

Umoja Portal - Screen Elements

Quick Criteria Maintenance:

- To facilitate searching for pending or completed tasks, you can use the Quick Criteria Maintenance queries available in work areas such as Work Overview and under most of the Approver Work Center tabs.
- You need to click Show Quick Criteria Maintenance to display the query fields.

Approver Work Center									
Draft	Returned	OM Pending Items	OM Completed Items	PA Pending Items	PA Completed Items	Time Pending Items	Time Completed Items	Entitlements Pending Items	
▶ Show Quick Criteria Maintenance									
View: * [Standard View] ▼						Review and Approve		Display	Refresh
Subject	Initiator Name	Sent Date	Effective Date	Priority	Status				
Approve Family Data Change Request of Employee 20007205	Ying OTILIA	17.02.2015	17.02.2015	5 Medium	Ready				
Approve Family Data Change Request of Employee 20007205	Ying OTILIA	17.02.2015	17.02.2015	5 Medium	Ready				
Approve Family Data Change Request of Employee 20001202	WICKMAN WICKMAN	29.12.2014	29.12.2014	5 Medium	Ready				
Approve Family Data Change Request of Employee 20000337	Hilton BUEHRLE	29.12.2014	29.12.2014	5 Medium	Ready				
Approve Family Data Change Request of Employee 20001202	WICKMAN WICKMAN	29.12.2014	29.12.2014	5 Medium	Ready				
Approve Family Data Change Request of Employee 20000039	Ilhan KASA	29.12.2014	29.12.2014	5 Medium	Ready				
Approve Family Data Change Request of Employee 20000515	Franklin MALTZ	26.12.2014	26.12.2014	5 Medium	Ready				
Approve Family Data Change Request of Employee 20000039	Ilhan KASA	25.12.2014	25.12.2014	5 Medium	Ready				
Approve Family Data Change Request of Employee 20002525	Chas HAUSTEEN	24.12.2014	24.12.2014	5 Medium	Ready				
Approve Family Data Change Request of Employee 20002525	Chas HAUSTEEN	24.12.2014	24.12.2014	5 Medium	Ready				
Approve Family Data Change Request of Employee 20000551	Donat DURIAN	24.12.2014	24.12.2014	5 Medium	Ready				

Umoja Portal - Screen Elements

Quick Criteria Maintenance:

- Under the Hide Quick Criteria Maintenance each field can be used as filter or query parameter to facilitate searching of a specific task or a group of tasks
- Query parameter can be used individually or combined (i.e. Organization Unit, Effective Date and Process Name).
- Don't forget to remove your query parameter if no longer required to avoid your list of tasks appearing incomplete

The screenshot shows the 'Approver Work Center' interface. At the top, there are tabs for 'Draft', 'Returned', 'OM Pending Items', 'OM Completed Items', 'PA Pending Items', and 'PA Completed Items'. Below the tabs is a section titled 'Hide Quick Criteria Maintenance' with a dropdown arrow. This section contains a form with various search criteria:

- Process Ref. Number: [Text Field] To [Text Field] [Yellow Arrow]
- Process Name: [Text Field] [Copy Icon]
- Subject: [Text Field]
- Initiator: [Text Field] [Copy Icon] To [Text Field] [Copy Icon] [Yellow Arrow]
- Sent Date: [Text Field] [Calendar Icon] To [Text Field] [Calendar Icon] [Yellow Arrow]
- Effective Date: [Text Field] [Calendar Icon] To [Text Field] [Calendar Icon] [Yellow Arrow]
- Priority: [Text Field] [Copy Icon] To [Text Field] [Copy Icon] [Yellow Arrow]
- Status: [Text Field] [Copy Icon] To [Text Field] [Copy Icon] [Yellow Arrow]
- Org. Unit: [Text Field] [Copy Icon] To [Text Field] [Copy Icon] [Yellow Arrow]
- Master Org. Unit: [Text Field] [Copy Icon]
- Affected Employee: [Text Field] [Copy Icon] To [Text Field] [Copy Icon] [Yellow Arrow]

Below the form, there is a 'Calculated Dates' section and two buttons: 'Apply' and 'Clear'.

Umoja Portal – Filter and Setting

Filter and Setting:

- To sort the content of the columns displayed in the work area, click **Filter**
- The filter icon will appear
- Click on column name (i.e. Initiator name) to sort the column content

Approver Work Center

Draft | Returned | OM Pending Items | OM Completed Items | PA Pending Items | **Entitlements Pending Items** | Entitlements Completed Items | Travel Request Pending Items

Show Quick Criteria Maintenance Change Query Define New Query Personalize

View: [Standard View] | Review and Approve | Display | Refresh Filter Settings

Subject	Initiator Name	Sent Date	Effective Date	Priority	Status	Affected Employee
Approve Family Data Change Request of Employee 20007205	Ying OTILIA	17.02.2015	17.02.2015	5 Medium	Ready	ODMSD ODDMS C
Approve Family Data Change Request of Employee 20002525	Chas HAUSTEEN	24.12.2014	24.12.2014	5 Medium	Ready	MINUSTAH Civiliar
Approve Family Data Change Request of Employee 20001202	WICKMAN WICKMAN	29.12.2014	29.12.2014	5 Medium	Ready	MINUSTAH Civiliar
Approve Family Data Change Request of Employee 20000551	Donat DURIAN	24.12.2014	24.12.2014	5 Medium	Ready	MINUSTAH Civiliar
Approve Family Data Change Request of Employee 20000515	Franklin MALTZ	26.12.2014	26.12.2014	5 Medium	Ready	MINUSTAH Civiliar
Approve Family Data Change Request of Employee 20000337	Hilton BUEHRLE	29.12.2014	29.12.2014	5 Medium	Ready	MINUSTAH Civiliar
Approve Family Data Change Request of Employee 20000039	Ilhan KASA	29.12.2014	29.12.2014	5 Medium	Ready	MINUSTAH Civiliar

Umoja Portal – Filter and Setting

Filter and Setting:

- To change the work area layout click **Setting**
- Select a column you wish to display and click **Add** button
- Select column you wish to hide and click **Remove** button
- Change the column sequence clicking on **Change Sequence** button
- Click **Apply** to transfer your setting to the page layout then **OK** to confirm your selection

The screenshot displays the Umoja Portal interface. On the left, the 'Processes' window shows a table with the following data:

Process Name	Affected Employee	Started By
Maternity Leave - UN	Orinda MARTA	Orinda MA

Below the table are 'Details' and 'Refresh' buttons. On the right, the 'Settings' window is open, showing the 'Column Selection' and 'Displayed Columns' lists. The 'Add' and 'Remove' buttons are highlighted in red. The 'Change Sequence' button is also highlighted in red. The 'Apply' button is highlighted in red in the bottom bar.

Umoja Portal – Filter and Setting

Filter and Setting:

- Under the **Filter** tab in the **Setting** screen you can apply a filter to one available field of your choice
- Under the Display tab in the **Setting** screen, change the way columns are displayed on the table.

The image displays two screenshots of the Umoja Portal Settings interface. The left screenshot shows the 'Filter' tab selected, with a dropdown menu for 'Filter Column' open, listing fields such as 'Affected Employee', 'Business Status', 'Current Processor', 'Process Name', 'Process Status', 'Started By', and 'Started On'. The right screenshot shows the 'Display' tab selected, with settings for 'Displayed Rows' (1), 'Displayed Columns' (8), 'Table Design' (Alternating), and 'Grid Lines' (All).

Umoja Portal - Screen Elements

While each Form displays specific fields and features that will be described in the specific courses and modules, the next few slides describes generic fields and features used in most Forms

- **Data fields:** These are found on any Umoja ESS form. There are two types of data fields – **data entry** and **data display fields**
- **Data display fields** are read-only. They cannot be modified and generally appear grayed out, to indicate that it is currently disabled and cannot be selected.
- **Data Entry fields** generally appear “white” and are not grayed out. The most common used **data entry fields** are :

- ✓ **Numeric** fields (including Currency)
- ✓ **Date, Calendar** and **Time** fields
- ✓ **Text** fields (including multiple line text fields), which are free text and accommodate all kinds of characters

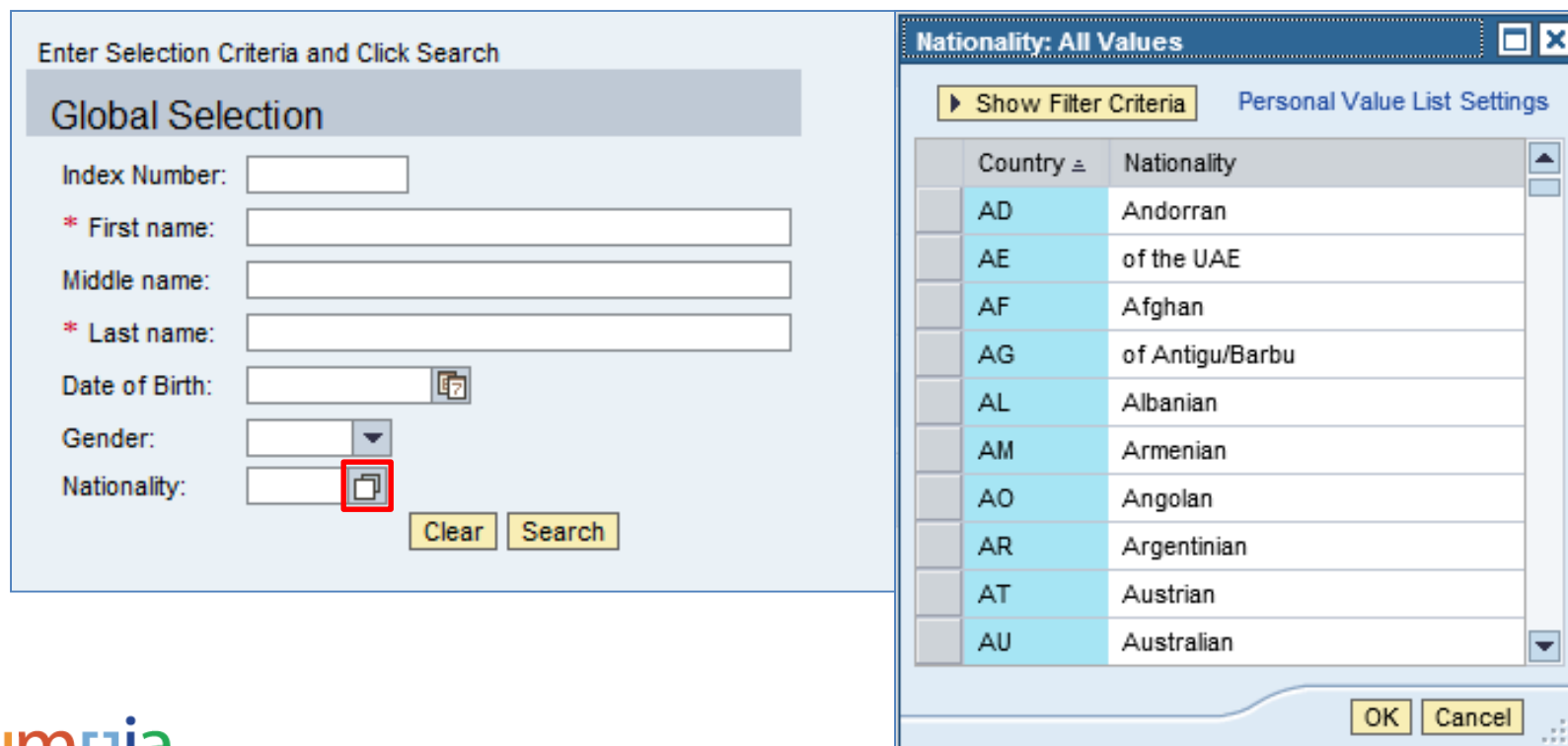
The screenshot shows a form for 'Maternity Leave' with the following fields:

- Type Of Absence: Maternity Leave
- Start Date: 01.07.2014 (annotated as Data entry (modifiable))
- Expected Delivery Date: 05.08.2014
- End Date: 20.10.2014 (annotated as Data display (not modifiable))
- Absence Days: 76.00
- Note To Approver: (empty text area)

Umoja Portal - Screen Elements

- **Matchcodes:** This button appears on the right side of fields with a search functionality. The matchcode search allows the user to filter possible entries for a field.
- When a **Matchcode** button is clicked, a pop-up window is displayed with all the possible options for that field.

In this example, all the possible nationalities are displayed.

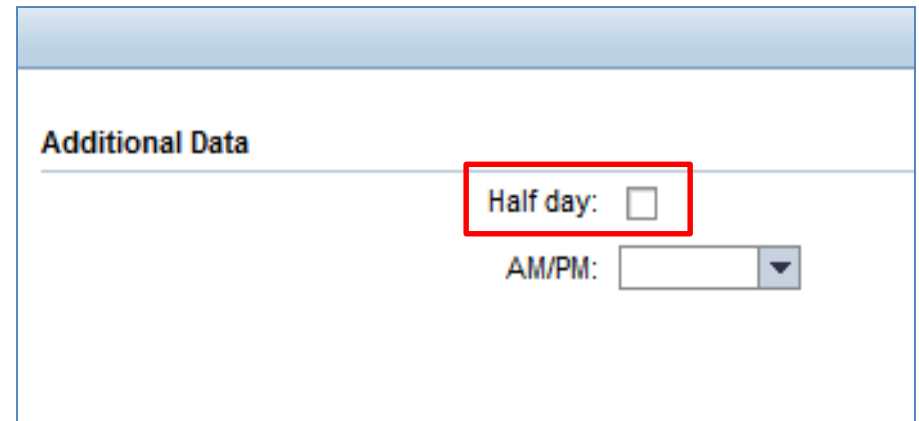
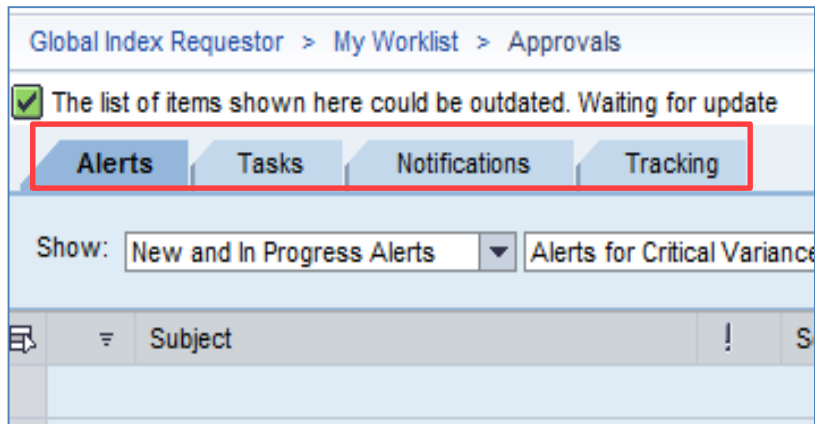


The screenshot shows a web form titled "Enter Selection Criteria and Click Search" with a "Global Selection" section. The form includes fields for "Index Number", "* First name", "Middle name", "* Last name", "Date of Birth", "Gender", and "Nationality". A red box highlights the Matchcode button (a small square icon with a magnifying glass) next to the "Nationality" field. Below the form are "Clear" and "Search" buttons. A pop-up window titled "Nationality: All Values" is open, showing a list of nationalities with columns for "Country" and "Nationality".

Country	Nationality
AD	Andorran
AE	of the UAE
AF	Afghan
AG	of Antigu/Barbu
AL	Albanian
AM	Armenian
AO	Angolan
AR	Argentinian
AT	Austrian
AU	Australian

Umoja Portal - Screen Elements

- **Tabs:** You can use tabs to enter, display and navigate from/to different screens.
- **Checkboxes:** A checkbox consists of a descriptive text and a square checkmark element. Clicking the checkbox selects or deselects the option described in the field text.



Umoja Portal - Screen Elements

- **Radio buttons:** Click on one radio button to select an option. Only one option can be chosen for a field that uses radio buttons.
- **Drop-Down:** You can click on a drop-down list to display available values. Click on one item to select a value from the list.

The screenshot displays a form titled "Birth Data" with the following fields:

- Gender: * (text input)
- Date of Birth: * (calendar icon)
- Country of Birth: (dropdown menu)
- Name at Birth: (text input)
- Birthplace: (text input)
- UN Nationality: * (text input)

The "Country of Birth" dropdown menu is open, showing a list of countries: South Africa, South Sudan, Spain, Sri Lanka, St Kitts&Nevis, St. Lucia, St. Vincent, Stateless, Sudan, and Suriname. The "Spain" option is highlighted and enclosed in a red box.

A "Validity" dialog box is open in the foreground, titled "Validity". It contains the text "Enter validity period for the information" and three radio button options: "Valid as of Today", "Valid From", and "Valid From/To". The "Valid From" option is selected and enclosed in a red box.

Umoja Portal - Types of Fields

A field in Umoja ESS can be required or optional:

- **Required fields:** These fields are necessary to complete a form and are typically indicated by an asterisk. Omitting a required field will produce an error message
- **Optional fields:** These fields are not necessary to complete the process, but offer additional information or are required by the internal business processes.

▼ Application Details


Application for: Child

Name

First Name: *

Middle Name:

Last Name: *



Note: Some fields affect other input fields. Depending on the value entered in a field, other fields may become required.

Umoja Portal - Screen Elements

- **Collapse/Expand Tray:** Used to minimize or expand windows that you can view within a screen. E.g. Attachment required in the **Maternity Leave** form is under a **Collapsed/Expand Tray** area called **Form Utilities**.

Fill Out Form Maternity Leave - UN

1 Fill Out Form 2 Review and Send 3 Confirmation

Previous Next Save Draft

Form Utilities

Maternity Leave Request

Name	Sonia OGONDO	Entry on duty Secretariat	01.10.2000
Personnel Number	00891891	Contract Type	Fixed Term
Duty Station	Santo Domingo	Contract End Date	30.06.2014
Department	MINUSTAH	Grade-Step	FS-4 /4

Umoja Portal - Screen Elements

Collapse/Expand Tray:

- In order to show the Tray, the **expand** button has to be clicked. The same button must be clicked to hide the tray.
- The attachment can be added by clicking the **Add Attachment** button.

Fill Out Form Maternity Leave - UN

1 2 3
Fill Out Form Review and Send Confirmation

Previous Next Save Draft

Form Utilities

Attachment

Certificate of Pregnancy

Add Attachment Delete Attachment