Overview

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

Governing Policies

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

1. **Positions created and controlled by OPPBA and OAHs** are established posts (fund 10UNA), temporary posts and GTA posts funded by the peacekeeping support account (fund 20QSA), GTA Finite Duration for Special Political Missions and GTA Finite PK for Peacekeeping Missions;
2. **Positions created and maintained by Entities** are funded by Voluntary Contributions (VC) formerly known as extra-budgetary (XB), General Temporary Assistance (GTA) replacement and Temporary Assistance for Meetings (TAM), etc. Please refer to the complete list of position types in the OM Create Position with Funding Job Aid on page 2.

II.   Changes in Position type

1. Positions funded by GTA funds are created as GTA replacement or GTA Finite Duration or GTA Finite PK.
2. Positions funded by Voluntary Contributions (VC), formerly known as extra-budgetary (XB), are created as VC project positions or VC posts.

Please refer to the Policies on Position Maintenance for:

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

Position rules for positions controlled by OPPBA

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

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

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

ALL		

Geography: Transfer across Personnel Area (country) change

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

Function: Change of Functional title

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

Level: Change of Budgeted Grade

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

Legend

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

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

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

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

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

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

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

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

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

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

** PKMs and PK Support Account

*** Same Grade refers to budgeted grade where the range FS1-FS6 (FSOL) are considered same grade. Similar for GS and LL.
    Changes to titles within these ranges, while approved by OPPBA may be subject to HR policies and classification

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Job Aid Objectives

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

- Know what positions your enterprise role can maintain;
- Maintain positions;
- Understand the significance of the required fields/infotypes in maintaining positions;
- Check that all infotypes entered in the Portal is reflected in ECC.

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

Procedure

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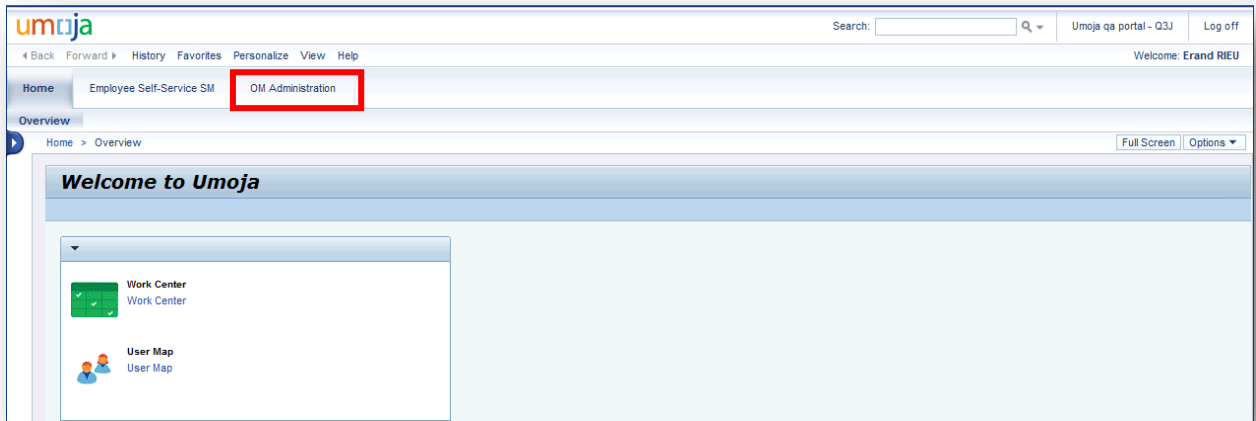
2. In the screen above, click on OM Administration which opens this screen:

3. In the screen above, click on OM Processes which opens this screen.
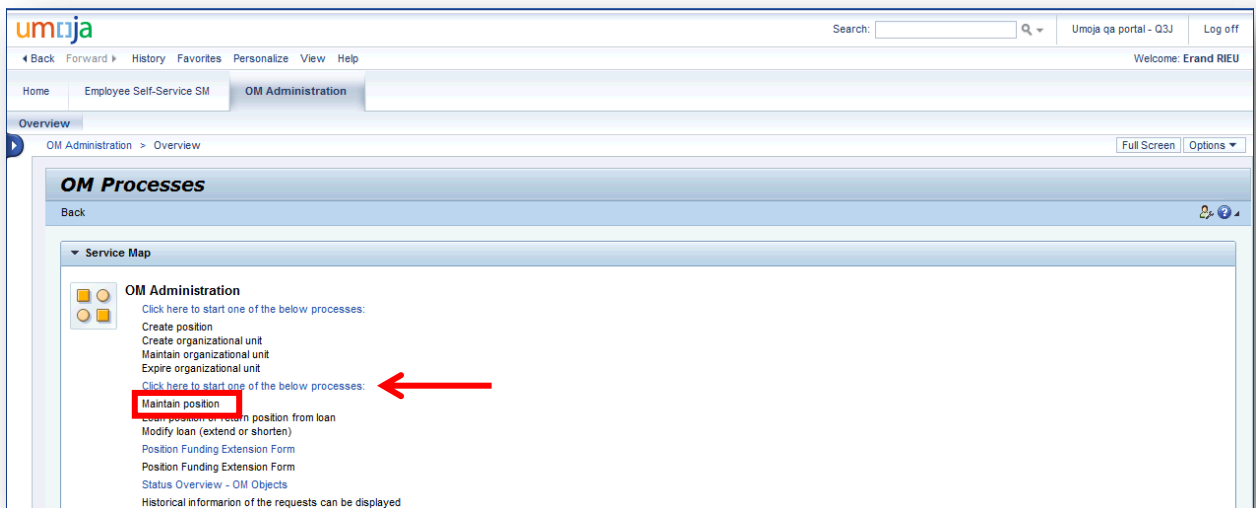
4. In the screen above, click on the blue line of text above "Maintain position" which opens this screen:

5. In the screen above, scroll down to the Organizational Structure (Department or Office) where you need to maintain a position in 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 GDS AFRICA II) which opens this screen:

Note that in the example above, OCHA is below ECLAC. The available objects in the Organizational Information displayed on the right belong to OCHA.

6. In the screen above, click on the row that shows the details of the position in the table (Example highlighted: 31003231) and click Next which opens this screen:
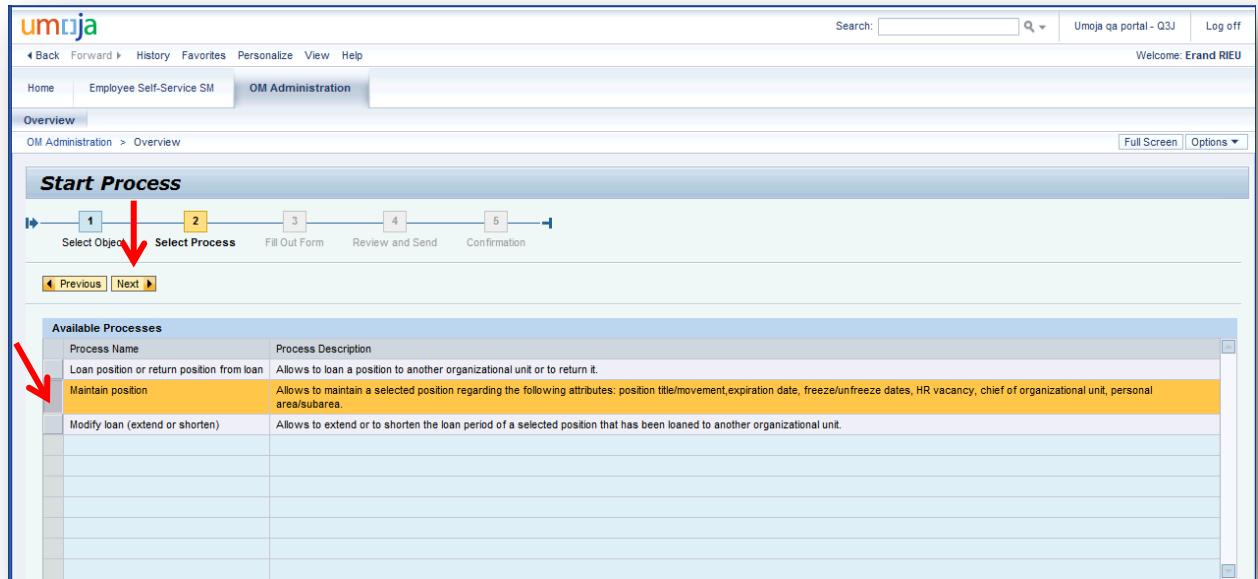
7. In the screen above, click on Maintain position and click Next which opens this screen:

   Maintain Position – Position Title/Movement

Please note that the two screens above are one. The entire screen cannot be captured in one shot.

8. In the screen above with the <u>Position Title/Movement selected</u> in the Option to Maintain Position, click on the Search button on the right of the "New Organizational Unit" field which opens this screen:
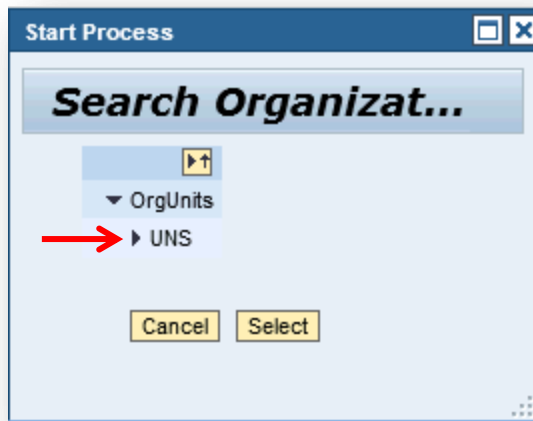
9. In the screen above, click on the ▶ icon before "UNS" which brings the hour glass and eventually opens this screen:

Start Process

Search Organizatio...

▸▴

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

10. In the screen above, scroll down to find OCHA as shown in this screen:

Start Process

- ▶ UNEP
- ▶ IIC NY
- ▶ Ma. Lourdes ADVINCULA
- ▶ N'dakon AHIZI
- ▶ Syed AHMED
- ▶ Mohamed Sharif AHMED
- ▶ John BINDA
- ▶ ECA
- ▶ ECE
- ▶ ECLAC
- ▶ CCST
- ▶ UNODC
- ▶ Alan AKISTOY
- ▶ Sameer AL SANABANI
- ▶ Angelika ALI
- ▶ Borino BEAUGE
- ▶ Diamilatou DIOP
- ▶ ESCAP
- ▶ ESCWA
- ▶ OHCHR
- ▶ OCHA
- ▶ Administered ESCAP
- ▶ Athalie **USE INDEX 853652 FOR ATHALIE M
- ▶ Bernard ABWOGA
- ▶ Mouayad Ibrahim Kadhum AL-WINDAWI
- ▶ Vassili ARDATOVSKI
- ▶ Anthony BARZELATTO
- ▶ DM
- ▶ DPI
- ▶ UNOG
- ▶ UNOV
- ▶ UNON
- ▶ Mahmoud ALMAZAYDEH
- ▶ Jasser ALSHAHED
- ▶ S.m. Ali AZAM
- ▶ Aruwa BENDSEN
- ▶ Mika DIOP
- ▶ UNJSPF ECEO
- ▶ UNMOVIC
- ▶ OIOS
- ▶ OIP
- ▶ Administered UNON

11. In the screen above, click on the ▶ before OCHA to open its organizational structure and click on OCHA CRD then OCHA CRD GDS as shown in this screen:
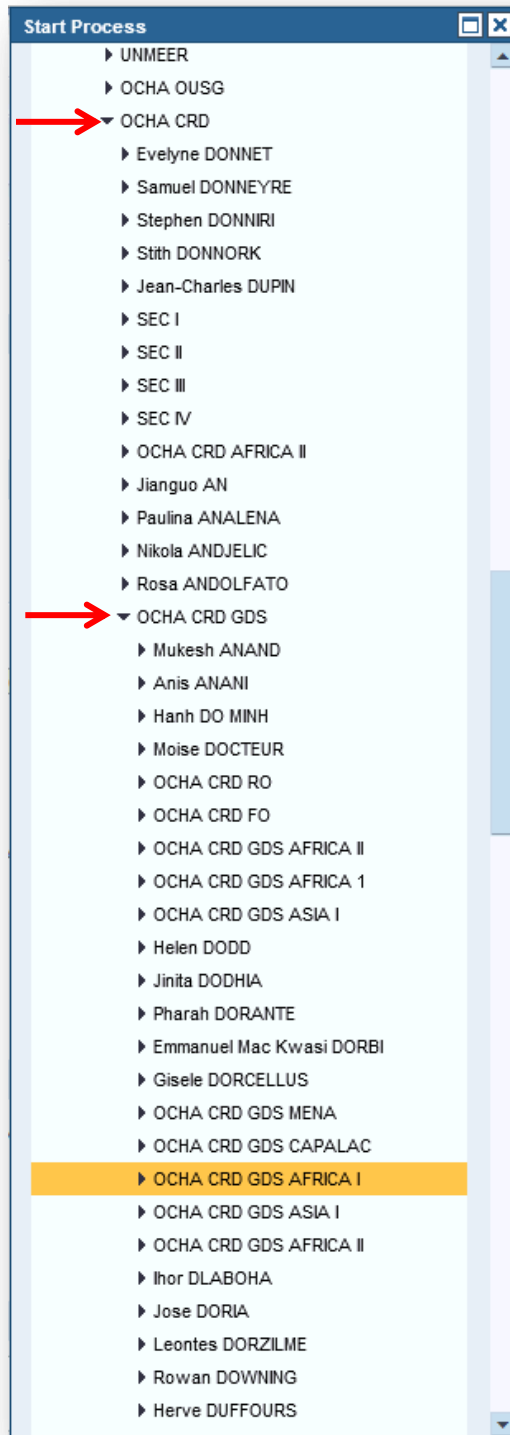
12. From the populated OCHA organizational tree in the screen above, click on OCHA CRD GDS AFRICA I then scroll all the way down and click on the Select button (not shown in the screen) which brings this screen:

Important: OM Administrator may move a position within the same budget section, OCHA CRD GDS, and the same country, Kenya.

In the case of Established and Temporary positions, OM Administrators may loan a position across the level of budget control.

OPPBA decided that centrally managed org units are determined based on the level of a department's/office's organizational chart presented to member states in the budget fascicle. As an example, please refer to page 28 of GA document A/70/6 (Sect. 27) for OCHA's 2016-2017 org chart.

To illustrate further, please refer to this chart which also applies to Temporary peacekeeping support account positions:

Established Positions – Move or Loan

Established positions		
	Budget **control is at** **Division** level	Budget control is at Section level
Position Management within budget control	**MOVE** within the Division	MOVE within the Section
Position Management across level of budget control	**LOAN across** Divisions	**LOAN across** Sections

Note that the position now belongs to the org unit 20010277 OCHA CRD GDS AFRICA I.

13. In the comments box above, type "Internal Reorganization", "MSS Maintain Position" (This pertains to the manager for whom an OM Administrator maintains a position on behalf of.) and your name, e.g., "Erand Rieu" as shown in this screen:

14. If the position's **operational title** has to be changed also, click on the Change Position Title binocular in the screen above which opens this screen:

15. In the screen above, type in the "Short Text" field, for example, ADM or HRA or LOG, etc. and in the "Name" field, type as an example P3*Admin* and click Start Search which opens this screen:

16. If necessary, scroll down until you find the needed position title, click on it and click the "Select" button which changes the position title as shown in this screen:

17. In the screen above, Scroll back up and click the "Next" button as shown in this screen:

18. After clicking on the Next button, note the process progressed to 4 Review and Send and the "Send" button appears in this screen:
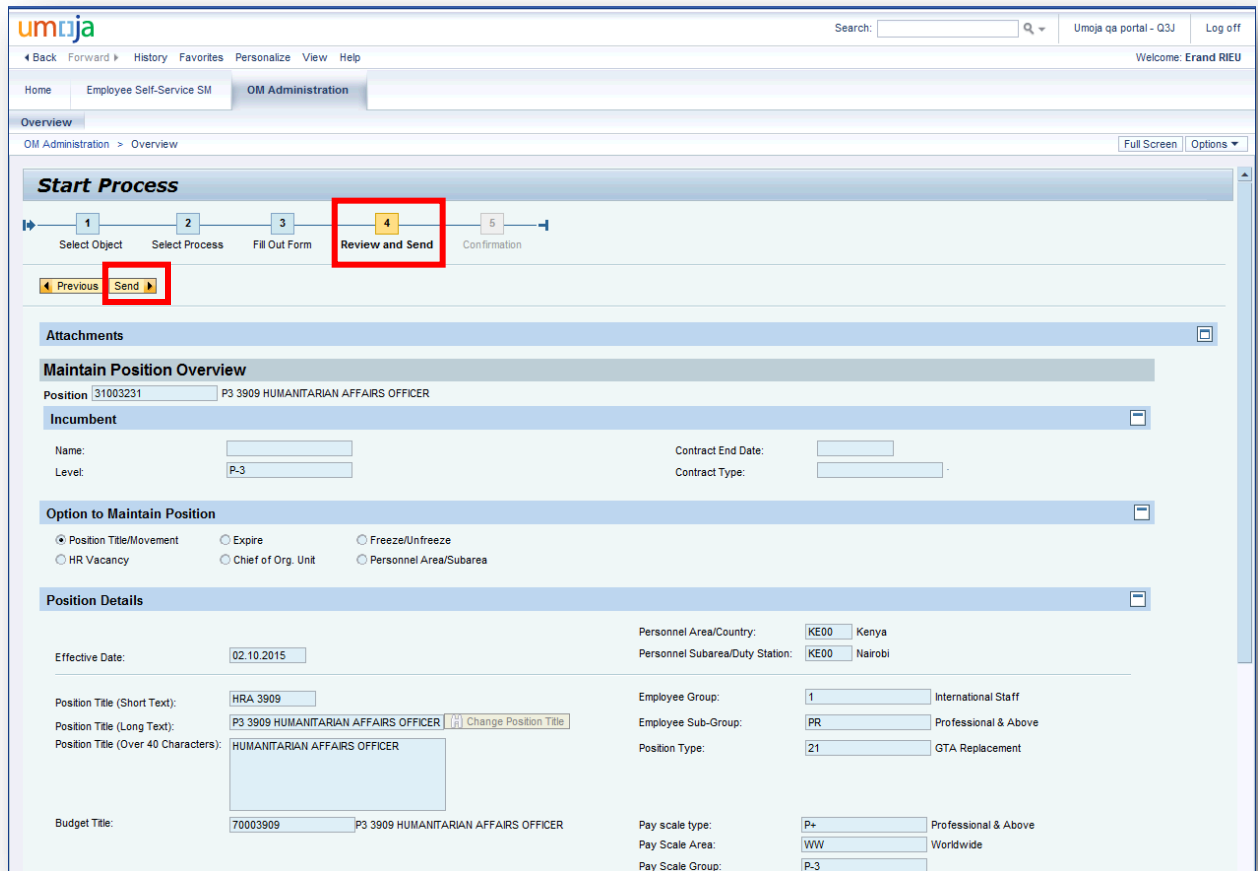
19. Review the Maintain Position Overview and click the "Send" button which opens this screen:
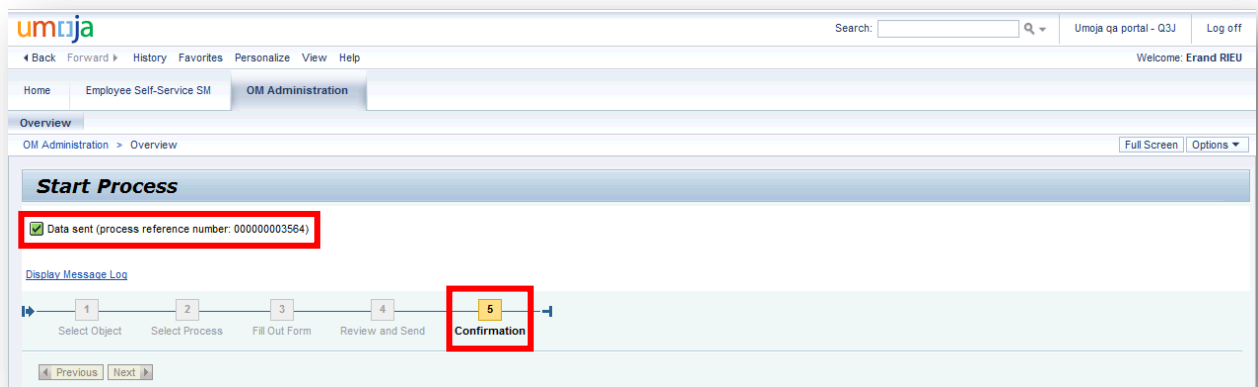
Note that the process progressed to "5 Confirmation" and the process reference number has been created and displayed.

20. Repeat Steps 4-6 above to select a position then click Next which opens this screen:

Maintain Position - Expire

Please note that the three screens above are one. The entire screen cannot be captured in one shot.

21. In Part I of the screen above with the <u>Expire selected</u> in the Option to Maintain Position, note that in Part III of the screen, the Expire Position fields show. In the "Expire Date" field, enter the date.
22. In the "Reason for Expiration" field, enter the reason for the new Expire Date.
23. In the OM Administrator Comments box, enter "MSS Maintain Position" (This pertains to the manager fro whom an OM Administrator maintains a position on behalf of.) and your name. e.g., "Erand Rieu" as shown in this screen:

24. Scroll back up and click on the "Next" button.

After clicking on the Next button, note the process progressed to "4 Review and Send" and the "Send" button appears in the above screen.

25. Review the Maintain Position Overview and click on the "Send" button which opens this screen:

Note that the process progressed to "5 Confirmation" and the process reference number has been created and displayed.

26. Repeat Steps 4-6 above to select a position then click Next which opens this screen:

Maintain Position – Freeze/Unfreeze

Please note that the three screens above are one. The entire screen cannot be captured in one shot.

27. In Part I of the screen above with the <u>Freeze/Unfreeze selected</u> in the Option to Maintain Position, note that in Part III of the screen above the Freeze/Unfreeze fields show. In the Start Date field, enter the date when the position is frozen.
28. In the End Date field, enter the date until when the position is frozen.
29. In the Choice of Action field, click on the down arrow and select "Freeze".
30. In the OM Administrator Comments box, enter "MSS Maintain Position" and your name as shown in this screen:
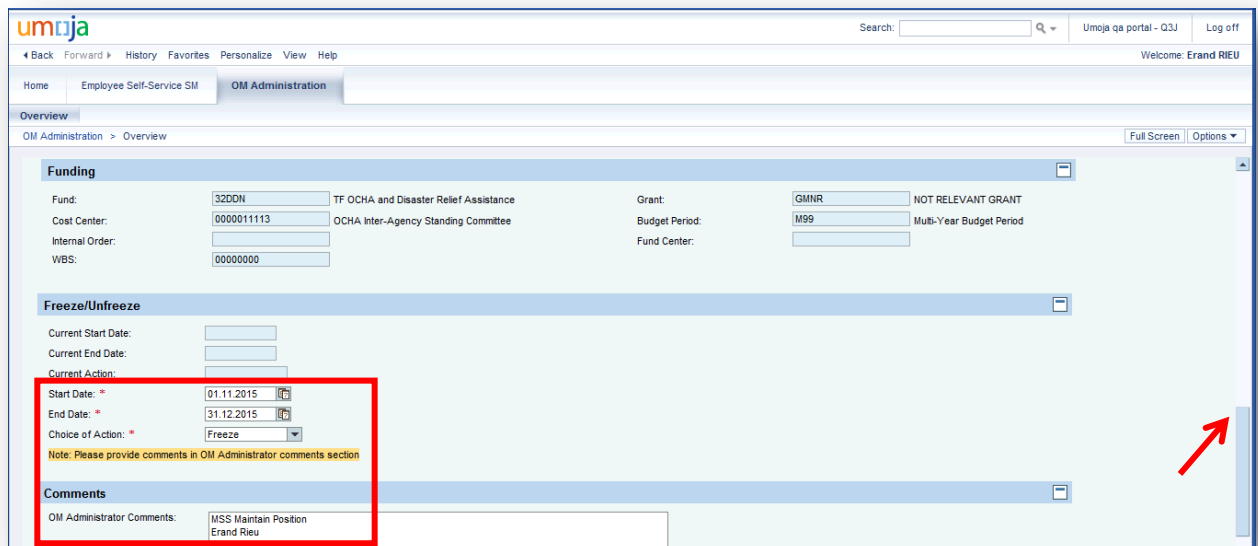
31. Scroll back up and click the "Next" button which opens this screen:
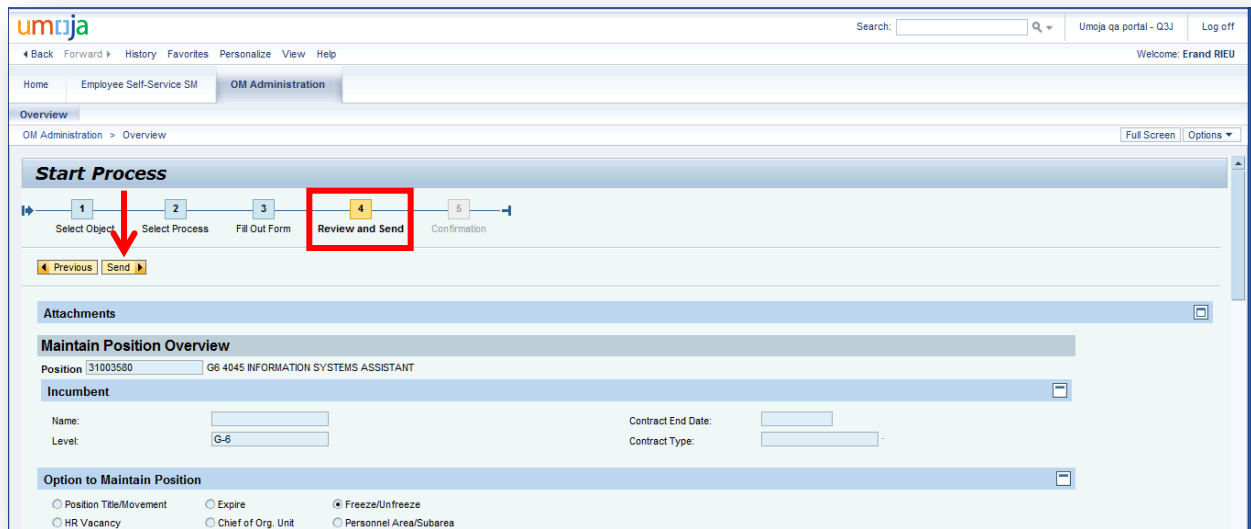
After clicking on the Next button, note the process progressed to "4 Review and Send" and the "Send" button appears.

32. Review the Maintain Position Overview and click the "Send" button which opens this screen:
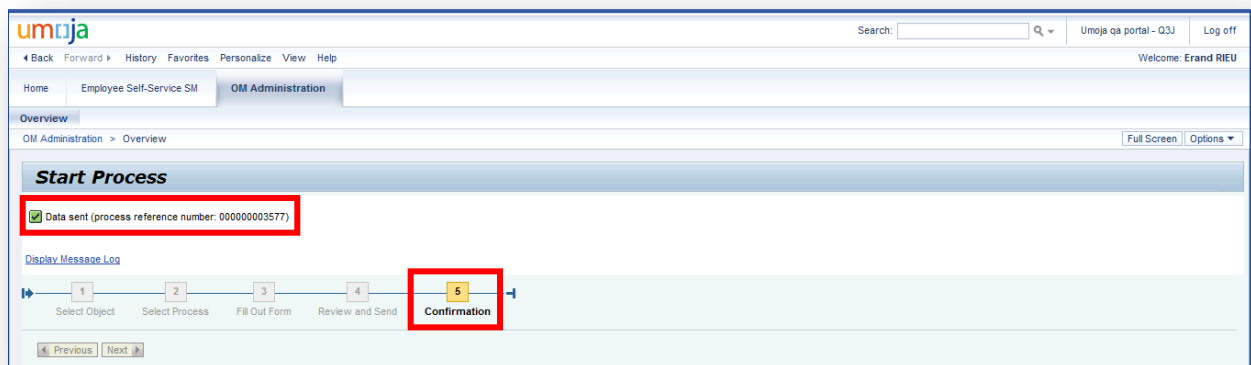
Note that the process progressed to "5 Confirmation" and the process reference number has been created and displayed. Once the position is frozen, no staff member could be placed against that position for the period it is frozen.

33. Repeat Steps 4-6 above to select a position then click Next which opens this screen:

Maintain Position – HR Vacancy

Please note that the three screens above are one. The entire screen cannot be captured in one shot.

34. In the screen above with the <u>HR Vacancy selected</u> in the Option to Maintain Position, note that in Part III of the screen above the HR Vacancy fields show. In the Effective Date field, enter the date when the position becomes an HR Vacancy.

35. Note that the Vacancy Flag defaults to "Vacancy filled". Click on open.

   **Important: If the position has an incumbent, Umoja would give an error message that position has an incumbent and cannot be vacant.**

36. In the OM Administrator Comments box, enter "MSS Maintain Position" (This pertains to the manager for whom an OM Administrator maintains a position on behalf of.) and your name, e.g., Erand Rieu, as shown in this screen:

37. Scroll back up and click the "Next" button which opens this screen:

After clicking on the Next button, note that the process progresed to 4 Review and Send and the "Send" button appears in this screen:

38. Review the Maintain Position Overview and click the "Send" button which opens this screen:
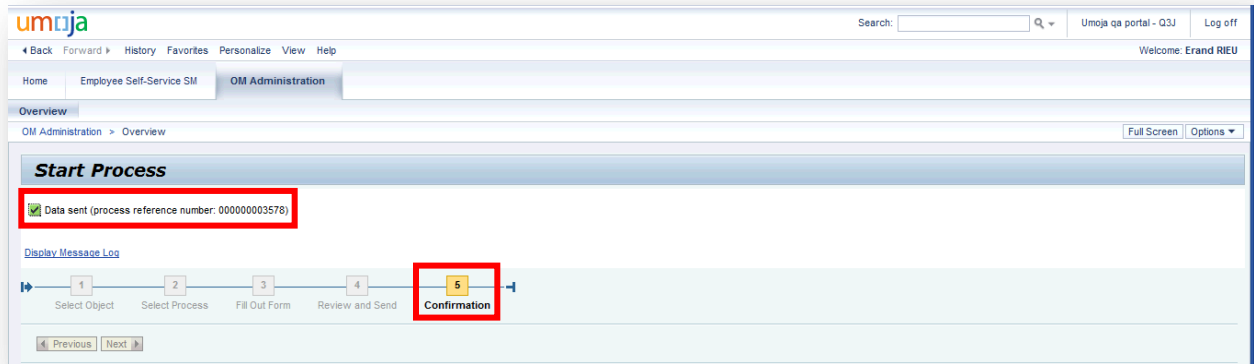
Note that the process progressed to "5 Confirmation" and the process reference number has been created and displayed.

39. Repeat Steps 4-6 above to select a position then click Next which opens this screen:

   Maintain Position – Chief of Org Unit
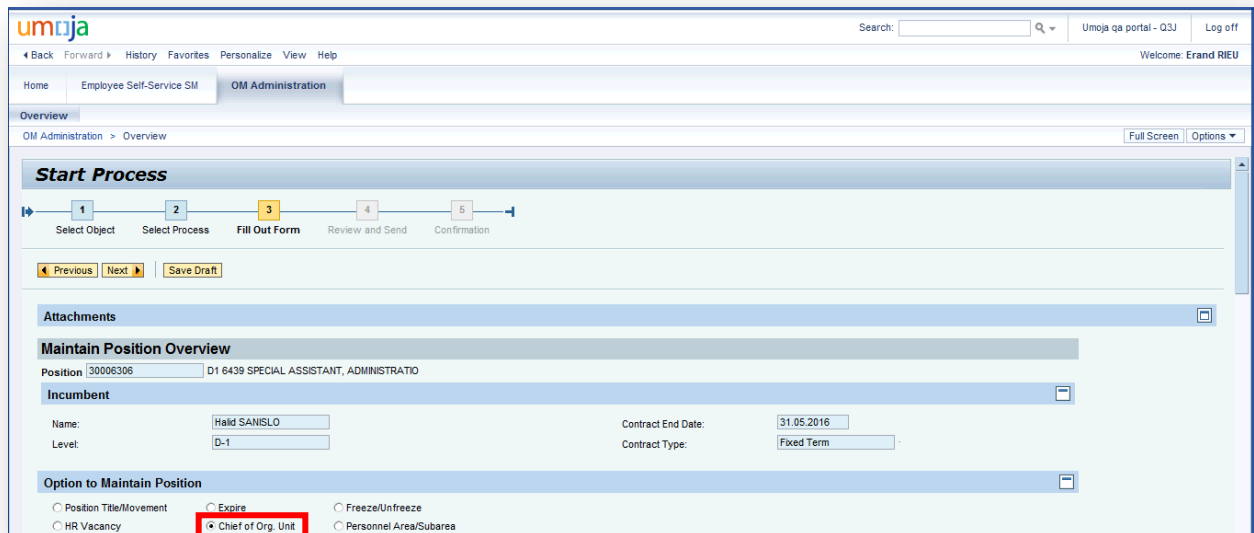
Please note that the three screens above are one. The entire screen cannot be captured in one shot.

40. In the screen above with the <u>Chief of Org Unit selected</u> in the Option to Maintain Position, note that in Part III of the screen above the Chief Relationship Creation fields appear and the Action defaults to "Create". In the Effective Date field, enter the date when the position becomes the Chief of Org Unit and the end date.
<u>Furthermore, change the default org unit to the org unit where the position belongs. Otherwise, the Chief of Org Unit is automatically assigned to the higher org unit.</u>

41. In the OM Administrator Comments box, enter MSS Maintain Position (This pertains to the manager for whom an OM Administrator maintains a position on behalf of.) and your name,

e.g., "Erand Rieu" as shown in this screen. Scroll back up and click the "Next" button which opens this screen that shows the completed Chief Relationship Creation fields and comments:


42. Review the information entered. In part I of the screen above, click on the button "Send" which opens this screen:

**Note that the process progressed to "5 Confirmation" and the process reference number has been created and displayed.**

43. Repeat Steps 4-6 above to select a position then click Next which opens this screen:

Maintain Position – Personnel Area/Subarea

Please note that the three screens above are one. The entire screen cannot be captured in one shot.

44. In Part I of the screen above with the <u>Personnel Area/Subarea selected</u> in the Option to Maintain Position, note that in Part III of the screen above the Personnel Area/Subarea fields appear. In the Personnel Area field, click the Search Help icon on the right of "KE00" which opens this screen:
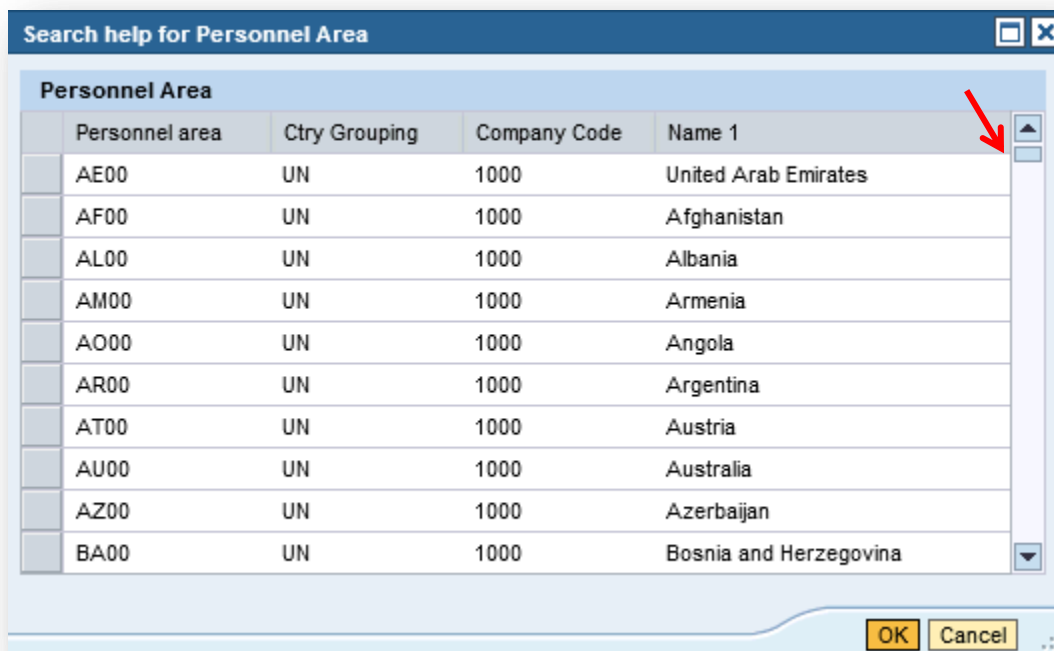
45. In the screen above, scroll down and select the new Personnel Area, e.g., USA.

Note that this position is funded by a Trust Fund (OCHA and Disaster Relief Assistance). Therefore, the position is a voluntary contributions (VC) position. In this case, an OM Administrator may make a geographical change of position.

46. In the Personnel Sub Area, click on the down arrow which opens this screen:
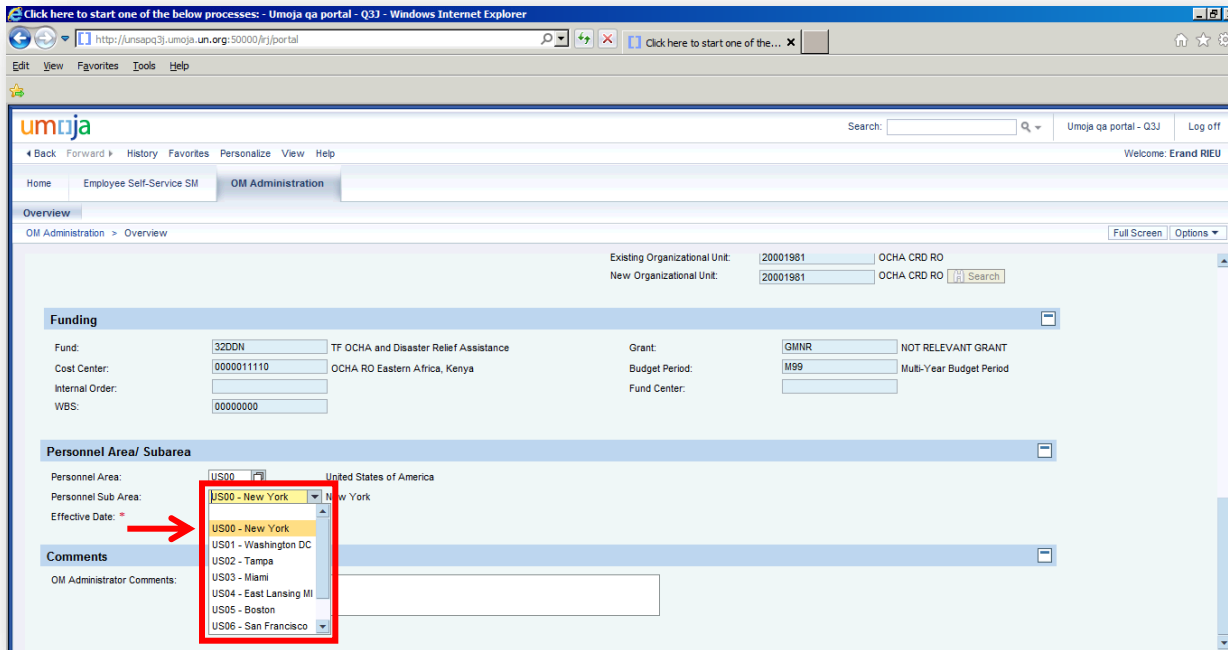
47. Click on US00 – New York, enter the effective date and the OM Administrator Comments as displayed in this screen:
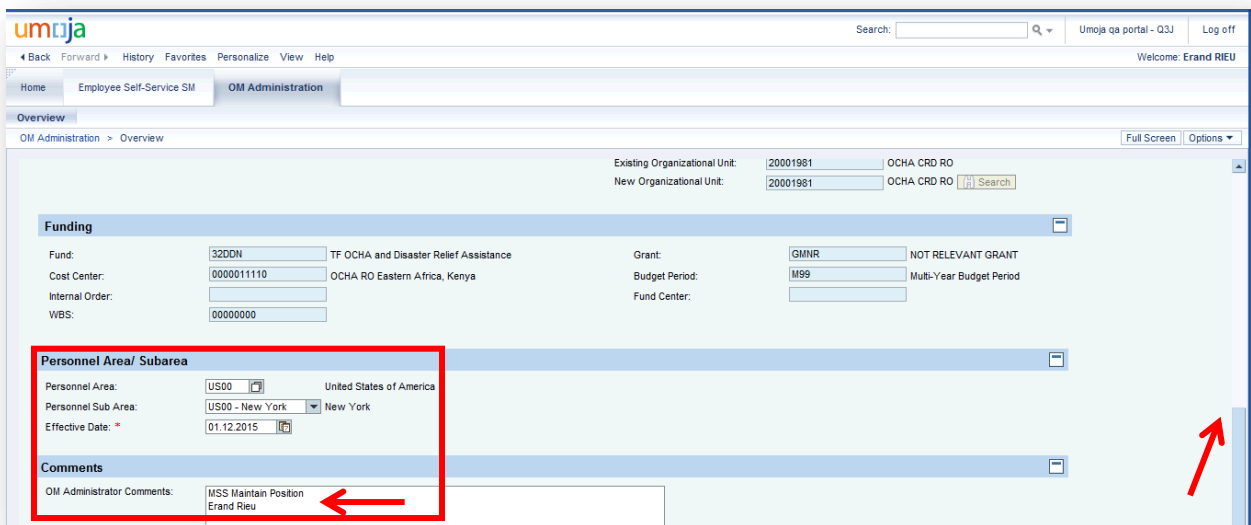
48. Scroll back up and click on Next.
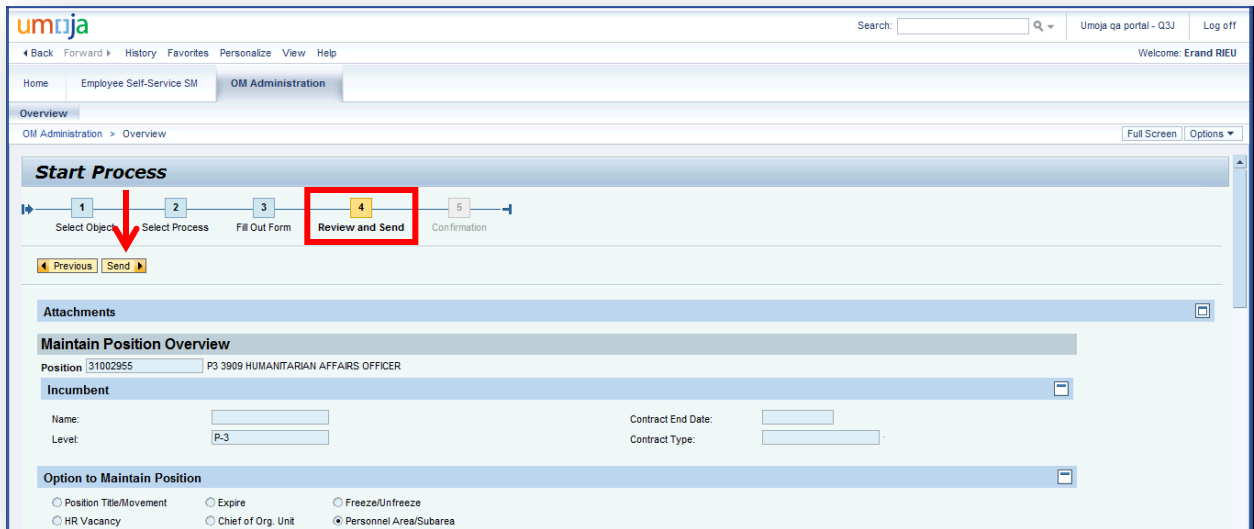
49. Review the information entered. In part I of the screen above, click on the button "Send" which opens this screen:
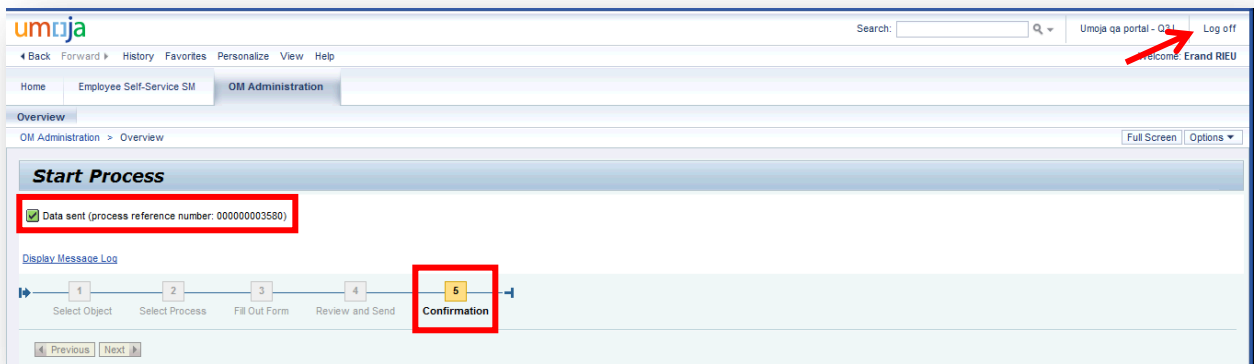
Note that the process progressed to "5 Confirmation" and the process reference number has been created and displayed.

50. In the screen above, log off.

51. Log in ECC as OM Administrator which opens this screen:
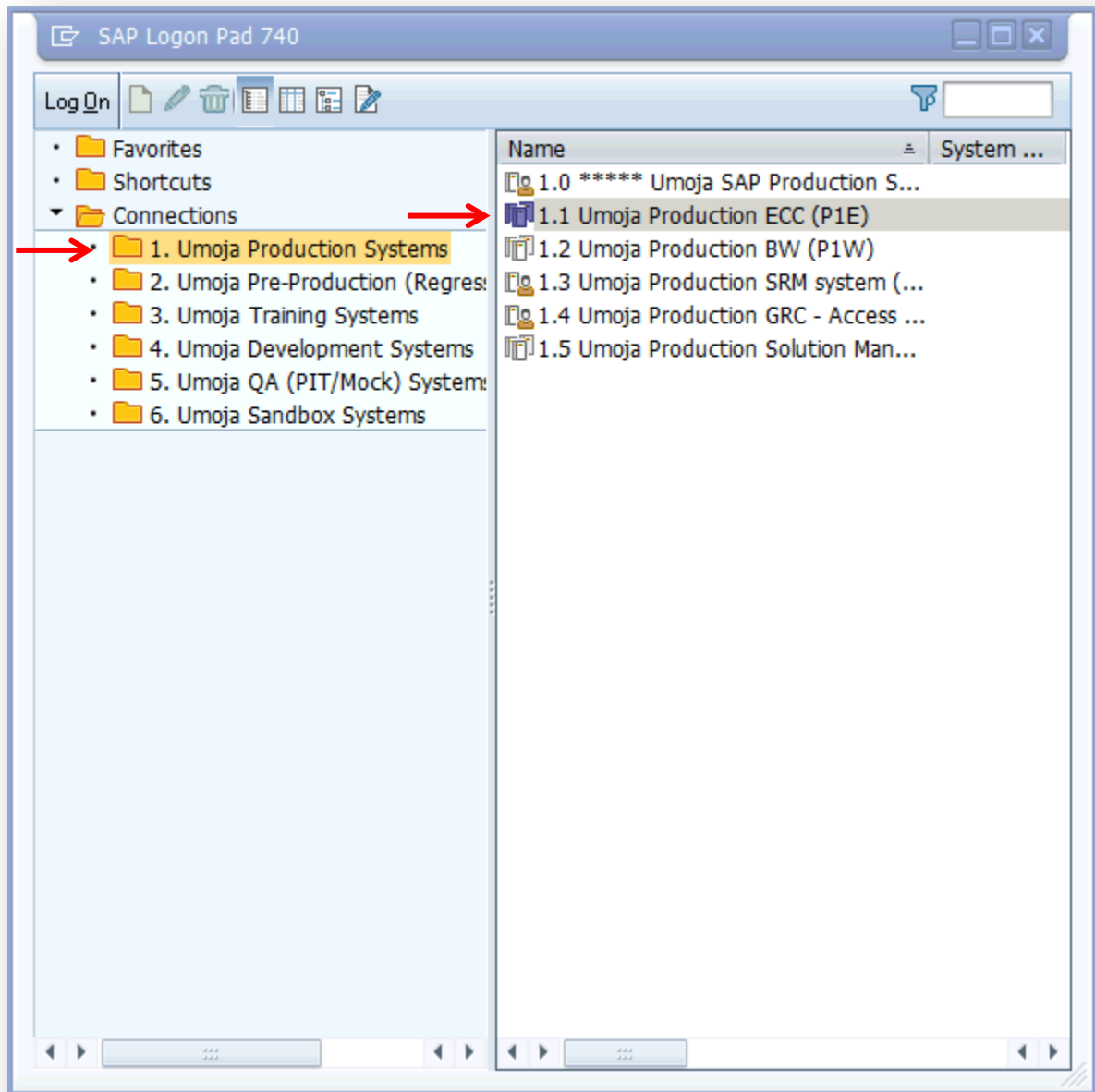
52. In the screen above, click on "1.1 Umoja Production ECC (P1E)" which brings this screen:
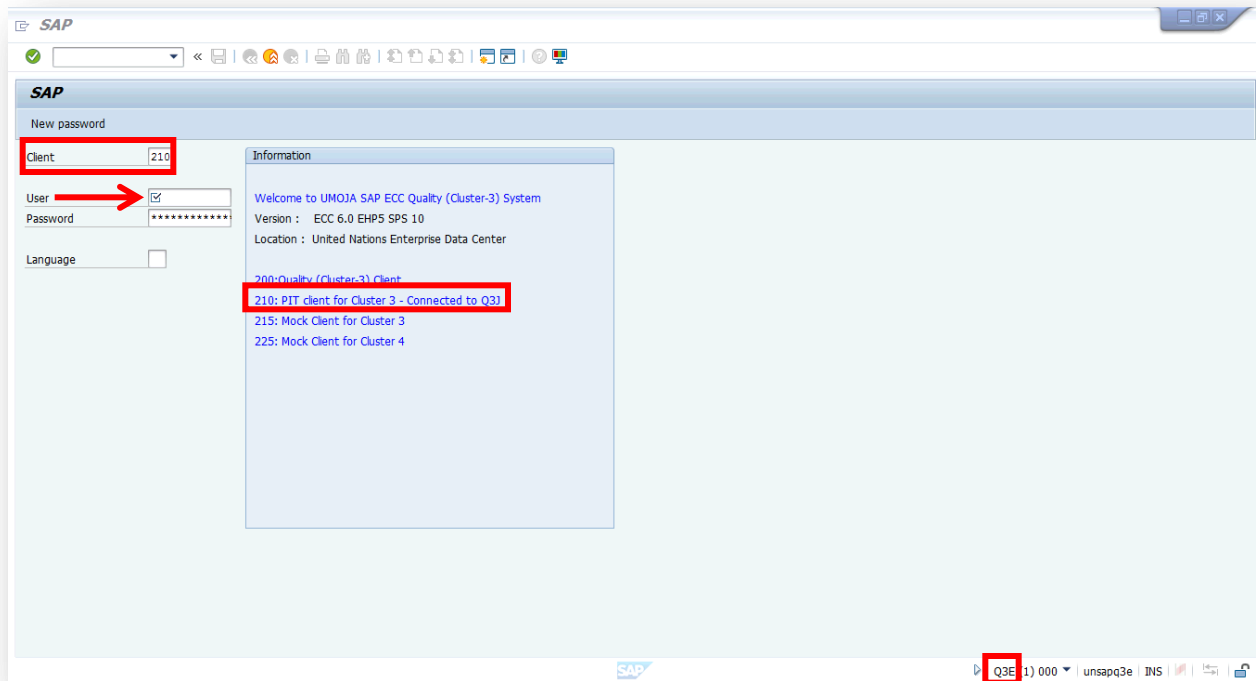
Note that for purposes of preparing this Job Aid, we used the testing environment, Q3E (bottom right of the screen), Client 210: PIT . . . Connected to Q3J, the Portal (top left of the screen and in the "Information" box in the center).

53. In the screen above, enter your User ID and password which opens this screen:

54. In the screen above, type in [ ] the transaction code "PO13D" (Display Position) and click on the ✓ .

which opens this screen:
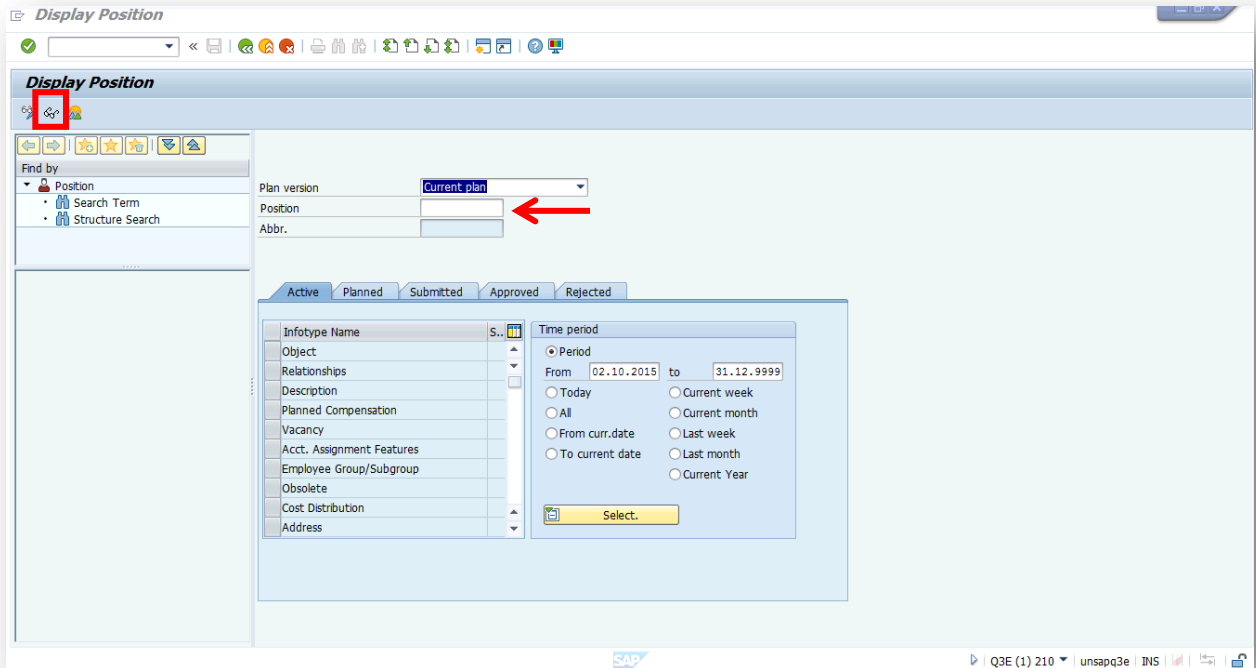
55. In the "Position" field in the screen above, type the position number (31003231) that was moved to a new organizational unit in the Portal and click on ⚭ icon which opens this screen:
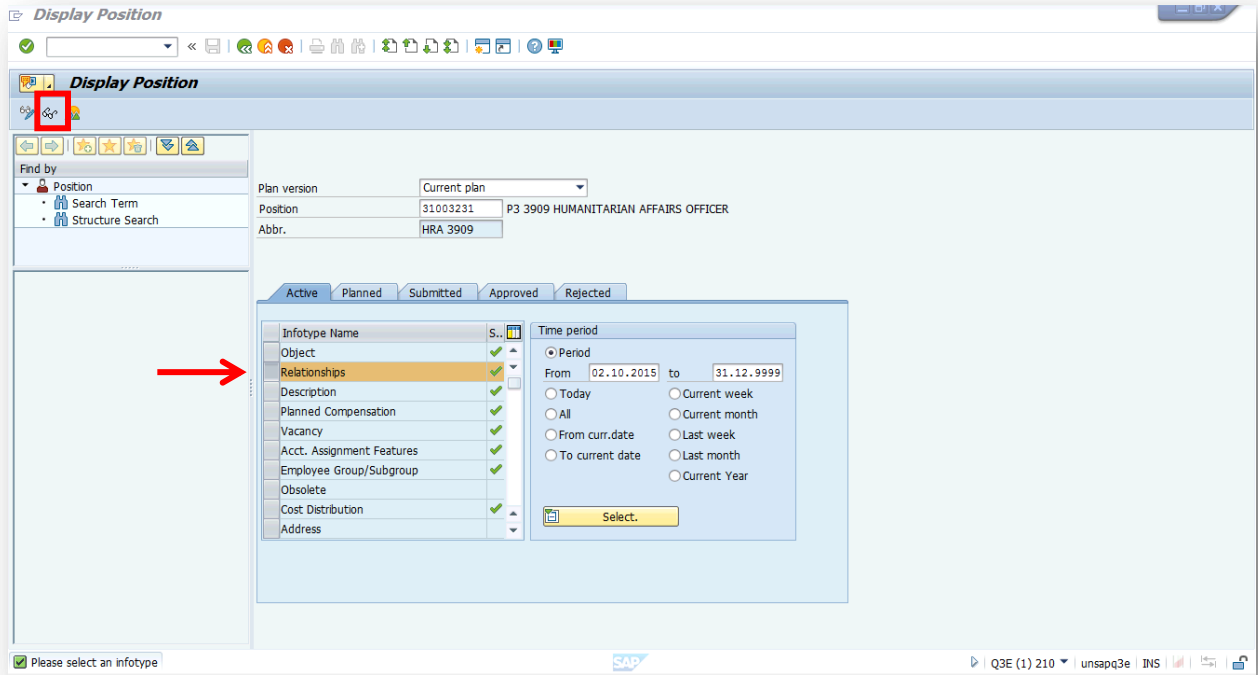
56. In the screen above, click on the "Infotype Name" Relationships and click on the icon which opens this screen:
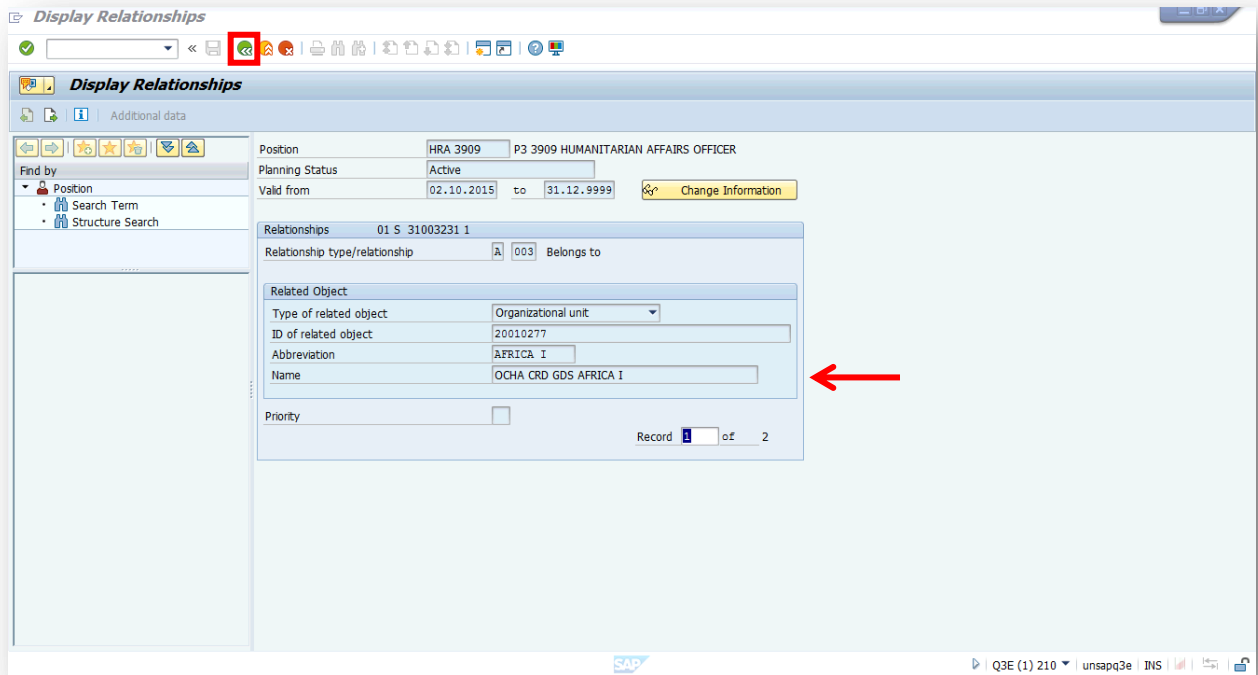
Note that the position is in the organizational unit OCHA CRD GDS AFRICA I as executed in the Portal.

Important: The example here pertains to the Maintain Position – Position Movement only. Checking the other Maintain Position options (ref. Steps 19 to 49) to ensure that information entered in the Portal are reflected in ECC require the selection of the appropriate Infotype Name. For example, Vacancy for the HR Vacancy option. Please refer to the Guide on pages 42-45 for the rest of the Maintain Position options.

57. In the screen above, click on ⟨⟨ which reopens this screen:
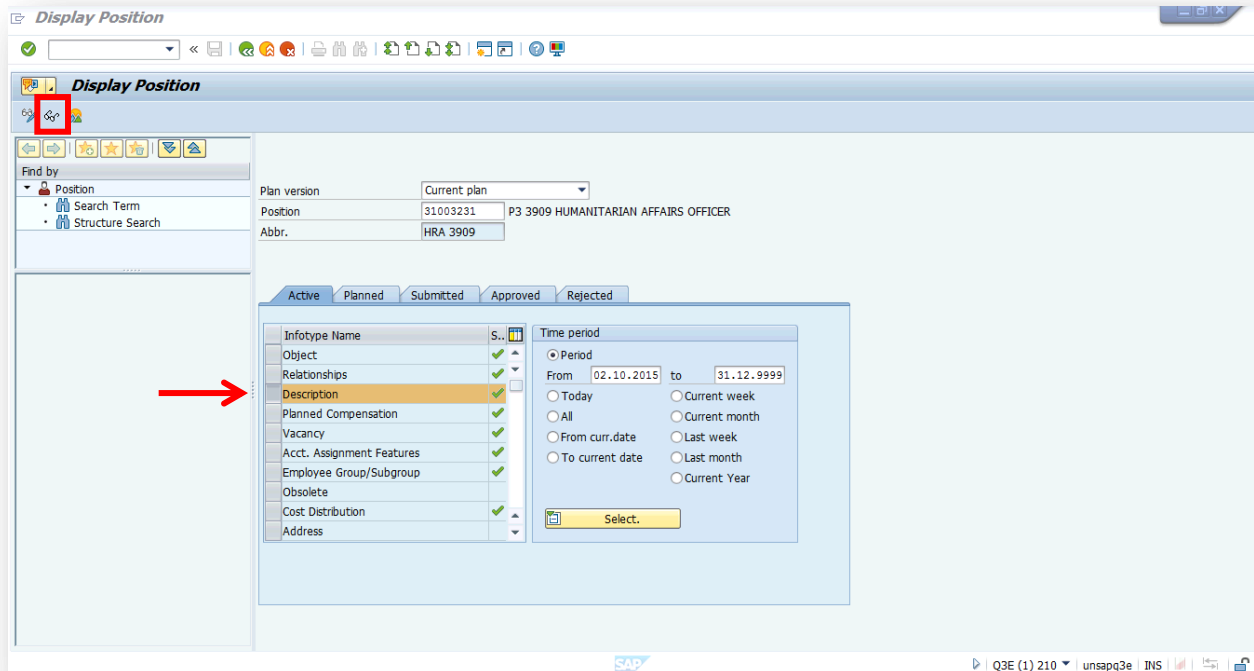
58. In the screen above, click on the "Infotype Name" Description and click on the 👓 icon which opens this screen:
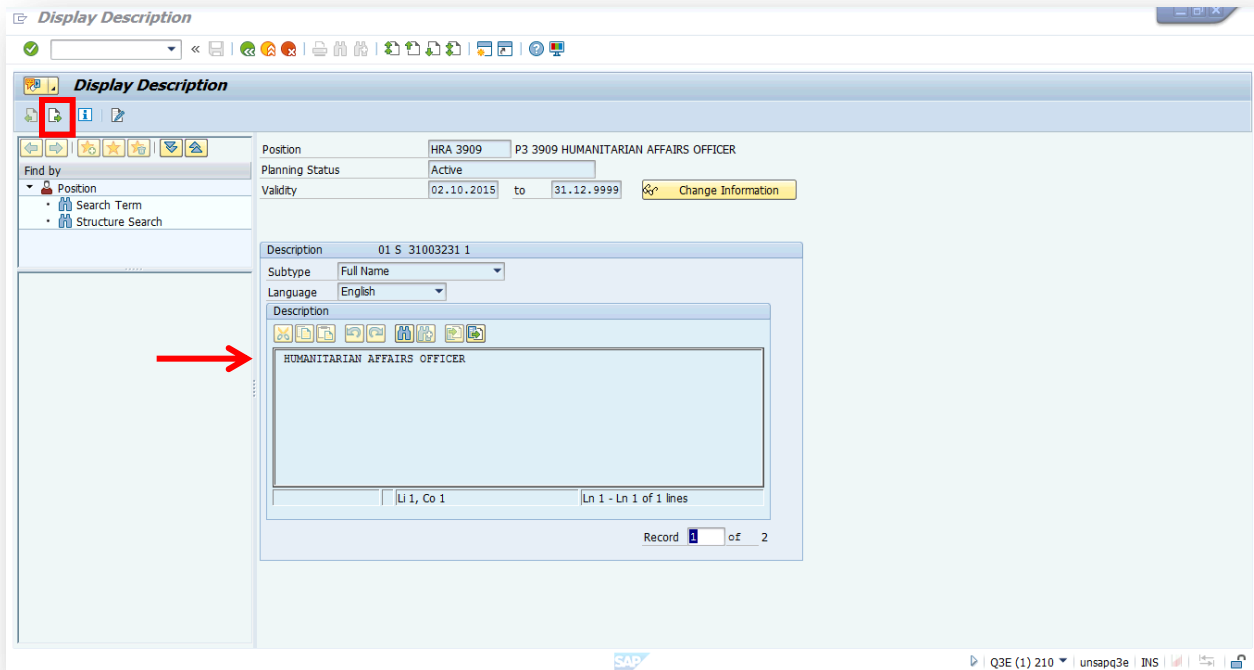
Note that the correct title of the position is shown.

59. In the screen above, click on the icon underneath the *Display Description* that opens this screen:
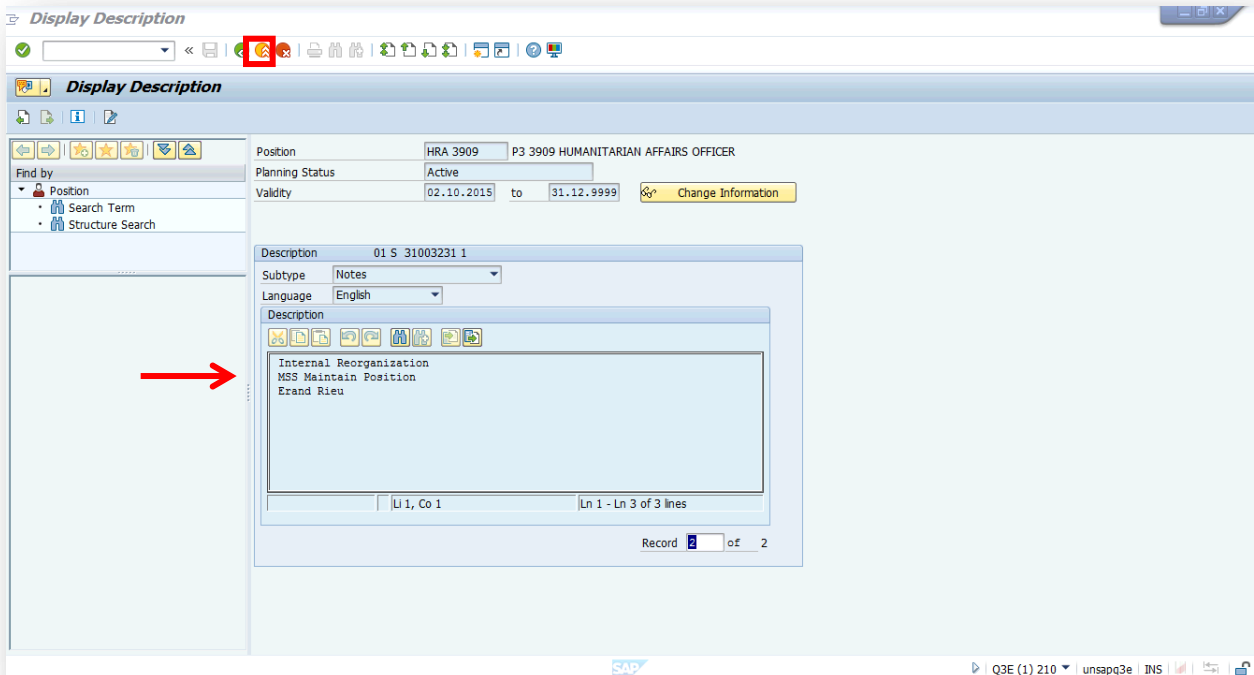
Note that the Comments entered in the Portal is shown in ECC.

60. In the screen above, click on the icon <u>twice</u> which opens this screen:

Log Off

Unsaved data will be lost.
Do you want to log off?

Yes   No
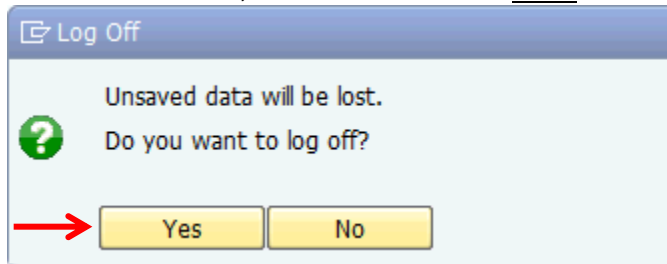
61. Click on "Yes" to log off from ECC.

Guide on which Infotype in ECC to check for:

Position operational title and org unit (simple move)

Note: The Portal screen is on the left, and the ECC screen is on the right.

Position expiration

Position freeze/unfreeze and HR vacancy

Position Chief of Org and modify personnel sub/area