Job Aid

Log an Accident/Incident Report in Umoja

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Overview

To log an Accident / Incident report, a Notification must be created in Umoja to record the occurrence.

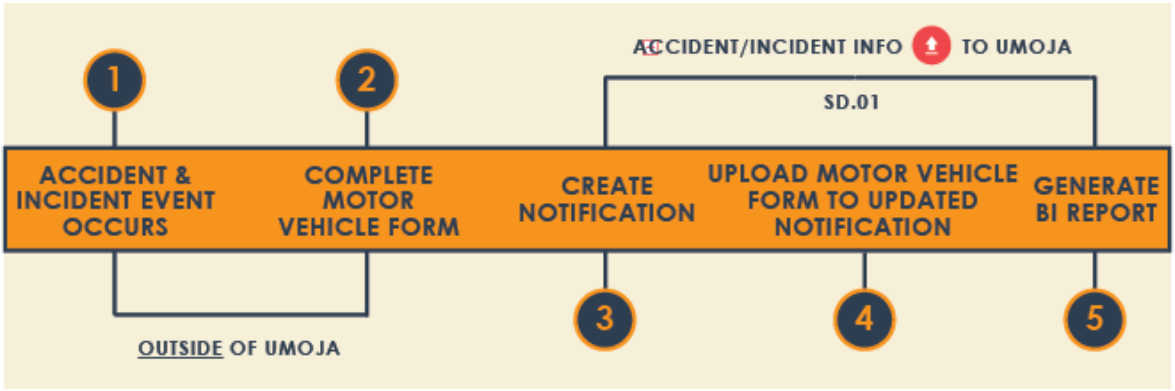
- Accidents are unintentional events caused by a driver, resulting in material damage or injuries.
- Incidents involve vehicle damage, but are not caused by the driver.

Click the Surface Transport Management in the Field Manual to view complete DFS administrative policies, procedures, and practices for the management of surface transport operations in the field.

Notifications contain information about the vehicle involved, the category of the case (whether it is an incident or an accident), and a detailed description of the case. Notifications will be reviewed to determine next steps (i.e. claims, define responsibilities, maintenance, etc.)., and will be used for reporting purposes.

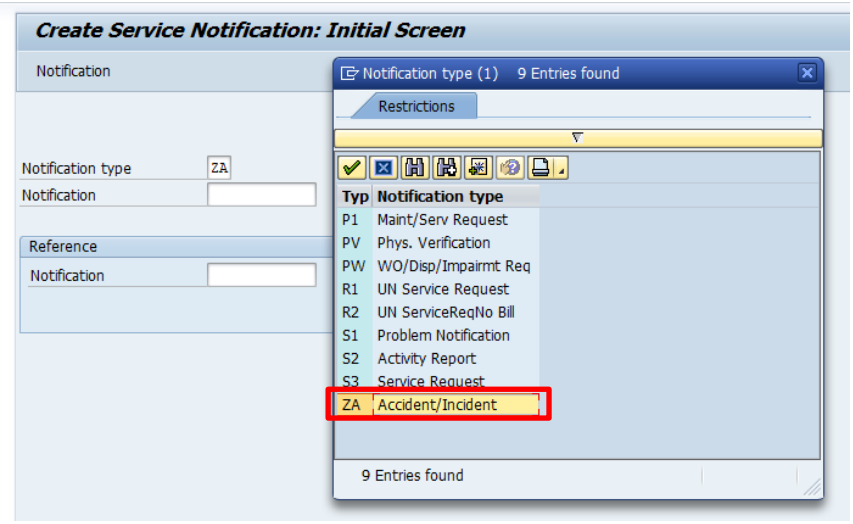
After an accident / incident occurs, drivers – or any person without Umoja access – are responsible for completing the Motor Vehicle Accident/Incident report form, and giving it to the Notification User (SD.01). Once the report form is complete, Notification Users (SD.01) are expected to:

1. Scan and locally save the report form.
2. Create a Notification in Umoja.
3. Update the Notification with details from the report form.
4. Attach the completed report form to the Notification.

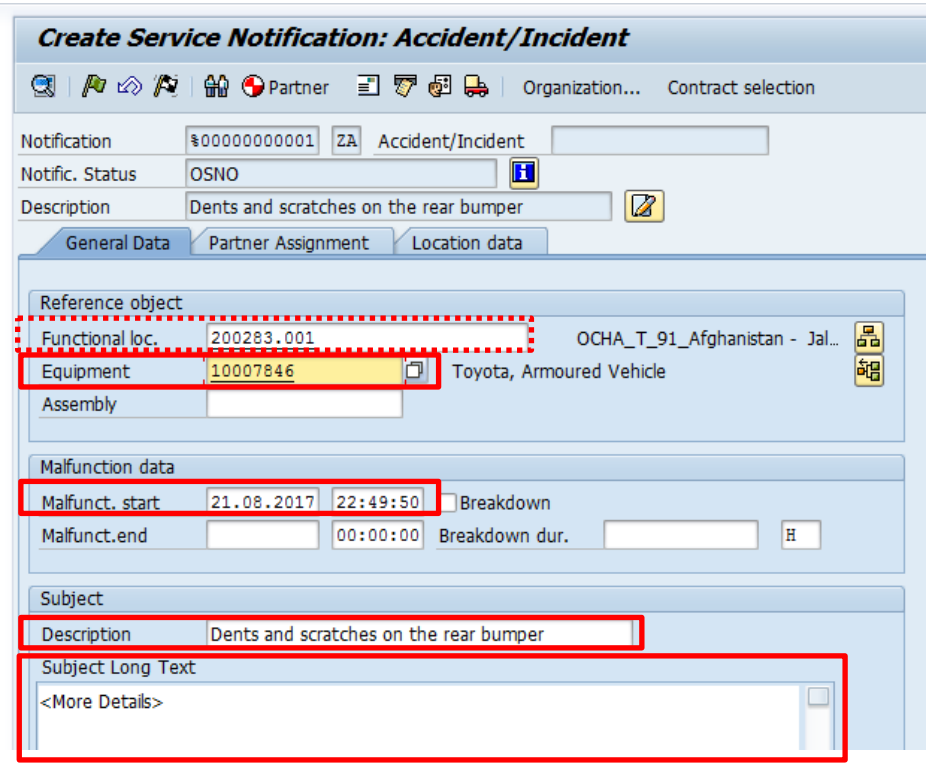


Create Accident/Incident Notification

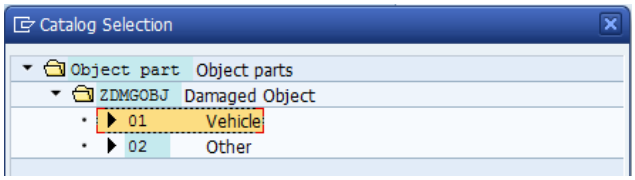
1. Execute Transaction **IW51**
2. Select Notification Type **ZA – Accident/Incident** and hit enter



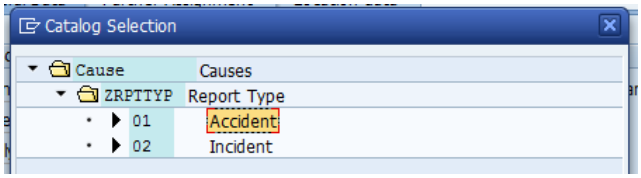
3. In the '**Create Service Notification: Accident/Incident**' screen, enter the equipment number of the damaged vehicle in the **Equipment** field. This will populate the **Functional Location** field and the **Location Data** tab.
    - Note: Use T-code **IH08** to find the equipment number, and to cross-reference vehicle details (i.e. the license plate number, vehicle make/model, etc.).
4. Enter the **Date & Time** the accident / incident occurred in the **Malfunct.start** field.
5. In the **Description** field, type in the Damage Details. The '**Subject Long Text**' can be used to add more text.



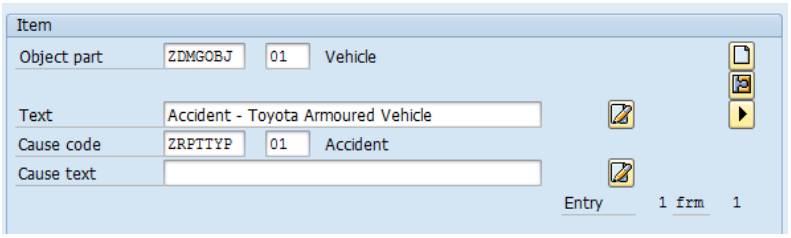
6. Select ZDMGOBJ – '**Damaged Object**' as the '**Object Part**' and select either '**01-Vehicle**' or '**02-Other**' based on what is damaged.



7. For '**Cause Code**', select ZRPTTYP – '**Report Type**' and select '01-Accident' or '02-Incident'

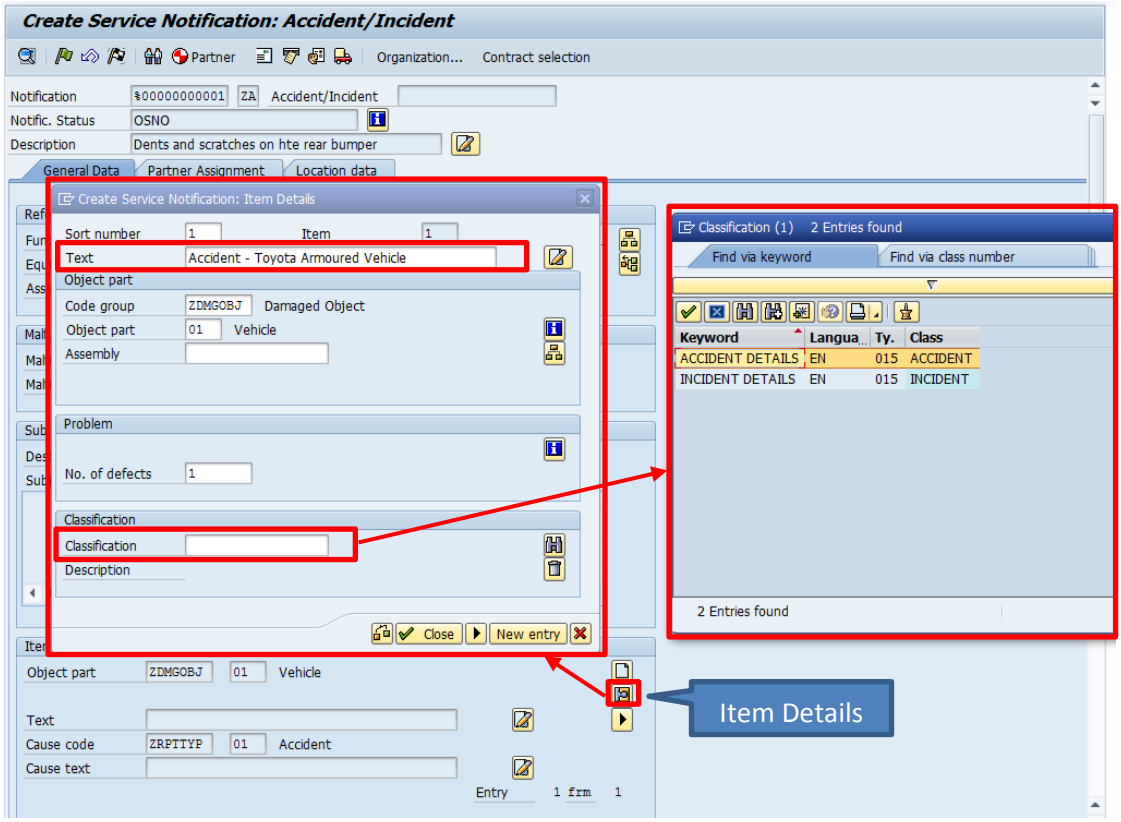


After entering the details, the screen would look like the one below:

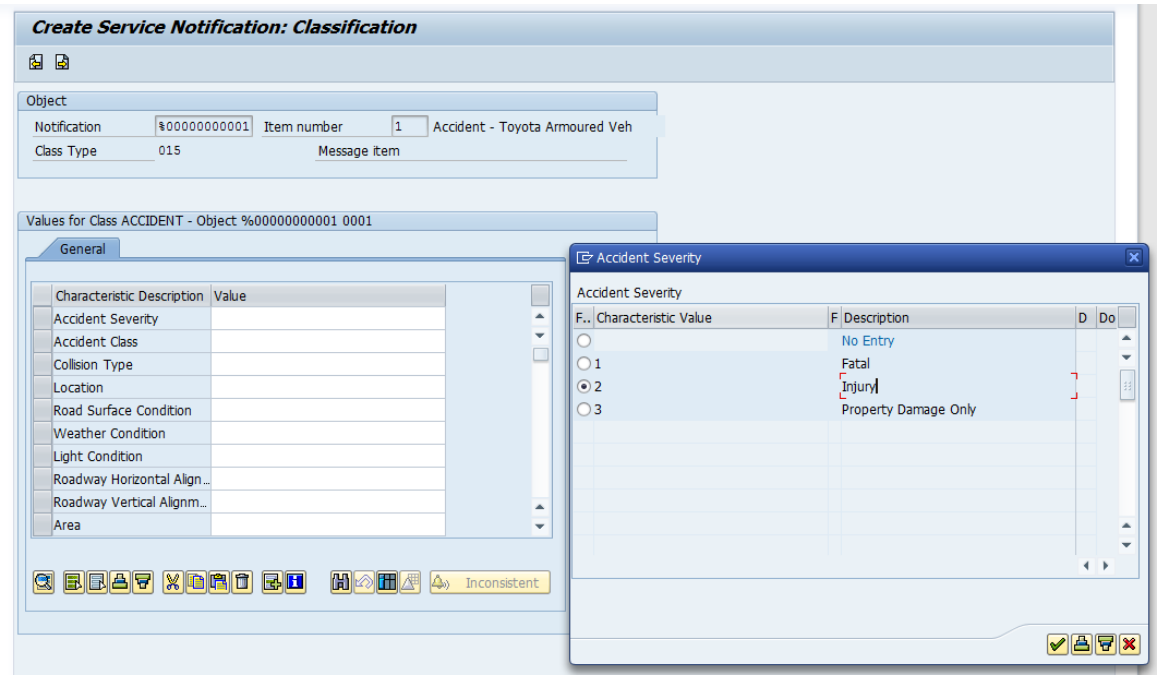


8. Click on the '**Item Details'** button . This will open up the window '**Create Service Notification Item Details**' screen. Enter the details in the Text field (optional).

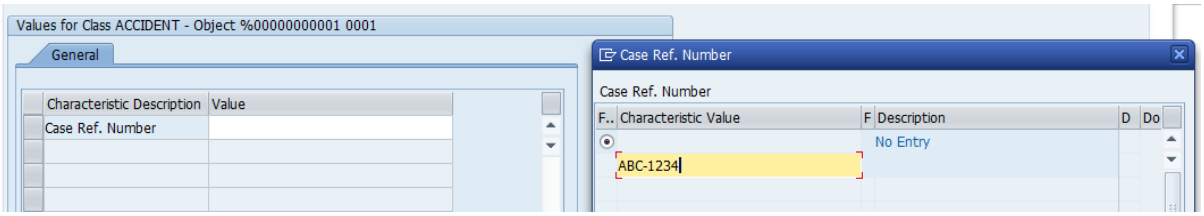
9. In the **Classification** field, use the match code icon and hit enter (with '**Class Type**' as 015) to get the 'Classifications' pop-up window shown on the right-hand side of the screen below.



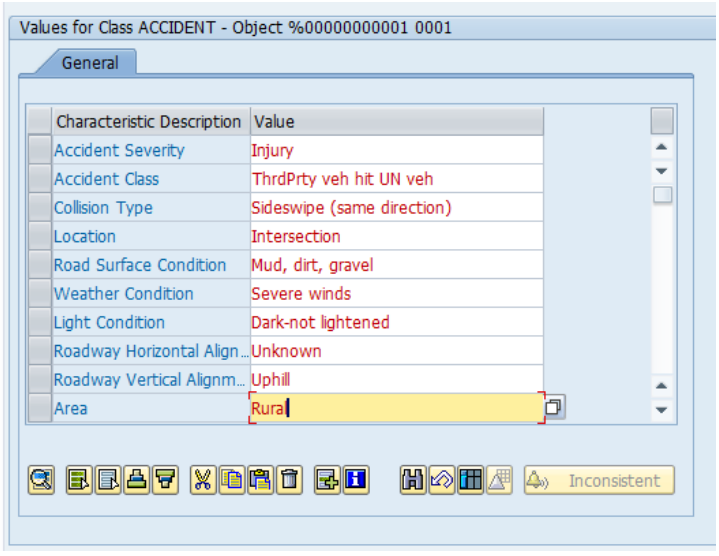
10. Select **ACCIDENT or INCIDENT** and hit enter. The system will display the '**Create Service Notification: Classification**' screen. For each characteristic, select the options from the pre-defined lists. For other characteristics not included in the lists, manually enter a response.



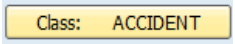
The screen below shows a characteristic that requires a manual entry.



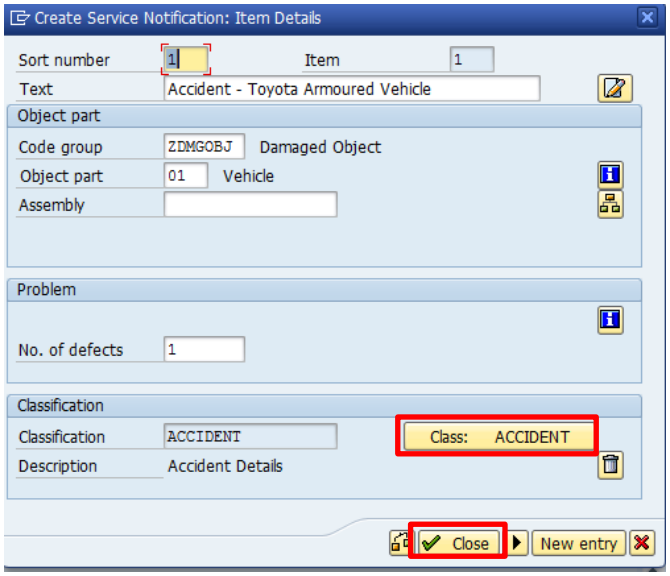
11. The Characteristic Value (i.e. number) is initially displayed in the fields. Once users hit enter, the numbers change to Descriptions.



Scroll down and enter all the details required. Once complete, click the back button. This will redirect users to the screen below.

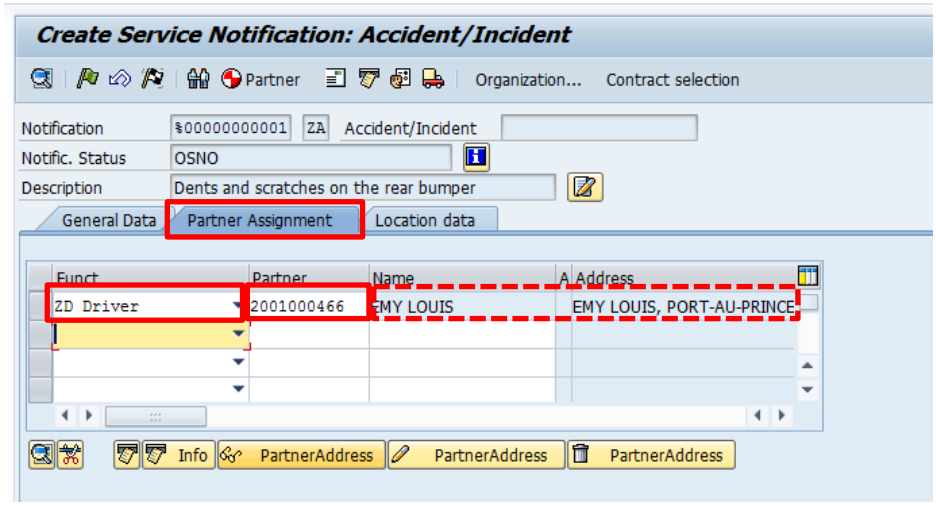
12. To change any Characteristics after they are entered, click on the 

button.

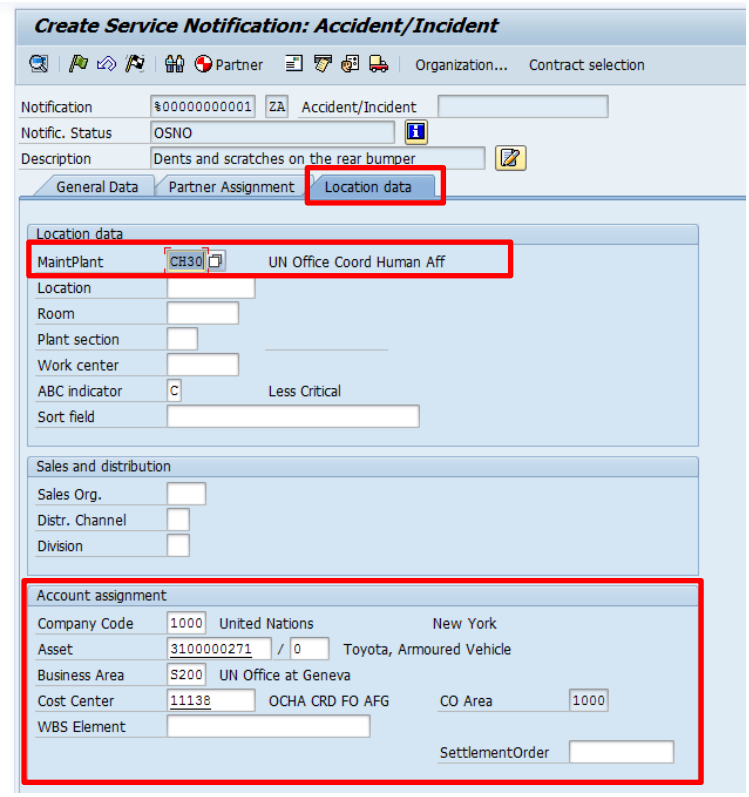


13. After all the characteristics are entered, click Close. This will navigate users back to the '**Create Service Notification: Accident/Incident**' screen.

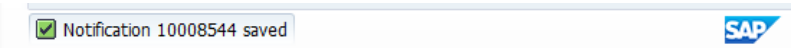
14. On the '**Partner Assignment**' tab, use the drop-down list to select '**ZD-Driver**' as the Partner Function (**Funct**). Use the **Partner** field to select the Business Partner (BP) number of the driver. The Name & Address will populate automatically from the BP Master Record.



15. On the '**Location data**' tab, the Mission (**MaintPlant**) and the Account Assignment will be automatically populated from the Equipment number that was entered at the start of the process. Review these details and ensure the details are correct.

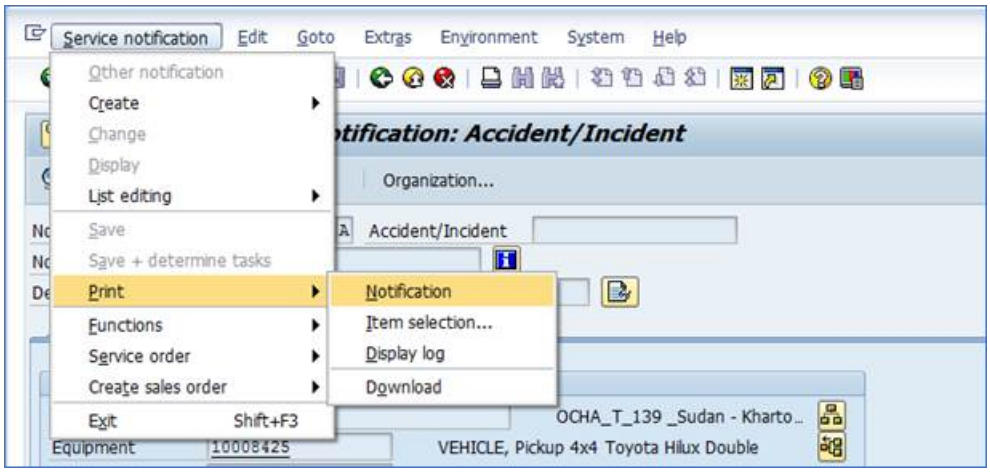


16. , Click on the button to save the Notification. Note down the number generated at the bottom of the screen.

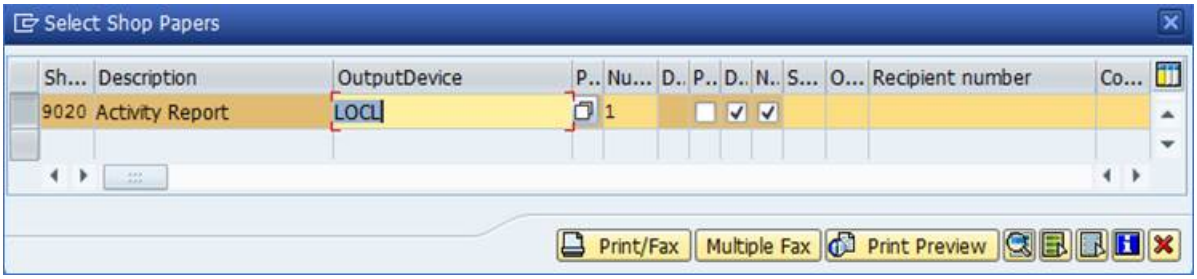


17. Print your document

- Use T-code **IW52** and enter the Notification number.
- Click **Service Notification** → Print → Notification

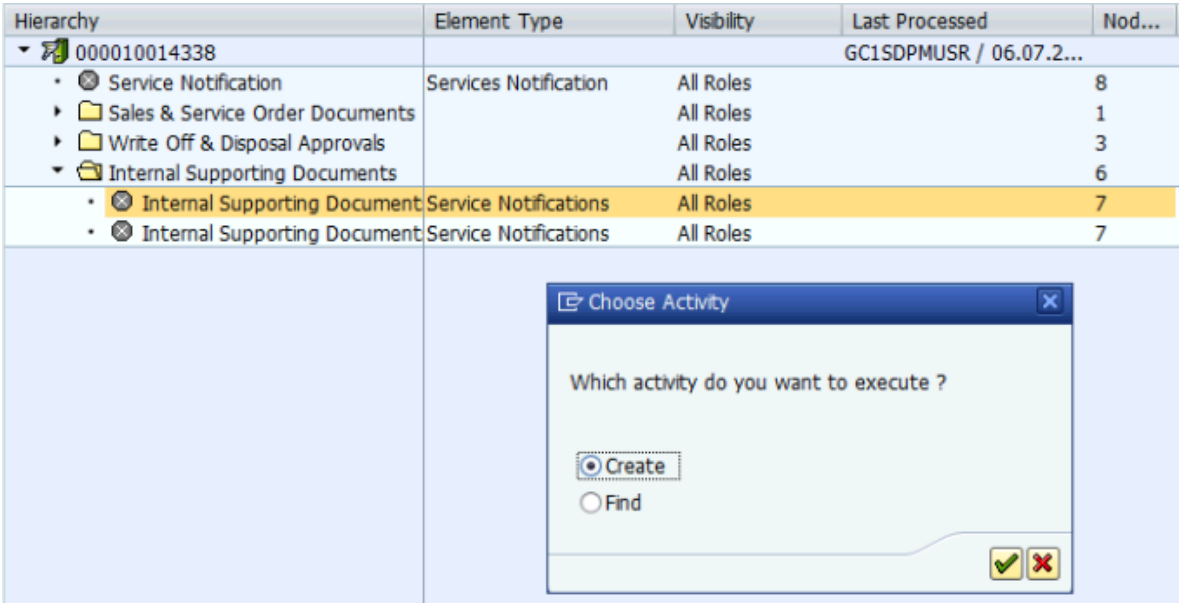


- The **Select Shop Papers** window appears.
- Select the appropriate Shop Paper.
- Check **OutputDevice**.
- Click the **Print/Fax** button.

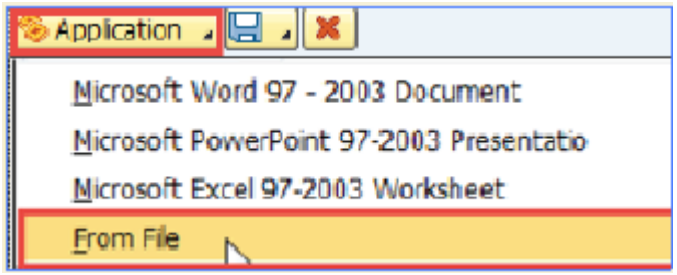


Upload Motor Vehicle Form to the Accident/Incident Notification

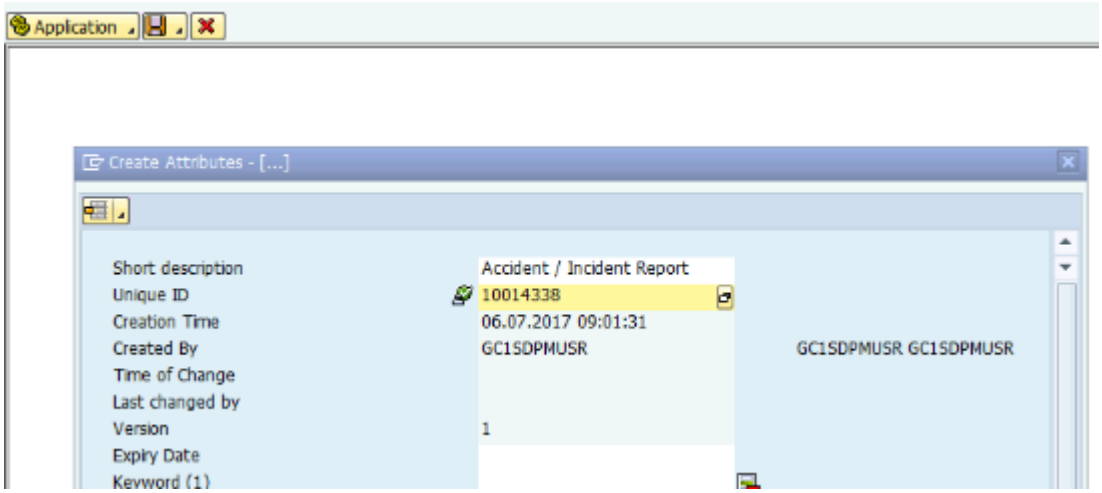
1. Enter T-code **IW52** to modify the Notification.
2. Enter the **Notification ID** recorded and hit enter.
3. The '**Change Service Notification: Accident/Incident**' screen will be displayed with the Notification details.
4. Expand the '**Services for Object**' button (upper left of window) and select **'Records Management Plant Maintenance**.'
5. Highlight the first row in the Hierarchy, and click on the **Display/Change** button.
6. In the hierarchy, highlight and right click **'Internal Supporting Documents'** and select '**Create.**'



7. Click on the green tick in the **'Choose Activity**' pop up to continue.
8. Click on the '**Application**' button and select **'From File**' from the drop-down menu.



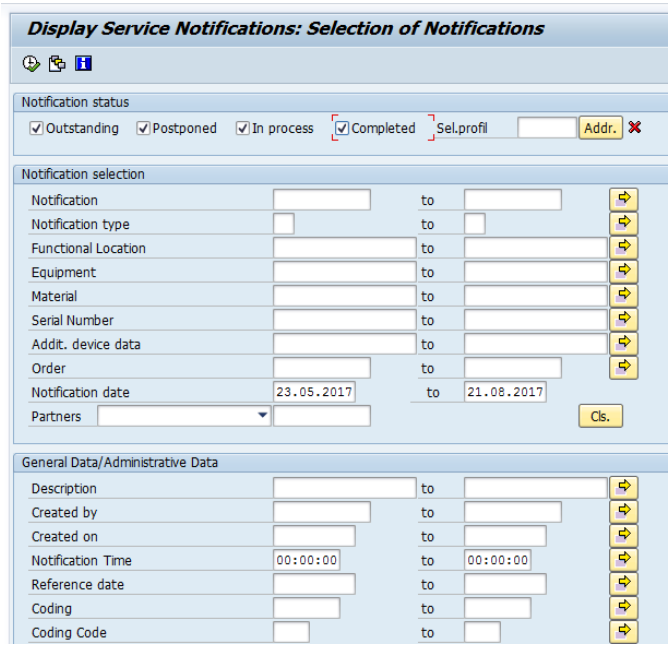
9. Locate and attach your file.
10. In the create attributes pop-up window complete the following:
    - Short Description: Accident/Incident report
    - Unique ID: Use the Notification ID here

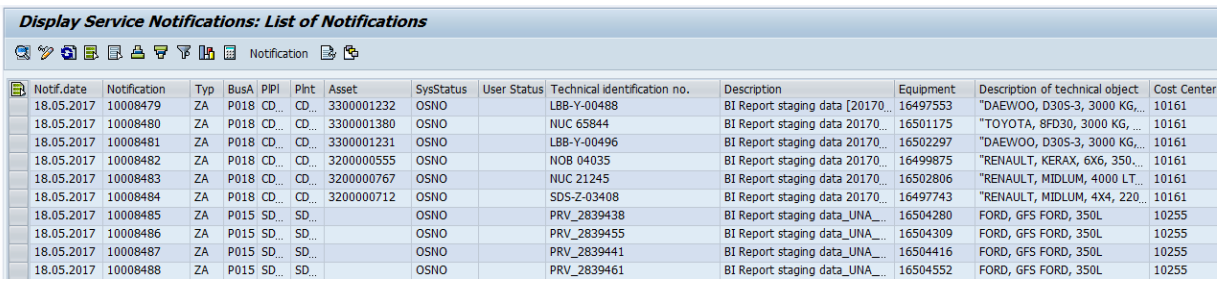


11. Click on the green tick. A portion of the uploaded document should be visible in the right-hand window.
12. Save the document.

List of Accident/Incident Notifications and Reporting

1. Enter T-code **IW59** to display the '**Display Service Notifications: Selection of Notifications**' Screen.
2. Enter parameters to restrict/filter the Notifications from the List.
3. Use the **Notification Type** parameter to retrieve Accident/Incident Notifications. **ZA – Accident/Incident** pulls relevant Notifications for Accidents/Incidents.
4. After the required selection parameters are entered, click the execute button.
5. A list of Notifications appears.





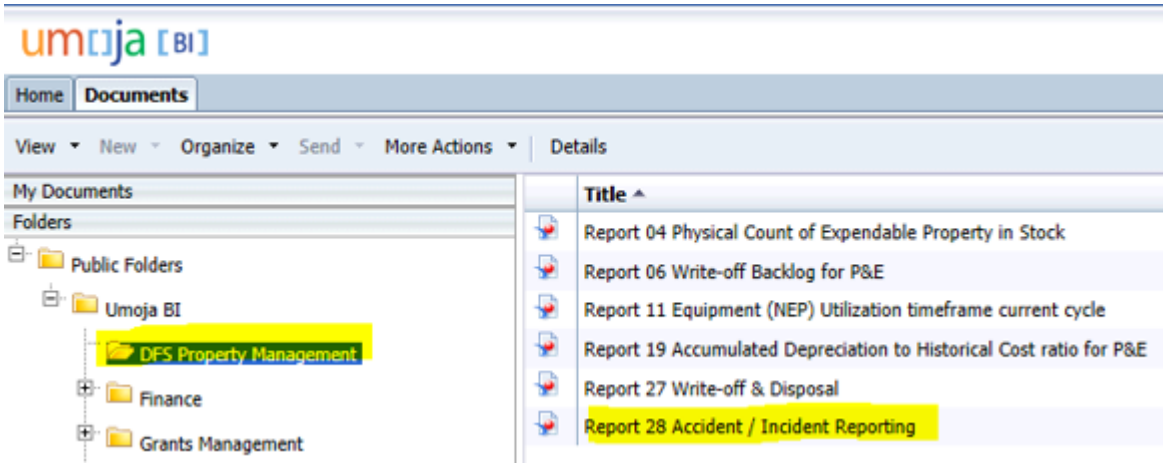
Notif.date	Notification	Typ	BusA	PlPl	Plnt	Asset	SysStatus	User Status	Technical identification no.	Description	Equipment	Description of technical object	Cost Center
18.05.2017	10008479	ZA	P018	CD...	CD...	3300001232	OSNO		LBB-Y-00488	BI Report staging data [20170...	16497553	"DAEWOO, D30S-3, 3000 KG,...	10161
18.05.2017	10008480	ZA	P018	CD...	CD...	3300001380	OSNO		NUC 65844	BI Report staging data 20170...	16501175	"TOYOTA, 8FD30, 3000 KG, ...	10161
18.05.2017	10008481	ZA	P018	CD...	CD...	3300001231	OSNO		LBB-Y-00496	BI Report staging data 20170...	16502297	"DAEWOO, D30S-3, 3000 KG,...	10161
18.05.2017	10008482	ZA	P018	CD...	CD...	3200000555	OSNO		NOB 04035	BI Report staging data 20170...	16499875	"RENAULT, KERAX, 6X6, 350,...	10161
18.05.2017	10008483	ZA	P018	CD...	CD...	3200000767	OSNO		NUC 21245	BI Report staging data 20170...	16502806	"RENAULT, MIDLUM, 4000 LT...	10161
18.05.2017	10008484	ZA	P018	CD...	CD...	3200000712	OSNO		SDS-Z-03408	BI Report staging data 20170...	16497743	"RENAULT, MIDLUM, 4X4, 220...	10161
18.05.2017	10008485	ZA	P015	SD...	SD...		OSNO		PRV_2839438	BI Report staging data_UNA_...	16504280	FORD, GFS FORD, 350L	10255
18.05.2017	10008486	ZA	P015	SD...	SD...		OSNO		PRV_2839455	BI Report staging data_UNA_...	16504309	FORD, GFS FORD, 350L	10255
18.05.2017	10008487	ZA	P015	SD...	SD...		OSNO		PRV_2839441	BI Report staging data_UNA_...	16504416	FORD, GFS FORD, 350L	10255
18.05.2017	10008488	ZA	P015	SD...	SD...		OSNO		PRV_2839461	BI Report staging data_UNA_...	16504552	FORD, GFS FORD, 350L	10255

- It is possible to drill-down into the individual Notification by clicking on the Notification number. Use T-code IW53 '**Display Service Notification: Accident/Incident**' to show the Notification.
- The standard sort, filter, total & sub-total are also available in this report.

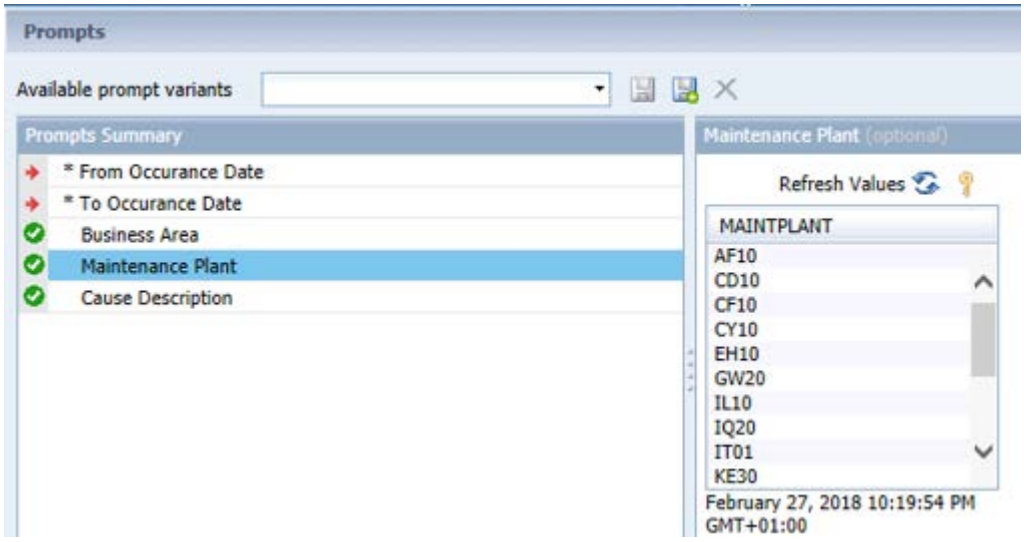
Run BI Accident-Incident Reports

1. Log in to **Umoja → Umoja Production**
2. Go to the BI Portal

3. Go to **Public Folders → DFS Property Management**
4. Find/filter the relevant report by Title or Creation Date



5. Double click on the report title. A prompt box appears with mandatory date range 'From' and 'To' filters. (There is an optional filter for Maintenance Plant).



6. Enter in the date of the accident or incident.

7. Save and/or export the report to Excel.