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
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: 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**

- Plan – Procure – Store – Track - Issue
- Used for: Procurement and Inventory Decisions

**Equipment Master**

- Track- Install - Operate – Maintain –
- Used for: Operational/Logistics Decisions and Tracking

**Fixed Asset Master**

- Capitalize – Depreciate – Retire/Transfer
- Used for: IPSAS Compliance – Financial Statement Disclosure and Impairment decisions
Item Life Cycle and Material Master

*Equipment Master record includes a field for the Material Number used to purchase the item.
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
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.
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.

*Open solicitation requirements prohibit use of vendor-specific information to define Materials.
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: ✗
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
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.
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 identify 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
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?
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)

Welcome to Umoja
Umoja is the administrator by integrating and stream for the entire Secretariat Notes and Field Support

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Finding Templates for Mass Requests (iSeek)
Templates allow for multiple requests to be submitted with a single form.

All submissions to umoja-mdm@un.org must include a form.
- 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 provides the context of the existing Material Master catalogue where the new request fits.
- Reference Notes describe how the new requirement fits with the existing Material Master catalogue, but why the new item requirement is not met by existing Material Master records in the catalogue.
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.
Used to define finance and property management settings associated with every item purchased using the defined Material Number.

Requestor must provide conversion to USD.
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.
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
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!