Overview

Incomplete iNeed tickets are increasingly being received by Tier 3 Umoja support in relation to Financial Accounting (FA), Funds Management (FM), and Grants Management (GM).

To improve effectiveness and response time, there is an urgent need to ensure iNeed tickets received by these Umoja groups have been properly reviewed at lower Tiers, and that the appropriate information is attached to all work orders (WO).

All users are reminded to refer to the online Training materials and Job Aids published on the Umoja website (umoja.un.org) or discuss with their local Umoja process experts before raising iNeed requests for support.

Please find below the minimum documentation expected on an iNeed request related to Umoja modules FA, FM, GM. The requirements below cover both system issues/defects (IM) or request for system changes (RFS). If tickets arrive at Tier 3 without these minimum requirements, the Tier 3 agent will return the WO to the next Tier down (i.e. to Tier 2b or Tier 2a) for follow up.

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Minimum information needed in an iNeed for a Work Order defect (IM)

| #	Item	Note	FI (including Fixed Assets)	FM	GM
1	A complete description of the problem encountered. If Grants related a complete description of the business scenario (see below *)	1	Yes	Yes	Yes
2	T-code used		Yes	Yes	Yes
3	User ID/IDs (do not send passwords)		Yes	Yes	Yes
4	Document numbers affected		Yes	Yes	Yes
5	Grant affected		Yes	NA	Yes
6	Error Message Summary (screen shot)	2	Yes	Yes	Yes
7	Full Error Message (screenshot)	3	Yes	Yes	Yes
8	Budget Period		No	Yes	Yes
9	Posting Period		Yes	Yes	Yes
10	Print screen of FMAVCR02	4	No	Yes	Yes
11	Corrections already done by user		Yes	Yes	Yes
12	GM specific requirements				
13	Analysis of Implementing Partner- Purchase Order (IP-PO)	5	NA	NA	Yes

NOTES:

1. **DESCRIPTION:**

   - Explain whether the document is a normal business case or an exception. List all documents in the document chain.

     o   For example if you have an issue with an invoice, go back to the first document in the chain (usually the PO) and explain the sequence of events. E.g. an advance was paid, the SES done, the SES was revoked and re-entered, and finally an invoice was entered with an unplanned charge, or for a partial amount, etc.

   - Articulating the sequence of actions will result in a better understanding of the issue at the user level. The support team should not have to research the sequence of action for the document chain.

   - If the issue is grants related, include a description of the business scenario and the stage the user is having issues with. This is helpful to the GM Team when analyzing issues that have occurred in different ECC modules.
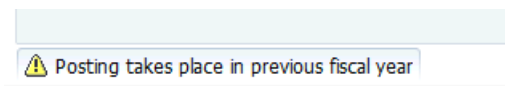
2. **ERROR MESSAGE SUMMARY:**

   - Send a print screen of the error message summary.

   Example of an error message

   ❗ "FI: Postings" is not allowed (WBS AA-000016.01.01)
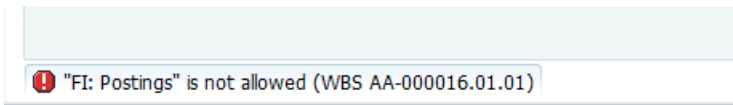
   Note the following icon ⚠ indicates a warning message only. Users are reminded to review the message and decide whether they should proceed. The message itself is not an indication that you are prevented from proceeding.

   Example of a warning message:

   ⚠ Posting takes place in previous fiscal year

3. FULL ERROR MESSAGE:

- Send a print screen of the error message summary (similar to the error message summary), In order to get the full message, double click on the error message summary displayed and a pop-up screen with the performance assistant will be displayed.

Example of a full error message
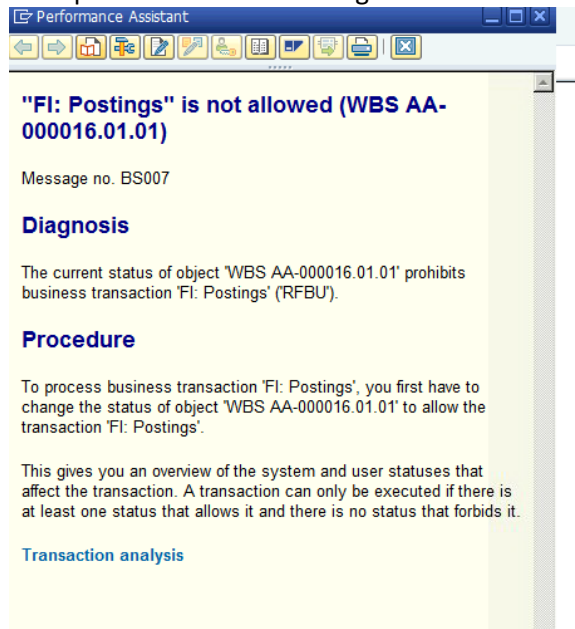
4. BUDGET AVAILABILITY ISSUES:
- Please use t-code FMAVCR02 if the issue relates to budget availability. Ensure you attach a print screen of the affected budget at the time the error is encountered.

5. ANALYSIS OF IMPLEMENTING PARTNER- PURCHASE ORDER (IP-PO)
- For budget issues relating to Implementing Partners' POs, attach an analysis of the PO budget balance by line item. Include the following details by service line item:
  - PO approved amount
  - Down payment (different columns for each DP)
  - Down payment clearing
  - Service entry sheet
  - PO balance

See sample format on the following page

Sample format of information required

IM-1-4406666xxx
PO2700000XXX

	PO Amount	DP1	DP Clearing 1	DP Bal	DP2	DP Clearing 2	DP Bal	DP3	SES1	PO Balance
		3301081843	3500087165		3301612560	3500150517		3302076370	5000266457	=Bxx-Exx-Hxx-Ixx-Jxx
									8200265700	
		06.08.2015	18.02.2016		29.02.2016	19.08.2016		22.08.2016	18.02.2016	
IP-Staff and Other Personnel Costs	347,880.00	139,152.00	-139,152.00	0.00	104,364.00	-33,067.41	71,296.59	71,296.59	172,219.41	33,067.41
IP-Supplies,Commodities,Materials	271,015.16	108,406.06	-108,406.06	0.00	81,304.55	-71,476.93	9,827.62	9,827.62	179,882.99	71,476.93
IP-Contractual Serv	60,645.00	24,258.00	-16,810.48	7,447.52	18,193.50	0.00	18,193.50	18,193.50	16,810.48	0.00
IP-Operating and Other Direct Costs	68,630.00	27,452.00	-18,285.05	9,166.95	20,589.00	0.00	20,589.00	20,589.00	18,285.05	0.00
IP-Indirect Support Costs	52,371.91	20,948.77	-20,948.77	0.00	15,711.57	-6,155.09	9,556.48	9,556.48	27,103.86	6,155.09
Total	800,542.07	320,216.83	-303,602.36	16,614.47	240,162.62	-110,699.43	129,463.19	129,463.19	414,301.79	110,699.43

Minimum iNeed information required for a Work Order Request For Service (RFS)

#	Item	FI (including Fixed Assets)	FM	GM
1	A complete description of the change requested, including relevant t-codes and enterprise user roles affected.	Yes	Yes	Yes
2	Attach the approval of the Head of Accounts Division, Senior Budget Officer PPDB/PFD, or Chief of Trust Fund/TC Section (AD), for the Change Requested.	Yes	Yes	Yes
3	A description of the implication of the change.	Yes	Yes	Yes
4	A description of other alternatives explored and why the change is preferred.	Yes	Yes	Yes