TM LPE-T WORKSHOP

Transportation Planning and Management and Track & Trace (TPTM – T&T project)

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Tuesday, October 22, 2019

DEPARTMENT OF OPERATIONAL SUPPORT

TRANSPORTATION MANAGEMENT ENTERPRISE ROLES

UNOE

TS.01 TM TRANSPORTATION PLANNER

TS.02 TM MANAGE FREIGHT ORDER

TS.03 TM DISPLAY ALL

INTER & INTRA Mission Transfers

TS.07 TM STO TRANSPORTATION PLANNER

TS.08 TM STO FREIGHT PROCUREMENT

TS.09 TM STO DISPLAY ALL

TS.04 TM MASTER DATA MAINTAINER

TS.05 COLLABORATION PORTAL

TS.06 TM EM PRODUCTION SUPPORT

DEPARTMENT OF OPERATIONAL SUPPORT

TRANSPORTATION MANAGEMENT ENTERPRISE ROLES

TS.01 TM TRANSPORTATION PLANNER

Transportation Planner for UNOE is responsible for planning the movement of goods purchased and delivered by vendors (e.g. under Incoterms such as EXW, FCA, etc. for virtual delivery) from the delivery location to the destination.

- Display / Query DTR (UNOE). Change / Display / Query Freight Unit (FU). Plan / Change / Display / Query Freight Orders (FO)
- Allows the user to estimate the charges, download and print preview the statement of work (SOW)
- Allows the user to submit expected and unexpected events against the freight order in TM system.

TS.02 TM MANAGE FREIGHT ORDER

Manage Freight Order role in Transportation Management (TM) enables the user to display, amend, update and enter events in a Freight Order The TM Manage Freight Order (TS.02) role provides access to the below functions:

- Display / Query **DTR**. Change / Display / Query **Freight Orders**. Change / Display / Query **Freight Units**

TS.03 TM DISPLAY ALL

The TS.03 TM Display All provides display and query functions only. In Umoja, the TM Display All Enterprise role in TM provides access to the below Functions:

- Display / Query DTR. Display / Query **Freight Unit**: Display / Query **Freight Orders**: Display events against the freight order:

DEPARTMENT OF OPERATIONAL SUPPORT

TRANSPORTATION MANAGEMENT ENTERPRISE ROLES

TS.07 TM STO TRANSPORTATION PLANNER

The TS.07 STO Transportation Planner enterprise role in Transportation Management (TM) enables the user to plan, organize and optimize the movement of freight and personnel to be undertaken by freight forwarders, third party logistics providers, or other resources contracted by the UN in execution of a Stock Transportation Order (STO). The STO may be for movements inter-mission i.e. between different missions or for intra-mission movements between different locations.

Display / Query Delivery-based Transportation Requirement-DTR. Create / Change / Display / Query Forwarding Order-FWO (COE/Troops). Change / Display / Query Freight Unit (FU). / Change / Display / Query Freight Orders (FO). Submit events against the freight order

TS.08 TM STO FREIGHT PROCUREMENT The TS.08 TM STO Freight Procurement enterprise role in Transportation Management (TM) enables the user to display, amend, update and enter events in a Freight Order for a STO freight movement undertaken by freight forwarders, third party logistics providers, or other resources contracted by the UN.

Display / Query DTR. Change / Display / Query Freight Orders. Change / Display / Query Freight Units. Submit events against the freight order

TS.09 TM STO DISPLAY ALL

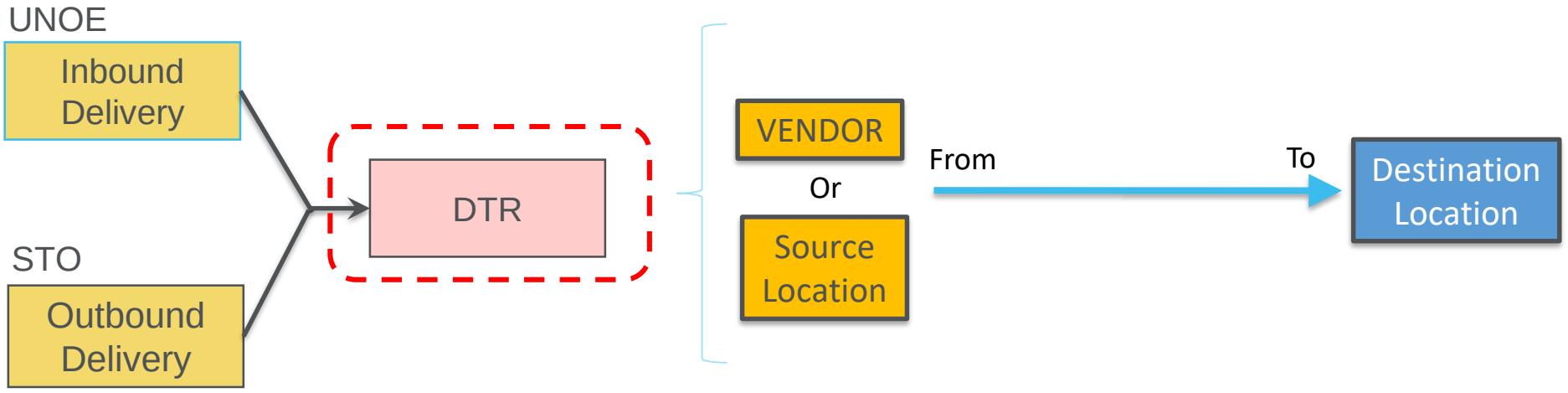
The TS.09 TM STO Display All provides display and query functions only. In Umoja, the Transportation Management STO Display Enterprise role in TM provides access to the following Functions: Query OBD. Display / Query DTR for Inter and/or Intra-mission movements. Display / Query Forwarding Order (COE/Troops). Display / Query Freight Unit. Display / Query Freight Orders. Display events against the freight order

DTR – DELIVERY BASED TRANSPORTATION REQUIREMENT

Once the **Inbound/Outbound Delivery** is created in ECC, the system automatically generates the following document in TM: a **Delivery-based Transportation Requirement** (DTR)

With the current system configuration, there is a "**1 to 1 relationship**" between INB & OBD with DTR :
1 Inbound/Outbound Delivery – 1 Delivery-based Transportation Requirement

The **Delivery-based Transportation Requirement** (DTR) document represents a transportation demand based on a delivery.

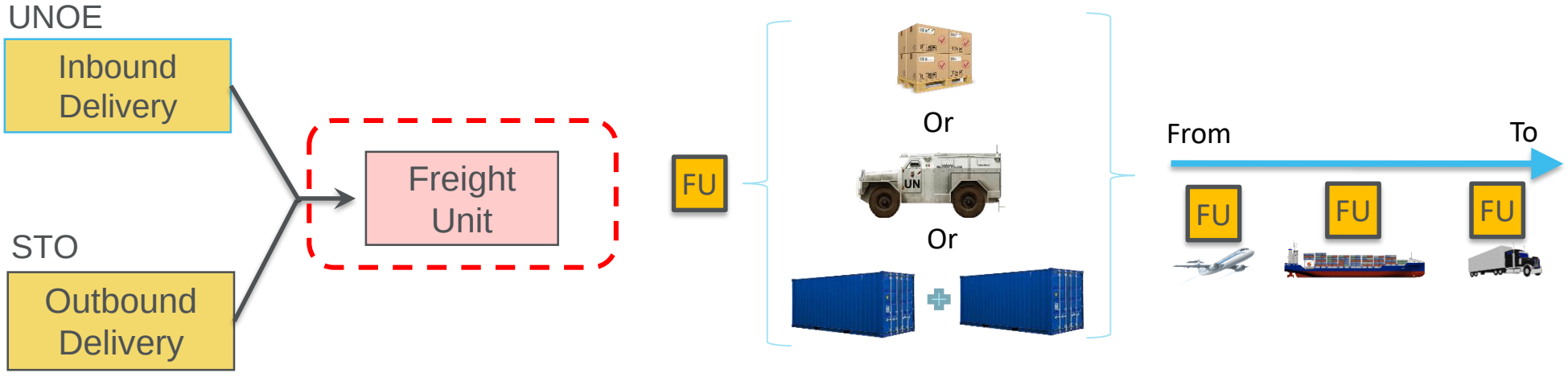


FU – FREIGHT UNIT DOCUMENT

Once the **Inbound Delivery** & **Outbound Delivery** documents are created in ECC, the system automatically creates the following documents in TM: a **Freight Unit** (FU).

With the current system configuration, there is a "**1 to 1 relationship**" between INB & OBD with DTR & FU: 1 Inbound/Outbound Delivery – 1 Freight Unit.

A **Freight Unit** (FU) represent a set of goods that are transported together across the entire transportation chain



TM – TRASNPORTATION COCKPIT – MANAGING FREIGHT UNITS

Freight Unit

The **Transportation Cockpit** allows TS.01 & TS.07 to Manage Transportation for Freight Units and generate Transportation Proposals

Transportation Cockpit:

Freight Unit Stages (25)

Split/Merge | Stages | Create Capacity Document | Create Multiple Capacity Documents | Remove Capacity Document

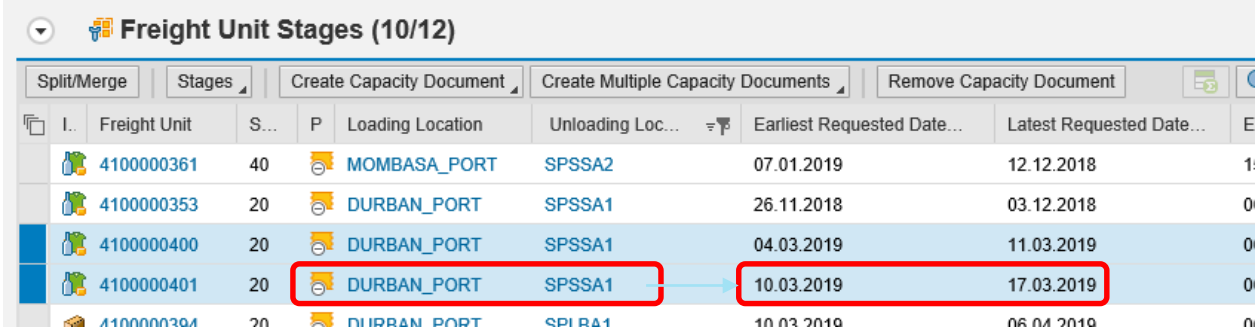
Search for:

Original...	I..	Freight Unit	S	P	Loading...	Unloadin...	Earliest...	Ear...	T..	Latest...	Lat...	T..	Gros...	G...
80004127		4100001325	1..		SPITA2	BRINDISI...		00:0...	C...	06.10.2019	23:5...	C...	8	KG
80004127		4100001325	2..		BRINDI...	SPSOC3	29.09.2019	00:0...	C...	07.10.2019	23:5...	U...	8	KG
80004105		4100001323	1..		SPITA2	BRINDISI...		00:0...	C...	06.10.2019	23:5...	C...	6	KG
80004105		4100001323	2..		BRINDI...	SPAFB2	29.09.2019	00:0...	C...	07.10.2019	23:5...	A...	6	KG
80004121		4100001317	1..		SPITA2	BRINDISI...		00:0...	C...	06.10.2019	23:5...	C...	8	KG
80004121		4100001317	2..		BRINDI...	SPSOC3	29.09.2019	00:0...	C...	07.10.2019	23:5...	U...	8	KG
80004106		4100001302	1..		SPITA2	BRINDISI...		00:0...	C...	06.10.2019	23:5...	C...	3	KG
80004106		4100001302	2..		BRINDI...	SPAFB2	29.09.2019	00:0...	C...	07.10.2019	23:5...	A...	3	KG
80004104		4100001300	1..		SPITA2	BRINDISI...		00:0...	C...	06.10.2019	23:5...	C...	3	KG
80004104		4100001300	2..		BRINDI...	SPAFB2	29.09.2019	00:0...	C...	07.10.2019	23:5...	A...	3	KG
80004103		4100001295	1..		SPITA2	BRINDISI...		00:0...	C...	27.09.2019	23:5...	C...	1	KG
80004103		4100001295	2..		BRINDI...	SPAFB2	19.09.2019	00:0...	C...	27.09.2019	23:5...	A...	1	KG
80004081		4100001270	1..		SPITA2	BRINDISI...		00:0...	C...	06.10.2019	23:5...	C...	141	KG
80004081		4100001270	2..		BRINDI...	SPAFB2	29.09.2019	00:0...	C...	07.10.2019	23:5...	A...	141	KG

TM– Transportation Cockpit – SINGLE PROPOSAL

Freight Unit

GENERATE SINGLE PROPOSAL

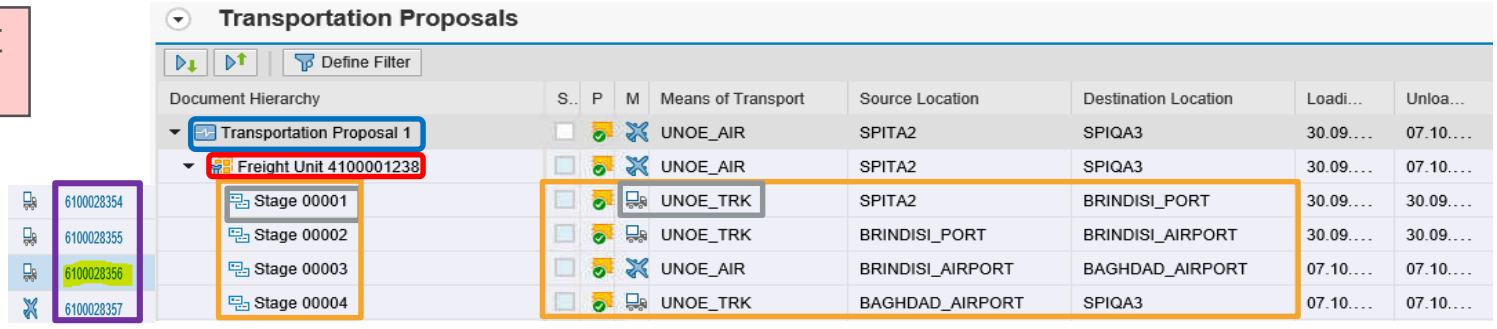


The transportation planning for a single Freight Unit is the simplest way of planning transportation. Selecting a single FU will have Umoja generate Transportation Proposals with Stages/Lanes for the specific Route found between Loading Location and Unloading Location.

TM– PLANNING PHASE – Routes, Lanes, Stages, FOs

Freight Order

Freight Unit



Freight Order/s:
FOs are the Documents in TM that numerically identify each Leg/Stage planned after accepting a Route or a Transportation Proposal in the TM Cockpit

Transportation Proposals are organized in the following way:

Transportation Proposal Number:
- Identifies one of the proposals generated by TM

Freight Unit Number:
- Identifies the Freight Unit being planned

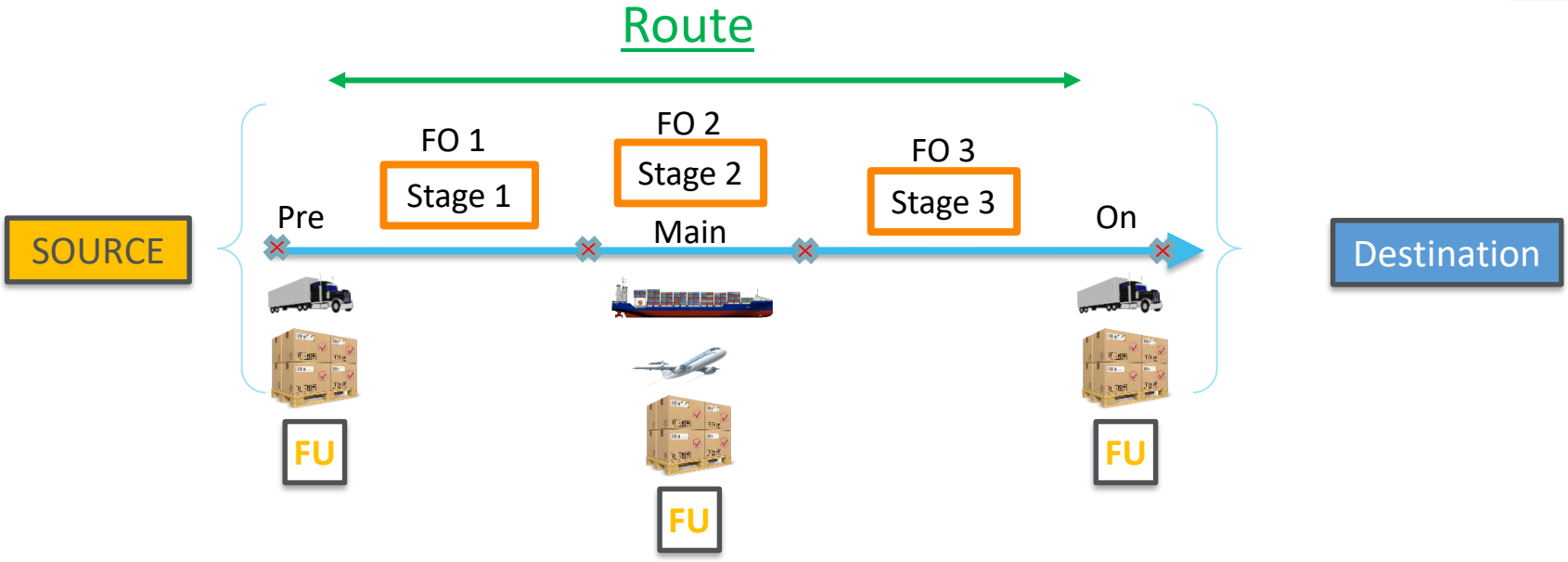
Stages/Lanes + Means of Transport:
- Identifies the number of "connections" between Source and Destination as well as the Means of Transport associated to each connection

Route:
- A route is the combination of Legs/Stages connecting Source & Destination Location
- It is the complete transportation proposal resulting from planning a Freight Unit

TM– PLANNING PHASE – Routes, Lanes, Stages, FOs

Freight Order

Freight Unit

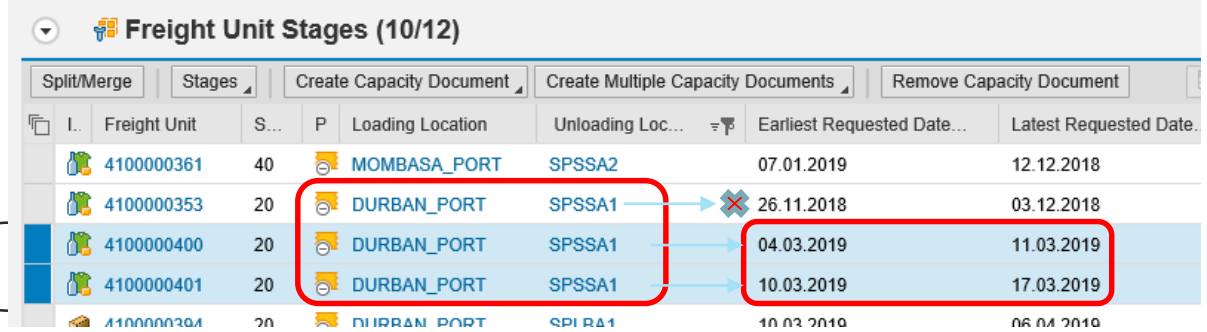


TM– PLANNING PHASE – COMBINED PROPOSAL

Freight Unit

GENERATE COMBINED PROPOSAL

FUs can be consolidated for transportation purposes



To manage the transportation planning for multiple Freight Units at once, Multiple FUs can be combined into one transportation proposal in order to plan transportation for FUs destined to the same Unloading Location.

Selecting multiple FUs will have Umoja generate Transportation Proposals with Stages/Lanes for the specific Routes found between various Loading and Unloading Locations. This format of planning transportation, has restrictions.

Consolidation Pre-Requisites:

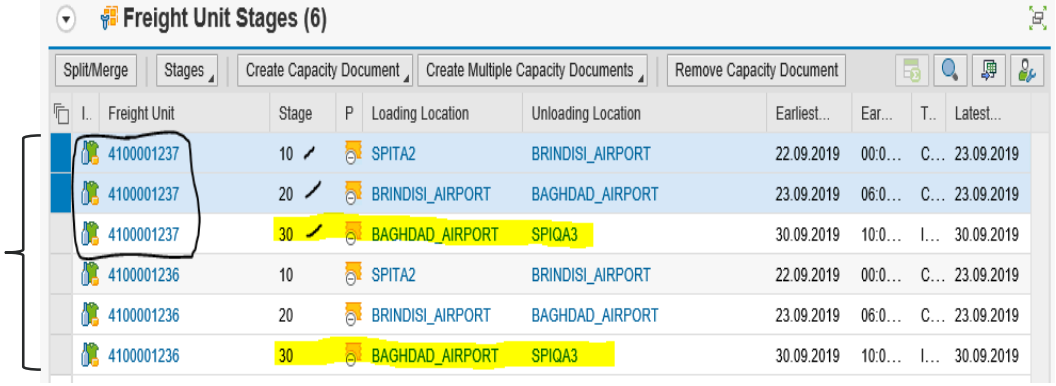
A. Based on Dates = Not more than 7 days apart
B. At least one common leg

TM– PLANNING PHASE – COMBINE FU ROUTES

Freight Unit

SPLIT GENERATED PROPOSAL INTO STAGES

Several Freight Units can be selected in order to combine the Stages/Legs generated in the Transportation Proposal efficiently



I..	Freight Unit	Stage	P	Loading Location	Unloading Location	Earliest...	Ear...	T..	Latest...
	4100001237	10		SPITA2	BRINDISI_AIRPORT	22.09.2019	00:0...	C...	23.09.2019
	4100001237	20		BRINDISI_AIRPORT	BAGHDAD_AIRPORT	23.09.2019	06:0...	C...	23.09.2019
	4100001237	30		BAGHDAD_AIRPORT	SPIQA3	30.09.2019	10:0...	I...	30.09.2019
	4100001236	10		SPITA2	BRINDISI_AIRPORT	22.09.2019	00:0...	C...	23.09.2019
	4100001236	20		BRINDISI_AIRPORT	BAGHDAD_AIRPORT	23.09.2019	06:0...	C...	23.09.2019
	4100001236	30		BAGHDAD_AIRPORT	SPIQA3	30.09.2019	10:0...	I...	30.09.2019

Goods being transported from A to B or C to D can share the same Lanes/Stages and thus be transported together
To do this Accept Routes in order to more efficiently manage transportation by combining Legs/Stages.

This format of planning transportation, has its restrictions.

Consolidation Pre-Requisites:

A. Based on Dates = Not more than 7 days apart

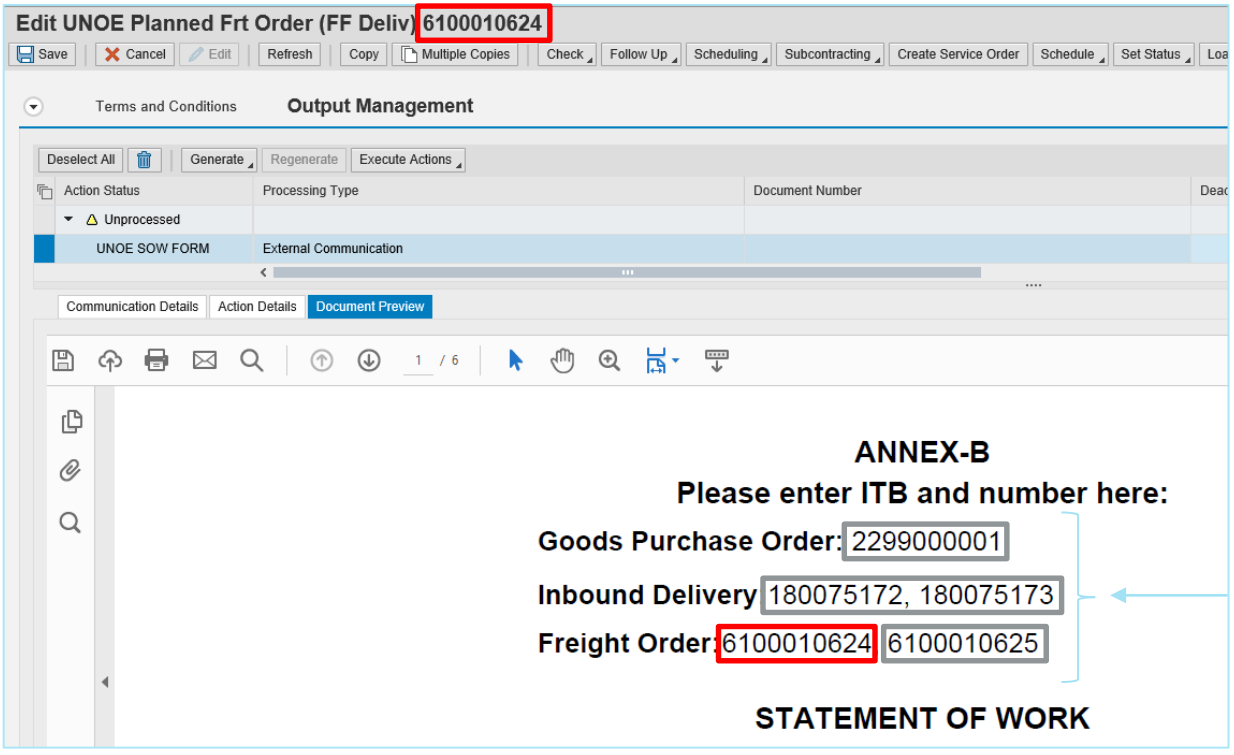
SOW – STATEMENT OF WORK

SOW

Freight Order

A "**Statement Of Work**" document (SOW) can be downloaded from each Freight Order. The SOW serves as an input for the Freight Procurement phase.

- The **SOW** includes all the Freight Orders, Inbounds, Outbounds, Purchase Orders, and Stock Transport Orders related to the same Shipment.



** Specific templates are available for UNOE, STO.*

All linked documents are displayed in the SOW's Header.

CCP – EVENT MANAGEMENT (CARRIERS)

CCP

TS.05 **Update Events**

TS.05 **Upload Attachments/ Add Notes**

C C P

CCP is the Carrier Collaboration Portal Carriers will manage the Freight Orders they are responsible for. They will be able to submit events, add notes and upload attachments:

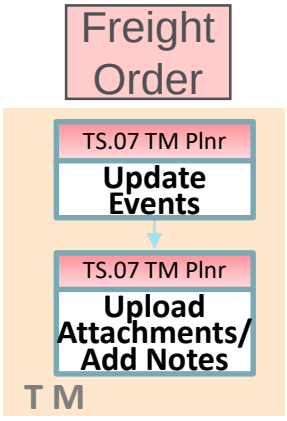
- ✓ Examples of **Events**:
  - ✓ **Planned**: Loading Start/End, Departure, Arrival, etc.
  - ✓ **Unexpected**: Delay, Damage, etc.
- ✓ Examples of **Attachments**: Packing List, Bill of Lading, Proof of Delivery, etc.
- ✓ Examples of **Notes**: Loading Successful

All Events/Attachments/Notes submitted via CCP are displayed in TM.

UNOE

*Incoterm is a commercial agreement in UNOE Scenarios

TM – EVENT MANAGEMENT (TS.01 / TS.07)



The TS.01 & TS.07 submit Expected and Unexpected Events in TM, Adding Corresponding notes and attachments related to the events submitted.

FCA/FOB/DAT, EXW incoterms for UNOE Scenarios

Determine what Freight Orders are managed by Vendors, Freight Forwarders in CCP or Receiving Plant in TM

FCA/EXW/DAP incoterms for INTER Mission Transfers

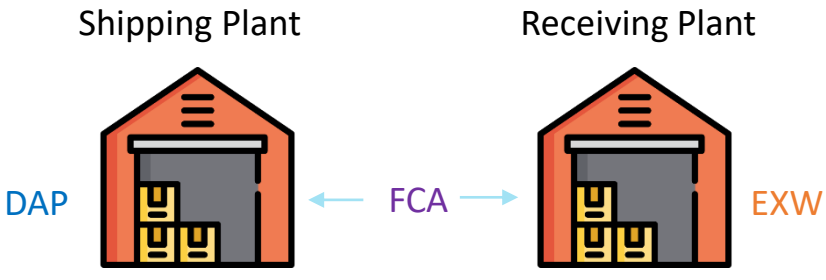
Determine if Receiving Plant and/or Shipping Plant Manage Events and for which Freight Orders

DAP incoterm for INTRA Mission Transfers

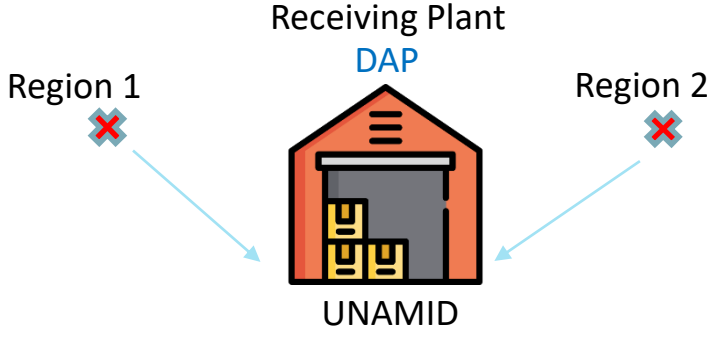
For this case it is always the Receiving Plant that manages Freight Orders

INTER Mission Transfer

*Incoterm is not a commercial agreement; it indicates which plant will Manage FUs and FOs



INTRA Mission Transfer



ADVANCED PLANNING

Transportation Planning and Management and Track & Trace (TPTM – T&T project)

David Redondo

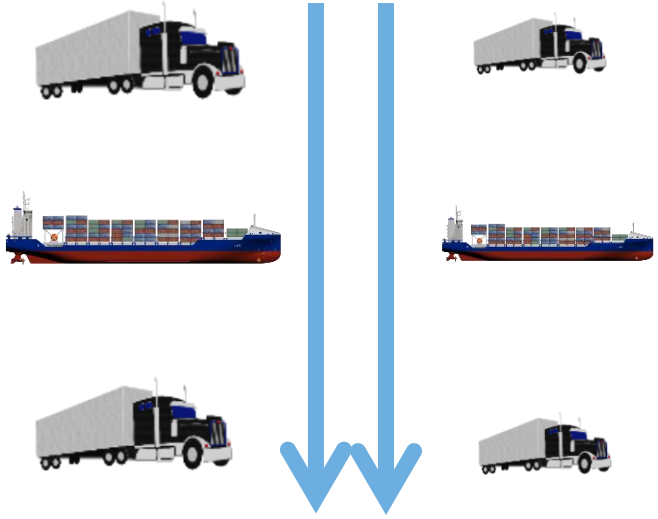
UCS Training Team

Tuesday, October 22, 2019

Generate combined proposal - EXAMPLES

SAME ORIGIN - SAME DESTINATION

New York Port



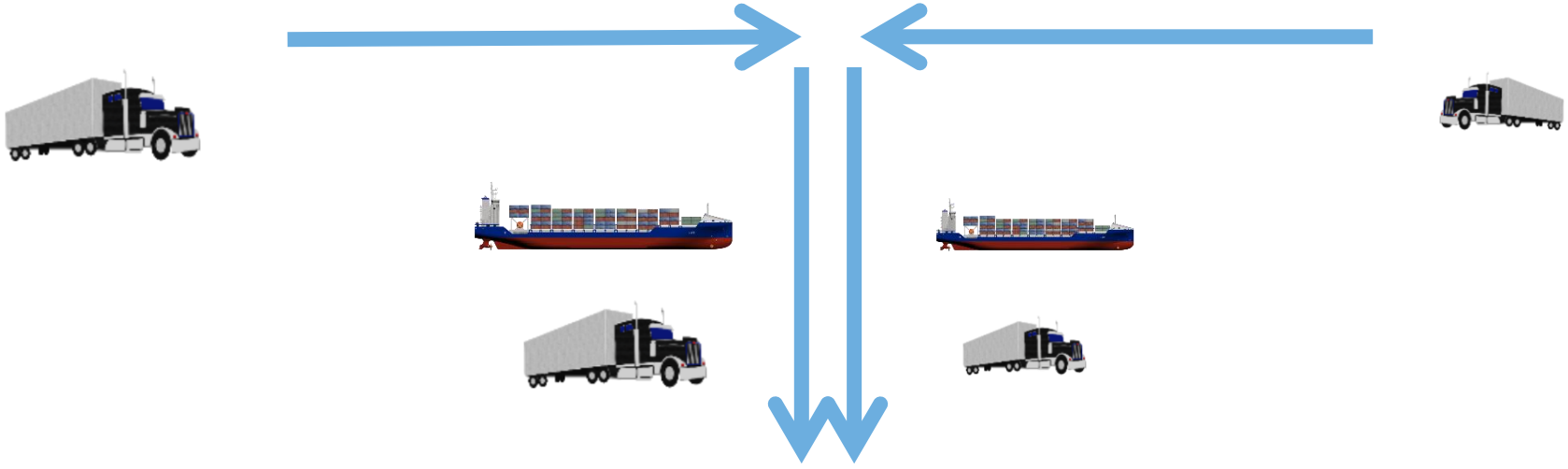
RSCE
Entebbe

TM– PLANNING PHASE - EXAMPLES

DISTINCT ORIGIN - SAME DESTINATION

UNICTF Valencia

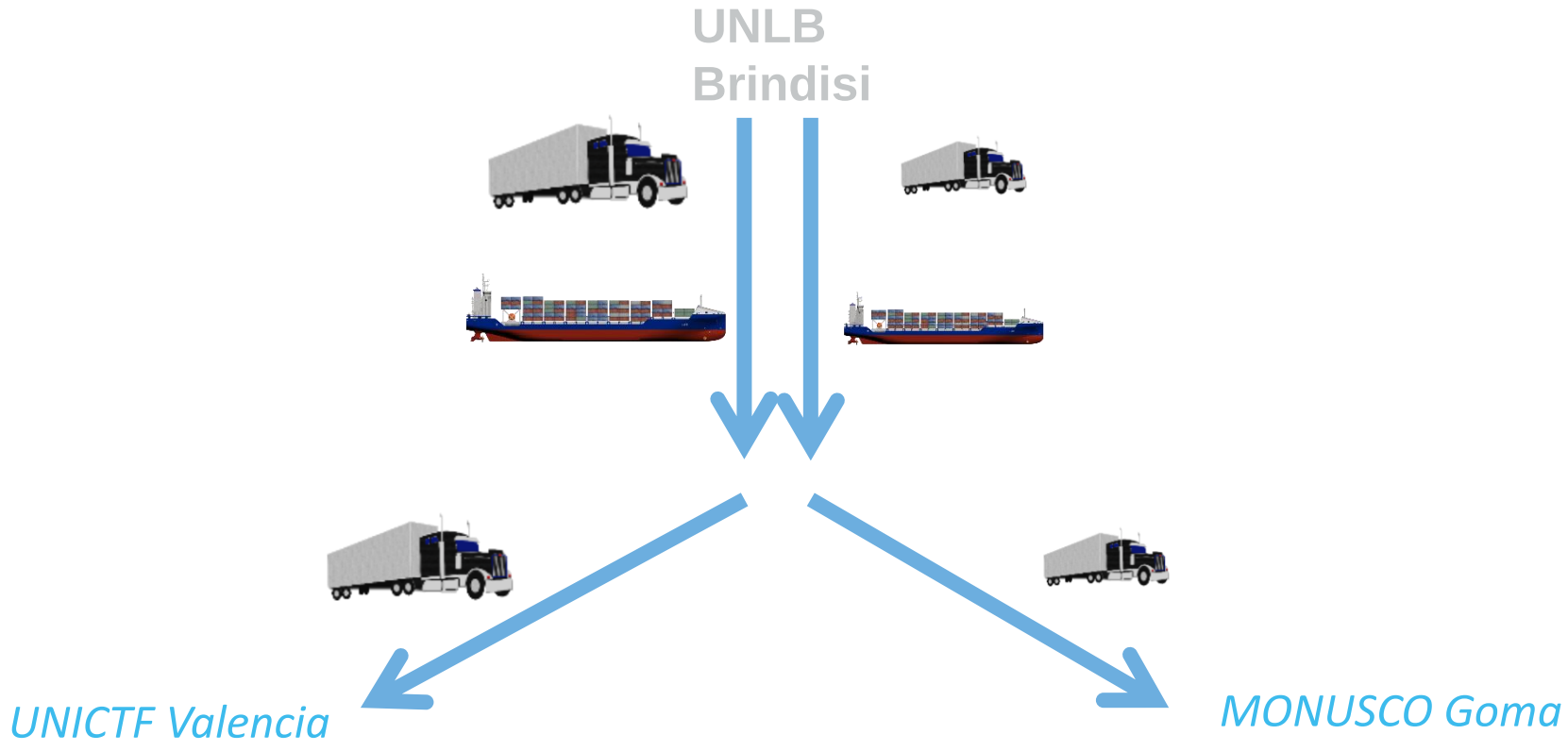
UNLB Brindisi



RSCE
Entebbe

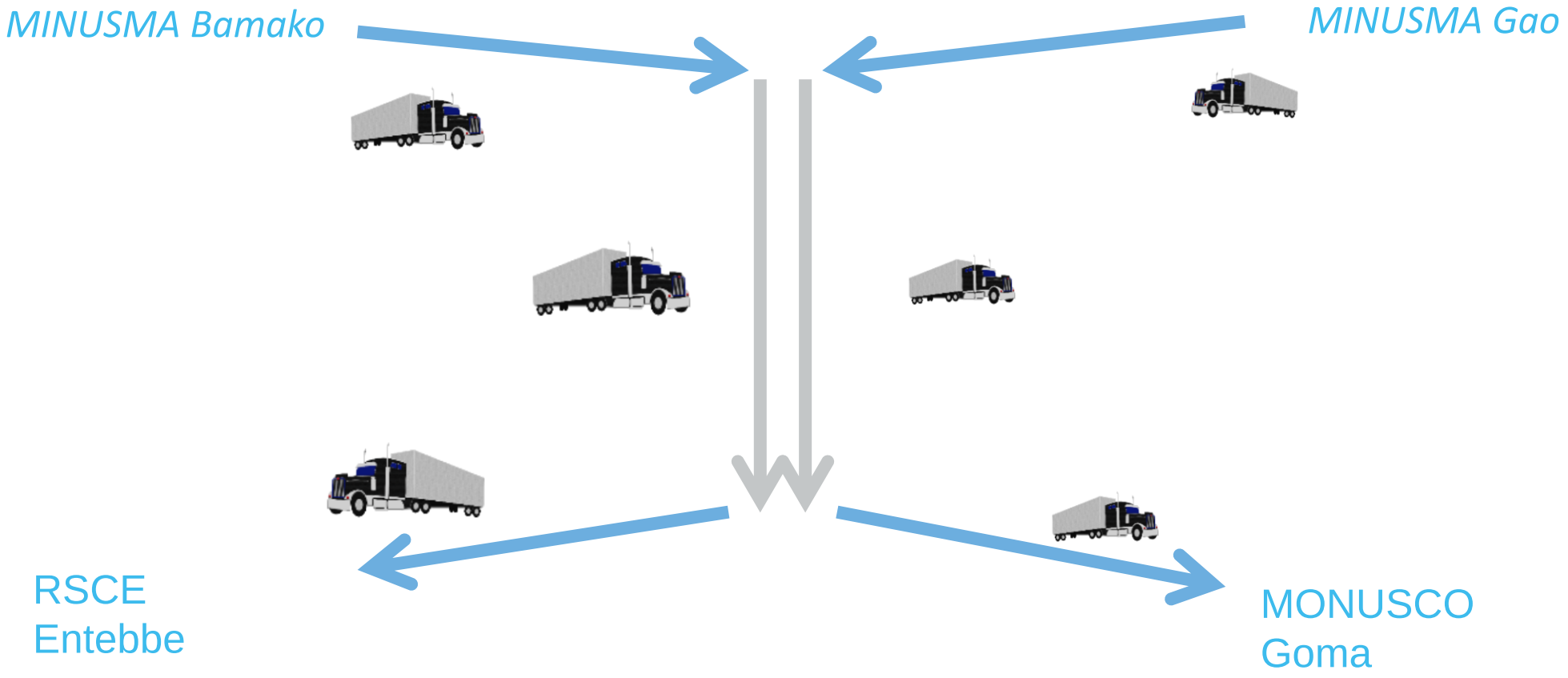
TM– PLANNING PHASE – Generate combined proposal

SAME ORIGIN - DISTINCT DESTINATION



TM– PLANNING PHASE - EXAMPLES

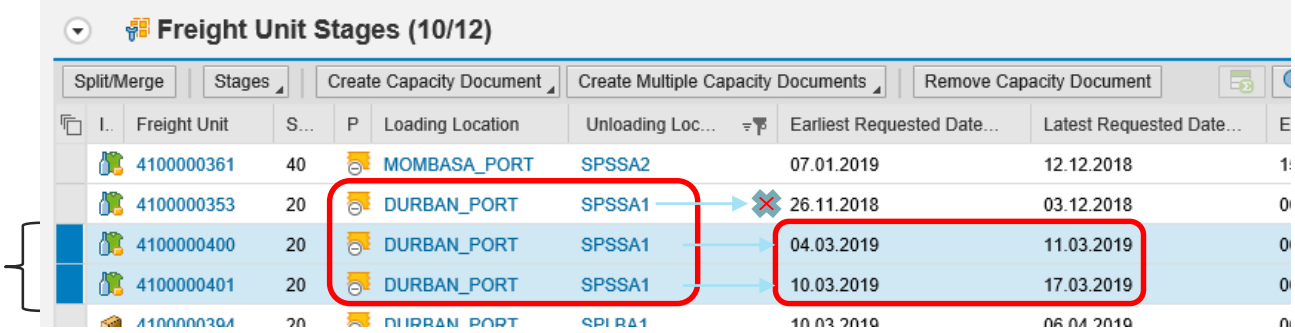
DISTINCT ORIGIN, DISTINCT DESTINATION – SIMILAR STAGES



TM– PLANNING PHASE – CONSOLIDATE MULTIPLE FUs

CONSOLIDATE MULTIPLE FUs

FUs can be consolidated for transportation purposes



To manage the transportation planning for multiple Freight Units at once, Multiple FUs can be combined into one transportation proposal in order to plan transportation for FUs destined to the same Unloading Location.

Selecting multiple FUs will have Umoja generate Transportation Proposals with Stages/Lane for the specific routes found between various Loading Locations and a single Unloading Location. This format of planning transportation, has restrictions.

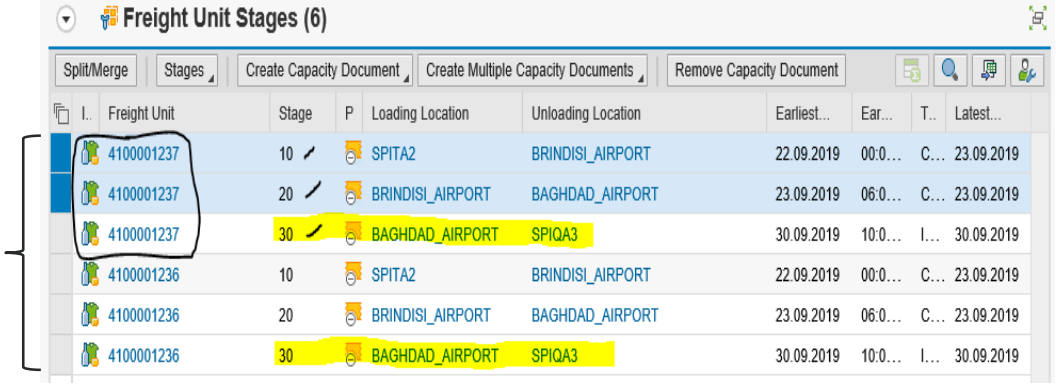
Consolidation Pre-Requisites:

A. Based on Dates = Not more than 7 days apart

TM– PLANNING PHASE – COMBINE FU ROUTES

COMBINE FU ROUTES

Multiple FUs can be consolidated for Route Efficiency



I..	Freight Unit	Stage	P	Loading Location	Unloading Location	Earliest...	Ear...	T..	Latest...
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	4100001237	20		BRINDISI_AIRPORT	BAGHDAD_AIRPORT	23.09.2019	06:0...	C...	23.09.2019
	4100001237	30		BAGHDAD_AIRPORT	SPIQA3	30.09.2019	10:0...	I...	30.09.2019
	4100001236	10		SPITA2	BRINDISI_AIRPORT	22.09.2019	00:0...	C...	23.09.2019
	4100001236	20		BRINDISI_AIRPORT	BAGHDAD_AIRPORT	23.09.2019	06:0...	C...	23.09.2019
	4100001236	30		BAGHDAD_AIRPORT	SPIQA3	30.09.2019	10:0...	I...	30.09.2019

Several Freight Units can be selected regardless of Unloading Location in order to combine Routes efficiently.
Goods being transported from A to B or C to D can share the same Lanes/Stages and thus be transported together by combining routes in order to more efficiently manage transportation. This format of planning transportation, has its restrictions.

Consolidation Pre-Requisites:

A. Based on Dates = Not more than 7 days apart

UNOE END TO END

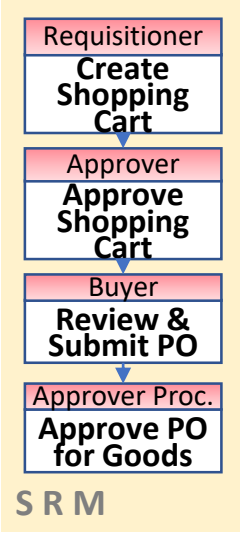
Transportation Planning and Management and Track & Trace (TPTM – T&T project)

Elena Carrasco

UCS Training Team

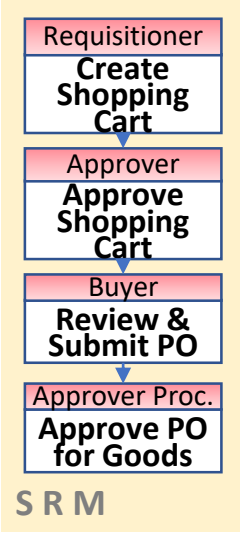
Tuesday, October 22, 2019

UNOE – PROCURE PHASE – SHOPPING CART & PURCHASE ORDER



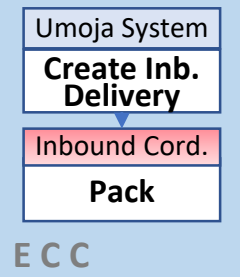
- [Shopping Cart]: Contract Catalog will be used as preferred option. If so, same PID will be offered with different Incoterms (hence, different prices).
- [Shopping Cart]: Incoterm terms from contract catalog are not picked up in the Shopping Cart line. If populated, it needs to be inserted manually. Incoterm key shall be selected by using Matchbox. Location is free text
- [Shopping Cart]: Purchasing Group (SRM) will default the Planner Group (TM) that will have visibility on the DTR to be planned. Purchasing group and planner group are plant based.
- [Shopping Cart}: For goods, no freight line should be created. Freight Shopping Cart and Purchase Order will be created separately.
- [Shopping Cart]: PO Delivery Address/ Performance Location (SRM) becomes Destination Location in the Freight Unit (TM). Umoja TM will calculate the last leg according to the destination set as PO Delivery Address/ Performance Location
- Selecting the Supplier in SRM will allow the Supplier to submit the related transportation events in the Carrier Collaboration Portal (CCP)

UNOE – PROCURE PHASE – SHOPPING CART & PURCHASE ORDER



- [Purchase Order}: Buyers shall ensure the correctness of the following fields: Location, Ship- To- Address-, Purchasing Group, delivery date
- [Purchase Order}: Incoterm/ Key Location at header and item level may not be picked correctly; both incoterm key and location shall be selected by using the matchbox.
- [Purchase Order}: Selecting the Supplier in SRM will allow the Supplier to submit the related transportation events in the Carrier Collaboration Portal (CCP)
- [Purchase Order} The Delivery Date serves as the baseline date for the new Umoja Transportation Module to estimate all the other related dates (departure date, handover date, arrival at destination date, etc.) based on the UN Transportation Network Master Data
- Certifying Officers and Procurement Officers must review the accuracy of data.

UNOE – PROCURE PHASE – INBOUND DELIVERY



- Inbound Delivery is created via batch job in **ECC** and can also be manually created.
- Product **weight** & **volume** is not maintained in the material master. Inbound coordinator shall update weight and volume in the inbound delivery document manually, based on supplier's packing list.
- Several **Packaging materials** *(material type "ZPAM")* are available in the system
- **Packaging materials** and packing shall be manually inserted in the inbound delivery document as per vendor packing list.
- Weight, volume and packaging information duly updated in the "Inbound Delivery" will reflect the correct dimensions of the materials being shipped by creating "**Handling Units**".
- **Batch managed** materials (e.g. vaccines and medical, rations, ammunition) are around 1100PIDs. They need to be assigned in batches by editing the Inbound Delivery document, prior to packing.
- At the moment vendors are onboarded on **EDI**, the packing details will come automatically with the Advanced Shipping Notice (**ASN**).

UNOE – PROCURE PHASE – DTR & FREIGHT UNIT

Umoja System
Create DTR
Umoja System
Create Freight Unit
T M

- Once the **Inbound Delivery** (IBD) is created in ECC, the system automatically creates the following documents in TM: a **Delivery-based Transportation Requirement** (DTR) and a **Freight Unit** (FU).
- Both the DTR and the FU are visible in the Inbound Delivery (ECC) by using the "**TM Status**" tab.

ERP-TM Document Flow	ERP Doc	Quantity	Unit	Status	BTD ID	BTD Descr.	BTD Cat.	BTD Cat.
Inbound Delivery	180075157				180075157	Inbound Delivery 180075157		
Delivery-Based Transportation Requirement	180075157				1100000099	DTR for UNOE 1100000099 (Inbound Delivery 180075157)	02	Delivery-Based Tr
Inbound Delivery Item	180075157	2	EA		1100000099	DTR for UNOE 1100000099 (Inbound Delivery 180075157)	02	Product
Freight Unit	180075157				4100000395	UNOE Planned Frt Unit 4100000395	FU	Freight Unit

- With the current system configuration, there is a "**1 to 1 relationship**" between IBD, DTR & FU: 1 Inbound Delivery – 1 Delivery-based Transportation Requirement – 1 Freight Unit.
- The **Delivery-based Transportation Requirement** (DTR) document is the representation in TM of the ECC Inbound Delivery document.
- A **Freight Unit** (FU) represent a set of goods that are transported together across the entire transportation chain. The following data is available in the FU document:
  - Items
  - Transportation stages
  - Document flow
  - Status information

UNOE – PLAN PHASE – Goods vendor vs Freight Forwarder

Umoja System
Create DTR

Umoja System
Create Freight Unit

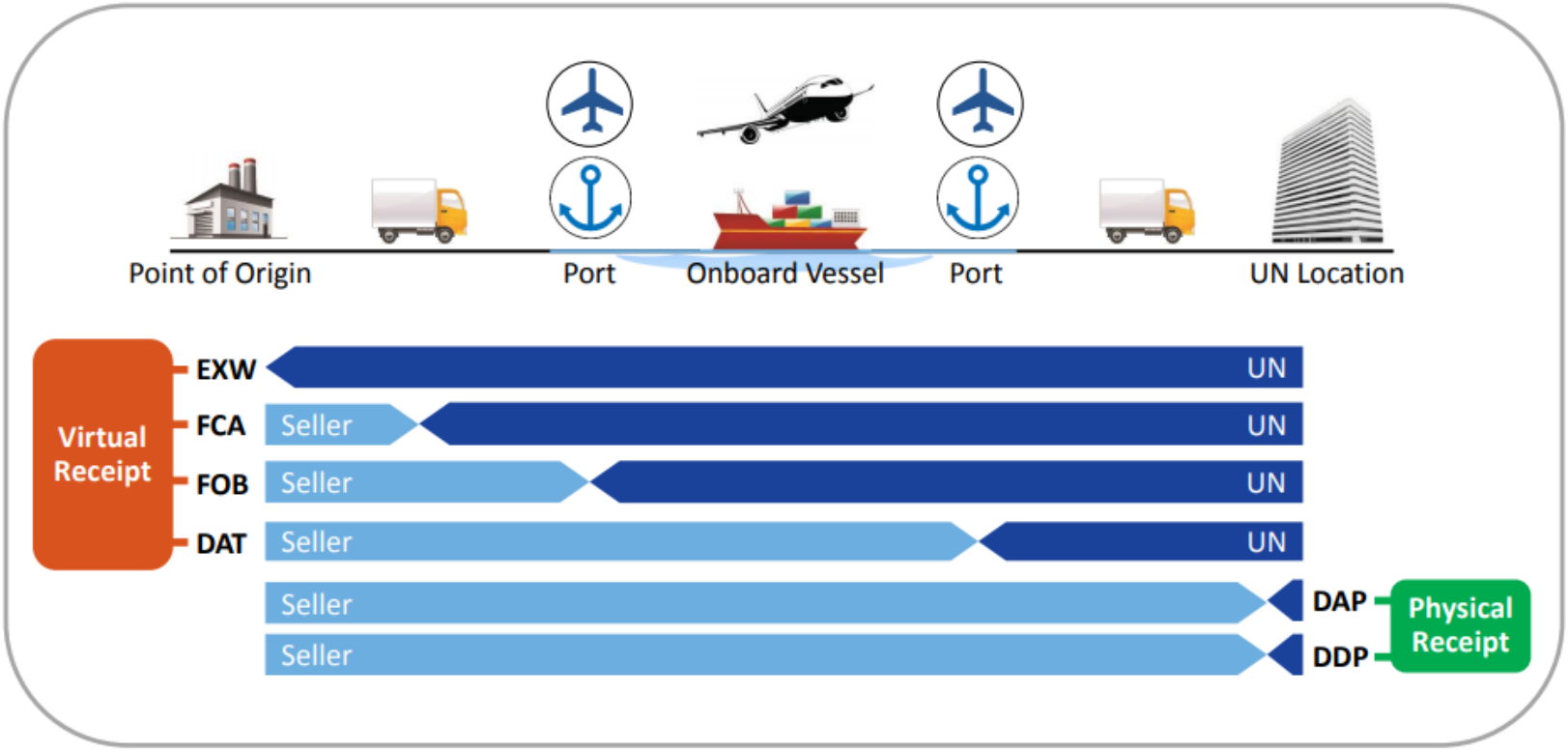
T M

Goods Vendor
FCA/FOB/ DAT/ DAP

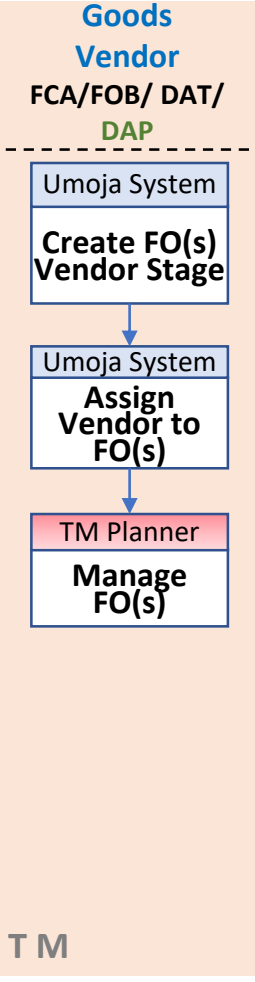
Create FO(s) Vendor Stage

Umoja System
Assign Vendor to FO(s)

TM Planner
Manage FO(s)



UNOE – PLAN PHASE – GOODS VENDOR STAGE



- In a UNOE scenario, the Goods Vendor stage applies to **FCA/ FOB/ DAT & DAP** Incoterms. In this stage the Goods Vendor is responsible for delivering the items to the agreed location.
- Based on the TM **Transportation Network** (Master Data), the system selects the default route between the vendor location and the delivery location and creates as many **Freight Orders** as legs in the route.
- The system automatically assigns the Goods Vendor *(e.g. Toyota)* as **Carrier** to these newly created Freight Orders.
- These automatically created Freight Orders are in "**Ready for Execution**" status allowing the Goods Vendor to connect to the Carrier Collaboration Portal (CCP) to submit the events related to each FO *(i.e. leg)*.
- Should the automatically created Freight Orders differ from the **vendor's actual route**, the TM Planner can delete and re-create them to reflect the real route and to facilitate the insertion of events at a later stage.

UNOE – PLAN PHASE – FREIGHT FORWARDER STAGE – 1/4

Freight FW Stage
EXW / FCA/ FOB/ DAT

TM Planner

Select FU(s) in TM Cockpit

- In a UNOE scenario, the Freight Forwarder stage applies to **EXW** & **FCA/ FOB/ DAT** Incoterms. In this stage the Freight Forwarder is responsible for delivering the items to the final destination.
- Freight Units appear in the **Transportation Cockpit** filtered by **Profile** *(EXW vs non-DAP/EXW)*:.

Profile and Layout Sets (4)

Save | New | Copy | Refresh Unplanned Requirements | Refresh Job Status

Description	N...	Freight Unit Selection Profile	Transportation Unit Selection Profile
UNOE DAP 2		ZSEL_FU_UNOE_SUPPLIER_DELIVERED	ZSEL_FO_UNOE_SUPPLIER_DELIVERED
UNOE non-DAP/EXW Supplier Stage		ZSEL_FU_UNOE_SUPPLIER_DEL_STAGE	ZSEL_FO_UNOE_SUPPLIER_DELIVERED
UNOE EXW		ZSEL_FU_UNOE_EXW_FORWARDER_DELIVERED	ZSEL_FO_UNOE_FORWARDER_DELIVERED
UNOE non-DAP/EXW - FFW Stage		ZSEL_FU_UNOE_FORWARDER_DELIVERED	ZSEL_FO_UNOE_FORWARDER_DELIVERED

Goods Vendor Stage
- DAP
- FCA, FOB, DAT

Freight FW Stage
- EXW
- FCA, FOB, DAT

Several Freight Units (FUs) with the same pick-up and destination locations can be **consolidated** to be transported together. There is a **time window** *(currently 7 days)* that allows multiple FUs to be consolidated.

Freight Unit Stages (10/12)

Split/Merge | Stages | Create Capacity Document | Create Multiple Capacity Documents | Remove Capacity Document

I..	Freight Unit	S...	P	Loading Location	Unloading Loc...	Earliest Requested Date...	Latest Requested Date...	E
	4100000361	40		MOMBASA_PORT	SPSSA2	07.01.2019	12.12.2018	1
	4100000353	20		DURBAN_PORT	SPSSA1	26.11.2018	03.12.2018	0
	4100000400	20		DURBAN_PORT	SPSSA1	04.03.2019	11.03.2019	0
	4100000401	20		DURBAN_PORT	SPSSA1	10.03.2019	17.03.2019	0

Several FUs can be consolidated for transportation purposes

T M

UNOE – PLAN PHASE – FREIGHT FORWARDER STAGE *(EXW-FCA)* - 3/4

Freight FW Stage
EXW / FCA/ FOB/ DAT

TM Planner
Select FU(s) in TM Cockpit

↓

Umoja System
Generate TM Proposals

↓

TM Planner
Select Best TM Proposal

↓

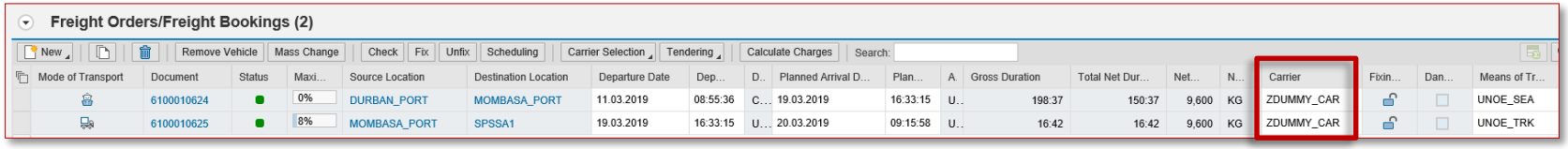
Umoja System
Calculate Charge Estimate

↓

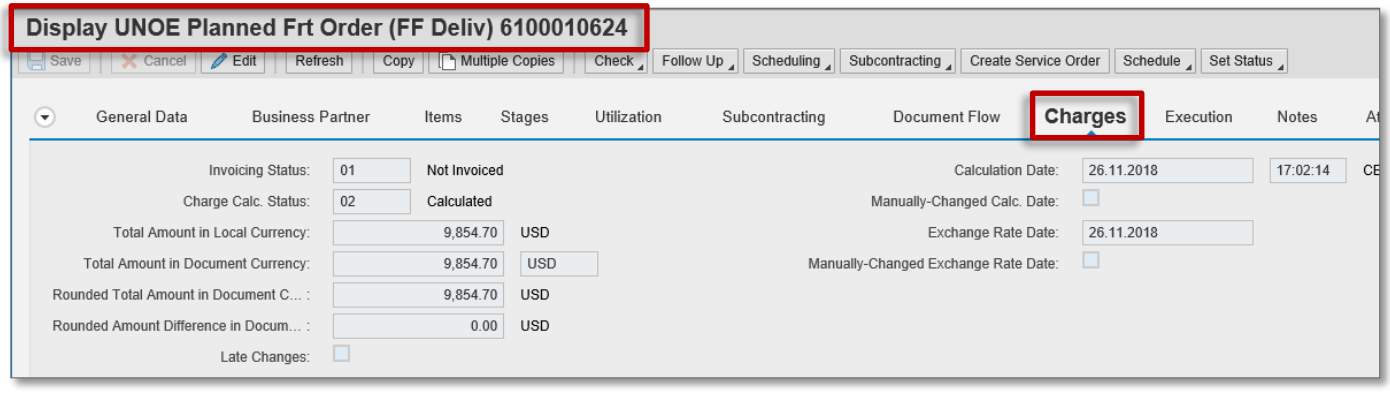
Umoja System
Create FO(s) FFW Stage

T M

- The system creates the new **Freight Orders** for the FFW stage based on the proposal selected *(one for each leg).*



- The Carrier is defaulted to ZDUMMY_CAR until the freight is awarded and the real carrier is assigned.
- The system automatically calculates the estimated Charges based on the “Charges Master Data”.



UNOE – PLAN PHASE – FREIGHT FORWARDER STAGE *(EXW-FCA)* - 4/4

Freight FW Stage
EXW / FCA/ FOB/ DAT

TM Planner
Select FU(s) in TM Cockpit

↓

Umoja System
Generate TM Proposals

↓

TM Planner
Select Best TM Proposal

↓

Umoja System
Calculate Charge Estimate

↓

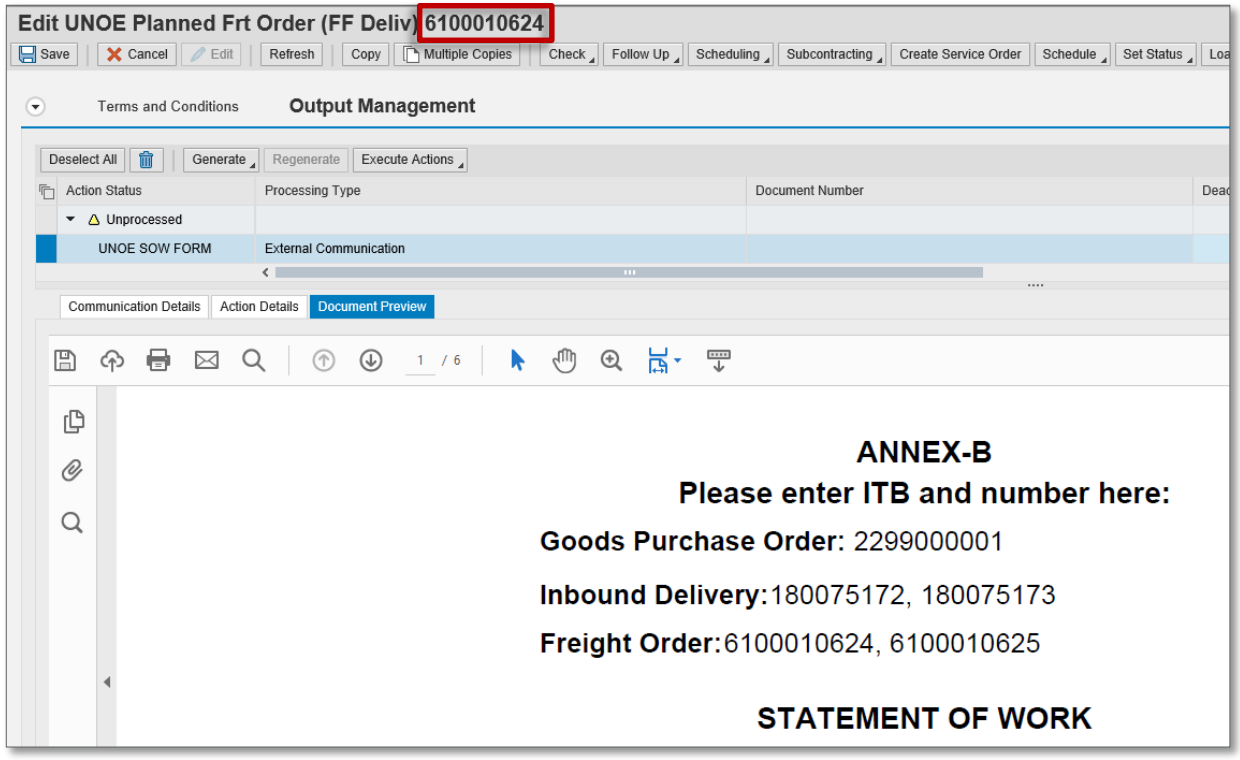
Umoja System
Create FO(s) FFW Stage

↓

TM Planner
Generate SOW

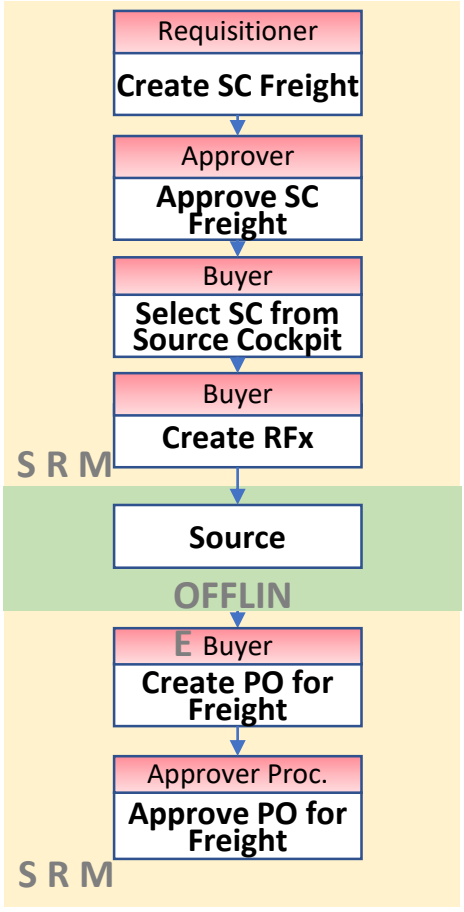
T M

- A "**Statement Of Work**" document (SOW) can be downloaded from each Freight Order. The SOW can be printed and **edited**. The SOW serves as an input for the Freight Procurement phase.
- The **SOW** includes all the Freight Orders related to the same Shipment.



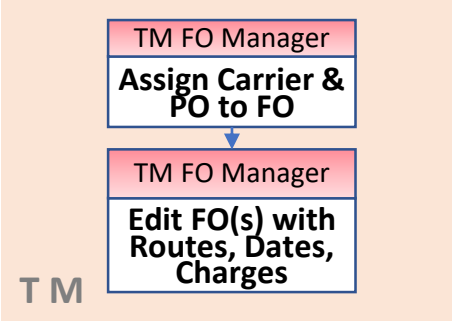
** Specific templates are available for UNOE, COE & Troops.*

UNOE – PROCURE FREIGHT PHASE – 1/2



- The Freight Procurement steps in the system remain very similar as they currently are.
- Below some items to be considered with the TM implementation:
  - ✓ Freight Services are requested in a separate Shopping Cart *(no more $1 line for freight in the goods shopping cart).*
  - ✓ The SOW to be attached in the Freight Shopping Cart can be downloaded directly from Umoja TM.
  - ✓ TM is now the single source of information for the transportation requirements.

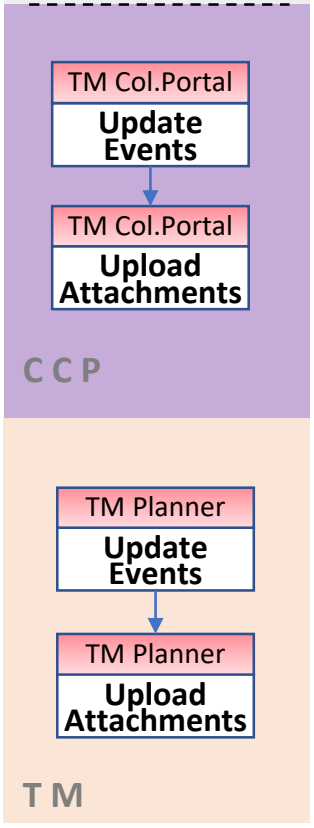
UNOE – PROCURE FREIGHT PHASE – 2/2



- Once the freight services have been awarded, the Freight Order in TM has to be updated with the **selected carrier** and the related **purchase order number**.
- Once the carrier is assigned in the FO, the FO execution status changes to "**Ready for Execution**" allowing the freight forwarders to submit the related events.
- Moreover the Freight Order needs to be updated with:
  - ✓ Actual **Route**: If the route selected by the carrier is different to the planned route, the FO has to be updated with the new route as it is used to report events.
  - ✓ Actual **Dates**: The planned dates need to be updated in the Freight Order based on the information provided by the Freight Forwarder .
  - ✓ Actual **Charges**: The Freight Order charges have to be updated with the actual ones appearing in the Freight Purchase Order. The system allows comparing the estimated charges and the actual charges for reporting purposes.

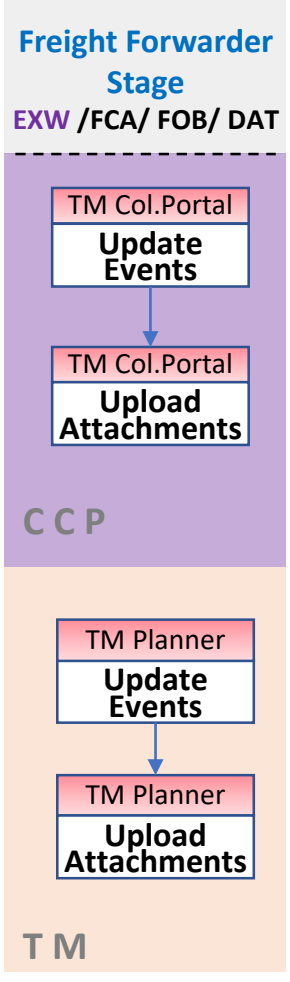
UNOE – EXECUTE & MONITOR PHASE - GOODS VENDOR STAGE

Goods Vendor / TCC Stage
FCA/ FOB/ DAT/ DAP



- Goods Vendors will be provided with login credentials for the Umoja Carrier Collaboration Portal (CCP).
- In CCP, Goods Vendors will see the Freight Orders they are responsible for the transportation. They will be able to submit events and upload attachments:
  - ✓ Examples of **Events**:
    - ✓ **Planned**: Loading Start/End, Departure, Arrival, etc.
    - ✓ **Unexpected**: Delay, Damage, etc.
  - ✓ Examples of **Attachments**: Packing List, Bill of Lading, Proof of Delivery, etc.
- All Events/Attachments submitted via CCP are displayed in TM.
- In case the vendor cannot connect to CCP, Umoja role "**TS.01 TM Planner and TS.02 Manage Freight Orders**" can update the related events/attachments directly in the TM module. These Events/Attachments are also displayed in CCP
- Once the first event is submitted, the FO execution status changes to "**In Execution**". No changes in the route are further allowed.
- Other Umoja follow on documents:
  - **DAP**: Physical Goods Receipt
  - **FCA**: Virtual Goods Receipt & Stock Transport Order

UNOE – EXECUTE & MONITOR PHASE – FREIGHT FORWARDER STAGE



- Freight Forwarders will be provided with login credentials for the Umoja Carrier Collaboration Portal (CCP).
- In CCP, Freight Forwarders will see the Freight Orders they are responsible for the transportation. They will be able to submit events and upload attachments.
- All Events/Attachments submitted via CCP are displayed in TM.
- In case the vendor cannot connect to CCP, Umoja role "**TS.01 TM Planner and TS.02 Manage Freight Order**" can update the related events/attachments directly in the TM module. These Events/Attachments are also displayed in CCP
- Once the first event is submitted, the FO execution status changes to "**In Execution**". No changes in the route are further allowed.
- Other Umoja related documents:
  - **Predecessor documents** : Virtual Goods Receipt & Stock Transport Order
  - **Follow-on documents** : Physical Goods Receipt

UNOE INTEGRATION

Transportation Planning and Management and Track & Trace (TPTM – T&T project)

Elena Carrasco

UCS Training Team

Tuesday, October 22, 2019

1 PURCHASING FREIGHT SERVICES

With the adoption of the TM solution, the freight requirement *(in case UN is responsible for providing it)* shall not be included in the Goods Shopping Cart and Purchase Orders,

No $1 line for freight services

Item Overview

Details | Add Item | Copy | Paste | Duplicate | Delete | Create Confirmation | Create Invoice | Process All Items

Line Number	Item Type	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit
1	Material		2100000224	Forklift:Indl,HD,Diesel,4x2	25101900	SpecializedVechicles	1	EA
2	Material		2100000284	Ambulance,Diesel,LHD,4x2	25101700	Safety,RescueVehicle	1	EA
3	Material		2100000468	Vhcl:GP,Diesel,LHD,4x4,HD	25101507	GP&UtilityVeh	1	EA
4	Material		2100000224	Forklift:Indl,HD,Diesel,4x2	25101900	SpecializedVechicles	1	EA
5	Material		2100000284	Ambulance,Diesel,LHD,4x2	25101700	Safety,RescueVehicle	1	EA
6	Material		2100000468	Vhcl:GP,Diesel,LHD,4x4,HD	25101507	GP&UtilityVeh	1	EA
7	Service		3000000	Freight Multimodal on Purchase	78100000	Mail,CargoServ	1	EA

Goods & freight not in the same Shopping Carts and Purchase Orders

Price for the freight forwarder's leg will be stated in a separate funded shopping cart and purchase order, with help of the estimated freight cost calculated by Umoja TM and by attaching the generated SOW.

Document Hiera...	M	Means of Transport	Source Location	Destination Location	Loadi...	Unloa...	D...	D	Duration	Carrier	Vehicle	Sche...	Execution Document	Trans...	Trans...	Costs	Freight Order Costs
Transpor...		UNOE_SEA	SU1110015341	SPLBA1	04.10....	11.10....		K..	156:33		UNO...		$1	04.10....	11.10....	15996903.00	15996902.00
Freight...		UNOE_SEA	SU1110015341	SPLBA1	04.10....	11.10....		K..	156:33		UNO...		$1	04.10....	11.10....	0.00	15996902.00
Stag...		UNOE_TRK	SU1110015341	DUBAI_PORT	04.10....	05.10....		K..	1:56	1110015341	UNO...		6100028162	04.10....	05.10....	0.00	0.00
Stag...		UNOE_SEA	DUBAI_PORT	NAQOURA_PORT	05.10....	11.10....	2...	K..	154:35		UNO...		$1	05.10....	11.10....	0.00	15989851.00
Stag...		UNOE_TRK	NAQOURA_PORT	SPLBA1	11.10....	11.10....	0...	K..			UNO...		$2	11.10....	11.10....	0.00	7051.00

2 DELIVERY ADDRESS / PERFORMANCE LOCATION

Delivery address plays a pivotal role throughout *Requisitioning- Procurement- Inbound Coordination* processes.

Therefore it is integrated in all four Umoja modules *(SRM, ECC, TM, CCP)* and in all documents *(Shopping Carts, Purchase Orders, Inbound Delivery, Delivery Transportation Requirement, Freight Unit and Freight Order).*

SRM

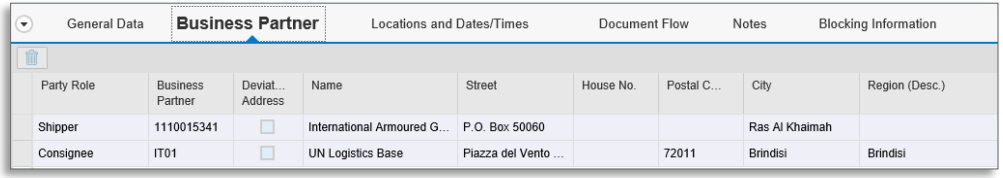
Shopping Cart:
Delivery Address/ Performance Location

*Selection of Delivery address shall be done by using the **matchbox** so that TM will recognize it and will propose the last leg correctly.*

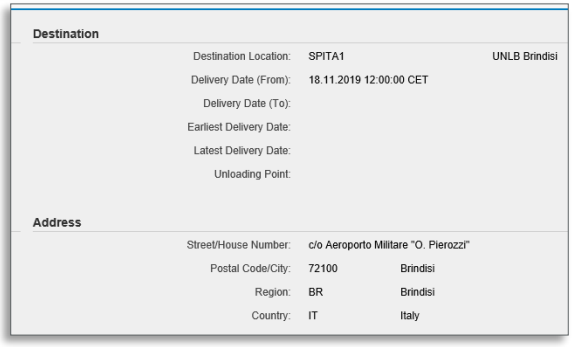
If you otherwise type the address manually the location will not be properly recognized in the new Umoja Transportation Module.

TM

DTR:
Business Partner ->Consignee Address



DTR:
Locations and Dates/ Times - > Destination, Address:

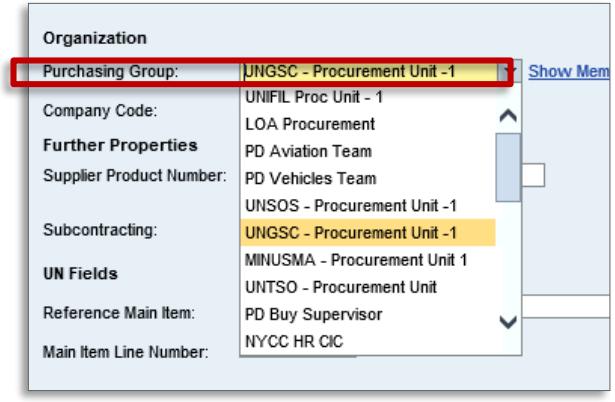


3 PURCHASING GROUP

Sales group (TM) is the nomenclature of Purchase Group (SRM) in TM. Purchasing Group is linked to Planner Group (TM):

- ✓ Triggers the **buyers** who will have access to the Shopping Carts and Purchase Orders
- ✓ Triggers the **transportation planners** who will have access to plan transportation

In a Shopping Cart



In a Purchase Order

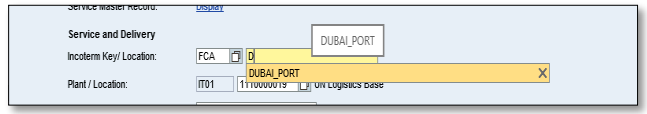
4 INCOTERM KEY & LOCATION

The **Incoterm Key** selection will impact the type of carrier that is responsible for the transportation (e.g. DAP = Goods Vendor or EXW = Freight Forwarder).

SRM

Shopping Cart:

- ✓ When items are selected from the contract catalog -> incoterm is not derived and needs to be entered manually

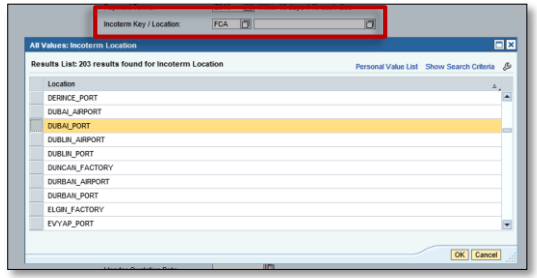


- ✓ When items are not from contract catalog, or its an unfunded shopping cart -> incoterm can be left blank

Incoterm term is to be selected from a Mathbox. **Location** is free text.

Purchase Order:

- Incoterm Key/ Location are **mandatory fields**
- Incoterms rules are at Header level (same for all the PO items)
- Both fields shall be filled in by using both **matchbox,** otherwise it may not integrate with TM module

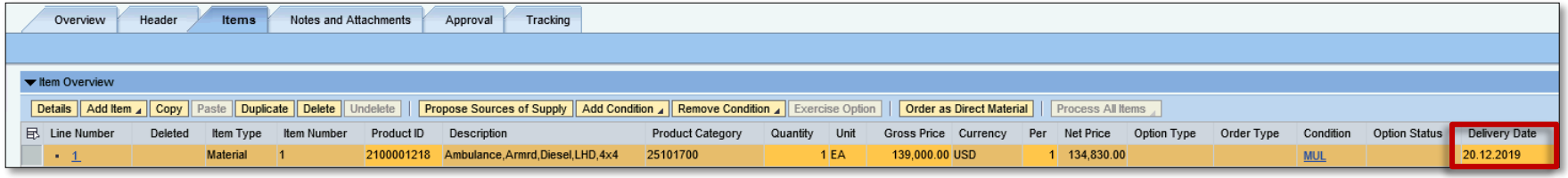


5 DELIVERY DATE

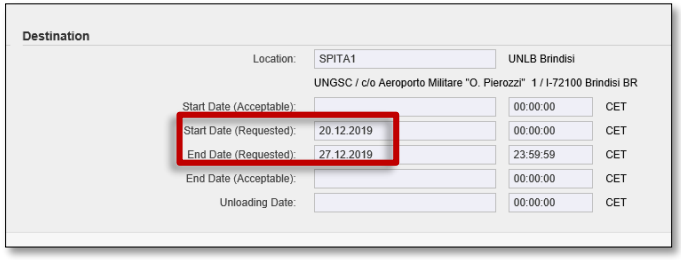
Requisitioners state their desired Delivery Date and Procurement will confirm availability with the Vendor on the PO.

Purchase Order's delivery date is set at item level, and they will determine the **number** of Inbound Delivery, Delivery Transportation Requirement and Freight Unit created.

Delivery date at incoterm location in SRM (provided that no changes on dates are updated in the IBD document) impacts TM as it is used as baseline date to estimate all other related dates *(departure- , handover-, arrival at destination-, etc.)* based on the UN Transportation Network Master Data.



PO Delivery Date (SRM) defaults the FU's start date and End date (TM) TM module



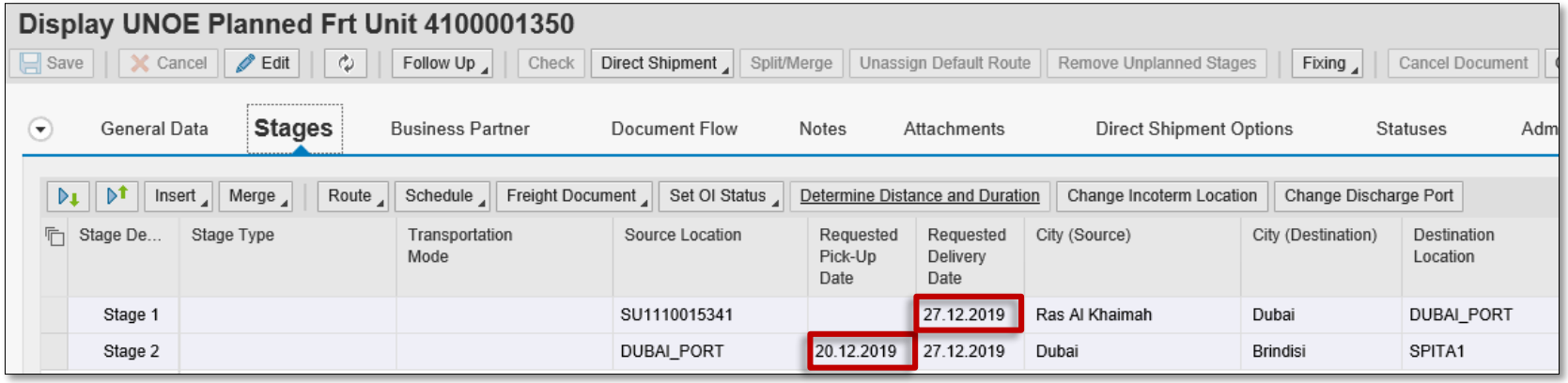
5 DELIVERY DATE

In Purchase Orders with Incoterm rules Non-DAP / Non-Exw, **Stages** tab shows two stages:

- ✓ Stage 1 is from Source Location (vendor) to the destination location (handover location) which is the Incoterm location defined in the inbound delivery document.

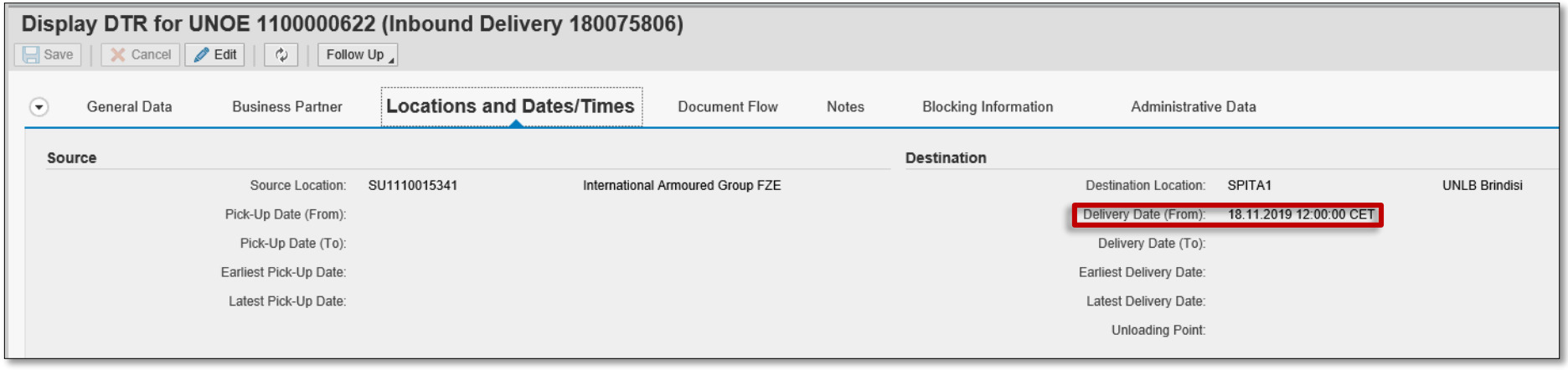
  The requested delivery date/time for stage 1 is defined to be the **delivery date/time set in the inbound delivery document.**

- ✓ Stage 2 is from the handover location to the shipping point address. The requested pick-up date/time on Stage 2 is successfully populated as the **delivery date/time set in the inbound delivery document** for the handover location.



5 DELIVERY DATE

Changes of delivery date in the Inbound Delivery will trigger changes in the Delivery Date at Destination in DTR:



6 PACKING

Once packing is updated in the Inbound Delivery document (ECC), information of the packaging is transferred into the FU's information (TM)

Required Capacity

Weight:	9,800	KG
Volume:	88.38	M3
Pieces:	1	EA

Items

Set to Picked Up

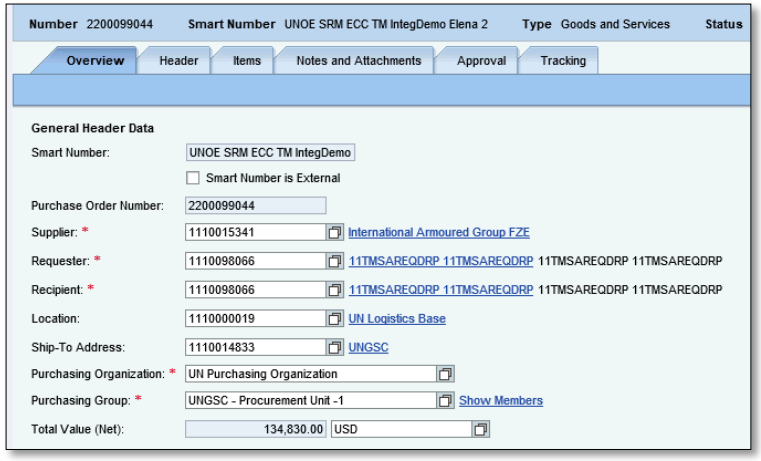
Items	Item	Item Category	Package ID	Item Description	Product	Gross Volume	Gross Volume UoM	Gross Weight	Gross Weight UoM	Qua...	Qua... Unit of Measure
Package	30	Package	1000000761		1900000088	88.38	M3	9,800	KG	1	EA
Product	20	Product		Ambulance,Armrd,Diesel,...	2100001218	49.83	M3	7,500	KG	1	EA

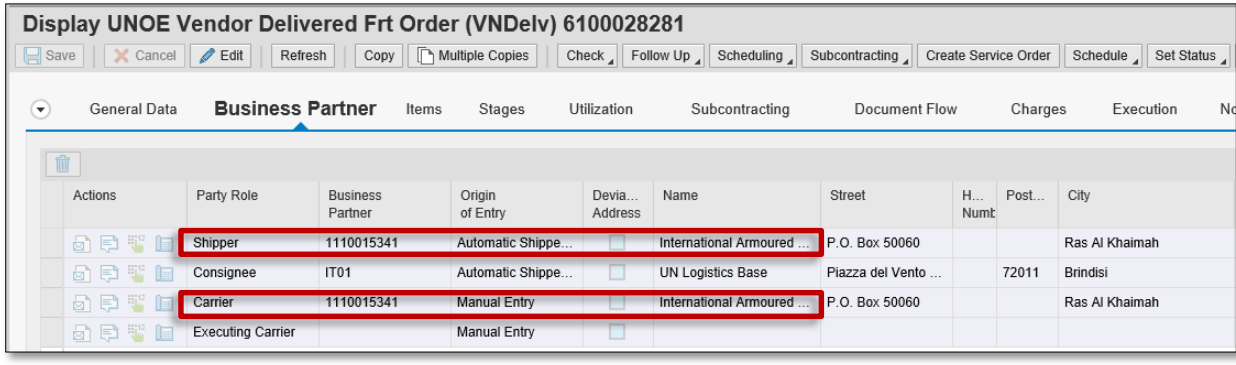
Includes goods+ packaging material's information

7 VENDOR

Selecting a vendor from the **SRM** contract catalog in the Shopping Cart or a supplier in the Purchase Order will impact **TM** as follows:

- ✓ Vendor will be granted access to the **Carrier Collaboration Portal** and will be able to submit events *(except in EXW)*
- ✓ TM identifies the **Shipper** address (supplier address)
- ✓ Vendor appears as carrier in the Vendor Delivered Freight Order





INTER/INTRA MISSION TRANSFERS

Transportation Planning and Management and Track & Trace (TPTM – T&T project)

Bryan Barrachina

UCS Training Team

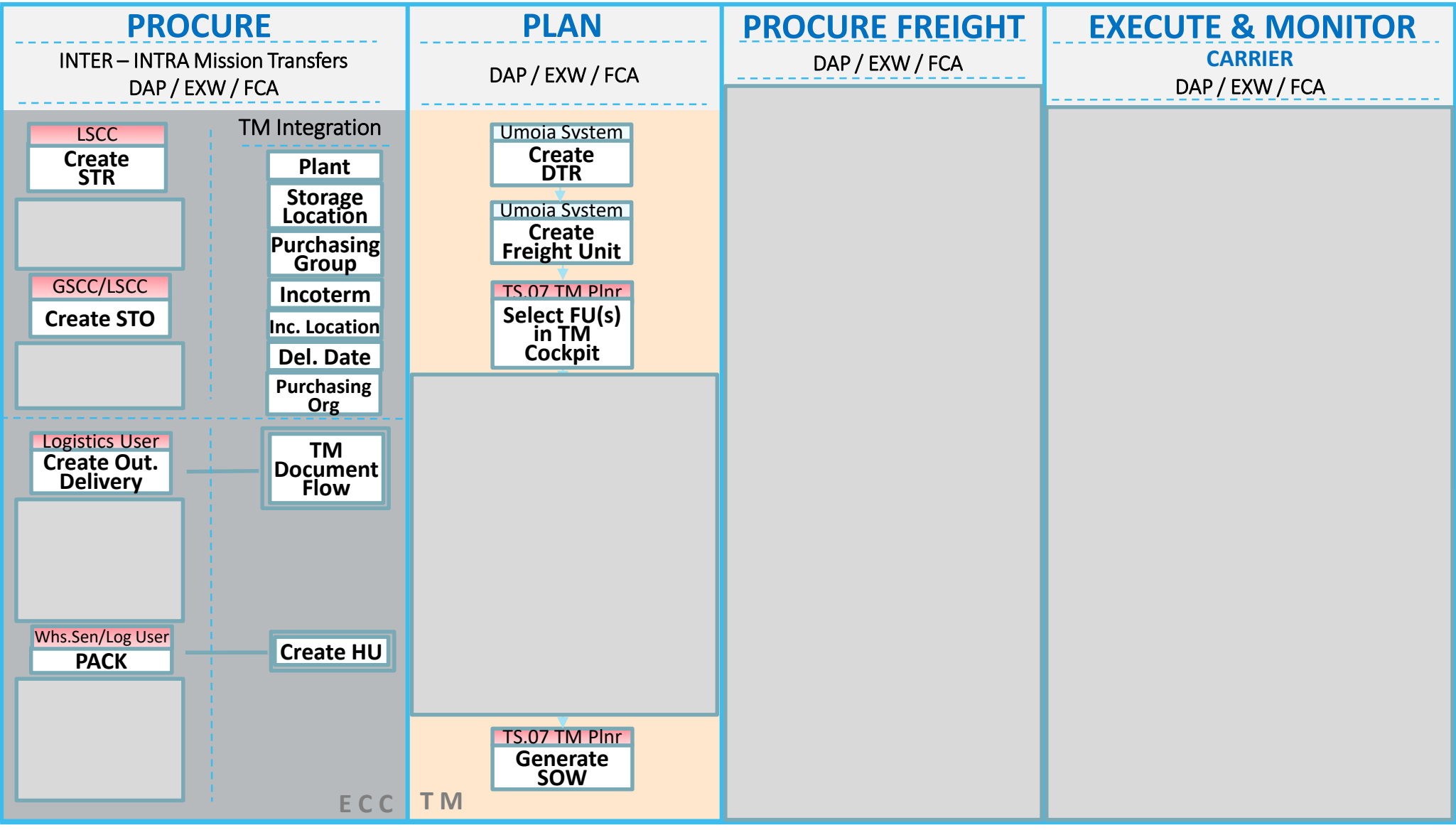
Tuesday, October 22, 2019

ECC & TM DERIVATIONS

ECC	TM
Purchasing Group →	Planning & Execution Group
T66	PT66
Plant	Plant
UNAMI IQ20	UNAMI IQ20
Purchasing Organization	Sales Organization
1000	1000

Organizational Data			
	Sales Organization:	SO_1000	United Nations Sales Org.
	Sales Office:		
	Sales Group:	SG_T66	STO - UNAMI

ECC/STO				TM = NEW
Entity	Plant	Purchasing Grp	Description	Planning & Execution Grp
UNGSC	IT01	TG1	GSCC - ENG	PSTO
UNGSC	IT01	TG2	GSCC - ICT	PSTO
UNGSC	IT01	TG3	GSCC - MED	PSTO
UNGSC	IT01	TG4	GSCC - SHQ	PSTO
UNGSC	IT01	TG5	GSCC - SUP	PSTO
UNGSC	IT01	TG6	GSCC - TPT	PSTO
UNGSC	IT01	TR1	UN Reserve	PSTO
UNGSC	IT01	TS1	SDS	PSTO
UNOCA	GA20	T32	UNOCA	PT32
UNOAU	ET20	T34	UNOAU	PT34
UNOWAS	SN20	T38	UNOWAS	PT38
UNSMIL	LY20	T40	UNSMIL	PT40
MINUSMA	ML10	T45	MINUSMA	PT45
OJSRS	SY20	T47	OJSRS (OSE-Syria)	PT47
UNSCOL	LB20	T50	UNSCOL	PT50
UNSCO	IL20	T51	UNSCO	PT51
UNMIK	XK10	T53	UNMIK	PT53
UNGSC	IT01	T58	UNGSC	PT58
UNTSO	IL10	T60	UNTSO	PT60
UNIFIL	LB10	T62	UNIFIL	PT62
UNDOF	SY10	T63	UNDOF	PT63
UNFICYP	CY10	T64	UNFICYP	PT64
UNAMI	IQ20	T66	UNAMI	PT66
UNMOGIP	PK10	T67	UNMOGIP	PT67
UNRCCA	TM20	T68	UNRCCA	PT68
UNITAD	IQ21	T69	UNITAD	PT69

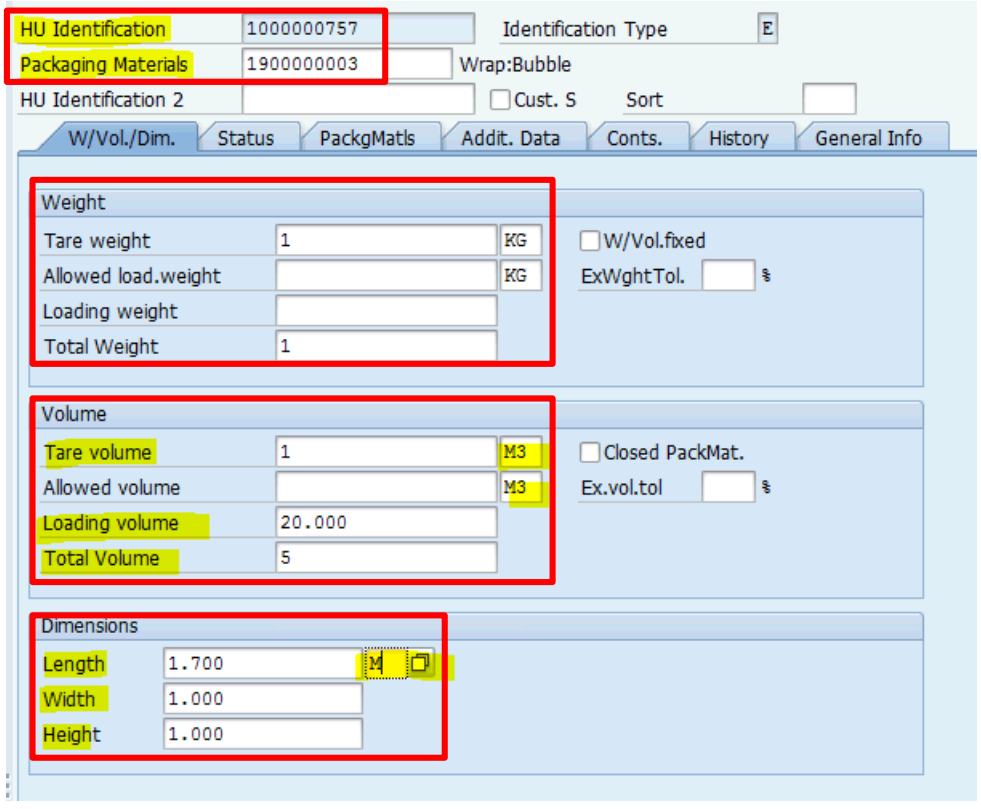

PROCURE
INTER – INTRA Mission Transfers
DAP / EXW / FCA
LSCC
Create STR
GSCC/LSCC
Create STO
TM Integration
Plant
Storage Location
Purchasing Group
Incoterm
Inc. Location
Del. Date
Purchasing Org
Logistics User
Create Out. Delivery
TM Document Flow
Whs.Sen/Log User
PACK
Create HU
ECC
PLAN
DAP / EXW / FCA
Umoia System
Create DTR
Umoia System
Create Freight Unit
TS.07 TM Plnr
Select FU(s) in TM Cockpit
TS.07 TM Plnr
Generate SOW
TM
PROCURE FREIGHT
DAP / EXW / FCA
EXECUTE & MONITOR
CARRIER
DAP / EXW / FCA

ECC & TM INTEGRATIONS

Whs.Sen/Log User
PACK
ECC

The Packing details as well as the selected Packaging Material/s and Handling Unit/s will have a direct impact in TM documents (DTR/FU/FO/SOW)

Packing is crucial as it will reflect Weight in Volume of Goods when Soliciting for Freight Forwarders



STR/STO – ROLES AND RESPONSIBILITIES in TM

STOCK TRANSFER WITHIN MISSION/PLANT

One-Step Transfer – Physical Proximity *(Same Fund / Funds Center)*

Two-Steps Transfer – Short Distance *(Same Fund / Funds Center)*

ZINT - Intra-mission STO – Track Shipment *(Same Fund / Funds Center)*

STOCK TRANSFER BETWEEN DIFFERENT MISSIONS/PLANTS

Between Missions Non-Budget Relevant & UN Reserve Stock (ZNBD)

Between Missions Budget Relevant (ZBUD)

From Strategic Deployment Stock (ZSDS)

INTER/INTRA – PLANNING PROFILE *(DAP/EXW/FCA)*

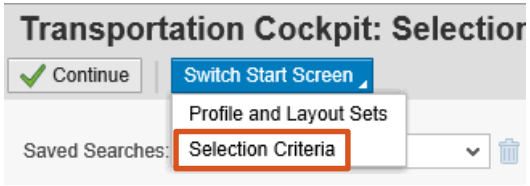
TS.07 TM Plnr
Select FU(s) in TM Cockpit
T M

INTER & INTRA **DAP, EXW** & **FCA** Incoterms scenarios, need to be planned by the STO TM Planner (TS.07).

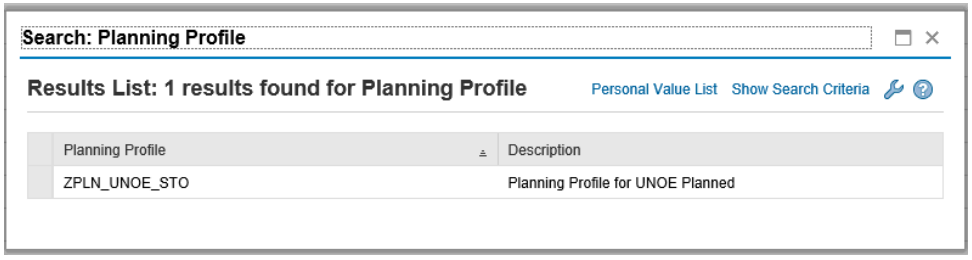
Freight Units linked to the **Planning & Execution Group** of the Receiving or Shipping Plants in TM appear in the **Transportation Cockpit**:

- The TM Planner chooses the type of Profile to view and Layout Settings in the Planning Profile screen

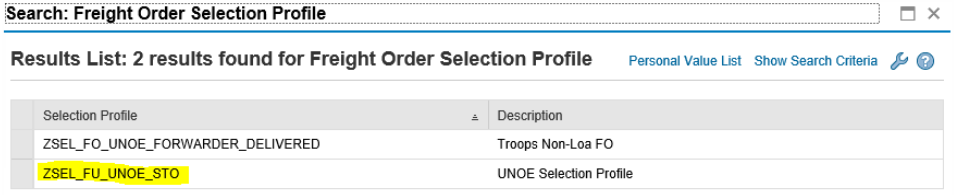
- Or selects the Profile and Layout Set defaulted according to role to view the FUs by **Incoterm** *(DAP, EXW and non-DAP/EXW)*



Planning Profile:
ZPLN_UNOE_STO



Freight Unit Selection Profile:
ZPLN_UNOE_STO



INTER/INTRA – Transportation Cockpit *(DAP/FCA/EXW) Scenarios*

TS.07 TM Plnr

Select FU(s) in TM Cockpit

T M

The TS.07 combines FUs according to Origin, Destination and Delivery Dates. A 7 day date range is considered when combining of FUs. Anything beyond that will result in a non-possible combination.

INTER Mission Transfers

For DAP and FCA scenarios, the **Shipping Plant**'s TS.07 manages the FUs and plans transportation proposals from origin to destination.

For EXW scenarios, the **Receiving Plant**'s TS.07 manages the FUs and plans transportation proposals from origin to destination

Freight Unit Stages (25)

Split/Merge | Stages | Create Capacity Document | Create Multiple Capacity Documents

Original...	I..	Freight Unit	S	P	Loading...	Unloadin...	Earliest...
80004104		4100001300	2..		BRINDI...	SPAFB2	29.09.2019
80004103		4100001295	1..		SPITA2	BRINDISI...	
80004103		4100001295	2..		BRINDI...	SPAFB2	19.09.2019
80004081		4100001270	1..		SPITA2	BRINDISI...	
80004081		4100001270	2..		BRINDI...	SPAFB2	29.09.2019
80004079		4100001269	1..		SPITA2	SPIQA3	29.09.2019
80004080		4100001267	1..		SPITA2	SPIQA3	29.09.2019
80004074		4100001263	1..		SPITA2	SPCDF7	
80004065		4100001254	1..		SPITA2	BRINDISI...	15.09.2019
80004065		4100001254	2..		BRINDI...	SPIQA3	15.09.2019
80004053		4100001240	1..		SPITA2	BRINDISI...	29.09.2019
80004053		4100001240	2..		BRINDI...	SPIQA3	29.09.2019
80004055		4100001239	1..		SPITA2	BRINDISI...	29.09.2019
80004055		4100001239	2..		BRINDI...	SPIQA3	29.09.2019
80004054		4100001238	1..		SPITA2	BRINDISI...	29.09.2019
80004054		4100001238	2..		BRINDI...	SPIQA3	29.09.2019

INTRA Mission Transfers

For DAP,FCA and EXW scenarios the **Receiving Plant**'s TS.07 manages the FUs and plans transportation proposals from origin to destination.

INTER MISSION – PLANNING - *DAP SCENARIO*

TS.07 TM Plnr
Select FU(s) in TM Cockpit

T M

Issuing Plant [IP] → Stock Transfer (STO) → Receiving Plant [RP]

DAP SCENARIO

Plans Transportation

Issuing Plant [IP]

IP Pre → IP Main → IP On → Receiving Plant [RP]

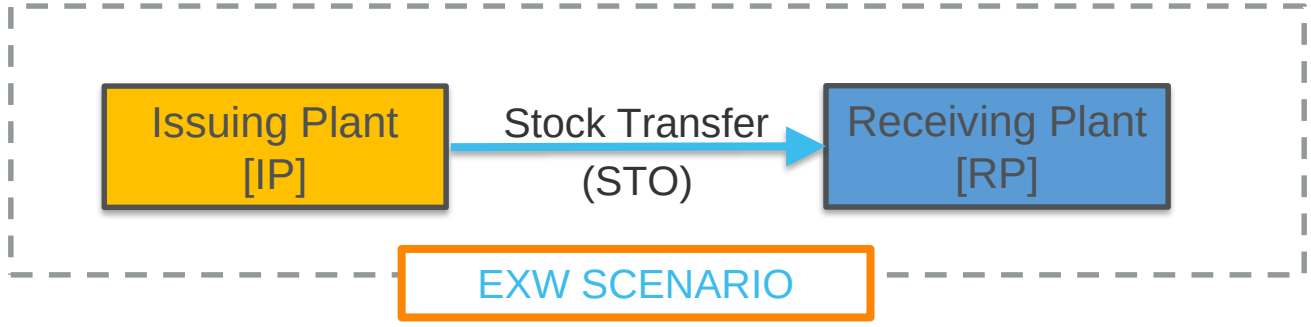
TS.07 TM STO Transportation Planner

Manages Transportation of Freight Units

INTER MISSION – PLANNING - *EXW SCENARIO*

TS.07 TM Plnr
Select FU(s) in TM Cockpit

T M



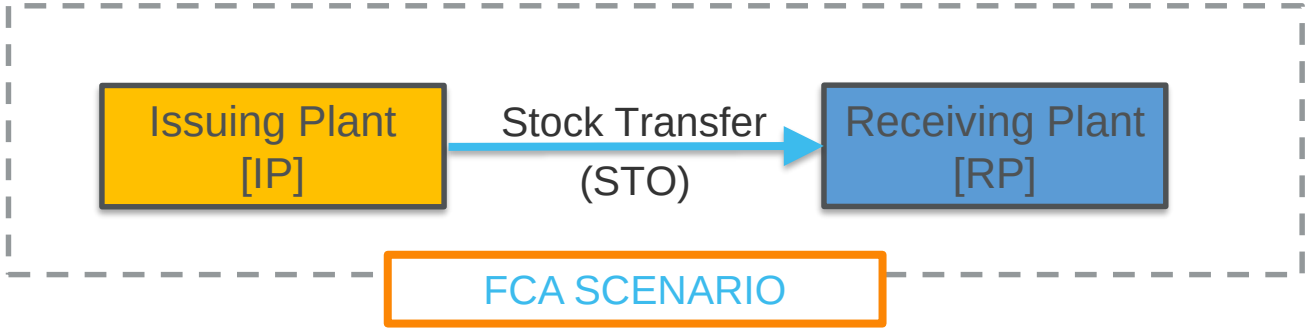
TS.07 TM STO Transportation Planner

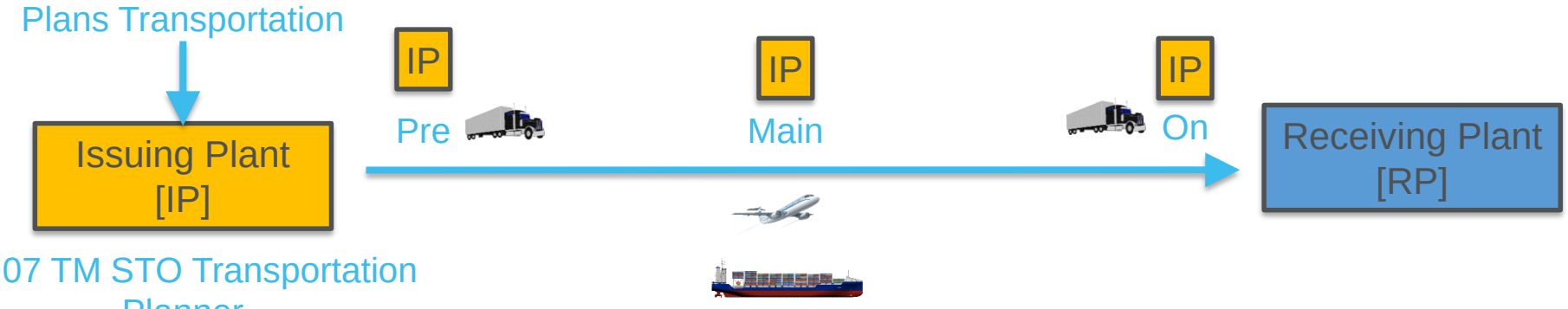
Manages Transportation of Freight Units

INTER MISSION – PLANNING - *FCA SCENARIO*

TS.07 TM Plnr
Select FU(s) in TM Cockpit

T M





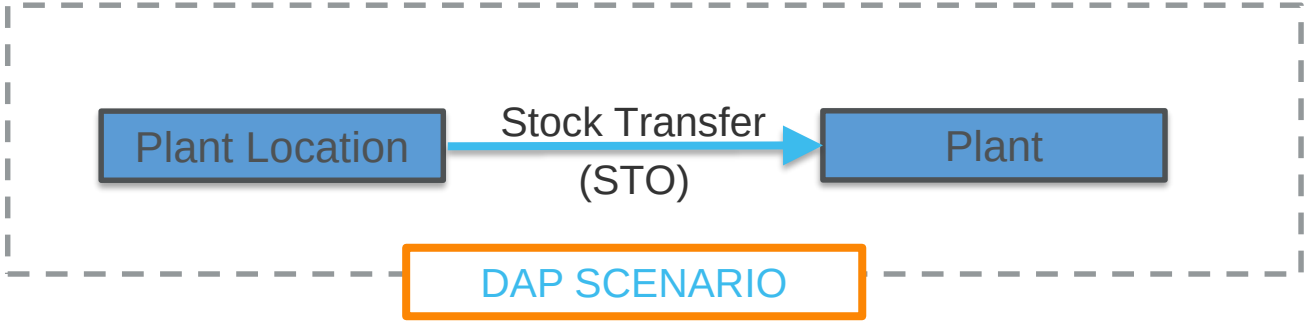
TS.07 TM STO Transportation Planner

Manages Transportation of Freight Units

INTRA MISSION – PLANNING – *DAP*

Select FU(s) in TM Cockpit

T M



TS.07 TM STO Transportation Planner

Manages Transportation of Freight Units

INTER MISSION – Manage Freight Orders (DAP)

T M

TS.08 Freight Proc

Edit FU/FO(s) with Routes, Dates, Charges

Issuing Plant [IP] → Stock Transfer (STO) → Receiving Plant [RP]

DAP SCENARIO

Manages all FOs
From Point of Origin
To UN Location

Issuing Plant [IP]

TS.08 TM STO Freight Procurement
Manages and Executes Freight orders

FO IP Pre

FO IP Main

FO IP On

Receiving Plant [RP]

INTER MISSION – Manage Freight Orders (EXW)

T M

TS.08 Freight Proc

Edit FU/FO(s) with Routes, Dates, Charges

Issuing Plant [IP] → Stock Transfer (STO) → Receiving Plant [RP]

EXW SCENARIO

Issuing Plant [IP]

FO RP Pre

FO RP Main

FO RP On

Manages all FOs From Point of Origin to UN Location

Receiving Plant [RP]

TS.08 TM STO Freight Procurement

Manages and Executes Freight orders

INTER MISSION – Manage Freight Orders (FCA)

T M

TS.08 Freight Proc

Edit FU/FO(s) with Routes, Dates, Charges

Issuing Plant [IP] → Stock Transfer (STO) → Receiving Plant [RP]

FCA SCENARIO

Manages FOs From Point of Origin to Hand-Over Location

Issuing Plant [IP]

TS.08 TM STO Freight Procurement Manages and Executes Freight orders

FO IP Pre

FO Hand-Over RP Main

FO RP On

Manages FOs From Hand-Over Location to UN Location

Receiving Plant [RP]

TS.08 TM STO Freight Procurement Manages and Executes Freight orders

INTRA MISSION – Manage Freight Orders (DAP)

T M

TS.08 Freight Proc

Edit FU/FO(s) with Routes, Dates, Charges

Location in Plant → Stock Transfer (STO) → Plant

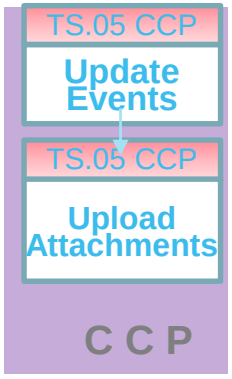
DAP SCENARIO

Manages all FOs from Issuing Location in Plant to Receiving Location in Plant

TS.08 TM STO Freight Procurement

Manages and Executes Freight orders

INTRA/INTER - Event Submission in CCP



Carriers are provided with login credentials for the Umoja Carrier Collaboration Portal (**CCP**).

In CCP, Carriers will see the Freight Orders they are responsible for. They will be also able and responsible for submitting events related to those Stages and upload pertinent documentation as attachments:

- ✓ Examples of **Events**:
  - ✓ **Planned**: Loading Start/End, Departure, Arrival, etc.
  - ✓ **Unexpected**: Delay, Damage, etc.
- ✓ Examples of **Attachments**: Packing List, Bill of Lading, Proof of Delivery, etc.

The process of Submitting Events should be repeated for every Shipping Plant's Freight Orders as well as Receiving Plant's FOs until the Event "**Proof Of Delivery**" is submitted. The submission of this event will set the status of all the Freight Orders to Completed.

All Events/Attachments submitted via CCP are displayed in TM. In case the Carrier cannot connect to CCP, Umoja roles "**TS.07 TM STO Transportation Planner**" can update the related events/attachments directly in the TM module. These Events/Attachments are also displayed in CCP

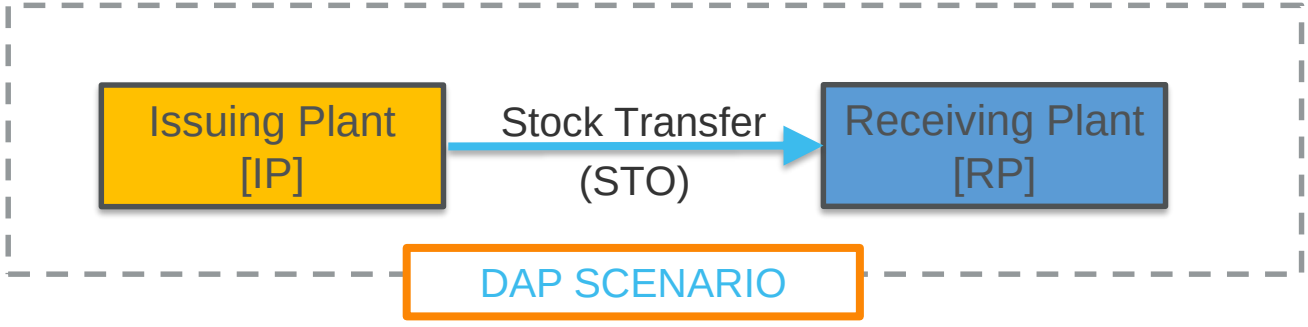
Once the first event is submitted, the FO execution status changes to "**In Execution**". No changes in the route are further allowed.

In case of INTRA mission scenarios (only DAP incoterm), "**TS.07 TM Planner**" will update the related events/attachments directly in the TM module too.

INTER MISSION – Manage Events (DAP)

INTER Mission Transfers Shipping Plant

TS.07 TM Plnr
Update Events



Submits Expected and Unexpected Events in TM

TS.07 TM STO Transportation Planner
Manages Events in TM

INTER MISSION – Manage Events (EXW)

INTER Mission Transfers Receiving Plant

TS.07 TM Plnr
Update Events

Issuing Plant [IP] → Stock Transfer (STO) → Receiving Plant [RP]

EXW SCENARIO

FO RP Pre

FO RP Main

FO RP On

Submits Expected and Unexpected Events in TM

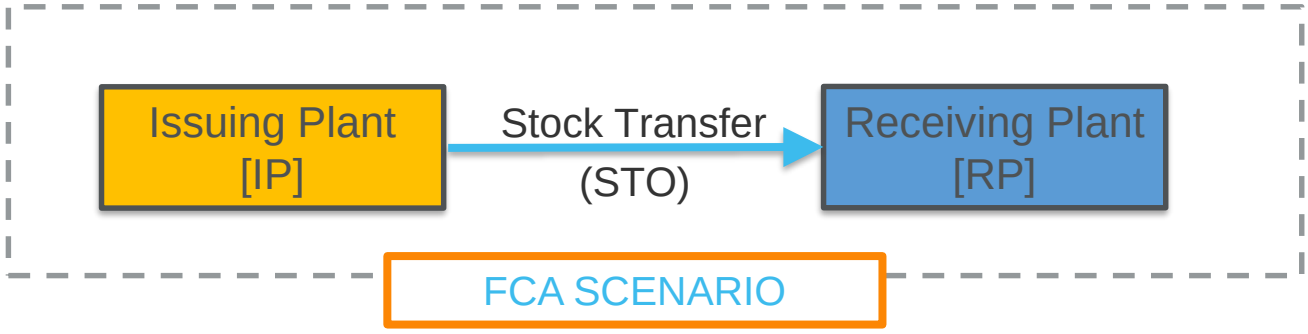
Issuing Plant [IP] → Receiving Plant [RP]

TS.07 TM STO Transportation Planner
Manages Events in TM

INTER MISSION – Manage Events (FCA)

INTER Mission Transfers Shipping Plant & Receiving Plant

TS.07 TM Plnr
Update Events



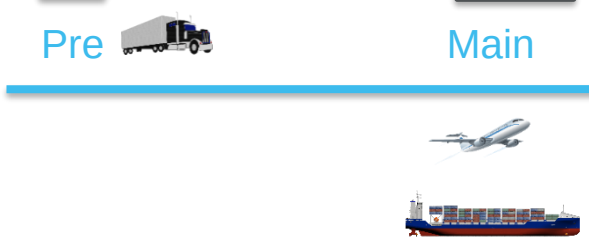
Submits Expected and Unexpected Events in TM for Accountable FOs

FO IP — Pre

FO Hand-Over RP — Main

FO RP — On

Submits Expected and Unexpected Events in TM for Accountable FOs



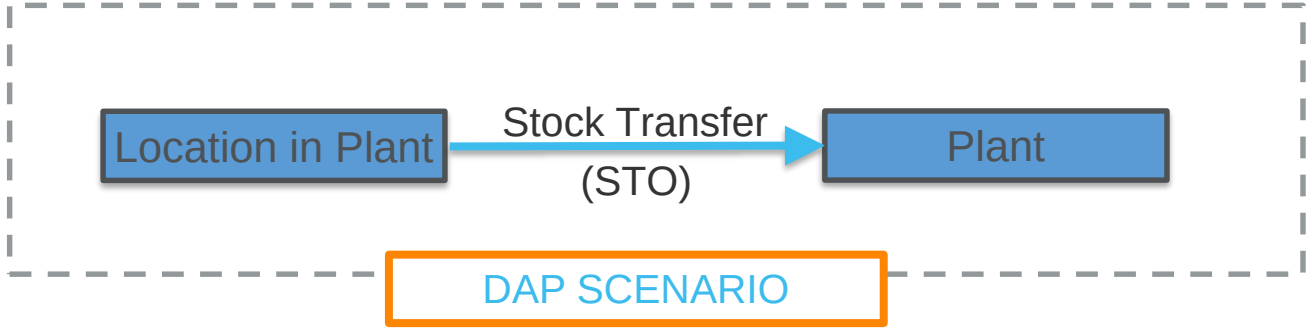
TS.07 TM STO Transportation Planner
Manages Events in TM

TS.07 TM STO Transportation Planner
Manages Events in TM

INTRA MISSION – Manage Events (DAP)

INTRA Mission Transfers **Receiving Plant** DAP

TS.07 TM Plnr
Update Events



TS.07 TM STO Transportation Planner
Manages Events in TM

TM MASTER DATA

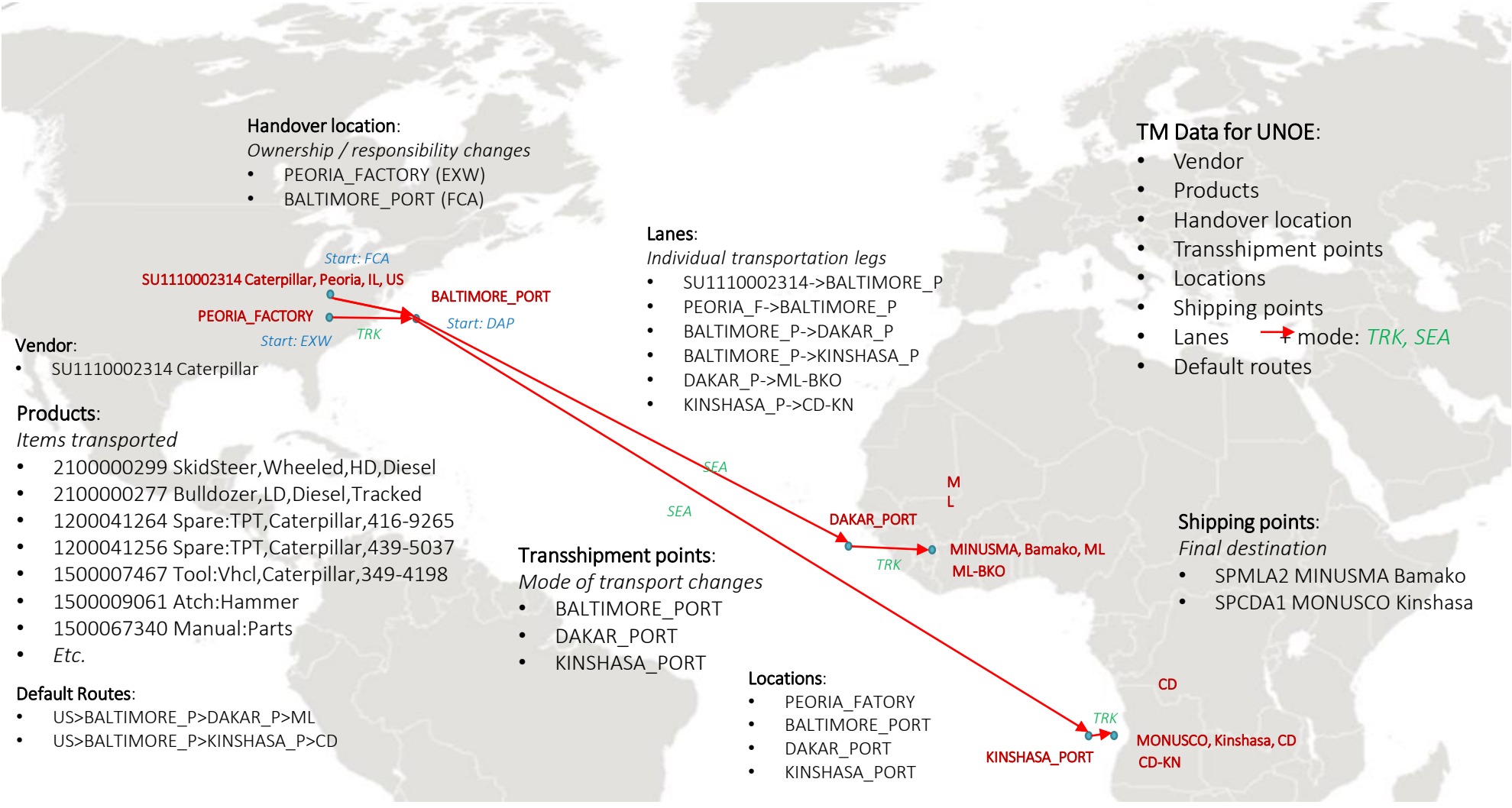
Transportation Planning and Management and Track & Trace (TPTM – T&T project)

Cyrille Momo

UCS Training Team

Tuesday, October 22, 2019

Transportation Management – Master Data Illustration



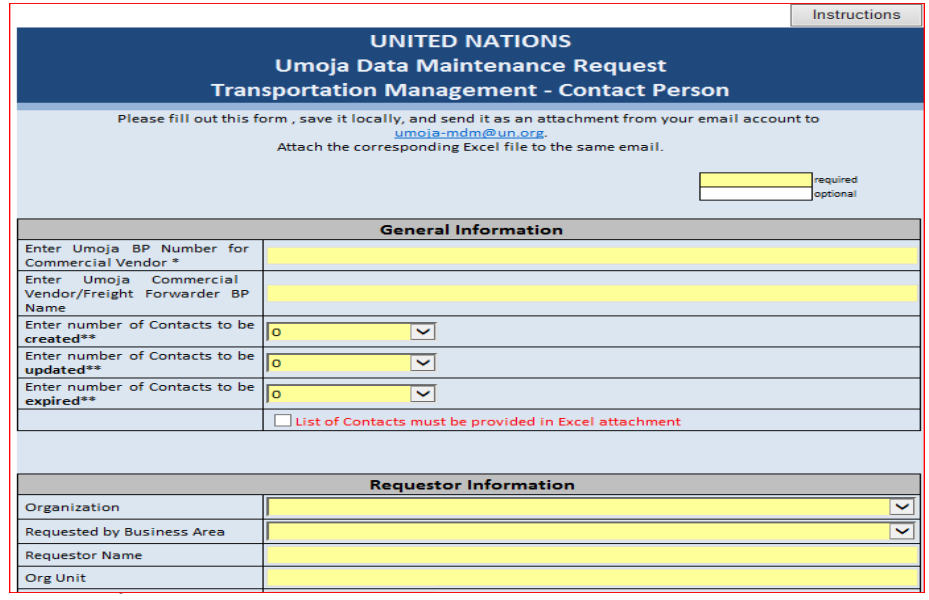
The UN has a contract with Caterpillar (BP#: 1110002314) to provide machinery for use by PK and SP missions.

- Items are purchased from the factory in Peoria, IL, US
- Items are shipped by truck, sea and truck to their final destination
- Incoterms EXW, FCA and DAP can apply to individual purchases

Request TM Master Data - Forms and Templates

All submissions are sent to umoja-mdm@un.org

For single item, submit the InfoPath form



Instructions

UNITED NATIONS
Umoja Data Maintenance Request
Transportation Management - Contact Person

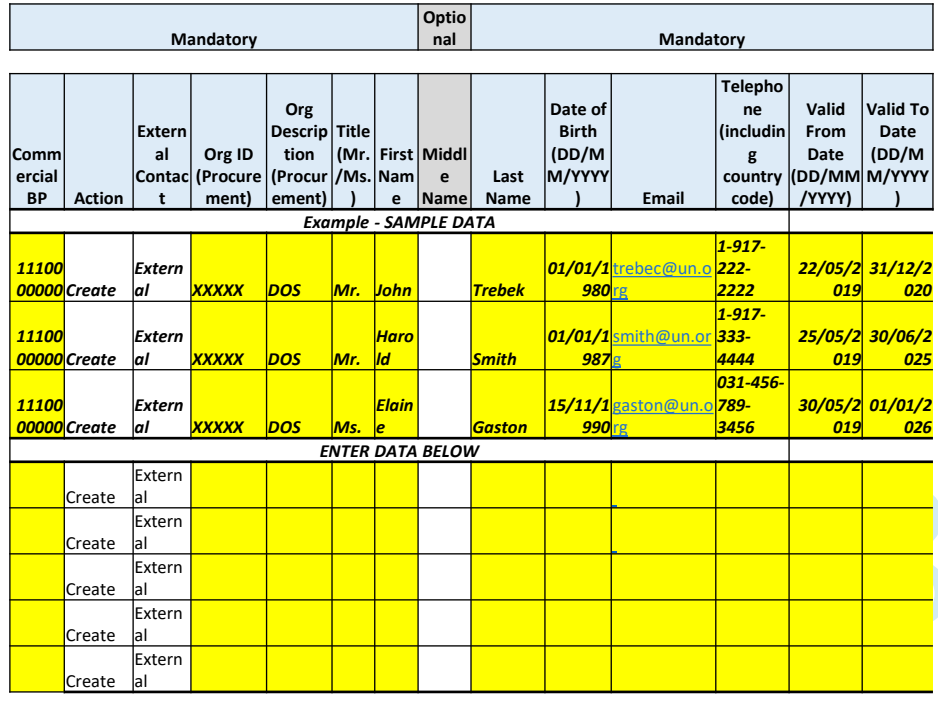
Please fill out this form , save it locally, and send it as an attachment from your email account to umoja-mdm@un.org.
Attach the corresponding Excel file to the same email.

required
optional

General Information	
Enter Umoja BP Number for Commercial Vendor *	
Enter Umoja Commercial Vendor/Freight Forwarder BP Name	
Enter number of Contacts to be **created****	0
Enter number of Contacts to be **updated****	0
Enter number of Contacts to be **expired****	0
	☐ List of Contacts must be provided in Excel attachment

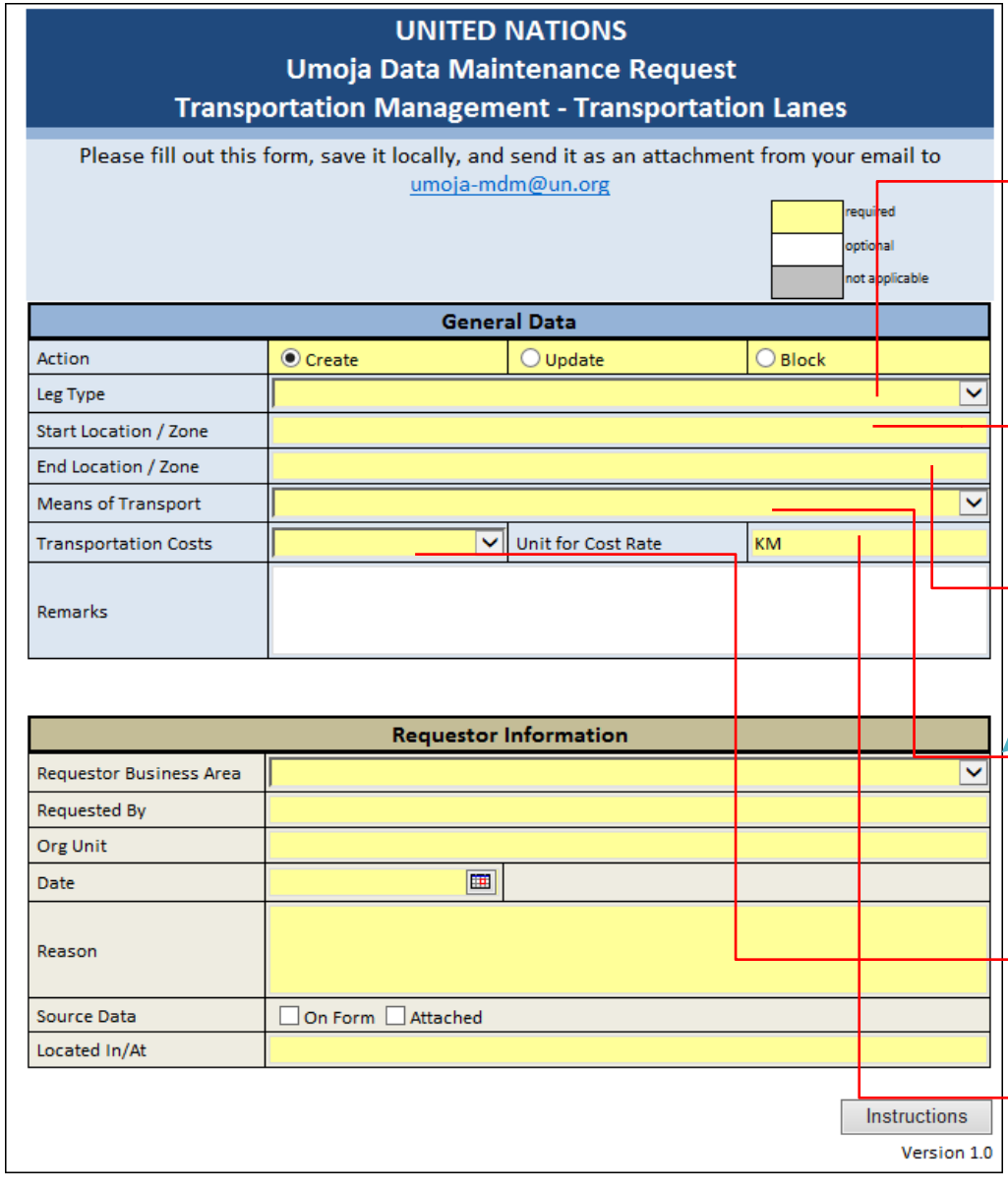
Requestor Information	
Organization	
Requested by Business Area	
Requestor Name	
Org Unit	

For multiple items, submit both the InfoPath form and the Excel template



Mandatory							Optional	Mandatory					
Commercial BP	Action	External Contact	Org ID (Procurement)	Org Description (Procurement)	Title (Mr./Ms.)	First Name	Middle Name	Last Name	Date of Birth (DD/MM/YYYY)	Email	Telephone (including country code)	Valid From Date (DD/MM/YYYY)	Valid To Date (DD/MM/YYYY)
Example - SAMPLE DATA													
11100 00000	*Create*	*External*	*XXXXX*	*DOS*	*Mr.*	*John*		*Trebek*	*01/01/1980*	*trebec@un.org*	*1-917-222-2222*	*22/05/2019*	*31/12/2020*
11100 00000	*Create*	*External*	*XXXXX*	*DOS*	*Mr.*	*Harold*		*Smith*	*01/01/1987*	*smith@un.org*	*1-917-333-4444*	*25/05/2019*	*30/06/2025*
11100 00000	*Create*	*External*	*XXXXX*	*DOS*	*Ms.*	*Elaine*		*Gaston*	*15/11/1990*	*gaston@un.org*	*031-456-789-3456*	*30/05/2019*	*01/01/2026*
ENTER DATA BELOW													
	Create	External											
	Create	External											
	Create	External											
	Create	External											
	Create	External											

Transportation Lanes



UNITED NATIONS
Umoja Data Maintenance Request
Transportation Management - Transportation Lanes

Please fill out this form, save it locally, and send it as an attachment from your email to umoja-mdm@un.org

required
optional
not applicable

General Data

Action	Create	Update	Block
Leg Type			
Start Location / Zone			
End Location / Zone			
Means of Transport			
Transportation Costs		Unit for Cost Rate	KM
Remarks			

Requestor Information

Requestor Business Area	
Requested By	
Org Unit	
Date	
Reason	
Source Data	On Form Attached
Located In/At	

Instructions

Version 1.0

PRE - initial leg of transportation prior to sea or air, from vendor, factory, COE pickup location or mission to a port, airport or factory
MAIN - air-air, or port-port transportation leg
ON - final leg from port or airport of arrival to the destination location or zone

Zone: ML_BKO (Mali, Bamako) or Location id: DAKAR_PORT

Same; valid location or zone

Means of transport: UNOE_TRK, UNOE_SEA, UNOE_AIR

Values go from 1 to 999

Unit is in Km

Create - Contact Person

Mandatory							Optional	Mandatory					
Commercial BP	Action	External Contact	Org ID (Procurement)	Org Description (Procurement)	Title (Mr./Ms.)	First Name	Middle Name	Last Name	Date of Birth (DD/MM/YYYY)	Email	Telephone (including country code)	Valid From Date (DD/MM/YYYY)	Valid To Date (DD/MM/YYYY)
Example - SAMPLE DATA													
1110000000	*Create*	*External*	*XXXXX*	*DOS*	*Mr.*	*John*		*Trebek*	*01/01/1980*	trebec@un.org	*1-917-222-2222*	*22/05/2019*	*31/12/2020*
1110000000	*Create*	*External*	*XXXXX*	*DOS*	*Mr.*	*Harold*		*Smith*	*01/01/1987*	smith@un.org	*1-917-333-4444*	*25/05/2019*	*30/06/2025*
1110000000	*Create*	*External*	*XXXXX*	*DOS*	*Ms.*	*Elaine*		*Gaston*	*15/11/1990*	gaston@un.org	*031-456-789-3456*	*30/05/2019*	*01/01/2026*
ENTER DATA BELOW													
	Create	External											
	Create	External											
	Create	External											
	Create	External											
	Create	External											

CCP

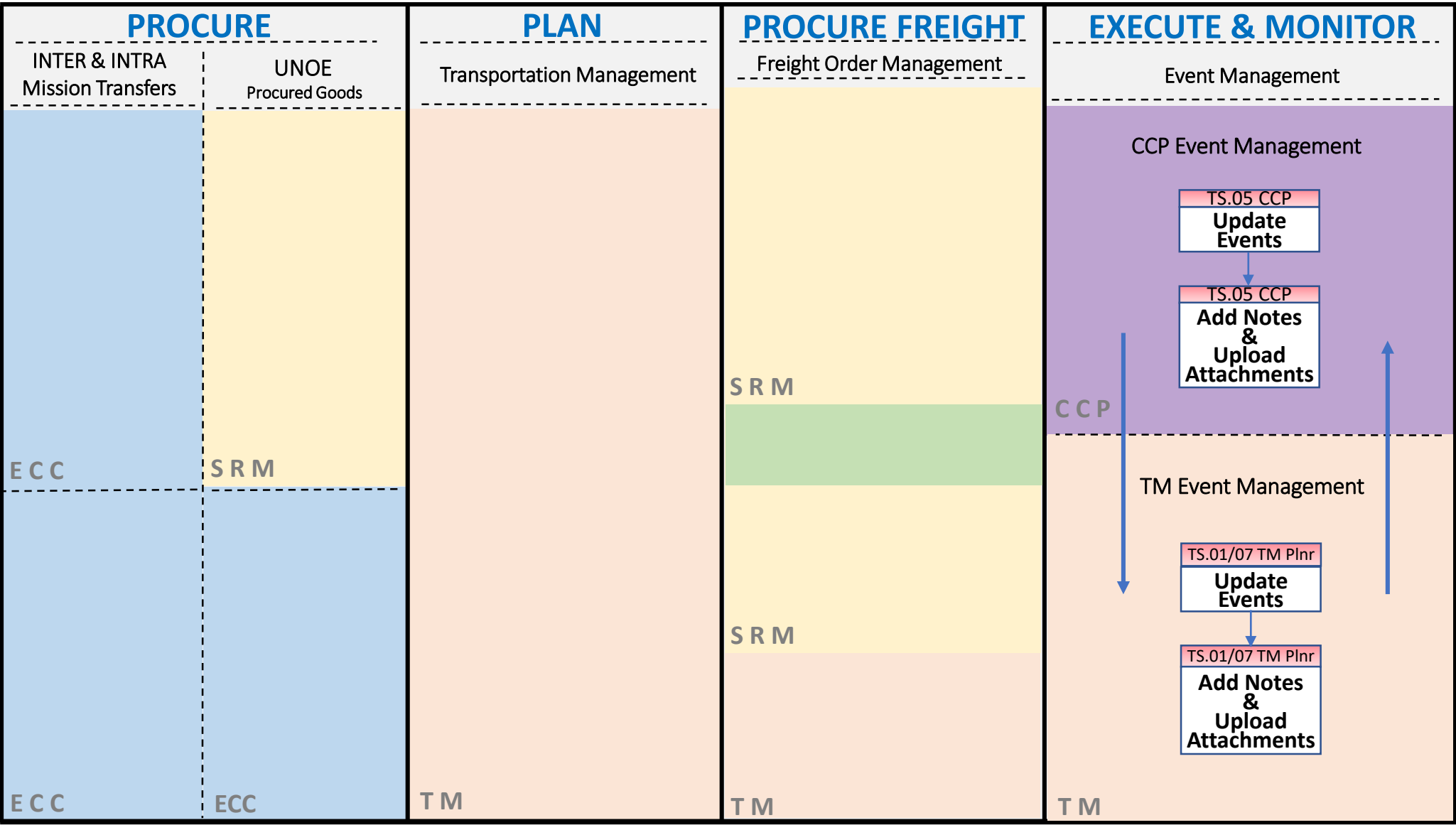
Transportation Planning and Management and Track & Trace (TPTM – T&T project)

Bryan Barrachina
Valentina Barca

UCS Training Team

Tuesday, October 22, 2019

DEPARTMENT OF OPERATIONAL SUPPORT



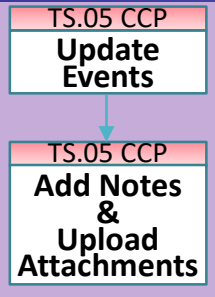
COLLABORATION PORTAL ROLES

TS.05 COLLABORATION PORTAL

The TS.05 Collaboration Portal enterprise role is provided to enable access to on Carrier Collaboration Portal (CCP) to perform the following:

- Query the Freight Order
- Submit/ Review and Display events corresponding to the Freight Order
- The CCP is web-based. As a technical pre-requisite, the TS.05 Collaboration Portal user requires internet access to be able to login and use the CCP.

CCP – EXECUTE & MONITOR PHASE



- The Carrier Collaboration Portal (CCP) allows Carriers (Vendors/Freight Forwarders) to update information about the Freight Orders they are responsible for the Transportation.

- Vendors and Freight Forwarders are provided with login credentials for the Umoja Carrier Collaboration Portal.

- They will be able to submit Expected and Unexpected Events, add **Notes** and upload **Attachments**:
  - ✓ Examples of **Events Planned**: Loading Start/End, Departure, Arrival, etc.
  - ✓ Examples of **Events Unexpected**: Delay, Damage, etc.
  - ✓ Examples of **Attachments**: Packing List, Bill of Lading, Proof of Delivery, etc.
  - ✓ Examples of **Notes**: Loading Successful

- All Events/Attachments submitted via CCP are displayed in TM.

- In case the Carrier cannot connect to CCP, Umoja role "**TS.01/07 TM Planner**" can update the related events/attachments directly in the TM module. These Events/Attachments will also be displayed in CCP

- Once the first event is submitted, the FO execution status changes to "**In Execution**". No changes in the route are further allowed

CCP – EXECUTE & MONITOR PHASE - NAVIGATION

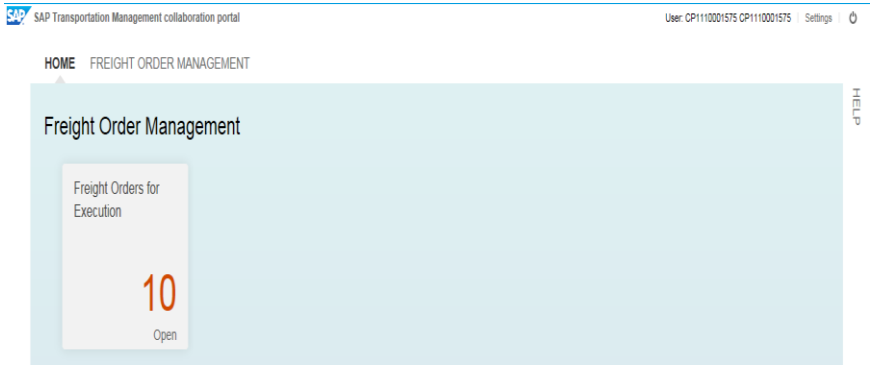
TS.05 CCP
Update Events

TS.05 CCP
Add Notes & Upload Attachments

C C P

Navigating the Carrier Collaboration Portal

- The Home page of the Carrier Collaboration Portal (CCP) shows the number of FOs ready for Execution.
- In this case there are 10 FOs we can report Events for. These FOs are in 'Open' status.
- Clicking on the Box with open FO or select the tab 'Freight Order Management' allows the user to navigate through the list of the FOs.



CCP – EXECUTE & MONITOR PHASE - NAVIGATION

TS.05 CCP
Update Events

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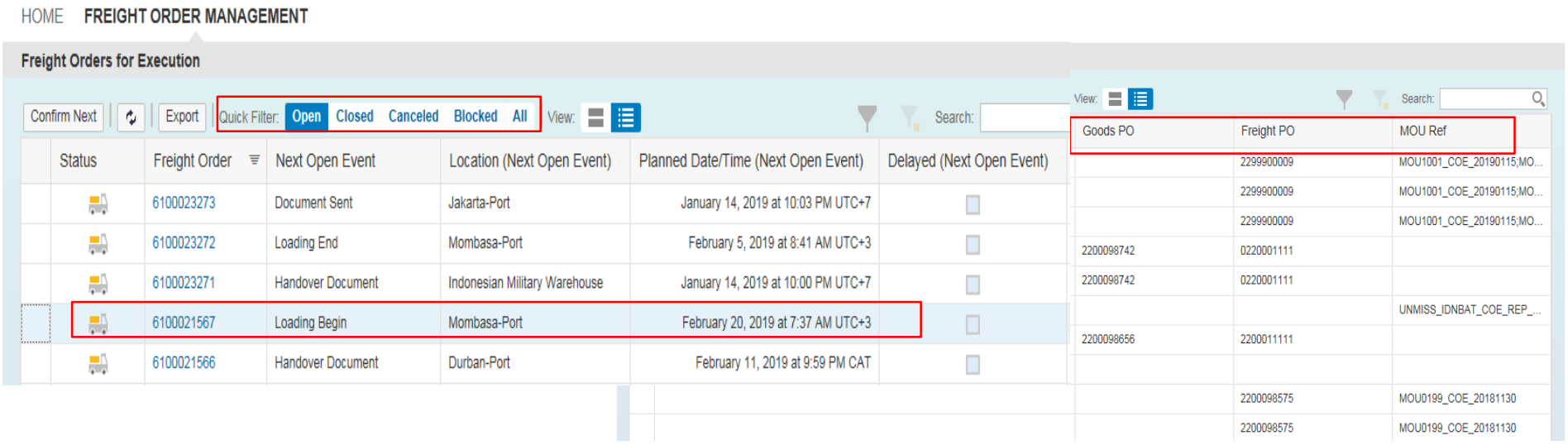
Add Notes & Upload Attachments

C C P

Navigating the Carrier Collaboration Portal

- FOs can be sorted as Open, Closed, Cancelled and Blocked.
- For each FO, The Freight Order Management tag displays all the information linked to it, including the Goods PO numbers, Freight PO numbers and MOU Reference Numbers.



CCP – EXECUTE & MONITOR PHASE – ADD NOTES

TS.05 CCP
Update Events

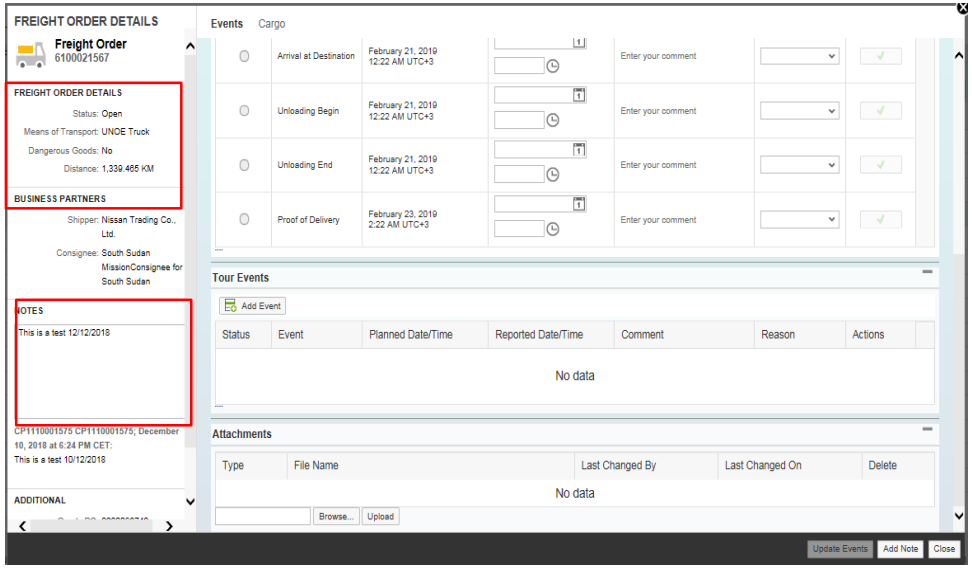
TS.05 CCP
Add Notes & Upload Attachments

C C P

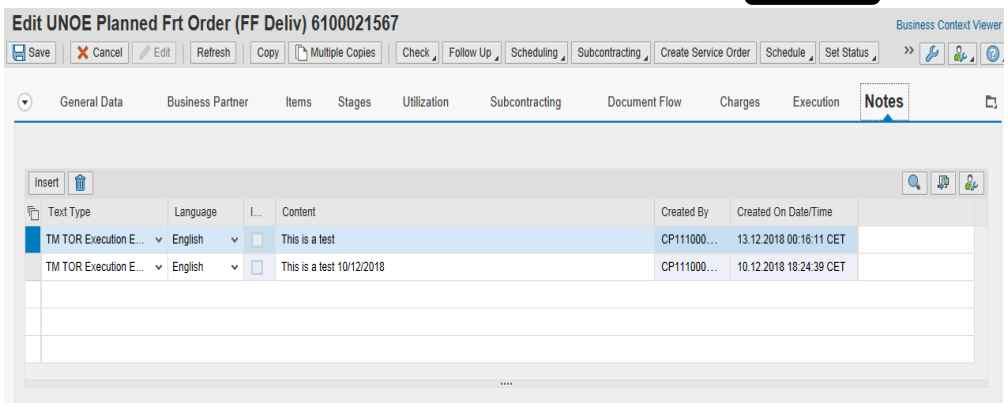
Adding Note to a selected FO

- Once we select the FO, the system opens a window with information such as FO status, Means of Transport, Business Partner, etc.
- A 'Notes' box is available for communication between CCP (Good Vendors/Freight Forwarders) and TM (TM planner). The notes will be visible in the 'Notes' tag for the selected FO in TM.

CCP



TM



CCP – EXECUTE & MONITOR PHASE – ATTACHMENTS

TS.05 CCP
Update Events

TS.05 CCP
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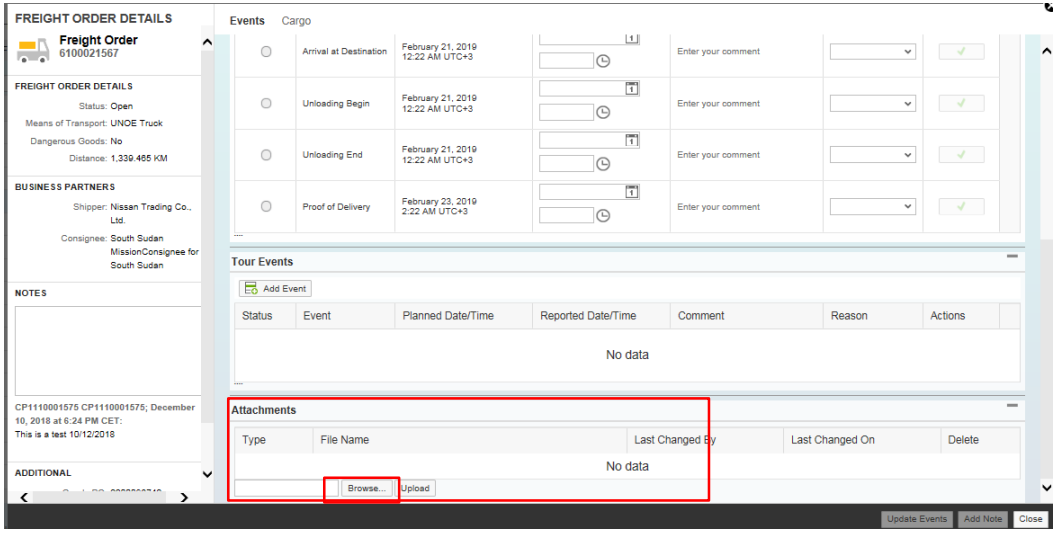
C C P

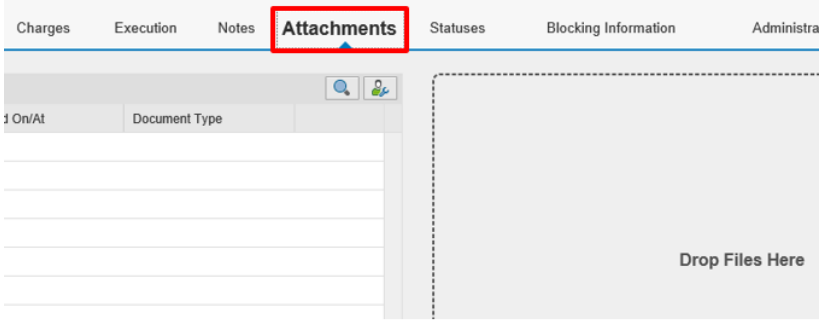
Attaching a Document to a selected FO

- In order to attach a document in CCP, the user will click on 'Browse', at the bottom of the page, select the document an upload.
- The document will be visible in the 'Attachment tag' for the selected FO in TM.

TM

CCP





CCP – EXECUTE & MONITOR PHASE - EVENTS

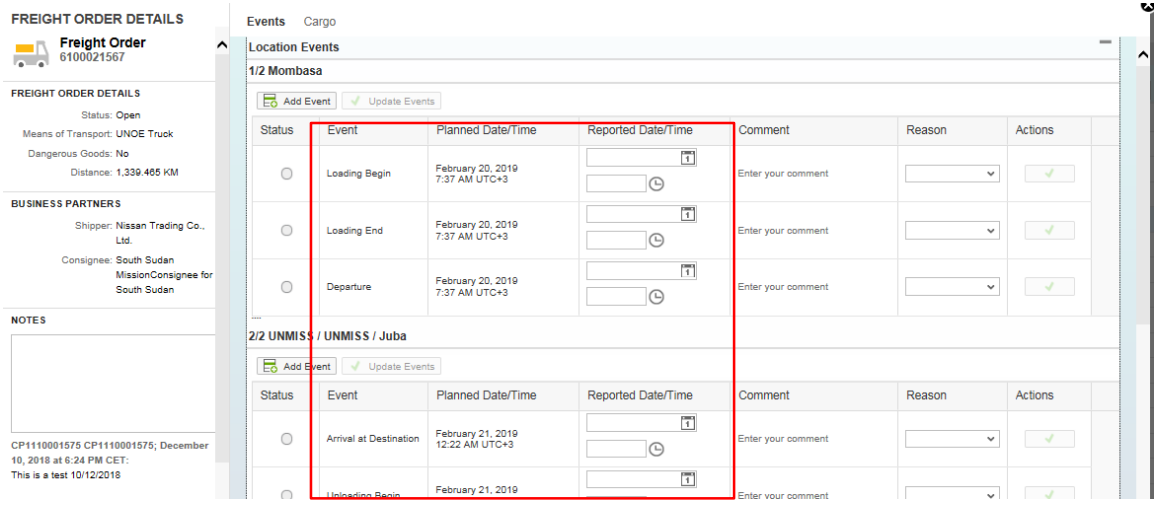
TS.05 CCP
Update Events

TS.05 CCP
Add Notes & Upload Attachments

C C P

How to Submit an Expected Event in CCP

- Once we select the FO, the system opens a window with information displaying event details for Expected Events at each location.



CCP – EXECUTE & MONITOR PHASE - EVENTS

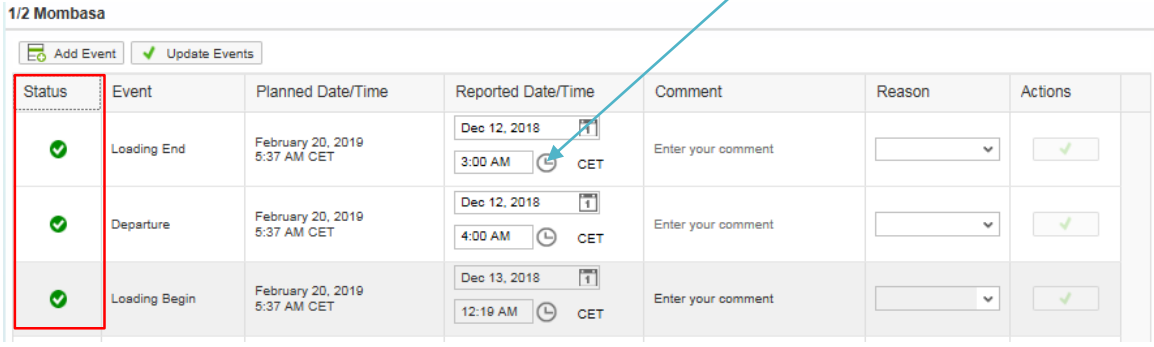
TS.05 CCP
Update Events

TS.05 CCP
Add Notes & Upload Attachments

C C P

How to Submit an Expected Event in CCP

- To report on an **Expected Event** the user can simply add 'Date' and 'Time' for the Event to report. (i.e. Loading End)
- In this case a green checkmark will appear under the Status Column.



CCP – EXECUTE & MONITOR PHASE - EVENTS

TS.05 CCP
Update Events

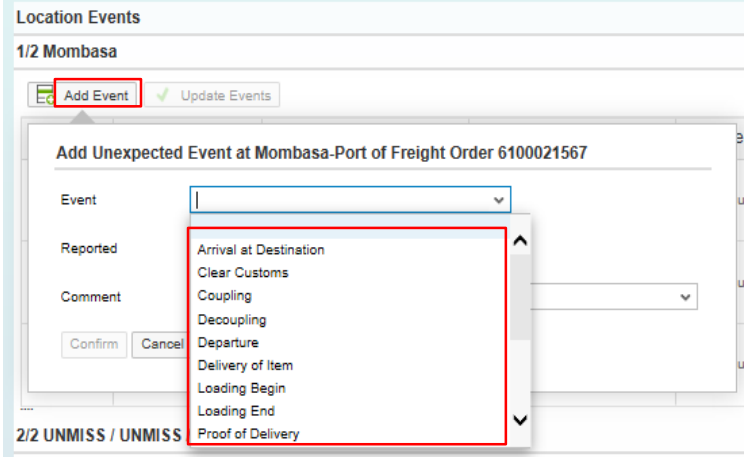
TS.05 CCP
Add Notes & Upload Attachments

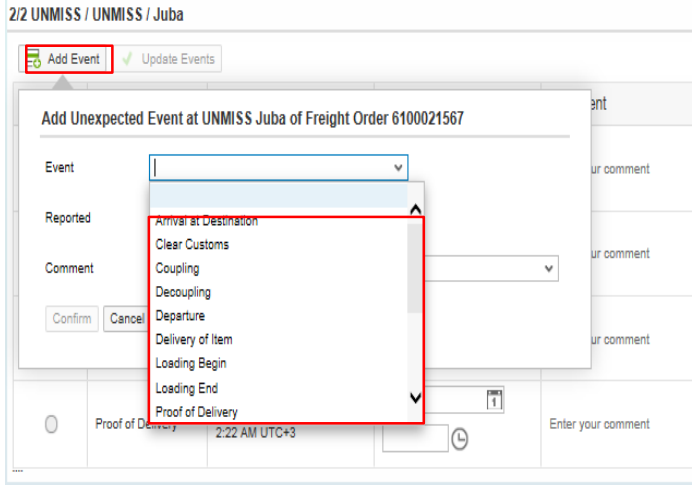
C C P

How to Submit an Unexpected Event in CCP

- An Unexcepted Event at Departure or Arrival Location can be reported by clicking on 'Add Event'. The following process can also be followed to report an Expected Event.

- Once the user clicks on 'Add Event', a drop-down menu of possible Events opens for the Departure and Arrival locations of the FO.





CCP – EXECUTE & MONITOR PHASE - EVENTS

TS.05 CCP
Update Events

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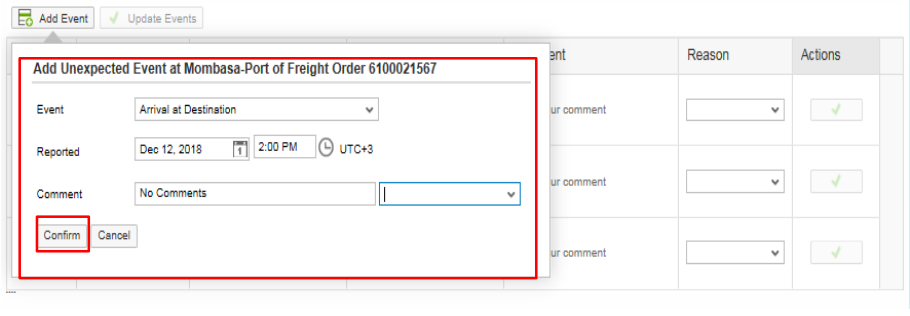
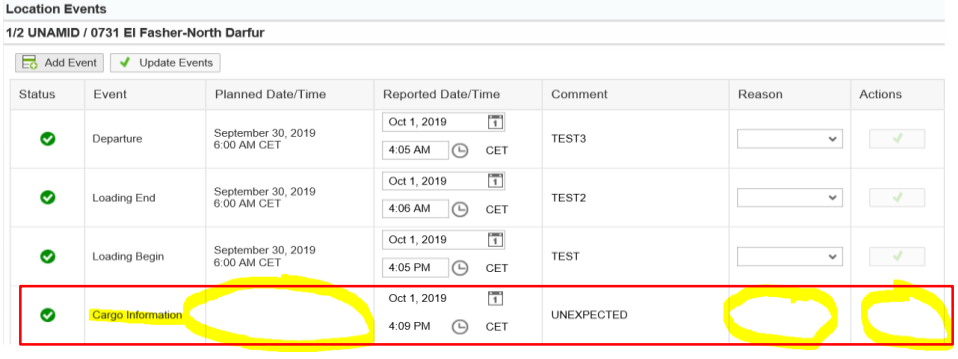
C C P

How to Submit an Unexpected Event in CCP

- Once Event is selected and 'Date' and 'Time' stated, the user will click on 'Confirm'

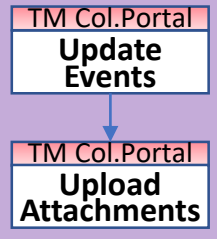


- The Expected or Unexpected Event will be updated. CCP will flag the transaction with a green checkmark under the Action Column.



Note: The **Tour of Events** section in CCP allows Carriers to submit Unexpected events that occurred during travel from one location to another.

CCP – EXECUTE & MONITOR PHASE -NOTIFICATIONS



Email notifications are sent automatically when some **specific events** are **reported** or **overdue**:

- **Planned Events**:
  - ✓ "**Handover document**" event:
    - When the event is reported an email is sent to the R&I contact in the destination Plant
    - If the event is overdue more than **48 hours** *(from the planned date)* an email is sent to MovCon.
  - ✓ "**Documentation Sent**" event *(only for "main carriage" leg)*:
    - When the event is reported an email is sent to the R&I contact in the destination Plant
    - If the event is overdue more than **10 days** *(from the planned date)* an email is sent to MovCon.
  - ✓ "**Documentation Complete**" & "**Custom Clearance**" events *(only for "main carriage" leg)*:
    - If the event is overdue more than **10 days** *(from the planned date)* an email is sent to MovCon.
- **Unexpected Events**:
  - ✓ An email notification to the TM Planner, Requisitioner and R&I is sent when any of this type of events is reported *(delay, damage, loss, etc.).*
  - ✓ Procurement Division will also be notified in case the unexpected event is either "Cost Change" or "Route Change"

THANK YOU!

Questions?