WebEx Session 1 – Distance Learning
SUR Module

Umoja Coordination Service (UCS)
TRAINING TEAM
### Training Overview

#### Kick Off VTC

<table>
<thead>
<tr>
<th>Subject</th>
<th>Introduction and scope of the training</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>10 Dec 2018</td>
</tr>
<tr>
<td>Time</td>
<td>8h30 to 9h30 (NY time)</td>
</tr>
<tr>
<td>VTC</td>
<td>Room DC1-0821 - 8th floor</td>
</tr>
<tr>
<td>Topics</td>
<td>• Introduction</td>
</tr>
<tr>
<td></td>
<td>• How to logon to WebEx</td>
</tr>
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</table>

#### WebEx Session 1

<table>
<thead>
<tr>
<th>Subject</th>
<th>UCM Overview and Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>11 Dec 2018</td>
</tr>
<tr>
<td>Time</td>
<td>8h30 to 10h – training session</td>
</tr>
<tr>
<td></td>
<td>10h to 11h – support session</td>
</tr>
<tr>
<td>Link</td>
<td>Session 1 WebEx Link</td>
</tr>
<tr>
<td>Topics</td>
<td>• UCM Overview and processes</td>
</tr>
<tr>
<td></td>
<td>• Navigation</td>
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</tbody>
</table>

#### WebEx Session 2

<table>
<thead>
<tr>
<th>Subject</th>
<th>Creation of Standard Annex Template</th>
</tr>
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<tbody>
<tr>
<td>Date</td>
<td>12 Dec 2018</td>
</tr>
<tr>
<td>Time</td>
<td>8h30 to 10h – training session</td>
</tr>
<tr>
<td></td>
<td>10h to 11h – support session</td>
</tr>
<tr>
<td>Link</td>
<td>Session 2 WebEx Link</td>
</tr>
<tr>
<td>Topics</td>
<td>• Creating SAT</td>
</tr>
<tr>
<td></td>
<td>• Creating SUR from template</td>
</tr>
</tbody>
</table>

#### WebEx Session 3

<table>
<thead>
<tr>
<th>Subject</th>
<th>Creation of SUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>13 Dec 2018</td>
</tr>
<tr>
<td>Time</td>
<td>8h30 to 10h – training session</td>
</tr>
<tr>
<td></td>
<td>10h to 11h – support session</td>
</tr>
<tr>
<td>Link</td>
<td>Session 3 WebEx Link</td>
</tr>
<tr>
<td>Topics</td>
<td>• Creating SUR without template</td>
</tr>
<tr>
<td></td>
<td>• Reporting in UCM</td>
</tr>
</tbody>
</table>
Training Overview - session 1

- UCM Overview
- UCM Functionality
- SUR Overview
- UCM and SUR Navigation
- Demo
- Exercises
- 1 h support session
UCM Overview
Background

High-Level Planning Process (Post-Mandate)

Challenges:
- Implementation of end-to-end process needed solutioning
- Lack of integration between systems
- Limited centralized data
- Manual entry of data and re-entry → time consuming

1. SUR - Statement of Unit Requirement
2. MOU – Memorandum of Understanding
3. TSR – Troop Strength Report
4. VR – Verification Report
• Process efficiencies and enhanced control mechanisms
• Process reengineering, standardization, and simplification
• Harmonization of data used across the organization for greater consistency and accuracy in analysis and
• Standardization of processes for less confusion, subjectivity, and ambiguity
UCM end-to-end process

1. SUR – Statement of Unit Requirement
2. SAT – Standard Annex Templates
3. MOU – Memorandum of Understanding
4. VR – Verification Report
5. TSR – Troop Strength Report
6. SAG – Senior Advisor Group
7. PO – Purchase Order
8. SES – Service Entry Sheet
UCM Functionality
eCOE Enhancement to Verification Reports

• Replacement of free-text heavy data capture, in exchange for structured, pre-defined and mandatory fields

• For example
  • mandatory to and from date fields for equipment that is used in-lieu of equipment stated in an MOU, inclusive of data related to other units receiving self-sustainment,
  • pre-defined values to capture the reasons for which equipment may be non-functional or absent
  • Structure capture of equipment used in-lieu of absent or unserviceable equipment, self sustainment acceptability periods, self sustainment supported/supporting unit data

• eCOE will be merged into UCM
Introduction of Standard Annex Templates

- Standard Annexes Templates (SAT) will be mission and T/PCC agnostic, and can be used to:
  - Act as a baseline for planning activities
  - Enable greater standardization in the creation of SURs
  - Ensure planners do not have to create an SUR from scratch

- The first set of SATs will be based on previously approved RDL SURs
Annexes for SAT, SUR and MOU

Annex A – Personnel
• Appendix – Soldier and Police kit

Annex B – Major Equipment
• Appendix 1 – Special Cases Equipment
• Appendix 2 – List of third-party-owned equipment

Annex C – Self-Sustainment
• Appendix 1 – SS services: distribution of responsibilities
• Appendix 2 - List of items provided by troop contributor under self-sustainment subcategories “welfare” and “Internet access”

Additional Annexes:
D. Principles of verification and performance standards for major equipment provided under a wet lease or dry lease arrangement
E. Principles of verification and performance standards for minor equipment and consumables provided under self-sustainment
F. Principles of verification and performance standards for medical support
G. Statement of unit requirement
H. Definitions
I. Guidelines (aide-mémoire) for troop-contributing countries
J. We are United Nations peacekeeping personnel
K. Environmental policy for United Nations field missions
The creation of standard units, planned units, and deployable units will be more consistent

<table>
<thead>
<tr>
<th>Unit naming classification &amp; standardization</th>
<th>Standard Annex Templates</th>
<th>Statement of Unit Requirements</th>
<th>Memorandum of Understandings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit Category (Police or Military)</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Unit Type (Enabling or Combat)</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Branch (Infantry or Engineering)</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Strength (Brigade or Team)</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Unit Specialization</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Remarks</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Mission</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>T/PCC</td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

By phase of unit creation
## Unit Naming and Classification Structure for Planned Military Units

<table>
<thead>
<tr>
<th>Unit Category</th>
<th>Unit Type</th>
<th>Branch</th>
<th>Strength</th>
<th>Unit Specialization</th>
<th>Remarks (free text)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Military</td>
<td>Combat</td>
<td>Infantry</td>
<td>Brigade</td>
<td>None</td>
<td>ex: Sector North</td>
</tr>
<tr>
<td></td>
<td>Enabling</td>
<td>Cavalry</td>
<td>Battalion</td>
<td>Attack helicopters</td>
<td>ex: Composite</td>
</tr>
<tr>
<td></td>
<td>Reconnaissance</td>
<td>Company</td>
<td>Medium Utility Helicopters</td>
<td></td>
<td>ex: Rapid Deployment</td>
</tr>
<tr>
<td></td>
<td>Intelligence</td>
<td>Battery</td>
<td>Heavy Utility Helicopters</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Artillery</td>
<td>Platoon</td>
<td>Light Utility Helicopters</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Engineering</td>
<td>Section</td>
<td>Airlift</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Aviation</td>
<td>Team</td>
<td>UAS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transport</td>
<td>Unit</td>
<td>Unit</td>
<td>Quick Reaction Force</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support</td>
<td>Hospital - AMET</td>
<td>Composite</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hospital - Level 1</td>
<td>Mechanized</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Military Police</td>
<td>Hospital - Level 2</td>
<td>Reserve</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maritime</td>
<td>Hospital - Level 3</td>
<td>Support</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Riverine</td>
<td>Hospital - Level 2+</td>
<td>Guard Unit</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical</td>
<td>Hospital - Level 1+</td>
<td>Force Protection</td>
<td></td>
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<td></td>
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<tr>
<td>Special Forces</td>
<td>Battalion (+)</td>
<td>Close Protection</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Head Quarters Support</td>
<td>Battalion (-)</td>
<td>Demining</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training</td>
<td>Company (+)</td>
<td>EOD</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Logistics</td>
<td>Company (-)</td>
<td>Vertical Construction</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Escort and Traffic Control</td>
<td></td>
<td>Horizontal Construction</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CIMIC</td>
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<td>Multi-Role</td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Combat Engineering</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td>Airfield</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td>Electronic Warfare</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Petroleum</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Unit Naming and Classification Structure for Planned Police Units

<table>
<thead>
<tr>
<th>Unit Category</th>
<th>Unit Type</th>
<th>Branch</th>
<th>Strength</th>
<th>Unit Specialization</th>
<th>Remarks (free text)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Police</td>
<td>Security</td>
<td>Policing</td>
<td>Formed Police Unit</td>
<td>None</td>
<td>free text box</td>
</tr>
<tr>
<td>Specialized</td>
<td>Aviation</td>
<td>Formed Police Company</td>
<td>Canine Handling</td>
<td>ex: Sector North</td>
<td></td>
</tr>
<tr>
<td>Law Enforcement</td>
<td>Medical</td>
<td>Formed Police Section</td>
<td>Close Protection</td>
<td>ex: Composite</td>
<td></td>
</tr>
<tr>
<td>Enabling</td>
<td>Maritime</td>
<td>Formed Police Team</td>
<td>Crime Analysis</td>
<td>ex: Rapid Deployment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Riverine</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Transport</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reserve</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Medium Utility Helicopter</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Light Utility Helicopter</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Heavy Utility Helicopter</td>
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<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>Aero-medical Evacuation (AMET)</td>
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<tr>
<td></td>
<td>FPU + Canine Handling</td>
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<tr>
<td></td>
<td>FPU + Close Protection</td>
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</tr>
<tr>
<td></td>
<td>FPU + Crime Analysis</td>
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<td></td>
</tr>
<tr>
<td></td>
<td>FPU + Forensics</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>FPU + Investigations</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>FPU + SWAT</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>FPU + Guard</td>
<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>FPU + Riverine</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>FPU + AMET</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td></td>
<td>Surveillance Observation</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>Specialized Police + Forensics Kit</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
SUR Module - Overview
SUR end-to-end Process

1. SUR Template Creation
   - Created by Business Admin Role
     - Military Planning Section in OMA
     - Strategic Policy & Development Section in Police Division
   - Objectives:
     - To develop an easy way for system users to create SUR documents, through the creation of reusable templates.
     - To leverage available master data in selecting major equipment, unit types and self-sustainment categories.
     - To standardize the format and structure of SURs.

2. SUR Draft Initiation
   - Created & Edited by Business Admin AND Business Standard User Role
     - Military Planning Section in OMA
     - Strategic Policy & Development Section in Police Division
   - Objectives:
     - To create a draft copy of the SUR document in the system.
     - To guide the user in identifying all the necessary components required for an SUR document to be complete.
     - To capture all the required data, through document validation, by disallowing users from submitting documents which do not contain all the necessary data.

3. SUR Approval
   - Objectives:
     - To obtain approval of the SUR draft, in accordance to COE policies.
     - To retain a copy of the scanned document after signature.
     - To record the date of signature of the physical copy of the SUR.
     - To form a basis for the creation of MOUs with T/PCCs for the specific Mission and Unit Types.
   - Roles:
     - Military Adviser (MILAD)
     - Police Commissioner
1. SAT – Standard Annex Templates
2. Using Template from the system but updated outside system
3. Annex D – for Military Units
SAT exists or not?

- Create SUR header & Select Type
- Create Annex A Header
- Create Annex B & C

Select SUR Main Body Template
- Create/Update Annex A (Unit Org)
- Create/Update Annex D + Update text Annex A&B
- Create Additional Annexes if any

Generate entire SUR Doc for preview
- Approve SUR

Decision point: NO
- Select Annex Template & Copy Doc
- Update Header details
- Update Annex B & C

Decision point: YES
- Military or Police
- ME quantity
- SS Categories
- Update outside system
- outside system
- outside system
- outside system

Created and edited by Business Admin User AND Standard User roles
SUR specificities

- SUR to be changed if mandate changes, composition or spirit of all the units of the same type in the same mission changes
- No amendments but creation of new versions
- Notification process
- Outside the system:
  - Full body SUR and annexes other B and C, and all appendices (i.e., Soldier's Kit)
  - Confidential elements mentioned in the SUR
  - The signature attach the final version & update status manually in the system
In UCM:

- Creation of SUR for Rapid Deployment Level (RDL) of the Peacekeeping Capability Readiness System (PCRS)
- “Mission Name” will be noted as **UNPCRS** instead of Special Political Mission (SPM) or Peacekeeping (PK)
UCM Navigation
UCM Navigation – Agenda

• How to login

• Troubleshooting the login

• Understanding your screen (Screen icons, Application-level Menu, etc.)

• Main Layout features:
  • Queries
  • Advanced Queries
  • Display columns
  • Exporting your results

• SUR screen and Navigation (List view / Form view & Audit Trail)
• Exercises
• Official Documentation
UCM Navigation – Log into UCM

1. Type in your browser: https://crmuatraps.un.org

2. Type your UNITE ID: i.e: JSMITH

3. Type your Password: XXXXXX

4. You might be asked a security question

5. You will land in the UCM landing page (HOME)
• Tick in the box in case that you want to avoid the security question in the future
• NOTE: You will have to do it for every browser (Explorer; Mozilla; Chrome..) and each computer you log in.
1. Type in your browser: https://crmuatraps.un.org
2. Type your UNITE ID: i.e: JSMITH
3. Type your Password: XXXXXX
4. You might be asked a security question
5. An error message will appear
6. **OPTION 1:** Click on the HOME icon
7. You will land in the UCM landing page (HOME)
8. You are good to go!
1. Type in your browser: https://crmuatraps.un.org
2. Type your UNITE ID: i.e: JSMITH
3. Type your Password: XXXXXX
4. You might be asked a security question
5. An error message will appear
6. OPTION 2: Click on Back bottom
7. An error page will appear

**Session Warning Message**

You have initiated a Siebel session while another Siebel session is currently active. Please choose the option that applies to you.

- You already have a Siebel session with unsaved data running in another browser window. To save data from a second session go to the already open session and either save and exit or continue to use that data.
- You do not have unsaved data in your other session and wish to close it and launch a new session. Click here
- You have closed your previous Siebel browser instance using the Close instead of the Logoff feature and wish to open a new Siebel session. Click here

8. You will have to close your browser (Explorer, Chrome, Mozilla, ..)
9. Open your browser and start from the beginning again
UCM Navigation – Components

Helps you to navigate and manipulate data specific to UCM. Each menu option lets you perform a task in the application.

Information in the UCM is organized into screens. You access a screen by clicking the appropriate screen icon, such as SURs, MoUs or System Documents. The active screen icon appears in underlined in RED.

If the screen icon you want to use is not visible, you may be able to click on the Site Map. From there you will be able to select which icon you want to appear in your Header. (Icon visible for the current session)
In case you want to customize the number and type of icons in the screen:

1. Click on the Application-Level Menu > Tools > **User Preferences**

2. Click on **Tab Layout**, you will see all icons available; in case you want them to appear you will have to untick the box “Hide”.

3. In order to arrange the position of the icons in the header you change the number in the column “Order”.

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![Image of UCM Navigation Components (II)](image-url)
In case you want to query records in UCM:

1. Click on Query in any list of records (i.e: SAT list / SUR List,..)

2. You will able to query any list of records by the different columns in the list.

   a. You can select from the drop-down list
   b. You can look up for a particular element using the wildcard (*).

**Tip:** if querying by status, to only use status and not sub-status.
You will able to further query with more options by clicking on “Query” and then “Query Assistant”. In the new window you will be able to further query your results using different fields at the same time. i.e: MINUSCA, MINUSMA and MONUSCO

a. You can click on Go in order to preview the results
b. Save your query if you want it to have predefined for further searches in the future.

c. The name of your query will appear in the top right corner of your screen
Opens a pop-up window that allows you to select what columns are to be displayed in the specific list view, along with the order in which they are shown.

**Available columns** are the ones Present in the list of records

**Selected columns** are the ones you want to be shown in the list of records
Exports the data from UCM. You can choose to export data based on the following criteria:

- The single row you have selected or all rows in the current list view.
- Only those columns currently visible or all columns for the records.
- You also have the option of choosing the file type and field delimiter.
- Maximum 2000 records can be exported.
- File defaulted is .csv (tab delimited text file)

- Once open, change the file extension to Excel (.xls)
SUR Navigation - Views

1. LIST VIEW

2. FORM VIEW

- Mandatory fields

---

**LIST VIEW**

- Unit Name: Forced Police Unit
- Company: DFO SUR-LNSD-Maritime
- Unit Type: Maritime
- Status: On Board
- Effective Date: 02/11/2016
- Version Number: 1

---

**FORM VIEW**

- Created by: Pedro PONTE
- Unit Location: UNCT
- Unit Structure: 122
- Confidential Notes: None

---

**Mandatory fields**
SUR Navigation – Form and Annexes

**FORM VIEW**

- **Document Number**: DPO-SUR-UNFIL-Cavaliy/Company/Reserve-1
- **Created by**: Pedro PONTE
- **Unit Location**: 
- **Unit Category**: Military
- **Unit Type**: Enabling
- **Branch**: Cavalry
- **Unit Structure**: 100
- **Unit Size**: Company
- **Unit Specialization**: Reserve
- **Unit Remarks**: None
- **Confidential Sections Remarks**: None

**Annex VIEW**

- **Mission Name**: UNFIL
- **Unit Strength**: Remarks
- **Remarks**: None
### SUR Navigation - Annexes & Attachments

#### Annex B Header

**Annex B Header**

<table>
<thead>
<tr>
<th>Menu</th>
<th>New</th>
<th>Delete</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Mission Name</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNIFIL</td>
<td></td>
</tr>
</tbody>
</table>

#### Annex B Line Items

**Annex B Line Items**

<table>
<thead>
<tr>
<th>Menu</th>
<th>New</th>
<th>Delete</th>
</tr>
</thead>
</table>

**Description**

- APC-TRACKED AMBULANCE RESCUE
- APC TRACKED COMMAND POST
- UPS SATELLITE STATION
- CRYPTO FAX
- PROTECTIVE EQUIPMENT FOR STAFF AN...
- FUEL/WATER BLADDER - 7,500 GL
- GEAR FOR TACTICAL RAPPELLING (SPECI.

#### Annex C Header

**Annex C Header**

<table>
<thead>
<tr>
<th>Menu</th>
<th>New</th>
<th>Delete</th>
<th>Query</th>
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#### Annex C Line Items

**Annex C Line Items**

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<th>Query</th>
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**Category**

- COMMUNICATION
- OFFICE
- ELECTRICAL
- MINOR ENGINEERING

**Sub Category**

- HF
- TELEPHONE
- VHF/FM
- GENERAL

**Services Provider**

- CC
- UN
- VHF

**Applicable S cerevisiae**

- Remarks

#### Attachments

**Attachments**

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[Diagram of SUR Navigation - Annexes & Attachments]
SUR Navigation – Audit Trail

- Log of changes and modifications of the main fields of SUR
- Tracking feature in UCM which identifies who, what and when the changes were applied
Exercises

Exercise 1:
Questions on the UCM processes – link:
https://efm.dfs.un.org/EFM/se/6C6639C029FCEBB1

Exercise 2:
Scenario on the Navigation – see documents and detailed instructions sent by email

Instructions:
• 1h support session after the WebEx for the exercises
• Send the answer by today COB in order to receive feedback – umojadfstraining@un.org