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.
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.
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
**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
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.
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
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.
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.

![Umoja Portal Screen Elements](image-url)
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.

**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**.
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.