WebEx Session 3 – Distance Learning
SUR Module

Umoja Coordination Service (UCS)
TRAINING TEAM
Overview of session 3

- Review of session 2
- SUR from scratch
- Review draft SUR
- Reporting for SUR
- Demo
- Exercise
- 1h support session
Review WebEx2

- Creation of SAT
- Creation of SUR from SAT
- Outcome of Day 2 exercises
Creation of SUR without SAT
SUR without SAT

**Process**

1. **SUR Template Creation**
   - Created by Business Admin Role
     - Military Planning Section in OMA
     - Strategic Policy & Development Section in Police Division

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**
   - **Roles**
     - Military Adviser (MILAD)
     - Police Commissioner
   - **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**

- Created by Business Admin Role
  - Military Planning Section in OMA
  - Strategic Policy & Development Section in Police Division

- Created & Edited by Business Admin AND Business Standard User 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.
Create SUR without SAT

1. No existing SAT
2. Create SUR header
3. Specify Category, Unit, Type, Branch & Strength
4. Create Annex A Header
5. Create Annex B & C
6. Select SUR Main Body Template
7. Create/Update Annex A (Unit Org)
9. Create Additional Annexes if any
10. Generate entire SUR Doc for preview
11. Approve SUR

- Military or Police
- ME quantity
- SS Categories
- Update outside system
- outside system
- outside system
- outside system
SUR without SAT - Steps

1. Click on SUR icon in the UCM
2. Click on “SUR List”
3. Click on “NEW” button
4. Insert the info needed
5. Note that can be done at List level or Form level
Open the SAT by clicking on the hyperlink on the SAT List once the SAT Header has been created.

1. Click on “Annex A Header”
2. Click on NEW
3. “Unit Strength” will be triggered automatically from Troop/Police Strength
4. Add Remarks if any
SUR without SAT - Steps

1. Click on “Annex B/C Header”
2. Click on “New” button
3. Insert Remarks if any
4. To add items, click on “New” in the “Annex B/C Line Items” section
5. Select an item under the Category or Sub-Category
   - For Annex B, enter the Quantity and remarks if any
   - For Annex C, update Services Provider and Applicable Strength
6. If the desired line item is visible select it, otherwise click on the "Query" button to search for the desired item
Best Practice: Use of SUR template

1. Go on System Documents
2. Select the SUR Template to download it
3. Click on the downloaded document to open it

Note that the update of the SUR template is done outside the system.
SUR without SAT – Steps

To add attachments to the SUR:
1. Click on “Attachments” Header
2. Click on “New File” or “New URL”
3. Select the desired document or link
4. Click on “Add” button
SUR without SAT – Steps

Best Practice: the printed Annex B and C reports should be merged with the main body SUR in MS Word - outside of the system:
Select the element(s) you want to export/print
1. Click on Menu
2. Select “Print Preview” or “Print”
3. A Pop-Up will be generated
Demo on Creation of SUR without SAT
Reporting in UCM
Reporting in UCM – Two main components

My BIP reports

My Reports - Inbox

Individual Report - Parameters

Managing your reports in UCM

Report icon
Reporting in UCM – Launch a Report in 10 steps

1. Go to SURs
2. Select the graph icon
3. A pop up window will appear
4. Click on Submit
Reporting in UCM – Accessing your Report

1. Go to my BIP reports
2. Click on the report link
3. Report will be shown in your screen
4. File will be downloaded into your computer
Demo on Reporting
For ALL users
Create a SUR without SAT
• Create a SUR and its annexes based on instructions provided via email
• Export Annex B and C and upload them in the system together with your answers to the exercise
(In case of issues, contact us ucstraining@un.org)

Instructions:
• 2 documents
  • Word doc with instructions for the exercises
  • Excel with “credentials” per participants to create SAT and/or SUR
• 1h support session after the WebEx for the exercises
Thank you!

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