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

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

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

Microsoft Office InfoPath Security Notice

Microsoft Office has identified a potential security concern.

Warning: InfoPath must contact a server to open this form. You should only continue if you trust the server's location.

After the form is opened, any information you enter can be sent back to the server. If you are opening the form from e-mail, this could verify to the server that your e-mail address is valid and increase the amount of junk e-mail you receive in the future.

The server's location appears below. You should only continue if you trust the location.

http://[   ]/CCMS/OF/PublicDownload.aspx/[   ].xsn

Do you want to open this form?

More information

OK   Cancel

Scr. 3

Form Template Conflict

The form template you are opening has the same ID as a template already on your computer.

You should replace the form template on your computer if the template you are opening is an updated version from a trusted source. If you are not sure of the source or the content, you should keep the template already on your computer.

Form template on your computer

PRO_Activity_Type.xsn

Version: 1.0.7.64

af54-714dee37a7b6/PRO_Activity_Type.x
sn

Access Path:
http://dfsvuat1iis1.dpko.un.org/CCMS_Pu
blic/OF/PublicDownload.aspx/79e4db76-2b
8b-4dfd-
af54-714dee37a7b6/PRO_Activity_Type.x
sn

Form Template ID:
urn:schemas-microsoft-
com:office:infopath:PRO-Activity-Type-
xsn:OF-Messages-Schemas-OF-Forms

Conflicting form template

PRO_Activity_Type.xsn

Version: 1.0.8.76

Opened From:
http://dfsvqc1iis1.dpko.un.org/CCMS/OF/
PublicDownload.aspx/cefb47ce-280f-4b2b-
8c7f-1be92f16eac2/PRO_Activity_Type.xs
n

Access Path:
http://dfsvqc1iis1.dpko.un.org/CCMS/OF/
PublicDownload.aspx/cefb47ce-280f-4b2b-
8c7f-1be92f16eac2/PRO_Activity_Type.xs
n

Form Template ID:
urn:schemas-microsoft-

Keep Form Template on Your Computer   Replace Form Template on Your Computer

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[1]

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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[1] Form template is a blank template and Form instance is a completed form

Scr.5

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

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

	required
	optional
	not applicable

Date Required	

General Data

Action	⦿ Create	○ Update	○ Block
Business Partner Number		UNGM Number	
Business Partner Grouping			▼
Legal Form			▼
Purpose			
Name of Organization	Please move your mouse over the text box below and click on the drop down arrow to insert more lines if needed		
Title		▼ Building/House Number	
Street			

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

Requestor	Reception Date	Title	Functional Area	Routing	Delivery	Delivery Date	Process Status
FatimaTkhagushevg@dfsvqc1iis1.dpko.un.org	10/07/2013	Belen	Data Maintenance	INeed	PENDING	11/07/2013	PROCESSED
FatimaTkhagushevg@dfsvqc1iis1.dpko.un.org	11/07/2013	Asset Master	Data Maintenance	Umoja	N/A	11/07/2013	PENDING
FatimaTkhagushevg@dfsvqc1iis1.dpko.un.org	11/07/2013	Asset Master	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*.

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.