



# Field Support Suite

*Delivering Unified IT Solutions*

**FSS-Umoja Offline forms (for Deep Field and Master Data  
update requests)**



# FSS-Umoja Offline Forms User Manual – Requestor role

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## 1. About the Offline Forms module

The Offline Forms (OF) module is a tool to create, store in a centralized repository, monitor and manage forms relevant to the Umoja business processes. It provides a technical solution for the administrators and a simplified approach for the user community, i.e. all UN offices that have to utilize form templates available on our website. The site is designed to enable you to find and fill in official forms. Currently, the selection is limited to some of the most commonly used forms, however, other forms will be added as they become available.

The Offline Forms module has been built within the framework of the Field Support Suite. The Field Support Suite (FSS) is a modular set of applications designed to standardize and support common mission business functions and automate processes and workflows. The applications are web-based and accessed by personnel through the standard web browser from the UN Network.

## 2. Roles

Within the Offline Forms module users are assigned to one or more of the following roles:

- OF Requestor, who is responsible for entering data using the Form templates and sending completed forms by email.
- OF Regional Officer, who is responsible for reviewing, approving the data entered by the OF Requestor; Form processing and Status managing.
- OF Administrator, who is responsible for creation of new Form templates and Lookup updates.

This manual describes functionality related to the **Requestor** role. A separate manual describes Regional Officer and Administrator functionality.



### **3. Before You Start – Some Important Concepts**

Before using the Offline Forms, it is important to ensure you have required MS Office configuration. The Offline Forms are created with Microsoft Office InfoPath, a powerful editing engine that enables end users to interface easily with data. InfoPath forms allow users to access key business data with familiar, document-like features. The forms can range from simple forms for collecting data to complex forms that are part of a much larger business process.

Microsoft InfoPath 2003 or above is required to open and complete the forms. InfoPath is part of the MS Office suite installed in the PK missions.

Offline Forms provide a centralized management system which allows administrators to upgrade dropdown lists and involved forms. Forms are accessible on iSeek and can be distributed by email or stored on shared or local drives. Upon opening forms from any source, they will be automatically updated. Therefore, even local copies of old forms will be up to date if the user has network connection when opening them.



## How do I check / install MS InfoPath?

MS InfoPath is installed on client computers as a part of Microsoft Office Professional suite.

### How to check if InfoPath is installed

1. Click Start, go to **All Programs**
2. Select **Microsoft Office**
3. Check if Microsoft Office InfoPath is listed

### How to add Microsoft InfoPath 2003 on Windows XP\*

1. Click **Start**, then select **Control Panel**
2. Double-click **Add or Remove Programs**
3. Highlight **Microsoft Office Professional Edition 2003**, then click **Change**
4. Select **Add or Remove Features**, then click **Next**
5. Click **InfoPath** Checkbox, then click **Update**
6. Click **Close** when completed

### How to add Microsoft InfoPath 2010 on Windows XP\*

4. Click **Start**, then select **Control Panel**
5. Double-click **Add or Remove Programs**
6. Highlight **Microsoft Office Professional Plus 2010**, then click **Change**
7. Select **Add or Remove Features**, then click **Continue**
8. Click **InfoPath** Dropdown, then select **Run from My Computer**, then click **Continue**
9. Click **Close** when completed

### How to add Microsoft InfoPath 2010 on Windows 7\*

1. Click **Start**, then select **Control Panel**
2. Click **Programs**, then click **Programs and Features**
3. Highlight **Microsoft Office Professional Plus 2010**, then click **Change**
4. Select **Add or Remove Features**, then click **Continue**
5. Click **InfoPath** Dropdown, then select **Run from My Computer**, then click **Complete**
6. Click **Close** when completed

\* In some cases, assistance from your technical IT focal points is required to run "Add or Remove Features"



## 4. Getting started

Requestor navigates to Form Template List webpage, which is accessible on the iSeek – Umoja – Umoja Forms and does not require login (scr. 1). Using the Search functionality, requestor finds form template and clicks on the Title to open or save the form.

Scr. 1

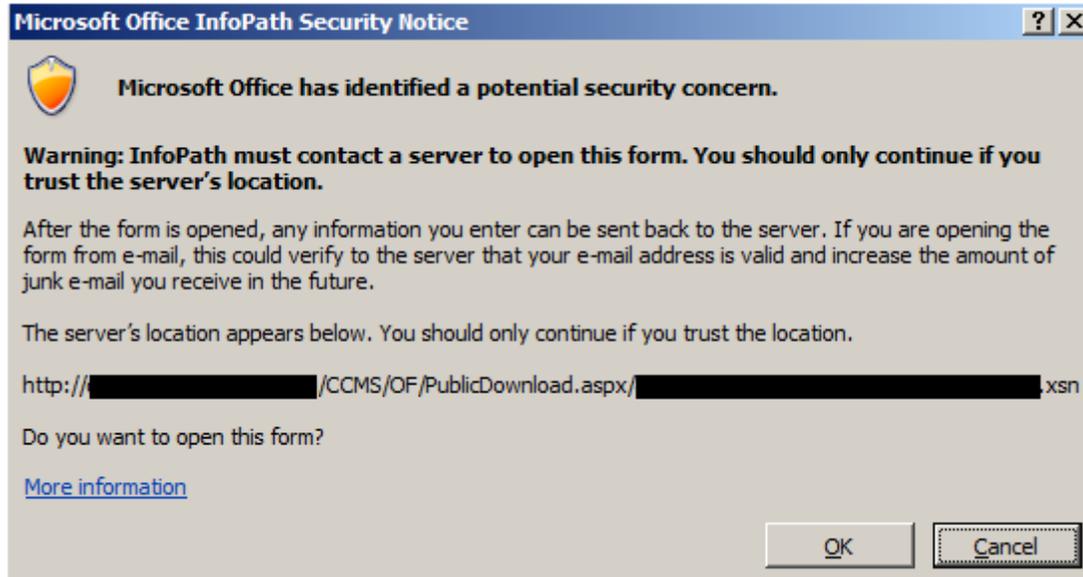
Functional Area	Category	Title
Data Maintenance	Finance	<a href="#">PRO Activity Type</a>
Data Maintenance	Finance	<a href="#">PRO Funds Center</a>
Data Maintenance	Finance	<a href="#">PRO Funds Master</a>
Data Maintenance	Finance	<a href="#">PRO IMIS General Ledger Accounts</a>
Data Maintenance	Finance	<a href="#">PRO Cost Center</a>
Data Maintenance	Finance	<a href="#">PRO DG Grant</a>

### To Open Form template

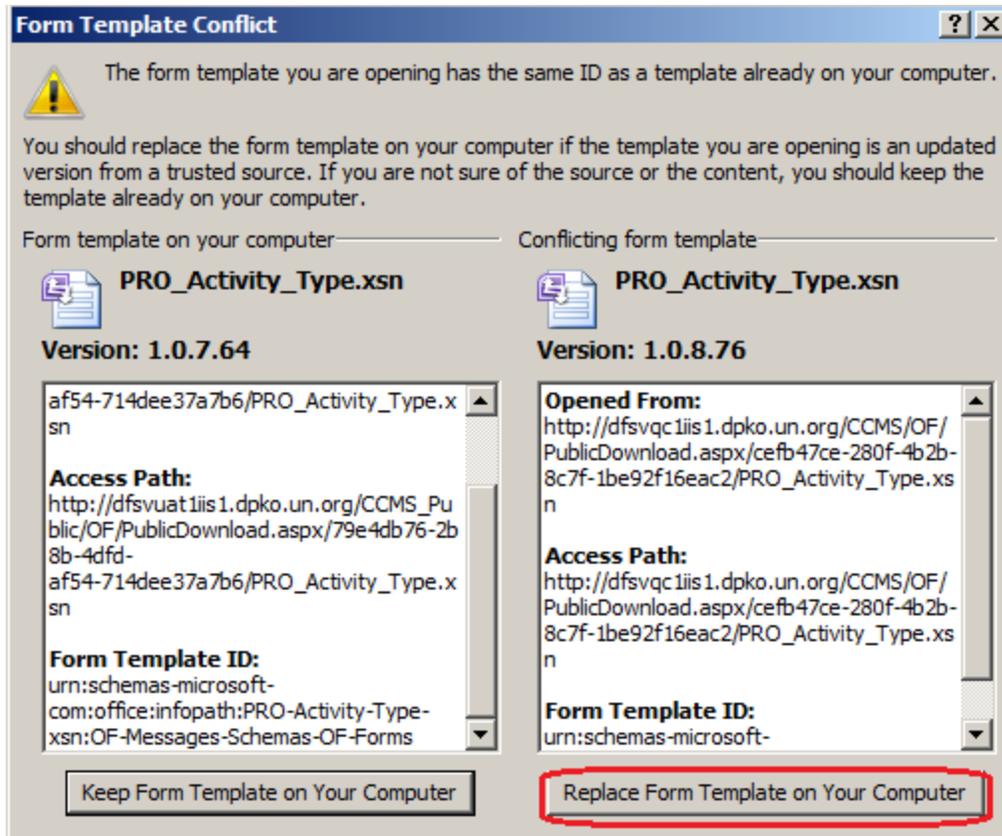
1. Click on the form title
2. Select Open
3. A window may appear with a Security Notice (scr. 2), click on OK
4. If you have a previous form version saved on your PC, you will be prompted to replace it with a new form template (scr. 3). Click on the “Replace Form Template on Your Computer” button. Always using a new form template ensures that all lookups and form design are up to date
5. Then a window opens with a progress bar (scr. 4)
6. Form template opens in InfoPath



Scr. 2

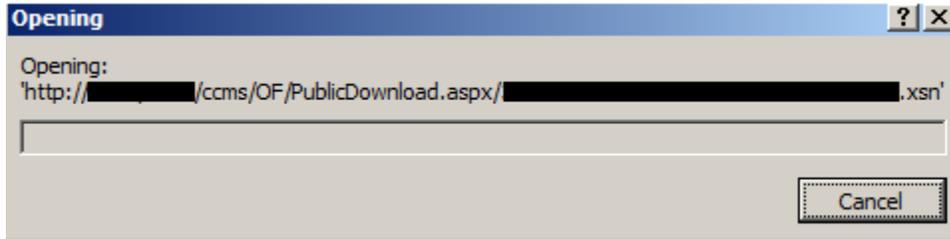


Scr. 3





Scr. 4



## To Save Form template

1. Click on the form title
2. Select Save or Save As
3. Save file locally
4. Double click on the form to open
5. A window may appear with a Security Notice (scr. 2), click on OK
6. A window may appear with a prompt to update local template to a newer version (scr. 3), always click “Replace From Template on Your Computer”
7. Then a window opens with a progress bar (scr. 4)
8. Form template opens in InfoPath

## To Fill-in Form instance<sup>1</sup>

Form template opens in Microsoft InfoPath (scr. 5).  
Complete the form.

Tips to faster move between fields by using the keyboard:

- To move forward to the next field, press TAB.
- To move backward to the previous field, press SHIFT+TAB.
- To move the insertion point up or down between rows in a table, press the UP ARROW or DOWN ARROW key, respectively.

Required fields are highlighted in yellow (scr. 5).

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<sup>1</sup> Form template is a blank template and Form instance is a completed form



Scr.5

<b>Instructions</b>			
<b>UNITED NATIONS</b>			
<b>Umoja Data Maintenance Request</b>			
<b>Asset Master</b>			
Send to: <a href="mailto:umoja-mdm@un.org">umoja-mdm@un.org</a>			
		required	
		optional	
		not applicable	
Date Required			
<b>Umoja Information</b>			
Action	<input checked="" type="radio"/> Create	<input type="radio"/> Update	
Asset Number			
Asset Class			
Asset description			
Additional asset description			
Inventory number			
Cost Center			
Business Area			
FM: Budget Period			
Functional Area			
Funds Center		Internal order	

Some fields are formatted to accept only allowed data entry, for e.g. numeric values. Validation error appears when you enter a wrong value (Scr. 6).

Scr. 6

Planned Useful Life In Years *	asd	Planned Useful Life In Periods *	sdf
	Only integers allowed		
<small>* Mandatory for classes: 'specialized vehicles, combat trailers and attachments', infrastructure assets, 'buildings - fixed', 'buildings - commercial finance leases', 'buildings - donated rights to use', all intangibles classes</small>			

Some forms have Repeating tables, which allow inserting more lines before or after the selected line. Move mouse over the repeating table lines, click on the arrow to Insert before / after, or Remove (Scr. 7).

Scr. 7



# UNITED NATIONS Umoja Data Maintenance Request Business Partner

Send to: [umoja-mdm@un.org](mailto:umoja-mdm@un.org)

	required
	optional
	not applicable

Date Required	<input style="background-color: yellow;" type="text"/>
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General Data			
Action	<input checked="" type="radio"/> Create	<input type="radio"/> Update	<input type="radio"/> Block
Business Partner Number	<input style="background-color: gray;" type="text"/>	UNGM Number	<input type="text"/>
Business Partner Grouping	<input style="background-color: yellow;" type="text"/>		
Legal Form	<input type="text"/>		
Purpose	<input type="text"/>		
Name of Organization	<div style="border: 2px solid red; padding: 5px;"><p>Please move your mouse over the text box below and click on the drop down arrow to insert more lines if needed</p><input style="background-color: yellow;" type="text"/><hr style="border-top: 1px dashed gray;"/><input style="background-color: gray;" type="text"/></div>		
Title	<input style="background-color: yellow;" type="text"/>	Building/House Number	<input style="background-color: yellow;" type="text"/>
Street	<input style="background-color: yellow;" type="text"/>		



### **To Save Form instance**

1. Click File Tab, and then click Save or press CTRL+S
2. You must enter a name for the file if you are saving it for the first time.

### **To Print Form instance**

1. Click the File tab, and then click Print.
2. Under Quick Print, click Print.
3. In the Print dialog box, specify the printer settings for the form, and then click OK.

### **To Submit Form instance by email**

1. Create an email.
2. Attach previously saved form instance.
3. Send email to the address specified on the form.
4. You will receive confirmation delivery or delivery failure email.



## 5. Form Status Monitoring - Optional

This is an optional feature; it is available for Requestors with an FSS account. Requestors can review the forms they submitted and monitor Delivery and Process status of their forms by logging to FSS – Offline Forms – Form Instance List (scr. 8).

Scr. 8

**Form Instance List**

**Search**

Requestor:       Delivery:       Process Status:

Title:       Functional Area:

Reception Date:       All    Last Week    Last Month    On Range

Delivery Date:       All    Last Week    Last Month    On Range

Requestor	Reception Date	Title	Functional Area	Routing	Delivery	Delivery Date	Process Status
FatimaTkhashev@dfs1iis1.dpk.un.org	10/07/2013	<a href="#">Belen</a>	Data Maintenance	iNeed	PENDING	11/07/2013	PROCESSED
FatimaTkhashev@dfs1iis1.dpk.un.org	11/07/2013	<a href="#">Asset Master</a>	Data Maintenance	Umoja	N/A	11/07/2013	PENDING
FatimaTkhashev@dfs1iis1.dpk.un.org	11/07/2013	<a href="#">Asset Master</a>	Data Maintenance	Umoja	N/A	11/07/2013	PENDING

### Form Instance List legend

- Requestor                      The user that submitted a form instance. Regional Officer can see form instances only for the assigned region(s).
- Reception Date              Date when the form was received by the Offline forms module.
- Title                              Title of the form template (not form instance). For e.g. any form instance created using Asset Master template will appear as Asset Master.
- Functional Area              Functional Area of the form template.
- Routing                         Routing configuration of the form instance. For e.g. Data Maintenance forms will indicate iNeed.
- Delivery                         Status of delivery to the form destination(s), e.g. if the form is routed to iNeed properly, status is Delivered.
- Delivery Date                 Date the form was delivered to it's routing destination.
- Process Status                Form instance processing status, e.g. Pending, Cancelled, Processed, etc.



**Organizational Unit (Search Bar)**      Organizational Unit contains all locations, i.e. Missions, OAHs, etc. One option is unclassified, where system cannot identify Requestor's location.

## 6. How do I receive my FSS user account?

FSS Offline Forms module access is limited only to the Focal Points who need to perform their data maintenance tasks in FSS. All other Requestors do not require to have an FSS account.

If you need access to FSS please request assistance from your local Help Desk or Focal Point. Alternatively follow the register link on the FSS Login Page.

Please remember to keep in mind the following guidance when creating your password:

- When you receive your initial Username & Password by email you should immediately change the password for something easy for you to remember, but not so obvious that others can guess your password.
- Your password must have a minimum of six characters containing a least one 'letter' and one 'number'.
- Never write down or disclose your password to anyone.

## 7. How to Login

After your FSS user account is set up use your username and password to login to the Field Support Suite at: <https://fss.dfs.un.org>.



Field Support Suite  
*Delivering Unified IT Solutions*

Username:

Password:

## 8. How to request support

If you have technical questions regarding use of the FSS application or any questions regarding the Offline Forms module you may contact your local Service Desk or Focal Point. Your support request will be logged and routed to the appropriate Focal Point for resolution/support. Alternatively, you can send email with subject “Offline Forms” to [dfs-unlb-servicedesk@un.org](mailto:dfs-unlb-servicedesk@un.org).