



## EQUIPMENT ASSIGNMENT FOR PK/SPM MISSIONS





# DFS Umoja Reference Guide

## Table of Contents

EQUIPMENT ASSIGNMENT (Issue, Handover, Return) .....	2
Enterprise Roles .....	2
T-codes .....	2
Glossary .....	2
KEY STEPS - OVERVIEW .....	3
Step 1 – Create/Approve Notifications .....	3
Step 2 – Goods Issue (Only if the equipment is to be issued from inventory).....	3
Step 3 – Assign Equipment and document the Handover.....	4
Step 4 – Update Equipment Record and Asset Record* .....	6
Step 5 – Upload Documentation to a Notification. ....	6
KEY STEPS - DETAILS.....	8
Step 1 – Create/Approve Notifications.....	8
Step 2 – Goods Issue (Only if the equipment is to be issued from inventory).....	12
Step 3 – Assign Equipment and document the Handover.....	13
Step 4 – Update Equipment Record and Asset Record* .....	14
Step 5 – Upload Documentation to the Notification.....	18
ANNEX:.....	22



# DFS Umoja Reference Guide

## EQUIPMENT ASSIGNMENT (Issue, Handover, Return)

The purpose of this guide is to provide a high-level reference on the Assignment of Equipment using Umoja, as applied to the process in Peacekeeping and Special Political missions.

**Trigger:** Perform this process whenever equipment (single or multiple) is assigned to a Business Partner (BP) or functional location.

Enterprise Roles	
SD.01	Notification User
SD.02	Notification Approver
SD.11	Services Delivery Equipment Master Data Maintainer – Local

T-codes	
IW51	Create Notification
IW52	Change/Approve Notification
LT31	Print Transfer Order
IE02	Enrich Equipment Record

Glossary	
<b>Asset</b>	Fixed assets as defined under UN IPSAS rules. Fixed Asset information is recorded in Umoja in the Fixed Asset Master.
<b>Business Partner</b>	Any party with a Umoja Business Partner number for which an equipment should be assigned whenever in-use.
<b>Equipment</b>	Any serialized/barcoded item as defined by the Umoja Material Master and/or must individually tracked via an Equipment Master Record in Umoja both while in-stock and in-use.
<b>Functional Location</b>	Any Umoja functional location defined and linked to a real estate object (also in Umoja) that an equipment can be assigned to or installed.
<b>UN Custodian</b>	The Services Delivery Section, technical section, or business area in the mission accountable for the Equipment during physical verification.



# DFS Umoja Reference Guide

## KEY STEPS - OVERVIEW

### Step 1 – Create/Approve Notifications.

Equipment assignments must be supported by a Notification in Umoja. Any request (from staff members via iNeed, phone, email, in-person) should either initiate a new Notification or be linked to an existing Notification.

	Request Item(s)	Assign Request	Create Notification	Approve Notification
Tasks	Request items. This can be done through iNeed, phone call, email. This is as per current process. iNeed ticket is created and approved	If iNeed ticket is received, it is sent to the focal point of the appropriate Technical Section	A Notification is created to track the request for items. If a Notification exists, this step can be skipped	Approves Notification. If a Notification exists, this step can be skipped
Roles	No Umoja Role	No Umoja Role	SD.01: SD Notification User SD. 11: SD Equipment Master Data Maintainer Local	SD.02: Services Delivery Notification Approver
Who?	All Staff	Service Desk, Digital Solutions Centre, Technical Section	Focal Point in Technical Section that owns the equipment	Chief (or designate) in the Technical Section that owns the Equipment

### Step 2 – Goods Issue (Only if the equipment is to be issued from inventory).

The Goods Issue process must be initiated separately using a Reservation (green boxes). If the inventory is kept in a Umoja warehouse management, the Goods Issue must be followed by Goods Picking from the Warehouse (orange boxes).



# DFS Umoja Reference Guide

	Request Goods	*Certify Reservation for budget approval	Approve Reservation	Issues Goods	Create Transfer Order	Picks Items
Tasks	Create Reservation to request goods from inventory.	Not Required	Determines if request is valid. Runs report to confirm equipment assigned to Anne (if any).  Review reservation and approve/reject reservation.	Executes Goods Issue in Umoja	[Transfer Requirement automatically generated by Goods Issue].  Review Transfer Requirement and Create Transfer Order in Umoja for Picking instructions.	Retrieves laptop and confirms Transfer Order (TO) in Umoja. Prints TO and the Reference and Signature Sheet. Gives laptop to Anne, gets Anne to sign the Reference and Signature Sheet. Send copy to Anne and to CITS.
Roles	Multiple Roles	FM.07 FM Earmarked Funds Documents Certifier	RD.05: Receive to Distribute Inventory Senior User	RD.04: Receive to Distribute Inventory User	RD.11: Receive to Distribute Warehouse Senior User	RD.10: Receive to Distribute Warehouse User
Who?	Focal Point in Technical Section	N/A	Inventory Senior User for the Storage Location/technical section.	Focal Point in Technical Section	Eve - Warehouse Manager	Frank - Warehouse Staff

\*Only if payment is required

Goods Issue steps are not relevant for Equipment Return (from Business Partner to UN Custodian) or Handover (from one Business Partner to another Business Partner). Go directly to Step 3.

### Step 3 – Assign Equipment and document the Handover.

This creates a physical record of Equipment handed over to the responsible party (new Business Partner or back to the UN Custodian) using a combination of (a) <Reference and Signature Sheet> (**see sample template below**, (b) any other supporting documents e.g. print out of Goods Issue Slip, Transfer Order, Reservation, etc.



# DFS Umoja Reference Guide

**SAMPLE FORM – MISSIONS MAY TAILOR THE FORM BUT MUST INCLUDE MANDATORY FIELDS HIGHLIGHTED YELLOW**

**UNITED NATIONS**  
[Mission Name]



**NATIONS UNIES**  
[Nom de mission]

[Mission Acronym]

## Signature Sheet to be uploaded in Umoja together with Notification for: **Equipment Issue / Handover / Return**

Issue/handover/return Date\*: \_\_\_\_\_ Umoja Notification No\*: \_\_\_\_\_

Umoja Transaction Document: (Goods Issue # / Transfer Order # / Reservation #): \_\_\_\_\_

*This form is used when United Nations Owned equipment is assigned or reassigned to/from an individual. UN Owned Equipment refers to any serialized/barcoded item as defined by Umoja Material Master. By signing this form, the undersigned recipient acknowledges the hand-over and receipt of the UN owned equipment, and assumes all responsibility for the accountability, safe-keeping and proper handling of the equipment, at all times, until they returned to the United Nations. All mandatory fields (indicated by asterisk (\*)) must be filled.*

TYPE OR PRINT CLEARLY:

No	*Umoja Serial No.	(Other) Barcode /Decal/ TechID, No. / Vehicle No.	*Item description/ model/make	*Other Umoja ref: Goods Issue no./Reservation, Transfer Order.
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

\*To be completed by the person handing-over the equipment:

\*To be completed by the person receiving the equipment:

ID no: \_\_\_\_\_  
 BP no.: \_\_\_\_\_  
 BP Name: \_\_\_\_\_  
 Dept/Section: \_\_\_\_\_  
 Unit/Section: \_\_\_\_\_  
 Region: \_\_\_\_\_  
 Loc/building: \_\_\_\_\_ Rm#: \_\_\_\_\_  
 Tel ext #: \_\_\_\_\_ Email: \_\_\_\_\_  
 Signature: \_\_\_\_\_ Date: \_\_\_\_\_

ID no: \_\_\_\_\_  
 BP no.: \_\_\_\_\_  
 BP Name: \_\_\_\_\_  
 Dept/section: \_\_\_\_\_  
 Unit/section: \_\_\_\_\_  
 Region: \_\_\_\_\_  
 Loc/building: \_\_\_\_\_ Rm#: \_\_\_\_\_  
 Tel ext #: \_\_\_\_\_ Email: \_\_\_\_\_  
 Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**IMPORANT NOTE:** Umoja equipment record must be updated by equipment custodian before this form is uploaded against the Umoja Notification.  
 \*Equipment updated by: \_\_\_\_\_ Date: \_\_\_\_\_  
 \*Notification uploaded by: \_\_\_\_\_ Date: \_\_\_\_\_

**IMPORTANT NOTE:** The ORIGINAL SIGNED COPY of this document should be kept by the [warehouse/section] handing over the equipment. ONE COPY to be forwarded to [ASSET MANAGEMENT UNIT] **IMMEDIATELY** after the handover for the equipment record to be updated in Umoja and copy of this document to be uploaded to Umoja. ONE COPY to be forwarded to PCIU after hand-over of the equipment. The person receiving equipment should keep a copy of this document for their own records. EACH PAGE **MUST** BE SIGNED!



# DFS Umoja Reference Guide

## Step 4 – Update Equipment Record and Asset Record\*

The UN Custodian is responsible for ensuring that the Equipment Records (and Asset Record if applicable) are updated with the latest assignment information. Confirmed on <Reference and Signature Sheet>.

	Assign Equipment	Update Equipment Record	Upload Documentation to Notification
Tasks	Assign or Hand Over equipment to requestor. Print copy of the Reference and Signature Sheet for new user to sign.	Updates Equipment Record for Partner Assignment, Functional Location, Maintenance Plant, Cost Center, Auth. Group, Notification number, etc.	Updates Notification and tracking document (if any) with Equipment Number, Uploads scanned Reference and Signature Sheet and supporting documents to Notification.
Roles	No Umoja Role	SD.11: Services Delivery Equipment Master Data Maintainer Local	SD.01: SD Notification User  SD.11 SD Equipment Master Data Maintainer Local
Who?	Focal Point in technical Section owning the equipment and/or Warehouse staff in coordination with Technical Section.	Focal within the Technical Section that owns the Equipment.	Focal Point within the Technical Section that owns the Equipment.

## Step 5 – Upload Documentation to a Notification.

All relevant documentation (from Step 3 and Step 4) should be uploaded against the correct Notification in Umoja using correct attachment attributes and nomenclature to facilitate search and retrieval.

When a Notification is first created, the SD.01 Notification User can upload an MS Excel spreadsheet to keep a list of the documents uploaded and relevant transactions. The MS Excel spreadsheet can be updated directly in Umoja, without any requirement to download and re-upload.

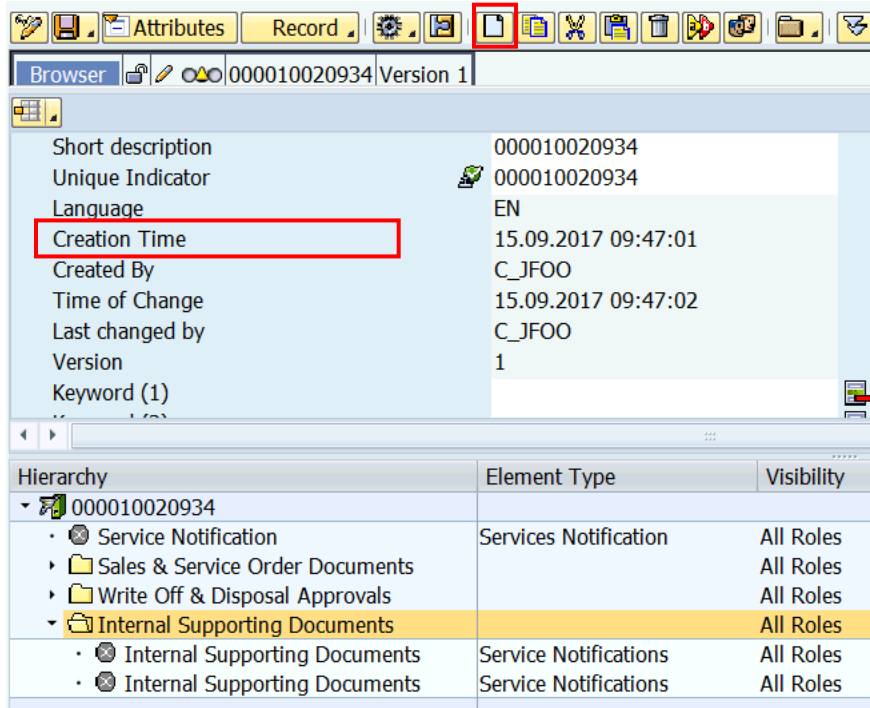
The screenshot displays the Umoja system interface. On the left, a 'Record' view shows details for a notification with ID 000010014323, including its unique indicator, language (EN), creation time, and creator (Dorji Wangmo). Below this is a 'Hierarchy' table:

Hierarchy	Element Type	Visibility	Last Processed	Node ...
000010014323			DWANGMO / 15.09.2017 / ...	
Service Notification	Services Notification	All Roles		8
Sales & Service Order Documents		All Roles		1
Write Off & Disposal Approvals		All Roles		3
Internal Supporting Documents		All Roles		6
EQISS_JDAVID.MLTPL_001	Service Notifications	All Roles	DWANGMO / 15.09.2017 / ...	7

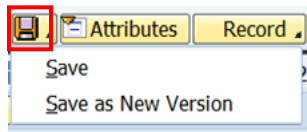
On the right, an Excel spreadsheet is open, showing a table with columns: TransacticName, Item, Date, and Comments. The spreadsheet is currently empty.




# DFS Umoja Reference Guide



2. Once all documents have been uploaded, click on the **Save** icon and choose **Save**.



3. Click on the **Close** icon . (You may have to click this button twice).

4. **Save**  the Notification.






# DFS Umoja Reference Guide

## KEY STEPS - DETAILS

### Step 1 – Create/Approve Notifications

There are several types of Notifications and each type has a unique set of approval rules and list of statuses. Notification Type P1 is used in the equipment Assignment process.

P1 	<b>P1 - Maintenance/Service Request</b> <ul style="list-style-type: none"> <li>Initial Equipment Assignment Process</li> <li>Request for General service request and maintenance request</li> </ul>
PW	PW - Write-off/Disposal/ Impairment Request: <ul style="list-style-type: none"> <li>For writing off property</li> <li>Plant and equipment</li> <li>Disposal by sales and/or trade-off</li> <li>Impairment of fixed asset</li> </ul>
ZA	ZA – Accident/Incident: <ul style="list-style-type: none"> <li>For initiating physical count of inventory and/or equipment</li> </ul>

### When are new Notifications required?

**Each Technical Section\* should create ONE Notification every month.** The Notification is created by SD.01 Notification Users. Once this Notification is approved by the Technical Section’s Chief (or designate with role SD.02 Notification Approver), the Notification number will be referenced in every assignment or transfer of equipment by the Section during that calendar month. The Notification is used as a location for uploading all documentation associated with all such equipment assignments and transfers.

**Note:**

- All requests for equipment and hand-overs will be uploaded against this single Notification.
- All supporting documents (e.g., Reference and Signature forms, Goods Issue Slip, Transfer Order, etc.) will be uploaded to the Notification.
- A tracking spreadsheet should be used to track all the transactions under the same Notification. For creation and upload of tracking spreadsheet, see an example below:

\* This is defined in the system by Plant/Authorization Group as the responsible unit for the Equipment; which mostly should correspond to the “UN Custodian.” For example:

- One Notification for SS10: UNMISS/S00: Safety and Security.
- One Notification for SS10: UNMISS/F00: Facilities Management.



# DFS Umoja Reference Guide

1. Use T-Code IW51
  - Notification type “P1.”
  - A Notification template for “Equipment Assignment” is available: 10022061 under the Reference section.

**Create Service Notification: Initial Screen**

Notification

Notification type

Notification

Reference

Notification

2. In the Notification text, enter a description of the Notification. Since a single Notification will be created for each Technical Section per month, use the following suggested nomenclature for naming Notifications. (Note that a different nomenclature is to be used for attachments).

**EQASSIGN-<Mission>\_<Section>\_<YEAR>\_<MONTH>**

E.g. *EQASSIGN\_MONUSCO\_ENG\_2017\_08*

**Change Service Notification: Maint/Serv Request**

Partner | Organization... | Contract selection

Status

Notification

Notific. Status

3. In the Notification tab, enter:
  - **Description:** A brief description/title to reference request.
  - **Equipment Number:**
    - If only one equipment is requested in the Notification, it should be referenced within the Notification once the serial number to be assigned is known.



# DFS Umoja Reference Guide

- If multiple requests for equipment is in the Notification, leave the field blank, and attach the list of equipment to the Notification.
- **Coding:** select coding “UN00: Assignment.”
- **Long Text:** In the “Description” field enter the details of the request, i.e. Who/What is required. If multiple Equipment Records are included in the Notification, indicate that this request is for multiple items and ensure this is attached to the Notification.
- **Plant/Planner Group:** The Plant code and the technical section that will be planning/processing the request.

**Change Service Notification: Maint/Serv Request**

Notification: 10014562 P1 Assign Laptop to New Staff

Equipm. Status: OSMO RQCR

Reference object: Functional loc., Equipment: 10054380 HP laptop. As per ITS Systems Contract 0

Subject: Coding: UNASSN UN00 Assignment; Description: Assign Laptop to New Staff

12.09.2017 01:54:54 TSEGHA SELETA (TKELETA)  
Request for the issuance and Assignment of Laptop from stock  
User: Priya Matra

Item: Object part, Damage, Text, Cause code, Cause text

Execution: Priority, Req. start, Malfunc. start, Required End, Malfunc. end

Priority	Req. start	Malfunc. start	Required End	Malfunc. end
	12.09.2017 01:50:53	12.09.2017 01:50:56	00:00:00	00:00:00

Main WorkCr: [red box]

Planner group: F00 / WL10 Facilities Managem

4. If the Notification is in the Tasks tab, enter the list of tasks.
- If a Notification template was referenced in the first step, the tasks will be populated.
  - If a Notification template was not referenced, some suggested tasks include:

## Suggested Tasks

- a. Record request in Notification
- b. Check if material is available
- c. Create Reservation
- d. Check current equipment holdings of user
- e. Update Notification with reservation number



# DFS Umoja Reference Guide

- f. Have Reservation Approved
- g. Attach signed User Acceptance Document (Transfer Order)
- h. Send signed copy to user
- i. Update Equipment Record

The screenshot shows the SAP 'Change Service Notification: Maint/Serv Request' interface. The notification number is 10001217 and the description is 'Assignment of Equipment Stock'. The status is 'OSNO OSTS'. Below the header, there are tabs for 'Notification', 'Location data', 'Items', 'Tasks', 'Activities', and 'Sales'. The 'Tasks' tab is active, displaying a table of tasks.

No.	Code gro...	Ta...	Task code text	Task text	T...	Status	User Status	Task processor
1	UNGENRC	001	Generic Task	Request creation/Forward to Approver	TSOS	TSOS		Person respo...
2	UNGENRC	001	Generic Task	Notify Notification	TSOS	TSOS		Person respo...
3	UNGENRC	001	Generic Task	Create Reservation/Log	TSOS	TSOS		Person respo...
4	UNGENRC	001	Generic Task	Receive/Check Material is available	TSOS	TSOS		Person respo...
5	UNGENRC	001	Generic Task	Update Notification w/reservation number	TSOS	TSOS		Person respo...
6	UNGENRC	001	Generic Task	Attach signed User Acceptance Doc	TSOS	TSOS		Person respo...
7	UNGENRC	001	Generic Task	Attached scanned copy to staff member	TSOS	TSOS		Person respo...
8	UNGENRC	001	Generic Task	Update Equipment Record	TSOS	TSOS		Person respo...

## Approve/Release Notifications

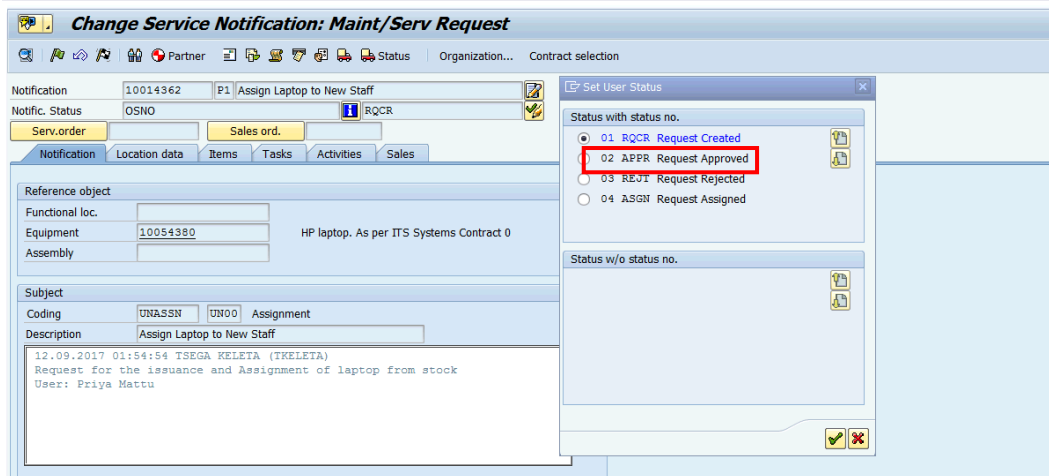
There is no system workflow in Umoja for approving the Notification. It is recommended that the **Notification User (SD.01) sends an email** to the Notification Approver (SD.02) once the Notification is ready for approval.

Alternatively, the Notification Approver can run a **Notification report (T-Code IW58)** to search for and review pending Notifications that require Approval.

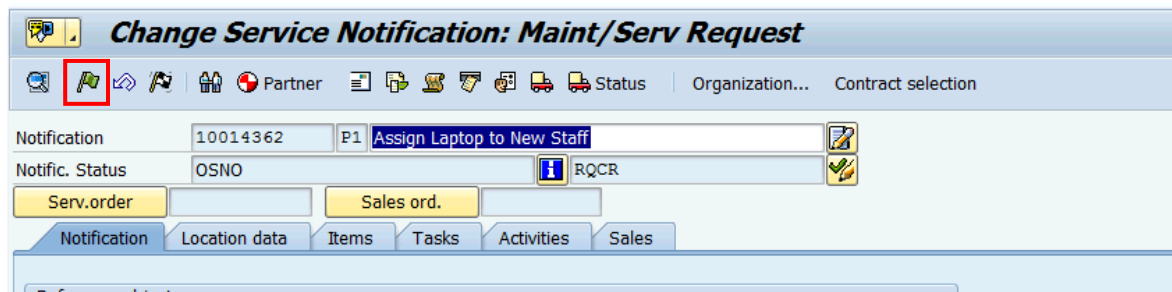
1. Use **IW52** t-code and enter the Notification number.
2. **Notification** tab: Review the details of the request.
  - a. **Location Data** tab: Review the Account Assignment. If an equipment record has been updated in the Notification tab, then the account assignment will be populated from the equipment information. If it is not, then the information for Business Area and Cost Centre data must be populated.
  - b. The Notification Approver **reviews** the Notification. If it is OK, **release** all the tasks and change the status of the Notification to **APPR - Request Approved**. If not, **Reject** the Notification.
  - c. Notification must be Approved and released before Equipment Assignment can begin.



# DFS Umoja Reference Guide



3. Click the “Release Icon” 



## Step 2 – Goods Issue (Only if the equipment is to be issued from inventory).

A reservation should be created and approved, with subsequent goods issue. A warehouse issues the equipment by creating and confirming the Transfer Order. For additional details on this process, please refer to Umoja Job Aids and User Guides on Logistics Execution and Inventory management:

- [How to Create, Certify and Approve Reservations for Inventory](#)
- [Umoja Local Inventory Goods Movement](#)



# DFS Umoja Reference Guide

## Step 3 – Assign Equipment and document the Handover

The purpose of this step is to create the physical record (supporting documentation and signature of the recipient BP) when the Equipment is handed over to the new responsible party (i.e. new Business Partner or back to the UN Custodian).

The physical records should comprise of:

(a) <Reference and Signature Sheet>.

(b) any other supporting documents e.g. print out of Goods Issue Slip, Transfer Order, Reservation, etc.

- **If the Equipment is to be handed over by the Technical Section**, technical section staff do the following:
  - Prints (or reprints) the Goods Issue Slip
  - Prints and fills out a new <Reference and Signature Sheet>
  - Gets the recipient to sign the <Reference and Signature Sheet>
  - Retains/Scan set of documentation
  - Perform Step 4 and Step 5
  - Provide or circulate copies of documentation to BP and PMU as necessary
- **If the Equipment is to be handed over by the Warehouse (after issuance by Technical Section)**, technical section staff do the following:
  - Prints (or reprints) the Goods Issue Slip
  - Prints and fills out a new <Reference and Signature Sheet>
  - Inform the warehouse by providing a scanned copy of the abovementioned Goods Issue Slip and (partially filled) Reference and Signature Sheet
- Staff in the warehouse shall:
  - Receive the information from the technical section and match the Goods Issue with Transfer Requests
  - Turn the Transfer Request to Transfer Order
  - Prints (or reprint) the Transfer Order
  - Prints and obtain signatures on the scanned <Reference and Signature Sheet> received from Technical Section
  - Retains/provide scanned signed copy of all documentation (including Transfer Order) back to UN Custodian (Technical Section) to complete Step 4 and Step 5
  - Provide or circulate copies of documentation to BP as necessary
- Staff in the technical section shall:
  - Prints/update/scan documentation received from Warehouse
  - Perform Step 4 and Step 5
  - Provide or circulate copies of documentation to BP and PMU as necessary



# DFS Umoja Reference Guide

## Step 4 – Update Equipment Record and Asset Record\*

Once the Goods Issue has been processed the following information must be updated in the equipment master:

- **Equipment Status**
  - The status needs to be changed to reflect that the equipment has been assigned to a user.
- **Business Partner**
  - The Person Accountable for the Equipment will be updated to reflect that the equipment has been assigned to a user.
- **Functional Location**
  - Install the equipment to the Functional Location.
  - The Functional Location is a Real-estate object that will denote the place where the equipment is location. It represents a building, floor or room.
- **Inventory Field**
  - Notification Number must be referenced in the equipment record(s), for ease of identification and reporting.

### **Notes:**

If there are multiple equipment records associated with the Notification, reference the [Mass Equipment Update](#) Job Aid.

Check if the equipment assigned or transferred is a Fixed Asset. **If so, it is important that the Asset Accountant is notified so the appropriate steps which are specific to Fixed Asset can be completed.** For further information, please refer to the relevant Job Aid on [Reassignment of Asset Value and Asset Class](#).

### **Equipment Assignment\_Single Equipment Enrichment**

1. Enter T-Code IE02 and enter the Equipment Number. To update the User Status: Select the status “EQAS Equipment Assigned/Operation”



# DFS Umoja Reference Guide

### Change Equipment : General Data

Class overview Measuring points/counters

Equipment: 10027810 Category: **M** UN Owned Serialized

Description: **Computer:Laptop** *Intern.note*

Status: AVLB EQID

Valid From: 29.06.2015 Valid To: 31.12.9999

General Location Organization Structure Warranty SerData P.

#### General data

Class:

Object type: 43211503 Notebook computers

AuthorizGroup:

Weight: 1 KG Size/dimension:

Inventory no.:  Start-up date:

#### Reference data

AcquistnValue: 1,225.00 USD Acquisition date: 29.06.2015

#### Manufacturer data

Manufacturer:  ManufCountry:

Model number:  Constr.yr/mth:  /

ManufPartNo.:

ManufSerialNo.:

### Change Status

Equipment: 10027810 Category: **M** UN Owned Serialized

Description: Computer:Laptop

Status Business processes

#### System status

Stat Text

AVLB Available

#### Status with status no.

No Stat Text

- 1 EQID Equipment Idle
- 2 **EQAS Equipment Assigned/Operat..**
- 3 EQMT Equipment in Maintenance
- 4 EQIT In Transit
- 5 EQNF Equipment Not Found

Status w/o status no.





# DFS Umoja Reference Guide

## 2. To update the Business Partner:

- Go to the “**Partner Assignment**” tab.
- Select the Function “**User Accountable**” and search for the Name of the User that the equipment is being assigned to.
- Select the appropriate person and click on the green check mark.

**Change Equipment : Partner Assignme**

Class overview Measuring points/counters

Equipment: 10027810 Category: M UN Owned Serialized

Description: Computer:Laptop Intern.note

Status: AVLB EQAS

Valid From: 29.06.2015 Valid To: 31.12.9999

Structure Warranty SerData **Partner Assignment** Op. Equipment

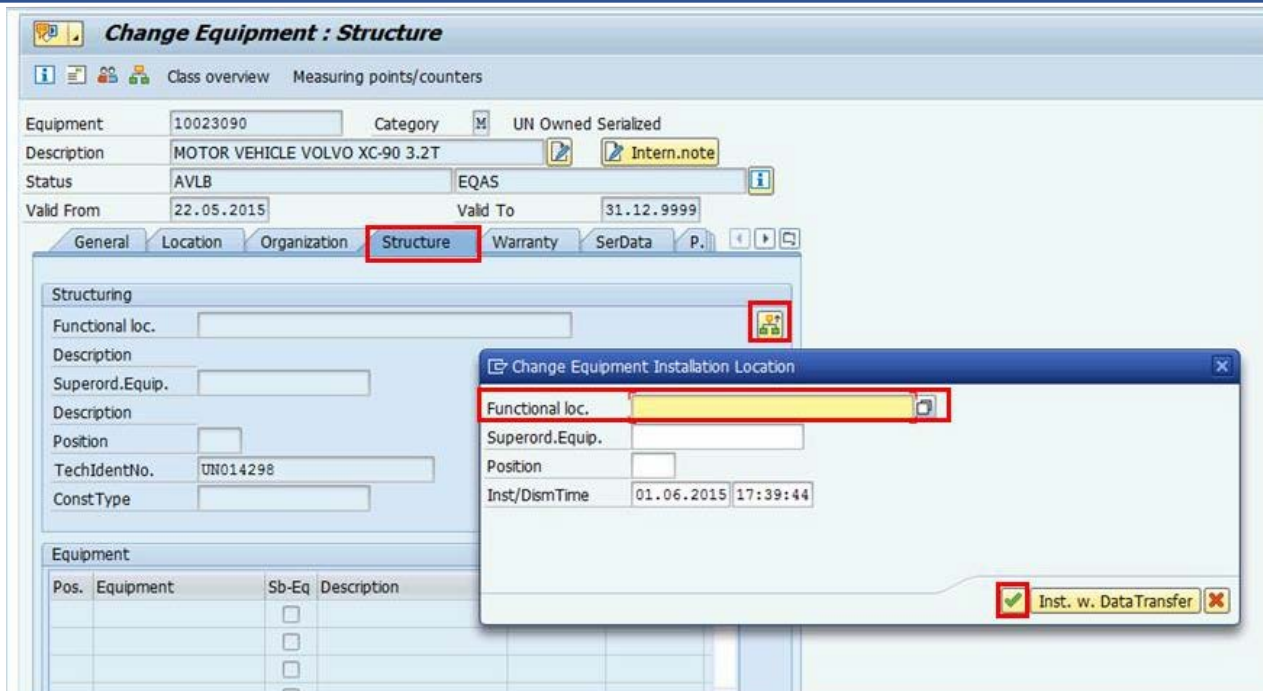
Func	Partner	Name	A Address
Vendor	1110001370	Lenovo, Inc.	Lenovo, Inc., Morrisville, 347661:
<b>User Accountable</b>	<b>20001234567</b>	<b>Paul HOLDEN</b>	<b>Paul HOLDEN, Geneva, , HOLDI</b>

## 3. To install to the functional location:

- Click the **Structure** tab.
- Click the **Change InsLoc** icon to install equipment to a functional location.
- In the **Change Equipment Installation Location** pop-up window, enter the required functional location and click the **Continue** icon.

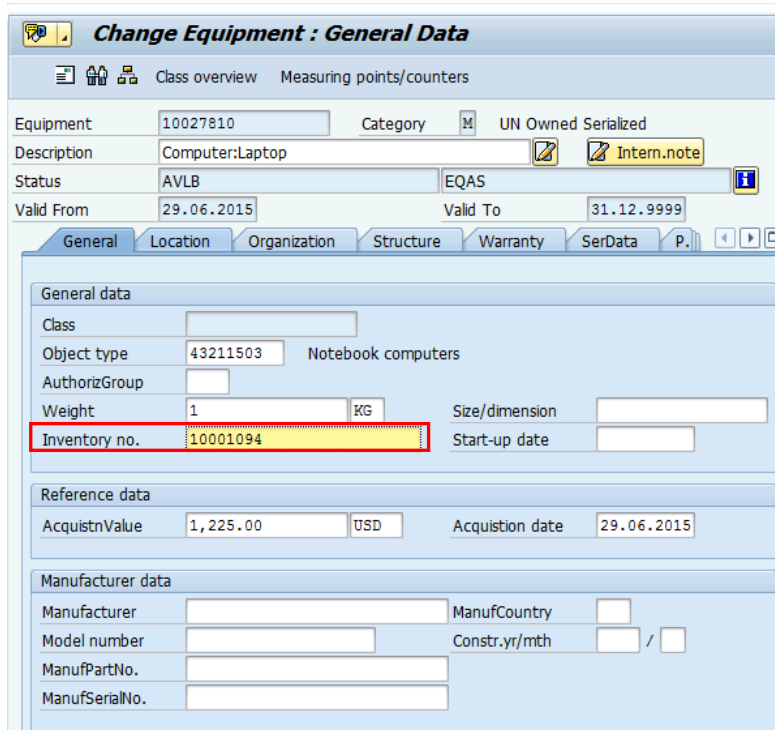


# DFS Umoja Reference Guide



#### 4. Update the Notification Number:

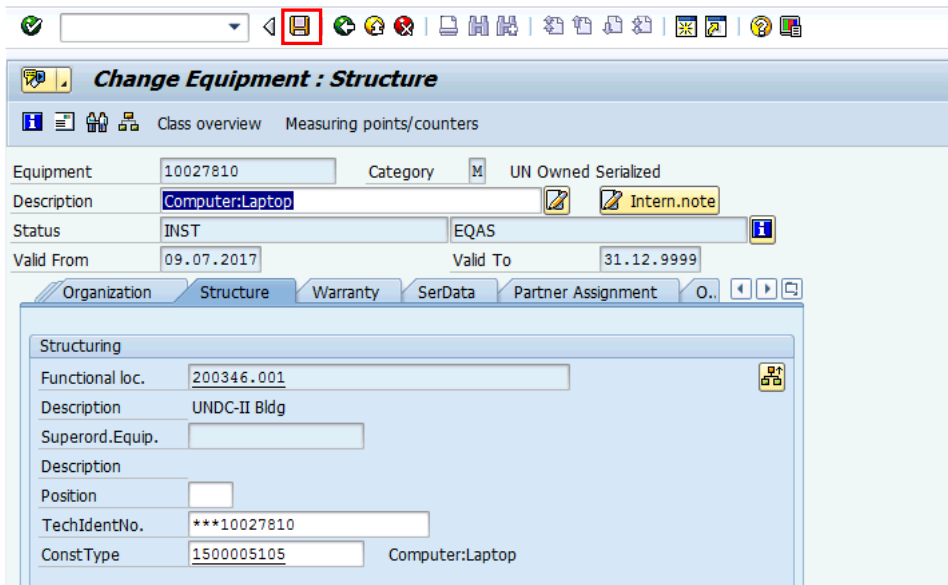
- In the General Tab, enter the Notification number in the “Inventory no.” field.





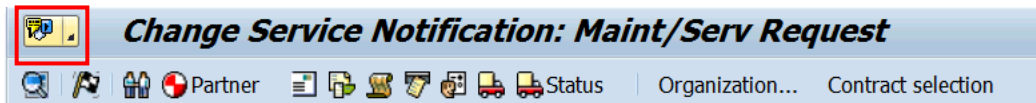
# DFS Umoja Reference Guide

5. Click on the Save icon.

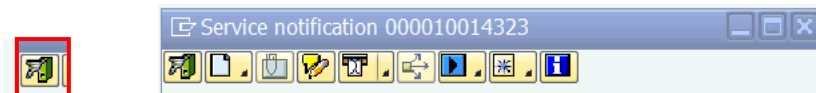



## Step 5 – Upload Documentation to the Notification

1. Enter t-code **IW52** to edit/change the Notification.
2. Enter the Notification number.
3. In the top left corner, click on the Services for Object icon.



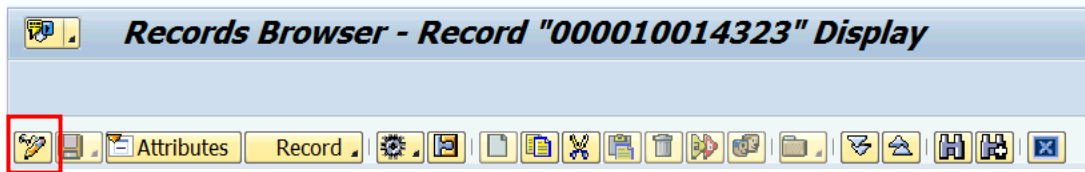
4. Select Records Management Plant Maintenance; however, the system may prompt you to “Choose an Object.”
  - a. If prompted to Choose an Object, double click on **Service Notification** OR select the line for Service Notification and click the checkmark.
  - b. The icon bar may pop-up and click on the icon for Records Management Plant Maintenance.



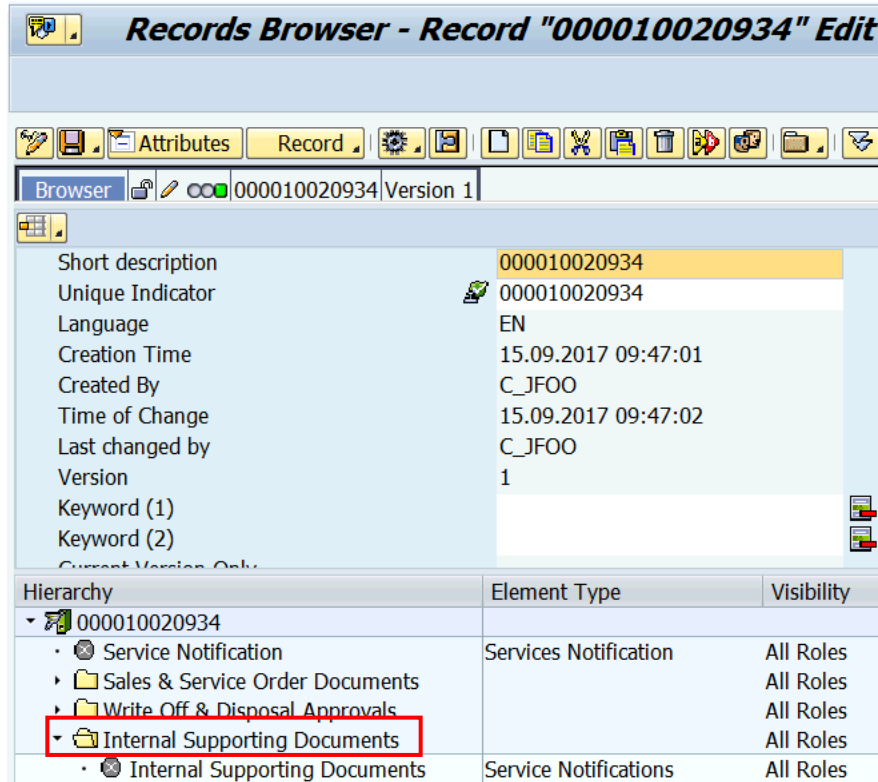
- c. OR a dropdown list may appear, and choose Records Management Plant Maintenance.
5. In the Records Browser, click on the icon for Display/Change. 



# DFS Umoja Reference Guide



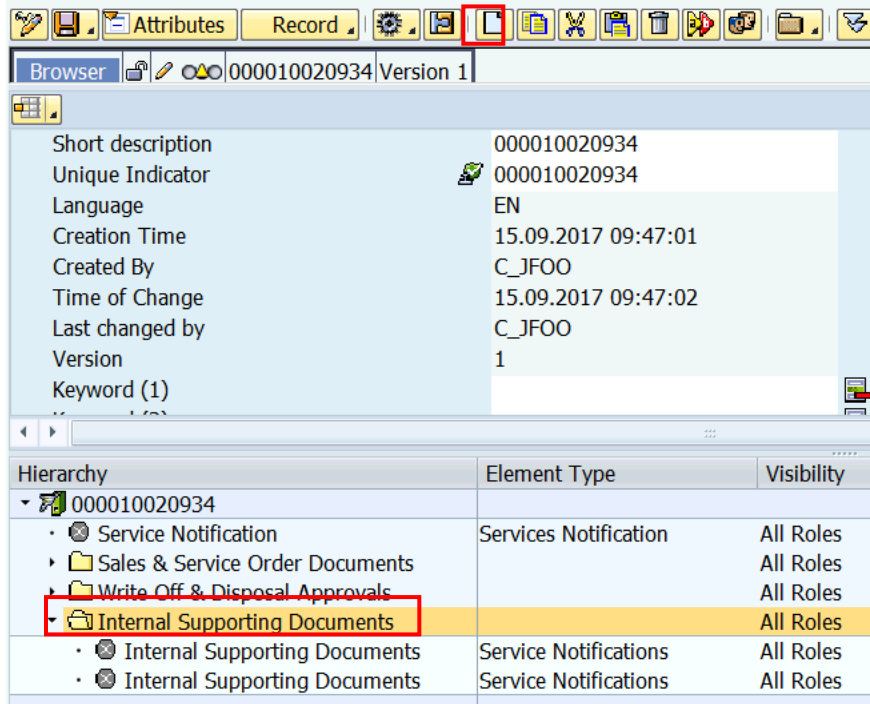
6. Click on the arrow pointing to **Internal Supporting Documents**

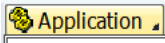


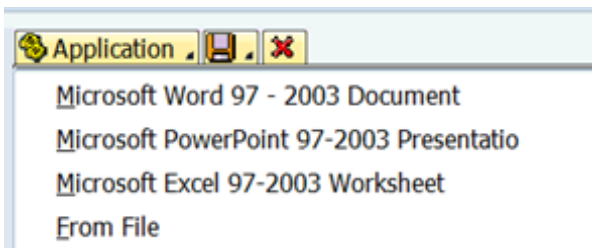
7. Select on the **Internal Supporting Documents** folder and then click the **Create** icon:



# DFS Umoja Reference Guide



8. In the window that appears on the right, select the “**Application**” button , and from the drop-down, choose “**From File**”.



9. In the pop-up window that appears, locate and select PDF file with the signed documentations from Step 3 above.

10. In the Create Attributes window, fill in the following fields:

- a. Short Description
- b. Unique ID
- c. Keyword (1)
- d. Keyword (2)

For the attributes, the following nomenclature must be followed:



# DFS Umoja Reference Guide

(a) **Short Description** - <no. of parent document i.e. Notification No. >

(b) **Unique ID** for the assignment of equipment <Prefix by type of transaction “Issue=I”; “Handover=H”; “Return=R”>\_<Last Name of recipient>\_<Date in YYYYMMDD>

Example:

R\_HOLDEN\_180301

I\_GARCIA\_020217

H\_HAMEED\_310318

(c) **Keyword** - Keyword (1) is used to identify the custodian responsible for equipment: <Service delivery section>\_<location>\_<mission>.

Example:

GITTS\_GOMA\_MONUSCO

SUP\_GAO\_UNMISS

ENG\_NYALA\_UNAMID

Keyword 2 is Optional. The mission may designate the use and nomenclature for Keyword 2.

*Note: Only the **Short Description** is displayed in the Hierarchy window. The attributes will not be visible until after the item is selected and clicking the icon to display the attributes. Search functionality in Umoja is being developed to enable search by the various attributes.*

Attribute	Value
Short description	10010842
Unique ID	R_Houlden_180318
Creation Time	08.03.2018 22:33:13
Created By	PHOLDEN Paul Holden
Time of Change	
Last changed by	
Version	1
Expiry Date	
Keyword (1)	ENG_GOMA_MONUSCO
Keyword (2)	Generator
Language	EN English
Current Version Only	
ID of Original Document	
Version of Original Document	
Check-Out Path on Desktop (1)	
Author (in MS Document)	
As Copy of	
Document Template	



# DFS Umoja Reference Guide

## ANNEX:

Role No.	Enterprise Role Name	Transaction
FA.16	FINANCIAL_ACCOUNTING: ASSET_ACCOUNTING_SENIOR_USER	ZMMMB21
RD.02	RECEIVE_TO_DISTRIBUTE: PROPERTY_CONTROL_USER	ZMMMB21
RD.04	RECEIVE_TO_DISTRIBUTE: INVENTORY_USER	ZMMMB21
RD.05	RECEIVE_TO_DISTRIBUTE: INVENTORY_SENIOR_USER	ZMMMB21
RD.06	RECEIVE_TO_DISTRIBUTE: LOGISTICS_USER	ZMMMB21
RD.07	RECEIVE_TO_DISTRIBUTE: RECEIVING_USER	ZMMMB21
RD.08	RECEIVE_TO_DISTRIBUTE: VIRTUAL_DIRECT_RECEIVING_USER	ZMMMB21
RD.09	RECEIVE_TO_DISTRIBUTE: INSPECTION_USER	ZMMMB21
SA.01	SOURCE_TO_ACQUIRE: REQUISITIONER	ZMMMB21
SA.01b	SOURCE_TO_ACQUIRE: REQUISITIONER_CIC	ZMMMB21
SA.02	SOURCE_TO_ACQUIRE: REQUISITIONER_DIRECT PROCUREMENT	ZMMMB21
SA.07	SOURCE_TO_ACQUIRE: APPROVER	ZMMMB21
SA.08	SOURCE_TO_ACQUIRE: LOW_VALUE_ACQUISITIONER	ZMMMB21
SA.16	SOURCE_TO_ACQUIRE: APPROVER-PROCUREMENT	ZMMMB21
SD.03	SERVICES_DELIVERY: PLANNER	ZMMMB21
SD.04	SERVICES_DELIVERY: ORDER_RELEASER	ZMMMB21
SD.05	SERVICE: SERVICES_DELIVERY_USER	ZMMMB21
SD.06	SERVICE: SERVICES_DELIVERY_APPROVER	ZMMMB21
SD.07	SERVICE: SERVICES_DELIVERY_MASTER_DATA_MAINTAINER	ZMMMB21
SD.10	SERVICES_DELIVERY: EQUIPMENT_MASTER_DATA_MAINTAINER	ZMMMB21
SD.11	SERVICES_DELIVERY: EQUIPMENT_MASTER_DATA_MAINTAINER_LOCAL	ZMMMB21
SD.16	SERVICES_DELIVERY: PREVENTATIVE_MAINTENANCE_PLANNER	ZMMMB21