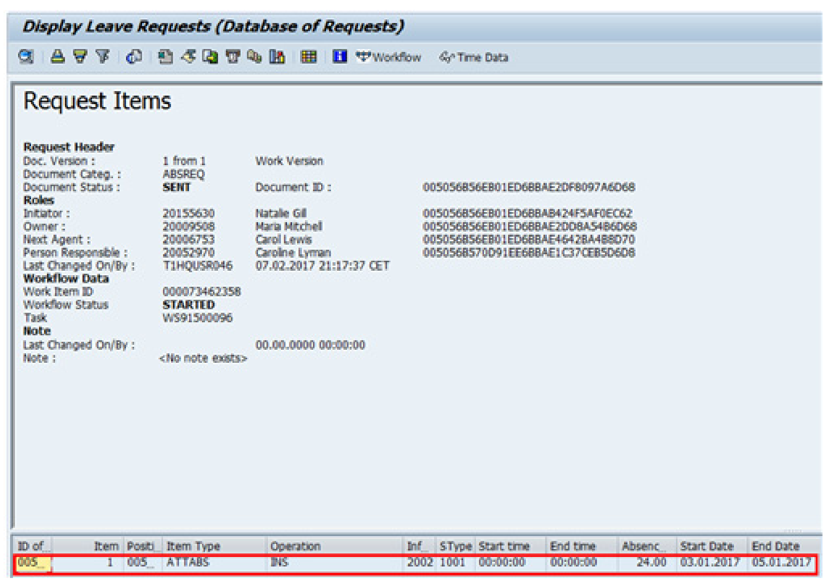
Display Leave Requests (Database of Requests)

7. The resulting report lists all staff members whose leave requests are pending approval within the Organizational Unit that was chosen. You may scroll right or down to see additional columns and rows.

You may choose to export this list to a spreadsheet [i.e. Excel] for further analysis offline. To do so, click the Local File icon or press CTRL+SHIFT+F9. This will allow you to export the report results to an Excel file and save it to your computer.

You may also continue your analysis online using the following tools. Double-click on one of the rows to see additional details.

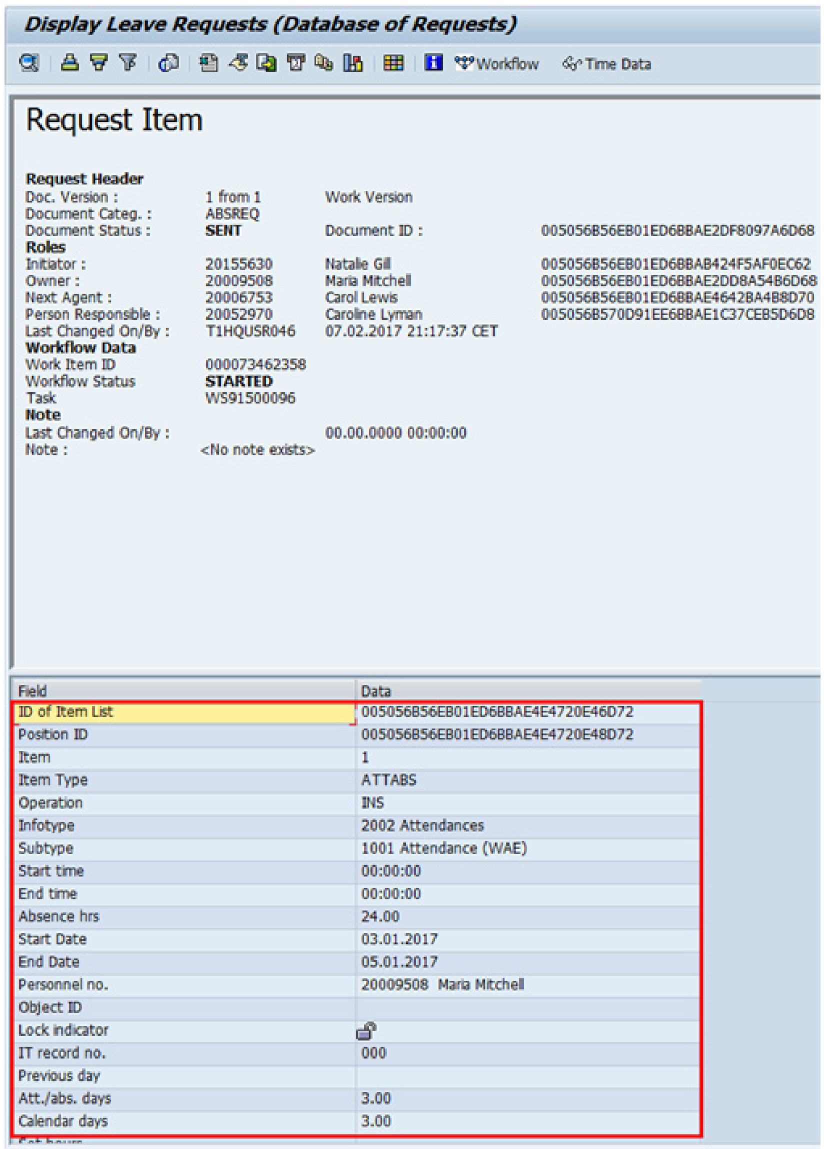
Desktop



8. This view displays the details of the leave request, such as who initiated the request, who the next approvers are, etc.

To see the type of leave and dates that were requested, double-click on the item row in the bottom portion of the screen to further expand the details.

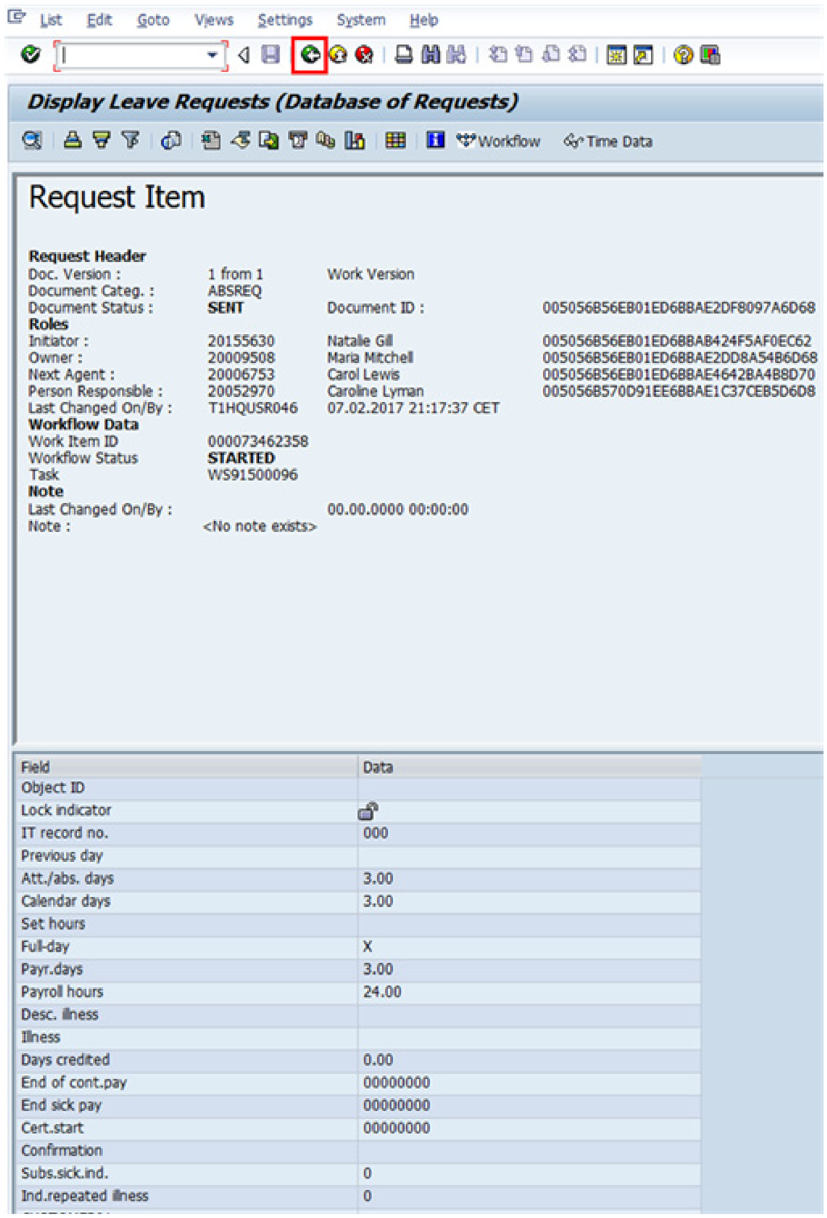
Display Leave Requests (Database of Requests)



Field	Data
ID of Item List	005056B56EB01ED6BBAE4E4720E46D72
Position ID	005056B56EB01ED6BBAE4E4720E48D72
Item	1
Item Type	ATTABS
Operation	INS
Infotype	2002 Attendances
Subtype	1001 Attendance (WAE)
Start time	00:00:00
End time	00:00:00
Absence hrs	24.00
Start Date	03.01.2017
End Date	05.01.2017
Personnel no.	20009508 Maria Mitchell
Object ID	
Lock indicator	
IT record no.	000
Previous day	
Att./abs. days	3.00
Calendar days	3.00

9. Immediately, you can see that this record falls under Infotype 2001 Absences with Subtype 1100 Annual Leave. The dates requested by the staff member are also displayed (i.e. 24.10.2016 to 26.10.2016). Scroll down to see the rest of the information.

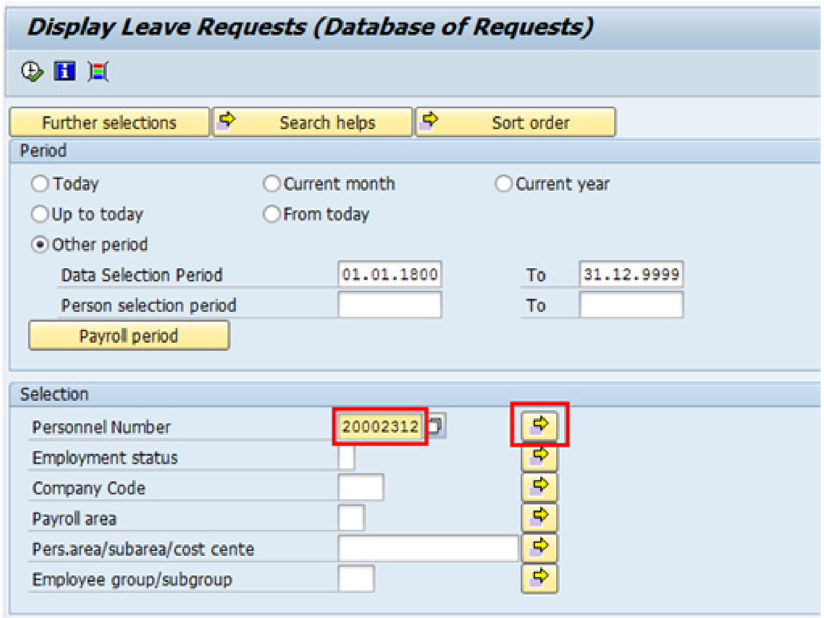
Display Leave Requests (Database of Requests)



10. This view also displays the total of days this request was for (i.e. Full-day = X (Yes), Payroll days = 3).

11. To return to the previous view, click three times to return to the parameter selection screen.

Display Leave Requests (Database of Requests)



12. It is also possible to create the report for an individual staff member or group of staff members.

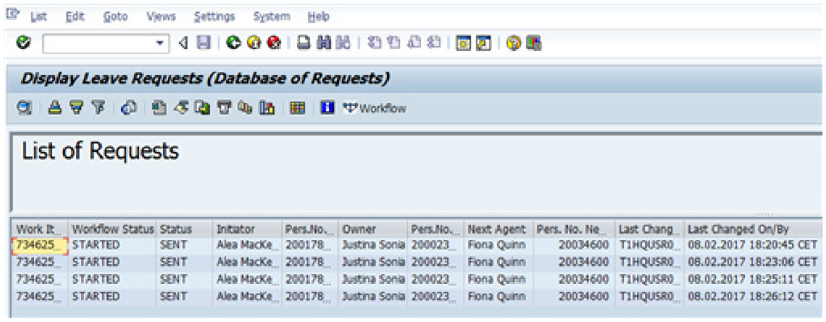
Enter the staff member's personnel number in the Personnel Number text box. [Scenario: 20002312]

For a group of staff members, click and enter the list of personnel numbers.

Click to execute the report.

HR Partner All

Display Leave Requests (Database of Requests)



Work It…	Workflow Status	Status	Initiator	Pers.No.…	Owner	Pers.No.…	Next Agent	Pers. No. Ne…	Last Chang…	Last Changed On/By
734625…	STARTED	SENT	Alea MacKe…	200178…	Justina Sonia	200023…	Fiona Quinn	20034600	T1HQUSR0…	08.02.2017 18:20:45 CET
734625…	STARTED	SENT	Alea MacKe…	200178…	Justina Sonia	200023…	Fiona Quinn	20034600	T1HQUSR0…	08.02.2017 18:23:06 CET
734625…	STARTED	SENT	Alea MacKe…	200178…	Justina Sonia	200023…	Fiona Quinn	20034600	T1HQUSR0…	08.02.2017 18:25:11 CET
734625…	STARTED	SENT	Alea MacKe…	200178…	Justina Sonia	200023…	Fiona Quinn	20034600	T1HQUSR0…	08.02.2017 18:26:12 CET

13. Based on the period and variant that was chosen (i.e. PENDING LEAVE), the system will generate a list of all leave requests created on the Self-Service Portal that require the next-level approval by either a Time Manager, Medical Services or HR Partner.
Along with the staff member's identification, this initial display will show the request's initiator, owner, next responsible agent(s), the date when the record was last changed and by whom. You may scroll to the right of the screen to see the rest of the columns, which describe the document IDs.

Note that the next responsible agent can be one person in a group of responsible agents (i.e., one HR Partner from a group of HR Partners authorized to review the record).

To open a record, double click on an item row to see the details of the leave request.

Click to return to the SAP Easy Access screen.

4.2.2 Monitoring Analysis

For SENT requests:

Run the report to display all pending leave requests. You must review each pending request and follow up with the staff members' approvers (time manager, HR Partner or Medical Services) to ensure that they will take the required actions.

For REJECTED requests:

Run the report again, replacing *SENT* with *REJECTED* in the Document Status field.

In the event that the request is for certified sick leave, you must ensure that there is another absence type request in the system, which can be either uncertified sick leave or AL if the staff member has the necessary balance, or SLWOP or AL. If there isn't, follow up with the staff member and ask which of the these leave types have to be entered in the system.

4.3 Display Absence Quota Information

Scenario

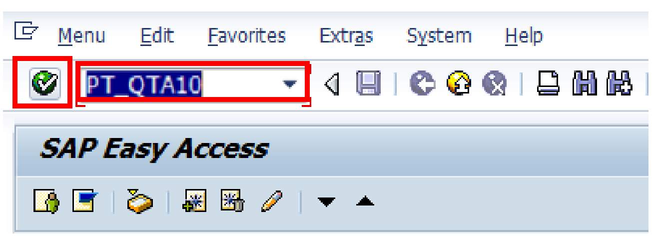
You have received a request to analyse the leave balances/quotas usage for staff members in Advisory Committee on Administrative and Budgetary Questions (ACABQ) to determine what leave has been taken in the current leave cycle.

4.3.1 Monitoring Procedure

Procedure

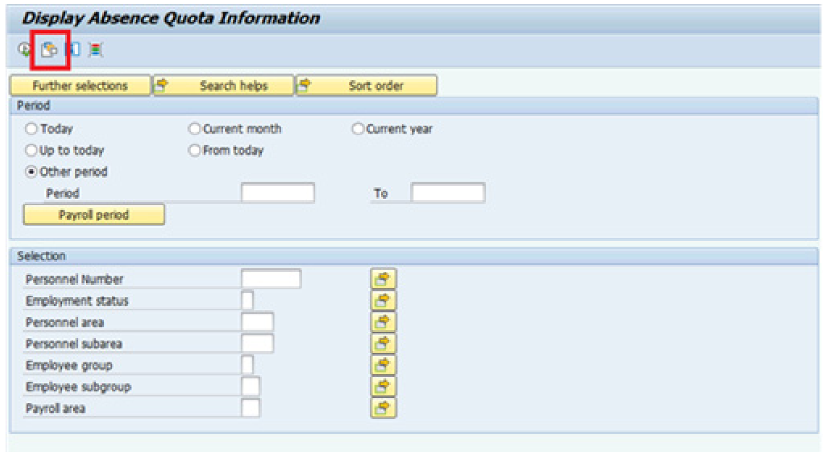
1. Start the transaction using the menu path or transaction code.

SAP Easy Access



2. Click after typing PT_QTA10 in the Command text box.

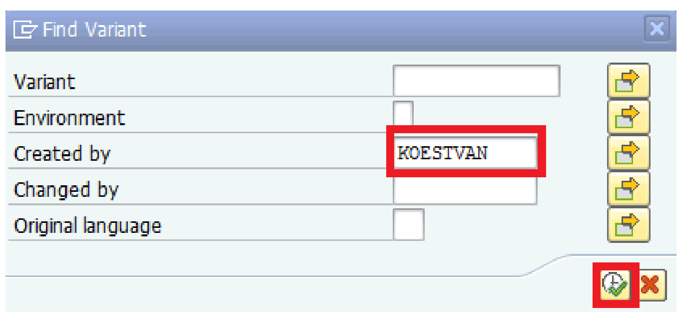
Display Absence Quota Information



3. Organizational unit is not part of the default Selection pane. You can either add Organizational unit to Selection, or use a report variant which has already added it.

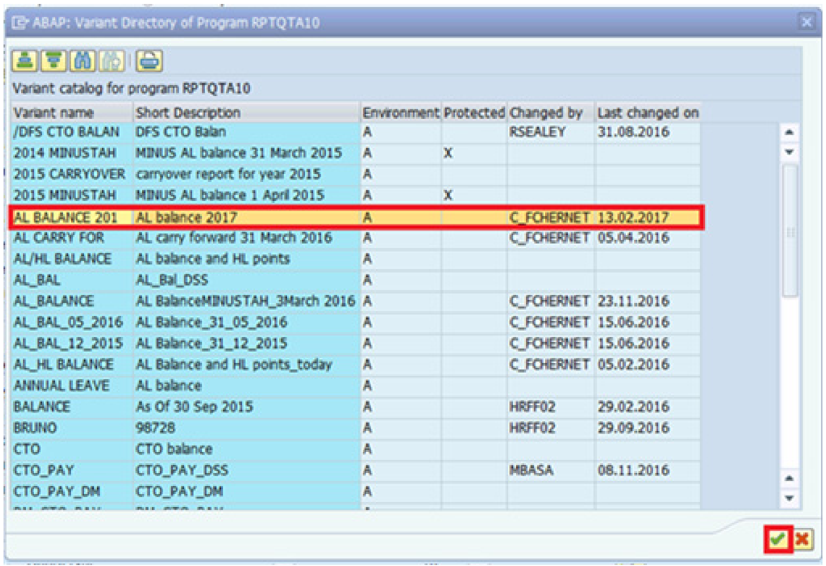
Click to locate the *AL Balance 2017* report variant.

Find Variant



4. By default, the search will look for variants you have created in the past. To locate variants created by others, delete your username from the Created by text box, then click to search all variants.

ABAP: Variant Directory of Program RPTQTA10

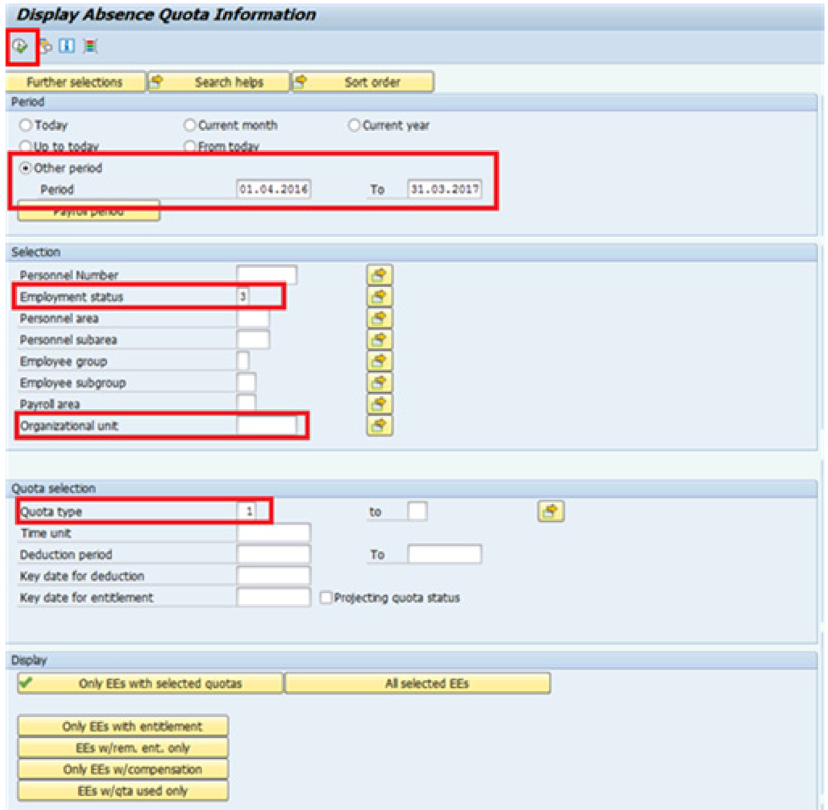


Variant name	Short Description	Environment	Protected	Changed by	Last changed on
/DFS CTO BALAN	DFS CTO Balan	A		RSEALEY	31.08.2016
2014 MINUSTAH	MINUS AL balance 31 March 2015	A	X		
2015 CARRYOVER	carryover report for year 2015	A			
2015 MINUSTAH	MINUS AL balance 1 April 2015	A	X		
AL BALANCE 201	AL balance 2017	A		C_FCHERNET	13.02.2017
AL CARRY FOR	AL carry forward 31 March 2016	A		C_FCHERNET	05.04.2016
AL/HL BALANCE	AL balance and HL points	A			
AL_BAL	AL_Bal_DSS	A			
AL_BALANCE	AL BalanceMINUSTAH_3March 2016	A		C_FCHERNET	23.11.2016
AL_BAL_05_2016	AL Balance_31_05_2016	A		C_FCHERNET	15.06.2016
AL_BAL_12_2015	AL Balance_31_12_2015	A		C_FCHERNET	15.06.2016
AL_HL BALANCE	AL Balance and HL points_today	A		C_FCHERNET	05.02.2016
ANNUAL LEAVE	AL balance	A			
BALANCE	As Of 30 Sep 2015	A		HRFF02	29.02.2016
BRUNO	98728	A		HRFF02	29.09.2016
CTO	CTO balance	A			
CTO_PAY	CTO_PAY_DSS	A		MBASA	08.11.2016
CTO_PAY_DM	CTO_PAY_DM	A			

5. Select the variant named *AL BALANCE 201*.

Click ✅ to confirm selection.

Display Absence Quota Information



6. To expedite running the report, values for the following fields are preset.

Other period: set for the 2016 - 2017 leave cycle

Employment status: set for 3 – Active

Note: Staff members who were active in the period will appear in the report, even if they have since separated from the organization.

As per this scenario, we would like to generate a report showing Annual Leave Quotas for the 2016 – 2017 leave cycle for staff members in the Advisory Committee on Administrative and Budgetary Questions (ACABQ), Department of Management Organizational Unit. The organizational unit is not set as part of the variant, so you can either search for the Organizational unit, or enter the code in the Organizational unit text box. [Scenario: Enter 20000222]

HR Partner All

7. The Quota type is prefilled in this variant for Annual Leave. The full list of leave types includes:

- **01** – Annual Leave
- **02** – Sick leave with Full Pay
- **03** – Uncertified Sick Leave
- **04** – Sick Leave with Half Pay
- **05** – Compensatory Time Off
- **06** – Paternity Leave
- **07** – Compressed Reg Day off
- **08** – Floating Holiday
- **09** – Home Leave Points

Click or press **F8** to execute the report.

Display Absence Quota Information

Absence quotas

Validity period 01.04.2016 - 31.03.2017

Pers.No.	Name (sortable)	AQTyp	Organizational unit	Org. Unit	Position	Quota	Unit	Entitlement	Used	Rem. on key date
200033_	Stewart Vincent	00	ACABQ	200002_	300031_	Annual Leave	Days	75.50000	21.00000	54.50000
200320_	Lilian Ogden	00	ACABQ	200002_	300701_		Days	50.50000	32.00000	18.50000
200364_	Felicity Kerr	00	ACABQ	200002_	300031_		Days	87.00000	38.00000	49.00000
200378_	Berk Porter	00	ACABQ	200002_	300031_		Days	83.50000	70.00000	13.50000
200385_	Molly Martin	00	ACABQ	200002_	300031_		Days	80.50000	32.00000	48.50000
200478_	Hunter Penelope	00	ACABQ	200002_	300327_		Days	7.50000	0.00000	7.50000
200493_	Zia David	00	ACABQ	200002_	300795_		Days	9.00000	3.00000	6.00000
200682_	Luke Hart	00	ACABQ	200002_	300130_		Days	85.50000	18.50000	67.00000
200683_	Ogden William	00	ACABQ	200002_	300130_		Days	83.50000	28.00000	55.50000
200726_	Nomlanga Irene	00	ACABQ	200002_	300327_		Days	87.50000	29.00000	58.50000
200799_	McGrath Connor	00	ACABQ	200002_	300031_		Days	65.00000	28.50000	36.50000
200841_	Megan Avery	00	ACABQ	200002_	300031_		Days	73.50000	29.50000	44.00000
200904_	Felicity Wright	00	ACABQ	200002_	300327_		Days	16.50000	7.00000	0.00000
201053_	Kristen Ursa	00	ACABQ	200002_	300031_		Days	30.50000	23.00000	7.50000
201301_	Carol Ball	00	ACABQ	200002_	300031_		Days	44.50000	28.00000	16.50000
201308_	Samantha Simpson	00	ACABQ	200002_	300031_		Days	87.50000	0.00000	87.50000
201356_	Davies Alexandra	00	ACABQ	200002_	300031_		Days	2.00000	0.00000	2.00000
							Days	969.50000	387.50000	572.50000

8. The report lists staff members and the:

- selected entitlement quotas/accrual as of the selected dates,
- leave usage during the selected dates and
- quota balance as of the selected dates.

Depending on the size of the organization, you may be able to conduct your analysis online, or you may need to export the report results. To export to Excel for further analysis, click on the Local File icon or press CTRL+SHIFT+F9. Follow the instructions to save the exported results as an Excel file on your computer.

4.3.2 Analysis

Review the following items:

1. Staff members that have **NOT** taken annual leave in the 2016 - 2017 cycle.

   Reasons may include:

   a. Staff members who were active during the cycle, but have been separated before the end of the year.

      Indications of this include:

      (i) Position id = '99999999' in the Display Absence Quota Information report and

      (ii) a difference between Entitlement and Rem on key date that does not match the days used [For example, the staff member has an entitlement of 60 days, has used 0 days but has 0 days remaining].

      This can be quickly checked on the staff member's Actions record to see if a Separation PA has been executed.

   b. Staff members who have leave requests pending approval in the system. This can be checked by running the Display Leave Requests Pending Approval report as documented in this guide. Should the staff member have requests pending approval, please contact the staff member's time manager and request that they approve the requests.

   If a staff member has not separated from the organization and does not have requests pending approval in the system, please contact the staff member's time manager to ensure that the staff member's actual absences are being recorded.

   Note: AL quotas will be automatically reset to the maximum entitlement appropriate to the appointment type as of 01.04.2017. Staff members who retroactively post or have absences approved in 2016 and who have had their quotas reset to 60 or 18 days on 1 April will need to request a review of their balance through an iNeed service request.

4.3.3 Resetting the maximum annual leave quota after 1 April

On 1 April of every year staff members with an annual leave balance greater than:

- 60 days for staff members on Fixed-term, Continuing or Permanent Appointments; or
- 18 days for staff members on Temporary Appointments.

will have their quota reset to 60 or 18 days respectively. It is the HR partner/Time Senior Administrator's responsibility to ensure that the system is correctly adjusting the quota after 1 April.

This can be determined by running the Display Absence Quota and filtering on the AL quota to ensure that the entitlement column is not greater than 60 or 18 days. As OHRM is conducting this monitoring activity globally, local checks are a recommended practice, but not required.

If you wish to check that the AL balances have been correctly carried over, we recommend checking in the first week of April [between 03.04.2017 and 07.04.2017].

4.4 Display Accrual of CTO and ND for a Given Staff Member and Date Range

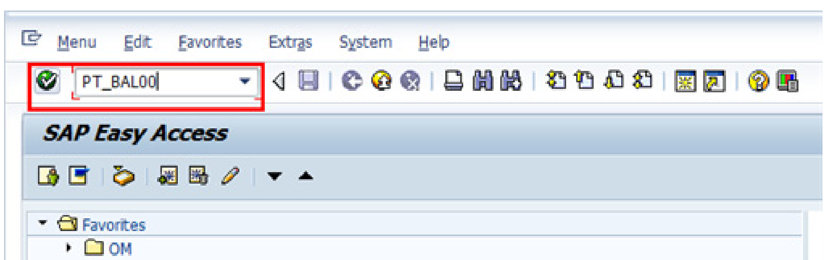
Scenario

You are asked to report on the accrual of hours on night differential and CTO, including those that are embedded as part of the work schedule which will not appear in IT2002 (Attendances), to determine the mount of money due to a given staff member during the month of April 2016.

Procedure

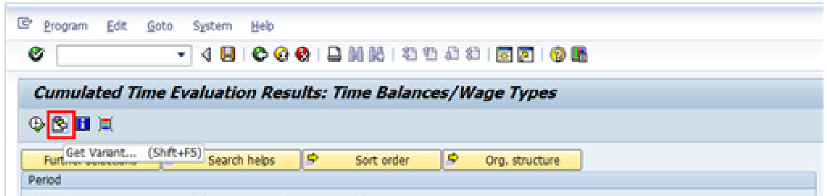
1. Start the transaction using the menu path or transaction code.

SAP Easy Access



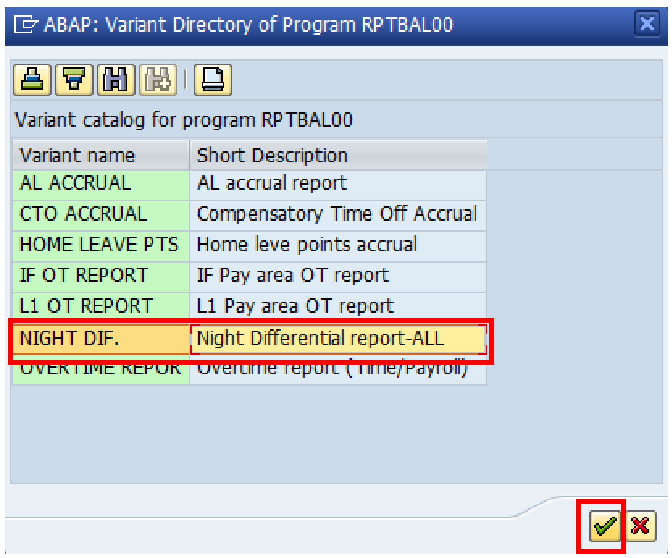
2. Click  after typing PT_BAL00 in the command text box.

Cumulated Time Evaluation Results: Time Balances/Wage Types



3. Click to open the Variant directory.

ABAP: Variant Directory of Program RPTBAL00



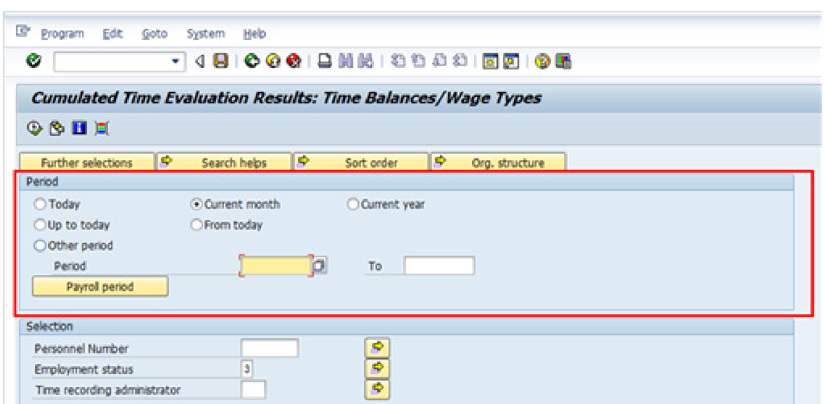
4. From the Variant Directory, select the variant for this report. [Scenario: NIGHT DIF. Night Differential report - ALL]

These report parameters may be applied to an Organizational Unit(s) or an individual staff member. Variant options are:

- **AL ACCRUAL** - used to display the annual leave accrual of a staff member, which is not displayed in detail in infotype 2006 (Absence Quotas)
- **CTO ACCRUAL** - used to display the CTO hours accrued, including those embedded in their work schedule, which do not appear in infotype 2002 (Attendances)
- **HOME LEAVE PTS** - used to display the accrual of Home Leave points
- **IF OT REPORT** - NOT USED
- **L1 OT REPORT** - NOT USED
- **NIGHT DIF.** - used to display the accrual of hours on night differential, including those that are embedded as part of the work schedule which will not appear in IT2002 (Attendances)
- **OVERTIME REPORT** - used to display the overtime accrued by a staff member(s) or Organizational Unit(s)

5. Click to select the variant.

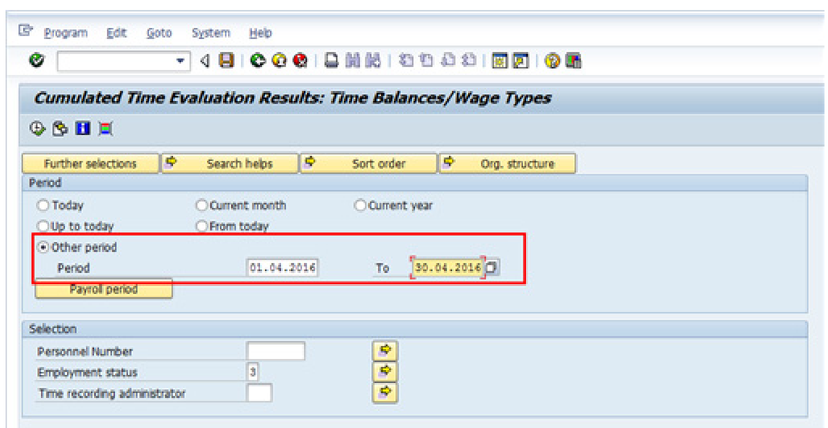
Cumulated Time Evaluation Results: Time Balances/Wage Types



6. In the Period Section a number of options are provided that allow you to select the time period that you would like your report to display. These options are:

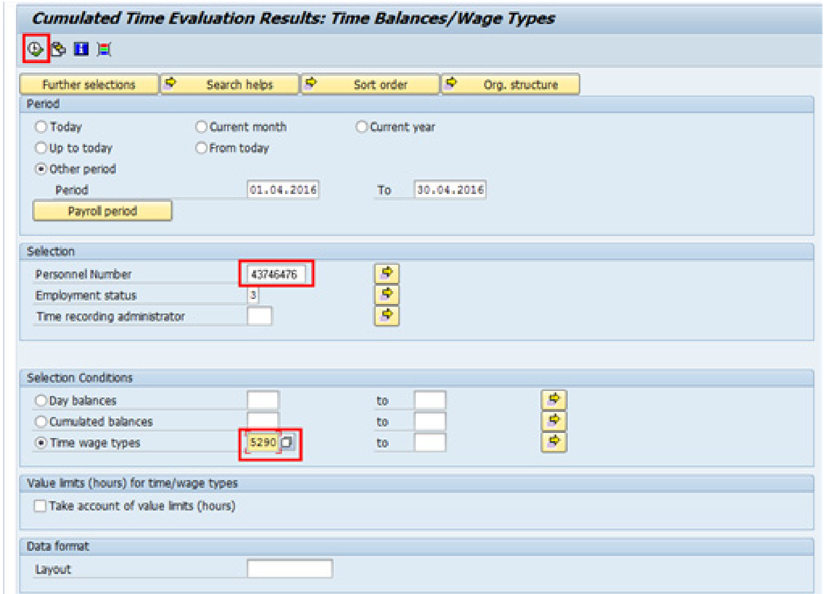
- **Current Month** - used to filter the records by the current month. The system will display a list of staff and their accruals for the current month.
- **Current year** - used to filter the records by the current calendar year. The system will display a list of staff and their accruals for the year.
- **Up to today** - used to filter records from the deployment date up to today but will only show accruals up to the last completed month.
- **Other period** - used to filter the records by the date range you entered. For example, if you enter 01.04.2016 - 30.04.2016 the system will display a list of staff and their accruals between 01.04.2016 through 30.04.2016.
- **Today**, and **From Today** are not to be used for this report.

Cumulated Time Evaluation Results: Time Balances/Wage Types



7. Select 'Other period' and enter a date range. [Scenario: From: 01.04.2016, To: 30.04.2016]

Cumulated Time Evaluation Results: Time Balances/Wage Types

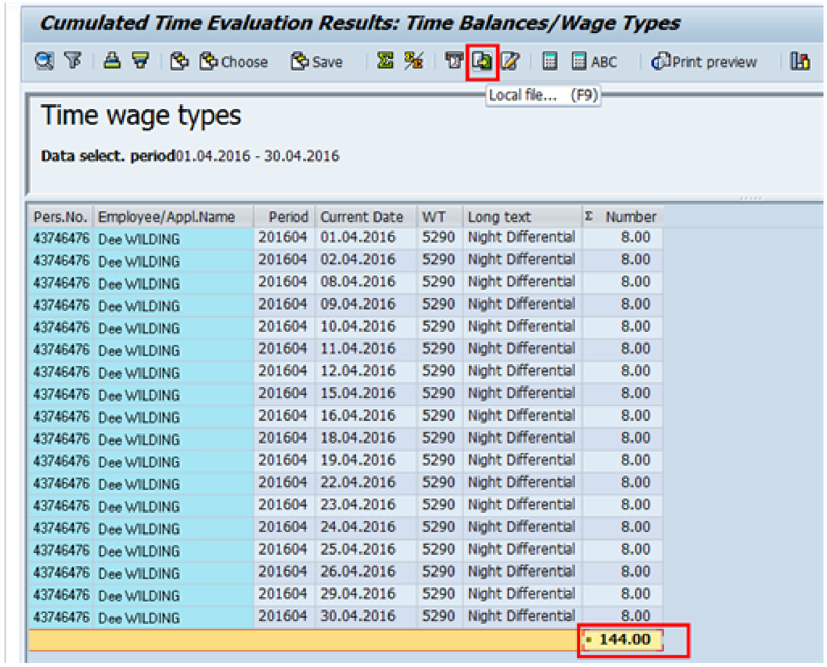


8. In the Selection section enter information about the staff member, in this scenario their Personnel Number will be entered. [Scenario: 43746476]

9. The Time Wage type defaults to the code 5290 (Night Differential), based on the Variant that was chosen for this scenario.

10. Click  to run the report.

Cumulated Time Evaluation Results: Time Balances/Wage Types

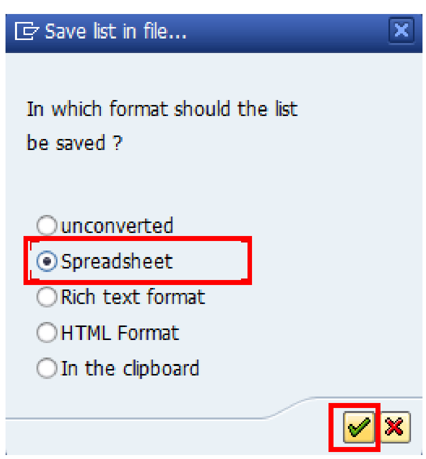


Pers.No.	Employee/Appl.Name	Period	Current Date	WT	Long text	Σ Number
43746476	Dee WILDING	201604	01.04.2016	5290	Night Differential	8.00
43746476	Dee WILDING	201604	02.04.2016	5290	Night Differential	8.00
43746476	Dee WILDING	201604	08.04.2016	5290	Night Differential	8.00
43746476	Dee WILDING	201604	09.04.2016	5290	Night Differential	8.00
43746476	Dee WILDING	201604	10.04.2016	5290	Night Differential	8.00
43746476	Dee WILDING	201604	11.04.2016	5290	Night Differential	8.00
43746476	Dee WILDING	201604	12.04.2016	5290	Night Differential	8.00
43746476	Dee WILDING	201604	15.04.2016	5290	Night Differential	8.00
43746476	Dee WILDING	201604	16.04.2016	5290	Night Differential	8.00
43746476	Dee WILDING	201604	18.04.2016	5290	Night Differential	8.00
43746476	Dee WILDING	201604	19.04.2016	5290	Night Differential	8.00
43746476	Dee WILDING	201604	22.04.2016	5290	Night Differential	8.00
43746476	Dee WILDING	201604	23.04.2016	5290	Night Differential	8.00
43746476	Dee WILDING	201604	24.04.2016	5290	Night Differential	8.00
43746476	Dee WILDING	201604	25.04.2016	5290	Night Differential	8.00
43746476	Dee WILDING	201604	26.04.2016	5290	Night Differential	8.00
43746476	Dee WILDING	201604	29.04.2016	5290	Night Differential	8.00
43746476	Dee WILDING	201604	30.04.2016	5290	Night Differential	8.00
						144.00

11. As per the variant and parameters chosen, you will see that this staff member accrued '144' hours on night differential based on his shift schedule (Scenario: UNSS08FT, HQ SSS 00:8 Fr-Tu .5CT ND or 00:00 to 08:00 Friday-Tuesday, with 0.5 CTO and Night Differential)

12. To export this data to a spreadsheet, click on .

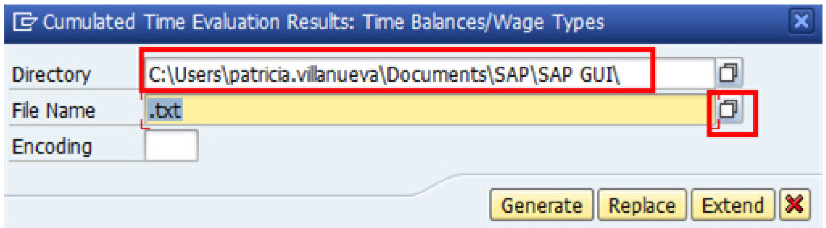
Save list in file...



HR Partner All

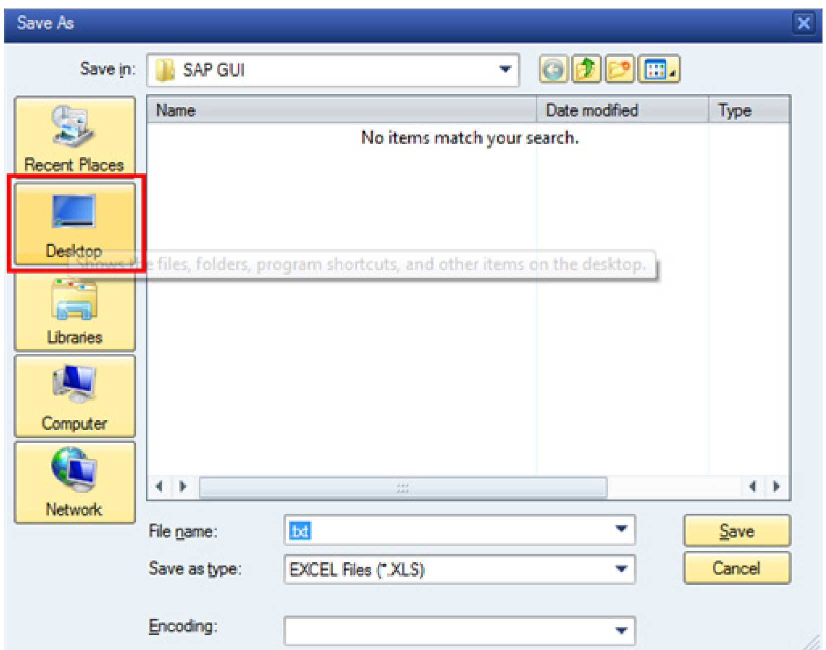
13. Select 'Spreadsheet' and click to continue.

Cumulated Time Evaluation Results: Time Balances/Wage Types

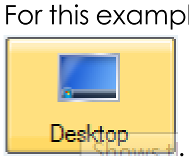


14. In the Directory field designate a location to save the file and in the File Name field click to assign a file name.

Save As

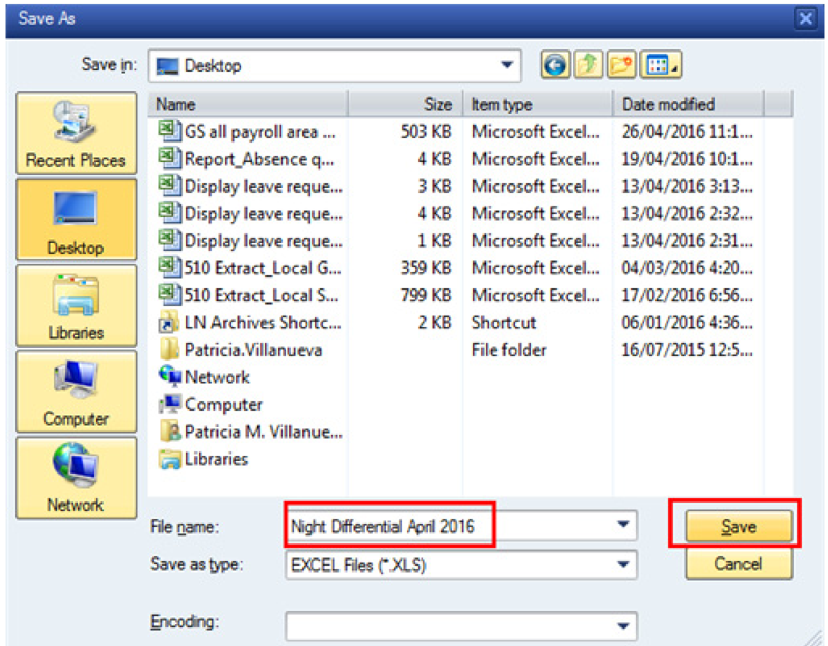


15. For this example, the HR Partner is saving the file to their Desktop. Click



.

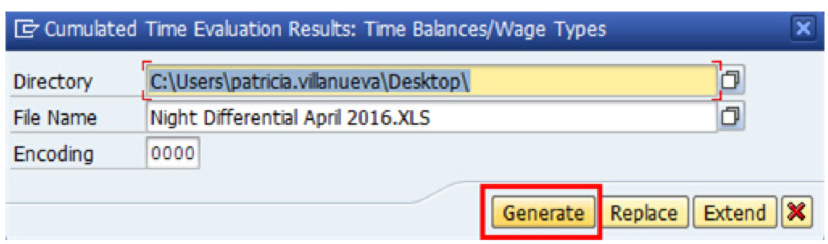
Save As



16. Enter the file name. [Scenario: Night Differential April 2016]

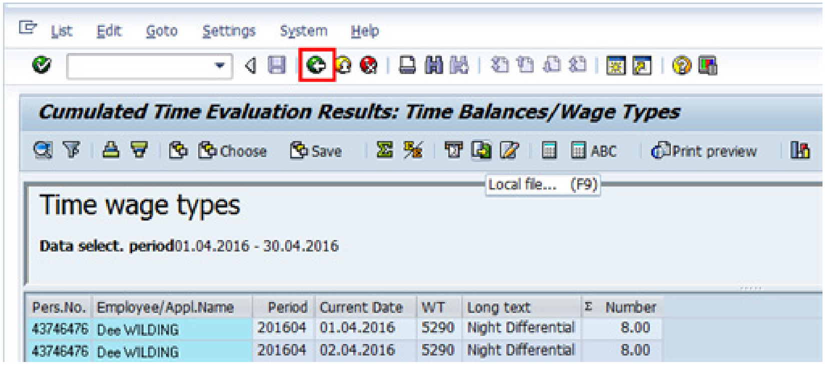
Click Save.

Cumulated Time Evaluation Results: Time Balances/Wage Types



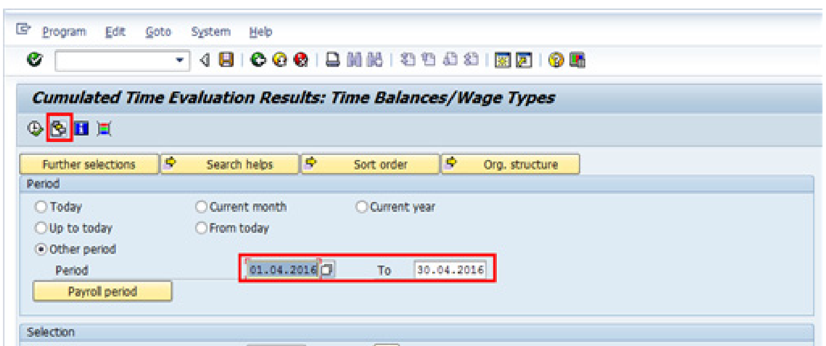
17. Click Generate to create the spreadsheet.

Cumulated Time Evaluation Results: Time Balances/Wage Types



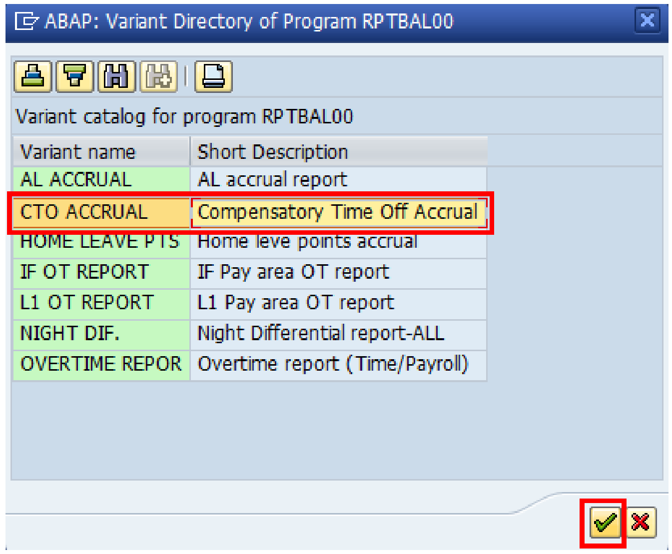
18. Once the spreadsheet is generated, you may check your computer for the file. Meanwhile, return to the report by clicking .

Cumulated Time Evaluation Results: Time Balances/Wage Types



19. As per this scenario, we also want to review the Compensatory Time Off (CTO) accrued by this staff member during the period 01.04.2016 to 30.04.2016. Click to open the Variant directory.

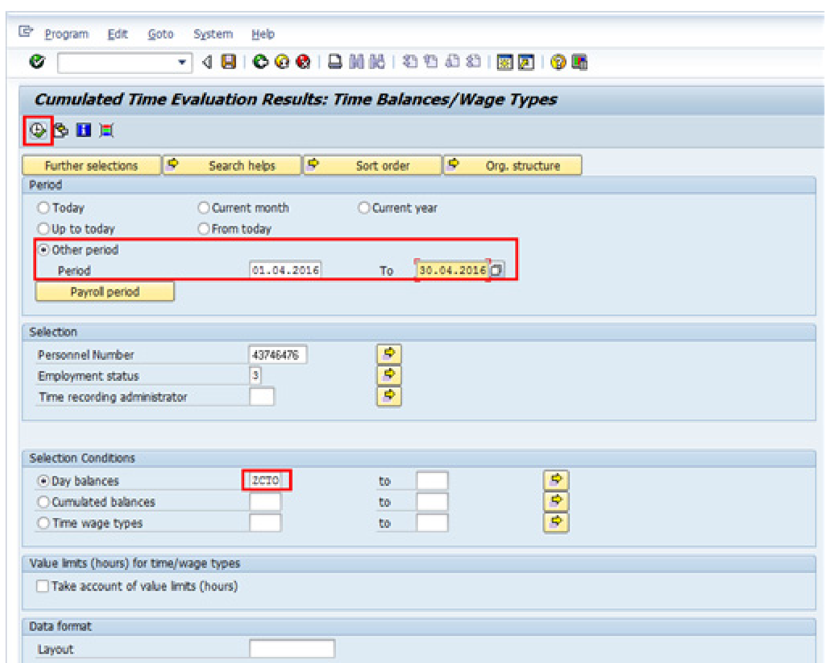
ABAP: Variant Directory of Program RPTBAL00



20. From the Variant Directory, select the variant for this report. [Scenario:CTO ACCRUAL - Compensatory Time Off Accrual]

21. Click ✔ to continue.

Cumulated Time Evaluation Results: Time Balances/Wage Types

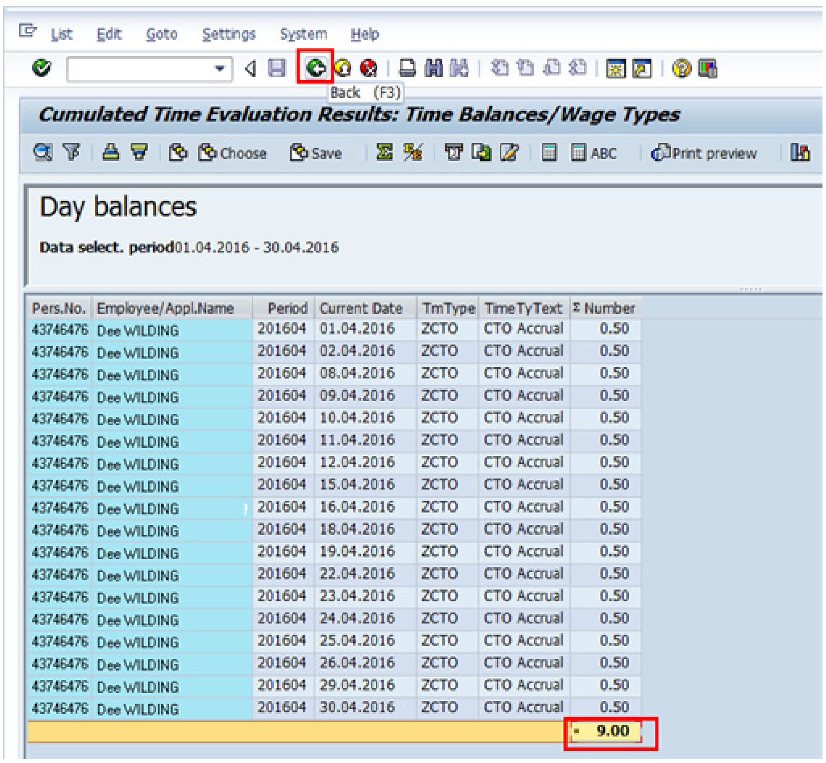


22. The Day Balances code (i.e. ZCTO) is pre-determined by the variant CTO ACCRUAL.

23. Select 'Other period' and enter a date range. [Scenario: From: 01.04.2016, To: 30.04.2016]

24. Click to run the report.

Cumulated Time Evaluation Results: Time Balances/Wage Types

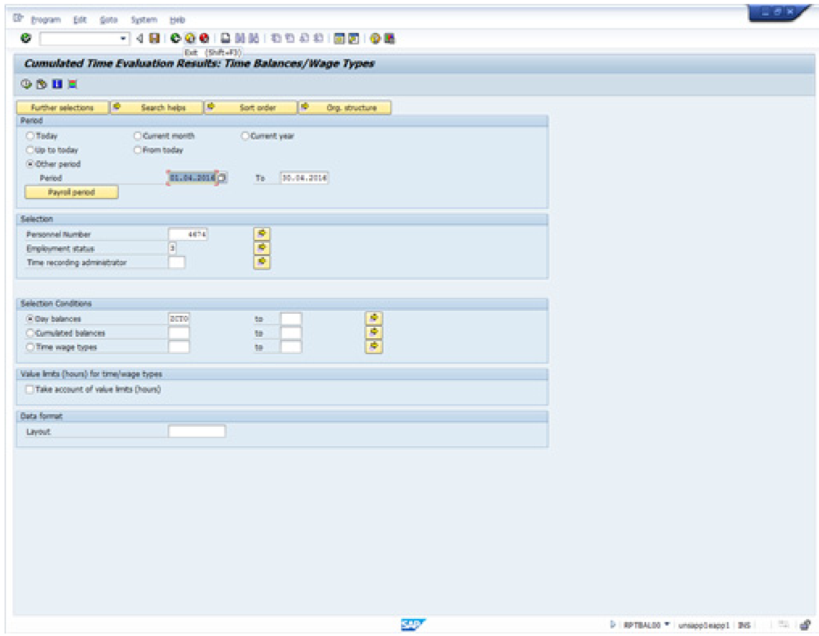


Pers.No.	Employee/Appl.Name	Period	Current Date	TmType	TimeTyText	Σ Number
43746476	Dee WILDING	201604	01.04.2016	ZCTO	CTO Accrual	0.50
43746476	Dee WILDING	201604	02.04.2016	ZCTO	CTO Accrual	0.50
43746476	Dee WILDING	201604	08.04.2016	ZCTO	CTO Accrual	0.50
43746476	Dee WILDING	201604	09.04.2016	ZCTO	CTO Accrual	0.50
43746476	Dee WILDING	201604	10.04.2016	ZCTO	CTO Accrual	0.50
43746476	Dee WILDING	201604	11.04.2016	ZCTO	CTO Accrual	0.50
43746476	Dee WILDING	201604	12.04.2016	ZCTO	CTO Accrual	0.50
43746476	Dee WILDING	201604	15.04.2016	ZCTO	CTO Accrual	0.50
43746476	Dee WILDING	201604	16.04.2016	ZCTO	CTO Accrual	0.50
43746476	Dee WILDING	201604	18.04.2016	ZCTO	CTO Accrual	0.50
43746476	Dee WILDING	201604	19.04.2016	ZCTO	CTO Accrual	0.50
43746476	Dee WILDING	201604	22.04.2016	ZCTO	CTO Accrual	0.50
43746476	Dee WILDING	201604	23.04.2016	ZCTO	CTO Accrual	0.50
43746476	Dee WILDING	201604	24.04.2016	ZCTO	CTO Accrual	0.50
43746476	Dee WILDING	201604	25.04.2016	ZCTO	CTO Accrual	0.50
43746476	Dee WILDING	201604	26.04.2016	ZCTO	CTO Accrual	0.50
43746476	Dee WILDING	201604	29.04.2016	ZCTO	CTO Accrual	0.50
43746476	Dee WILDING	201604	30.04.2016	ZCTO	CTO Accrual	0.50
						• 9.00

25. The system will generate the hours of Compensatory Time accrued for the month chosen, including both those embedded in the staff member's work schedule and any additional hours accrued and entered in IT-2002 (Attendances) during the period specified. For this scenario, the staff member accrued a total of '9.00' hours and we can see they are all part of their work schedule.

26. Click to exit this screen.

Cumulated Time Evaluation Results: Time Balances/Wage Types

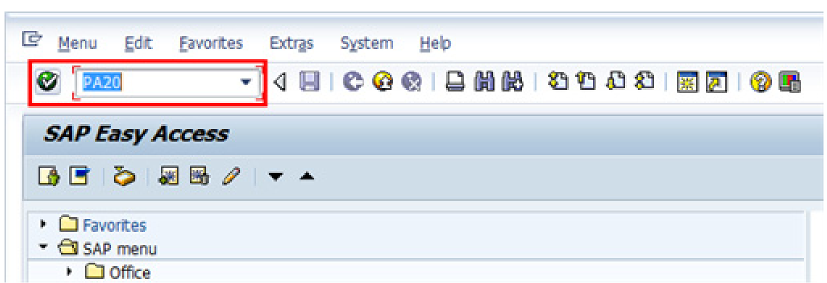


27.

Click [icon] to exit the transaction and return to the Easy Access Menu page.

In this particular example, there does not seem to be additional hours submitted through ESS. In order to verify that this is correct, you may want to review PA20 and query the subtypes for CTO and ND.

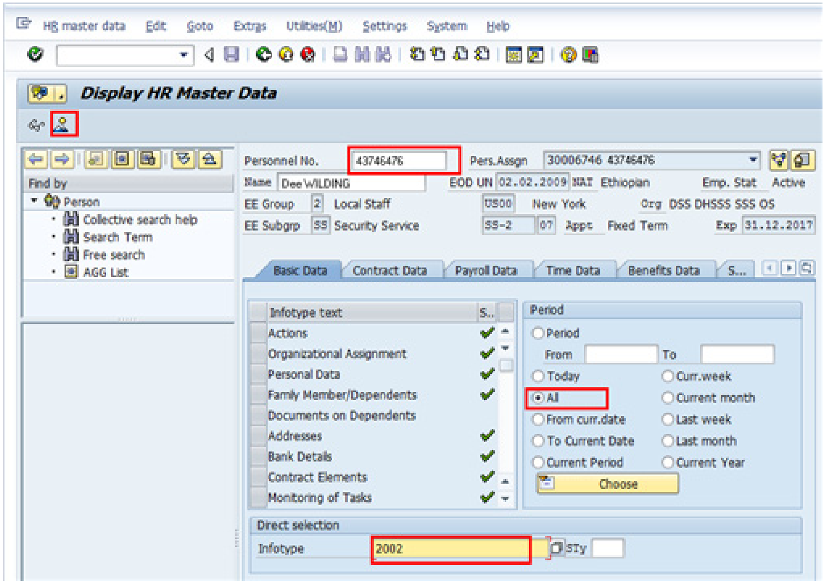
SAP Easy Access



28.

Click [icon] after typing PA20 in the command text box..

Display HR Master Data



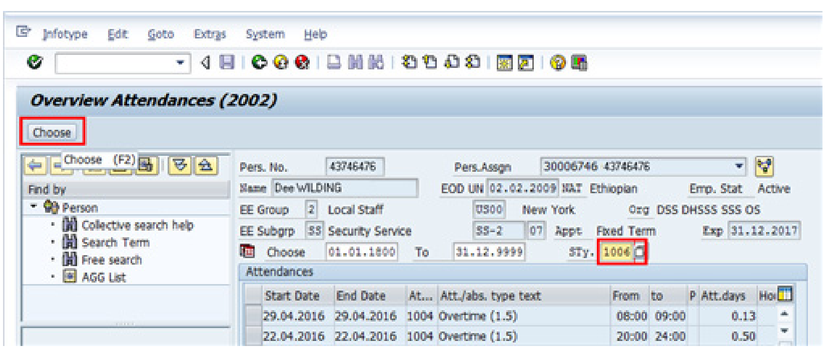
29. Enter the staff member's Personnel No. [Scenario: 43746476]

30. In the Period section, select the All option.

31. In the Infotype field, enter the infotype number. [Scenario: 2002]

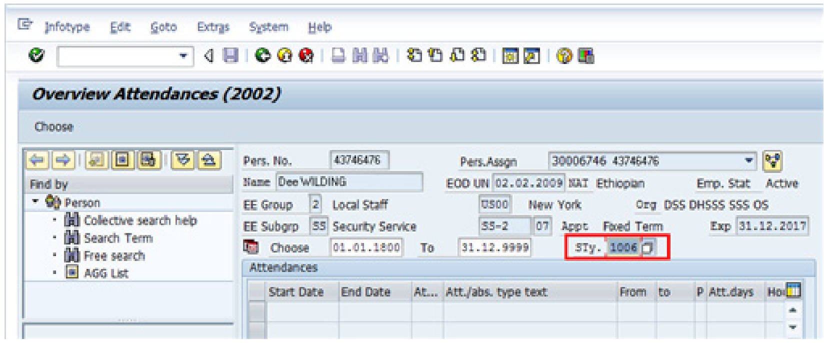
32. Click  to display an overview of the record.

Overview Attendances (2002)



33. In the STy field, enter the subtype [Scenario: 1006] and click Choose.

Overview Attendances (2002)

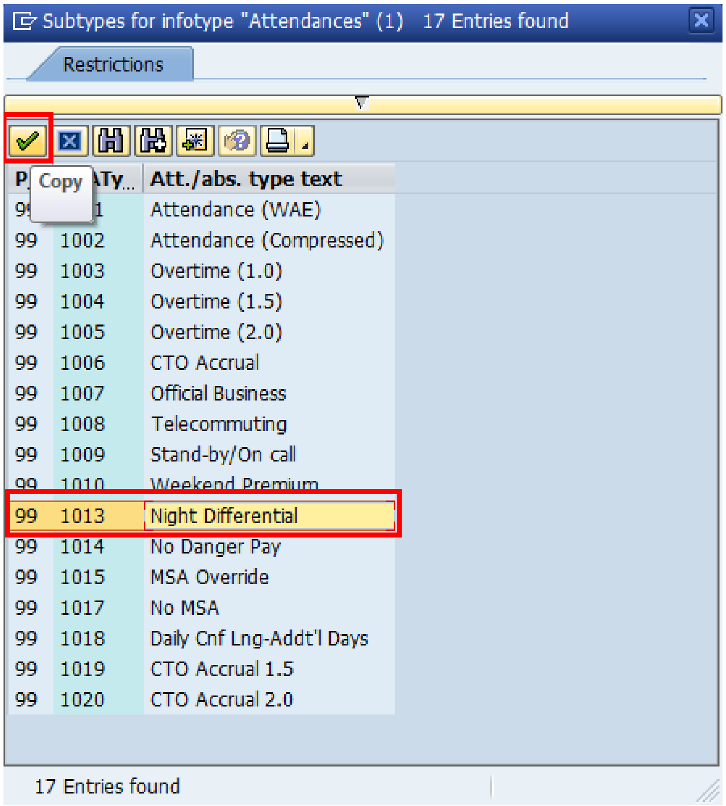


34. As per this scenario, you can see that there was no additional CTO accrued by the staff member outside their work schedule.

Next, we will check whether the staff member accrued any additional Night Differential hours.

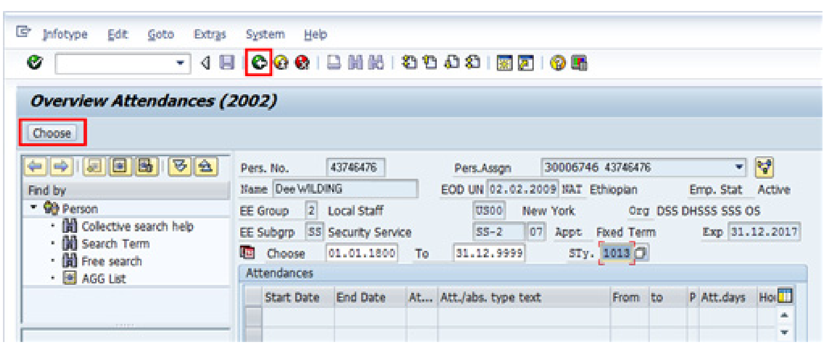
35. Click on the STy field and then click .

Subtypes for infotype "Attendances" (1)   17 Entries found



36. Select '1013 - Night Differential' and click .

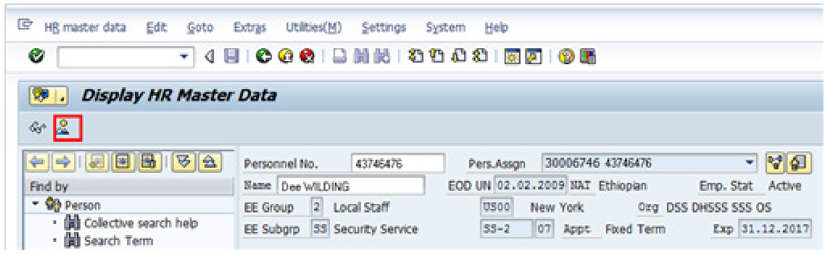
Overview Attendances (2002)



37. As per this scenario, you will see that there were no additional hours accrued on Night Differential outside the staff member's work schedule. Click Choose.

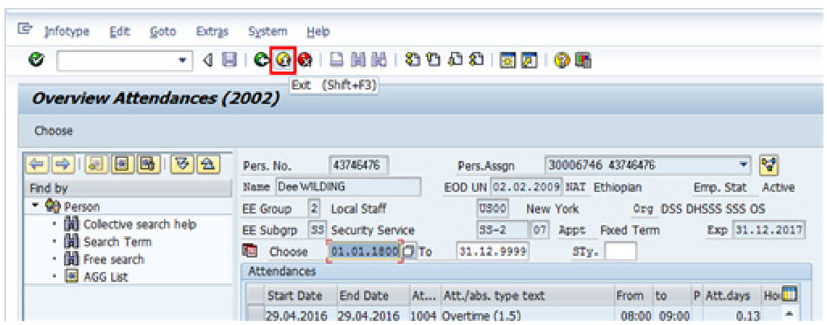
38. Click  to return to the Display HR Master Data page.

Display HR Master Data



39. To exit this T-Code, click .

Overview Attendances (2002)



40. Click  to return to the SAP Easy Access screen.

HR Partner All

5 Payroll Reports

HR Partners have access to Payroll Display to check the system and inform staff members of the status of disbursements resulting from Personnel Actions or transactions the HR Partner may have executed.

Umoja provides a number of pre-defined Payroll reports which can easily be run by users with appropriate access. The HR Partner All role has access to run the following Payroll reports documented in this job aid:

Report	T-Code	Description
Wage Type Reporter	S_PH9_46000172	Use this procedure to verify if an Education Grant advance has been recovered from the staff member's salary.

5.1 Running Reports

You run reports either by entering the report's T-Code in the Command text box, or by navigating the menu tree and selecting the appropriate report.

Each report documented below uses a set of parameters to meet the need of the scenario stated at beginning of each report. Other parameter settings are possible, and you should use settings other than those shown here if your reporting needs are different from those stated in the scenario.

5.1.1 Wage Type Reporter

Use this procedure to verify if an Education Grant advance has been recovered from the staff member's salary.

Scenario

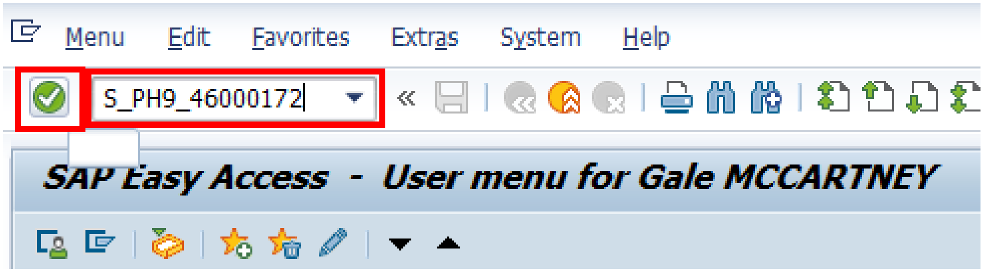
A staff member in receipt of an education grant advance is scheduled for recovery 3 months after the end of the school year, 20 April 2016. The staff member submits a claim for settlement on 5 May 2016.

The HR Partner must determine if a recovery of the advance has already been processed for the month of April 2016.

Procedure

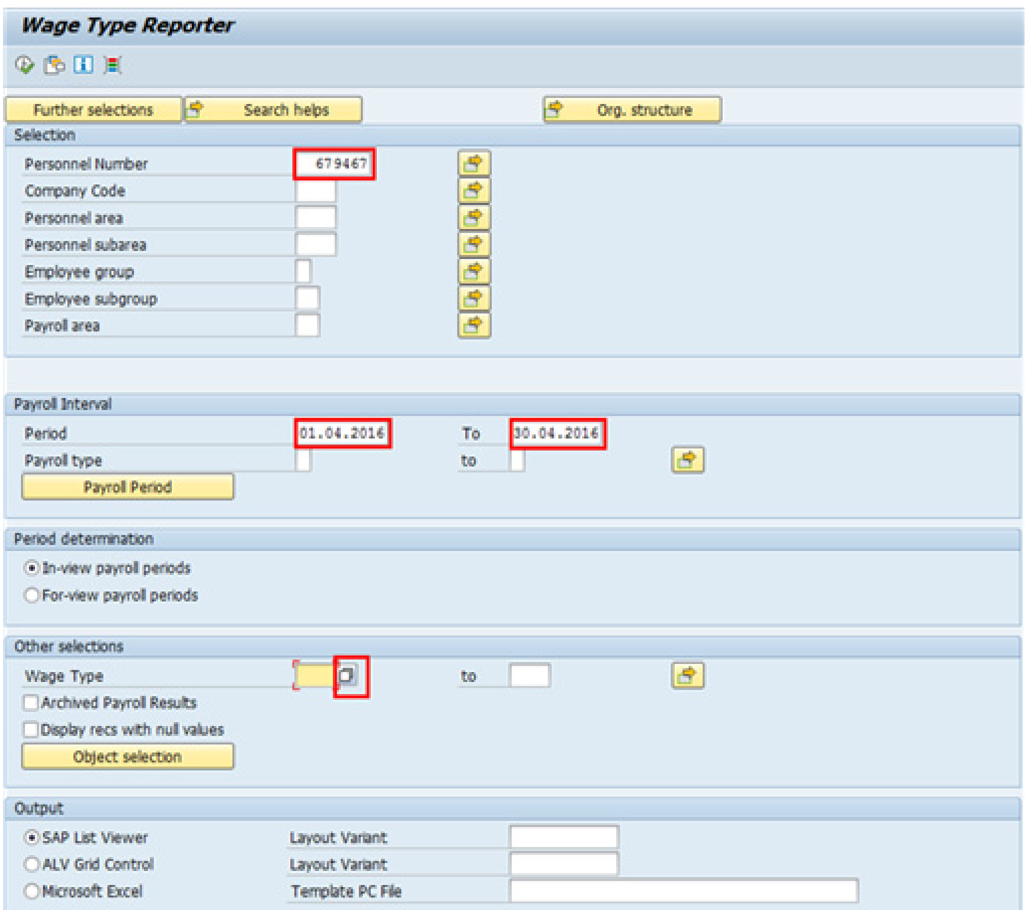
1. Start the transaction using the menu path or transaction code.

SAP Easy Access - User menu for Gale MCCARTNEY



2. Click after typing the T-Code, S_PH9_46000172, in the Command text box.

Wage Type Reporter



3. Enter the staff member's personnel number in the Personnel Number text box. [Scenario: 679467]

In the Period and To text boxes, enter the first and last days of the month for the payroll period you want to search. [Scenario: Period = 01.04.2016, To = 30.04.2016]

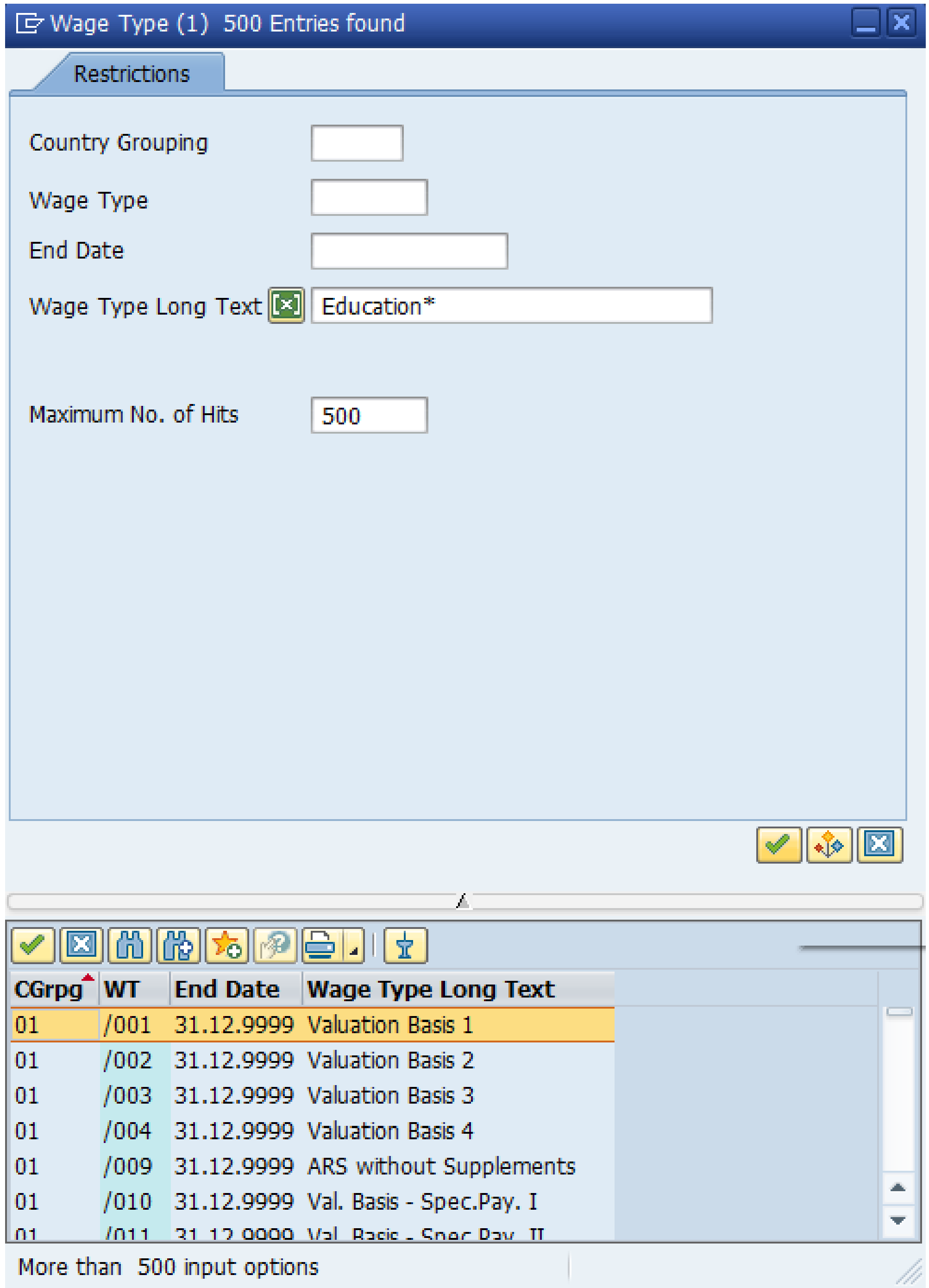
Click  to display the list of options for Wage Type. Or if you know it, type the code in the Wage Type text box.

Wage Type (2) 500 Entries found

CGrpg	WT	End Date	Wage Type Long Text
01	/001	31.12.9999	Valuation Basis 1
01	/002	31.12.9999	Valuation Basis 2
01	/003	31.12.9999	Valuation Basis 3
01	/004	31.12.9999	Valuation Basis 4
01	/009	31.12.9999	ARS without Supplements
01	/010	31.12.9999	Val. Basis - Spec.Pay. I
01	/011	31.12.9999	Val. Basis - Spec.Pay. II
01	/012	31.12.9999	Average of Last 2 Months
01	/013	31.12.9999	Average of Last 3 months
01	/02A	31.12.9999	Frozen Averages
01	/0O1	31.12.9999	Val. Basis 1 for Pub.Sec.
01	/0O2	31.12.9999	Val. Basis 2 for Pub.Sec.
01	/0O3	31.12.9999	Val. Basis 3 for Pub.Sec.
01	/0O4	31.12.9999	Val. Basis 4 for Pub.Sec.
01	/0O5	31.12.9999	Val. Basis 5 for Pub.Sec.
01	/0O8	31.12.9999	Basis for Holiday PS
01	/0OA	31.12.9999	BwG Overtime Gvgt TVOeD
01	/0OB	31.12.9999	BwG Level 4 TVOeD
01	/0OC	31.12.9999	BwG Level 3 TVOeD
01	/0OD	31.12.9999	BwG Overtime Int. TVOeD
01	/0OE	31.12.9999	BwG Night 20% TVOeD
01	/0OF	31.12.9999	BwG Sunday 25% TVOeD
01	/0OG	31.12.9999	BwG Pub.Hol. 135% TVOeD
01	/0OH	31.12.9999	BwG Pub.Hol 35% TVOeD
01	/0OI	31.12.9999	BwG 12/24+31 35% TVOeD
01	/0OJ	31.12.9999	BwG Saturday 20% TVOeD
01	/0OK	31.12.9999	BwG On-Call TVOeD/TVL
01	/0ZM	31.12.9999	Base for Mat.Pay Supplem.
01	/101	31.01.1994	Total Gross Amount

4. To search for a value, click to open the search pane.

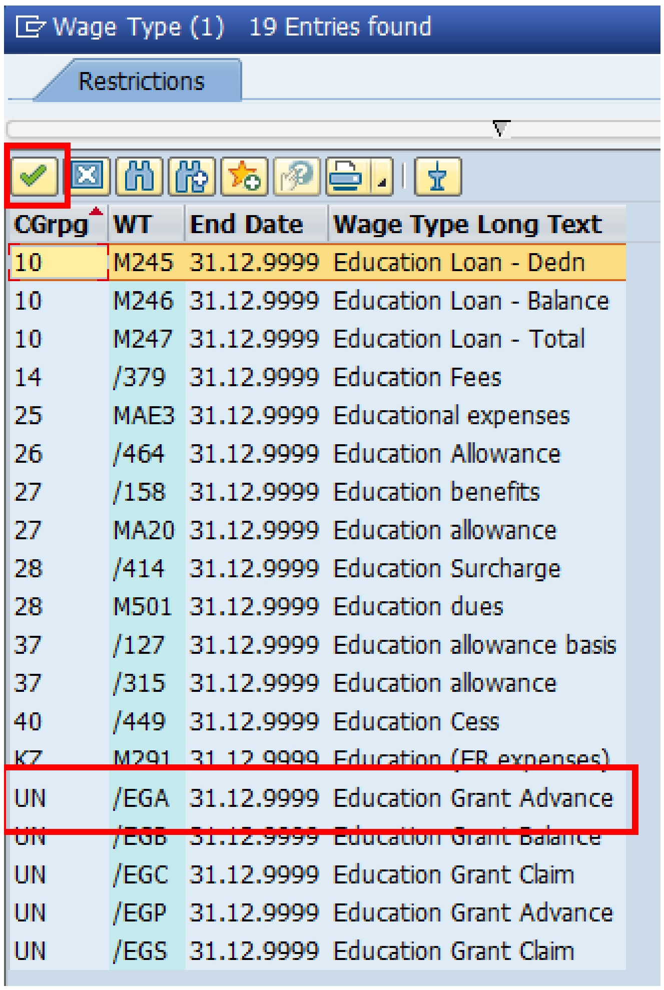
Wage Type (1) 500 Entries found



5. Enter Education* in the Wage Type Long Text field, and click to search.

The asterisk (*) at the end of Education tells Umoja to search for anything that starts with Education and has any other letters after it.

Wage Type (1)   19 Entries found

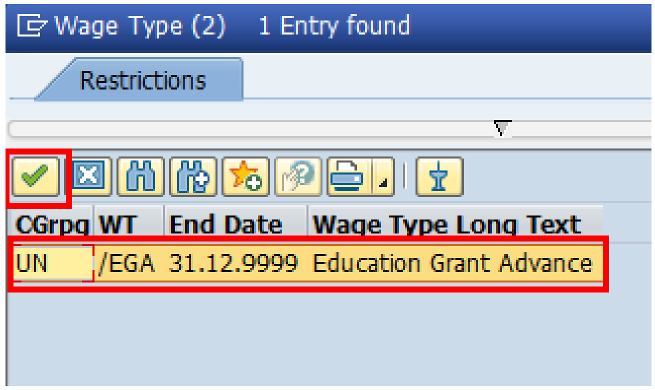


CGrpg	WT	End Date	Wage Type Long Text
10	M245	31.12.9999	Education Loan - Dedn
10	M246	31.12.9999	Education Loan - Balance
10	M247	31.12.9999	Education Loan - Total
14	/379	31.12.9999	Education Fees
25	MAE3	31.12.9999	Educational expenses
26	/464	31.12.9999	Education Allowance
27	/158	31.12.9999	Education benefits
27	MA20	31.12.9999	Education allowance
28	/414	31.12.9999	Education Surcharge
28	M501	31.12.9999	Education dues
37	/127	31.12.9999	Education allowance basis
37	/315	31.12.9999	Education allowance
40	/449	31.12.9999	Education Cess
K7	M291	31.12.9999	Education (ER expenses)
UN	/EGA	31.12.9999	Education Grant Advance
UN	/EGB	31.12.9999	Education Grant Balance
UN	/EGC	31.12.9999	Education Grant Claim
UN	/EGP	31.12.9999	Education Grant Advance
UN	/EGS	31.12.9999	Education Grant Claim

6. Click /EGA to select Education Grant Advance.

7. Click to confirm selection.

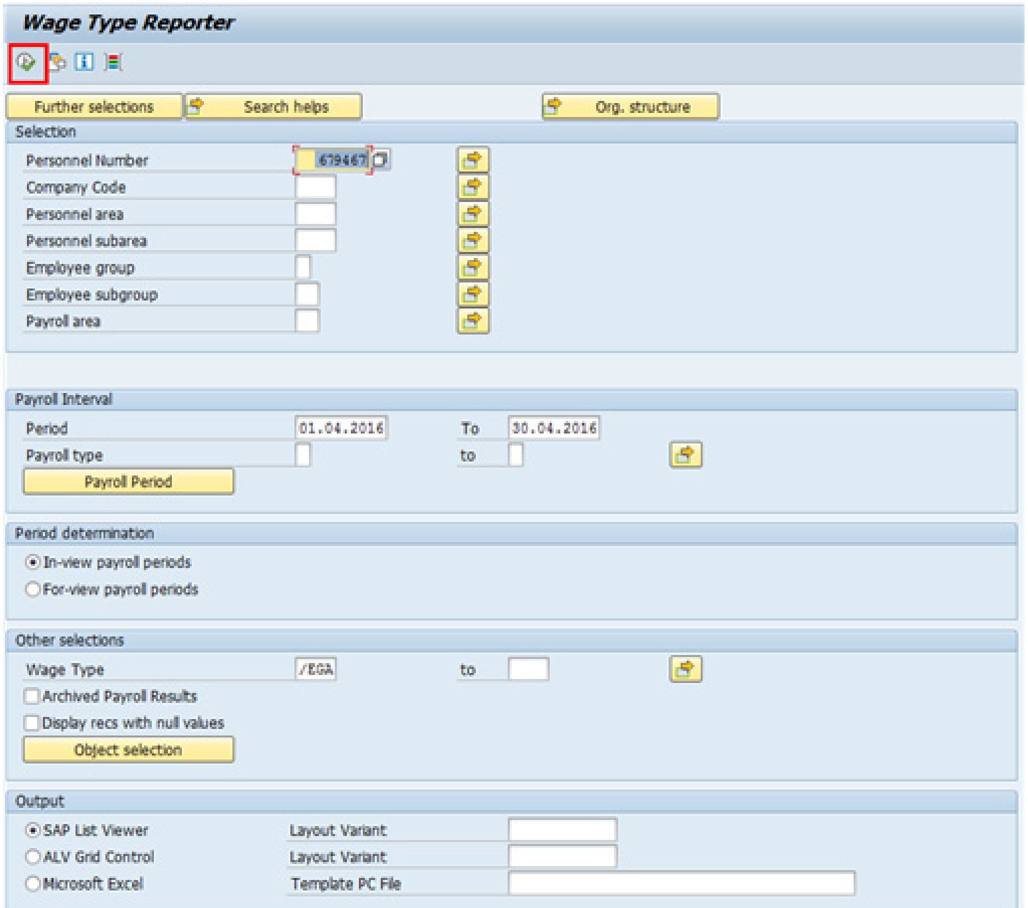
Wage Type (2) 1 Entry found



8. Click Education Grant Advance to select.

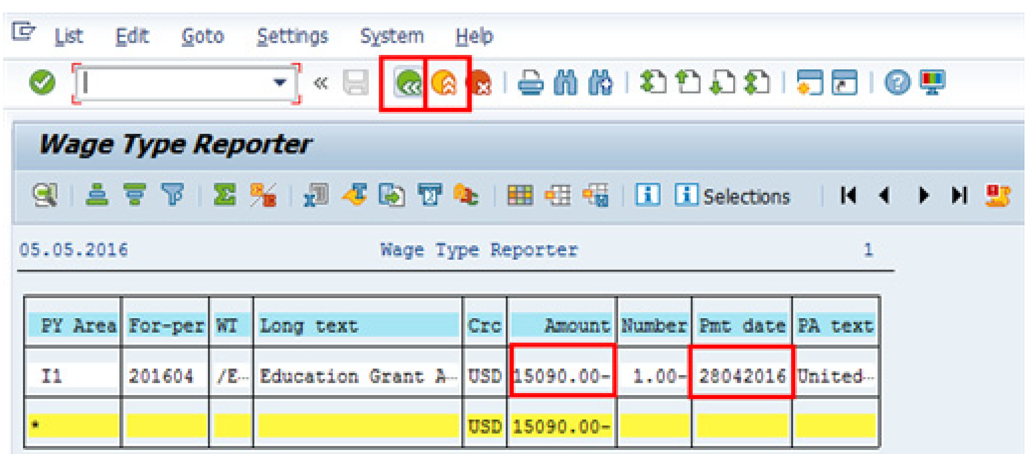
9. Click  to confirm selection.

Wage Type Reporter



10. Click to run the report.

Wage Type Reporter



11. The report shows that 15090.00 was recovered on 28.04.2016.

Click to exit the report.

12. Click to return to the SAP Easy Access screen.

HR Partner All

6 Organizational Management Reports

Umoja provides a number of pre-defined HR reports which can easily be run by users with appropriate access. The HR Partner All role has access to run the following Organizational Management (OM) reports documented in this job aid:

Report	T-Code	Description
Position	ZOMREPORT1	This report lists funding and incumbency information for positions in selected Org Unit(s), with variants to show: • All Positions • Budgetary Vacant Positions • HR Vacant Positions (available in future) • All Positions with a Non-Reimbursable Loan, Reimbursable Loan, or Lien/ Block.
Staffing	ZPA-Staffing	This report produces a staffing table with columns for Org Unit, Position, and Staff Details (excludes vacant positions).
Display Position Information	PO13D	Use this procedure to view detailed position information including • **Relationships:** indicates who currently holds the position, who has a lien on the position, if applicable, and who currently owns the position; • **Cost Distribution:** shows the funding source; and • **UN Position Attributes:** shows the expiration of the position.

6.1 Useful Terms

Budgetary Vacant: A position is budgetary vacant if no costs are being charged to the cost centre(s) funding the position.

HR Vacant: A position is HR vacant if no staff member is assigned to the position, even if the position funding is being used to pay for a temporary assignment. A position is **NOT** HR Vacant if the incumbent or the staff member who has a lien on the position was selected through CRB for that position.

Examples

1. Budgetary vacant, HR non-vacant

   If a staff member is on temporary assignment, and has a lien on their former position, and no other staff member is temporarily assigned to that position, then the position is HR non-vacant (their is a lien on the position), but budgetary vacant (as no funds are being used).

2. Budgetary non-vacant, HR Vacant

   If a staff member has retired from a position which continues to be funded for a number of months after the separation, and the position is used to fund a temporary assignment, the position is HR vacant, but since the funds are being used, it is budgetary non-vacant.

All variants of the Positions report include the following columns.

Position Report Columns

	Column	Definition
Position Identification	Org Unit ID Organizational Unit	ID and Name of the organizational unit to which the position belongs
	Position ID Position Title	ID and Operational title for the position
	Pos. Type ID Pos. Type Name	ID and Name of the position type
	Pos. PS Type	Position Pay Scale Type
	Pos PS Group	Position Pay Scale Group
	Position Start Date	First date on which the position is valid for use
	Position End Date	Last date on which the position is valid for use

Position Report Columns

	Column	Definition
Budgetary Information	APD Start	Start date of the Appropriation Position Duration
	APD End	End date of the Appropriation Position Duration
	UN Pos. Nature ID UN Pos. Nature	Specifies the Contract Status (Expert, Geographical, Language, Limited, Other, Retiree, Retiree - Language)
	Pos. Job ID	Budgetary title for the position
	Cost Ctr ID Cost Centre	Cost Centre ID and Name: Identifies the areas of ongoing cost responsibility for the position, within the overall organizational structure
	Internal Order Name Internal Order Description	Collects costs and revenues of a specific event or simple project that has defined start and end dates, is usually temporary (unique) in nature and where costs should be segregated from other events or on-going operations to enable more detailed monitoring.
	WBS Element Work Breakdown Structure Element	WBSE (Work Breakdown Structure Element): Represents a project with its structure (Covered in the Umoja Project Management courses).
	Fund ID Fund	Source of budget (e.g., United Nations General Fund, PK Fund OLA - UNIFIL, etc.)
	Functional Area ID Functional Area	Programatic view of funding (e.g., UNAMID Peace Process, PKM Finance, etc.)
	Pct.	Percentage the position is funded by the listed source. If the position is funded by more than one source, there will be one line in the report for each funding source for the position.

Position Report Columns

	Column	Definition
Position Characteristics	Vacancy	Indicates if the position is HR Vacant or Budgetary Vacant. **Note:** Currently the HR Vacant indicator is not being used in Umoja and not providing a real picture of the status of the positions.
	Pos. PS Type	Position Pay Scale Type
	Pos PS Group	Position Pay Scale Group
	Duty Station ID Duty Station	ID and name of duty station to which the position is currently assigned
	Master Cost Centre ID Master Cost Centre	ID and Name of the master cost centre from which the position is funded
	Employee Group	Position employee group (e.g., International, Local, etc.)
	Employee Sub-Group	Position employee sub-group (e.g., Professional, General Services, etc.)
Loaned Staff Member information	Loan Type	Indicates if the position has a Non-refundable, Refundable, or Block/Lien
	Loan Begin	Start date of the loan
	Loan End	End date of the loan
	Loan Org. Unit Loan Org. Unit Name	Organizational unit ID and Name to which the previous incumbent was loaned
	Begin Date of Block/Lien Relationship	Start date of the lien on this position
	End Date of Block/Lien Relationship	End date of lien on this position
	Index Number of Block/Lien	Index number (Personnel number) of the staff member who has a lien on the position
	B/L Last Name	Last name of the staff member who has a lien on the position
	B/L First Name	First name of the staff member who has a lien on the position

Position Report Columns

	Column	Definition
Current Position Incumbent Information	Pers. No.	Personnel number of the staff member currently assigned to the position
	Last Name	Last name of the staff member currently assigned to the position
	First Name	First name of the staff member currently assigned to the position
	Gender	Gender of the staff member currently assigned to the position
	Nationality	Nationality of the staff member currently assigned to the position
	UNS EOD	EOD of the staff member currently assigned to the position
	Appt. Exp.	Expiration date of appointment for the staff member currently assigned to the position
	Retirement Date	Retirement date of the staff member currently assigned to the position
	Contract Type	Type of contract (Fixed-Term, Temporary, etc.) for the staff member currently assigned to the position
	Contract Status	Specifies the Contract Status (Expert, Geographical, Language, Limited, Other, Retiree, Retiree - Language)
	Assign Type	Assignment type of appointment held by the staff member currently assigned to the position
	SM PS Type	Pay Scale (G-6, P4, etc.) of the staff member currently assigned to the position
	SM PS Level	Pay Scale Level (01, 04, etc.) (G-6, P4, etc.) of the staff member currently assigned to the position
	Recruitment Indicator	X indicates if the staff member was entitled to travel
	Birth Date	Birth Date (G-6, P4, etc.) of the staff member currently assigned to the position
	Lien Pos. ID	ID of the position on which the current incumbent of the position this line represents has a lien
	Lien Start	Start date of the lien held by the incumbent of the position represented by this line
	Lien End	End date of the lien held by the incumbent of the position represented by this line
	Lien Org. Unit ID	ID of the organizational unit to which the lien on the position belongs

6.2 Running Reports

You run reports either by entering the report's T-Code in the Command text box, or by navigating the menu tree and selecting the appropriate report.

Each report documented below uses a set of parameters to meet the need of the scenario stated at beginning of each report section. Other parameter settings are possible, and you should use settings other than those shown here if your reporting needs are different from those stated in the scenario.

Use the following procedures to run a:

- 6.2.1 Position Report
- 6.2.2 Staffing Report
- 6.2.3 Display Position Information

6.2.1 Position Report

New Content

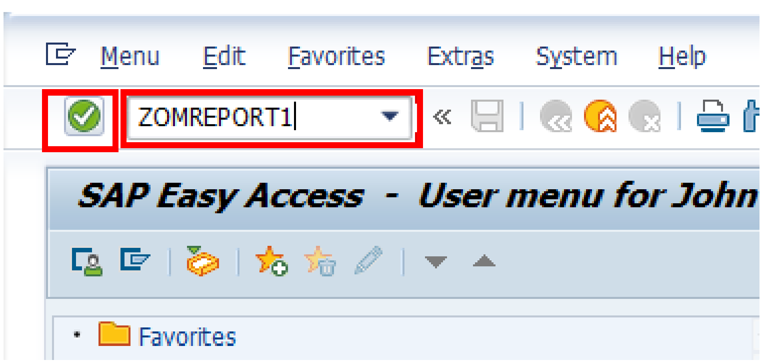
Scenario

A report is needed listing all budgetary vacant positions in ECA as of 07.03.2016.

Procedure

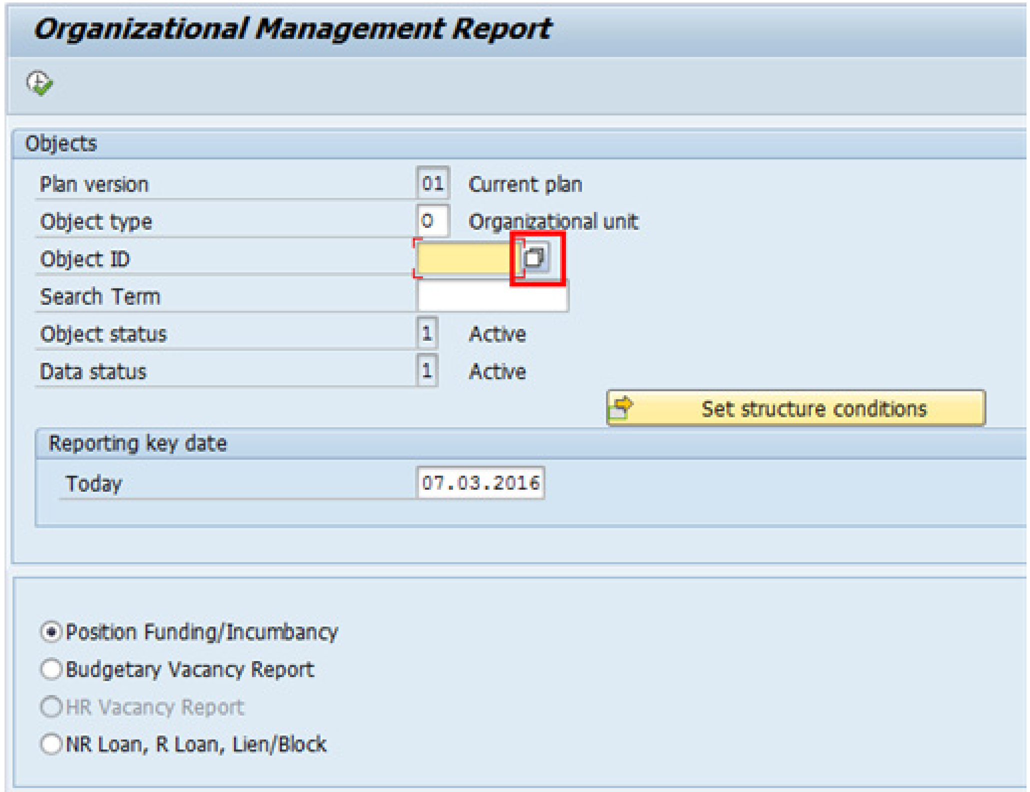
1. Use the menu path to navigate to Human Resources > Organizational Management > Info System > Position and double-click ZOMREPORT1.

SAP Easy Access - User menu for John HALLER



2. Alternatively, click after typing ZOMREPORT1 in the Command text box.

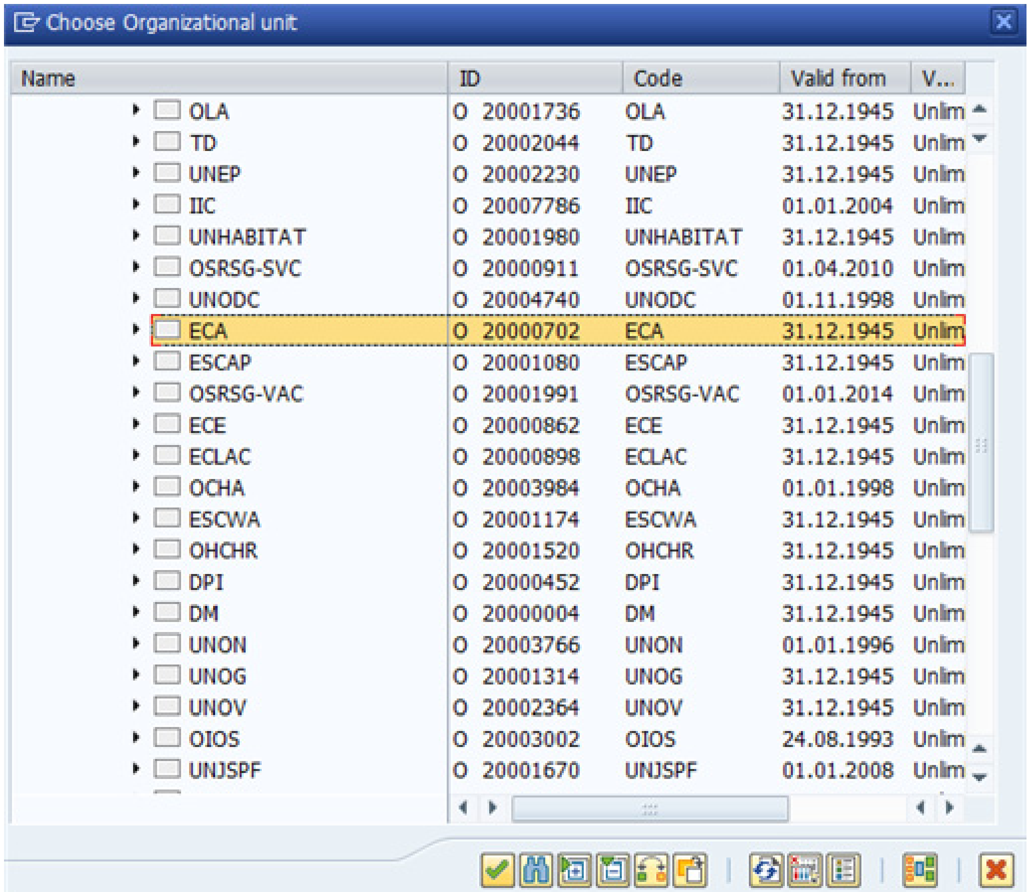
Organizational Management Report



3. The report is preset to base the results on the Current Plan, and set to be based on the selection of Organizational Unit(s).

Click to limit the report results to selected Organizational Unit(s).

Choose Organizational unit

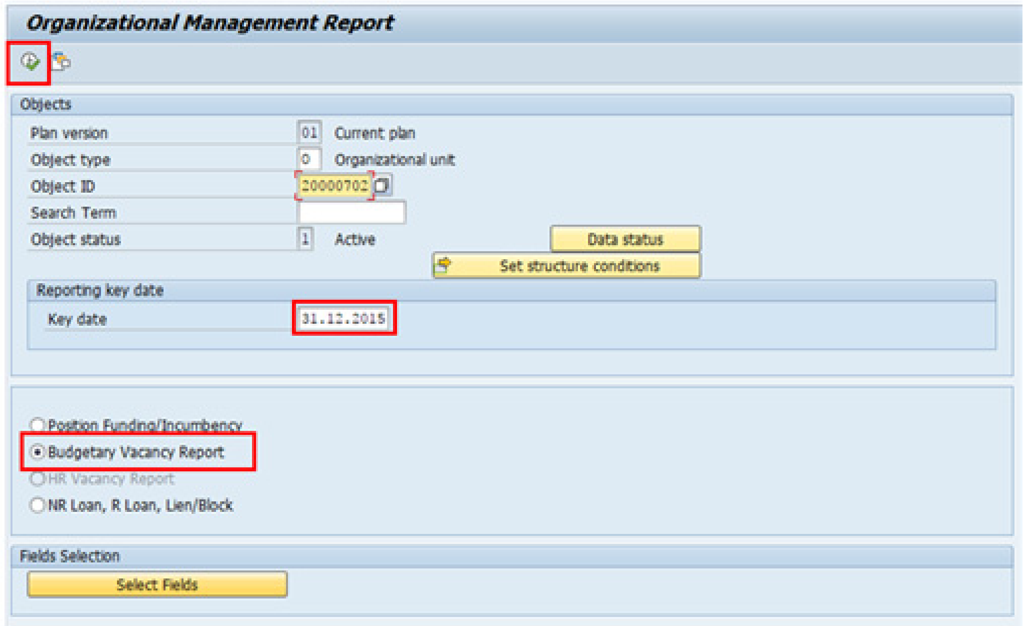


4. Navigate the structure tree by clicking on listings to expand the subtree for that listing. Scroll and continue to expand listings to locate the Organizational Unit you are looking for. [Scenario: UNCS > UNS > ECA]

The report will include all subtree listing for the selected line. In this example, selecting ECA, will include all subtree items under ECA.

Click  to confirm selection.

Organizational Management Report



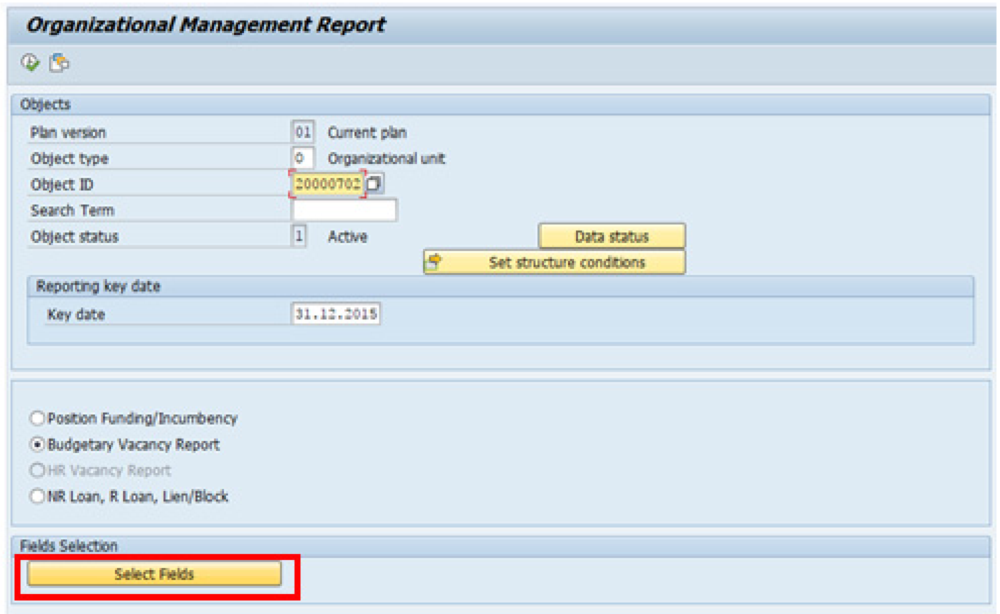
5. Enter or select the date for the report. The report will present position information as of the date specified.

Select the version of the report.

- **Position Funding/Incumbency:** All positions for the selected Organizational Unit(s)
- **Budgetary Vacancy Report:** All Budgetary Vacant positions for the selected Organizational Unit(s)
- **HR Vacancy Report:** All HR Vacant positions for the selected Organizational Unit(s). Not available at this time.
- **NR Loan, R Loan, Lien/Block:** All positions with a Non-Reimbursable Loan, Reimbursable Loan, or Lien Block for the selected Organizational Unit(s)

In this example, the the Vacancy report is selected by clicking ◉ Budgetary Vacancy Report .

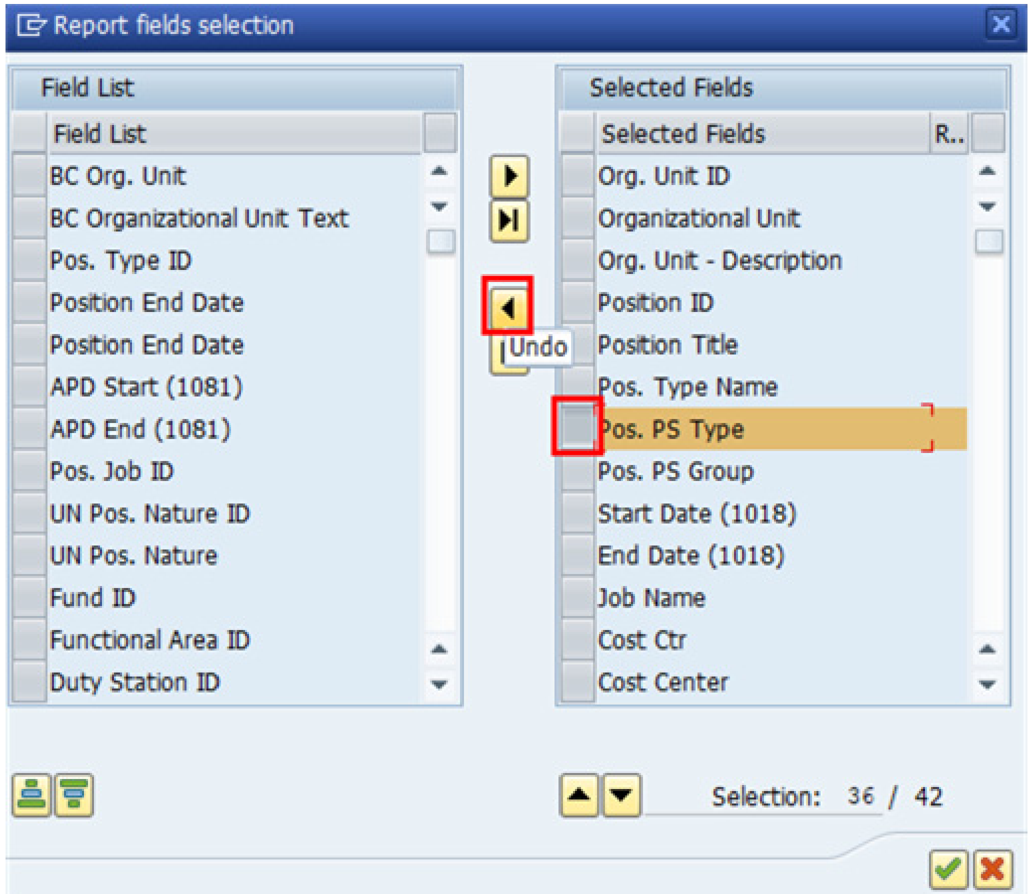
Organizational Management Report



6. You can select which columns (fields) of information you want included in the report.

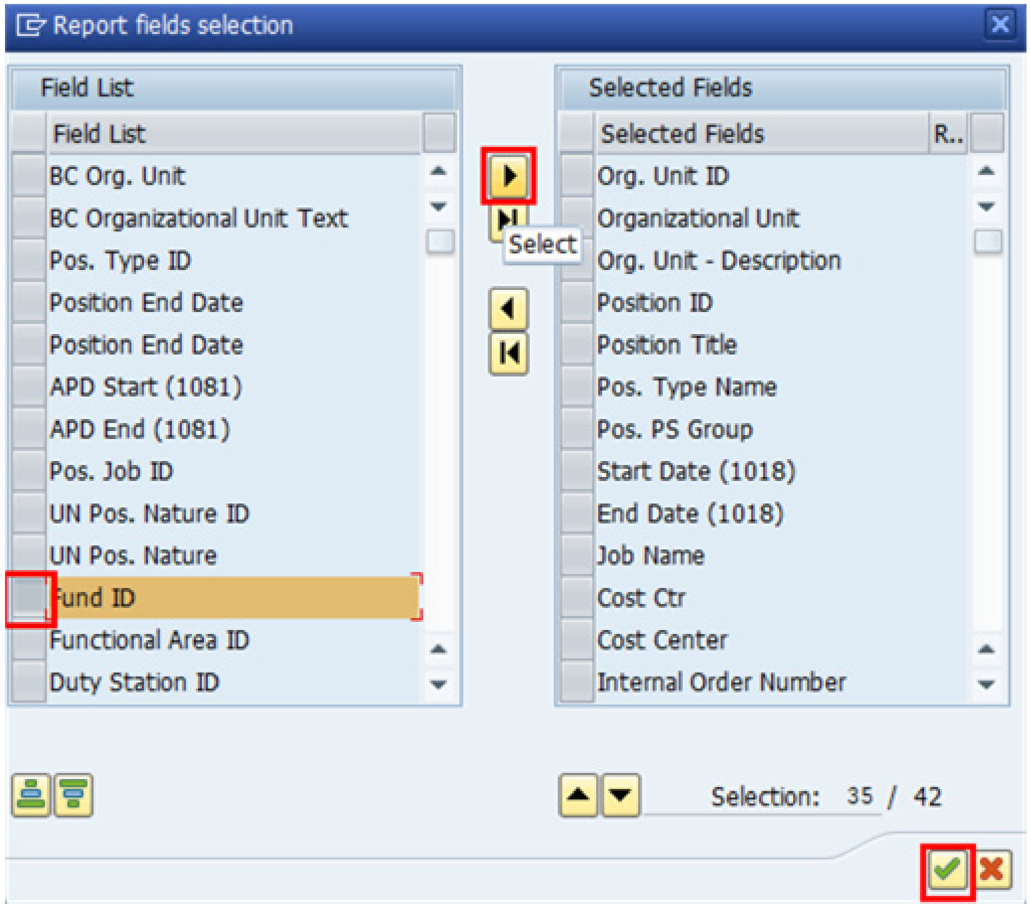
Click Select Fields.

Organizational Management Report



7. A predetermined set of columns are listed under Selected Fields on the right. You can scroll through this list and select any item you do not want included in the report, then click to move the selected item to the Fields list side. This field will not show up in the report.

Organizational Management Report

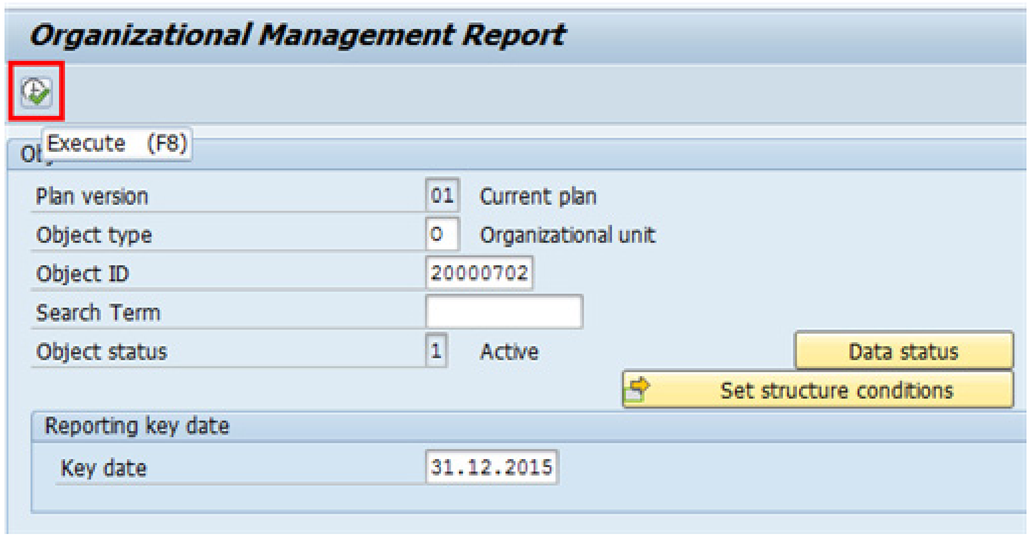


8. Similarly, you may want to add fields to the Selected Fields list. Scroll through the Field list, select a field, and click to add it to the Selected Fields side.

Once you have set up the list of Selected Fields the way you want, click to confirm.

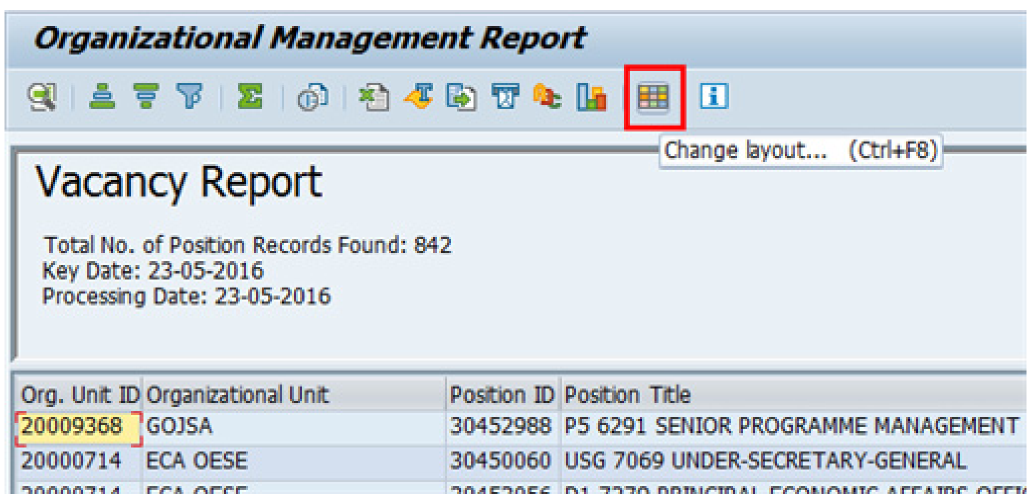
Note: Limiting the list of Selected Fields to the smallest number you need not only makes the end report easier to read and work with, it also speeds up the initial execution of the report.

Organizational Management Report



9. Click to run the report.

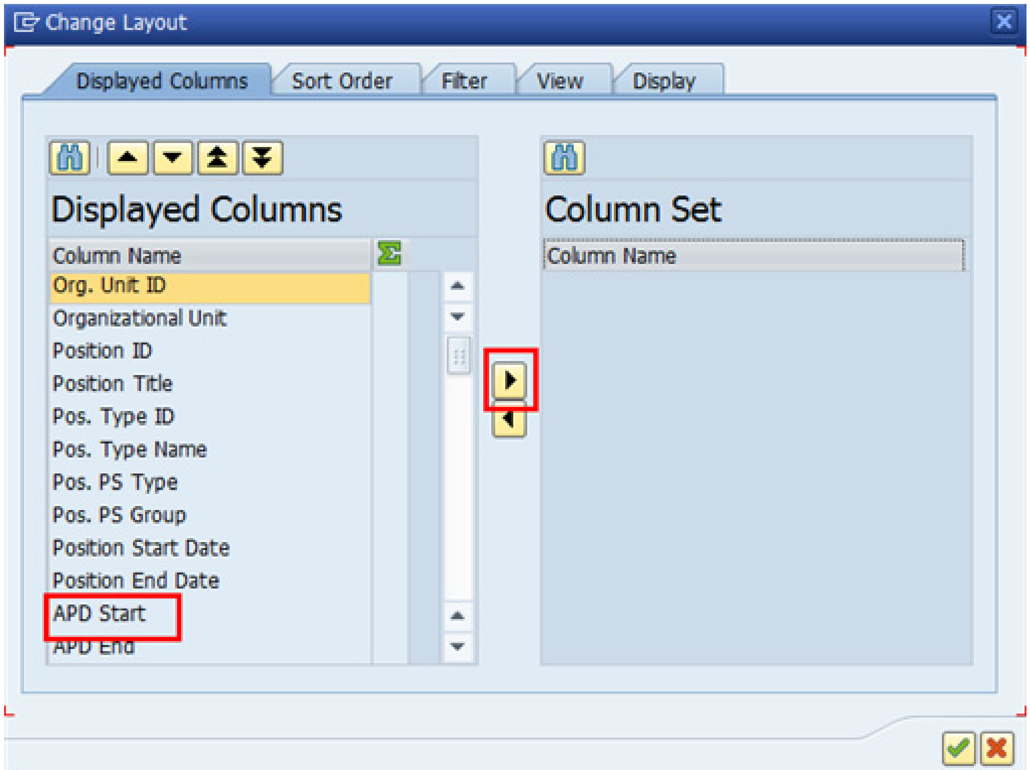
Organizational Management Report



10. All versions of the Organizational management Report include many columns of information. You can reduce the number of columns displayed and available for export to excel.

Click to select columns to exclude from the report.

Change Layout



11. The column on the left lists all the report columns displayed in the report. The column on the right lists those report columns that are excluded. Currently no columns are excluded.

For illustration purposes, APD Start and APD End will be excluded.

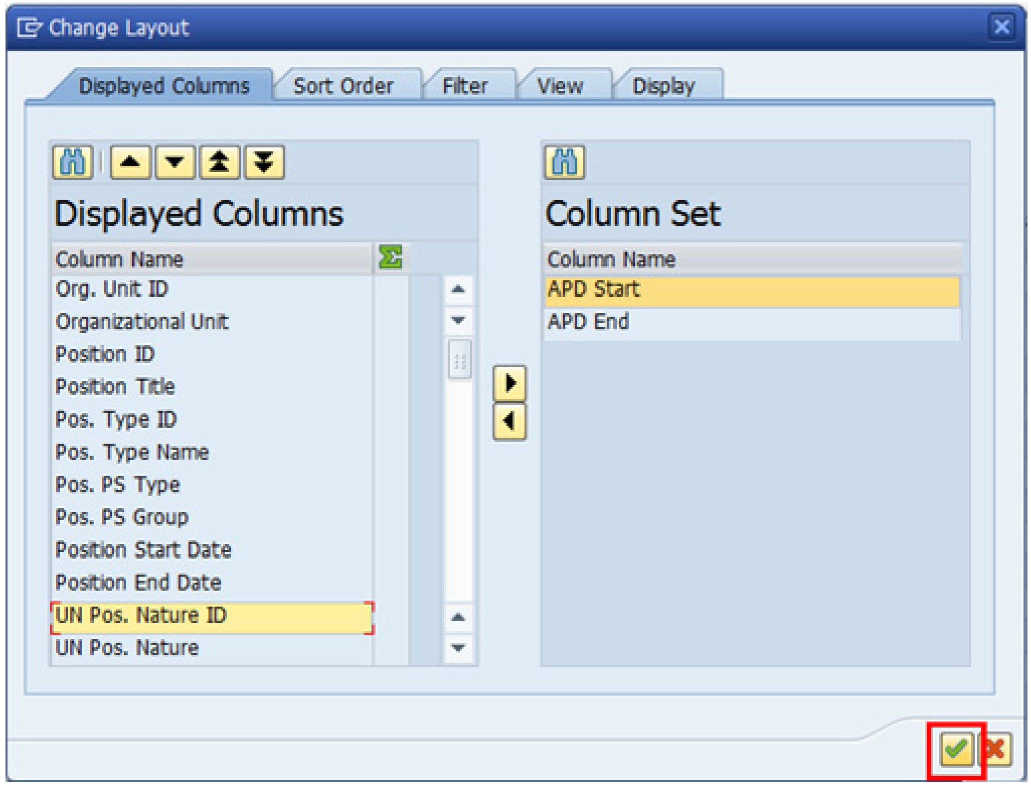
Click APD Start to select.

12. Click ▶ to move APD Start from the Displayed to the Excluded column.

Repeat to exclude APD End.

HR Partner All

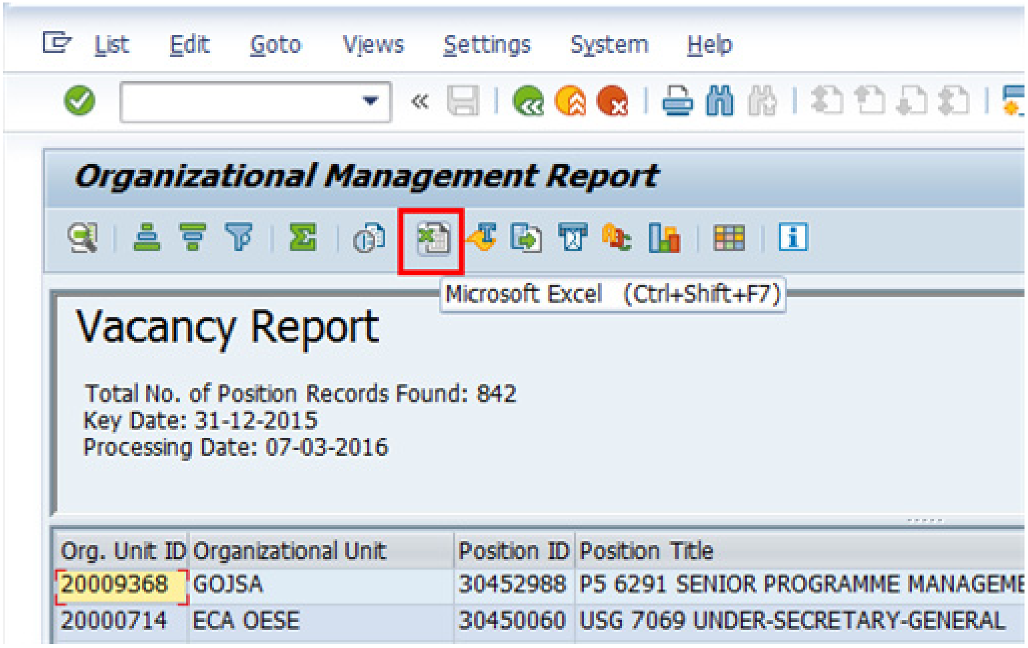
Change Layout



13. Click to confirm selections.

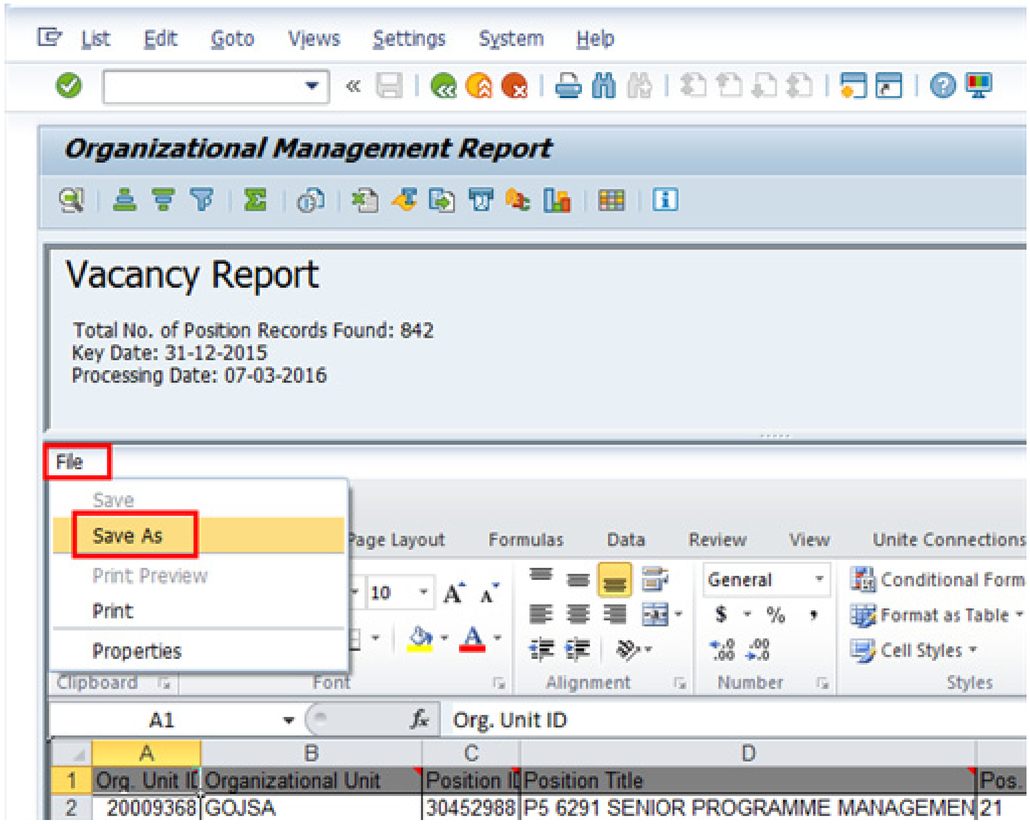
HR Partner All

Organizational Management Report



14. Click [Excel icon] to open the report in Excel.

Organizational Management Report

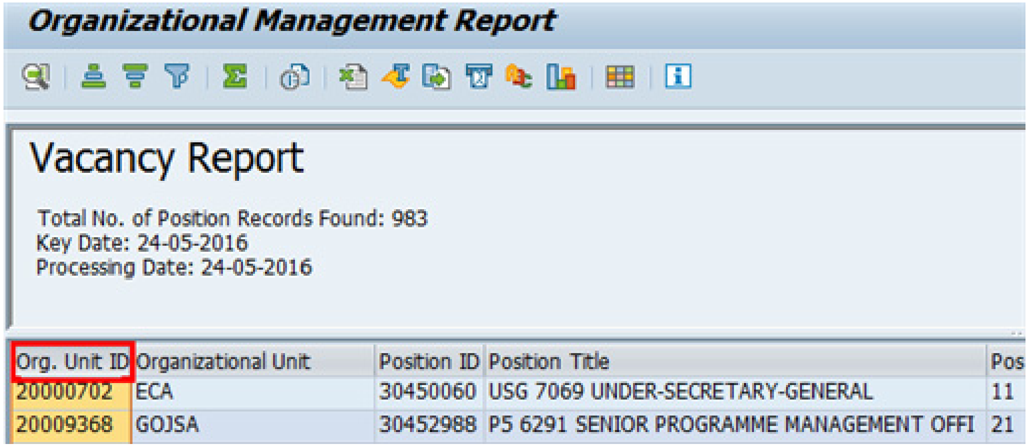


15.

Click File➔ Save As to save the report to your computer.

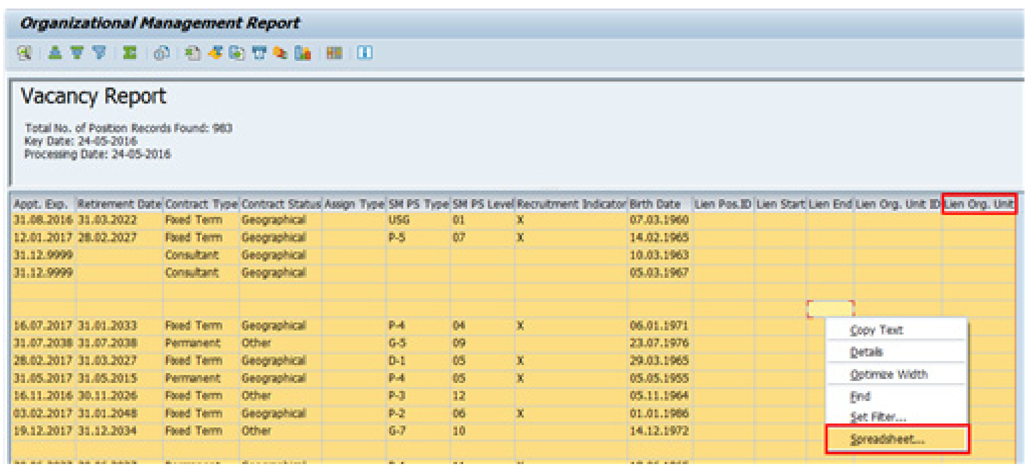
If the report has too many columns, this method of exporting to Excel may wrap lines making it difficult to work with. If this is the case, follow the alternative instruction for exporting below.

Organizational Management Report



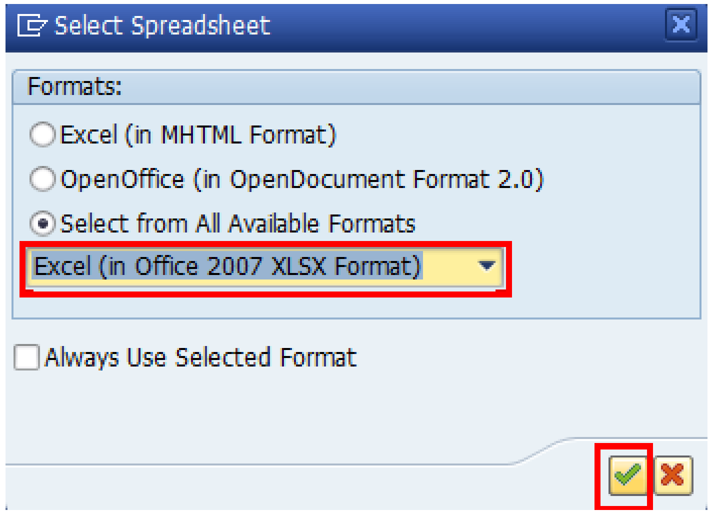
16. Click the first column header, then scrolling to the right.

Organizational Management Report



17. Right-click anywhere on the highlighted spreadsheet, then click Spreadsheet... .

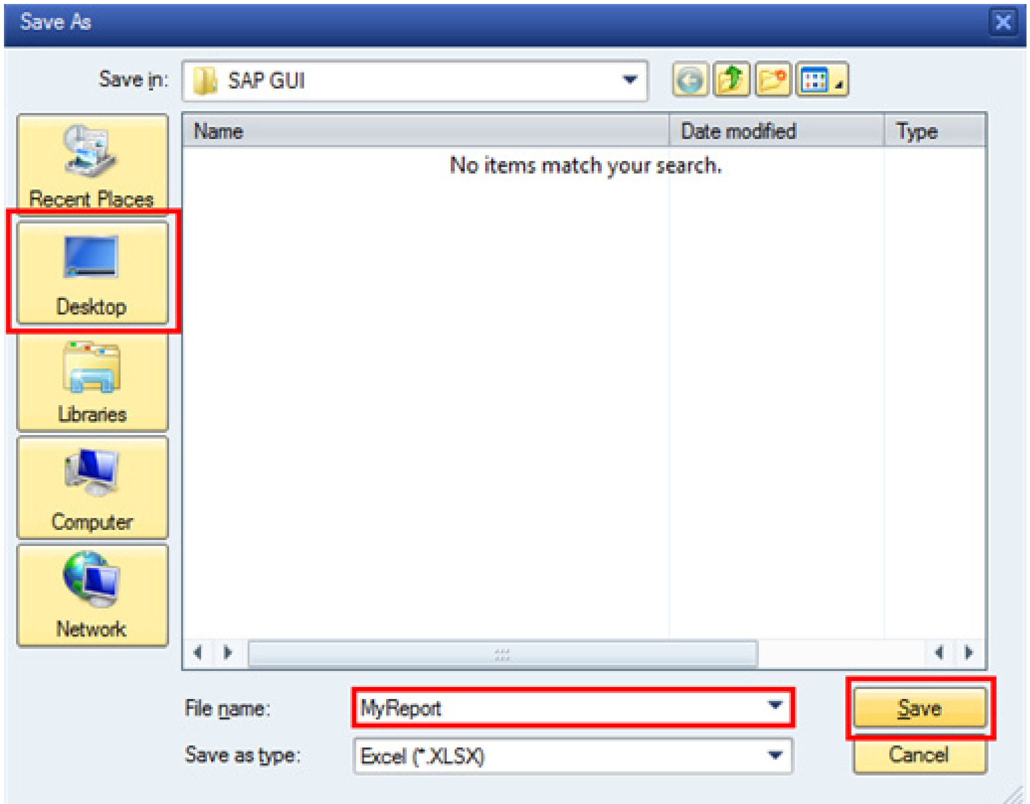
Select Spreadsheet



18. Select Excel (in Office 2007 XLSX Format) from the dropdown menu.

Click  to confirm selection.

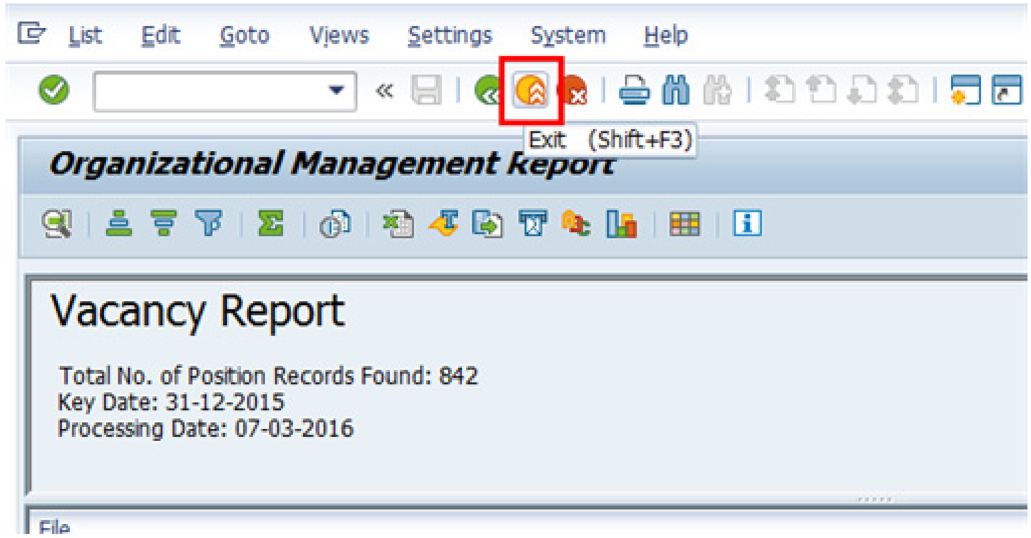
Save As



19. Select a location to save the file [Scenario: Desktop] and enter a name for the file [Scenario: MyReport] then click Save.

Respond to any warning messages that might display. A message at the bottom of the screen will confirm that the file has been saved.

Organizational Management Report



20. Click to exit.

6.2.2 Staffing Report

This report produces a staffing table listing the Org unit with Position and Staff Details.

The report does not include vacant positions.

Scenario

A report is needed to identify the current staffing for ECA as of 11.02.2016.

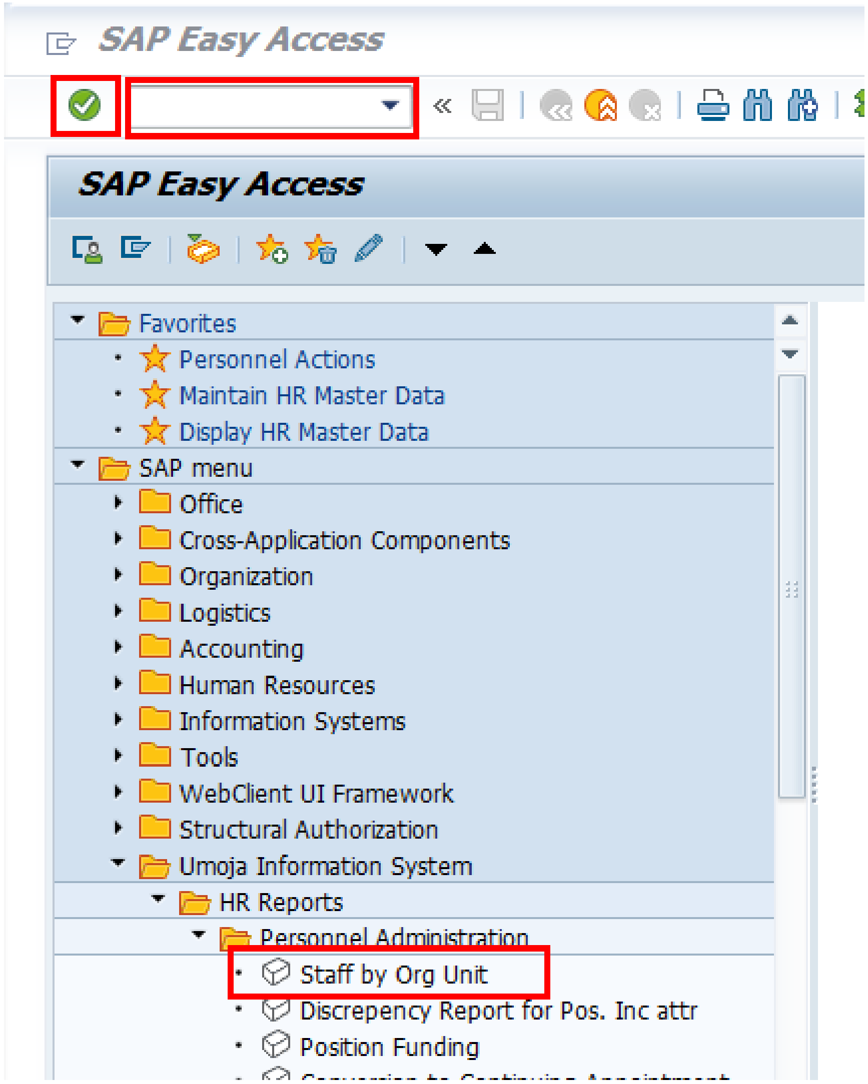
Procedure

1. Use the menu path to navigate to Umoja Information > HR Reports > Personnel Administration.

Alternatively, Type **ZPA_Staffing** in the Command text box and click .

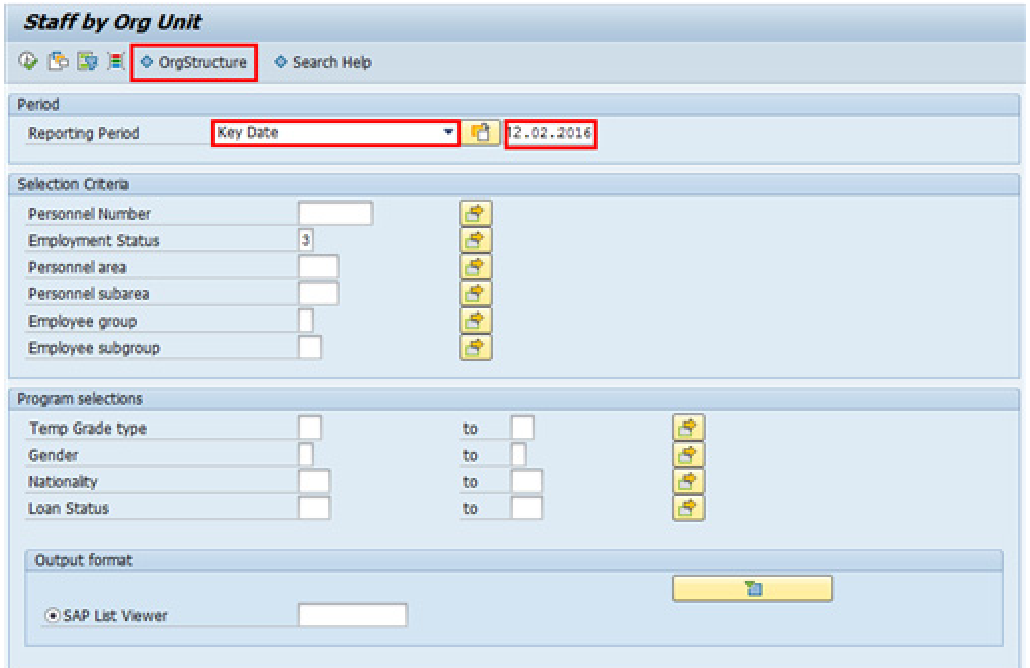
HR Partner All

SAP Easy Access - \\Remote



2. Double-click Staff by Org Unit .

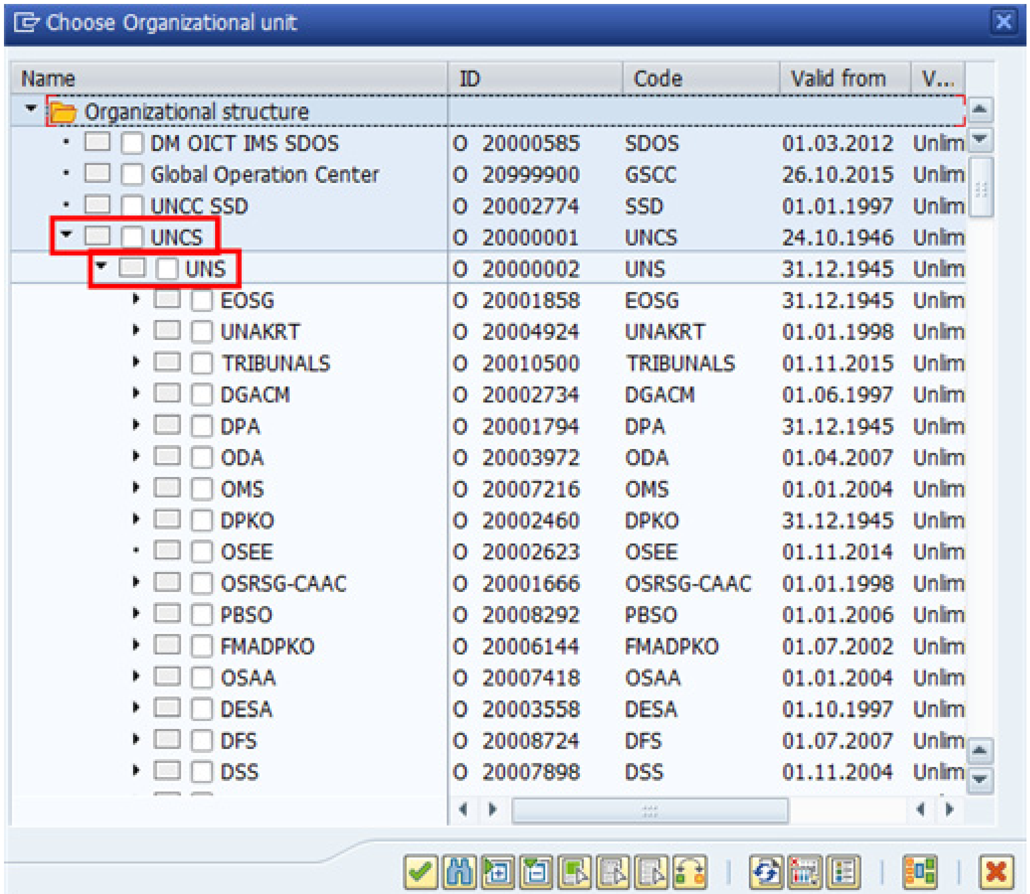
Staff by Org Unit - \\Remote



3. Select **Key Date** from the Reporting Period dropdown, and enter or select the appropriate date for the report. The report will present position staffing information as of the date entered. [Scenario: 12.02.2016]

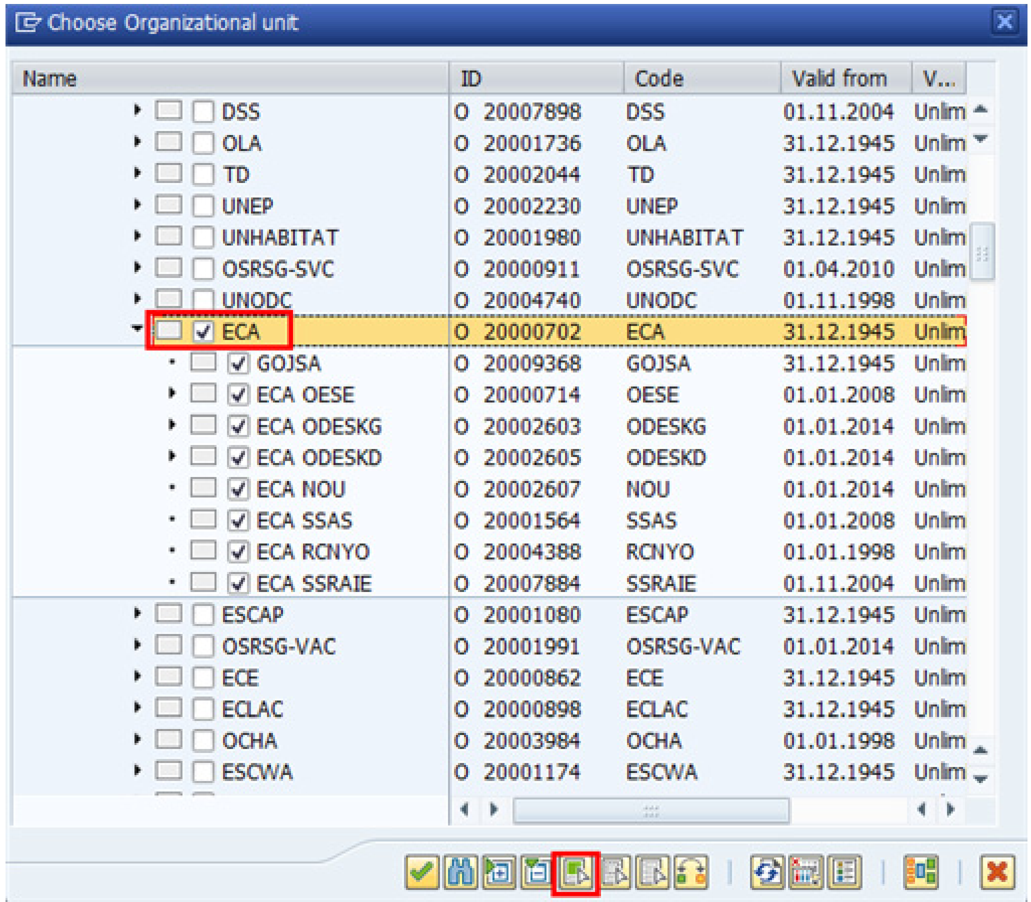
Click ◇ OrgStructure to specify the Organizational Unit(s) for which you want to run the report.

Choose Organizational unit - \\Remote



4. Navigate the Organizational Structure tree to locate the Org Unit you are looking for. You may need to scroll.

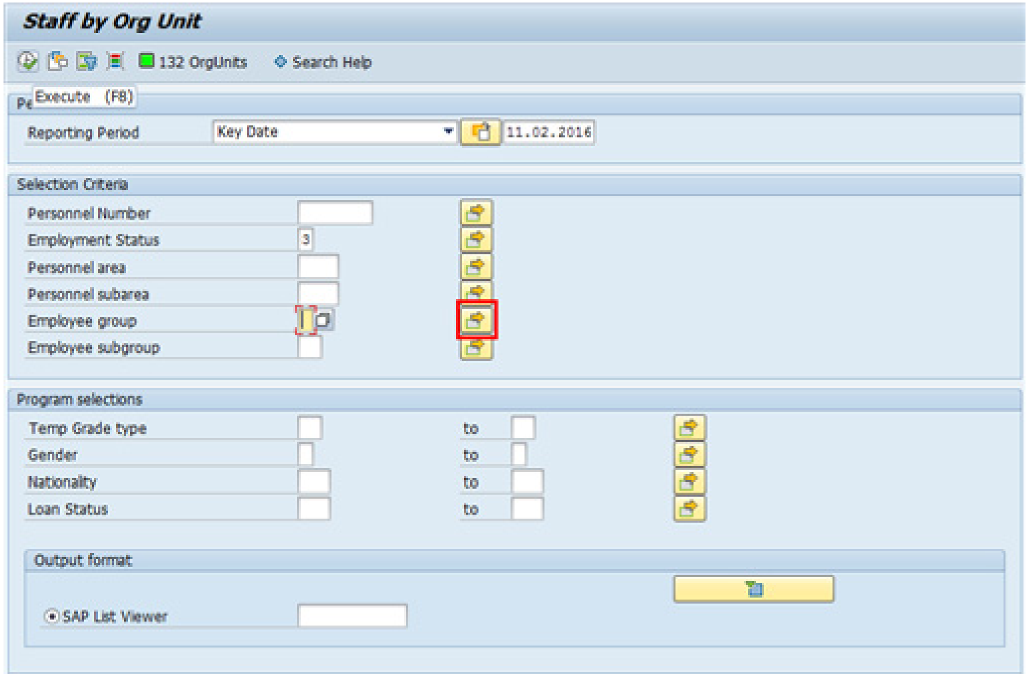
Choose Organizational unit - \\Remote



5. As you open each level, you can select individual units, or use the toolbar buttons so select an entire subtree.

In this example, ECA has been chosen, and the Expand Subtree button clicked to select all units under ECA.  .

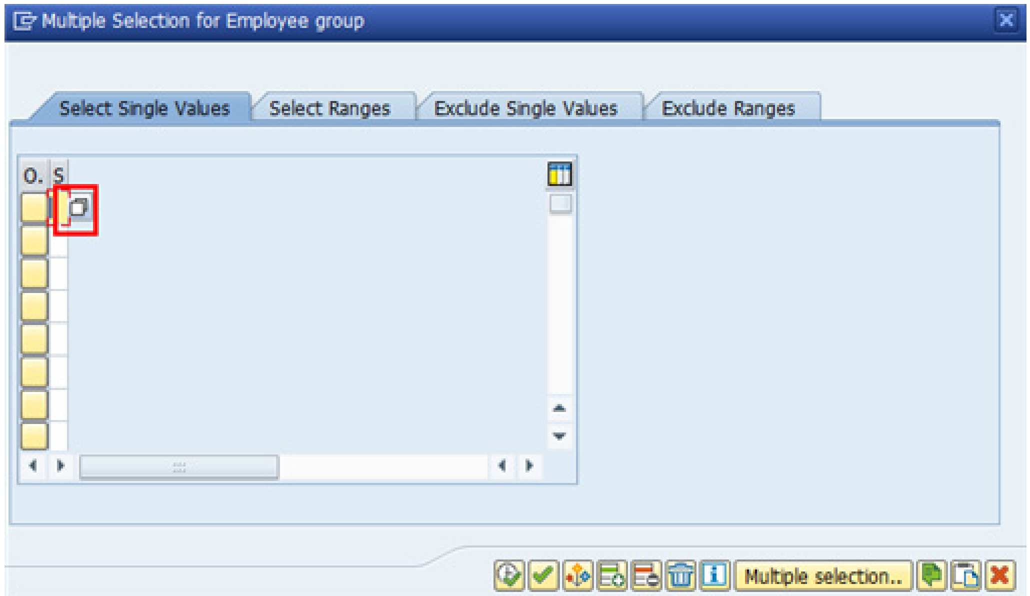
Staff by Org Unit - \\Remote

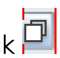


6. You can now run the report which will include all Employee groups. This example report will include all Employee groups.

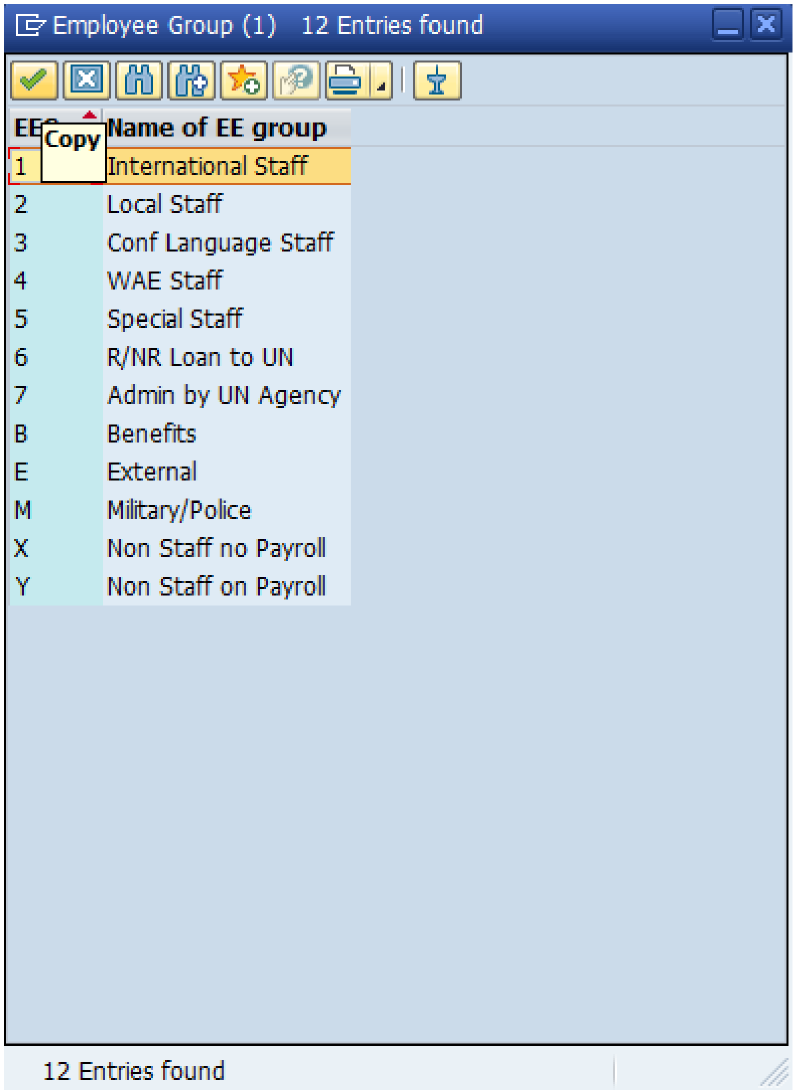
If you want to further refine the resulting report list by specifying the Employee group(s) you want to include, click  to select multiple options for Employee group.

Multiple Selection for Employee group - \\Remote



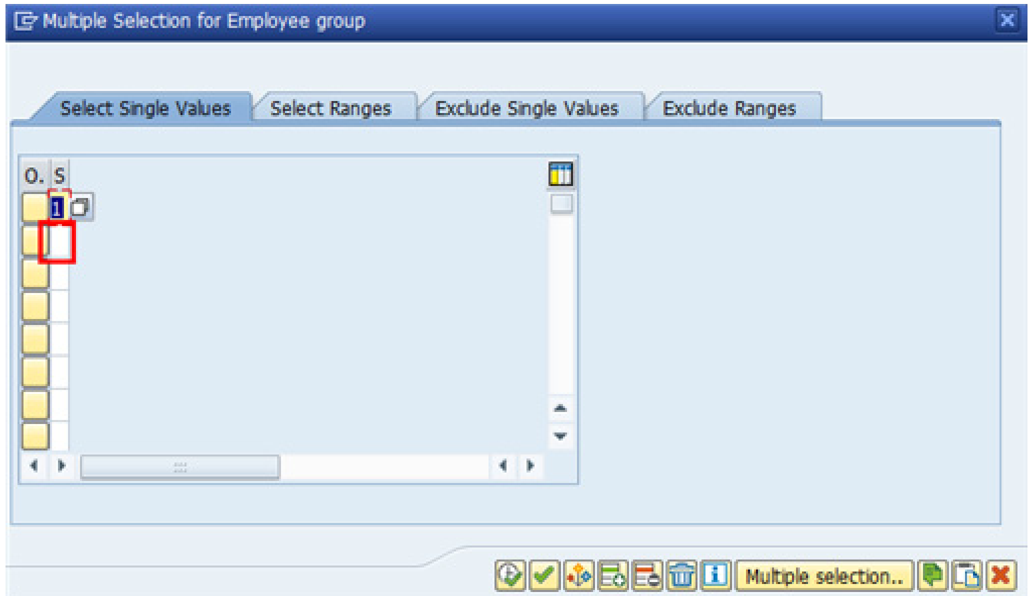
7. Click  to display the list of options for Employee group.

Employee Group (1) 12 Entries found - \\Remote



8. Select the an Employee group to include in the report, then click to confirm selection.

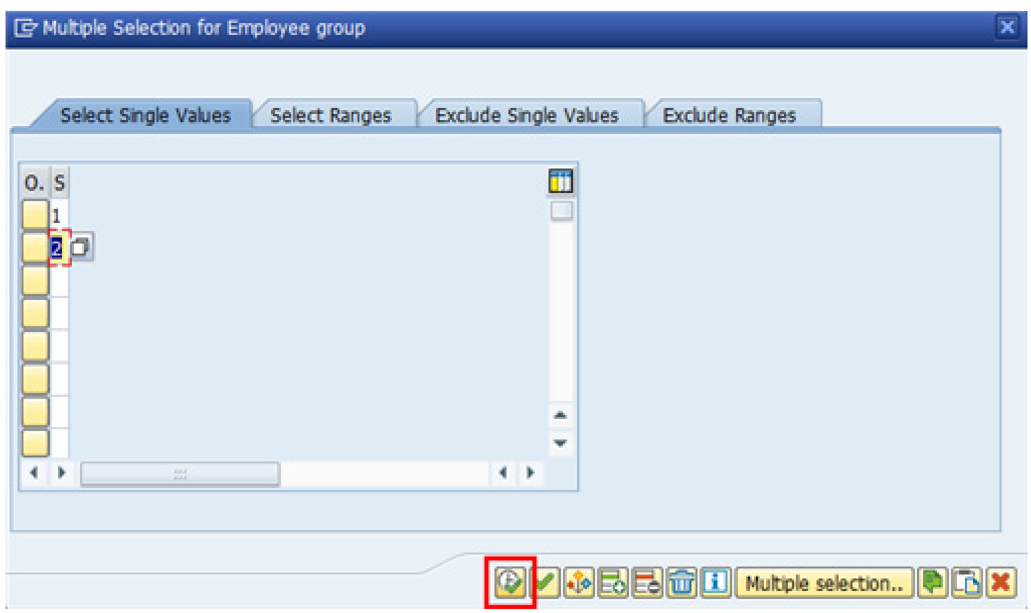
Multiple Selection for Employee group - \\Remote



9.

Click on the next line and follow the step above to select a second option to include in the report. Repeat to select additional Employee groups.

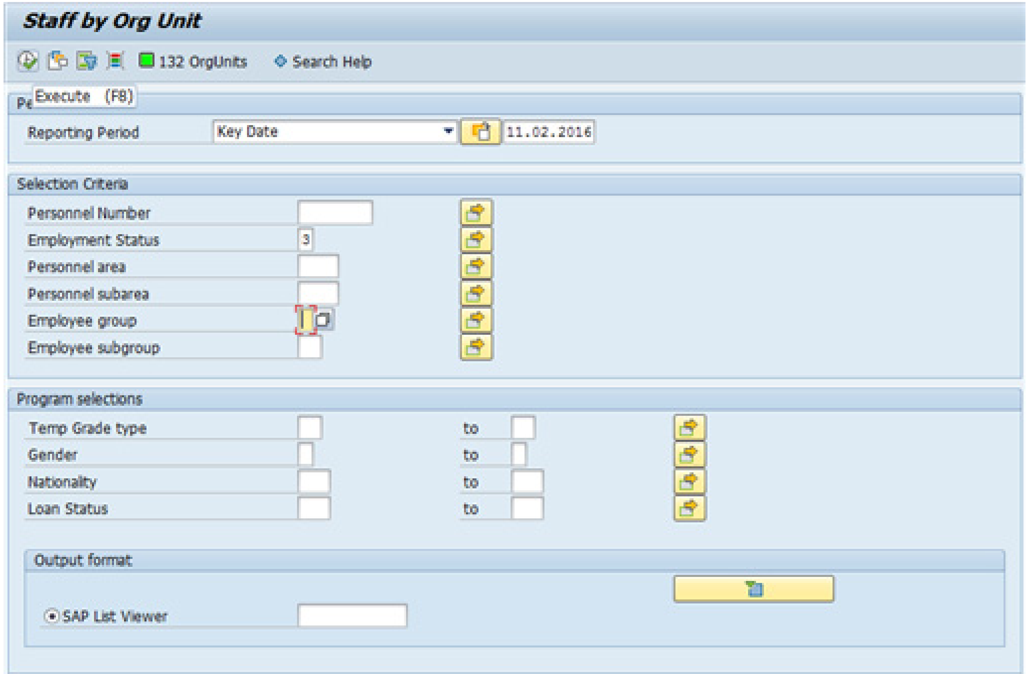
Multiple Selection for Employee group - \\Remote



10.

Click to end selection and return to the report parameters.

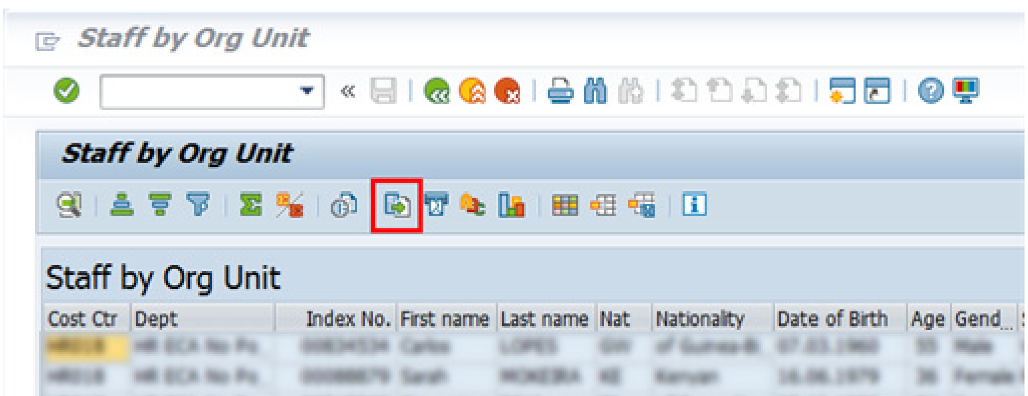
Staff by Org Unit - \\Remote



11. In this example, the report will include all Employee groups, so the Employee group field is left blank.

Click to execute the report.

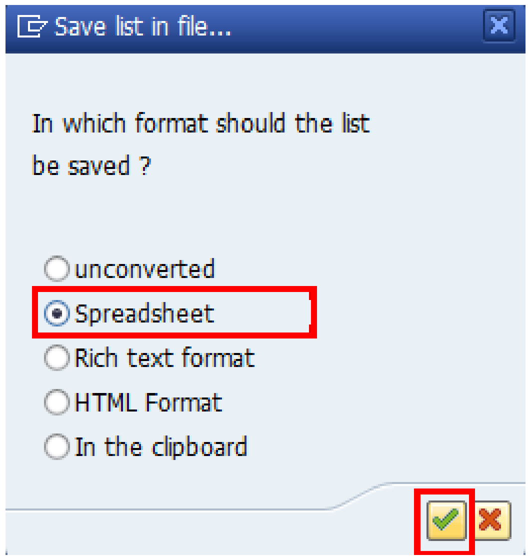
Staff by Org Unit - \\Remote



12. You can work with the report listing online, or you can export to Excel for offline work.

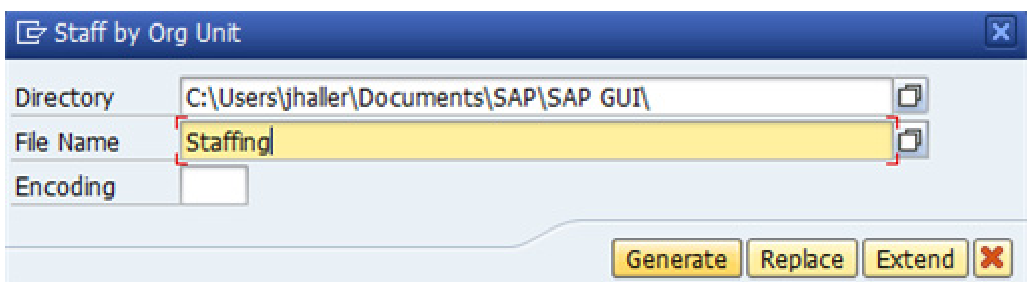
Click to export to Excel.

Save list in file... - \\Remote



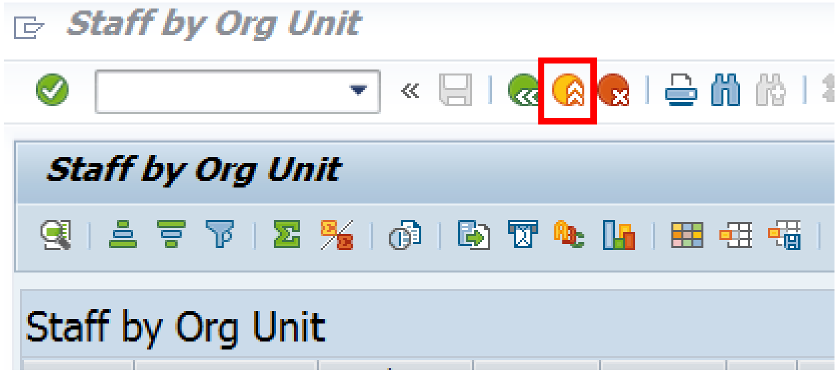
13. Select Spreadsheet to export to Excel, and click to confirm selection.

Staff by Org Unit - \\Remote



14. Select a location to save the file, enter a name for the file, then click Generate.

Staff by Org Unit - \\Remote



15. Click to exit.

6.2.3 Display Position Information

Use this procedure to view detailed position information including

- **Relationships:** indicates who currently holds the position, who has a lien on the position, if applicable, and who currently owns the position;
- **Cost Distribution:** shows the funding source; and
- **UN Position Attributes:** shows the expiration of the position.

This is a very useful T-code that the HR Partner should use to verify that the position is funded and really vacant before executing transactions that involve movements or appointments (initial appointments and reappointments) to the position.

Scenario

An HR Partner is reviewing position number 30006195 prior to executing a Temp. Assignment Change / Extend PA to ensure there will be no position encumbrance conflict.

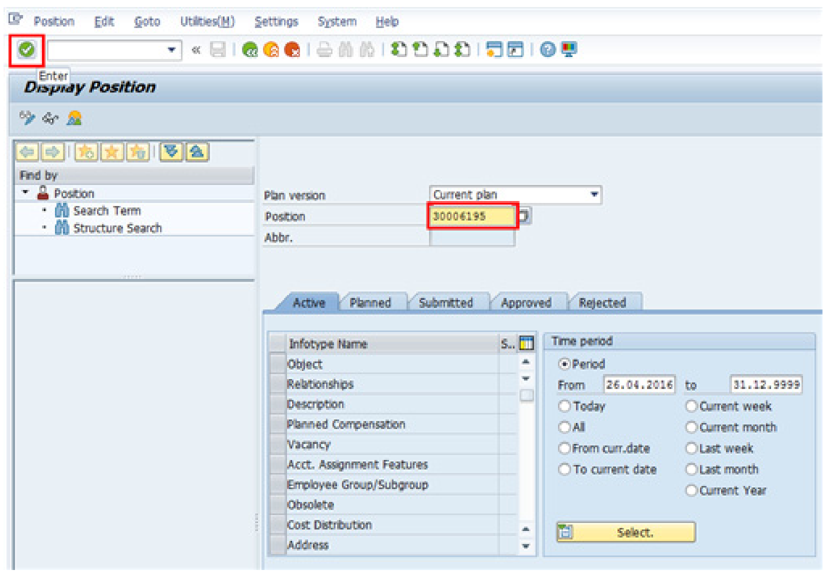
Procedure

1. Start the transaction using the menu path or transaction code.

SAP Easy Access

2. Click after typing PO13D in the Command text box.

Display Position



3. The most commonly required position information includes:

- **Relationships:** indicates who currently holds the position, who has a lien on the position, if applicable, and who currently owns the position;
- **Cost Distribution:** shows the funding source; and
- **UN Position Attributes:** shows the expiration of the position.

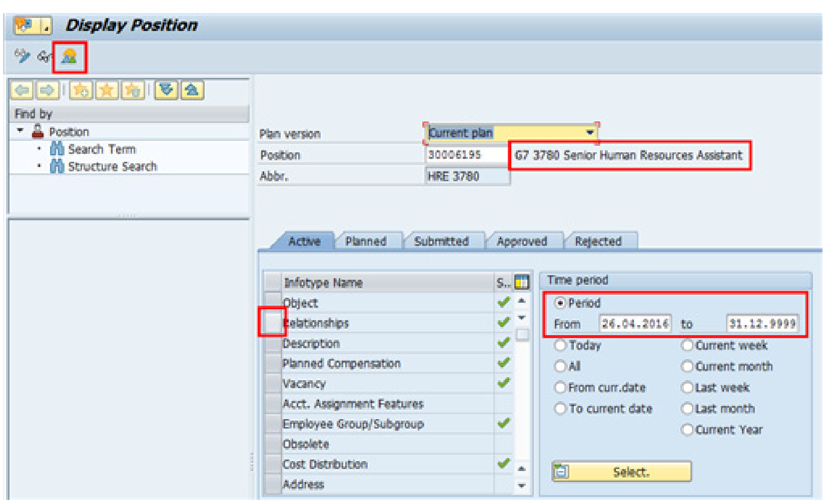
Other information includes:

- **Object**: Shows the validity period of the position information, includes the position abbreviation information and the full name of the position title
- **Description**: Shows a description of the position
- **Employee Group / Subgroup**: Displays the EE Group and EE Subgroup associated with the position
- **Planned Compensation**: Displays the Pay Scale type, Pay Scale Area, and Pay Scale Group for the position
- **Acct. Assignment Features**: Displays the Personnel area and Personnel subarea of the position
- **Vacancy**: Displays the vacancy status of the position

Enter the position number in the Position text box. [Scenario: 30006195]

Click to validate entry.

Display Position



HR Partner All

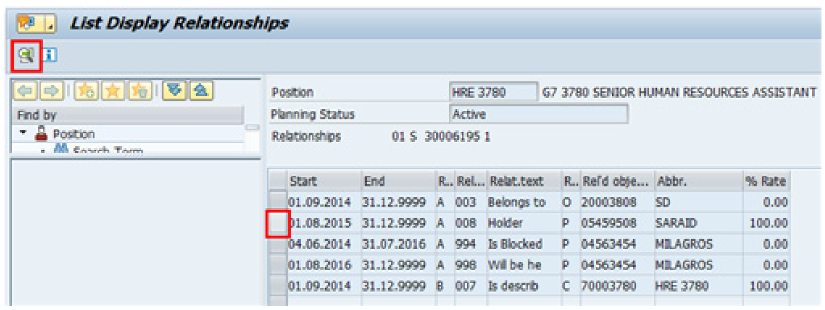
4. Verify the position Grade and Job Title.

By default the system selects today's date thru 31.12.9999 as the period to access current position information. If you need to view the position information for prior periods of time, adjust the "From" and "to" fields, as appropriate.

Click to select the Relationships infotype.

5. Click to access the position's Relationship records.

List Display Relationships



6. Relationships records store information regarding what Org Unit owns the position, who is currently encumbering the position, and who has a lien on the position.

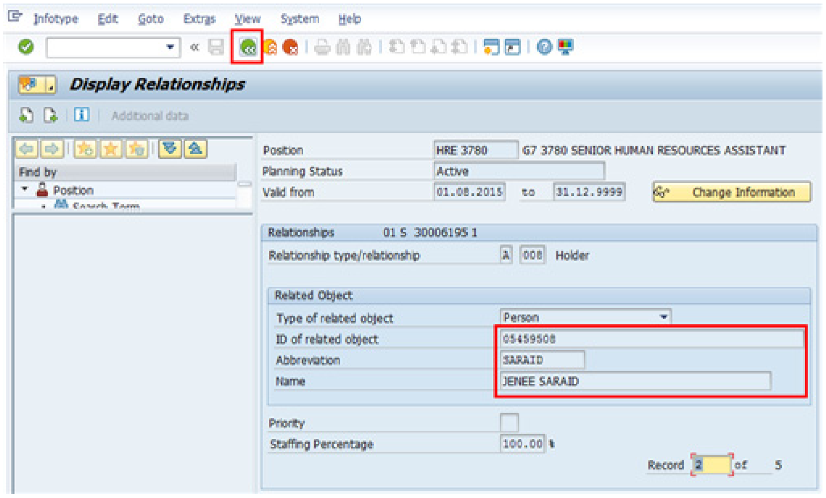
The **Relation Text** column values are:

- **Belongs To:** Shows what Org Unit owns the position
- **Holder:** Shows the person currently encumbering the position based on the period of time you entered
- **Is Blocked:** Shows who currently has a lien on the position
- **Will be held by:** Shows who will encumber the position for a future date (normally the person who has a lien on the position)

Click to select the current **Holder** record.

7. Click to view the record details.

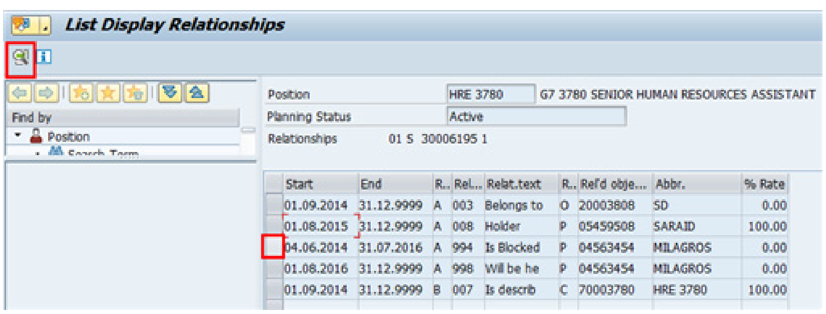
Display Relationships



8. The **Holder** record displays the staff member's Personnel Number (ID of related object) and the staff member's name.

Click to return to the list of Relationships records.

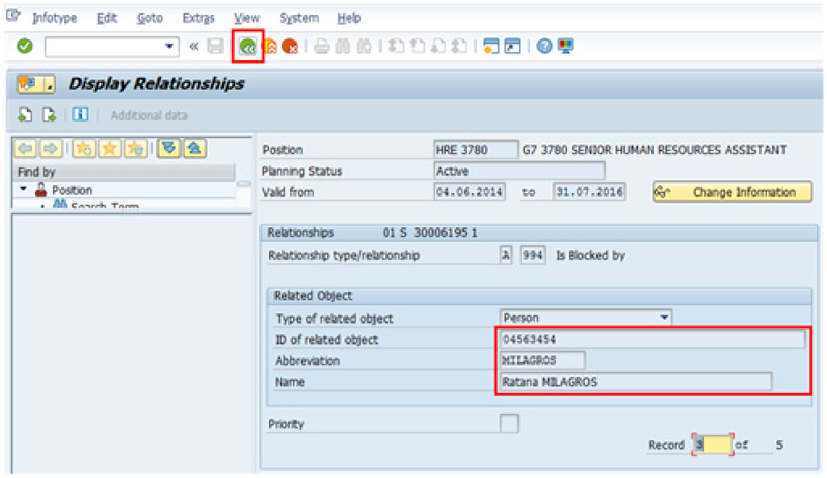
List Display Relationships



9. Click to select the **Is Blocked by** record.

10. Click to view the record details.

Display Relationships

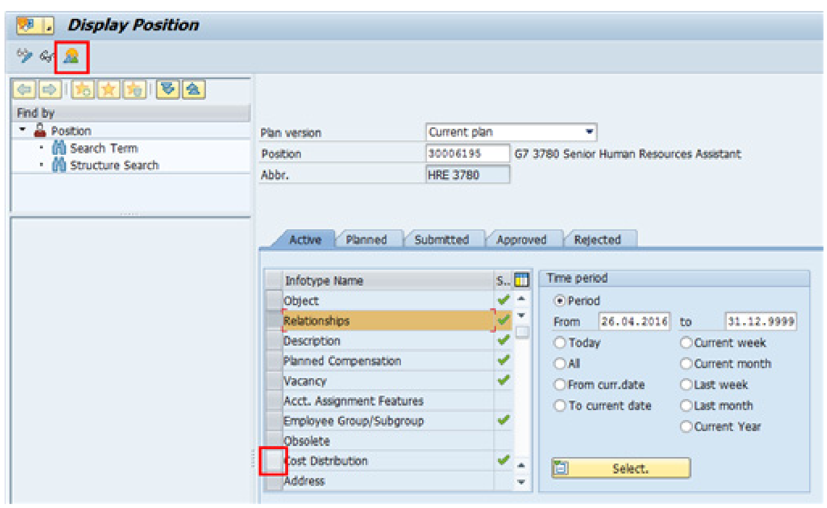


11. The **Is Blocked by** record displays the staff member's (lien position) Personnel Number (ID of related object) and their name.

Click to return to the list of Relationships records.

12. Click again to return to the Display Position screen.

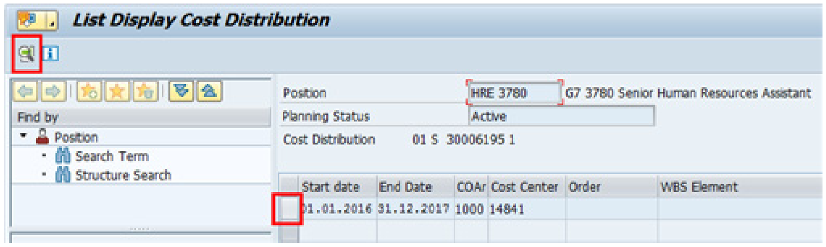
Display Position



13. Click to select Cost Distribution.

14. Click to see the list of Cost Distribution records.

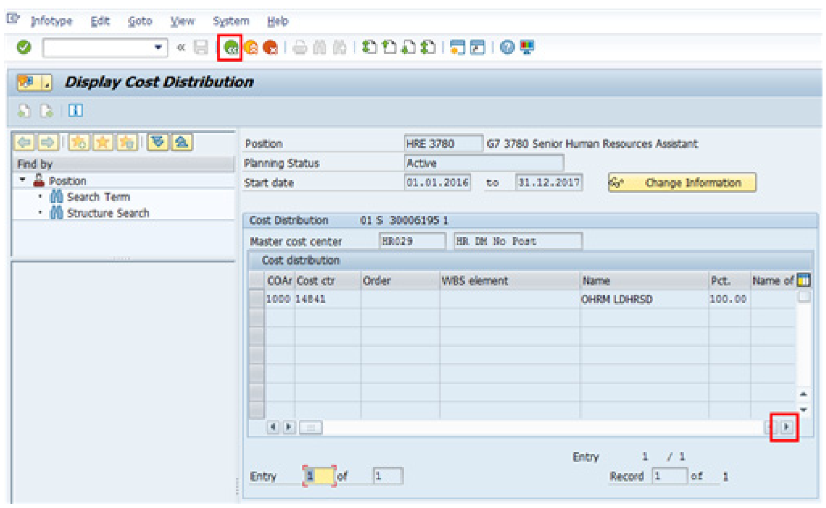
List Display Cost Distribution



15. Click ☐ to select the record.

16. Click the display icon to display the record details.

Display Cost Distribution



17. The Cost Distribution record displays all funding information.

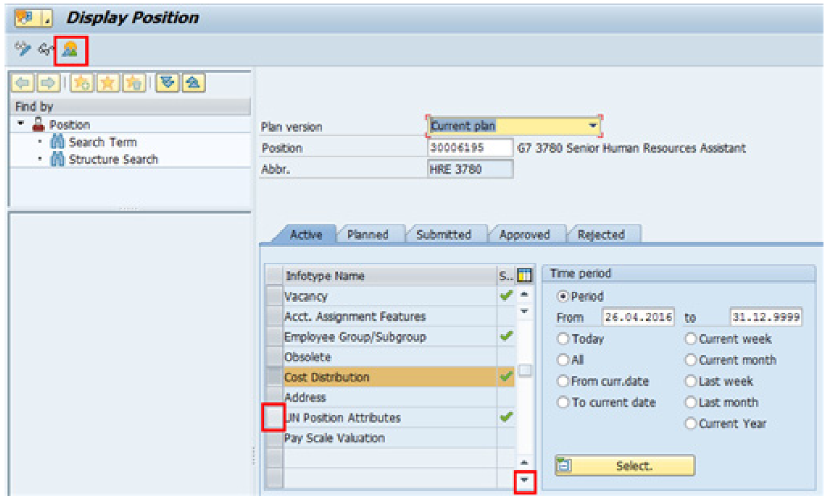
Remember, if the funding of the position expires, the person who is occupying the position will not get paid. In the event that there is no funding for a position you need to use, you should **NOT** proceed with the HR transaction. Contact your OM Administrator.

Click the scroll-right arrow to scroll and view the full record.

18. Click the back icon to return to the list of Cost Distribution records.

19. Click the back icon again to return to the Display Position screen.

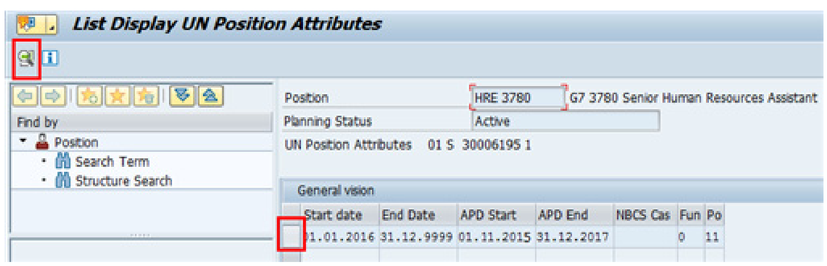
Display Position



20. Scroll down the list of Infotypes and click to select UN Position Attributes.

21. Click to display the list of UN Position Attribute records.

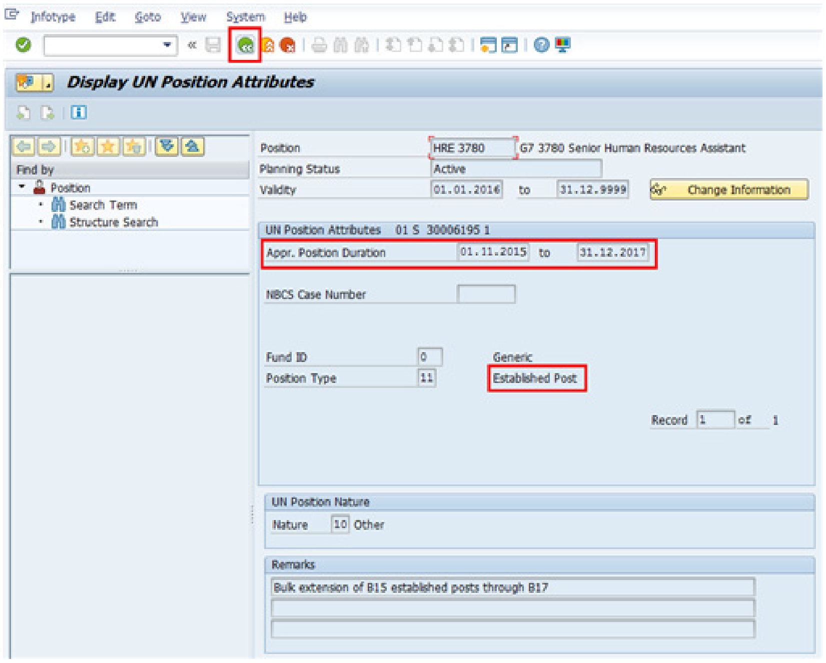
List Display UN Position Attributes



22. Click to select the record.

23. Click to view the record details.

Display UN Position Attributes



24. The UN Position Attributes record displays the approved position duration and the position type.

In this example we see an established position that was initially approved on 01.11.2015 (Umoja conversion date) and is funded through 31.12.2017 (end of current biennium).

Click  to return to the list of UN Position Attribute records.

25. Click  to return to the SAP Easy Access screen.