

# 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



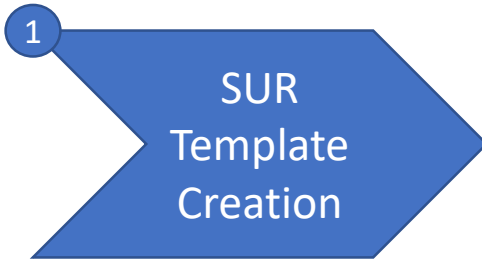
# Creation of SUR without SAT



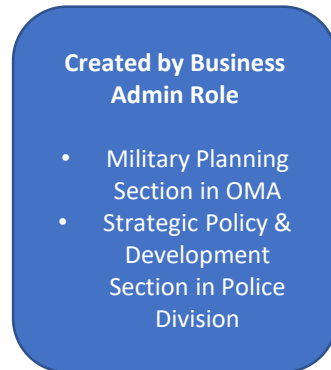


# SUR without SAT

## Process

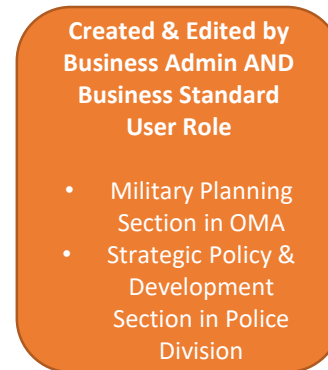


## Roles

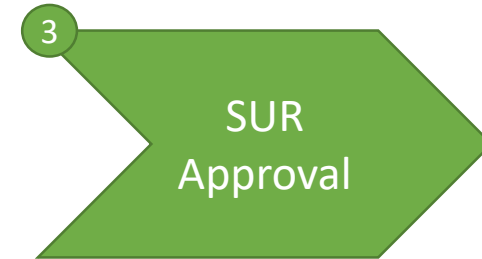


## Objectives

- 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.



- 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.

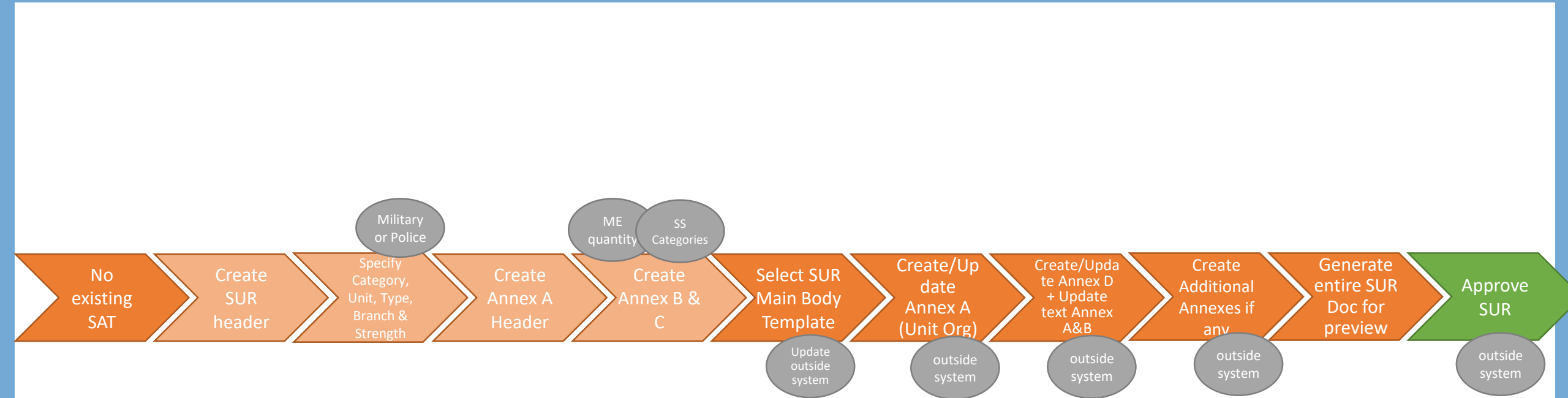


- To obtain approval of the SUR draft, in accordance to COE policies.
- To retain a copy of the scanned document after signature.
- To record the date of signature of the physical copy of the SUR.
- To form a basis for the creation of MOUs with T/PCCs for the specific Mission and Unit Types.





# Create SUR without SAT





# SUR without SAT - Steps

Create SUR header & Select Type

Specify Category, Unit, Type, Branch & Strength

Military or Police

unite iNeed File Edit View Navigate Query Tools Help

All SUR

Home Service Work Order MoU Annex Verification Reports Inspections Equipment Activities **SURs** MoUs Claims Global Lookup Comparison Report System Documents

SAT SUR List

ALL SUR

All SUR Menu **New** Delete Query

Document Number	Mission Name	Unit Category	Unit Type	Branch	Unit Size	Unit Specialization	Status	Sub Status	Effective Date	Expiration Date	Version Number	SAT Name
							Draft	Work in Progress	03/12/2018		1	
DPO-SUR-MINUSMA-Intelligence/Unit/NON...	MINUSMA	Military	Combat	Intelligence	Unit	NONE	Draft	Work in Progress	03/12/2018		1	Combat/Intelligence/Unit
DPO-SUR-MINUSTAH-Aviation/Formed Poli...	MINUSTAH	Police	Law Enforcement	Aviation	Formed Police ...	Medium Utility H...	Internally Concurred	Signed	27/11/2018		1	
DPO-SUR-MINURCAT-Aviation/Formed Poli...	MINURCAT	Police	Law Enforcement	Aviation	Formed Police S...	NONE	Draft	Work in Progress	27/11/2018		1	Law Enforcement/Aviation/Formed Police Section
DPO-SUR-MINURSO-Maritime/Formed Poli...	MINURSO	Police	Specialized	Maritime	Formed Police S...	Forensics	Draft	Work in Progress	26/11/2018		1	
DPO-SUR-MINUSCA-Riverine/Hospital - Le...	MINUSCA	Military	Enabling	Riverine	Hospital - Level 1	Mechanized	Internally Concurred	Signed	26/11/2018		1	
DPO-SUR-MINUSTAH-Aviation/Battery/Res...	MINUSTAH	Military	Enabling	Aviation	Battery	Reserve	Internal Concurrence	Work in Progress	20/11/2018		1	Enabling/Aviation/Battery
DPO-SUR-UNIFIL-Aviation/Formed Police S...	UNIFIL	Police	Specialized	Aviation	Formed Police S...	Specialized Polic...	Internally Concurred	Signed	19/11/2018		1	Specialized/Aviation/Formed Police Section
DPO-SUR-MINUSCA-Intelligence/Team/Sup...	MINUSCA	Military	Enabling	Intelligence	Team	Support	Draft	Work in Progress	19/11/2018		1	
DPO-SUR-UNPCRS-Intelligence/Unit/NONE-1	UNPCRS	Military	Combat	Intelligence	Unit	NONE	Draft	Work in Progress	16/11/2018		1	Combat/Intelligence/Unit

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

LIST

SUR

Menu New Delete Query

Document Number:

SC Resolution:

Version Number: 1 Creation Date: 03/12/2018

Mission Name: \* Review Date:

Type: SUR Effective Date: 03/12/2018

Status: Draft Expiration Date:

Sub Status: Work in Progress Signature Date:

Created by:

Unit Category: \* Unit Type: \* Branch: \* Unit Size: \* Unit Specialization: \*

Unit Location: \* Unit Structure: \* Unit Remarks:

Confidential Sections Remarks: None

Troop/Police Strength: \*

FORM





# SUR without SAT

Create Annex A Header

unite iNeed File Edit View Navigate Query Tools Help

Annex A Header

Home Service **SURs** MoUs System Documents Work Order MoU Annex My BIP Reports Verification Reports Inspections Equipment

SAT List **SUR List**

**SUR**

Menu New Delete Query

Document Number: DPO-SUR-MINUSCA-Cavalry/Unit/NONE-1 Created by: Saida SAGUIR Unit Location: Bangui

SC Resolution: Unit Category: Military

Version Number: 1 Creation Date: 03/12/2018 Unit Type: Enabling Unit Structure: n/a

Mission Name: MINUSCA Review Date: Branch: Cavalry

Type: SUR Effective Date: 03/12/2018 Unit Size: Unit Unit Remarks:

Status: Draft Expiration Date: Unit Specialization: NONE Confidential Sections Remarks: None

Sub Status: Work in Progress Signature Date: Troop/Police Strength: 100

**Annex A Header** Annex B Header Annex C Header Attachments Audit Trail

**ANNEX A HEADER**

Menu **New** Delete Query

Mission Name	Unit Strength	Remarks
MINUSCA	100	

Open the SAT by clicking on the hyperlink on the SAT List once the SAT Header has been created.

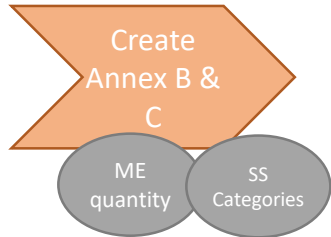
1. Click on "Annex A Header"
2. Click on NEW
3. "Unit Strength" will be triggered automatically from Troop/Police Strength
4. Add Remarks if any







# SUR without SAT - Steps



**unite iNeed** File Edit View Navigate Query Tools Help

Annex B Header

Home Service **SURs** MoUs System Documents Work Order MoU Annex My BIP Reports Verification Reports Inspections Equipment

SAT List **SUR List**

**SUR**

Menu New Delete Query

Document Number: DPO-SUR-MINUSCA-Cavalry/Unit/NONE-1 Created by: Saida SAGUIR Unit Location: Bangui

SC Resolution: Unit Category: Military

Version Number: 1 Creation Date: 03/12/2018 Unit Type: Enabling

Mission Name: MINUSCA Review Date: Branch: Cavalry

Type: SUR Effective Date: 03/12/2018 Unit Size: Unit

Status: Draft Expiration Date: Unit Specialization: NONE

Status: Work in Progress Signature Date: Troop/Police Strength: 100 Confidential Sections Remarks: None

Annex A Header **Annex B Header** Annex C Header Attachments Audit Trail

**ANNEX B HEADER**

Menu **New** Delete Query

Mission Name	Remarks
MINUSCA	

**ANNEX B LINE ITEMS**

Menu **New** Delete Query

Description	Category	Sub Category	Quantity	Remarks
PHONE PATCH INTERLINK (SPECIAL CASE)	COMMUNICATIONS EQUIPMENT	HF EQUIPMENT		

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





# SUR without SAT – Steps

Select SUR  
Main Body  
Template

Update  
outside  
system

unite iNeed

File Edit View Navigate Query Tools Help

System Documents:

Home Service Work Order MoU Annex Verification Reports Inspections Equipment Activities SURs MoUs Claims Global Lookup Comparison Report System Documents

System Documents

SYSTEM DOCUMENTS

Menu Query

Application	Type	File Name	Description	File Type	Size	Modified
RAPS	User Manual	contingent-owned_equipment_manual_2017		pdf	2,935,496	26/11/2018 10:25:09 PM
RAPS	User Manual	Individual Police Kit		docx	13,816	28/11/2018 08:29:07 PM
RAPS	User Manual	SUR Template		docx	166,820	28/11/2018 08:29:50 PM

SUR Template (1).docx

**Best Practice: Use of SUR template**

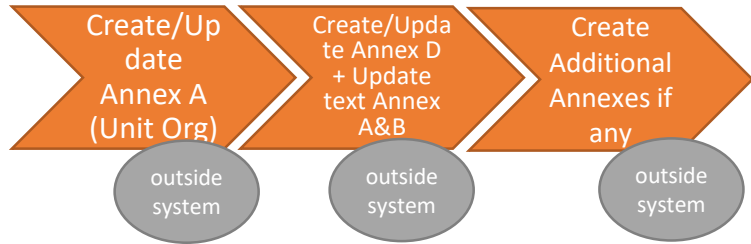
1. Go on System Documents
2. Select the SUR Template to download it
3. Click on the downloaded document to open it

**Note that the update of the SUR template is done outside the system**





# SUR without SAT – Steps



**unite iNeed** File Edit View Navigate Query Tools Help

Attachments: Home Service Work Order MoU Annex Verification Reports Inspections Equipment Activities **SURs** MoUs Claims Global Lookup

SAT List **SUR List**

### SUR

Menu New Delete Query

Document Number: DPO-SUR-MINUSMA-Intelligence/Unit/NONE-1 Created by: Saïda SAGUIR

SC Resolution: Unit Category: Military

Version Number: 1 Creation Date: 03/12/2018 Unit Type: Combat

Mission Name: MINUSMA Review Date: Branch: Intelligence

Type: SUR Effective Date: 03/12/2018 Unit Size: Unit

Status: Draft Expiration Date: Unit Specialization: NONE

Sub Status: Work in Progress Signature Date: Troop/Police Strength: 200

Unit Location: Bangui

Unit Structure: N/A

Unit Remarks:

Confidential Sections Remarks: None

Annex A Header Annex B Header Annex C Header **Attachments** Audit Trail

### ATTACHMENTS

Menu Delete Query **New File** **New URL**

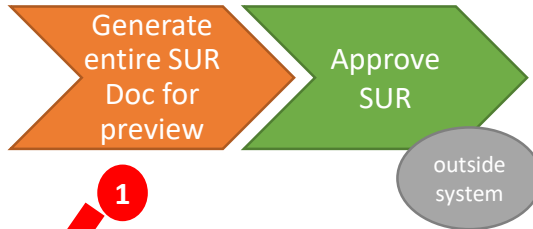
Attachment Type	Attachment Name	Size (In Bytes)	Remarks	Uploaded by
URL	<a href="http://dag.un.org/handle/11176/400675">http://dag.un.org/handle/11176/400675</a>			SSAGUIR
xlsx	Unit Naming and Classification - Final	13,690		SSAGUIR

- 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



**1**

SUR

Menu New Delete Query

R-MINUSMA-Intelligence/Unit/NONE-1

Created by: Saida SAGUIR

Unit Location: \* Bangui

Unit Category: \* Military

Unit Type: \* Combat

Unit Structure: \* N/A

Branch: \* Intelligence

Unit Size: \* Unit

Unit Specialization: \* NONE

Unit Remarks:

Confidential Sections Remarks: None

Signature Date: [Red Box]

Troop/Police Strength: \* 200

Print Preview... [Red Box]

**3**

My Mission Annexes - Google Chrome

https://crmuatrap.un.org/epublicsector\_enu/start.swe?SWECmd=GetCachedFrame&SWEC=22&SWEFrame=\_swecient....

**SUR**

Document Number: DPO-SUR-MINUSMA-Intelligence/Unit/NONE-1

Created by: Saida SAGUIR

Unit Location: Bangui \*

SC Resolution:

Version Number: 1

Creation Date: 03/12/2018

Unit Category: \* Military

Unit Type: \* Combat

Unit Structure: \* N/A

Mission Name: \* MINUSMA

Review Date:

Branch: \* Intelligence

Type: SUR

Effective Date: 03/12/2018

Unit Size: \* Unit

Unit Remarks:

Status: Draft

Expiration Date:

Unit Specialization: \* NONE

Sub Status: Work in Progress

Signature Date:

Troop/Police Strength: \* 200

Confidential Sections Remarks: None

**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

**2**

Annex A Header Annex B Header **Annex C Header** Attachments Audit Trail

**ANNEX C HEADER**

Menu New Delete Query

Mission Name	Remarks
MINUSMA	test valencia

**ANNEX C LINE ITEMS**

Menu New Delete Query

Category	Sub Category	Services Provided By	Applicable Strength	Remarks
CATERING	GENERAL	CC	200	
LAUNDRY	GENERAL	UN	200	
ACCOMMODATION	GENERAL		0	

My Mission Annexes - Google Chrome

https://crmuatrap.un.org/epublicsector\_enu/start.swe?SWECmd=GetCachedFrame&SWEC=44&SWEFrame=\_swecient....

**Annex C Line Items**

Category	Sub Category	Services Provided By	Applicable Strength	Remarks
ACCOMMODATION	GENERAL		0	
LAUNDRY	GENERAL	UN	200	
CATERING	GENERAL	CC	200	





# Demo on Creation of SUR without SAT





# Reporting in UCM





# Reporting in UCM – Two main components

**A** My BIP reports

**B** Report icon

**My Reports - Inbox**

Report Name	Created Date	Owner	Status	File Size	Output Type	Report Access	Query String
RAPS SUR Annex B	04/12/2018 04:44:59 PM	CRIADO CORTAZAR, Daniel	Success	1,229	PDF	MEVANGELIO	(([Id] = '1-3ZCE')
RAPS SUR Annex C	04/12/2018 04:42:31 PM	CRIADO CORTAZAR, Daniel	Success	1,864	PDF	MEVANGELIO	(([Id] = '1-3Z4T')
test	04/12/2018 12:16:37 PM	CRIADO CORTAZAR, Daniel	Error			MEVANGELIO	((Owner Id] = LoginId (])

**Individual Report - Parameters**

**Managing your reports in UCM**

REPORT PARAMETERS

Report Name: RAPS SUR Annex B    Status: Success    Created Date: 04/12/2018 04:44:59 PM    Task Id: 11534371

Output Type: PDF    Owner: DCRIADO    Start Time: 04/12/2018 04:44:59 PM    File Size: 1,229

Locale: ENU    Report Access: MEVANGELIO    End Time: 04/12/2018 04:45:22 PM    View Mode: All

Error Message:

Description:

Tags:

Query String: (([Id] = '1-3ZCE')

Bookmark: "RAPS SUR: Search = "([Id] = '1-3ZCE')"; RAPS SUR: FixedSort = "Name Default, Revision"; RAPS SUR Annex Header: Search = "([Id] = '1-3ZCF")"





# Reporting in UCM – Launch a Report in 10 steps

Uniformed Capabilities Management System

File Edit View Navigate Query **1** Help

Go to SURs

**3**

Annex B Header:

- Customer Survey
- Home
- Employees
- My BIP Reports
- SURs**
- Service
- System Documents
- MoU Annex
- Work Order
- Assets
- Verification Reports
- Inspections
- Equipment
- Activities
- MoUs
- Global Lookup

SAT List **SUR List**

**SUR**

Menu New Delete Query

Document Number: DPO-SUR-UNDOF-Intelligence/Battery/Heavy Utility Heil...

Created by: Pedro PONTE

Unit Location: \*

SC Resolution:

Unit Category: \* Military

Unit Type: \* Enabling

Unit Structure: \* 32

Version Number: 1

Creation Date: 02/11/2018

Branch: \* Intelligence

Unit Remarks:

Mission Name: \* UNDOF

Review Date:

Unit Size: \* Battery

Unit Specialization: \* Heavy Utility Helico...

Type: SUR

Effective Date: 02/11/2018

Confidential Sections Remarks: None

Status: Draft

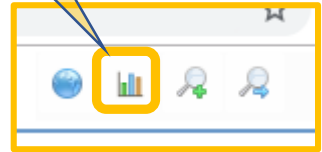
Expiration Date:

Sub Status: Work in Progress

Signature Date:

Troop/Police Strength: \*

Select the graph icon



**4**

**2** Annex B Header

A pop up window will appear

Annex A Header Annex B Header Annex C Header Attachments Audit Trail

**ANNEX B HEADER**

Menu New Delete Query

Mission Name	Remarks
UNDOF	

**5**

**ANNEX B LINE ITEMS**

Menu New Delete Query

Description	Category	Sub Category	Quantity	Remarks
PROTECTIVE EQUIPMENT FOR STAFF AN...	MEDICAL AND DENTAL	MEDICAL AND DE...	10	

**Run Report**

Report Name: RAPS SUR Annex B

Custom Name:

Output Type: PDF

Report Locale: English - United States

My Reports Submit

Click on Submit

**6**







# Reporting in UCM – Accessing your Report

Uniformed Capabilities Management System

File Edit **7** Navigate Query Tools Help

My Reports: **Go to my BIP reports**

Customer Survey Home Employees **My BIP Reports** SURs Service System Documents MoU Annex Work Order Assets Verification Reports Inspections Equipment Activities MoUs Global Lookup

Reports History

**MY REPORTS**

8 [Menu] [Delete] [Query] 1 - 3 of 3

Report Name	Created Date	Owner	Status	File Size	Output Type	Report Access	Query String
RAPS SUR Annex B	04/12/2018 04:44:59 PM	CRIADO CORTAZAR, Daniel	Success	1,229	PDF	MEVANGELIO	{(Id) = '1-3ZCE'}
RAPS SUR Annex C	04/12/2018 04:42:31 PM	CRIADO CORTAZAR, Daniel	Success	1,864	PDF	MEVANGELIO	{(Id) = '1-3Z4T'}
test	04/12/2018 12:16:37 PM	CRIADO CORTAZAR, Daniel	Error			MEVANGELIO	{(Owner Id) = LoginId ()}

**Click on the report link**

**REPORT PARAMETERS**

10 OF 3

Report Name: RAPS SUR Annex B Status: Success Created Date: 04/12/2018 04:44:59 PM Task Id: 11534371

Output Type: PDF Owner: DCRIADO Start Time: 04/12/2018 04:44:59 PM File Size: 1,229

Locale: ENU Report Access: MEVANGELIO End Time: 04/12/2018 04:45:22 PM View Mode: All

Error Message: Query String: {(Id) = '1-3ZCE'}

Description: Bookmark: RAPS SUR: Search = "{(Id) = '1-3ZCE'}" RAPS SUR: FixedSort = "Name Default, Revision" RAPS SUR Annex Header: Search = "{(Id) = '1-3ZCF'}"

Tags:

**9**

RAPS SUR Annex ....PDF

File will be downloaded into your computer

UNCLASSIFIED

DPKO/MONUSCO/Fix wings-Infantry-Platoon/2018/1 Annex B

**MAJOR EQUIPMENT REQUIREMENTS**

Item	Quantity	Remarks
<b>COMBAT VEHICLES</b>		
APC TRACKED MORTAR	34	
<b>VHF/UHF EQUIPMENT</b>		
VHF ALARM UNITS	30	
<b>TELEPHONE EQUIPMENT</b>		
TELEPHONE EXCHANGE PABX 1 - 100 LINES	100	
<b>MEDICAL AND DENTAL EQUIPMENT</b>		
AUTOMATIC FILM PROCESSOR	30	
PROTECTIVE EQUIPMENT FOR STAFF AND PATIENTS	500	
<b>RIOT CONTROL EQUIPMENT - OTHER RIOT CONTROL EQUIPMENT</b>		
PORTABLE /MOBILE BULLET PROOF SHIELDS (SPECIAL CASE)	56	

Report will be shown in your screen





# Demo on Reporting





# Exercises

## 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](mailto: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!

Umoja Coordination Service (UCS)  
TRAINING TEAM

[ucstraining@un.org](mailto:ucstraining@un.org)

