Table of Contents

Overview

This Job Aid covers the steps necessary to guide Users in the Organizational Management (OM) process of Maintaining an Org Unit.

Please refer to the overview in the OM Create Org Unit Job Aid.

Job Aid Objectives

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

- Maintain org units;
- Understand the significance of the required fields/info types in Maintaining org units;
- Expire org units;
- Understand the significance of the required fields/info types in Expiring org units;
- Log into the Umoja ECC and check that infotypes entered in the Portal are reflected in ECC.
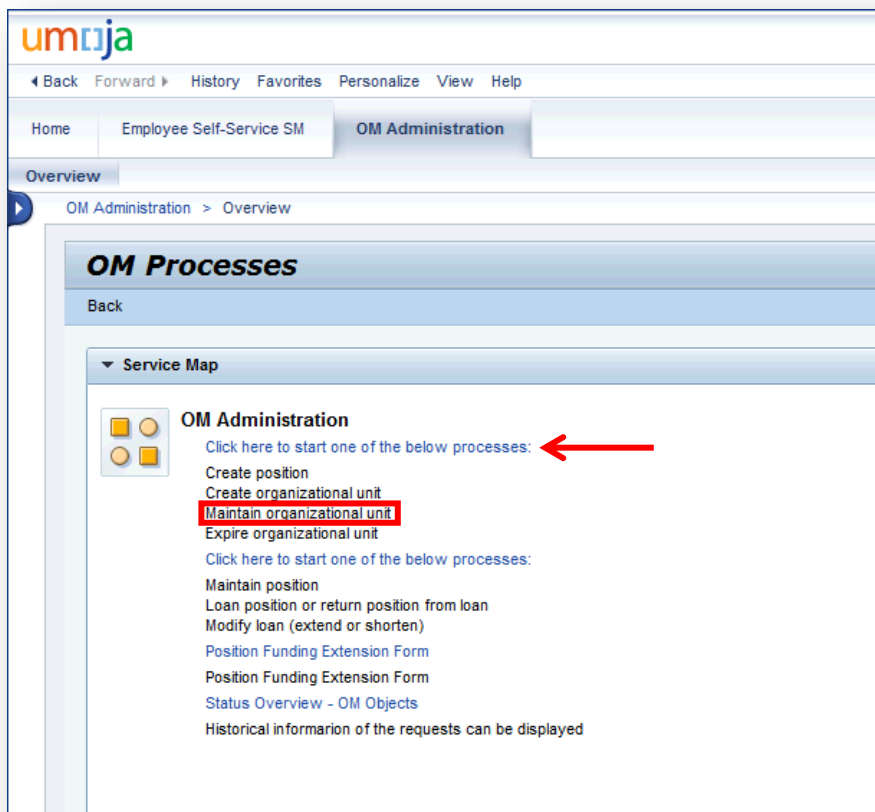
Procedure

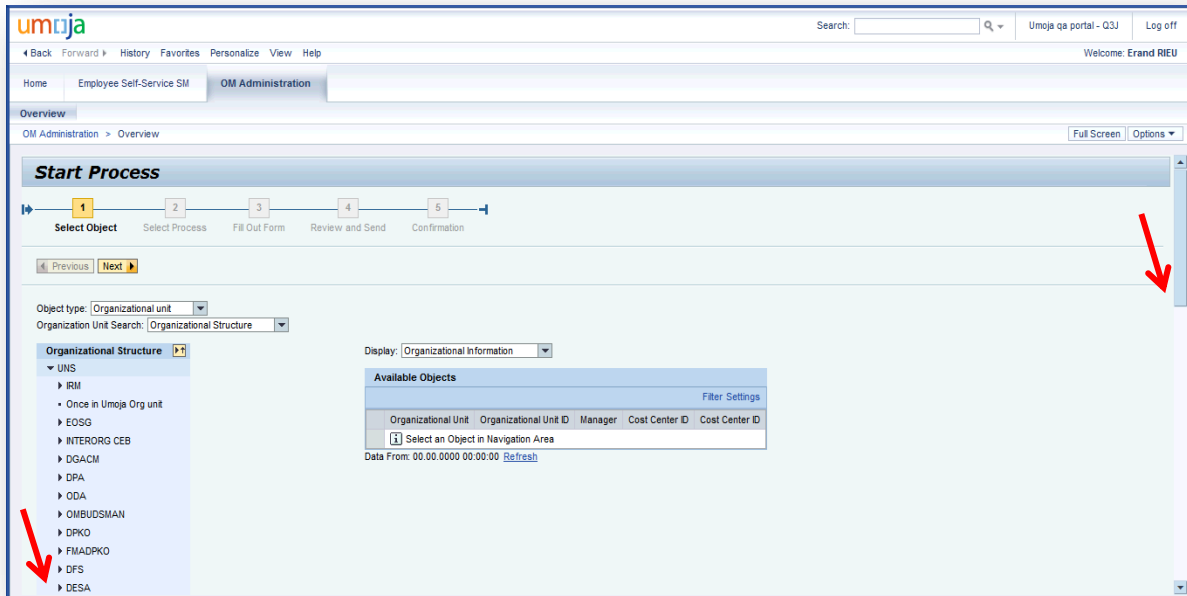1. Log in the Portal with the enterprise role OM Administrator which opens this screen:
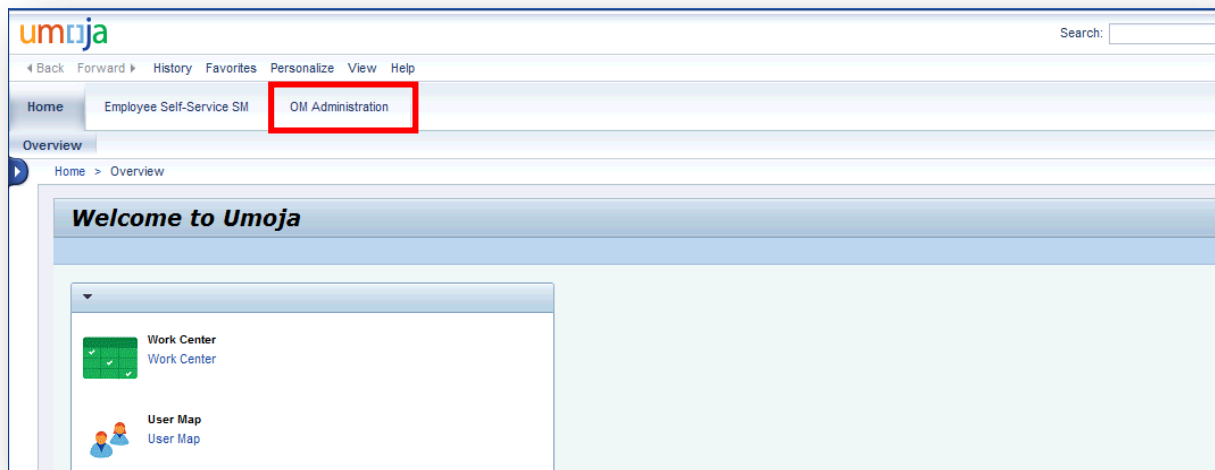
2. In the screen above, click on OM Administration which opens this screen.
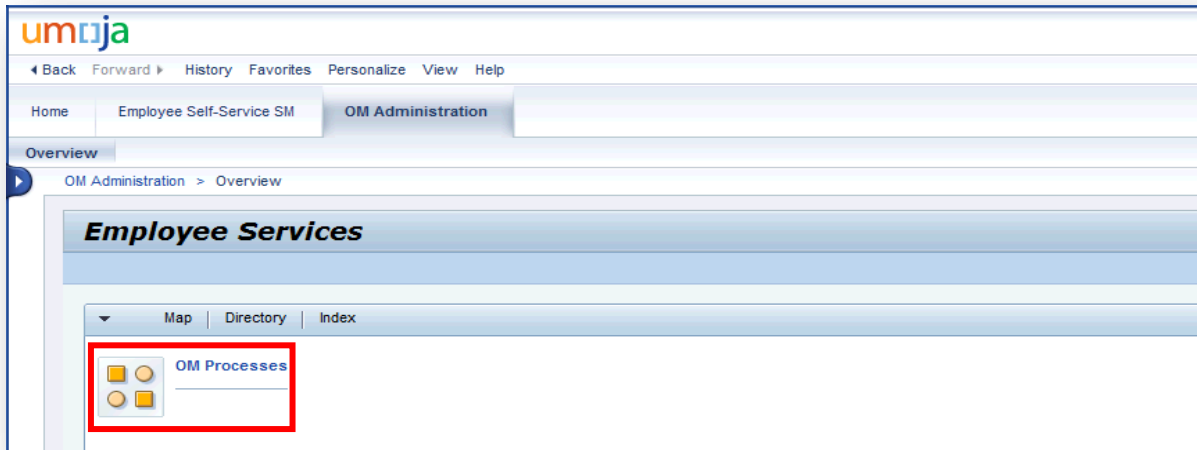
3. In the screen above, click on OM Processes which opens this screen.

4. In the screen above, click on the blue line of text above "Maintain organizational unit" which opens this screen:

5. In the screen above, scroll down to the Organizational Structure (Department or Office) where you need to maintain an organizational unit (Example: OCHA). Click on the name of the Department or Office and on the name of the specific organizational unit (Example: OCHA CRD FO KIEV) which opens this screen:

Maintain org unit – Move org unit
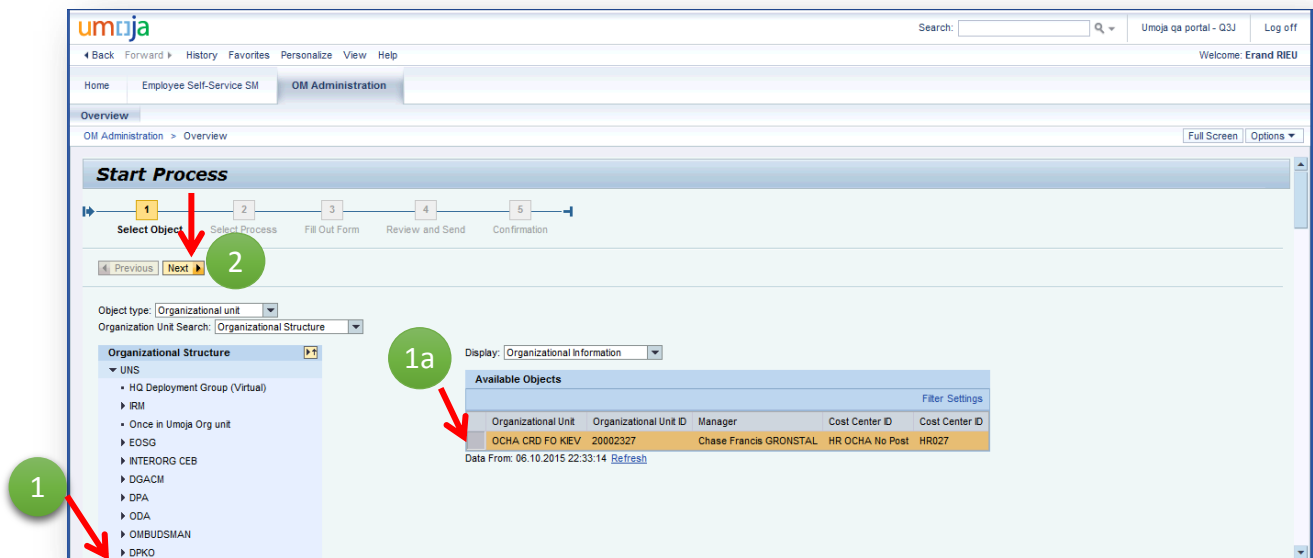
Note that in the example above, OCHA is below DPKO. The available objects in the Organizational Information displayed belong to OCHA.

6. In the screen above, click on the organizational unit that you need to maintain (Example highlighted: OCHA CRD FO KIEV) and click Next which brings this screen:

7. In the screen above, click on Maintain Organizational Unit and click Next which brings you this screen:

8. In the screen above, enter the 01.01.2015 Start Date of the Organizational Unit that you need to maintain. Note that the End Date is pre-filled and not editable.

9. Click on the Structural Search which opens this screen:
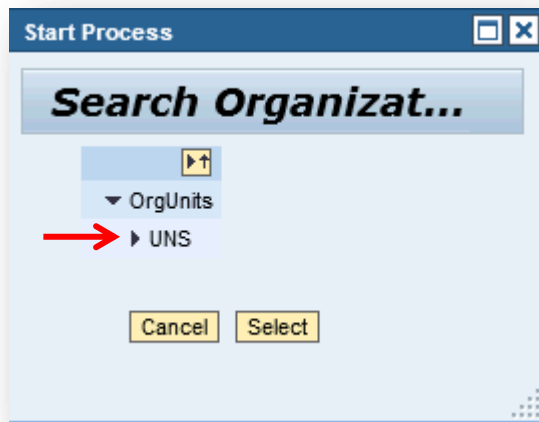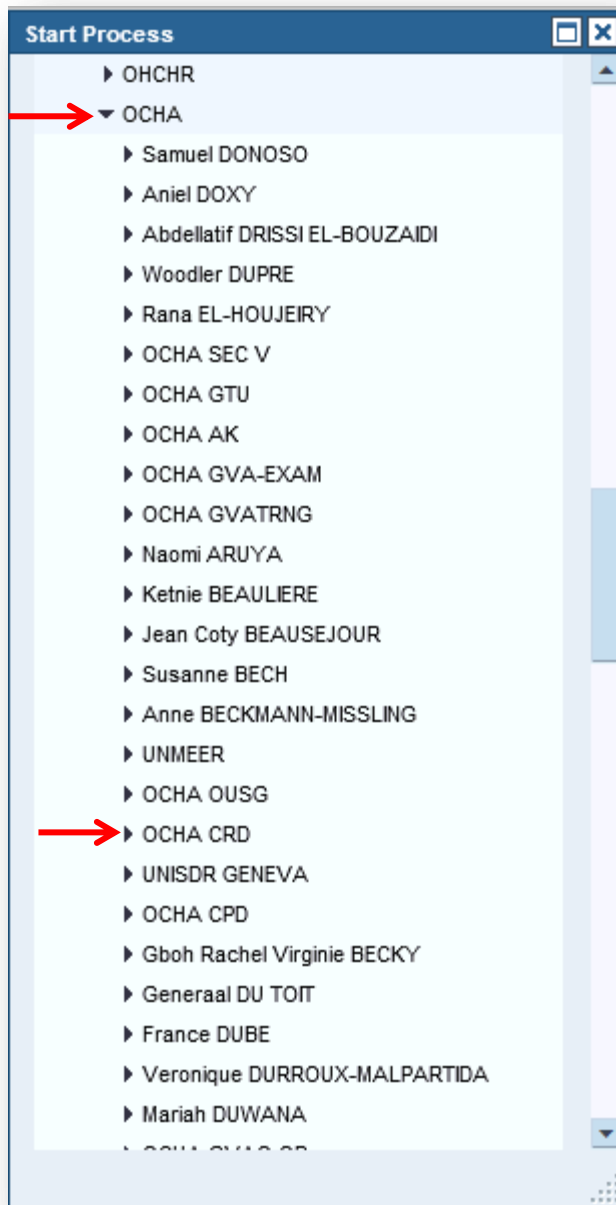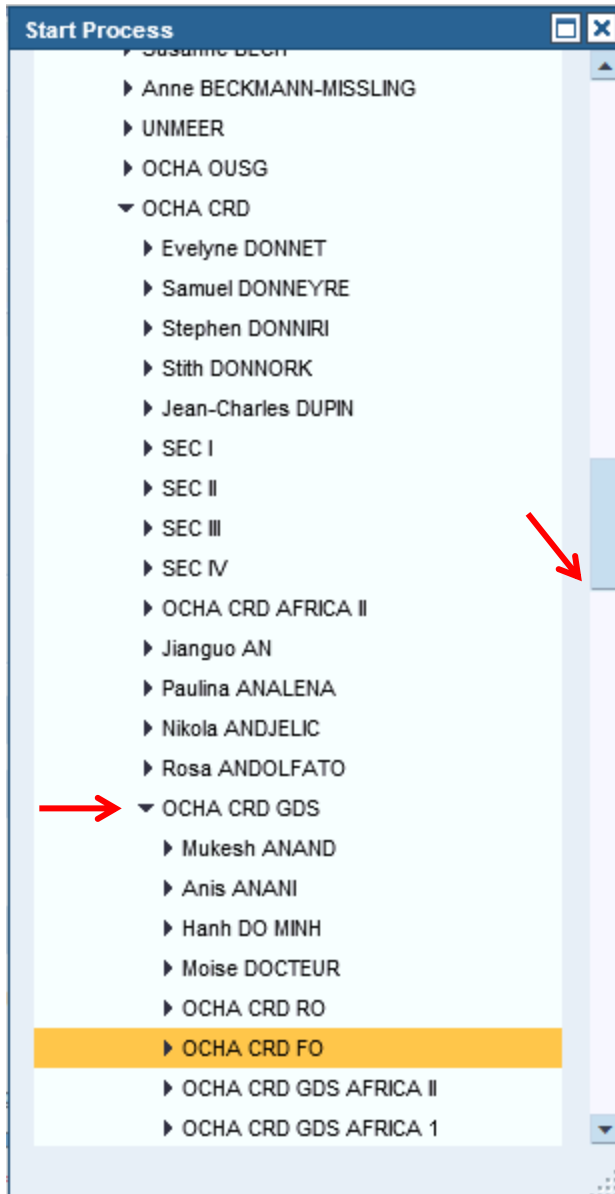

10. In the screen above, click on ▶ on the left of UNS which expands the organizational structure and opens this screen:

11. In the screen above, scroll down until you find OCHA. Click on OCHA which opens its organizational structure as shown in this screen:

12. In the screen above, click on the ▶ on the left of OCHA CRD which opens this screen:

13. Click on/select OCHA CRD GDS which opens its organizational structure as shown above.
14. Select OCHA CRD FO, continue scrolling down until you see the Select button and click on it which opens this screen:
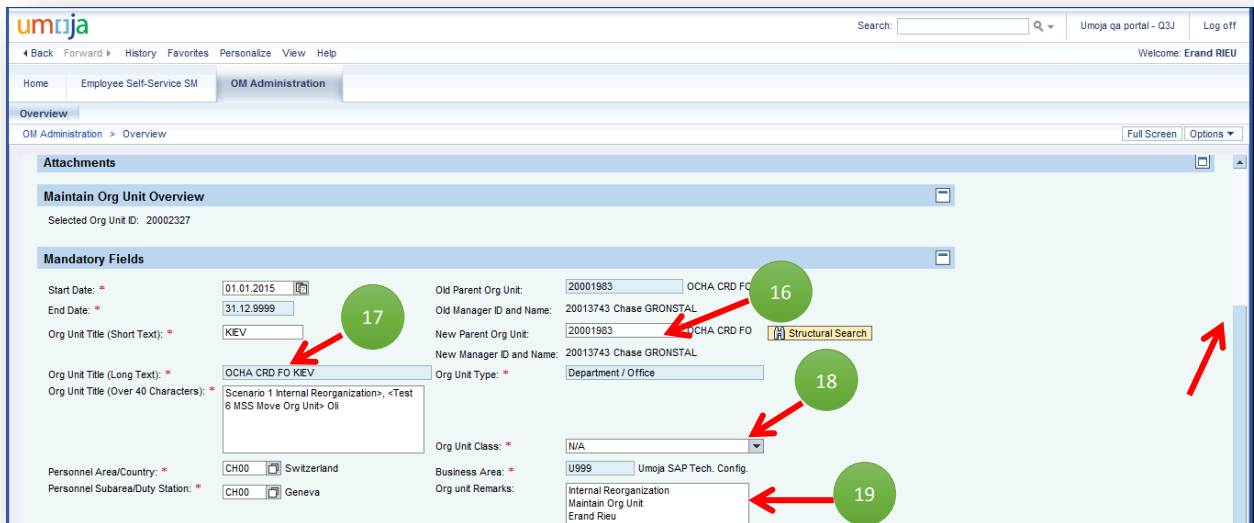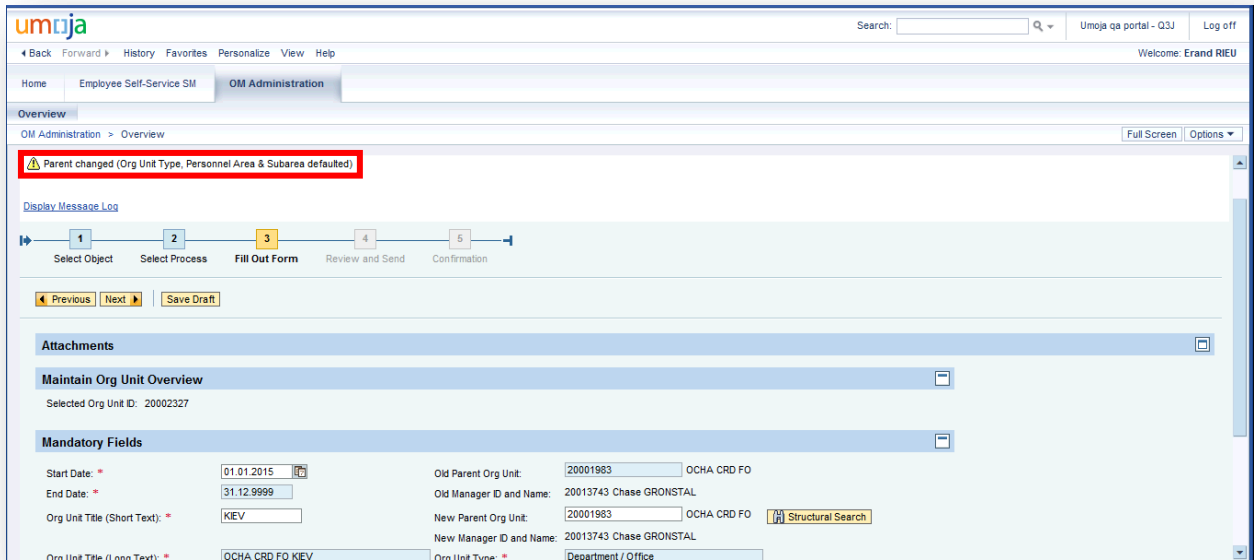
Please note that the two screens above are one. The entire screen cannot be captured in one shot.

15. In Part I of the screen above, note that the message "Parent changed" appeared.

16. Note further that in Part II of the screen above, the New Parent Org Unit and New Manager ID and Name are shown.

17. The Org Unit Title also changed.

18. Click on the down arrow in the Org Unit Class field and select "N/A".

19. In the screen above in Org Unit Remarks, type:

Internal Reorganization
Maintain Org Unit
Your name

20. Scroll up and click on Next which opens this screen:

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

21. Review the data and click on Send which opens this screen:

Note that the process reference number appeared and the process progressed to "5 Confirmation".

Maintain org unit – Expire org unit

22. Repeat Step 4 which opens this screen:

23. In the screen above, scroll down to the Organizational Structure (Department or Office) where you need to maintain an organizational unit (Example: OMBUDSMAN). Click on the name of the Department or Office.

24. When its organization structure opens, scroll down and click on the name of the specific organizational unit (Example: OMBUDSMAN ENTEBBE) which opens this screen:

Note that in the example above, OMBUDSMAN ENTEBBE is below OMBUDSMAN. The available objects in the Organizational Information displayed belong to OMB ENTEBBE.

25. In the screen above, select OMB ENTEBBE and click Next which opens this screen:
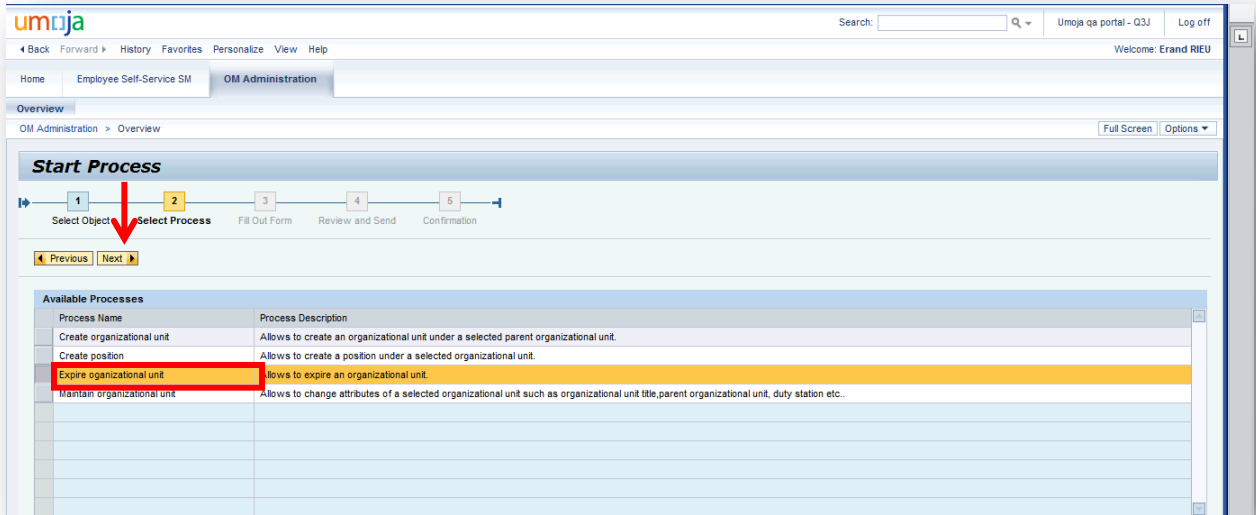
26. In the screen above, select Expire organizational unit and click Next which opens this screen:
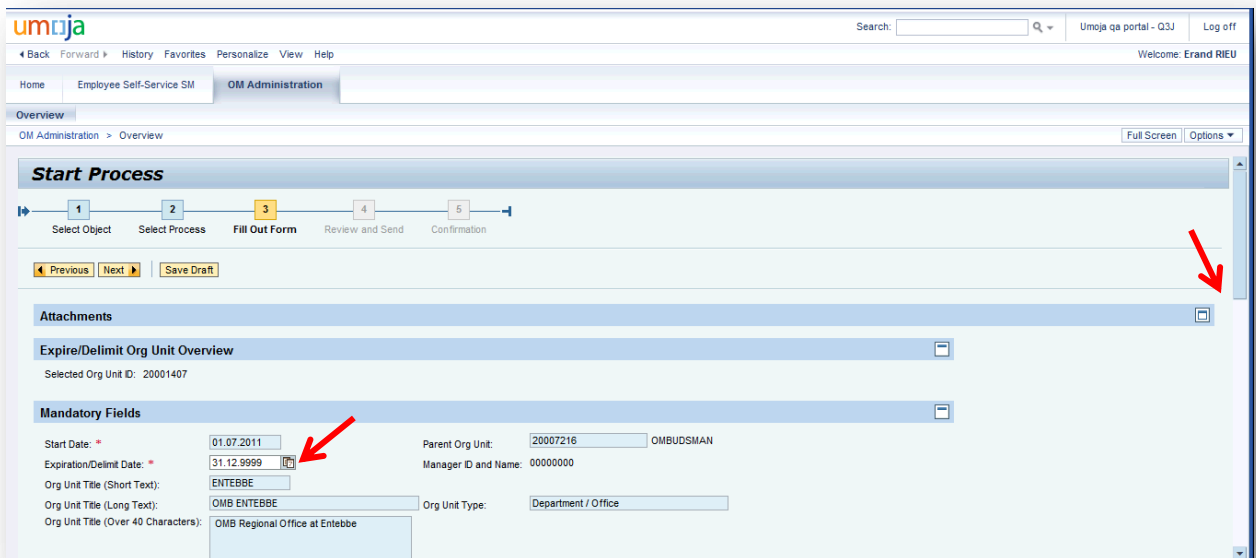
27. In the screen above, enter the date the org unit has to be expired and scroll down to the bottom which looks like this:

28. In the bottom of the screen above, enter the Reason for Expiration as shown in this screen:

Note that if a child org unit exists or child positions exist, an error message appears. Only org units without child org unit(s) and without positions can be expired.

Note further that a position cannot be expired if it is encumbered. The incumbent has to be placed against another position (by an HR Partner in the Personnel Administration module) within the department first.

In placing an incumbent against another position, an HR Partner has to be guided by the relevant provisions of ST/AI/2016/1 dated 28 December 2015 on the Staff selection and managed mobility system.
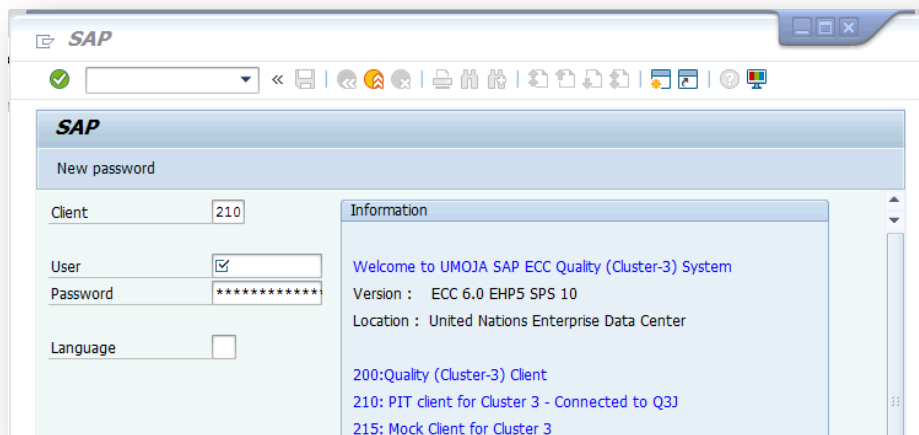
29. In the screen above, scroll back up and click Next which opens a screen similar to Steps 20 and 21 if the org unit was expired successfully.
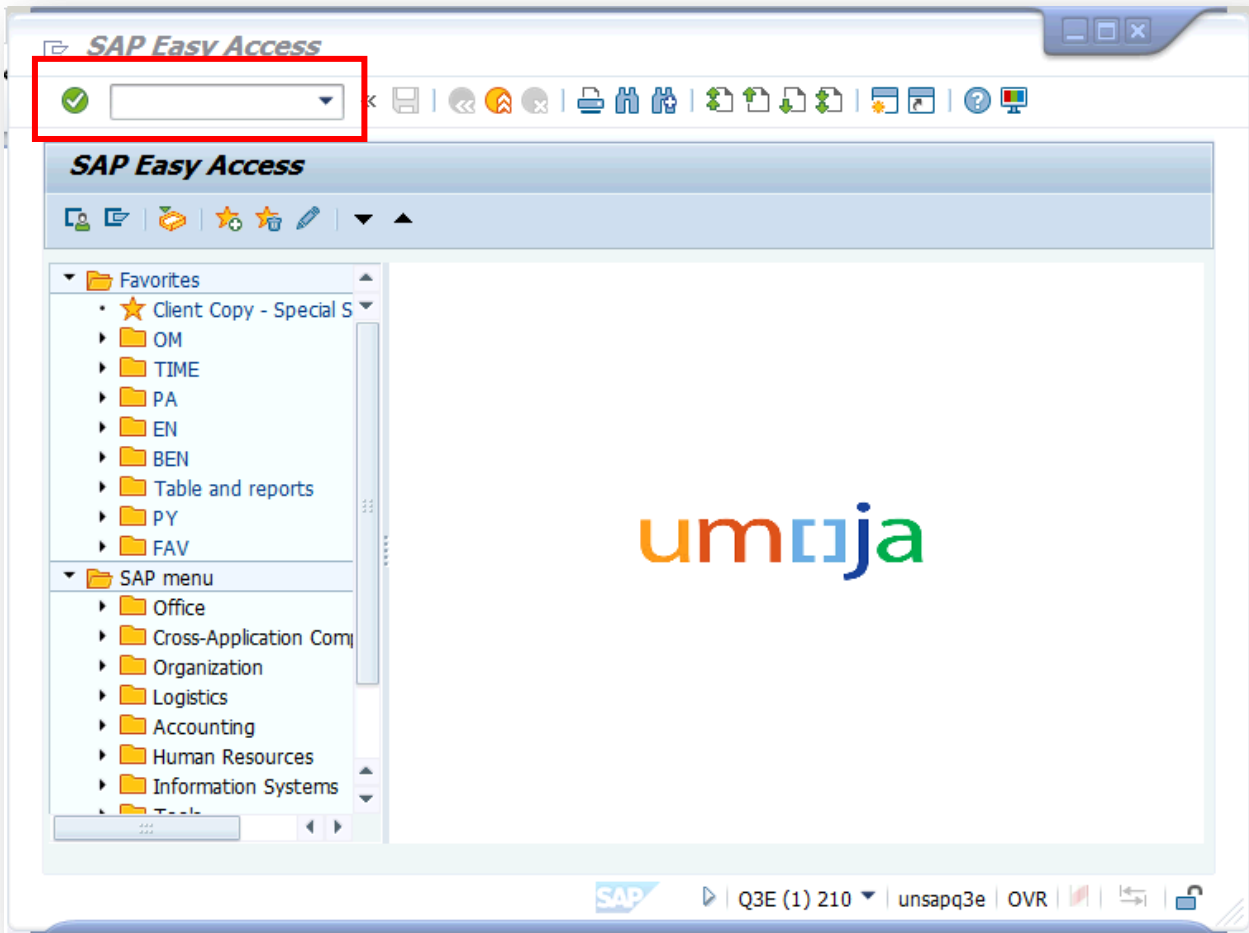
30. Log off.

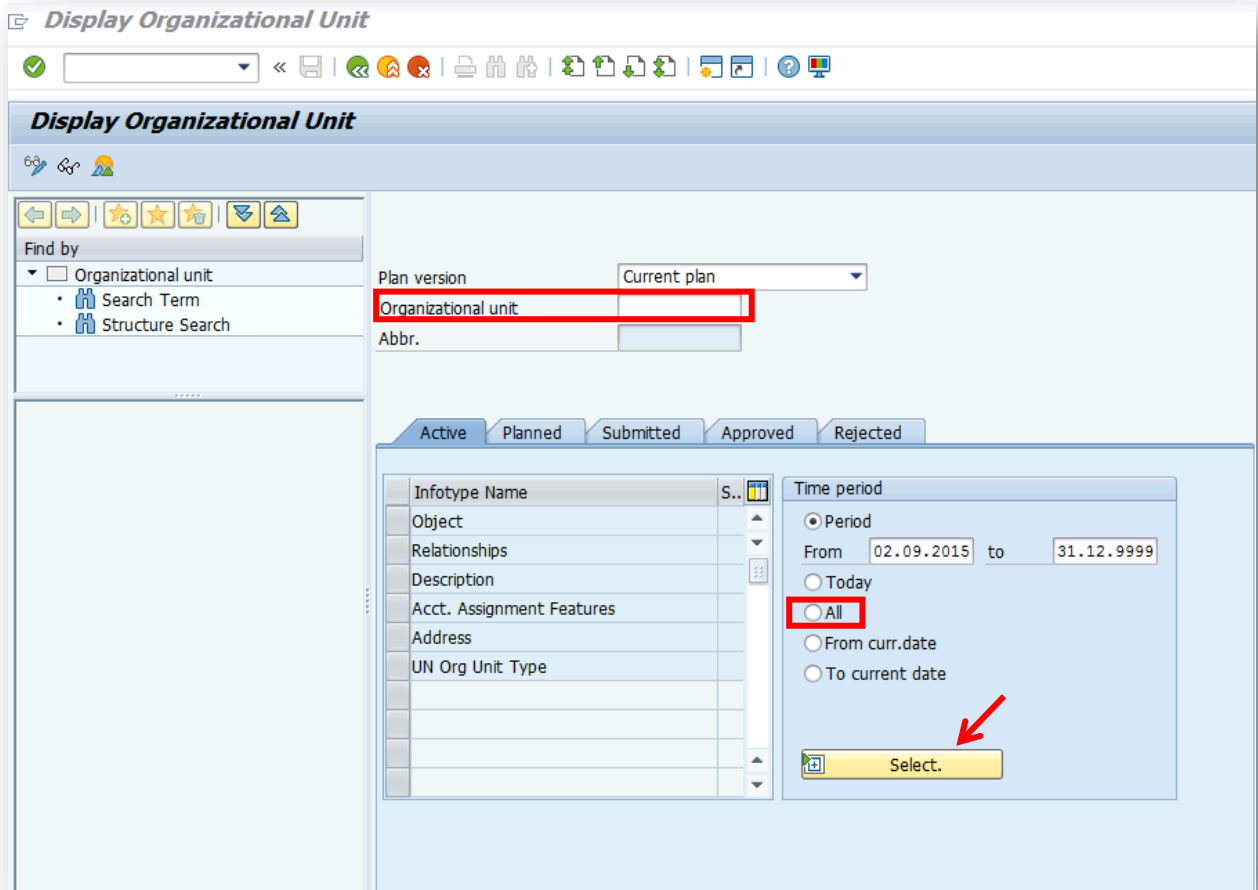31. In ECC, enter your password as OM Administrator which brings this screen:
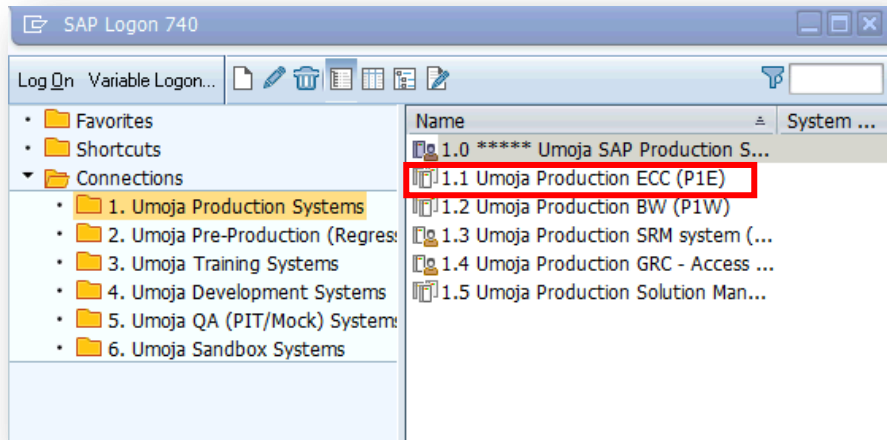
32. Click on Umoja Production ECC on the right column which brings this screen:
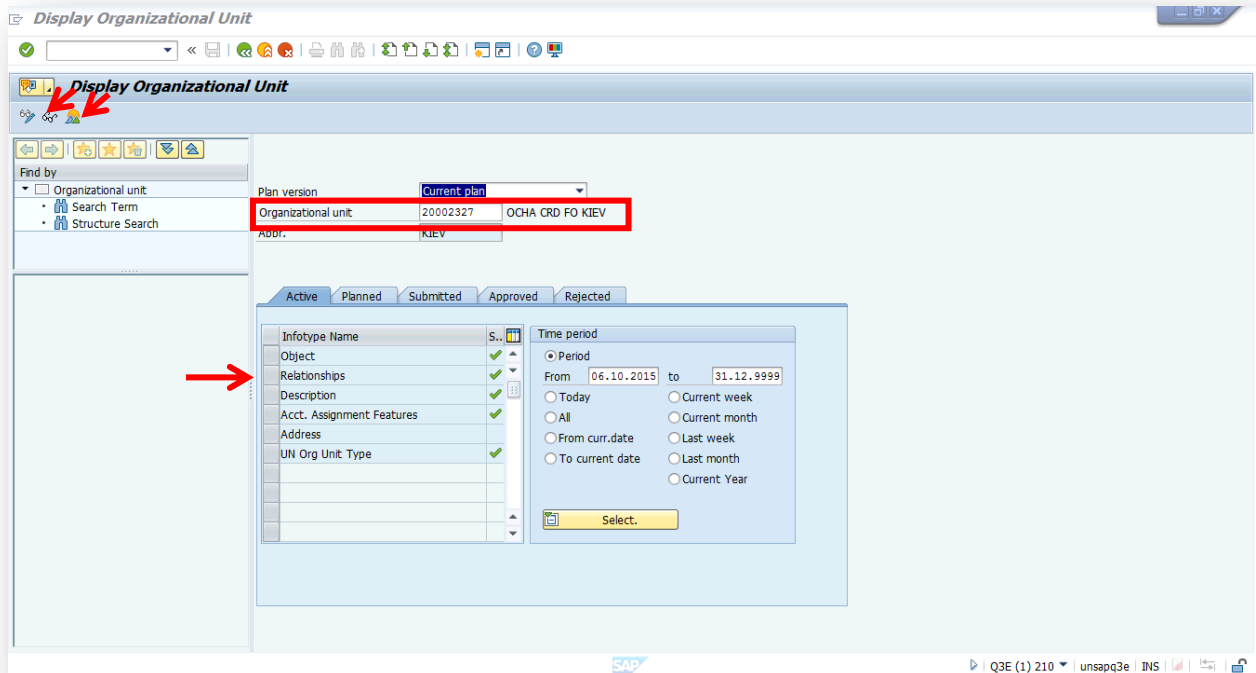

33. In the screen above, type your User ID and password which brings this screen.

34. In the screen above, type in the T-Code "PO10D" (Display Organizational Unit) and press enter which opens this screen:

35. In the screen above, type the org unit created, e.g. 20002327, in the Organizational unit box, click on "All" and click Select which displays information in the screen below.

36. Ensure that all info types entered in the portal are reflected in ECC correctly by viewing each Infotype Name.

37. In the screen above, click on the Infotype Name, Relationship, and click on 👓 icon under *Display Organizational Unit* which opens this screen:
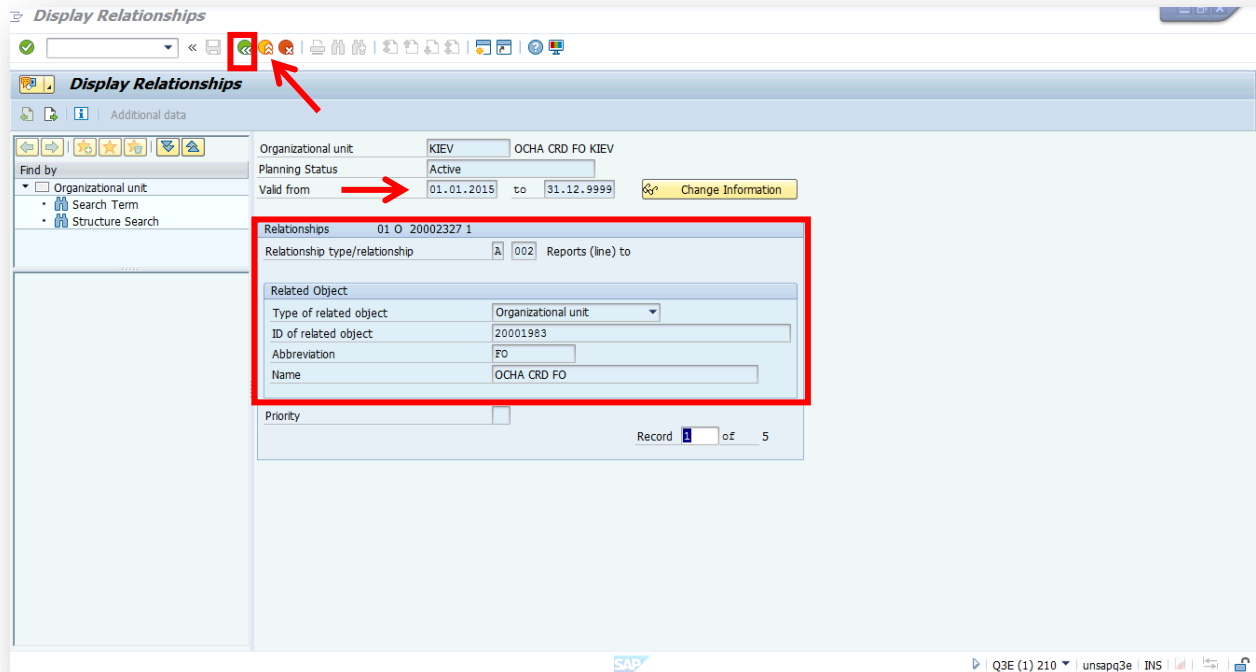
38. The screen above shows that the start date and the reporting relationship of org unit 20002327 to its new parent org unit, 20001983, OCHA CRD FO are as entered in the Portal.

39. In the screen above, click on the ⏪ icon which will take you back to Step 34.

40. In the screen below Step 34, click on the Infotype Name, Description, and check that information entered in the Portal is in ECC.

41. Log off from ECC by clicking the 🔼 icon.