



**Orientation:
Material Master Creation Request
Focal Points**



Agenda

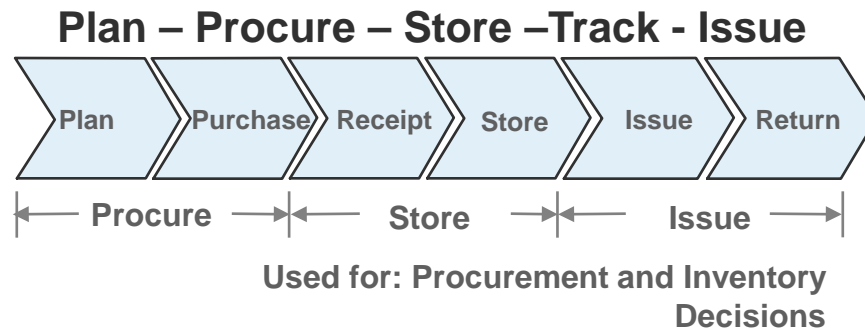
- **Objectives**
- **Importance of Master Data and Material Master**
- **Scope of Ramp Up Focal Point Role & Orientation**
- **What is a Material Description?**
- **Searching for Material Descriptions**
- **What if I do not find what I am looking for?**
- **Proper completion of a Material Master request**

Objective

- **Be able to effectively provide appropriate information into the master data request process for creation of new Material Master records by:**
 - ▶ Understanding basic concepts of master data and Material Master
 - ▶ Understanding how to effectively search for a Material Number and validate results
 - ▶ Understand when to request a new Material Master record and what knowledge and information is required
- **Recognise that requesting a new Material Master requires understanding and communication of requirements and reasons.**

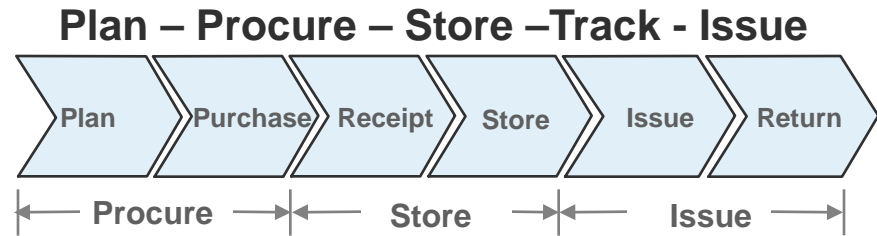
Master Data and Material Master

- **Master Data: represents business objects which are agreed on and shared across the enterprise**
 - ▶ Used over time and across functional areas
- **Material Master: the master data record of material-specific data**
 - ▶ Used as an information source for a variety of planning, purchasing and inventory management transactions/activities



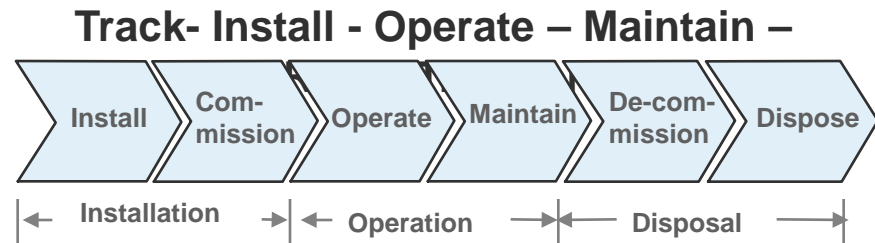
Additional Master Data about Physical Items

Material Master



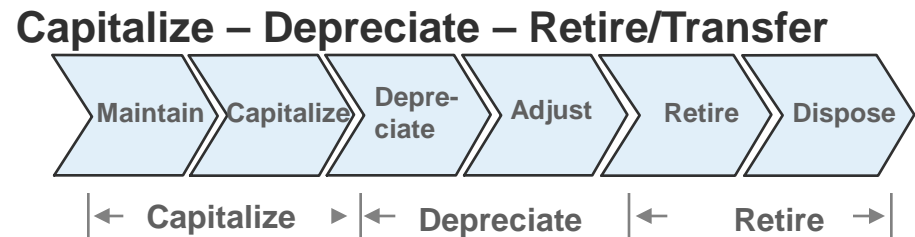
Used for: Procurement and Inventory Decisions

Equipment Master



Used for: Operational/Logistics Decisions and Tracking

Fixed Asset Master



Used for: IPSAS Compliance – Financial Statement Disclosure and Impairment decisions

Item Life Cycle and Material Master



Values of Standardisation and Consistency

- **Reduce inventory carrying cost**
 - ▶ Fewer total items
 - ▶ Faster inventory turns
- **Reduce waste**
 - ▶ Less write-off for obsolescence
- **Reduce time spent on day-to-day requisitions**
- **Improved institutional knowledge of consistent solutions**
- **Improve negotiating power and discounts at procurement**

Role of Systems Contracts in Consistency

- **Business requisitioners understand operational requirements and define standardised solutions to meet operational needs.**
- **Each standardised solution has a unique Material Description and Number.**
- **Systems contracts are defined as a source for standardised solutions.**
 - ▶ Contract line items correspond with standardised solutions and include the Material Number.
 - ▶ Exact vendor item to fulfill the need represented by the Material Number is fixed for the duration of the contract.

Scope

- **Material Master records are complex.**
 - ▶ Large volume and wide variety of data about each material
- **Requests for new Material Master records focus specifically on the Material Description.**
 - ▶ To be valid for creation of a new Material Master record, each request must represent an unambiguous item in the context of the entire Material Master catalogue.
- **Focal Points ensure validity of requests and consolidate requests for submission.**
 - ▶ Guidance on the specific Ramp Up process for Focal Points will be conveyed in a separately with other Ramp Up support processes.

Material Master Record Data Includes

- **Material Number (unique identifier)**
- **Material Description**
- **Basic Data (ex: UoM, Material Group, Material Type)**
- **Additional Parameters, for example**
 - ▶ Physical parameters like weight and volume
 - ▶ Logistics and warehousing parameters like special handling requirements for inventory
 - ▶ Accounting parameters
 - ▶ Sales and distribution parameters

What is a Material Description?

- **40 characters of text that uniquely identifies an item by the nature of the item**
 - ▶ Unique identification of an item indicates a form, fit for purpose, and function equivalent to meet UN requirements
 - ▶ Sufficient specification to differentiate between similar items required for use by the Organisation
 - ▶ Based on UN requirements, and not vendor-specific features*
- **To ensure a specific item maps uniquely to a single Material Master, Material Descriptions must be unambiguous.**
 - ▶ Descriptions conform to strict formatting rules.

Understanding Umoja Material Descriptions

- Examples of Material Descriptions:
- 1.) Pen,Ballpoint,Blk
 - 2.) Pen,Ballpoint,Blu
 - 3.) Pen,Ballpoint,Red
 - 4.) Pen,FeltTip,Blk
 - 5.) Pen,FeltTip,Blu
 - 6.) Pen,Rollerball,Blk
 - 7.) Pen,Rollerball,Blu
 - 8.) Pen,Rollerball,Red
 - 9.) Truck:Dump,Petrol,RHD,4x4
 - 10.)Truck:Dump,Diesel,LHD,4x2



Fig. 1



Unique and Unambiguous

- ▶ Unique: being the only one of its kind; unlike anything else
- ▶ Unambiguous: not open to more than one interpretation
- ▶ Any specific item should only be properly mapped to one Material Master record.
 - ▶ Pen,Blue
 - ▶ Pen,Ballpoint

▶ Unique descriptions: 

▶ Representing unique items: 

▶ Unambiguous: 



Material Master as Unambiguous Catalogue

- **Each Material Master record is part of the overall whole of the Material Master catalogue.**
- **For Material Descriptions to remain unambiguous, each new Material Description must be considered in the context of the whole existing catalogue of Material Descriptions.**

Two Levels of Material Descriptions

Uncharacterised

- **Noun Only**
- **Appropriate for**
 - ▶ Ad hoc, one-time, consumption purchases
 - ▶ Items where a single definition has been standardised for use; no characteristics required to define variation
 - ▶ Generally supported by global systems contract
- **All Material Master Descriptions should be either uncharacterised or fully characterised.**

Characterised

- **Noun + Characteristics**
- **Appropriate for**
 - ▶ Planned procurement
 - ▶ Items held in stock
 - ▶ Variations of similar items defined to meet different requirements
 - ▶ Represented by different individual contract line items on systems contracts

Special Description for Spare Parts

➤ What qualifies for spare part description model?

Proprietary items used for:

- ▶ maintenance
- ▶ repair
- ▶ expansion

of an already owned piece of equipment or system where the manufacturer of that piece of equipment or system owns the specification for the part required to work properly for the maintenance, repair or expansion.

Spare Parts Description Model

Examples of Material Descriptions: 1.) Spare:Toner,HP,CE402YC
2.) Spare:TPT,Toyota,16470-30040

Noun

Spare:Toner
Spare:TPT

Characteristic 1:
Manufacturer Name

HP
Toyota

Characteristic 2:
Manufacturer P/N

CE402YC
16470-30040

- **Manufacturer Name is the name of the manufacturer of the piece of equipment or system we have purchased.**
- **Manufacturer P/N is the part number that the equipment manufacturer uses to identifies the item specified by the Material Description.**
- **The Material Description is a source of specification, not a source of supply.**
- **An Excel template is available specifically for requesting spare part Material Master records.**

Material Master Resources on iSeek

Time zone and weather

New York Sun 27 Aug 18:45 22 °C / 71 °F	Santiago Sun 27 Aug 19:45 13 °C / 55 °F	Geneva Mon 28 Aug 00:45 23 °C / 73 °F	Vienna Mon 28 Aug 00:45 21 °C / 69 °F	Beirut Mon 28 Aug 01:45 26 °C / 78 °F	Nairobi Mon 28 Aug 01:45 15 °C / 59 °F	Addis Ababa Mon 28 Aug 01:45 12 °C / 53 °F	Bangkok Mon 28 Aug 05:45 25 °C / 77 °F
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United Nations Retweeted

UN News
@UN_News_Centre

#UN chief @antonio.guterres shocked to

Toolkit

Quicklinks

- Quicklinks Addis Ababa
- Quicklinks Bangkok
- Quicklinks Beirut
- Quicklinks Geneva
- Quicklinks Nairobi
- Quicklinks New York
- Quicklinks Santiago
- Quicklinks Vienna

Alphabetical Index

Performing enterprise tasks

Umoja

- Umoja Self-Service log-in
- Umoja on iSeek**
- Umoja Production Systems log-in

Enterprise apps

- Forms
- Inspira log-in
- Unite Connections log-in
- Unite Docs log-in

ICT resources

- ICT FAQs
- Need Help? Unite Self Service
- ICT Policies
- ICT Standards
- Information Security
- Unite Identity Support
- Unite Service Desk
- OICT Services
- Unite Connections log-in
- Unite Docs log-in

Life as a staff member

Careers and jobs

- Inspira log-in
- Career Guidance
- Career Options
- Examinations
- Generic Job Profiles
- Job Openings
- New to the UN
- Pre-Retirement Programme
- Staff Movements

Learning and productivity

- Business Card Generator log
- Flexible Working Arrangeme
- Learning Opportunities
- Manager's Toolkit

Health and well-being

- Health Insurance
- Medical Alerts
- Medical Services Worldwide
- Staff Counsellors Office

Umoja

DM map | Log in to Umoja | Need a role? | Umoja FAQs | Contact us

Secretariat > Department of Management (DM) > Umoja

Welcome to Umoja

Umoja is the administrati
by integrating and stream
for the entire Secretariat.
Notes and Field Support i

Umoja Quicklinks

- Job Aids
- Umoja FAQ's
- Umoja Training
- Need a role?
- Master data maintenance
- Material Master Reference**
- Master Data Coding Block

Umoja news

- Get ready for the next Umoja Blackout
- Are you ready for the next Umoja Blackout?
- GDP Go-Live - Save the date
- Second Umoja Blackout and new GDP information
- Umoja News and Updates | Umoja Blackout in effect this weekend
- Colleagues in the Field get ready for Umoja
- Umoja: When you need to know

Searching Tips

➤ Search at a high level, using few key words and wild cards.

- ▶ If your search does not yield any results, make the search less specific.
- ▶ If your initial search is too specific, you may miss a matching result because of a small difference.
- ▶ If your search yields too many results, analyse the results and add filters to narrow further.

➤ Verify the match resulting from your search.

- ▶ Confirm the Product Category is appropriate for your requirement.
- ▶ Confirm that sibling Materials in the Product Category are of a similar nature to your requirement.

What if I do not find what I am looking for?

- **Did I put appropriate effort into searching?**
- **Have I consulted with a colleague for collaborative effort?**
- **Did I find something similar?**
- **Do I really need this one to be different?**
- **Is it a spare part?**

Indications for a new Material Master Record

- **I am preparing a solicitation for a contract for new requirements or for a category of items that has not yet been standardised?**
 - ▶ Engage a Specification Process Expert (SPE) in the planning phases of creating the solution for your requirements. With the SPE engaged in planning, the MDM form/process is a signature/documentation formality.
- **I have a variation of an existing type of requirement that is not accurately represented by existing Material Descriptions.**

Finding the Master Data Forms (iSeek)

The screenshot shows the Umoja portal interface. At the top, there is a 'Time zone and weather' section with weather icons and temperatures for various cities. Below this is a navigation bar with 'DM map', 'Log in to Umoja', 'Need a role?', 'Umoja FAQs', and 'Contact us'. The main content area is titled 'Umoja' and includes a 'Performing enterprise tasks' section with links for 'Umoja Self-Service log-in', 'Umoja on iSeek', and 'Umoja Production Systems log-in'. There is also an 'Enterprise apps' section with links for 'Forms', 'Inspira log-in', 'Unite Connections log-in', and 'Unite Docs log-in'. A 'Quicklinks' sidebar is visible on the left. A central banner features the Umoja logo and the slogan 'be the change'.

Welcome to Umoja
Umoja is the administrat
by integrating and strear
for the entire Secretariat
Notes and Field Support

MASTER DATA MAINTENANCE FORMS

Category	Form Title	Form Type	How to submit
Business Partners	Business_Partner_Commercial_Companies	InfoPath	Send via email to umoja-mdm@un.org
Business Partners	Business_Partner_Third_Party_Non-Commercial	InfoPath	Send via email to umoja-mdm@un.org
Business Partners	Business_Partner_Individual_Person	InfoPath	Send via email to umoja-mdm@un.org
Business Partners	Business_Partner_Individual_Person_Bulk_Upload	InfoPath	Send via email to umoja-mdm@un.org
Finance	Asset_Master	InfoPath	Send via email to umoja-mdm@un.org
Finance	Cost_Center replaced by: Cost_Funds_Center	InfoPath	Send via email to umoja-mdm@un.org
Finance	Functional_Area	InfoPath	Send via email to umoja-mdm@un.org
Finance	Fund_Master	InfoPath	Send via email to umoja-mdm@un.org
Finance	Funds_Center replaced by: Cost_Funds_Center	InfoPath	Send via email to umoja-mdm@un.org
Finance	General_Ledger_Account	InfoPath	Send via email to umoja-mdm@un.org
Finance	Grant	InfoPath	Send via email to umoja-mdm@un.org
Material/Services	Material_Master	InfoPath	Send via email to umoja-mdm@un.org
Finance	Profit_Center	InfoPath	Send via email to umoja-mdm@un.org
Material/Services	Service_Master	InfoPath	Send via email to umoja-mdm@un.org

Finding Templates for Mass Requests (iSeek)

The screenshot shows the Umoja website interface. At the top, there is a 'Time zone and weather' section with weather icons and temperatures for various locations like New York, Santiago, Geneva, Vienna, Beirut, Nairobi, Addis Ababa, and Bangkok. Below this is a navigation bar with links for 'DM map', 'Log in to Umoja', 'Need a role?', 'Umoja FAQs', and 'Contact us'. The main content area displays 'Welcome to Umoja' and 'Material Master Reference' with a sub-heading 'Material Master and Service Master Search'. A table below lists file descriptions and links for search tools and cheat sheets.

Material Master Reference

Material Master and Service Master Search

File Description	File link
Material and Service Master Record Search Tool	searchtoolformmsmfor_users_20170811_0.xlsm
Material and Service Master Search Cheat Sheet	spare_parts_template_v12.xlsx

User Guidance for Request of Material Master Maintenance

File Description	File Link
Completing the form for Umoja Data Maintenance Request	materials_master_data_maintenance_request_cheat_sheet_v1.0.pdf
Guide to submitting Material Master Request	submitting_the_form_material_master_request.pdf

Templates

File Description	File Link
Spare Parts Mass Template	spare_parts_template_v12.xlsx
Material Master Mass Template	materialsmassrequest_template_v4.xlsx

Material Master Resources

File Description	File Link
Mapping Nouns with Characteristic Values	

Forms and Templates

- Templates allow for multiple requests to be submitted with a single form.
- All submissions to umoja-mdm@un.org must include a form.

Material Master

Please fill out this form, save it locally, and send it as an attachment from your email account to umoja-mdm@un.org

required
 optional
 not applicable

Basic Data			
Action	<input checked="" type="radio"/> Create	<input type="radio"/> Update	<input type="radio"/> Block
Material Number			
Material Description			
Reference Material		Reference Price (Curr: \$USD)	
Example Make			
Example Model			
Reference Notes			
Suggested Material Type	▼		
Suggested Material Group	▼		
Base Unit Of Measure	▼		
Procurement Status	▼		
Purchasing Unit	▼		
Conversion Factor			

Plant Specific Information			
Plant	▼		
Storage Location			
Max. Storage Period		Min. Remaining Shelf Life	
Period Ind. For Sled		Total Shelf Life	

Requestor Information	
Requested For (Business Area)	▼ <small>*Please enter the Business Area this Data Maintenance is requested for - independently of the Business Area the request is being submitted by.</small>
Requested By	
Org Unit	
Date	28-Aug-17
Reason	
Source Data	<input type="checkbox"/> On Form <input type="checkbox"/> Attached
Located In/At	

A	B	C	D	E	F
	Noun	Manufacturer Eqpm	Spare Part Number		Related Product Category
Example:	Spare:TPT	Toyota	08886-01805		25170000
	▼				#N/A
					#N/A
					#N/A
					#N/A
					#N/A
					#N/A

K	L	M	N	O	P	Q	T	V	Y
List all the items that need to be created, including the Material that has been used to complete the required fields in the 'Umoja Data Maintenance Request Material Master' info-path form. Send the xls file together with the Infopath Form to umoja-mdm.org .									
Reference Material	Reference Material Description	Reference Price	New Material Description (40)	Material Type	Material Group	Material Group Description	UoM	Reference Notes	Operational Reason
						#N/A			
						#N/A			
						#N/A			

Basic Data

Basic Data			
Action	<input checked="" type="radio"/> Create	<input type="radio"/> Update	<input type="radio"/> Block
Material Number	<input type="text"/>	<input type="text"/>	
Material Description	<input type="text"/>		
Reference Material	<input type="text"/>	Reference Price (Curr: \$USD)	<input type="text"/>
Example Make	<input type="text"/>	<input type="text"/>	
Example Model	<input type="text"/>	<input type="text"/>	
Reference Notes	<input type="text"/>		
Suggested Material Type	<input type="text"/>	<input type="text"/>	<input type="text"/>
Suggested Material Group	<input type="text"/>		
Base Unit Of Measure	<input type="text"/>	<input type="text"/>	<input type="text"/>

- Mix of fields to allow requestor to provide information available.
- Requestor must understand the item for which the new Material Master record is requested.
- Requestor must communicate information so the Material Master team understands the item.

Reference Material and Reference Notes

Basic Data			
Action	<input checked="" type="radio"/> Create	<input type="radio"/> Update	<input type="radio"/> Block
Material Number			
Material Description			
Reference Material		Reference Price (Curr: \$USD)	
Example Make			
Example Model			
Reference Notes			
Suggested Material Type			
Suggested Material Group			
Base Unit Of Measure			

- Reference Material provides the context of the existing Material Master catalogue where the new request fits.
- Reference Notes describe how the new requirement fit with the existing Material Master catalogue, but why the new item requirement is not met by existing Material Master records in the catalogue.

Explaining the New Requirement

Basic Data			
Action	<input checked="" type="radio"/> Create	<input type="radio"/> Update	<input type="radio"/> Block
Material Number			
Material Description			
Reference Material		Reference Price (Curr: \$USD)	
Example Make			
Example Model			
Reference Notes			
Suggested Material Type			
Suggested Material Group			
Base Unit Of Measure			

- **Material Description is a proposal for the new Material Description.**
 - ▶ If your request is very similar to the Reference Material, start with the Reference Material Description to write your Material Description.
 - ▶ Provide as much information here as is appropriate to describe your new item requirement.
- **Example Make/Model help to understand your requirements by providing a commercial reference as an example item.**

Reference Price

Basic Data			
Action	<input checked="" type="radio"/> Create	<input type="radio"/> Update	<input type="radio"/> Block
Material Number			
Material Description			
Reference Material		Reference Price (Curr: \$USD)	
Example Make			
Example Model			
Reference Notes			
Suggested Material Type			
Suggested Material Group			
Base Unit Of Measure			

- Used to define finance and property management settings associated with every item purchased using the defined Material Number.
- Requestor must provide conversion to USD.

Requestor Information

Requestor Information	
Requested For (Business Area)	<input type="text"/> <input type="button" value="v"/> *Please enter the Business Area this Data Maintenance is requested for - independently of the Business Area the request is being submitted by.
Requested By	<input type="text"/>
Org Unit	<input type="text"/>
Date	28-Aug-17 <input type="button" value="Calendar"/>
Reason	<input type="text"/>
Source Data	<input type="checkbox"/> On Form <input type="checkbox"/> Attached
Located In/At	<input type="text"/>

- Knowing who you are allows us to contact you and place your context in the whole of the Organisation.
- Understanding your use assists with decisions on setting Material Master parameters.
- Referencing supporting information ensures better overall knowledge.

Why, Oh Why?

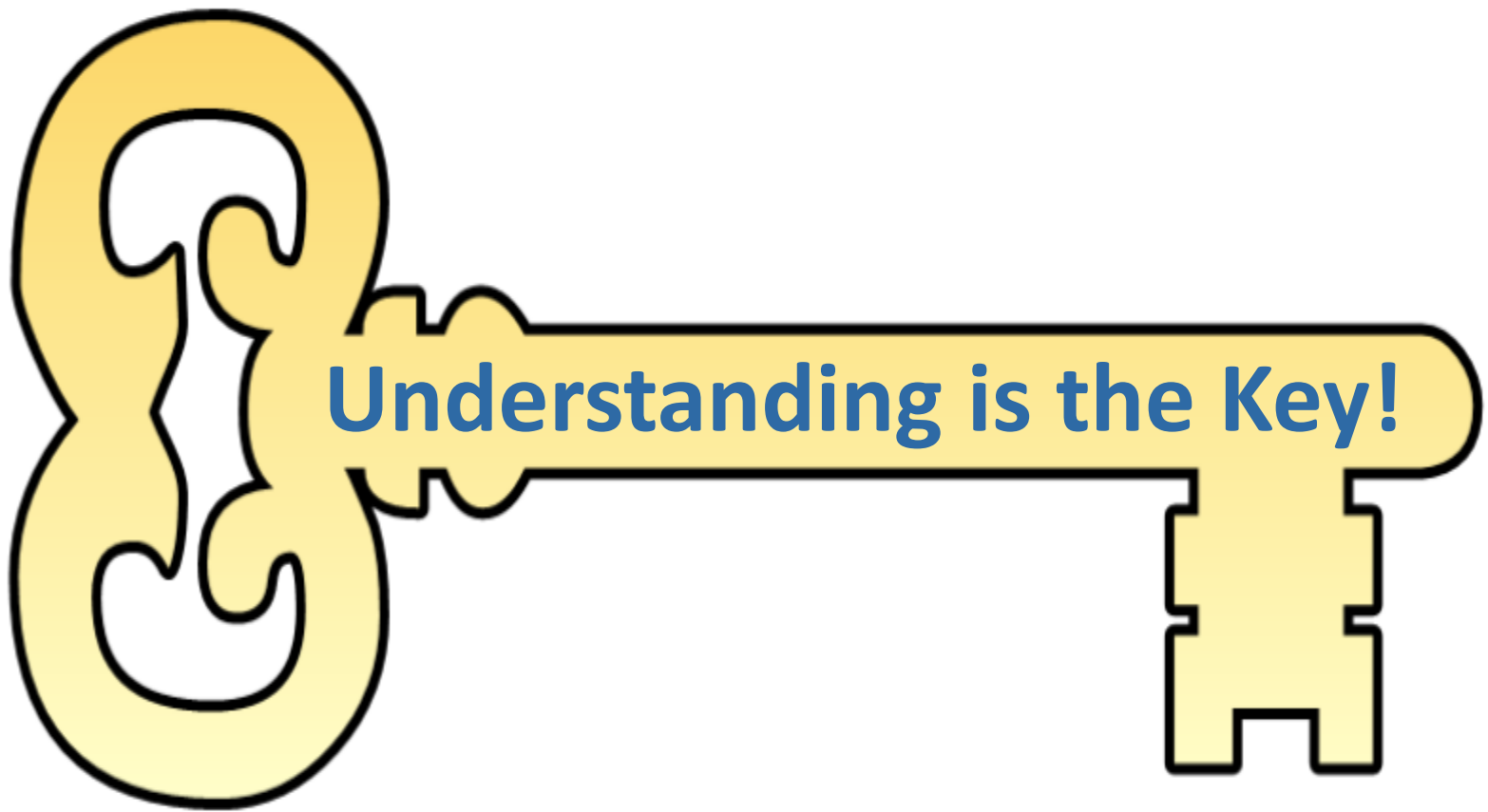
Requestor Information	
Requested For (Business Area)	<input type="text"/> <input type="button" value="v"/> *Please enter the Business Area this Data Maintenance is requested for - independently of the Business Area the request is being submitted by.
Requested By	<input type="text"/>
Org Unit	<input type="text"/>
Date	28-Aug-17 <input type="button" value="calendar"/>
Reason	<input type="text"/>
Source Data	<input type="checkbox"/> On Form <input type="checkbox"/> Attached
Located In/At	<input type="text"/>

- **Critical with Reference Notes to confirm need for new planned item in Material Master catalogue**
- **Include information about:**
 - ▶ Expected volume and frequency of requirements
 - ▶ Different variations of the type of item needed
 - ▶ Known requirements for inventory to meet emergency requirements

What More Can I Say?

Requestor Information	
Requested For (Business Area)	<input type="text"/> <input type="button" value="v"/> <small>*Please enter the Business Area this Data Maintenance is requested for - independently of the Business Area the request is being submitted by.</small>
Requested By	<input type="text"/>
Org Unit	<input type="text"/>
Date	28-Aug-17 <input type="button" value="calendar"/>
Reason	<input type="text"/>
Source Data	<input type="checkbox"/> On Form <input type="checkbox"/> Attached
Located In/At	<input type="text"/>

- **Include information not on the form by checking “Attached”.**
 - ▶ Mass Request Template
 - ▶ Spare Parts Template
 - ▶ Drawings
 - ▶ Example item URL
- **Include filename or URL for supplemental information in the Located In/At field.**



Understanding is the Key!

Thank you!

