



**User  
Guide**

# **Transportation Management User Guide**

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## Read this first

The below reading guide should help the user to determine which section(s) of this guide are most relevant per user function and how to easiest find the right section(s). It is not necessary to read each chapter of the guide, depending on the responsibility in TM a few chapters might be sufficient.

For **Transportation Planners** it is recommended to read:

Chapter 1 - 4 – if planning for **UNOE shipments**. Focus on UNOE relevant sections for chapter 1 - 2. In chapter 8 focus on the FO deletion and different status parts. Chapter 9 is optional but 'How to request Master Data' is needed in case locations/lanes are missing during planning process. Chapter 10 – 12.

Chapter 1 – 3 + **chapter 5** – if planning for **STO shipments**. Focus on STO relevant sections for chapter 1 - 2. In chapter 8 focus on the FO deletion and different status parts. Chapter 9 is optional but 'How to request Master Data' is needed in case locations/lanes are missing during planning process. Chapter 10 – 12.

Chapter 1 – 3 + **chapter 6** – if planning for **COE shipments**. Focus on COE relevant sections for chapter 1 - 2. In chapter 8 focus on the FO deletion and different status parts. Chapter 9 is optional but 'How to request Master Data' is needed in case locations/lanes are missing during planning process. Chapter 10 – 12.

Chapter 1 – 3 + **chapter 7** – if planning for **Troops movements**. Focus on Troops relevant sections for chapter 1 - 2. In chapter 8 focus on the FO deletion and different status parts. Chapter 9 is optional but 'How to request Master Data' is needed in case locations/lanes are missing during planning process. Chapter 10 – 12.

For **Freight Buyers** it is recommended to read:

Chapter 1 – 3, **8**, Chapter 9 is optional but 'How to request Master Data' is needed in case locations are missing during FO update. Chapter 10 – 12.

For **Inbound Coordinators** it is recommended to read:

Chapter 3, 10, and 12.

## Chapter 1. TM and Track & Trace Overview – High Level End-to-End Processes

The SAP modules for Transportation Management (TM) and Event Management (EM) were implemented to plan, execute and monitor goods shipments and passenger movements for the UN. TM offers the possibility to consolidate shipments, optimize routing and transport mode choice, end-to-end visibility of freight and passenger movements.

The EM module or Track & Trace was implemented to provide near real-time transportation movement updates and active collaboration with goods vendors and freight forwarders.

For optimized reporting, TM is connected to Business Intelligence (BI). Detailed reports exist for inbound and outbound freight and passenger movements. Goods vendor and Freight Forwarder performance can be monitored. Through shipment/movement measurement and reporting, opportunities and challenges can be identified, and the transportation and logistics strategy could be adapted accordingly.

Long-term, TM shall contribute to standardized and streamlined logistics functions, optimized inventory levels, and reduced safety stocks. Furthermore, logistics cost should be reduced, and the customer service improved.

TM is used for the below described processes to plan transportation, manage execution, and track the shipment/movement from start to end.

### Scope

All goods purchases from global contracts are in scope for the entities that have been onboarded to TM. For regional and local vendors, it depends on the entity/entities using those vendors if they should be TM relevant. If a regional/local vendor is used by more than one entity, it needs to be agreed among those entities if those vendor(s) should be TM relevant. If deemed TM relevant all purchase orders respectively the belonging inbound deliveries will be transferred to TM.

For Stock Transfer Orders (STO) any current or new mission is automatically in scope.

**Phase 1 go-live:** 21. January 2019 included:

- UNOE (vehicles ONLY),
- COE and Troops movement from UN HQ (MovCon);

**Phase 2 go-live:** 2. December 2019 (37 entities as per below screenshot) included:

- UNOE- all commodities,
- Intra & Inter mission movements for UNOE (STOs),
- Long Term Charter (LTC) movements.

13 PKMs, 3 Service Centers	17 SPMs	4 OAHs
1. MINURSO	1. OSASG-BDI	1. ECA
2. MINUSCA	2. OSESGY	2. ECLAC
3. MINUSMA	3. UNMHA	3. ESCWA
4. MONUSCO	4. OSE-Syria	4. UNON
5. UNAMID	5. UNAMA	
6. UNDOF	6. UNAMI	
7. UNFICYP	7. UNITAD	
8. UNIFIL	8. UNIOGBIS	
9. UNISFA	9. UNOAU	
10. UNMIK	10. UNOCA	
11. UNMISS	11. UNOWAS	
12. UNMOGIP	12. UNRCCA	
13. UNSOS	13. UNTSO	
	14. UNSCO	
14. RSCE	15. UNSCOL	
15. UNGSC	16. UNSMIL	
16. UNSB-V	17. UNVMC	

Further entities such as BINUH, UNITAMS, and ESCAP were onboarded in the last quarter of 2020 and first quarter of 2021.

### United Nations Owned Equipment (UNOE) Shipments

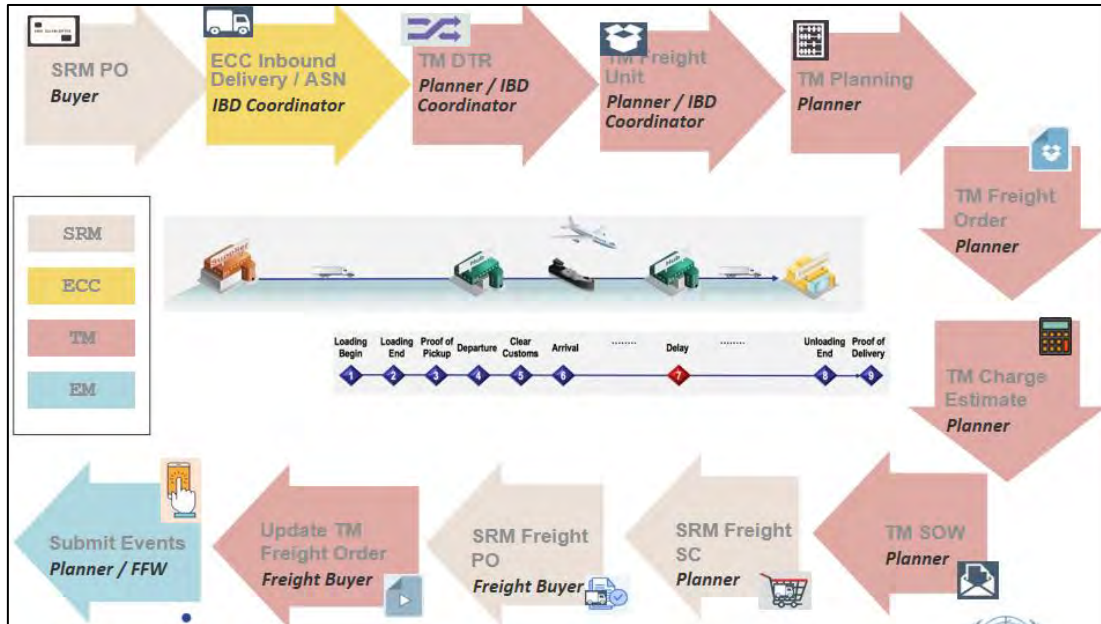
A goods purchase order is placed in SRM and then transferred to ECC when the UN acquires new supplies, materials, equipment, etc.. Depending on the Incoterm of the PO, the UN might need to organize the goods transportation or parts of it to the receiving UN entities. For POs, where the UN is involved in the transportation organization, TM is used to plan the route, generate the SOW, and estimate freight charges. After solicitation the carrier and actual freight cost are maintained in TM as well as location/date updates (if applicable). Afterwards, the shipping can be tracked in TM. For DAP or DAP like shipments, TM is used for tracking & tracing.

**Goods purchases from system contracts:** Shipments related to purchases from system contracts are by default TM relevant. This means that Inbound Deliveries for such purchase orders are automatically transferred to TM.

**Goods purchases from regional/local contracts:** Shipments related to goods purchases from regional or local contracts are only upon request TM relevant. If a new goods vendor should be TM relevant it has to be confirmed with other missions/entities if the goods vendor is used and if it is desired to plan and track & trace such shipments in TM. Only after agreement among all entities that use the same local/regional goods vendor, the vendor will be set to be TM relevant.



## General UNOE process flow



- **SRM PO:** The SRM Goods Purchase Order (PO) is cut and needs to have a valid Incoterm and an Incoterm location chosen from the dropdown. For DAP and EXW the Incoterm location can be entered as free text. It is also important that the delivery address is chosen from the dropdown menu and not manually adjusted. If a delivery address is missing, it should be requested. All PO lines should have PIDs otherwise the subsequent inbound delivery cannot be sent to TM.
- **ECC Inbound Delivery:** After the Purchase Order was released in SRM it is replicated in ECC. An automatic job creates currently the Inbound Deliveries (IBD) automatically<sup>1</sup>. As soon as the IBD is created it gets transferred to TM and creates a DTR. To reflect the shipment requirement as accurate as possible the IBD products needs to be packed into Handling Units (HU) in ECC and dimensions, weight, and volume need to be updated per HU. The data are needed for the SOW in TM. The goods vendor is supposed to provide the packing information.
- **TM DTR:** The delivery-based transport requirement (DTR) is based on the ECC IBD data and replicates the shipment requirement.
- **TM Freight Unit:** The relation between DTR and Freight Unit (FU) is 1:1. A FU is a unit that ships together from origin to destination. The FU cannot be split during the transport.
- **TM Planning:** The transportation cockpit is used to carry out the shipment planning based on the FUs that are unplanned.  
For DAP shipments the planning in TM is carried out automatically, for all other shipments where the UN has responsibility to organize (parts of) the transport, the transportation planner needs to act on the open shipment requirements (FUs) in TM.

<sup>1</sup> This will change as soon as a goods vendor is connected through EDI. Then the goods vendor would initiate the Advance Shipping Notification (ASN) which will create the Inbound Delivery in ECC.

- **TM Freight Order:** As the result of transportation planning in TM, Freight Orders are created based on the route chosen and by means of transport. Different Freight Orders are created for truck, sea, and/or air shipment legs.
- **TM Charge Estimate:** While creating the Freight Orders the system estimates charges if stored in TM for the shipment leg. The system pulls the rate from the charge table and calculates the estimated charges (usually by cbm). If no estimated charges are stored in the system, the transportation planner is expected to update the estimated charges for each Freight Order of the shipment.
- **TM SOW:** The SOW is automatically available when the Freight Orders get created. The SOW is generated for Freight Orders where the UN is responsible for transportation planning. The SOW can be accessed from each Freight Order for the same shipment where the UN is responsible for transport planning (not from the vendor leg, where the goods vendor is responsible for the transport). The pdf SOW should be downloaded from TM and opened in MS Word for modification. The final SOW needs to be reuploaded under 'attachments' in TM.
- **SRM Freight SC:** After the SOW is finalized, the Freight Shopping Cart is created for non-DAP shipments in SRM. The TM SOW needs to be attached.
- **SRM Freight PO:** After freight solicitation/spot bidding process, the SRM Freight Purchase Order is created.
- **Update TM Freight Order:** The freight buyer updates the TM Freight Order(s) with the freight carrier, the SRM freight PO and any necessary location and/or date changes.
- **Submit Events:** The goods vendor/freight forwarder and/or UN staff is expected to submit expected and unexpected events for each shipment to allow each stakeholder an up-to-date view on the shipment execution. External partners use the Carrier Collaboration Portal (CCP) to submit events. UN staff updates events directly in TM under FO 'Execution'.

## Stock Transfer Orders (STO) Shipments

In Umoja, the transferring of supplies, materials, and equipment is accomplished through the **Stock Transport Order (STO) process**. The STO is a special procurement type that is used to transfer goods from one mission to another mission. The STO is used to capture costs, collect funding from the requesting mission, track the shipment, and make accounting postings. When an entity requires supplies, it will likely check its own inventory first. If the items are not available in its own inventory, the requirement can be satisfied through several sources, such as:

- SDS strategic deployment of stock
- UN Reserve
- Inter-mission Transfer (i.e. surplus items)
- Within-Mission Transfer

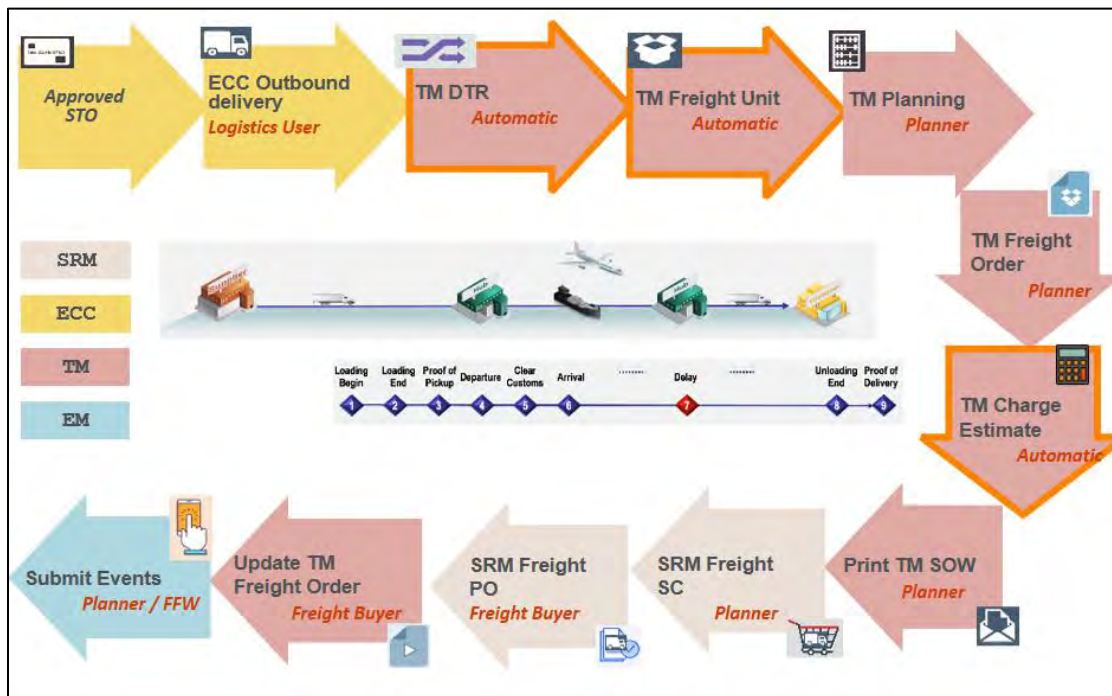
In the cases of sourcing through SDS and Inter-mission transfer some costs may be incurred by the requesting mission such as: replacement cost, conversion cost, etc., which need to be paid; these cases are considered "budget relevant".

In the cases of UN Reserve, Inter-Mission Transfer with no costs, and Within-Mission Transfer, no costs may be involved in the transfer of goods; these cases are considered "non-budget relevant". Please refer to <https://umoja.un.org/content/job-aids> for available STO job aids.

**Stock Transfer Orders between entities (inter):** In the case of an Inter mission STO, the Global Supply Chain Coordinator (GSCC) will create the STO.

**Stock Transfer Orders within same entity (intra):** In the case of an Intra mission STO, the Local Supply Chain Coordinator (LSCC) will create the STO.

### General STO Process Flow



- **Approved STO:** The ECC STO needs to have a valid Incoterm and Incoterm location. For STOs three Incoterms were set up, EXW, DAP, and FCA. For DAP and EXW the Incoterm location is free text. For FCA, which covers all shipments that change transportation responsibility at a handover location along the route, the Incoterm location must be chosen from the dropdown menu.
- **ECC Outbound Delivery:** After the Purchase Order is approved in ECC, an outbound delivery (OBD) can be created. As soon as the OBD is created it gets transferred to TM and creates a DTR. To reflect the shipment requirement as accurate as possible the OBD needs to be packed into Handling Units (HU) in ECC and dimensions, weight, and volume need to be updated per HU. The data are needed for the SOW in TM.
- **TM DTR:** The delivery-based transport requirement (DTR) is based on the ECC OBD data and replicates the shipment requirement.
- **TM Freight Unit:** The relation between DTR and Freight Unit (FU) is 1:1. A FU is a unit that ships together from origin to destination. The FU cannot be split during the transport.

- **TM Planning:** The transportation cockpit is used to carry out the shipment planning based on the FUs that are unplanned.  
For all STO shipments the UN has responsibility to organize the transport including DAP. The transportation planner needs to act on the open shipment requirements (FUs) in TM and choose an appropriate route.
- **TM Freight Order:** As the result of transportation planning in TM, Freight Orders are created based on the route chosen and by means of transport. Different Freight Orders are created for truck, sea, and/or air shipment legs.
- **TM Charge Estimate:** While creating the Freight Orders the system estimates charges if stored in TM for the shipment leg. The system pulls the rate from the charge table and calculates the estimated charges (usually by cbm). If no estimated charges are stored in the system, the transportation planner is expected to update the estimated charges for each Freight Order of the shipment.
- **TM SOW:** The SOW is automatically available when the Freight Orders get created. The SOW is generated for Freight Orders where the UN is responsible for transportation planning. The SOW can be accessed from each Freight Order for the same shipment where the UN is responsible for transport planning (not from the vendor leg, where the goods vendor is responsible for the transport). The pdf SOW should be downloaded from TM and opened in MS Word for modification. The final SOW needs to be reuploaded under 'attachments' in TM.
- **SRM Freight SC:** After the SOW is finalized, the Freight Shopping Cart is created for non-DAP shipments in SRM. The TM SOW needs to be attached.
- **SRM Freight PO:** After freight solicitation/spot bidding process, the SRM Freight Purchase Order is created.
- **Update TM Freight Order:** The freight buyer updates the TM Freight Order(s) with the freight carrier, the SRM freight PO and any necessary location and/or date changes.
- **Submit Events:** The goods vendor/freight forwarder and/or UN staff is expected to submit expected and unexpected events for each shipment to allow each stakeholder an up-to-date view on the shipment execution. External partners use the Carrier Collaboration Portal (CCP) to submit events. UN staff updates events directly in TM under FO 'Execution'.

### Contingent Owned Equipment (COE) Shipments

Contingent Owed Equipment (COE) shipments can be uploaded in TM directly. No base document exists in ECC. Non-LOA shipments, where the UN organizes and monitors the transport are captured in TM as well as LOA shipments, where the TCC/PCC organizes and executes the transport.

Non-LOA shipments are captured under Incoterm EXW and the responsible UN staff must plan the transportation in TM. LOA shipments are captured under Incoterm DAP and the Freight Orders are generated automatically in TM with TCC/PCC automatically assigned as the carrier.

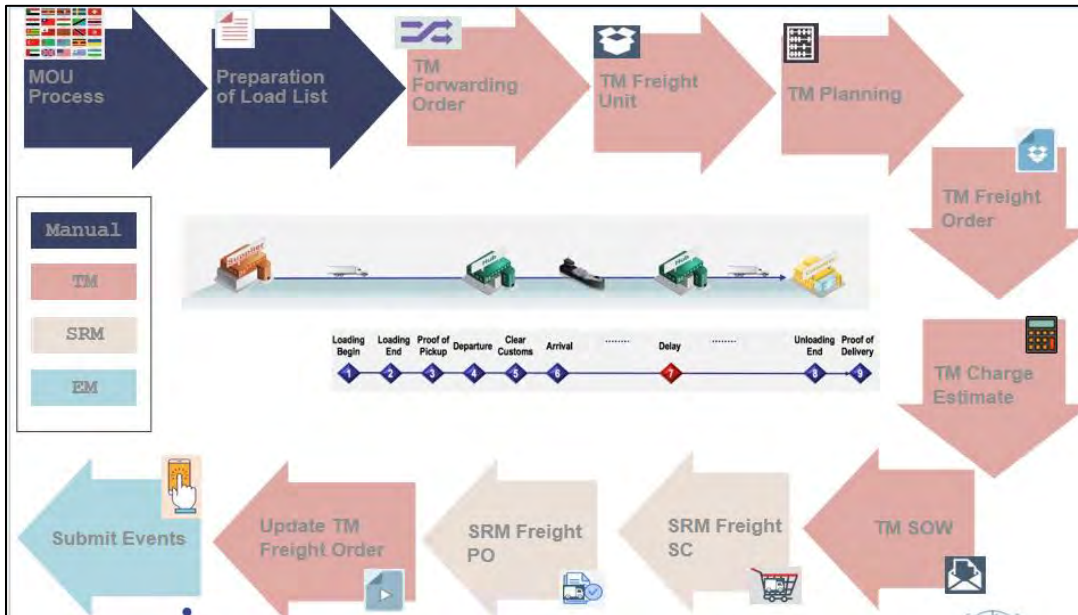
**Strategic Movements:** Strategic movements for COE shipments are usually planned and monitored by MovCon HQ.

- **Deployments:** Shipments that originate at a TCC/PCC and are transported into a mission.
- **Rotations:** Shipments that have an ingoing (into a mission) and outgoing (from mission to TCC/PCC) movement.
- **Repatriations:** Shipments that originate in a mission and are transported back to the TCC/PCC.

**Tactical Movements:** Movements within the missions and between missions are usually planned and monitored by local MovCon colleagues.

- **Intra-mission movements:** Shipments within the same mission. Sending and receiving mission are the same.
- **Inter-mission movements:** Shipments between missions. Sending and receiving mission are different.

### COE Process flow



- **MOU Process:** A Memorandum of Understanding (MOU) is agreed between TCC/PCC and UN.
- **Preparation of Load List:** With the final load list summary available the upload file for TM is prepared. Goods to be moved are categorized into containers, vehicles, trailers, and break bulk. If needed they could also be classified as dangerous goods.
- **TM Forwarding Order:** The Forwarding Order (FWO) is based on the cargo summary load list data and represents the shipment requirement.
- **TM Freight Unit:** The relation between FWO and Freight Unit (FU) is 1:1. A FU is a unit that ships together from origin to destination. The FU cannot be split during the transport.
- **TM Planning:** The transportation cockpit is used to carry out the shipment planning based on the FUs that are unplanned.

For DAP (LOA) shipments the planning in TM is carried out automatically, for EXW (non-LOA) shipments where the UN has responsibility to organize the transport, the transportation planner needs to act on the open shipment requirements (FUs) in TM.

- **TM Freight Order:** As the result of transportation planning in TM, Freight Orders are created based on the route chosen and by means of transport. Different Freight Orders are created for truck, sea, and/or air shipment legs.
- **TM Charge Estimate:** While creating the Freight Orders the system estimates charges if stored in TM for the shipment leg. The system pulls the rate from the charge table and calculates the estimated charges (usually by cbm). If no estimated charges are stored in the system, the transportation planner is expected to update the estimated charges for each Freight Order of the shipment.
- **TM SOW:** The SOW is automatically available when the Freight Orders get created. The SOW is generated for Freight Orders where the UN is responsible for transportation planning. The SOW can be accessed from each Freight Order for the same shipment where the UN is responsible for transport planning. The pdf SOW should be downloaded from TM and opened in MS Word for modification. The final SOW needs to be reuploaded under 'attachments' in TM.
- **SRM Freight SC:** After the SOW is finalized, the Freight Shopping Cart is created for non-DAP (non-LOA) shipments in SRM. The TM SOW needs to be attached.
- **SRM Freight PO:** After freight solicitation/spot bidding process, the SRM Freight Purchase Order is created.
- **Update TM Freight Order:** The freight buyer updates the TM Freight Order(s) with the freight carrier, the SRM freight PO and any necessary location and/or date changes.
- **Submit Events:** The freight forwarder and/or UN staff is expected to submit expected and unexpected events for each shipment to allow each stakeholder an up-to-date view on the shipment execution. External partners use the Carrier Collaboration Portal (CCP) to submit events. UN staff updates events directly in TM under FO 'Execution'.

## Troops Movements

Troop movements can be uploaded in TM directly. No base document exists in ECC.

Non-LOA movements, where the UN organizes and monitors the move, can be captured in TM as well as LOA shipments, where the TCC/PCC organizes and executes the transport.

Non-LOA movements are captured under Incoterm EXW and the responsible UN staff must plan the transportation in TM. LOA movements are captured under Incoterm DAP and the Freight Orders are generated automatically in TM with TCC/PCC automatically assigned as the carrier.

LTC movements are also captured in TM through a mass upload tool. A separate user guide exists for the LTC process.

**Strategic Movements:** Strategic movements for Troops are usually planned and monitored by MovCon HQ.

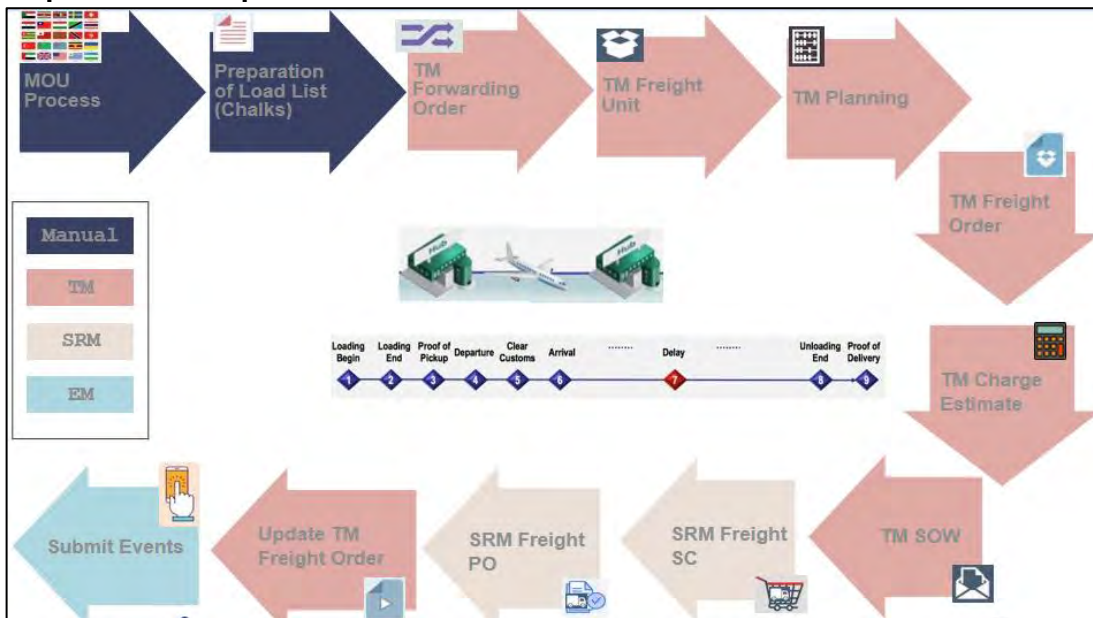
- **Deployments:** Movements that originate at a TCC/PCC and are going into a mission.

- **Rotations:** Movements that have an ingoing (into a mission) and outgoing (from mission to TCC/PCC) movement.
- **Repatriations:** Movements that originate in a mission and are going back to the TCC/PCC.

**Tactical Movements:** Movements within the missions and between missions are usually planned and monitored by local MovCon colleagues.

- **Intra-mission movements:** Movements within the same mission. Sending and receiving mission are the same.
- **Inter-mission movements:** Movements between missions. Sending and receiving mission are different.

### Troops Movement process flow



- **MOU Process:** A Memorandum of Understanding (MOU) is agreed between TCC/PCC and UN.
- **Preparation of Load List (Chalks):** With the final requirement list on the number of passengers to be moved and their baggage allowance the TM upload file is prepared. Depending on the move, inbound or outbound flights as well as positioning and deponing flights are available on the upload file. A separate upload file exists for land troop movements.
- **TM Forwarding Order:** The Forwarding Order (FWO) is based on the passenger list data and represents the movement requirement.
- **TM Freight Unit:** The relation between FWO and Freight Unit (FU) is 1:1. A FU is a unit that moves together from origin to destination. The FU cannot be split during the move.
- **TM Planning:** The transportation cockpit is used to carry out the movement planning based on the FUs that are unplanned.

For DAP (LOA) movements the planning in TM is carried out automatically, for EXW (non-LOA) movements where the UN has responsibility to organize the transport, the transportation planner needs to act on the open movement requirements (FUs) in TM.

- **TM Freight Order:** As the result of transportation planning in TM, Freight Orders are created based on the route chosen and by means of transport. Different Freight Orders are created for truck, sea, and/or air shipment legs.
- **TM Charge Estimate:** While creating the Freight Orders the system estimates charges if stored in TM for the shipment leg. The system pulls the rate from the charge table and calculates the estimated charges (usually by cbm). If no estimated charges are stored in the system, the transportation planner is expected to update the estimated charges for each Freight Order of the shipment.
- **TM SOW:** The SOW is automatically available when the Freight Orders get created. The SOW is generated for Freight Orders where the UN is responsible for transportation planning. The SOW can be accessed from each Freight Order for the same shipment where the UN is responsible for transport planning. The pdf SOW should be downloaded from TM and opened in MS Word for modification. The final SOW needs to be reuploaded under 'attachments' in TM.
- **SRM Freight SC:** After the SOW is finalized, the Freight Shopping Cart is created for non-DAP (non-LOA) shipments in SRM. The TM SOW needs to be attached.
- **SRM Freight PO:** After freight solicitation/spot bidding process, the SRM Freight Purchase Order is created.
- **Update TM Freight Order:** The freight buyer updates the TM Freight Order(s) with the freight carrier, the SRM freight PO and any necessary location and/or date updates.
- **Submit Events:** The freight forwarder and/or UN staff is expected to submit expected and unexpected events for each shipment to allow each stakeholder an up-to-date view on the shipment execution. External partners use the Carrier Collaboration Portal (CCP) to submit events. UN staff updates events directly in TM under FO 'Execution'.



## Chapter 2. Enterprise Roles & Responsibilities

Like in other Umoja systems, for TM several roles exist to enable the user to carry out their functions in TM. The roles are split by function and are assigned depending on the responsibilities of the users. The local SLO can provide guidance on the correct roles to be requested based on each entity's latest operation model.

The following roles currently exist in the Transportation Management and Track & Trace module and are available in the latest SLO workbook:

- TS.01: Planner and Execution (UNOE-Goods PO/COE/TROOPS)
- TS.02: Freight Procurement (UNOE Goods PO/COE/TROOPS)
- TS.03: TM Display All (UNOE Goods PO/COE/TROOPS)
- TS.04: TM Master Data
- TS.05: CCP Role for Vendor and Freight Forwarder Contacts
- TS.06: TM Production Support Role
- TS.07: Planner and Execution (UNOE-STO)
- TS.08: Freight Procurement (UNOE-STO)
- TS.09: TM Display All (UNOE-STO)
- TS.10: Planner and Execution (COE/Troops Intra/Inter-mission)
- TS.11: Freight Procurement (COE/Troops Intra/Inter-mission)
- TS.12: TM Display All (COE/Troops Intra/Inter-mission)
- BI.84 BI: TM EM\_Basic User
- BI.85 BI: TM EM\_Analytic User
- BI.86 BI: TM EM\_Power User

For details about BI roles please refer to [Chapter 12. Reports in BI](#).

### Mapping of Responsibilities from ECC to TM (UNOE &STO)

Responsibilities in TM are derived from purchase group and plant data in ECC. The Transportation Planning & Execution Group is derived from the transportation responsibility at the receiving plant for goods purchases and from the sending/receiving plant for STOs.

TM Organizational Structure is defined as per latest entity operational model, below is an example for UNOE, UNOE supported by GPSS, and STO.

## • MONUSCO – UNOE Scenario

SRM Purch. Grp	SRM Description	TM Sales Group	TM P&E Org	TM P&E Group	TM P&E Group Desc.	TM Freight Procurement Grp	TM Freight Proc. Desc.
141	MONUSCO Proc-1	SG_141	MONUSCO Proc-1				
142	MONUSCO Proc-2	SG_142	MONUSCO Proc-2				
143	MONUSCO Proc-3	SG_143	MONUSCO Proc-3				
144	MONUSCO Proc-4	SG_144	MONUSCO Proc-4				
145	MONUSCO Proc-5	SG_145	MONUSCO Proc-5				
146	MONUSCO Proc-6	SG_146	MONUSCO Proc-6	PE_PCD10	Planning and Execution Group CD10	PG_FCD10	FMONUSCO
148	MONUSCO Low Value	SG_148	MONUSCO Low Value				
149	MONUSCO Proc-7	SG_149	MONUSCO Proc-7				
150	MONUSCO Proc-8	SG_150	MONUSCO Proc-8				

## • MONUSCO – UNOE Scenario (Supported by GPSS)


S06	PD Gbl Pro Supp Se	X11	PD Gbl Pro Supp	PE_PCD10	P&E Group CD10	PG_FGPSS	FGPSS
-----	--------------------	-----	-----------------	----------	----------------	----------	-------

## • MONUSCO – STO Scenario

ECC STR/STO Purch. Grp	ECC Description	TM Sales Group	TM P&E Org	TM P&E Group	TM P&E Group Desc.	TM Freight Procurement Grp	TM Freight Proc. Desc.
T95	MONUSCO	SG_T95	MONUSCO	PE_PT95	MONUSCO	PG_FT95	FSTO

Organizational structure and mapping example for STOs.

Sales Group <-> ECC Purchasing Group on PO/STO



Planning and Execution Group

Freight Procurement Group

ECC/STO				TM = NEW	SRM/ECC
Entity	Plant	Purchasing Grp	Description	Planning & Execution Grp	Freight Purchasing Grp
UNGSC	IT01	TG1	GSCC - ENG	PSTO	F381 - UNGSC Proc -1
UNGSC	IT01	TG2	GSCC - ICT	PSTO	F381 - UNGSC Proc -1
UNGSC	IT01	TG3	GSCC - MED	PSTO	F381 - UNGSC Proc -1
UNGSC	IT01	TG4	GSCC - SHQ	PSTO	F381 - UNGSC Proc -1
UNGSC	IT01	TG5	GSCC - SUP	PSTO	F381 - UNGSC Proc -1
UNGSC	IT01	TG6	GSCC - TPT	PSTO	F381 - UNGSC Proc -1
UNGSC	IT01	TR1	UN Reserve	PSTO	F381 - UNGSC Proc -1
UNGSC	IT01	TS1	SDS	PSTO	F381 - UNGSC Proc -1
UNOCA	GA20	T32	UNOCA	PT32	FT32 - FSTO
UNOAU	ET20	T34	UNOAU	PT34	FT34 - FSTO
UNOWAS	SN20	T38	UNOWAS	PT38	FT38 - FSTO
UNSMIL	LY20	T40	UNSMIL	PT40	FT40 - FSTO
MINUSMA	ML10	T45	MINUSMA	PT45	FT45 - FSTO
OJSRS	SY20	T47	OJSRS (OSE-Syria)	PT47	FT47 - FSTO
UNSCOL	LB20	T50	UNSCOL	PT50	FT50 - FSTO
UNSCO	IL20	T51	UNSCO	PT51	FT51 - FSTO
UNMIK	XK10	T53	UNMIK	PT53	FT53 - FSTO
UNGSC	IT01	T58	UNGSC	PT58	FT58 - FSTO
UNTSO	IL10	T60	UNTSO	PT60	FT60 - FSTO
UNIFIL	LB10	T62	UNIFIL	PT62	FT62 - FSTO
UNDOF	SY10	T63	UNDOF	PT63	FT63 - FSTO
UNFICYP	CY10	T64	UNFICYP	PT64	FT64 - FSTO
UNAMI	IQ20	T66	UNAMI	PT66	FT66 - FSTO

## Mapping of Responsibilities in TM (COE & Troops)

The current organizational structure in TM reflects the strategic movement setup: MovCon UN HQ as transportation planner (TS.01) and PD UN HQ as Freight Buyer (TS.02). For MovCon the responsibility is split into Planning & Execution Aviation (includes LTC) and Planning & Execution Strategic Movement. For PD the responsibility is split into PD Aviation Team and PD Strategic Movement Team.

The current organizational structure in TM reflects the tactical (intra/inter-mission) movement setup: Local MovCon as transportation planner (TS.10) and local Procurement as Freight Buyer (TS.11). The responsibilities are split by mission and follow the STO role setup.

## Requesting Roles for TM

To request a new role for TM, a training needs to be successfully completed including the final evaluation. TS.10 – TS.12 assignments do not require a separate final evaluation. They will be granted after training and after a final assessment for either TS.01 – TS.03 or TS.07 – TS.09 was passed.

The UCS training team in Valencia can be reached through [ucstraining@un.org](mailto:ucstraining@un.org). New Roles can be requested through the Security Liaison Officer (SLO). Please visit: [https://iseek.un.org/departmental\\_page/addmodifydelete-user](https://iseek.un.org/departmental_page/addmodifydelete-user)

Further detailed information on functionality of each available TM role can be found in the role guide: [https://iseek.un.org/system/files/umoja\\_role\\_guide\\_published\\_4sept\\_2020.pdf](https://iseek.un.org/system/files/umoja_role_guide_published_4sept_2020.pdf)

## Chapter 3. Getting started in TM

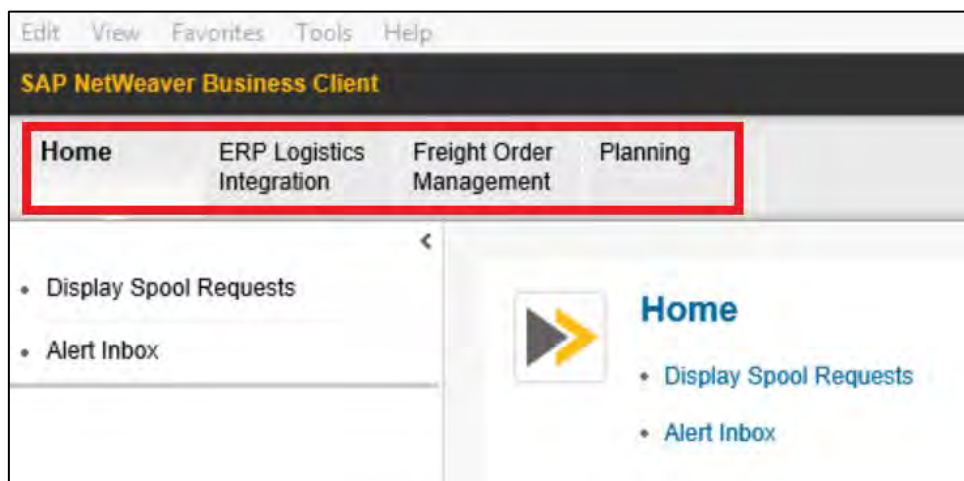
To access the TM system a user ID and password are necessary. Please refer to the **Requesting Roles for TM** section on how to gain access.

### Basic Navigation in TM

Access the Umoja Production systems. Choose “TM NWBC”.



Depending on the responsibilities and roles assigned in TM, the home screen might show different tabs that can be accessed.

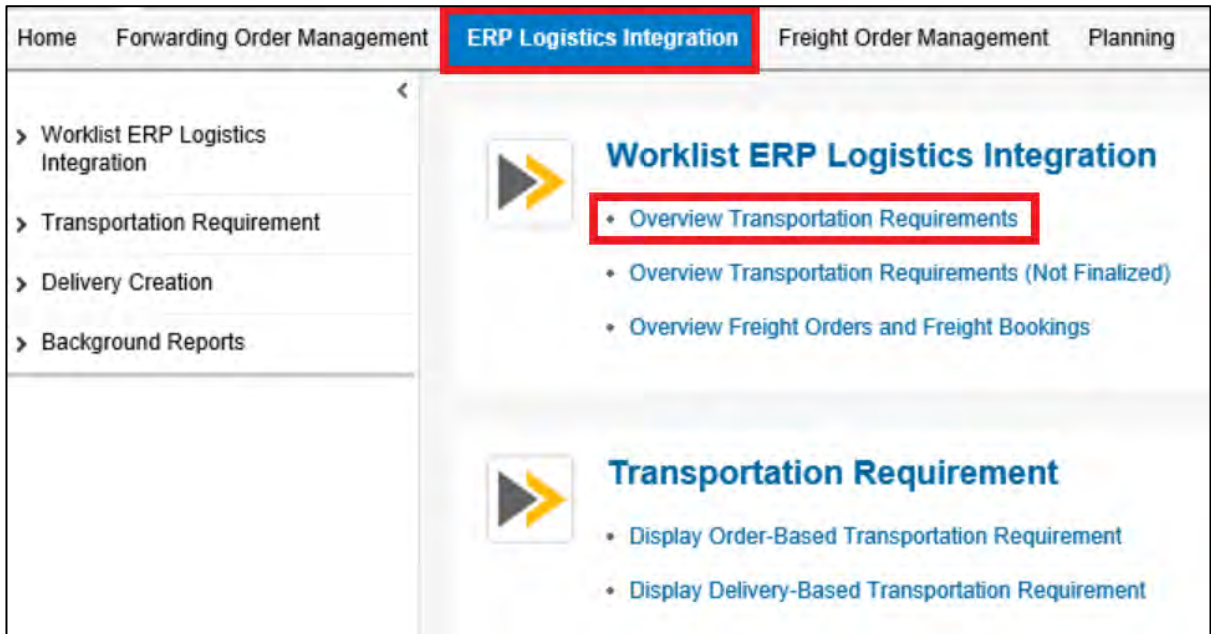


### Different Document Types in TM

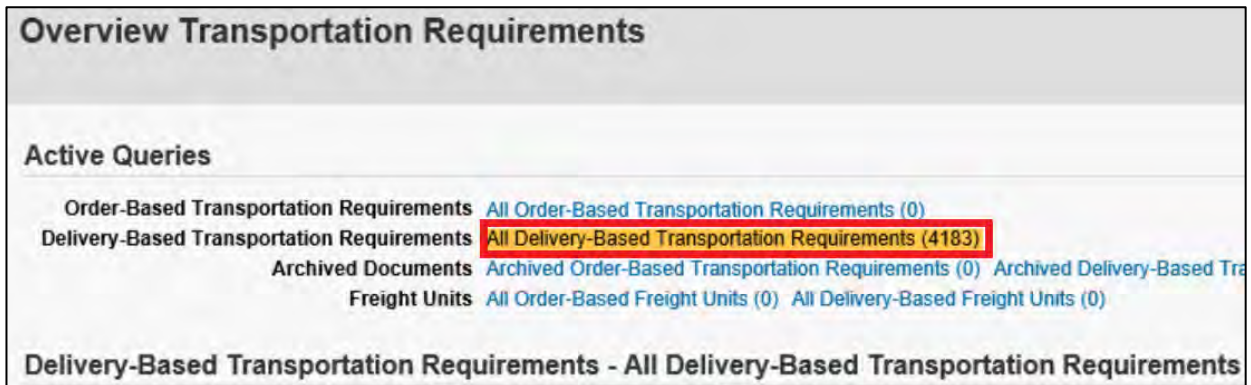
Depending on the roles the user has assigned in TM the below documents could be assessed.


**Delivery-Based Transportation Requirement (DTR)** – The DTR is the base document for transportation requirements in TM based on OBD or IBD data from ECC. It is used for UNOE and STO movements. One OBD or IBD equals one DTR (1:1 connection).

DTRs can be accessed through the “ERP Logistics Integration” tab. Then choose “Overview Transportation Requirements”.



Choose “All Delivery-Based Transportation Requirement”.



To find the DTR number belonging to a certain PO or STO, search by “Original Delivery” and enter OBD or IBD number or search by “Original Order” and enter the STO or PO number. If searching for more than one order, use the  button on the right of the row to enter/paste more than one number.

**Delivery-Based Transportation Requirements - All Delivery-Based Transportation Require**

Hide Quick Criteria Maintenance

DTR:  To

Transp. Reqmt Type:  To

Transp. Mode:  To

Original Delivery Category:  To

**Original Delivery:**  To

ERP Delivery Type:  To

Original Order Category:  To

**Original Order:**  To

Scroll down and press “Apply”.

**Calculated Dates**

**Apply** Clear

The DTR document can be accessed by clicking on the document number.

Home ERP Logistics Integration Freight Order Management Planning

Worklist

- Overview Transportation Requirements
- Overview Transportation Requirements (Not Finalized)
- Overview Freight Orders and Freight Bookings

Transportation Requirement

### Overview Transportation Requirements

Delivery Date (From):

Delivery Date (To):

Life Cycle Status:  To

**Calculated Dates**

Apply Clear

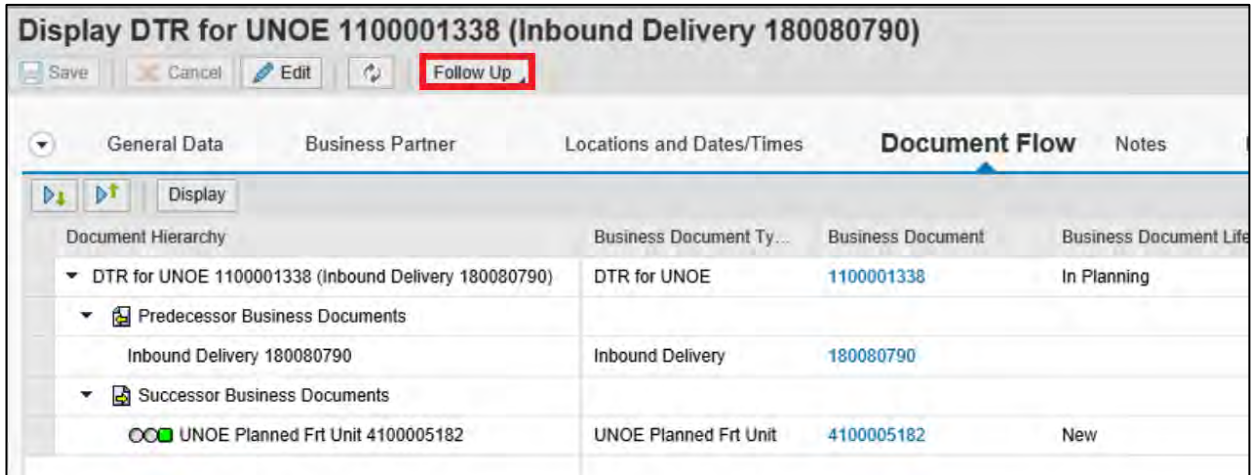
View: \* [Standard View] Display Start Transportation Cockpit Create Freight Units

Refresh

Document	T...	Original Delivery	Original Delivery Category
<a href="#">1100001339</a>	Z...	<a href="#">180080791</a>	Inbound Delivery
<b><a href="#">1100001338</a></b>	Z...	<a href="#">180080790</a>	Inbound Delivery
<a href="#">1100001337</a>	Z...	<a href="#">180080789</a>	Inbound Delivery
<a href="#">1100001336</a>	Z...	<a href="#">180080786</a>	Inbound Delivery
<a href="#">1100001333</a>	Z...	<a href="#">180080788</a>	Inbound Delivery
<a href="#">1100001331</a>	Z...	<a href="#">180080782</a>	Inbound Delivery
<a href="#">1100001243</a>	Z...	<a href="#">180080701</a>	Inbound Delivery
<a href="#">1100001240</a>	Z...	<a href="#">180080700</a>	Inbound Delivery
<a href="#">1100001238</a>	Z...	<a href="#">180080695</a>	Inbound Delivery

Information about DTR data and tabs are provided in section Different Document Tabs in TM of this document.

Through the “Follow Up” function on the DTR, the transportation cockpit can be started.



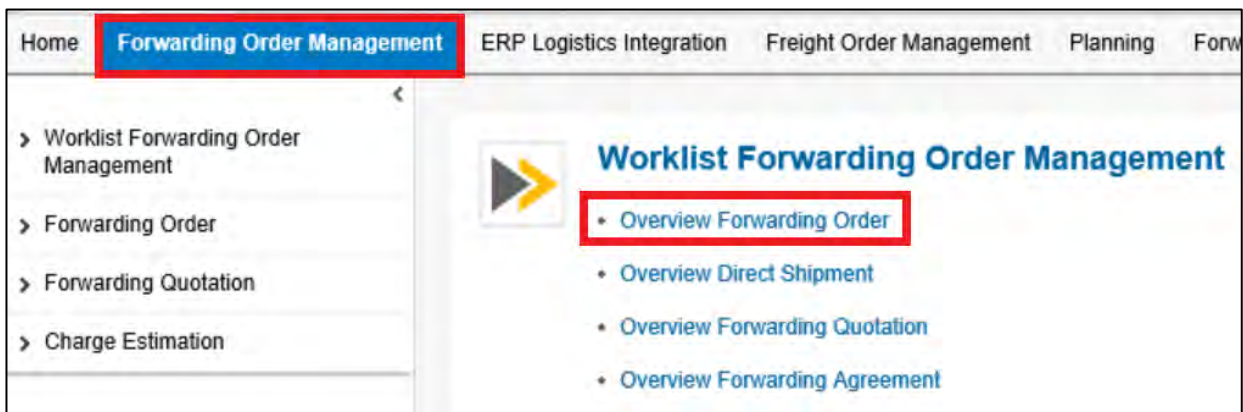
Choose “Start Transportation Cockpit”.




For details on the transportation planning process, please refer to section UNOE Planning Profiles and/or STO Planning Profile of this document.

**Forwarding Order (FWO)** – The FWO is the base document for transportation/movement requirements for COE and Troops. The FWO is uploaded directly in TM. The upload file is created through an Excel Macro.

FWOs can be accessed through the “Forwarding Order Management” tab. Then choose “Overview Forwarding Order”.



FWOs could be searched by FWO number itself but for example also by mission, using the “Buyer’s Reference Number”. Please note that the Buyer’s reference number contains more than the mission name, therefore a star “\*” should be added after the mission name. If searching for more than one order, use the  button on the right of the row to enter/paste more than one number.

**Worklists**

**Forwarding Orders - All Forwarding Orders**

Hide Quick Criteria Maintenance

Forwarding Order:

FWO Type:

Transp. Mode:

Shipping Type:

Movement Type:

Freight Booking or Freight Order:

Buyer's Reference Number:

Business Tr. Doc. ID:

Ordering Party:

Scroll down and press “Apply”.

Calculated Dates

Apply Clear

The FWO document can be accessed by clicking on the document number.

Home Forwarding Order Management Freight Order Management Planning

**Worklists**

Created By: 01PLCOEPS02

Calculated Dates

Apply Clear

View: \* [Standard View] New Other Copy Options Edit Display

Confirm Calculate Charges Create Forwarding Settlement Document Set Manual Block Re

Mass Output Export Refresh

Document	T...	Ordering Party	Shipper	Consignee	Pick-Up Date
2100000001	Z...	ID-00002	1111000...	SS10	10.12.2018
1500003433	Z...	CF10	CF10	1111000...	31.12.2020
1500003432	Z...	CF10	CF10	1111000...	31.12.2020
1500003431	Z...	CD10	CD10	1111000...	31.12.2020
1500003430	Z...	CD10	CD10	1111000...	31.12.2020
1500003429	Z...	CD10	CD10	1111000...	31.12.2020
1500003428	Z...	1111000126	1111000...	LB10	05.12.2020

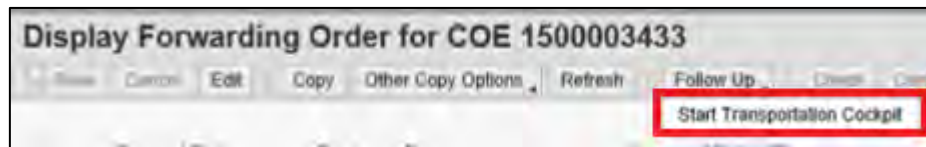
Information about FWO data and tabs are provided in section Different Document Tabs in TM of this document.

Through the “Follow Up” function on the FWO, the transportation cockpit can be started.






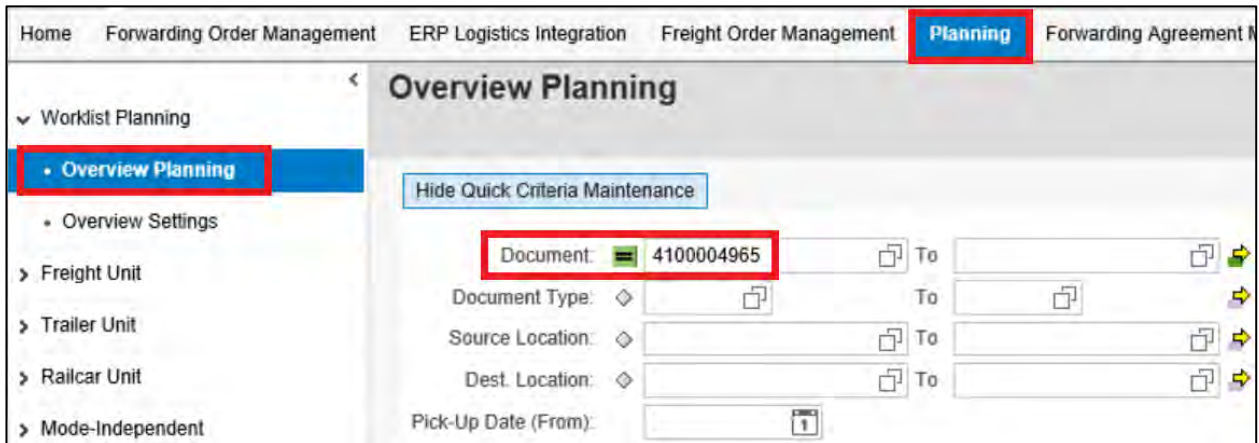
Choose “Start Transportation Cockpit”.



For details on the transportation planning process, please refer to section COE Planning Profiles and/or Troops Planning Profiles of this document.

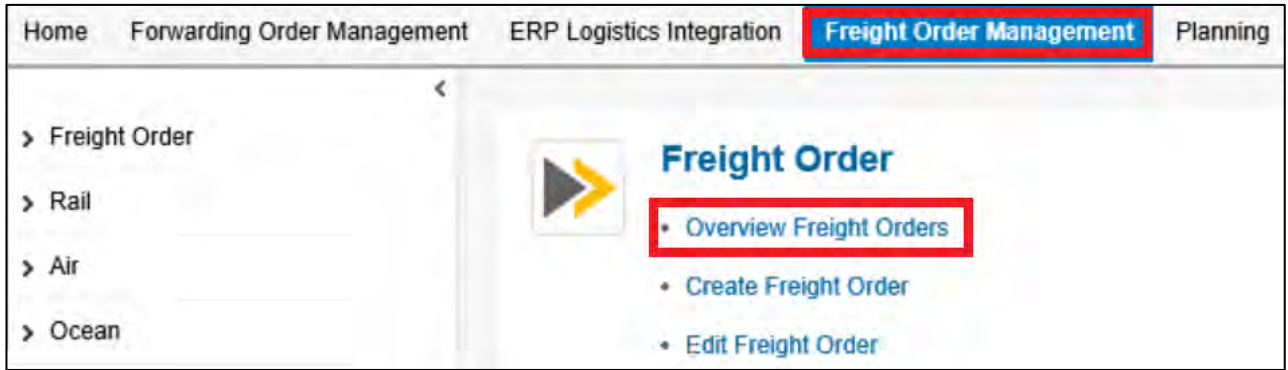
**Freight Unit (FU)** – The FU is the base document for transportation planning in TM. One DTR or FWO equals one FU (1:1 connection).

The FU can be accessed through the “Planning” tab. Then choose “Overview Planning” under the “Worklist” section. If searching for more than one FU, use the  button on the right of the row to enter/paste more than one number.

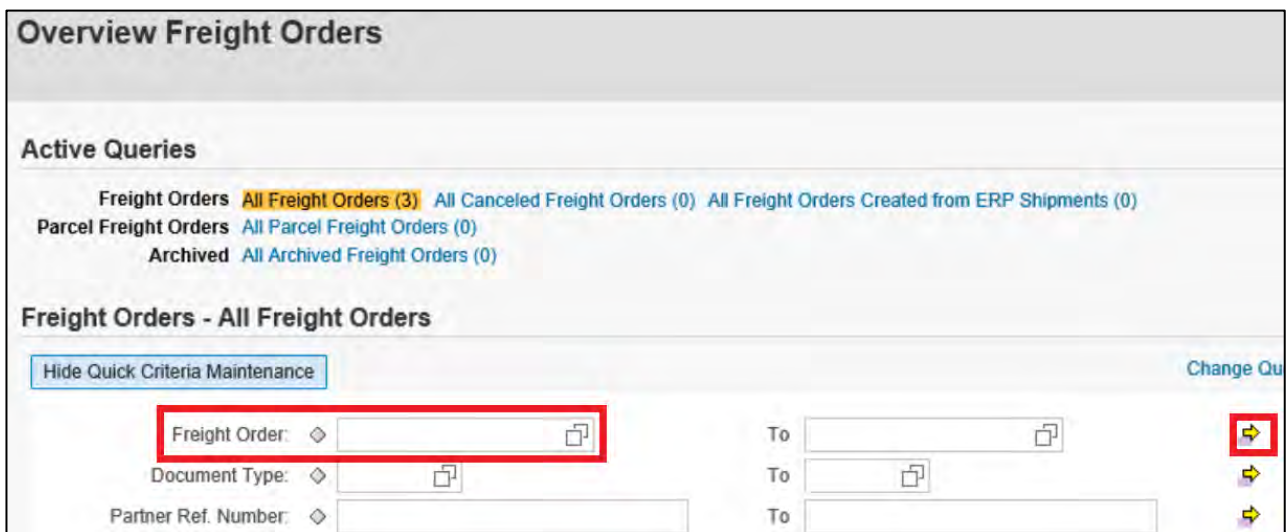


**Freight Order (FO)** – the FOs are the main documents for shipment/movement execution. FOs are created during the transportation planning by means of transport and depending on the route chosen. For one FU several FOs can exist (1:N). For consolidation cases several FUs can be combined into one FO (N:1).

FOs can be accessed through the “Freight Order Management” tab. Then choose “Overview Freight Orders”.



If searching for more than one order, use the  button on the right of the row to enter/paste more than one number.



FOs can also be searched by PO/STO number, ECC outbound or inbound delivery, FWO, MOU ref (same as Buyer's Reference Number), and SRM Freight PO. If these fields do not appear on the selection screen, please refer to the **Change Search Selection in TM** section of this document.

ERP Logistics Integration **Freight Order Management** Planning

### Overview Freight Orders

Created By:

Created On:

Changed By:

Changed On:

**PO/STO:**

**ECC Delivery:**

**Forwarding Order Num:**

**MOU Ref:**

**SRM Freight PO:**

Max. No. of Records:

Calculated Dates

### Different Document Tabs in TM

Each of the document types in TM has several tabs that contain different data. Please note that data and fields used, differ slightly between UNOE, STO, COE and Troops movements. Below example is based on a COE Forwarding Order.

The “General Data” tab shows for Forwarding Orders besides the document type, the buyer’s reference number, the sales group (determines responsibility), and the Incoterm.

Display Forwarding Order for COE 1500003201

Save Cancel Edit Copy Other Copy Options Refresh Follow Up Check Confirm Cancel Document Customs Page: Forwarding Order

**General Data** Business Partner Locations and Dates/Times Actual Route Ordered Route Document Flow Charges Notes

**Forwarding Order Data**

\* Document Type: ZFW1  
 Description: Forwarding Order for COE  
 Order Date: 26.10.2020  
 Life Cycle Status: In Planning  
 House Bill of Lading:  
 House Bill of Lading Status: Not Finalized  
 Carrier's Master Bill of Lading Num.:  
 Buyer's Reference Number: UNIFIL\_GNQBAT\_COE\_DEPLOY\_01112020  
 Cross-Trade Forwarding Order:  
 Import Decl. by LSP:  
 Insurance by LSP:  
 Buyer's or Shipper's Consolidation:  
 Controlled:   
 External Freight Agreement:

**Organizational Data**

Sales Organization: SO\_1000 United Nations Sales Org  
 Sales Office:  
 Sales Group: SG\_S02 PD Strat. Mov Team  
 Person Responsible:

**Settlement Terms**

Incoterm: EXW Ex Works  
 Incoterm Location:  
 Freight Term:

**Notes**

Furthermore, the movement type, goods value, gross weight, and gross volume are displayed.

**General Terms**

Service Level: 01 Standard

Transportation Mode:

Traffic Direction: 2 Import

Shipping Type:

Movement Type: ZDE Deployment

Delivery Priority:

Default Route:

High-Value Cargo:

Goods Value: 5,840,000.00 USD

Goods Value for Customs:

Insurable Value:

Gross Weight: 422,700 KG

Gross Volume: 2,965.332663 M3

Pieces:

Number of TEU:

The “Items” tab displays the products shipped and in case of troops movement the passengers, the quantity, volume and weight of baggage.

**Items**

Item Hierarchy: LoadList

- Container
- Vehicle
- Trailers
- Break Bulk

Product	Quantity	Unit of Measure	Gross Weight	Gross Weight UoM	Gross Volume	Gross Volume UoM	Net Weight	Net Weight UoM
CONTAINER20		EA	422,700	KG	2,965.332663	M3	422,700	KG
VEHICLE	51	EA	364,200	KG	2,611.386327	M3		
TRAILER	26	EA	24,200	KG	220.591876	M3		
BREAKBULK	18	EA	34,300	KG	133.35446	M3		

The “Business Partner” tab displays the Ordering Party, the Shipper, and the Consignee of the shipment/movement.

**Forwarding Order for COE 150003201**

Cancel Edit Copy Other Copy Options Refresh Follow Up Check Confirm

General Data **Business Partner** Locations and Dates/Times Actual Route

Actions	Party Role	Business Partner	Devia... Address	Name
	Ordering Party	ML10	<input type="checkbox"/>	UN Interim Force in Mali
	Shipper	1111000052	<input type="checkbox"/>	PM OF EQUATORIAL GUINEA TO THE UN
	Consignee	ML10	<input type="checkbox"/>	UN Interim Force in Mali

The “Locations and Dates/Times” tab displays the source and destination locations and addresses (if available) as well as the requested pick-up date and requested delivery date.

General Data Business Partner **Locations and Dates/Times** Actual Route Ordered Route Document Flow Charges

**Source** Location: **SUGN-00001** Conakry City UN/LOCODE: Requested Pick-Up Date: **01.11.2020** 12:00:00 UTC Confirmed Pick-Up Date: 00:00:00 UTC

**Destination** Location: **SUML-00003** Kidal City UN/LOCODE: Requested Delivery Date: **25.11.2020** 12:00:00 UTC Confirmed Delivery Date: 00:00:00 UTC

**Address** Street/House Number: Postal Code/City: Conakry Region: C Conakry Country: GN Guinea

**Address** Street/House Number: Postal Code/City: Kidal Region: 8 Kidal Country: ML Mali

Please note that for UNOE/STO only the ‘Delivery Date’ is populated. For UNOE/STO the delivery date reflects the pick-up date for EXW cases, the delivery date at final destination for DAP cases, and the delivery date at handover location for non-DAP/non-EXW cases.

**Display DTR for UNOE 1100001344 (Inbound Delivery 180080798)**

Save Cancel Edit Follow Up

General Data Business Partner **Locations and Dates/Times** Document Flow Notes Blocking Information

**Source** Source Location: SU110001402 TLD America Corporation Pick-Up Date (From): Pick-Up Date (To):

**Destination** Destination Location: ML10-171 MINUSMA **Delivery Date (From): 15.03.2021 00:00:00 UTC** Delivery Date (To):

The “Document Flow” tab displays documents that are connected to this movement. In below case exist the Forwarding Order (starting with 15...), the Freight Unit (starting with 41...), and one Freight Order (starting with 61...).

General Data	Business Partner	Locations and Dates/Times	Actual Route	Ordered Route	Document Flow
Document Hierarchy		Business Document Ty...	Business Document	Business Document Life...	Created By
Forwarding Order for COE 1500003200		Forwarding Order for COE	1500003200	Planned	02PLCOEP...
Successor Business Documents					
COE LOA Frt Unit 4100004604		COE LOA Frt Unit	4100004604	In Process	02PLCOEP...
COE Member Planned Frt Order (LOA) 6100...		COE Member Planned...	6100016884	In Process	BTCUSRR...

The “Administrative Data” tab displays when and by which user the document was created.

General Data	Locations and Dates/Times	Document Flow	Notes	Blocking Information	Administrative Data
Changed		Created			
Changed By: BTCUSRR5T100		Created By: R1PR5T100PXY			
Changed On/At: 29.10.2020 00:17:49 CET		Created On/At: 29.10.2020 00:09:02 CET			

On the Freight Unit document an important tab besides the above-mentioned ones, is the “Stages” tab. After planning the FU shows the different stages/FOs based on the route chosen during planning.

Display UNOE Vendor Delivered Frt Unit 4100004622									
Administrative Data   Execution   Customs   Output Management <b>Stages</b>									
Stage De...	Document	Departure Date	D. Tin	Requested Delivery Date	R. De Tin	A. Da Tin	A. S...	T. Mc	Source Location
Stage 1	UNOE Vendor Delivered Frt Order (VNDelv) 6100016948	28.10.2020	0..	28.10.2020	06:..	2..	0..	01	SU1110001294
Stage 2	UNOE Vendor Delivered Frt Order (VNDelv) 6100016962	28.10.2020	0..	28.10.2020	15:..	2..	1..	05	ROTTERDAM_AIRPC
Stage 3	UNOE Vendor Delivered Frt Order (VNDelv) 6100016949	26.04.2021	2..	27.04.2021	23:..	2..	0..	01	JUBA_AIRPORT

For unplanned shipments/movements or partially unplanned FUs the unplanned stages display an empty ‘Document’ field.

Execution	Customs	Output Management	Stages
Insert   Merge   Route   Schedule   Freight Document   Set OI S			
Stage De...	Document	Departure Date	
Stage 1	UNOE Vendor Delivered Frt Order (VNDelv) 6100016839	26.10.2020	
Stage 2	UNOE Vendor Delivered Frt Order (VNDelv) 6100016840	26.10.2020	
Stage 3	UNOE Vendor Delivered Frt Order (VNDelv) 6100016843	27.10.2020	
Stage 4			

On the Freight Order document, important tabs besides the above-mentioned ones, are “Charges”, “Execution”, “Notes”, “Attachments”, “Output Management”, and “Document References”.

The “Charges” tab shows the estimated and actual cost. Charges are usually entered by cbm or by flight (air movements). After the actual charge was entered the estimated charges automatically are deactivated and the total amount in the header displays the total of actual cost for that FO.

The screenshot displays the 'Charges' tab for a Freight Order. The header shows the following information:

- Invoicing Status: 01 Not Invoiced
- Charge Calc. Status: 02 Calculated
- Total Amount in Local Currency: 93,795.00 USD
- Total Amount in Document Currency: 93,795.00 USD
- Rounded Total Amount in Document Currency: 93,795.00 USD
- Rounded Amount Difference in Document Currency: 0.00 USD
- Calculation Date: 30.10.2020 03:16:17 CET
- Exchange Rate Date: 30.10.2020

The table below shows the charge items:

Charge Hierarchy	Logistical Reference	Rate Amount	Currency	Unit	Quantity	Calculation Base	Charge Type	Calculated Amount
Sum								
Dummy Carrier / New York								
Package 50								
Estimate Charge	10 - CONTAINER20		USD	M3		GROSS_VOLUME	ESTIMATE CHARGE	
Estimate Charge	20 - VEHICLE	200.00	USD	M3	431	GROSS_VOLUME	ESTIMATE CHARGE	86,200.00
Estimate Charge	30 - TRAILER	190.00	USD	M3	50	GROSS_VOLUME	ESTIMATE CHARGE	9,500.00
Estimate Charge	40 - BREAKBULK		USD	M3		GROSS_VOLUME	ESTIMATE CHARGE	
Actual Charge		195.00	USD	M3	481	GROSS_VOLUME	ACTUAL CHARGE	93,795.00

On the “Execution” tab all expected events for the FO are displayed. Expected events differ depending on the type of carriage, movement type, and Incoterm. As an example, the ‘Handover Document’ event for an EXW shipment will be displayed on the pre-carriage, while for an FCA shipment it will be on the carriage after the handover location. The ‘Proof of Delivery’ event is only displayed on the last leg. The events of the “Execution” tab are visible for the responsible goods vendor/freight forwarder in the CCP. Please note that for certain expected events (if submitted or overdue) such as ‘Handover document’ or ‘Departure’ automated email notifications are sent to UN users. Email notifications are set up by function (Transportation Planner, Freight Buying, and R&I). For all reported unexpected events email notifications are sent.

**Display COE UN Planned Frt Order (non-LOA) 6100017004**

Save Cancel Edit Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting Create Service

Execution Notes Attachments Statuses Blocking Information Administrative Data Terms a

Report Event Insert Event

Statu...	Event	Planned Date	Actual Event Date	Actual Event Time	Time Zone	Location
	Tax Exemption	08.11.2020 12:00:00 CET		00:00:00	CET	SPDEB9 – UNEP ASCOBANS Bonn
	Loading Begin	18.11.2020 09:30:37 CET		00:00:00	CET	ANTWERPEN_PORT – Antwerpen-Port
	Loading End	18.11.2020 09:30:37 CET		00:00:00	CET	ANTWERPEN_PORT – Antwerpen-Port
	Departure	18.11.2020 09:30:37 CET		00:00:00	CET	ANTWERPEN_PORT – Antwerpen-Port
	Arrival at Destination	18.11.2020 12:00:00 CET		00:00:00	CET	SPDEB9 – UNEP ASCOBANS Bonn
	Unloading Begin	18.11.2020 12:00:00 CET		00:00:00	CET	SPDEB9 – UNEP ASCOBANS Bonn
	Unloading End	18.11.2020 12:00:00 CET		00:00:00	CET	SPDEB9 – UNEP ASCOBANS Bonn
	Custom Clearance	19.11.2020 10:45:19 CET		00:00:00	CET	SPDEB9 – UNEP ASCOBANS Bonn
	Proof of Delivery	20.11.2020 14:00:00 CET		00:00:00	CET	SPDEB9 – UNEP ASCOBANS Bonn

The “Notes” tab shows messages entered by the vendor/carrier in the CCP and messages entered by UN staff directly in the notes section. Please note that no notifications are sent when new notes are submitted.

Notes General Data Business Partner Items Stages Utilization

Insert

Text Type	Language	I...	Content
Nature of Goods	English	<input type="checkbox"/>	Below received from MCS.
Nature of Goods	English	<input type="checkbox"/>	Today we have uploaded new ANNEX C-1 for approval.
Nature of Goods	English	<input type="checkbox"/>	Vessel: Martha is giving ETA Jakarta 9-10 March.

The “Attachments” tab shows all documents uploaded either directly in TM or through the CCP. Documents marked as ‘Internal’ are not visible in the CCP.



Attachments						
Name	Description	Visibility Type	Attachment Type	URL	Comp...	Size
	EXTERNAL BDNF REPATRI	Internal	Attachment			15.8 KB
	3- MCR 05 Apr 2019.docx	Internal	Attachment			52.7 KB
	EXTERNAL BDNF REPATRI	Internal	Attachment			24.1 KB
	3- MCR 05 Apr 2019.docx	Internal	Attachment			60.9 KB
	MCR CHALK 9.docx	Internal	Attachment			56.3 KB
	MCR CHALK 8.docx	Internal	Attachment			55.8 KB
	MCR CHALK 7.docx	Internal	Attachment			53.6 KB
	MCR CHALK 6.docx	Internal	Attachment			55.9 KB

The “Output Management” tab displays the SOW for Freight Orders where the UN is responsible for shipment/movement planning. The SOW is in pdf format and should be downloaded. Then the SOW can be opened directly in Word for adjustment to the specific shipment/movement.

Display COE UN Planned Frt Order (non-LOA) 6100017004																				
Execution	Notes	Attachments	Statuses	Blocking Information	Administrative Data	Terms and Conditions														
<table border="1"> <thead> <tr> <th>Action Status</th> <th>Processing Type</th> <th>Document Number</th> <th>Deactivate</th> <th>Partner Dependent</th> <th>Language</th> <th>Print</th> </tr> </thead> <tbody> <tr> <td>Unprocessed</td> <td>External Communication</td> <td>COE SOW FORM</td> <td></td> <td></td> <td>EN</td> <td></td> </tr> </tbody> </table>							Action Status	Processing Type	Document Number	Deactivate	Partner Dependent	Language	Print	Unprocessed	External Communication	COE SOW FORM			EN	
Action Status	Processing Type	Document Number	Deactivate	Partner Dependent	Language	Print														
Unprocessed	External Communication	COE SOW FORM			EN															

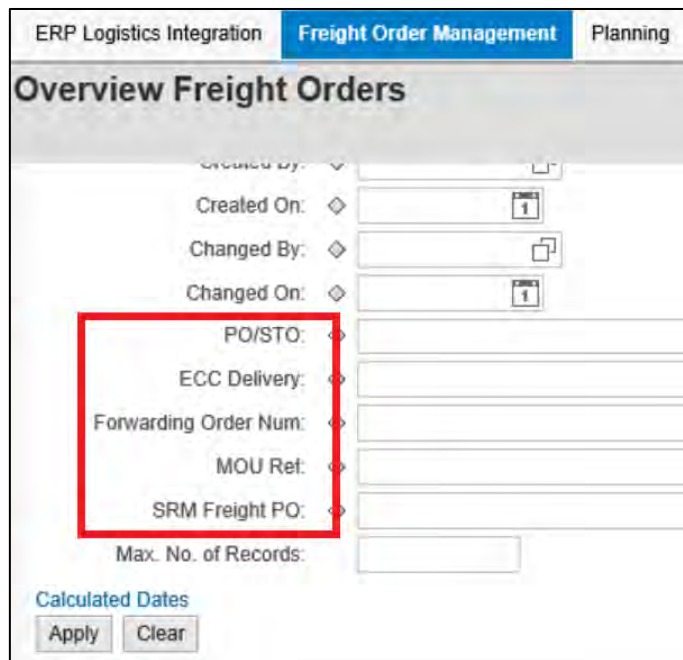
The “Document References” displays connected documents such as ECC document and/or SRM Freight PO (if applicable).

Document References		
Business Transaction Document ID	Document... for Business Transaction	Document Type for Business Transaction (Desc.)
1100002364	1123	Transportation Request
180129778	58	Inbound Delivery
2200160638	001	Purchase Order
2200167442	ZTRS	SRM Freight Purchase Order

### Change Search Selection in TM

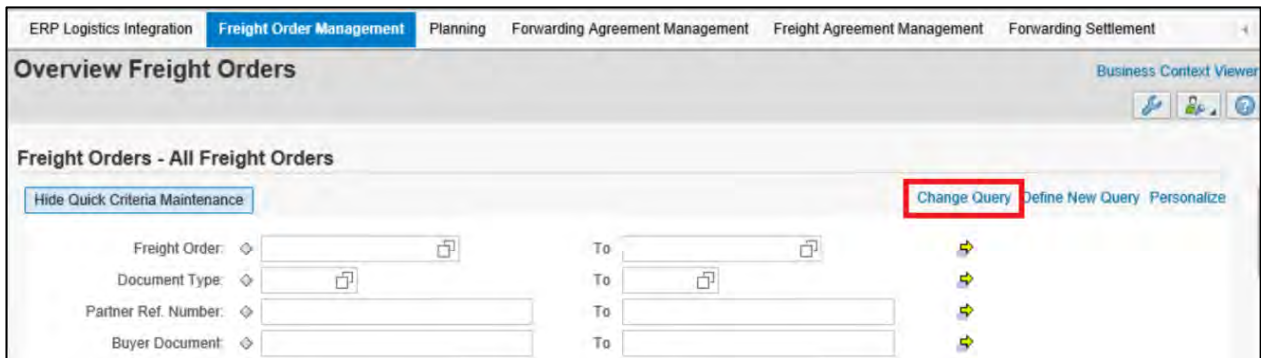
Selection screen fields and visualization of reports and tabs can be changed in TM.

To add/delete search fields for Freight Orders selection go to the “Overview Freight Orders”. Please note that the same process is applicable to add/delete fields on other search screens for DTR, FWO etc.



Custom fields need to be added to the selection criteria first, in order to search by them.

To do so, click on the “Change Query” on the upper right of the search fields.



Scroll down to the bottom of the page and click “Criteria Personalization”.

### Overview Freight Orders

PO/STO:  To

ECC Delivery:  To

#### COE

Forwarding Order Num:

MOU Ref:

#### UN Document References

SRM Freight PO:  To

#### General Selection Settings

Max. No. of Records:

Preview **Criteria Personalization** Calculated Dates

Apply Cancel

Mark the fields that should appear on the selection screen. UN custom fields are at the bottom of the selection. Any fields that are not needed on the selection screen could be de-selected.

### Change Query 'All Freight Orders' (Object Type: Freight Order)

#### Maintain Additional Personalization per Criteria

Criteria	Add to Quick Search
<b>UNOE</b>	
PO/STO	<input checked="" type="checkbox"/>
ECC Delivery	<input checked="" type="checkbox"/>
<b>COE</b>	
Forwarding Order Num	<input checked="" type="checkbox"/>
MOU Ref	<input checked="" type="checkbox"/>
<b>UN Document References</b>	
SRM Freight PO	<input checked="" type="checkbox"/>
<b>General Selection Settings</b>	
Max. No. of Records	<input checked="" type="checkbox"/>

Apply Cancel

After the fields are checked that should show in the search selection, click "Apply" on the lower left.

Click "Apply" again.

**Overview Freight Orders**

PO/STO:

ECC Delivery:

**COE**

Forwarding Order Num:

MOU Ref:

**UN Document References**

SRM Freight PO:

**General Selection Settings**

Max. No. of Records:

[Preview](#) [Criteria Personalization](#) [Calculated Dates](#)

**Apply** **Cancel**

The newly added field(s) show now on the selection screen. Enter the selection and press “Apply” below the search fields.

SRM Freight PO:  To

Max. No. of Records:

[Calculated Dates](#)

**Apply** **Clear**

View: Nicole Standard


SRM Freight PO	PO/STO	MOU Ref	Document	Carrier
2200169967		MINUSMA_DNKMIL_COE_REP...	6100007111	1110002222
2200169967		MINUSMA_DNKMIL_COE_REP...	6100006456	1110002222
2200169967		MINUSMA_DNKMIL_COE_REP...	6100006457	1110002222


The report shows all the Freight Orders applicable to the search.


### Add Fields to Reports in TM

Additional fields can be added to the output fields of the Freight Order overview or any other reports.

Click on “Open Settings Dialog” on the right of the report output.

Forwarding Order Num.:  To:  


MOU Ref.:  To:  

SRM Freight PO:  To:  

Max. No. of Records:

Calculated Dates

View: [Standard View]



cription)	Means of Transport	Vehicle Resource	Registration No.	Life Cycle Status	Execution Status	Logistical Execution
	COE_SEA	COE_SEA		In Process	Ready for Transportation Execution	DAKAR_PORT Not
	COE_TRK	COE_TRK		In Process	Ready for Transportation Execution	BAMAKO_AIRPOR
	COE_TRK	COE_TRK		In Process	Ready for Transportation Execution	AALBORG_PORT

Search the field(s) on the Column Selection on the left (“Hidden Columns”).

**Settings**

View: [Standard View]

**Column Selection** | Sort | Calculation | Filter | Display

Hidden Columns

- Consignee
- Cons. Savings
- Creation Type
- Cross-Document Check Status
- Cur. Weight on Axle
- Cur. Weight on Axle
- Cur. Weight Connect

Displayed Columns

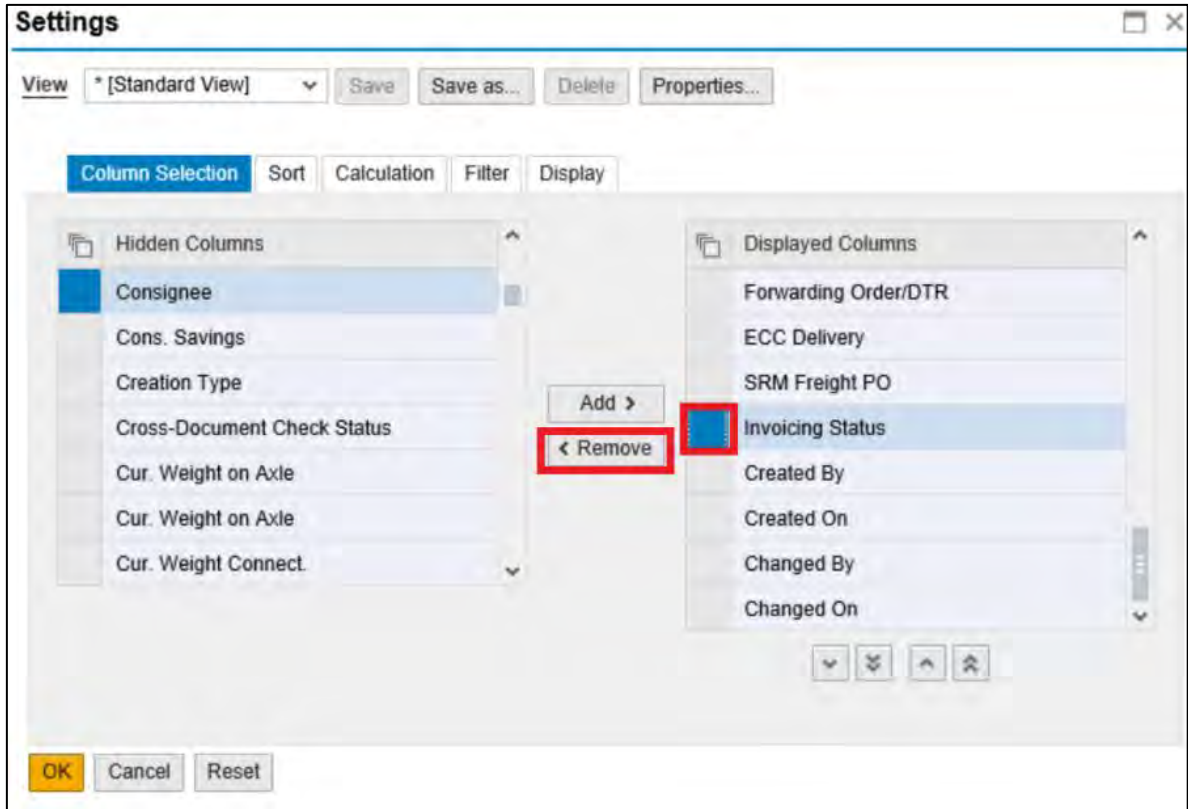
- Forwarding Order/DTR
- ECC Delivery
- SRM Freight PO
- Invoicing Status
- Created By
- Created On
- Changed By
- Changed On

To add a field to “Displayed Columns” in the report, mark the row on the left and click ‘Add >’. The field(s) can be moved up and down with the arrows below the displayed columns.



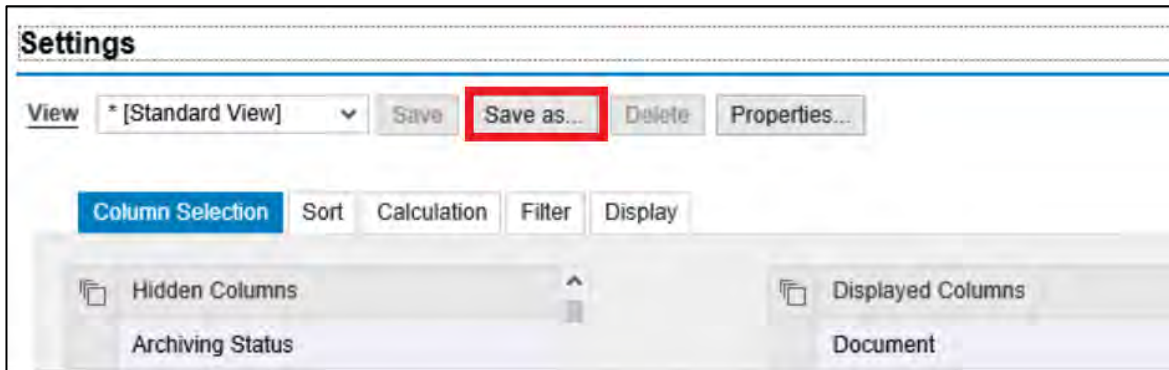
The sequence of the fields in “Displayed Columns” reflects the field sequence appearance in the report output. The sequence of the fields could also be changed through drag&drop in the report directly.

To remove fields from the report output, please mark the field(s) to be removed in the “Displayed Columns” section and then press “Remove”.



It is recommended to save the desired report layout in a different view as otherwise the next time the newly added column(s) would not show in the report. Please note, that if you change field sequence through drag&drop in the report, the sequence would not automatically be changed but would need to be saved as well.

Click on “Save As” on top of the selection columns.



Name the view. The “Initial View” field can be marked to default future reports to this view.

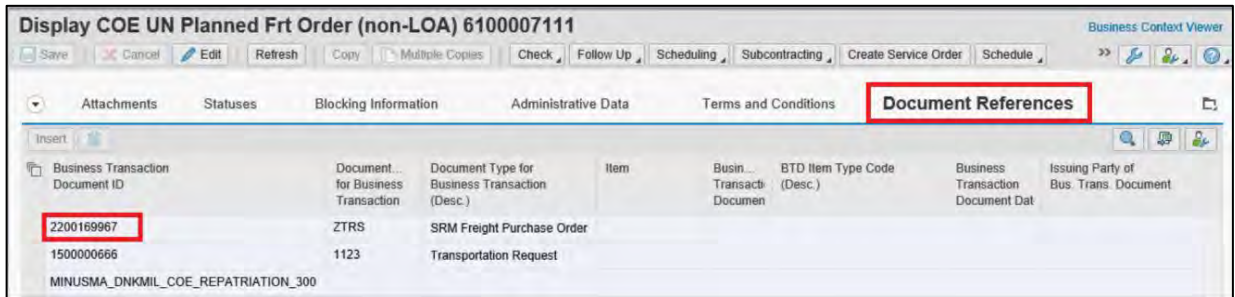


After naming the report click “ok”.

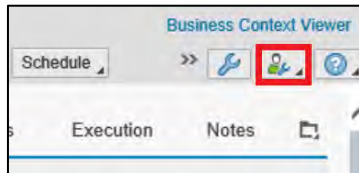
### Display additional Tabs in TM

Not all tabs are shown by default in TM. On the Freight Orders, the SRM Freight PO shows under ‘Document References’. ‘Document References’ is a tab that is not shown by default.

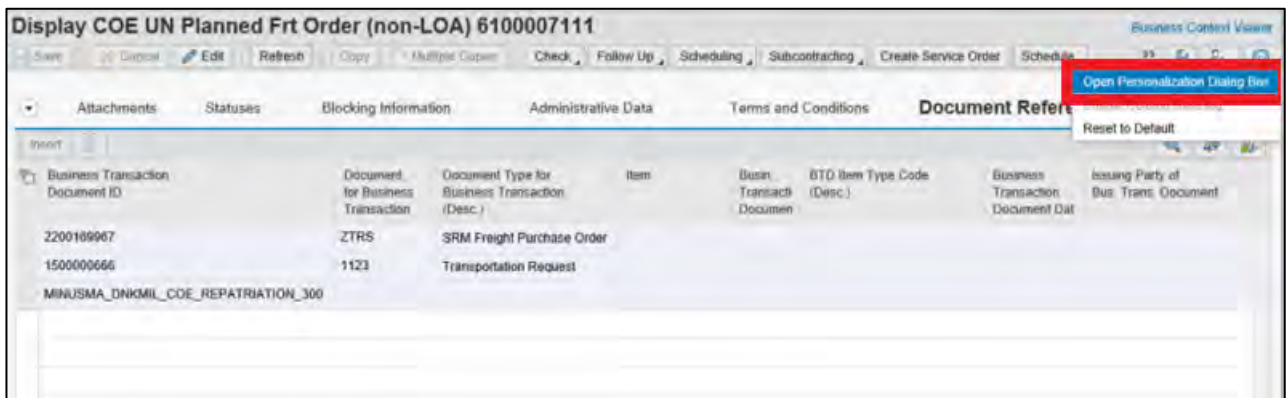
Please note, that additional tabs can be added to other documents in TM as well and the process is the same as for Freight Orders.



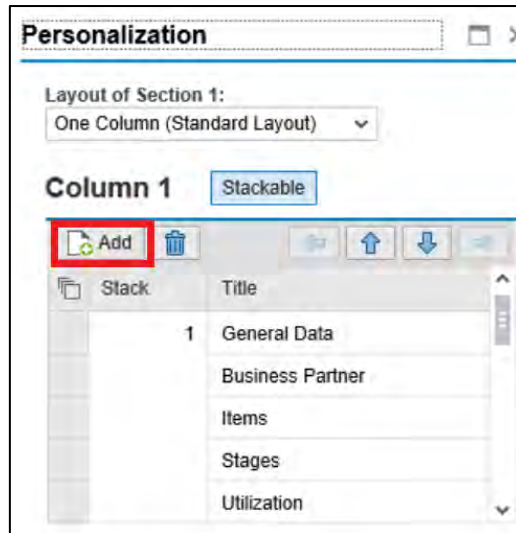
If the ‘Document References’ tab does not show it can be added through clicking on “Personalize” on the upper right corner.



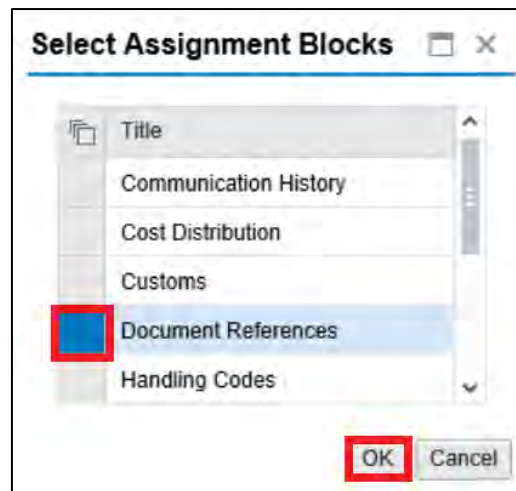
Choose “Open Personalization Dialog Box”.



Click on “Add” and choose the desired tab:

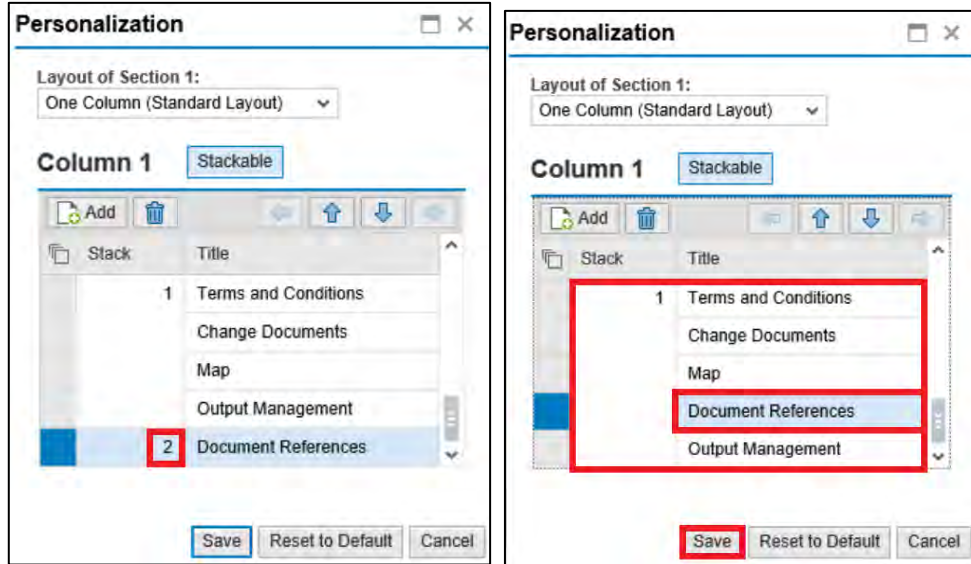


Mark the line with the tab to be added and click “ok”:



Please note that by default the newly added field shows as stack 2. If it is not changed it will appear in TM below the other tabs not next to it. Through drag&drop the tab can be moved to stack 1.

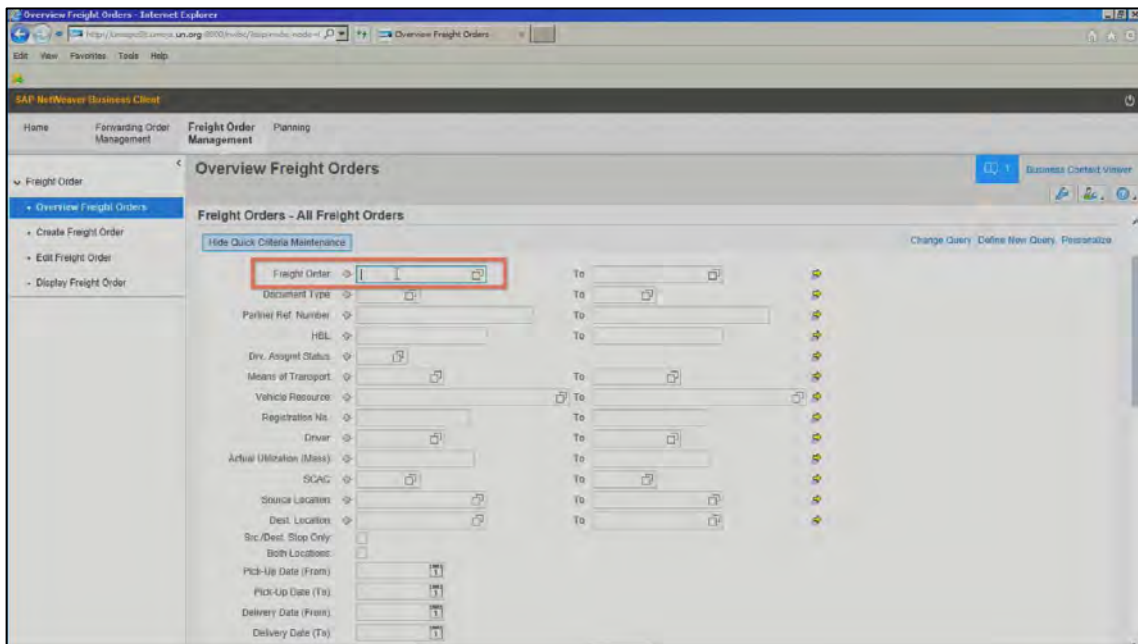




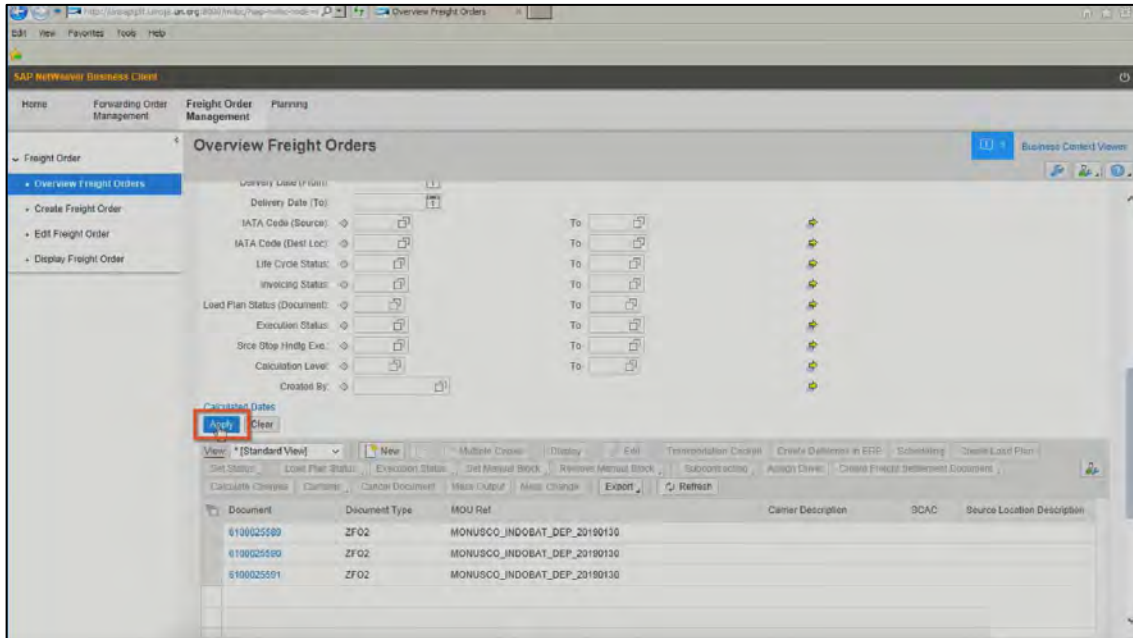
Click “Save”. The new tab is now displayed in TM on the Freight Order. This setting must be done only once and the tab will show on Freight Orders from now on.

## Searching for a Freight Order knowing the Freight Order Number

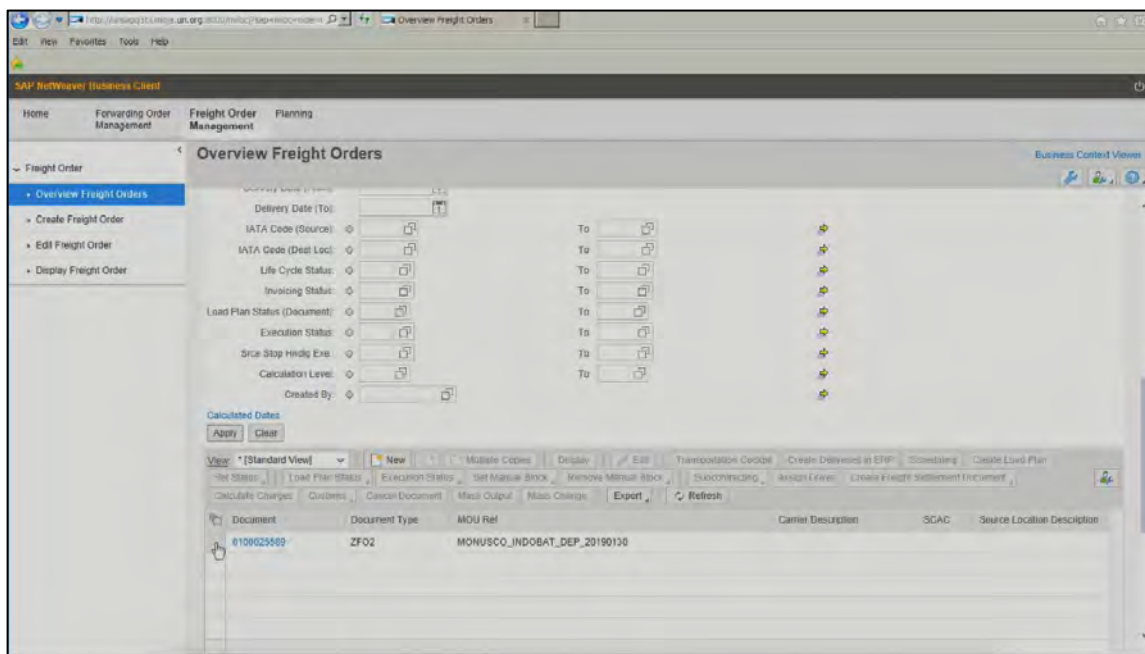
1. If we happen to know the exact number of our Freight Order, we can insert it in the search field with the same name.



Then we should simply scroll down until we find the Apply button and click on it.



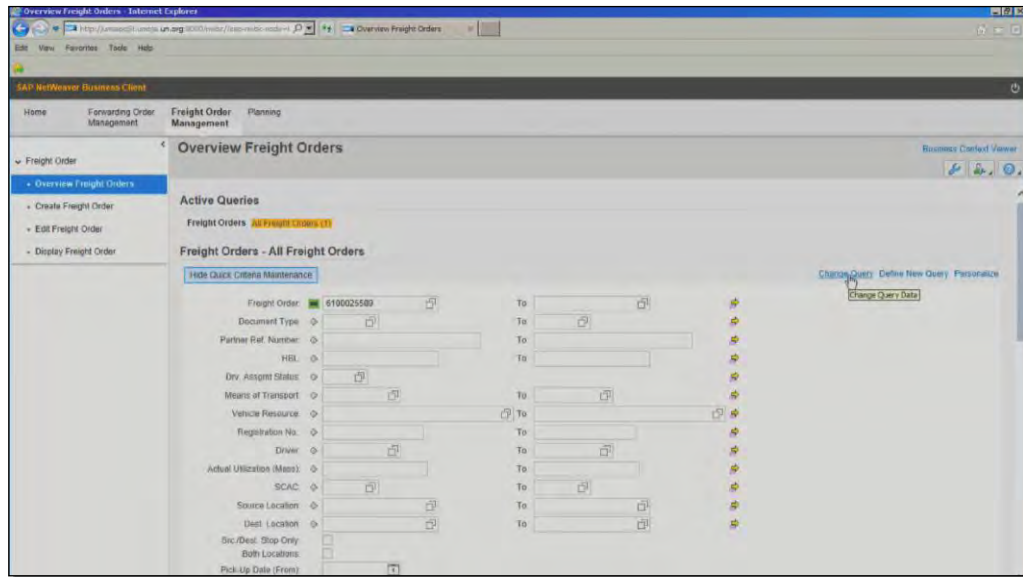
Once we do so, our **single Freight Order** displays in the **Freight Order Result** section of the Overview Freight Orders window. In our example, we have searched for the 6100025589 Freight Order.



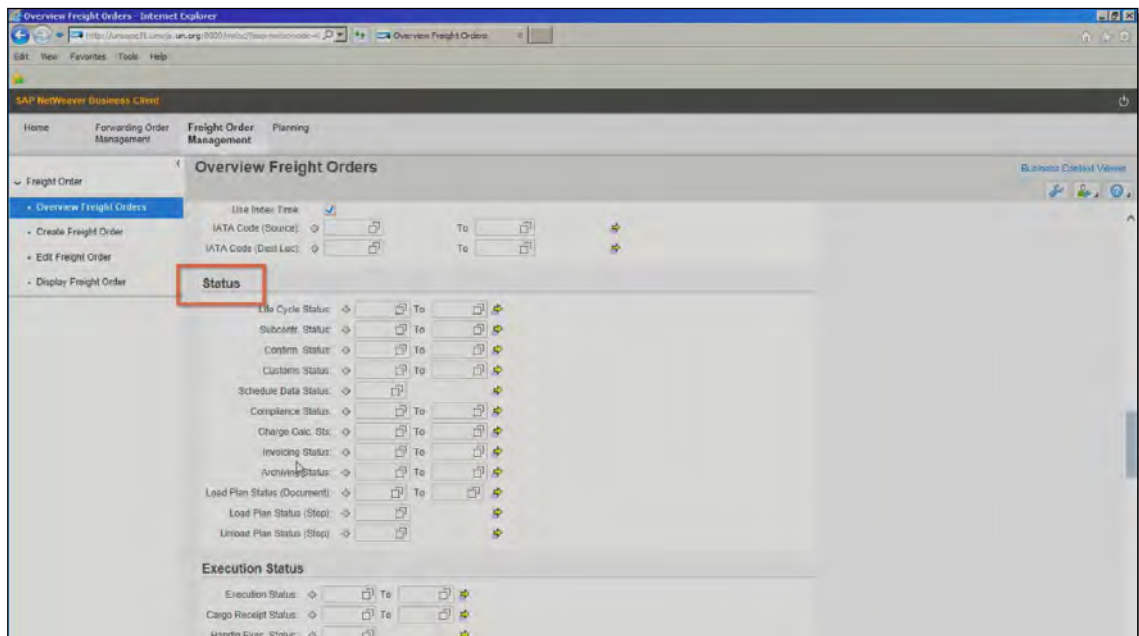
## Searching for a Freight Order not knowing the Freight Order Number but knowing other data

2. But, if we do not have the number of the **Freight Order** but we have other related data like the **Forwarding Order** number or the **MOU reference number**, we can still search to find our Freight Order.

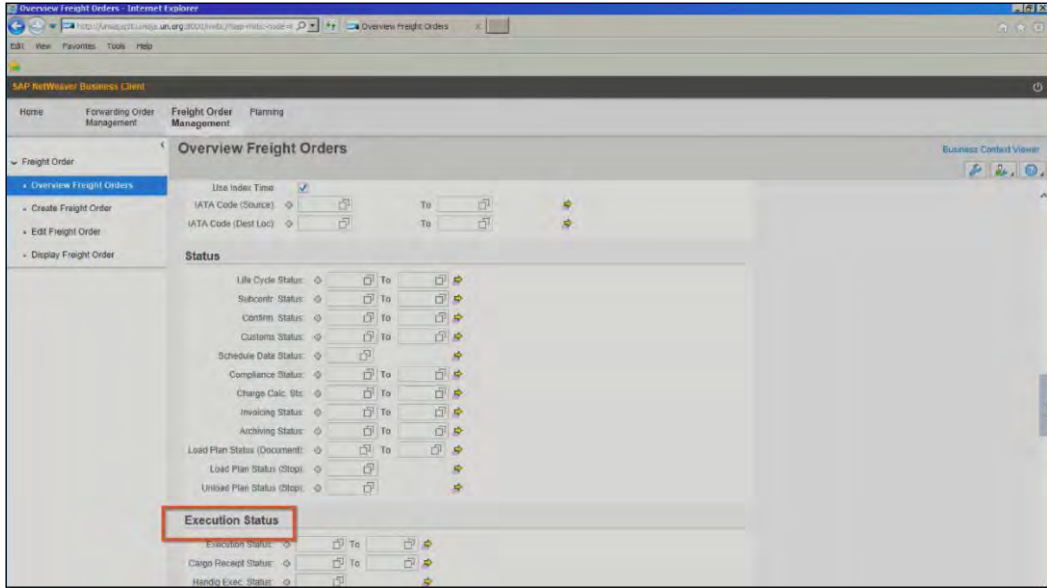
To see the fields to insert any of these two options, we should first click on **Change Query**.



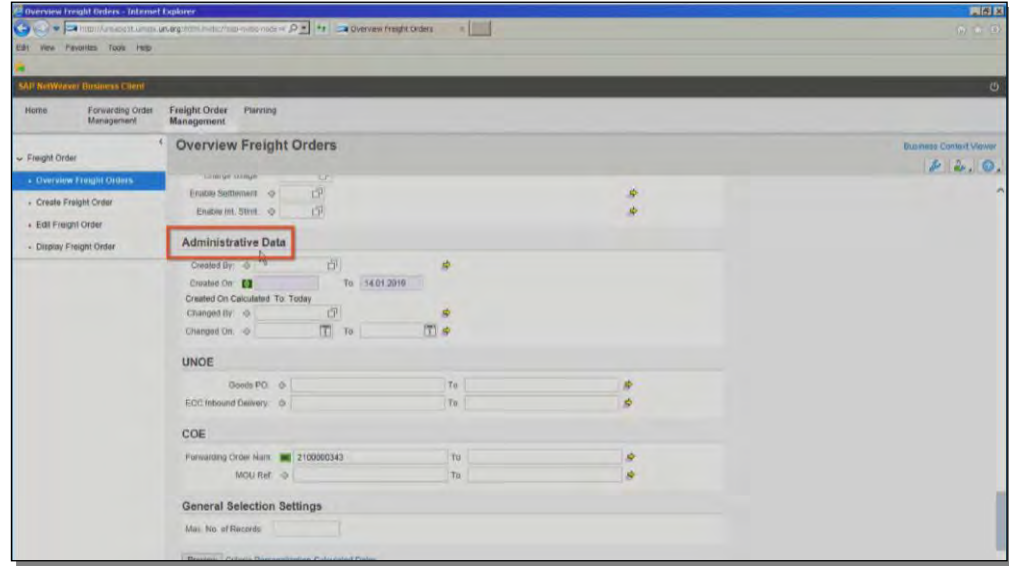
This will display a number of fields that were not displayed before, where we can add additional data. For example, the **Status**,



The **Execution Status**,

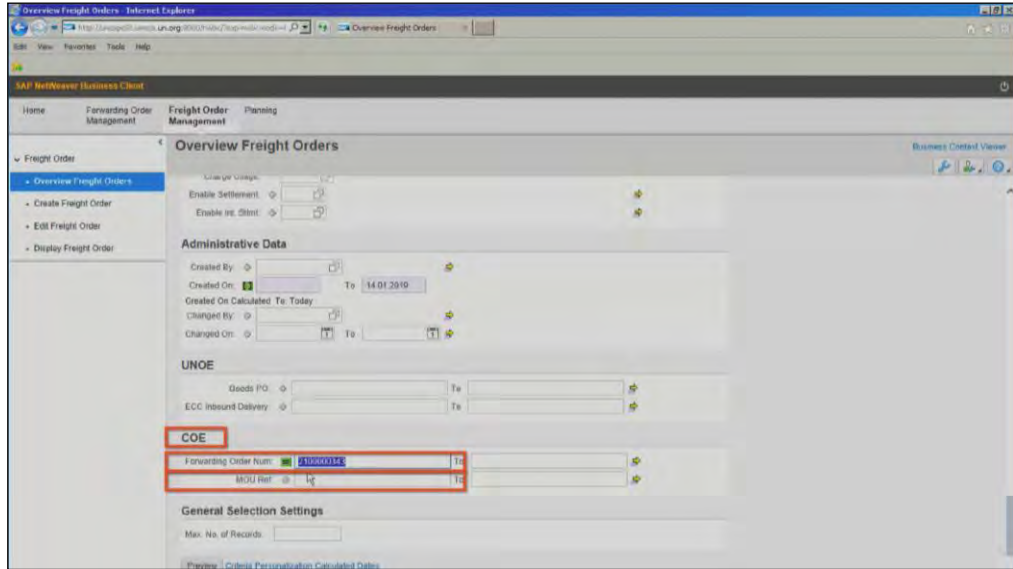


As well as **Administrative Data**,

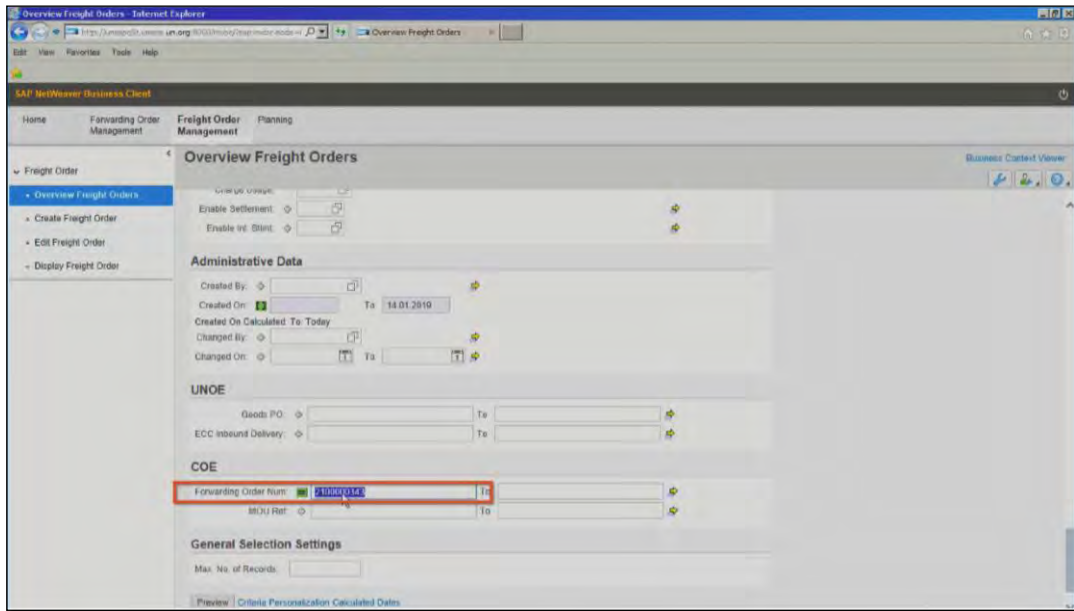


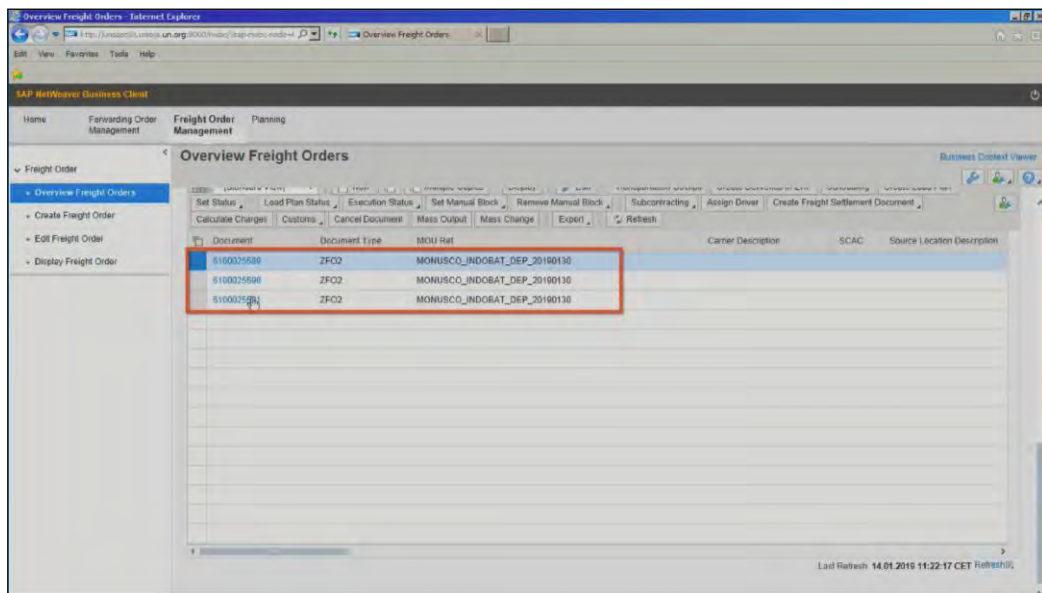
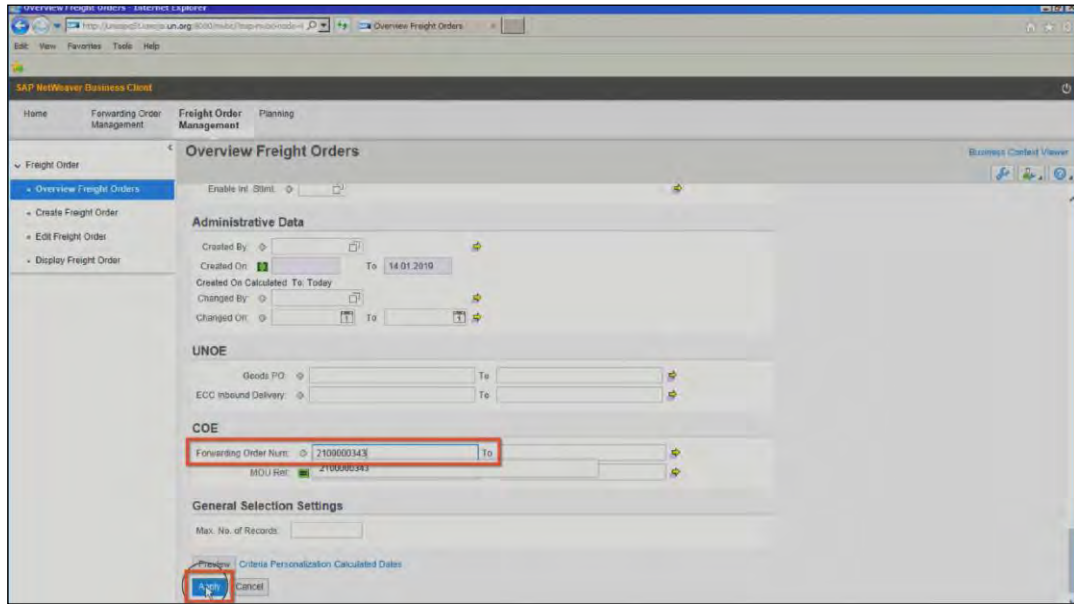
And, as we can see below, **COE**. Here is where we will find both fields:

- **Forwarding Order Num.** (Forwarding Order Number)
- **MOU Ref.** (Memorandum of Understanding Reference Number)

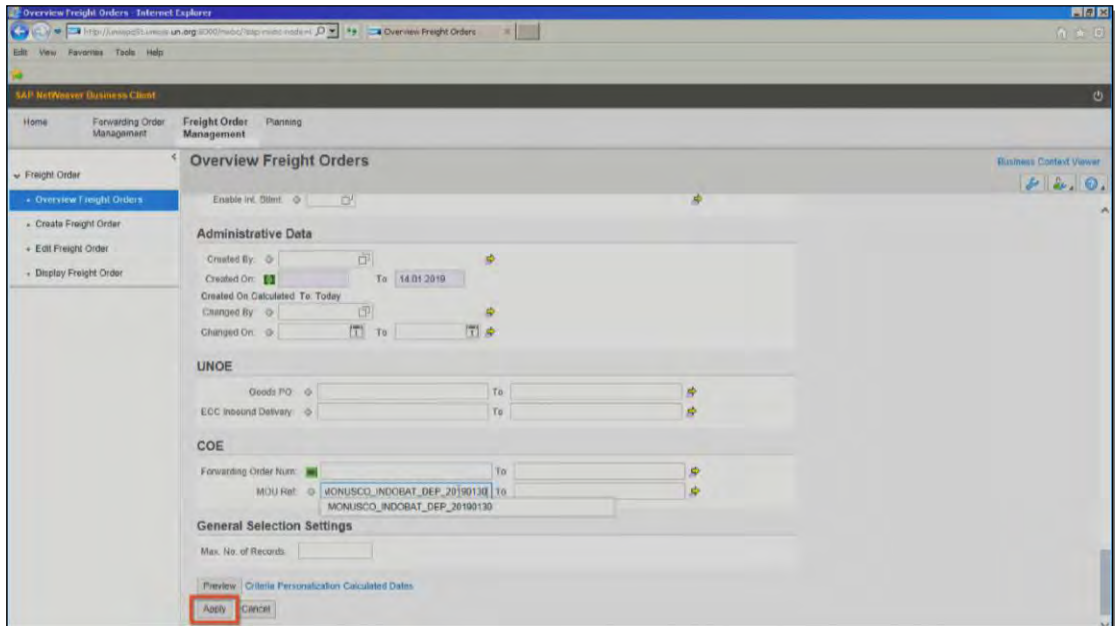
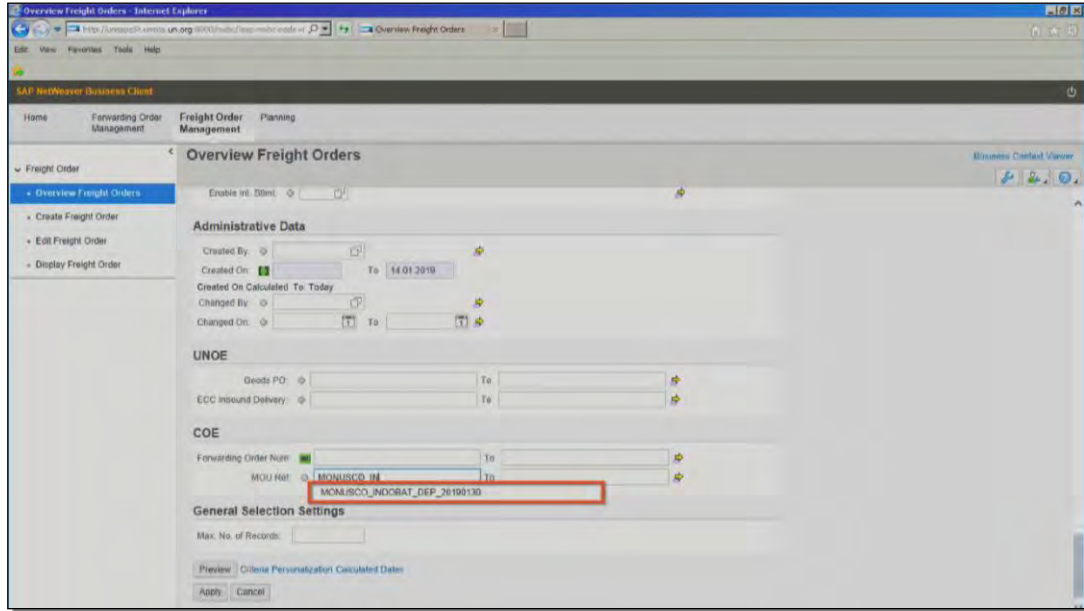


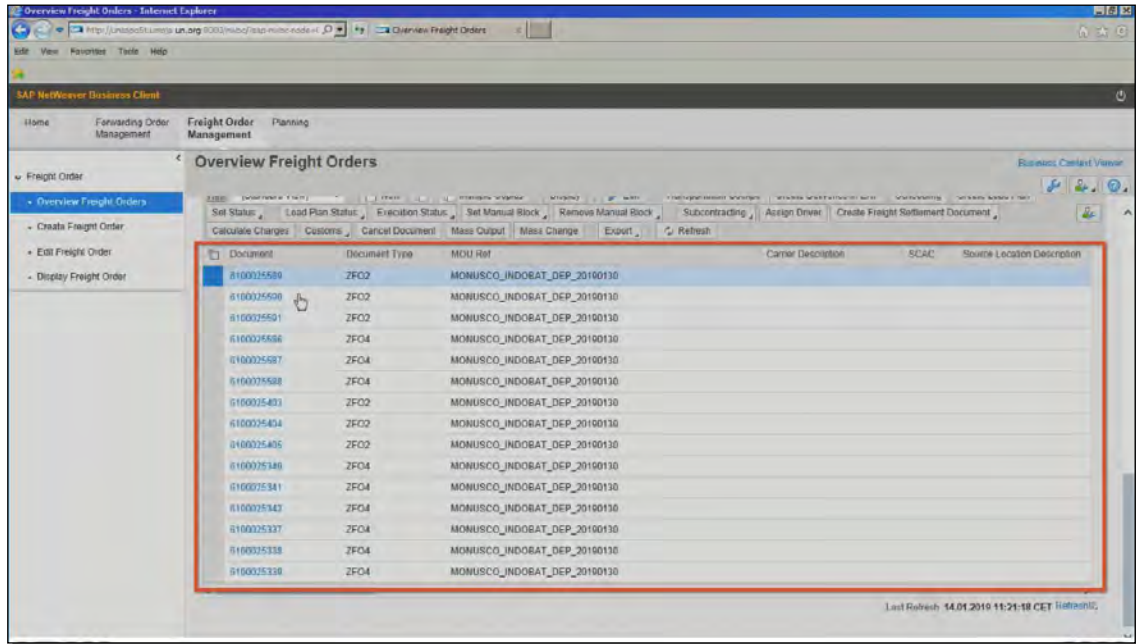
- By adding our Forwarding Order Number (**Forwarding Order Num.**) here and then click on **Apply**, *all the Freight Orders that are linked to that Forwarding Order Number will be displayed*. This is what we will usually need to do in order to submit events in TM, for Freight Orders that are linked to a Forwarding Order number.





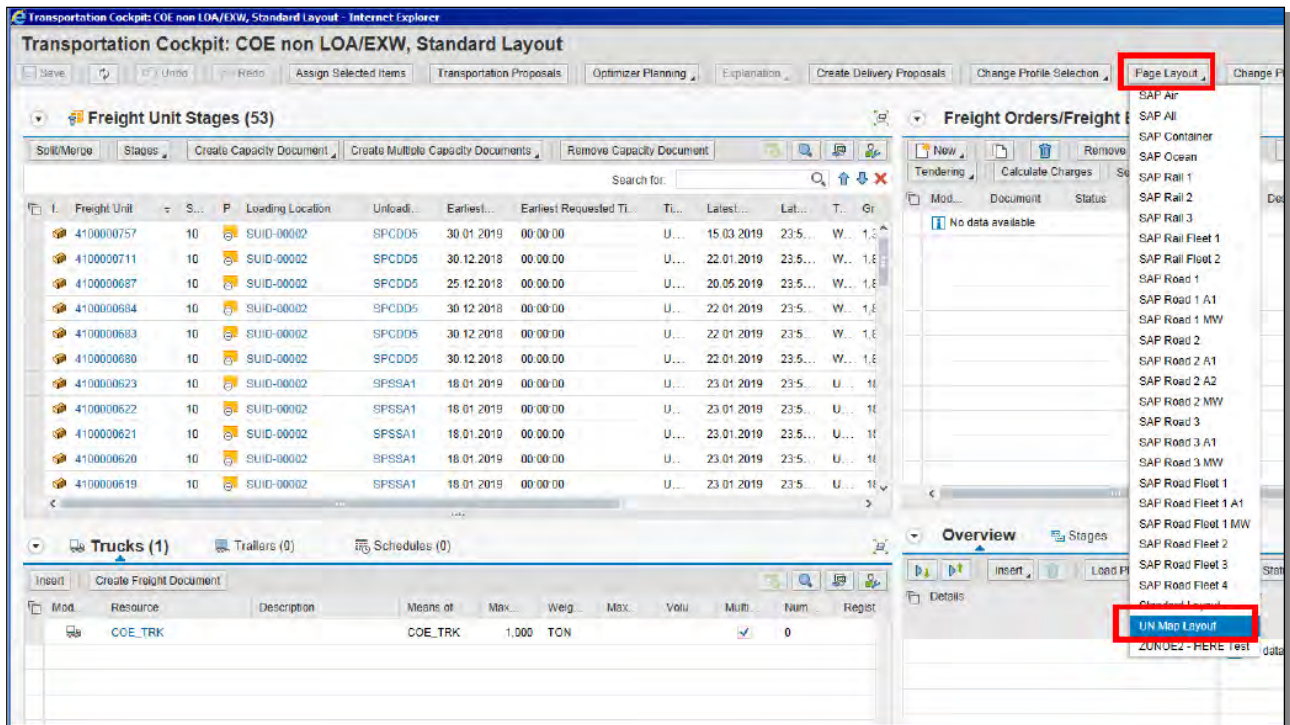
- By adding the **MOU Ref.** (Memorandum of Understanding Reference number), we will get different results after clicking on **Apply**.





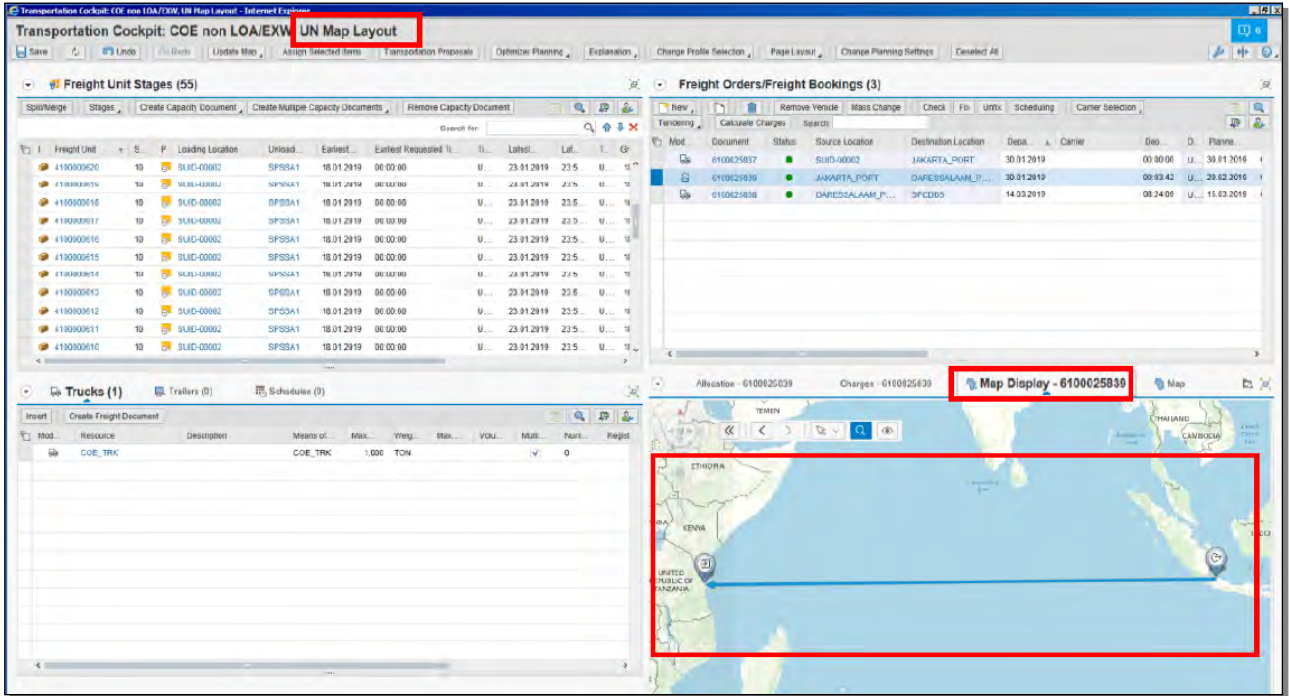
## Personalize the Transportation Cockpit

A UN customized layout has been built for the Transportation Cockpit. This layout allows displaying the map for the Freight Orders. In order to select the customized layout, click on the “Page Layout” button and select the “UN Map Layout” option.

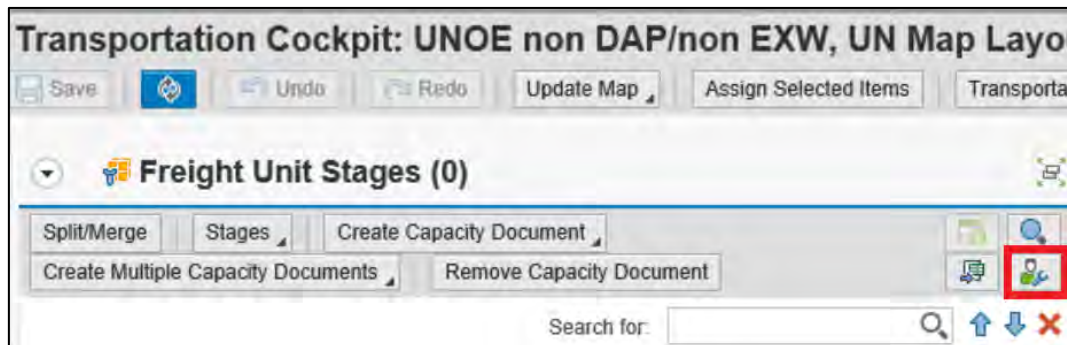



The “UN Map Layout” is applied to the Transportation Cockpit screen.

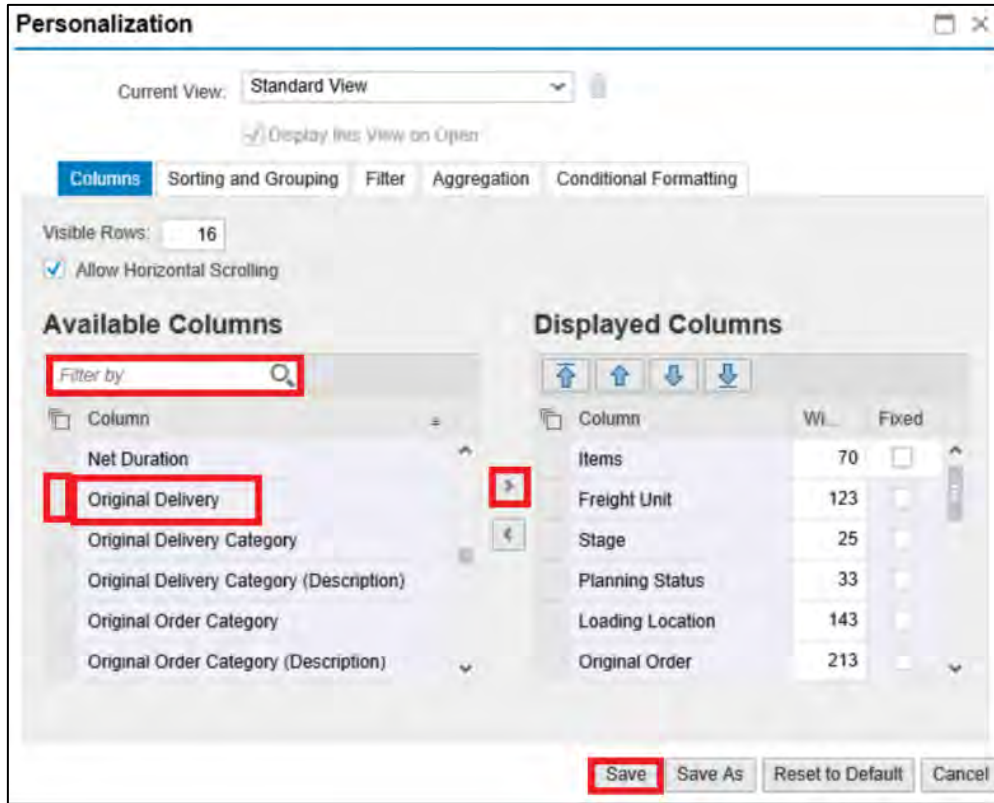




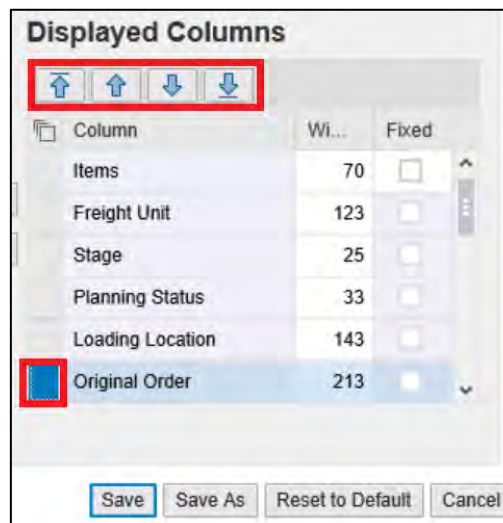
The cockpit layout can be further adjusted by clicking on “Personalize”.



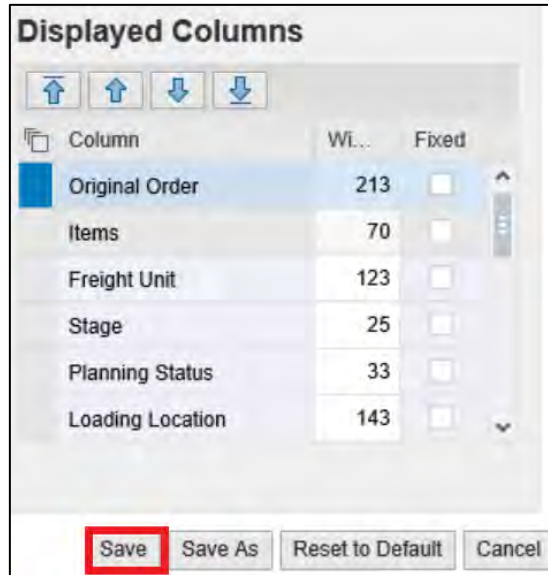
Additional available columns can be added to the displayed columns. Either search for the column name through the “filter by” function or scroll through the fields. Mark the column(s) to be added and click on “add item” . After all columns are added click “Save”.




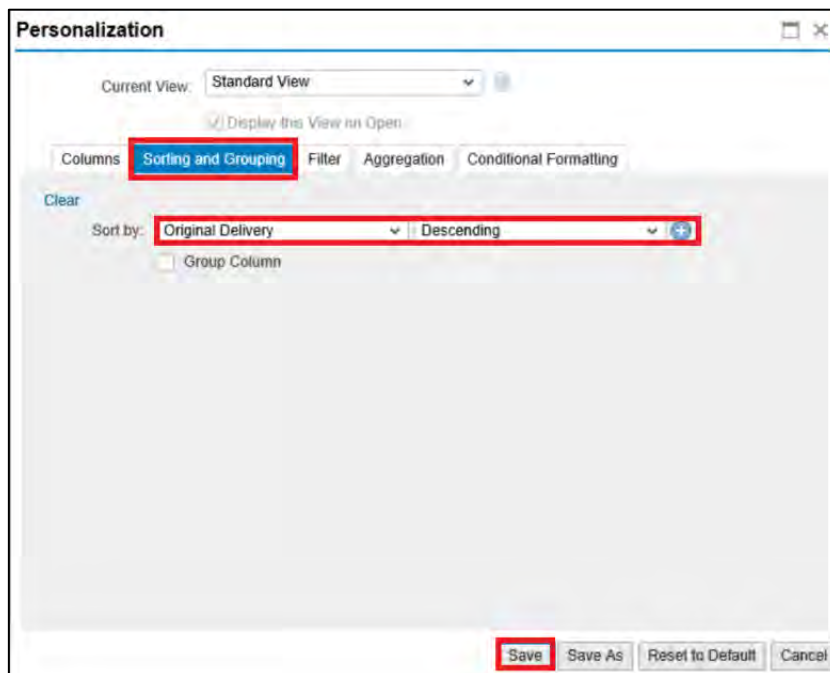
The order in which the “Displayed Columns” show in the cockpit can be changed in sequence through marking the line and the moving the column(s) up or down by using the arrows.



After shifting the column to the desired position, press “Save”. The column sequence can also be changed in the cockpit through drag&drop.



The displayed entries in the cockpit can also be sorted. Choose the column the entries should be sorted by on the “Sorting and Grouping” tab, choose ascending or descending, then press either “Save” or choose further sorting criteria by adding line(s) .



### Personalize Transportation Proposals

The transportation proposal list can be personalized as well. Click on the personalize button on the right.

**Transportation Proposals: Standard Layout**

Accept Route Cancel Accept Planning Optimizer Explanation Page Layout

Transportation Proposals

Define Filter

Document Hierarchy	Selected	P	M	Means of Transport	Source Location	Destination Location	Loading Start...	Unloa...	D...	D	Duration	Carrier
Transportation Proposal 1	<input type="checkbox"/>			UNOE_SEA	SPHTA9	SPITA2	21.10.2020 23:...	14.11....	K..		550.49	
Freight Unit 4100004022	<input type="checkbox"/>			UNOE_SEA	SPHTA9	SPITA2	21.10.2020 23:...	14.11....	K..		550.49	
Stage 00001	<input type="checkbox"/>			UNOE_TRK	SPHTA9	PORT-AU-PRINCE_PORT	21.10.2020 23:...	22.10....	2...	K..	02	
Stage 00002	<input type="checkbox"/>			UNOE_SEA	PORT-AU-PRINCE_PORT	GENOA_PORT	22.10.2020 00:...	13.11....	7...	K..	540.09	
Stage 00003	<input type="checkbox"/>			UNOE_TRK	GENOA_PORT	SPITA2	13.11.2020 17:...	14.11....	8...	K..	10.37	
Transportation Proposal 2	<input type="checkbox"/>			UNOE_SEA	SPHTA9	SPITA2	21.10.2020 23:...	14.11....	K..		551.44	
Freight Unit 4100004022	<input type="checkbox"/>			UNOE_SEA	SPHTA9	SPITA2	21.10.2020 23:...	14.11....	K..		551.44	
Stage 00001	<input type="checkbox"/>			UNOE_TRK	SPHTA9	PORT-AU-PRINCE_PORT	21.10.2020 23:...	22.10....	2...	K..	02	
Stage 00002	<input type="checkbox"/>			UNOE_SEA	PORT-AU-PRINCE_PORT	BARI_PORT	22.10.2020 00:...	13.11....	7...	K..	541.58	
Stage 00003	<input type="checkbox"/>			UNOE_TRK	BARI_PORT	SPITA2	13.11.2020 18:...	14.11....	7...	K..	9.43	

Columns can be added or removed from the displayed view through the arrows.

**Personalization**

Current View: Standard View

Display this View on Open

Columns | Sorting | Conditional Formatting

Visible Rows: 34

Allow Horizontal Scrolling

**Available Columns**

Filter by

- Default Route
- Earliest Acceptable Delivery Date/Time
- Earliest Acceptable Pick-Up Date/Time
- Earliest Requested Delivery Date/Time
- Earliest Requested Pick-Up Date/Time
- Execution Type (Desc.)

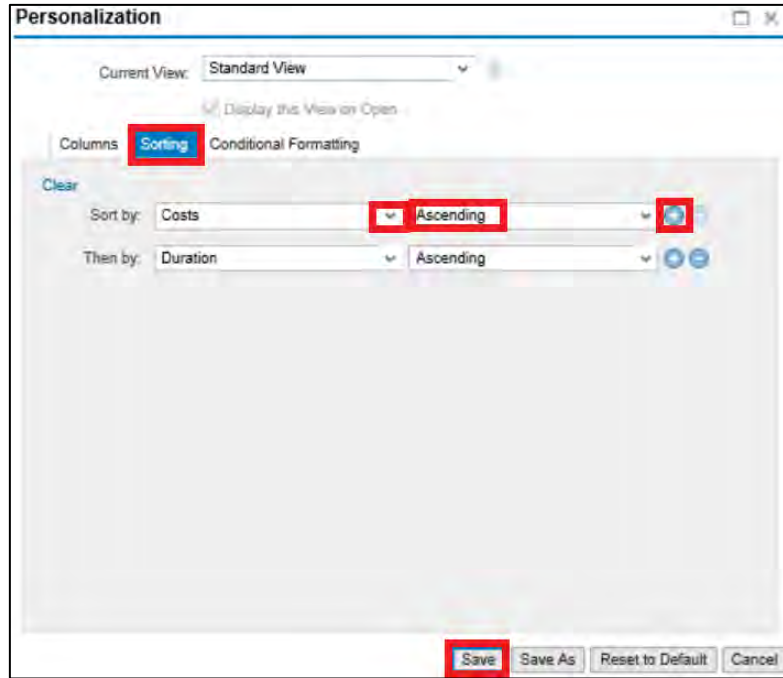
**Displayed Columns**

- Master Column (Width: 204)
- Selected (Width: 70)
- Planning Status (Width: 25)
- Mode of Transport (Width: 25)
- Means of Transport (Width: 137)
- Source Location (Width: 162)

Save Save As Reset to Default Cancel

The transportation proposals can be sorted. Go to the “Sorting” tab and choose a field to sort by and if sorting should be ascending or descending. If desired add additional sort criteria by pressing the plus sign. When done press “Save”.

Please note that the field “Transportation Costs” is only used for internal purposes. This field does not reflect real transportation cost for this route but only a value to prioritize the lane in the cockpit proposals. If the lane cost is 1 (per km), the lane would be preferred over one with lane cost 999.



## Chapter 4. UNOE Detailed Process & Integration with SRM/ECC

The UNOE goods purchasing process starts in SRM. To satisfy TM requirements in terms of transportation network, route planning and responsibility mapping, some changes and/or reinforcements of correct SRM usage need to be considered. TM gets data relevant for transportation planning from inbound deliveries in ECC.

### SRM Shopping Cart and Purchase Orders

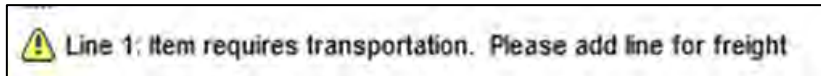
The shopping cart (SC) and purchase order (PO) creation in SRM has impact on the transportation planning in TM. It is important that the correct purchase group is selected as this group influences the responsibilities in TM.

The screenshot displays the 'Create Shopping Cart' interface. The main window title is 'Create Shopping Cart: 1000501370'. It includes a header with 'Number: 1000501370', 'Name: demo', 'Status: In Process', 'Created On: 12.12.2019 10:51:51', and 'Created By: 11TMSAREGDRP 11TMSAREGDRP'. The 'General Data' section shows 'Buy on Behalf of: 1110050066' and 'Approval Note'. The 'Item Overview' section shows a table with columns for Line Number, Item Type, Product ID, Product Cat, and Total Value. A 'Change Default Settings' dialog box is open, showing 'Item Basic Data' for 'Medical Claims Serv' with a 'Purchase Group' of 'UNGSC - Procurement Unit -1'. A 'Hit OK' button is visible over the dialog.

The delivery address in SRM needs to be selected from a dropdown. No manual adjustments should be made to the delivery address in SRM as otherwise the address cannot be matched to a shipping point in TM, which could lead to network errors during transport planning.

The screenshot displays the 'Create Shopping Cart' interface, showing the 'Details for Item 1' section. The 'Delivery Address' tab is selected, showing a dropdown menu for 'Name' with 'UNIFIL HQ' selected. The address details include 'UN Interim Force in Lebanon', 'Phone Number / Extension: 961 1 925000 (5391)', and 'Country: LB Lebanon'. The 'Additional Name' field is also populated with 'UN Interim Force in Lebanon'. The 'Country' field is set to 'LB Lebanon'.

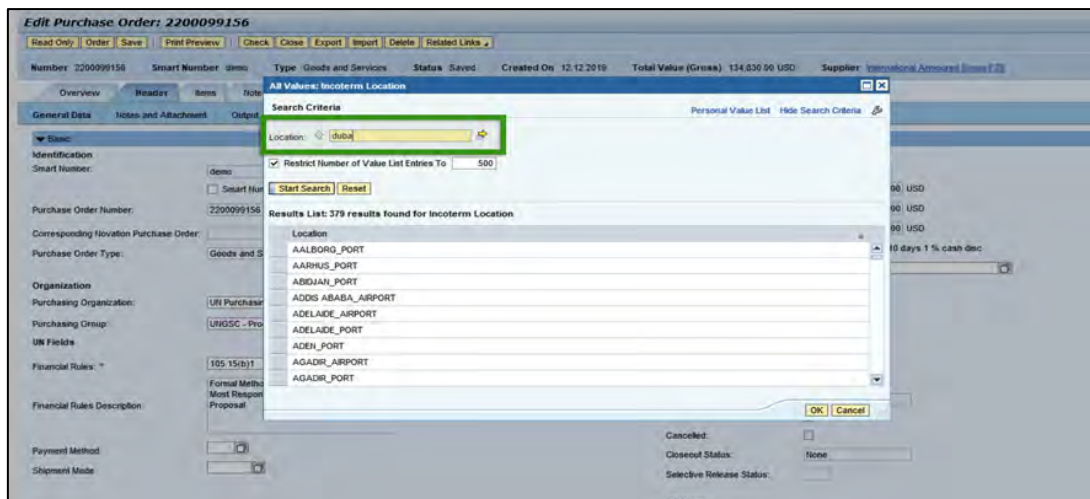
No freight line on SCs for TM relevant orders are required anymore. No freight line should be added. The below warning appears but the SC can be processed further.



On the SRM PO the Incoterm location/Handover Location (HOL) needs to be selected from a dropdown menu for all non-EXW and non-DAP goods purchase orders. This HOL location represents a TM location and is connected to a transportation network, therefore no manual entries are possible as the network would be missing. Exceptions are DAP and EXW, here the Incoterm location field is free text, but the entry could also be selected from the dropdown if the correct entry is available.



Search or choose the correct HOL as per contract and as agreed with goods vendor.



After the goods PO was approved in SRM it is replicated in ECC.

Material Goods 2200102598 Vendor 1110000106 A TO Z SERVICES

Texts Address Communication Partners Additional Data Org. Data

Purch. Org. 1000 United Nations PurOr  
 Purch. Group 101 UNIFIL Proc Unit-1  
 Company Code 1000 United Nations

Material Goods 2200102598 Vendor 1110000106 A TO Z SERVICES ( Doc. date 19.09.2019

Delivery/Invoice Conditions Texts Address Communication Partners Additional Data Org. Data Status Payment Processing

Payment Terms 2012 Currency USD  
 Payment in 30 days 0.000 % Exchange Rate 1.00000  Exch. Rate Fixed  
 Payment in 0 days 0.000 %  
 Payment in 0 days net  
 Incoterms FCA AL MAKTOUM AIRPORT  GR Message

S..	Itm	A	I	Material	Short Text	PO Quantity	O...	C	Deliv. Date	Net Price	Curr...	Per	O...	Matl Group	Plnt
	1	A		2100000967	Earth Station:Satellite	1	EA	D	19.09.2019	1,000.00	USD	1	EA	43221700	LB10
	2	A		2100000967	Earth Station:Satellite	1	EA	D	19.09.2019	1,000.00	USD	1	EA	43221700	LB10

### ECC Inbound Deliveries (IBD)

Inbound deliveries (IBDs) get created in ECC automatically by an overnight batch job. For goods vendors that use EDI and send Advanced Shipment Notifications (ASN), the IBD will not get created automatically but when the vendor sends the ASN.

Material Goods 2200102598 Vendor 1110000106 A TO Z SERVICES ( Doc. date 19.09.2019

Header

S..	Itm	A	I	Material	Short Text	PO Quantity	O...	C	Deliv. Date	Net Price	Curr...	Per
	1	A		2100000967	Earth Station:Satellite	1	EA	D	19.09.2019	1,000.00	USD	1
	2	A		2100000967	Earth Station:Satellite	1	EA	D	19.09.2019	1,000.00	USD	1

Item [ 1 ] 2100000967, Earth Station:Satellite

Material Data Quantities/Weights Delivery Schedule Delivery Invoice Conditions Account Assignment Te

Conf. Control Inbound Delivery Order Ack.  Ackowl.Reqd  Rejection

CC	D	Delivery D...	Time	Quantity	Reference	Created on	Inb. Deliv.	Itm	HL It...	Batch	Quantity Red...
IA	D	29.09.2020		3		23.09.2020	180080269	0	0		0

### Packing of IBD

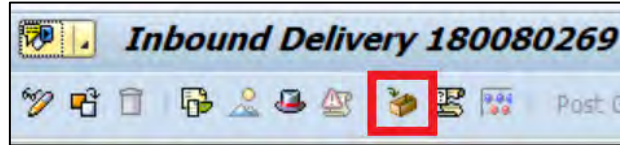
The IBD should be packed according to how the materials/equipment etc will be shipped. The packaging information will be displayed on the Statement of Work (SOW) in TM; therefore, it is important that the correct packaging (HUs) is reflected in ECC. The goods vendor should provide packaging information. For all non-EXW/non-DAP cases a "cargo information" event exists in



TM/CCP that should be submitted by the vendor at least 44 days before delivery date at the HOL after the cargo packaging information was uploaded in CCP.

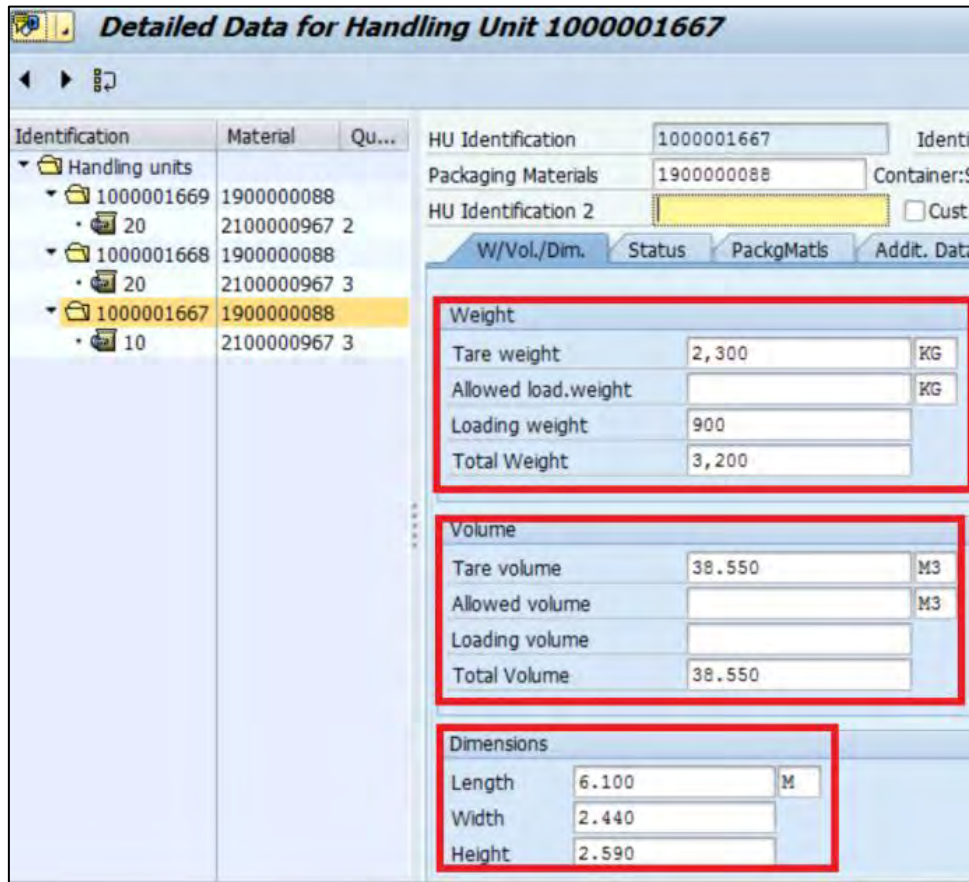
To pack the IBD click in “edit” mode on the pack button. For detailed packaging instructions please refer to the job aid:

[https://ilearn.umoja.un.org/content/courses/IP-LE-06/Job\\_Aid\\_SCM-MT\\_%20Perform\\_Packing\\_on\\_Inbound\\_Delivery.pdf](https://ilearn.umoja.un.org/content/courses/IP-LE-06/Job_Aid_SCM-MT_%20Perform_Packing_on_Inbound_Delivery.pdf)



It is important that weight, volume, and dimensions including their unit of measures are entered per HU. For standard packages such as containers and boxes the tare weight, volume, and dimensions should be prefilled from the material master. Please verify complete entries for above data including the UoM and if data are missing, please fill accordingly before saving.

If UoM is missing in the HU, the IBD might get stuck in the queue between ECC and TM.



The IBD in ECC has a “TM Status” tab.

**Inbound Delivery 180080269 Change: Overview**

Post Goods Receipt

Inbound deliv. 180080269 Document Date 23.09.2020

Vendor 1110000106 A TO Z SERVICES (Lebanon) / Beirut-Dora Chromo Street / DXVIII Beirut

Item Overview Shipment Unload Stock placement Status Overview Goods Movement Data **TM Status**

Document Flow

Header Status

Delivery	Ctrl Key	Control Key Description	Life Cycle	Exec. Sts	Confirmation Status	SubCon Sta
180080269	0010	Transfer Inbound Delivery; Order Scheduling inactive	In Process	Not Started	No Confirmation Yet	Carrier Assi

Clicking on the “Document Flow” shows the document numbers created in TM.

**TM Document Flow for Delivery 180080269**

Delivery 180080269

Life Cycle Status In Process  
 Execution Status Not Started  
 Confirmation Status No Confirmation Yet  
 Subcontracting Sts Carrier Assigned

Tendering Status  
 Invoicing Status  
 Execution Block Not Blocked  
 Planning Block Not Blocked

ERP-TM Document Flow	ERP Doc	ERP Item	Schl Line	Quantity	Unit	Status	BTD ID	BTD Descr.	BTD Cat.	BTD Cat.
Inbound Delivery	180080269						180080269	Inbound Delivery 180080269		
Delivery-Based Transportation Requirement	180080269						1100000835	DTR for UNOE 1100000835 (Inbound Delivery 180080269)	02	Delivery-Based 1
Inbound Delivery Item	180080269	10		3	EA		1100000835	DTR for UNOE 1100000835 (Inbound Delivery 180080269)	02	Product
Freight Unit	180080269	10					4100004023	UNOE Planned Frt Unit 4100004023	FU	Freight Unit
Freight Order	180080269	10					6100015628	UNOE Vendor Delivered Frt Order (VNDelv) 6100015628	TO	Freight Order
Freight Order	180080269	10					6100015629	UNOE Vendor Delivered Frt Order (VNDelv) 6100015629	TO	Freight Order
Freight Order	180080269	10					6100015630	UNOE Vendor Delivered Frt Order (VNDelv) 6100015630	TO	Freight Order
Inbound Delivery Item	180080269	20		5	EA		1100000835	DTR for UNOE 1100000835 (Inbound Delivery 180080269)		
Freight Unit	180080269	20					1100000835	DTR for UNOE 1100000835 (Inbound Delivery 180080269)		
Freight Order	180080269	20					4100004023	UNOE Planned Frt Unit 4100004023		
Freight Order	180080269	20					6100015628	UNOE Vendor Delivered Frt Order (VNDelv) 6100015628		
Freight Order	180080269	20					6100015629	UNOE Vendor Delivered Frt Order (VNDelv) 6100015629		
Freight Order	180080269	20					6100015630	UNOE Vendor Delivered Frt Order (VNDelv) 6100015630		

DTR: Representation of the Delivery in TM      Freight Unit: Document used to Plan the Transportation      Freight Order: Automatically planned Vendor leg

As soon as the IBD was saved, a Delivery-Based Transportation Requirement (DTR) and Freight Unit (FU) are created automatically in TM. For shipments that are not EXW, the routes from the goods vendor location up to the HOL are planned automatically.

The status of the documents can also be checked in ECC. Please note that the execution of the shipment is only tracked on the Freight Orders (FO). When the shipment is finalized the Lifecycle status will show “completed”.

Flow	ERP Doc	ERP Item	Schl Line	Quantity	Unit	Status	BTD ID	BTD Descr.
Delivery	180080269					👉	180080269	Inbound Delivery 180080269
Based Transportation Requirement	180080269					👉	1100000835	DTR for UNOE 1100000835 (Inb
Delivery Item	180080269	10		3 EA		👉	1100000835	DTR for UNOE 1100000835 (Inb
Package	180080269	10				👉	1100000835	DTR for UNOE 1100000835 (Inb
Freight Unit	180080269	10				👉	4100004023	UNOE Planned Frt Unit 41000040
Freight Order	180080269	10				👉	6100015628	UNOE Vendor Delivered Frt Order
Freight Order	180080269	10				👉	6100015629	UNOE Vendor Delivered Frt Order
Freight Order	180080269	10				👉	6100015630	UNOE Vendor Delivered Frt Order

Status Name	Code	Status Description
LIFECYCLE	02	In Process
EXECUTION	07	Ready for Transportation Execution
CONFIRMATION	01	No Confirmation Yet
SUBCONTRACTING	03	Carrier Assigned
BLK_EXEC	02	Not Blocked
BLK_PLAN	02	Not Blocked

Each TM document can be accessed from ECC by clicking on the hyperlink. Login data and role assignment for the TM system need to exist.

ERP-TM Document Flow	ERP Doc	ERP Item	Schl Line	Quantity	Unit	Status	BTD ID	BTD Descr.
Inbound Delivery	180080269					👉	180080269	Inbound Delivery 180080269
Delivery-Based Transportation Requirement	180080269					👉	1100000835	DTR for UNOE 1100000835
Inbound Delivery Item	180080269	10		3 EA		👉	1100000835	DTR for UNOE 1100000835
Package	180080269	10				👉	1100000835	DTR for UNOE 1100000835
Freight Unit	180080269	10				👉	4100004023	UNOE Planned Frt Unit 4100
Freight Order	180080269	10				👉	6100015628	UNOE Vendor Delivered Frt
Freight Order	180080269	10				👉	6100015629	UNOE Vendor Delivered Frt
Freight Order	180080269	10				👉	6100015630	UNOE Vendor Delivered Frt
Freight Order	180080269	10				👉	6100015631	UNOE Planned Frt Order (FF
Freight Order	180080269	10				👉	6100015632	UNOE Planned Frt Order (FF
Freight Order	180080269	10				👉	6100015633	UNOE Planned Frt Order (FF

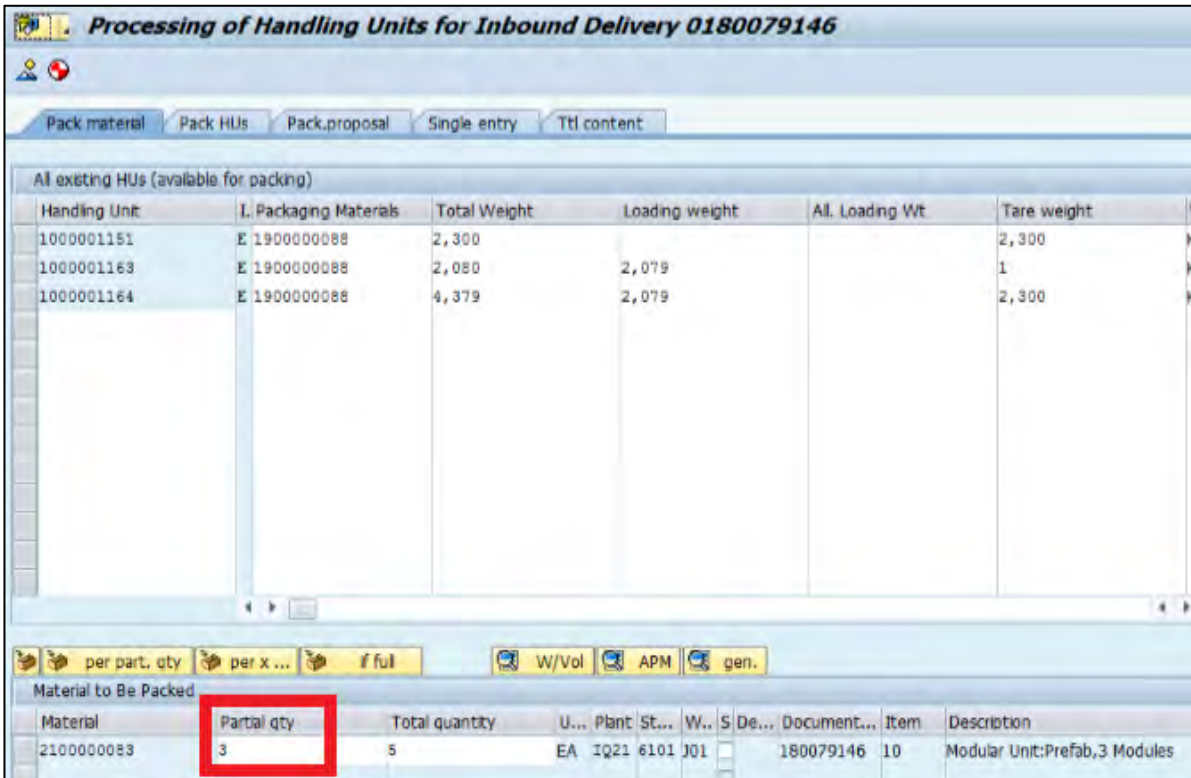
The link might need to be copied and pasted into a new browser window where the TM system is already open.

### Unpacking and repacking of HUs

After the handover of the products took place the VGR will be posted in ECC. In case there is a discrepancy in the quantities on the inbound delivery and the quantity handed over, there might be the need to unpack and repack a Handling Unit. This repacking needs to happen if there is a quantity discrepancy within a Handling Unit. To unpack a Handling Unit, mark the line and click unpack (empty).



The quantities will show open as “Material to Be packed” again at the lower part of the screen. Adjust the “Partial qty” to the amount that was received and repack the Handling Unit.



Adjust the delivery qty on Inbound delivery and save. The VGR can be posted for the quantity received.

### PO Changes after Approval

For cases where the PO needs to be amended (and the IBD needs to be deleted) but Freight Order(s) (FOs) exist already in TM, the FO(s) need to be deleted in TM first. Otherwise the IBD in ECC cannot be deleted and the goods PO cannot be amended. For deletion of FOs please refer to the section Deletion of Freight Order in this document.

Please note that FOs for vendor delivered portions of the shipment get created automatically by TM. The batch job runs every 10 minutes, therefore the IBD should be deleted immediately after FO deletion as otherwise new FO(s) might get created in the meantime.

## Delivery Based Transportation Requirement (DTR) in TM

The Delivery Based Transportation Requirement (DTR) is based on the IBD data from ECC and reflects the shipment requirement. There is a 1:1 relationship between DTR and IBD.

The “General Data” tab shows among other data a summary of volume/weight, Incoterm & location, and the Sales Group, which reflects the responsibility for this shipment requirement.

Display DTR for UNOE 110000835 (Inbound Delivery 180080269)

Save Cancel Edit Follow Up

General Data Business Partner Locations and Dates/Times Document Flow Notes Change Documents Blocking Information

Delivery Details		Statuses	
Document Type:	ZD01	Life Cycle Status:	In Planning
Original Delivery:	Inbound Delivery	Execution Status:	Execution Not Started
Delivery Type:	EL	Planning Status:	Partially Planned
Service Lvl - Sales:		Delivery Blocked:	<input checked="" type="checkbox"/> Not Blocked
		Shipment Planning Blocked:	<input checked="" type="checkbox"/> Not Blocked
		Planning Block:	<input checked="" type="checkbox"/> Not Blocked
		Execution Block:	<input checked="" type="checkbox"/> Not Blocked

Shipping	
Delivery Priority:	
Transportation Mode:	

Quantities		
Gross Volume:	115.65	M3
Gross Weight:	9.300	KG
Net Weight:	2.400	KG

Organizational Data		
Sales Organization:	SQ_1000	United Nations Sales Org
Sales Office:		
Sales Group:	SG_101	UNIFIL Proc Unit-1

Statuses of Original Delivery		
Planning Status:	Not Relevant	
Picking Status:	Not Relevant	
Packing Status:	Completely Processed	

Incoterms		
Incoterm:	FCA	Free Carrier
Incoterm Location:	AL MAKTUUM_AIRPORT	
Incoterm Location (Free Text):	AL MAKTUUM_AIRPORT	

The “Business Partner” tab shows the shipper/sending plant and the consignee/receiving plant. The “Items” tab shows the material details to be shipped and how they are packed (HUs).

Display DTR for UNOE 110000835 (Inbound Delivery 180080269)

Save Cancel Edit Follow Up

General Data **Business Partner** Locations and Dates/Times Document Flow Notes Change Documents Blocking Information

Party Role	Business Partner	Devial. Address	Name	Street	House No	Postal C...	City	Region (Desc.)	C...	Country (Desc.)
Shipper	1110000106		A TO Z SERVICES (Lebanon	Beirut-Dora Chromo		IXVIII	Beirut		LB	Lebanon
Consignee	LB10		UN Interim Force in Lebanon	Main Street		1601	Naqoura	Liban-Sud	LB	Lebanon

Items

Item Hierarchy	Item	Item Description	D. Go	Product	Package ID	P	C	E	E	Delivery Quantity	Del. Quantit Unit	Gross Volume	Gross Volume UoM	Gross Weight	Gross Weight UoM
Handling Unit	978			190000088	1000001667					1 EA		38.55 M3		3,200 KG	
Product	10	Earth Station-Satellite		2100000967						3 EA				3 KG	
Handling Unit	979			190000088	1000001668					1 EA		38.55 M3		3,200 KG	
Product	20	Earth Station-Satellite		2100000967						3 EA				3 KG	
Handling Unit	980			190000088	1000001669					1 EA		38.55 M3		2,900 KG	
Product	20	Earth Station-Satellite		2100000967						2 EA				2 KG	

The “Locations and Dates/Times” tab shows the source location and address (Goods Vendor location), where the shipment starts and the destination location and address, where the shipment ends (based on Delivery Address chosen from dropdown in SRM).

The delivery date reflects the pick-up date for EXW cases, the delivery date at final destination for DAP cases, and the delivery date at handover location for non-DAP/non-EXW cases.

Display DTR for UNOE 110000835 (Inbound Delivery 180080269)

Save Cancel Edit Follow Up

General Data Business Partner **Locations and Dates/Times** Document Flow Notes Change Documents Blocking Information

Source		Destination	
Source Location:	SU1110000106 A TO Z SERVICES (Lebanon)	Destination Location:	SPLBA1 UNIFIL HQ Naqoura
Pick-Up Date (From):		Delivery Date (From):	29.09.2020 00:00:00 LBANON
Pick-Up Date (To):		Delivery Date (To):	
Earliest Pick-Up Date:		Earliest Delivery Date:	
Latest Pick-Up Date:		Latest Delivery Date:	
Unloading Point:			
Address		Address	
Street/House Number:	Beirut-Dora Chromo Street	Street/House Number:	Main Street
Postal Code/City:	IXVIII Beirut	Postal Code/City:	Naqoura, South Lebanon
Region:		Region:	JA Liban-Sud
Country:	LB Lebanon	Country:	LB Lebanon

Please note that DTR data cannot be changed or deleted directly in TM. Change of data or deletion will be transferred from IBD in ECC to TM.

## Freight Unit (FU) in TM

A **Freight Unit (FU)** represents a set of goods that are transported together across the entire transportation chain (smallest unit that can be transported). The Freight Unit (FU) has a 1:1 relationship with the DTR and is the base document for planning in TM.

The “General Data” tab displays data copied from the DTR and shows under “Organizational Data” which group/unit is responsible for transportation planning and which for freight buying.

**General Information**

Description: 180080269  
 Freight Unit Type: ZFU1 UNOE Planned Frt Unit  
 Shipping Type:  
 Movement Type:  
 Incoterm: FCA Free Carrier  
 Incoterm Location: ALMAKTOUM\_AIRPORT  
 Uringress Goods:  
 No ADR Example:  
 Points also to ADR 1.1.3.8:  
 Freight Unit Billing Rule: ZFU1\_ITM\_UNOE Defaults applied  
 HBL or HAWB: Not Finalized  
 Transportation Mode:

**Transportation**

Total Distance: KM  
 Gross Duration/Total Net Duration: 353.59

**Organizational Data**

Purchasing Organization: PO\_1000 United Nations Purchasing Org.  
 Purchasing Group: PG\_FLB10 FLB10 - FUNIFL  
 Planning and Execution Organization: PE\_1000 United Nations Planning & Execution Org.  
 Org. Unit Group: FE\_FLB10 Planning & Execution LB10

**Required Capacity**

Weight: 9.300 KG  
 Volume: 115.85 M3  
 Pieces: 3 EA  
 Density Factor: 1 / 12.4

**Source**

Location: SU1110000106 A TO Z SERVICES (Lebanon)  
 A TO Z SERVICES (Lebanon) / Beirut-Dora Chromo Street / DV11 Beirut

**Destination**

Location: SPLBA1 UNIFIL HQ Naqoura  
 UNIFIL HQ / Main Street / Naqoura, South Lebanon

The “Document Flow” tab shows predecessor documents such as the ECC IBD and successor documents such as Freight Order(s) (if yet available).

Document Hierarchy	Business Document	Business Document Life...	Created By	Created On Date/Time	Changed By	Changed On Date/Time
UNOE Planned Frt Unit 4100004023	4100004023	In Process	R1PR5T100PXY	23.09.2020 04:57:33 CET	R1PR5T100PXY	23.09.2020 05:15:08 CET
Predecessor Business Documents						
DTR for UNOE 1100000835 (Inbound Delivery 18008...	1100000835	In Planning	R1PR5T100PXY	23.09.2020 04:57:33 CET	R1PR5T100PXY	23.09.2020 05:15:07 CET
Inbound Delivery 180080269	180080269			23.09.2020 00:00:00 CET		
Successor Business Documents						
UNOE Vendor Delivered Frt Order (VNDeliv) 6...	6100015628	In Process	BTCUSRR5T100	23.09.2020 04:59:32 CET	R1PR5T100PXY	23.09.2020 05:15:08 CET
UNOE Vendor Delivered Frt Order (VNDeliv) 6...	6100015629	In Process	BTCUSRR5T100	23.09.2020 04:59:32 CET	R1PR5T100PXY	23.09.2020 05:15:08 CET
UNOE Vendor Delivered Frt Order (VNDeliv) 6...	6100015630	In Process	BTCUSRR5T100	23.09.2020 04:59:32 CET	R1PR5T100PXY	23.09.2020 05:15:08 CET

The FU “Stages” tab shows only one stage before the planning for EXW and DAP shipments. Non-DAP & non-EXW shipments, will have two stages, one from source to Handover Location (HOL) and one from HOL to final destination. After planning the FU stages will display stages according to the route and means of transport chosen. One stage equals one FO.

If the system has planned the vendor delivered FOs already, there are as many stages as the system created FOs up to the HOL (for non-EXW/non-DAP cases) or to final destination (for DAP cases).

**Display UNOE Planned Frt Unit 410004023**

Save Cancel Edit Follow Up Check Direct Shipment Split/Merge Unassign Default Route Remove Unplanned Stages Fixing

Execution Customs Output Management **Stages**

Insert Merge Route Schedule Freight Document Set OI Status Determine Distance and Duration Change Incoterm Location Change Destination Location

Stage Des...	Document	Source Location	City (Source)	Requested Pick-Up Date	Departure Date	Destination Location
Stage 1	UNOE Vendor Delivered Frt Order (VNDelv) 6100015628	SU1110000106	Beirut		22.09.2020	NAQOURA_PORT
Stage 2	UNOE Vendor Delivered Frt Order (VNDelv) 6100015630	NAQOURA_PORT	Naqoura	22.09.2020	22.09.2020	JEBEL ALI_PORT
Stage 3	UNOE Vendor Delivered Frt Order (VNDelv) 6100015629	JEBEL ALI_PORT	Dubai	28.09.2020	28.09.2020	AL MAKTUUM_AIRPORT
Stage 4		AL MAKTUUM_AIRPORT	Dubai	29.09.2020		SPLBA1

### Deletion of Freight Unit

Sometimes it is necessary to delete the FU in TM. In cases where a re-planning needs to be done, besides the existing Freight Order(s) if any, the FU needs to be deleted as otherwise the re-planning can only be done with the same routes.

The “Stages” tab shows after planning different stages and the respective Freight Order(s).

Administrative Data Execution Customs Output Management **Stages**

Insert Merge Route Schedule Freight Document Set OI Status Determine Distance and D

Change Destination Location

Stage Description	Planning Status (Description)	Document	Transportation Mode
Stage 1	Planned	UNOE Planned Frt Order (FF Deliv) 6100017210	01 (Road)
Stage 2	Planned	UNOE Planned Frt Order (FF Deliv) 6100017212	03 (Sea)
Stage 3	Planned	UNOE Planned Frt Order (FF Deliv) 6100017211	01 (Road)

After deleting the FOs, the document field is empty on the FU “Stages” tab. To delete the FU, click “Edit” on the upper left.

Save Cancel Edit Follow Up Check Direct Shipment Split/Merge Unassign Default Route Remove Unplanned

Administrative Data Execution Customs Output Management **Stages**

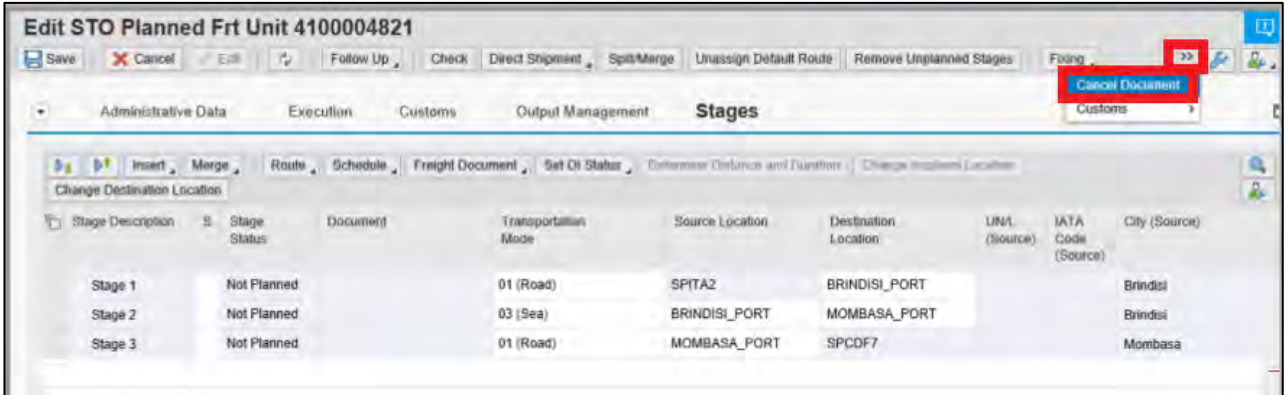
Insert Merge Route Schedule Freight Document Set OI Status Determine Distance and Duration Change Incoterm

Change Destination Location

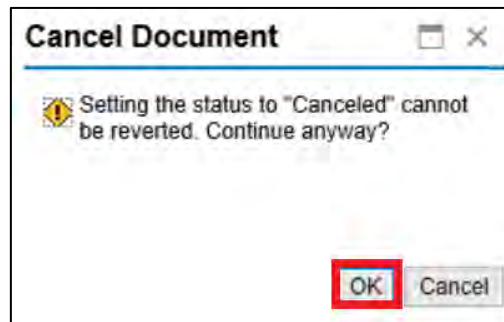
Stage Description	Stage Status	Document	Transportation Mode	Source Location	Destination Location
Stage 1	Not Planned		01 (Road)	SPITA2	BRINDISI_PORT
Stage 2	Not Planned		03 (Sea)	BRINDISI_PORT	MOMBASA_PORT
Stage 3	Not Planned		01 (Road)	MOMBASA_PORT	SPCDF7

Click on the ‘arrows’  on the upper right. Choose “Cancel Document”.

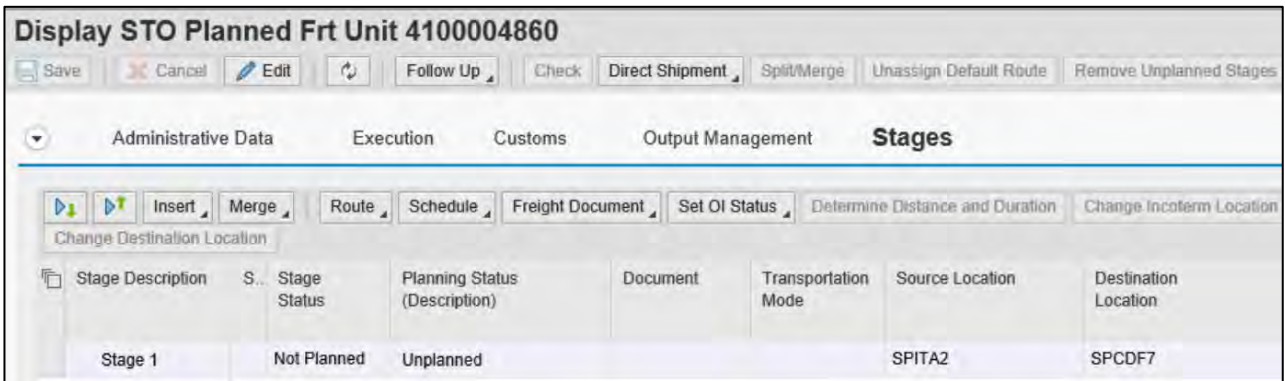




Confirm with "OK". The FU is now deleted. The system will generate a new FU automatically.



The newly created FU has only one unplanned stage in this case. New planning can now be executed.



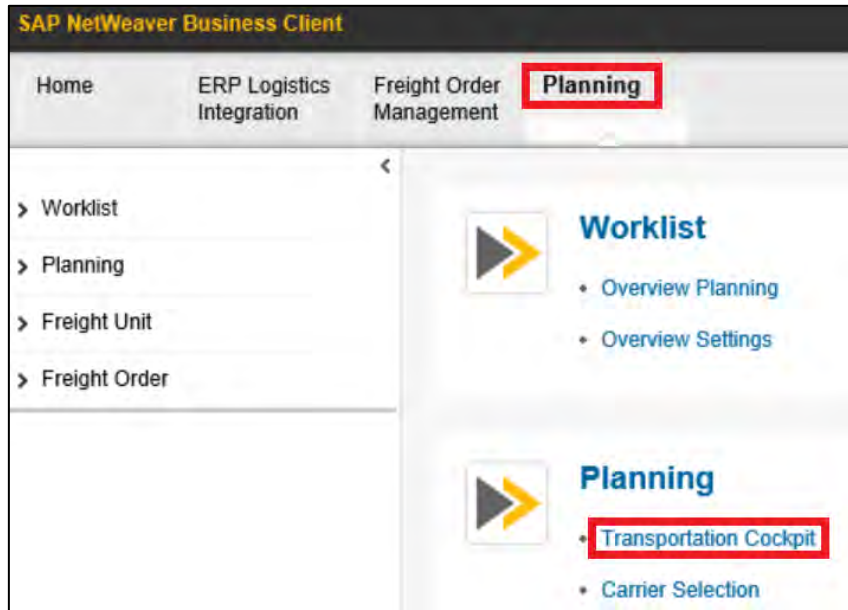
Please note that the example is an STO Freight Unit and not UNOE goods purchases, but the process is the same.

## UNOE Planning Profiles

The transportation requirements/FUs need to be planned in TM by the user depending on the Incoterm. For UNOE, DAP shipments and so-called vendor legs for parts of non-DAP/non-EXW shipments up to the Handover location (HOL) are planned automatically by the system. EXW shipments and parts of shipments from HOL to final destination need to be planned by UN staff. The Incoterm steers in TM if the planning is done backward or forward. In general, for DAP shipments the Delivery Date defines the arrival at the mission/entity and the planning is done backwards from that date, for EXW the shipments are planned forward.

If the delivery date is too close to the current date, the system will propose air routes.

The Transportation Cockpit can be found under the 'Planning' section.



To execute the planning, 'planning profiles' need to be set up. For UNOE there are currently four different profiles.

**UNOE DAP** – for DAP shipments where the Goods Vendor plans and executes the transport and the UN tracks the shipments. The Freight Units for DAP shipments get automatically planned by TM.

**UNOE EXW** – for EXW shipments where the UN plans the transport. The transportation planner needs to choose the route for the shipment.

**UNOE non DAP/non EXW** – for shipment parts from HOL to final destination for non-DAP/non-EXW shipments where the UN plans the transport.

**UNOE vendor leg non DAP** – for shipment parts from origin to HOL for non-DAP/non-EXW shipments, the UN tracks the vendor shipment up HOL. The Freight Units for vendor legs get automatically planned by TM.

Transportation Cockpit: Profile and Layout Sets

Continue Start Planning as Background Job Switch Start Screen Layout Per

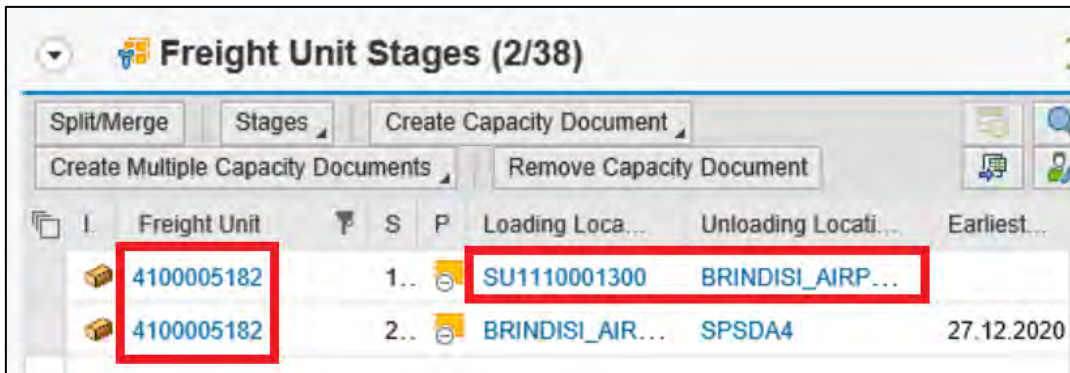
Profile and Layout Sets (5)

Save New Copy Refresh Unplanned Requirements Refresh Job Status


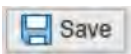
Description	N Freight Unit Selection Profile	T Freight Order Selection Profile	F C I S S S Planning Profile	Transportation Cockpit Layout
UNOE DAP	ZSEL_FU_UNOE_SUPPLIER_DELIVERED	ZSEL_FO_UNOE_SUPPLIER_DELIVERED	ZPLN_UNOE_VENDOR_DEL	UN Map Layout
UNOE EXW	ZSEL_FU_UNOE_EXW_FORWARDER_DELIVERED	ZSEL_FO_UNOE_FORWARDER_DELIVERED	ZPLN_UNOE	UN Map Layout
UNOE non DAP/non EXW	ZSEL_FU_UNOE_FORWARDER_DELIVERED	ZSEL_FO_UNOE_FORWARDER_DELIVERED	ZPLN_UNOE	UN Map Layout
UNOE vendor leg nonDA	ZSEL_FU_UNOE_SUPPLIER_DEL_STAGE	ZSEL_FO_UNOE_SUPPLIER_DELIVERED	ZPLN_UNOE_VENDOR_DEL	UN Map Layout

Please note: It is very important to set the planning profiles up with the correct selections for the “Freight Unit Selection Profile”, “Freight Order Selection Profile”, and “Planning Profile” as otherwise the Freight Order types could be wrong, which could lead to wrong reporting. The planning profiles must be set up once by each user with the first usage of the cockpit (with values seen on screenshot) and saved.

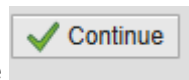
Additionally, please note, that if the cockpit was started through the “Follow Up” function of the DTR, and even though a planning profile was selected, the system shows all FU stages to be planned. This is critical for UNOE planned shipments with vendor leg (non DAP/non EXW).



Please do not plan the stage from Vendor location to Handover location with the non DAP/non EXW planning profile as then the FO type and SOW would show incorrectly. Ideally, the UNOE planned part of the shipment is planned after the system automatically created FOs for the vendor part. If the vendor part of the shipment needs to be re-planned, please refer to section Re-Planning of Vendor Delivered Freight Order of this document.

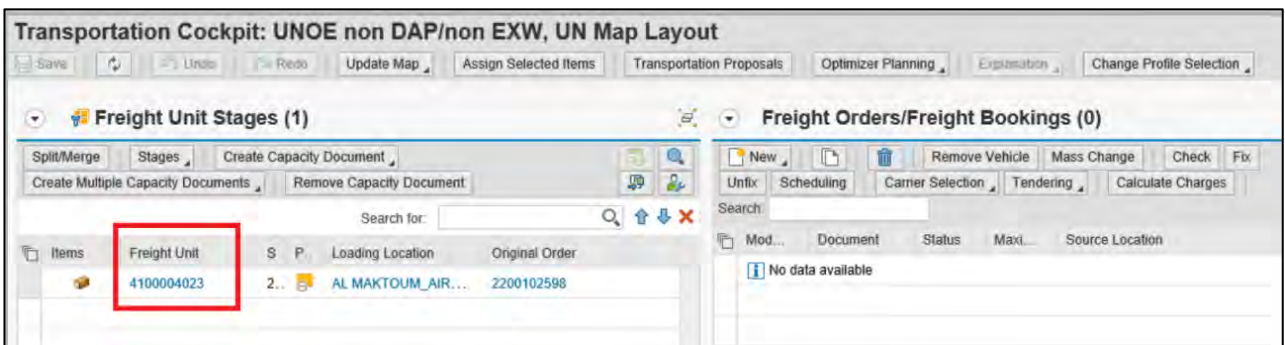
To create a new profile, press “New” . After settings are entered press “Save” .

The UNOE DAP and UNOE vendor leg non-DAP profile entries should be checked from time to time to make sure that no Freight Units stay unplanned. This could happen when for example Master Data are missing.




After choosing the right planning profile click continue

All Freight Units that have not been planned yet are displayed on the left side of the cockpit.



Look for your Freight Unit(s).

## Route Selection / Freight Order (FO) creation

Please check if the FU that should be planned is completely packed . The packing is done in ECC and in TM the packaging status can be seen in the cockpit in the “Items” column.



= Packages; the shipment has been completely packed.



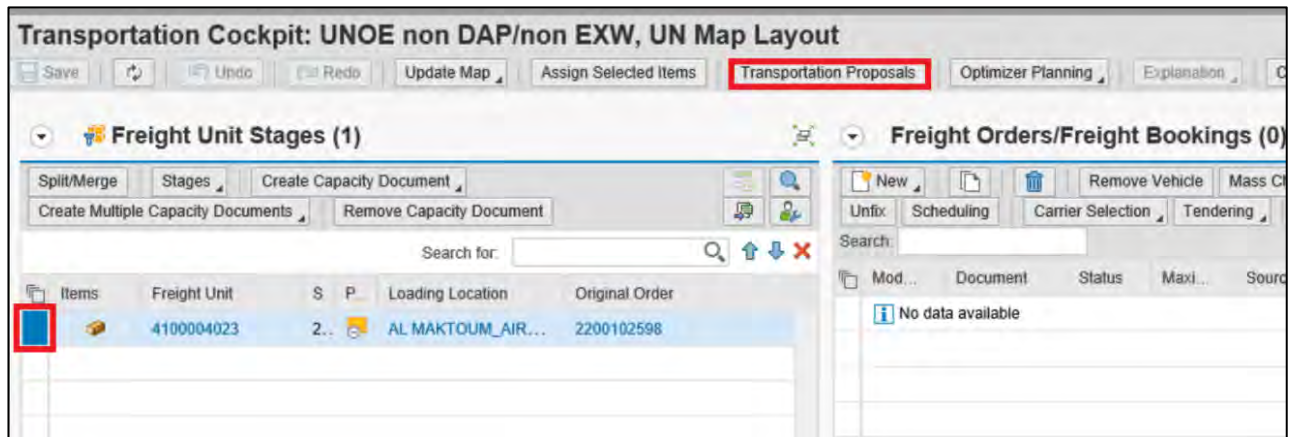
= Products; the shipment has not been packed.





= Mixed; not fully packed.

Please plan only fully packed shipments, otherwise weight/volume/dimensions might be missing and will not show on the SOW, which would lead to incorrect transportation requirements.

Mark the line of the Freight Unit(s) that should be planned and go to ‘Transportation Proposals’ on the upper part of the screen.



The screenshot shows the 'Transportation Cockpit: UNOE non DAP/non EXW, UN Map Layout' interface. The 'Transportation Proposals' button is highlighted in red. Below it, the 'Freight Unit Stages (1)' section contains a table with the following data:

Items	Freight Unit	S	P	Loading Location	Original Order
	4100004023	2..		AL MAKTOUM_AIR...	2200102598

Please note, if you mark two or more FUs the system tries to consolidate those, hence only FUs shipping from the same origin to same destination should be marked together.

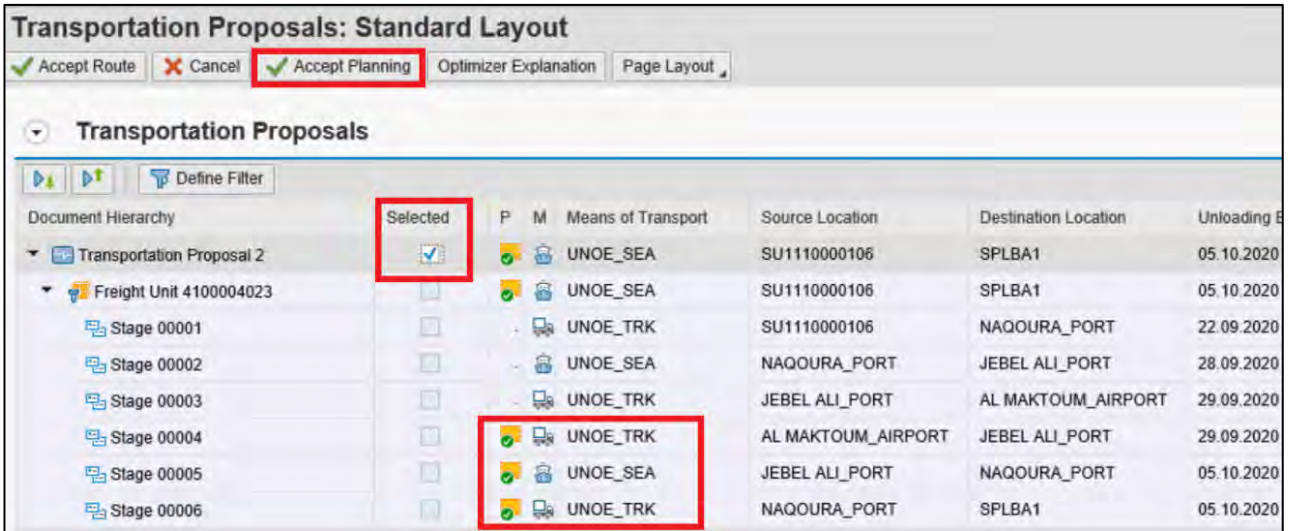
Depending on how many possible connections (lanes) are available the system gives a maximum of 20 proposals. In case there is only one route it gets selected automatically. If an ‘Optimizer Run’ error occurs, it is most likely due to missing master data.



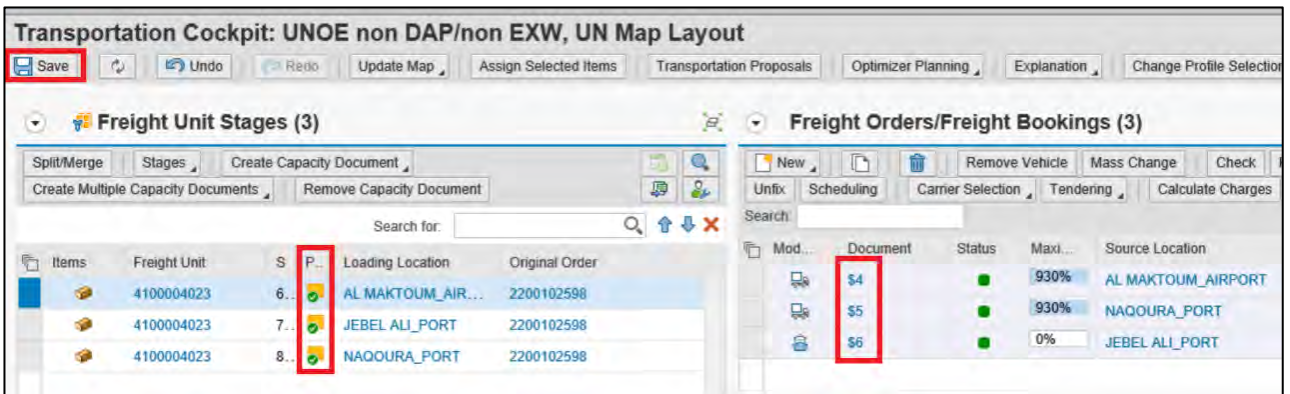
Select the appropriate route by marking ‘selected’.

The “Means of Transport” shows which leg is transported by truck, vessel or plane. Freight Orders are proposed by means of transport and depending on the existing TM transportation network.

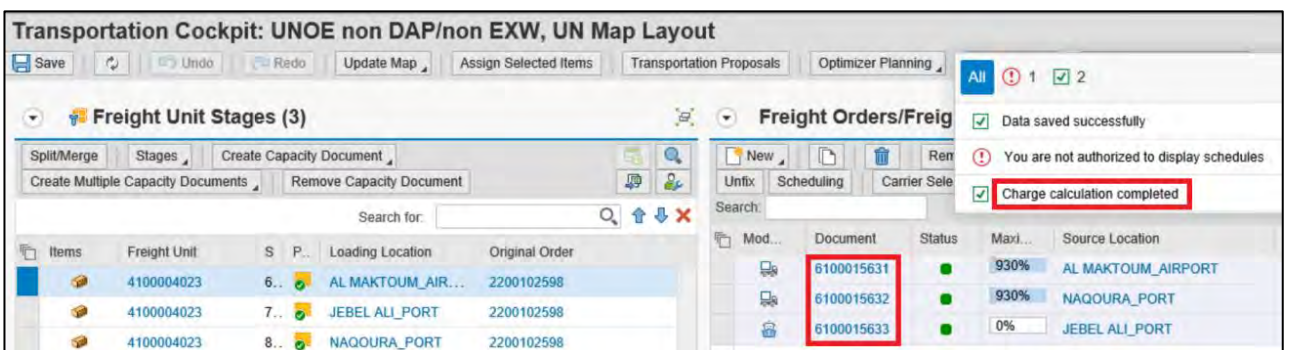
Since the below example is an FCA Incoterm purchase, there are already automatically planned FOs for the vendor leg.



Press 'Accept Planning' and the Freight Order(s) get proposed based on the chosen route.



The FU shows now on the left with 'green check mark' which means that it is planned. The FU was split into the same stages as per route selection. On the right side the Freight Orders (FO) can be seen. The number shows as '\$' until "Save" on the top left is pressed. After saving the system gives a FO number starting with '61...'.  
 The FO is the document where among other data the estimated/actual charges and the SOW are stored. The estimated charge calculation is automatically executed when saving the FO(s). The FOs are used for event submission during the shipment.



The FO is the document where among other data the estimated/actual charges and the SOW are stored. The estimated charge calculation is automatically executed when saving the FO(s). The FOs are used for event submission during the shipment.

Click on the Document '61..' number to get redirected to the FO document.

## Route Selection for Consolidation

If two or more FUs are selected the system tries to consolidate them, hence only FUs shipping from the same origin to same destination should be marked together.

After selecting the FUs that should be consolidated press “Transportation Proposals”.

**Transportation Cockpit: UNOE non DAP/non EXW, UN Map Layout**

Buttons: Save, Undo, Redo, Update Map, Assign Selected Items, **Transportation Proposals**

Freight Unit Stages (37)

Search for: [ ]

Original...	Freight Unit	S	P..	Loading Location	Unloadi...	Original Orde
180080763	4100004969	2..		AMSTERDAM_AIRPORT	SPLBA1	2200102470
180080762	4100004970	2..		AMSTERDAM_AIRPORT	SPLBA1	2200102470
180080761	4100004971	2..		AMSTERDAM_AIRPORT	SPLBA1	2200102470
180080351	4100004310	2..		ADEN_PORT	SPSSA6	2200104372

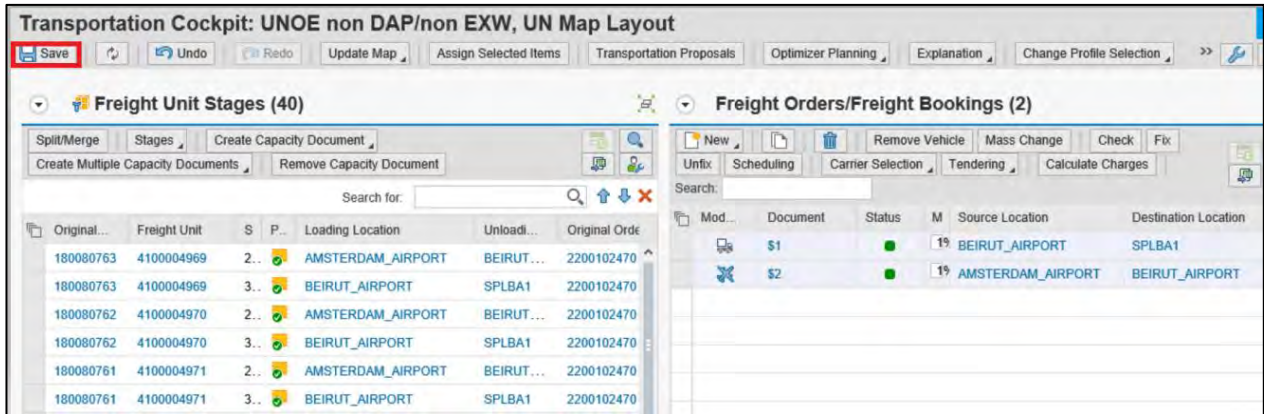
Choose the proposal where the FUs take the same route and are consolidated. Consolidation can be verified through the “Execution Document”, if the number is the same, FUs were consolidated on same FO. Confirm with “Accept Planning”.

**Transportation Proposals: Standard Layout**

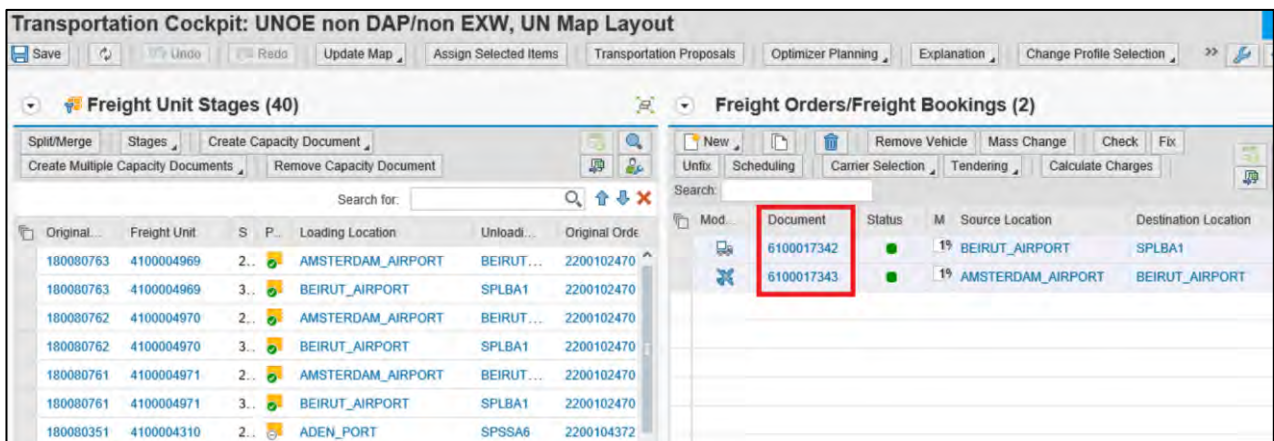
Buttons: Accept Route, Cancel, **Accept Planning**, Optimizer Explanation, Page Layout

Document Hierarchy	Selected	Plann	M	Means of Transport	Source Location	Destination Location	<b>Execution Document</b>	Loading Start Date/...
Transportation Proposal 1	<input checked="" type="checkbox"/>			UNOE_AIR	SU1110001306	SPLBA1	\$2	
Freight Unit 4100004969				UNOE_AIR	SU1110001306	SPLBA1	\$2	
Stage 00001					SU1110001306	AMSTERDAM_AIRPORT		
Stage 00002				UNOE_AIR	AMSTERDAM_AIRPORT	BEIRUT_AIRPORT	\$2	21.12.2020 06:00:0...
Stage 00003				UNOE_TRK	BEIRUT_AIRPORT	SPLBA1	\$1	24.12.2020 17:13:2...
Freight Unit 4100004971				UNOE_AIR	SU1110001306	SPLBA1	\$2	
Stage 00001					SU1110001306	AMSTERDAM_AIRPORT		
Stage 00002				UNOE_AIR	AMSTERDAM_AIRPORT	BEIRUT_AIRPORT	\$2	21.12.2020 06:00:0...
Stage 00003				UNOE_TRK	BEIRUT_AIRPORT	SPLBA1	\$1	24.12.2020 17:13:2...
Freight Unit 4100004970				UNOE_AIR	SU1110001306	SPLBA1	\$2	
Stage 00001					SU1110001306	AMSTERDAM_AIRPORT		
Stage 00002				UNOE_AIR	AMSTERDAM_AIRPORT	BEIRUT_AIRPORT	\$2	21.12.2020 06:00:0...
Stage 00003				UNOE_TRK	BEIRUT_AIRPORT	SPLBA1	\$1	24.12.2020 17:13:2...

Press “Save”.



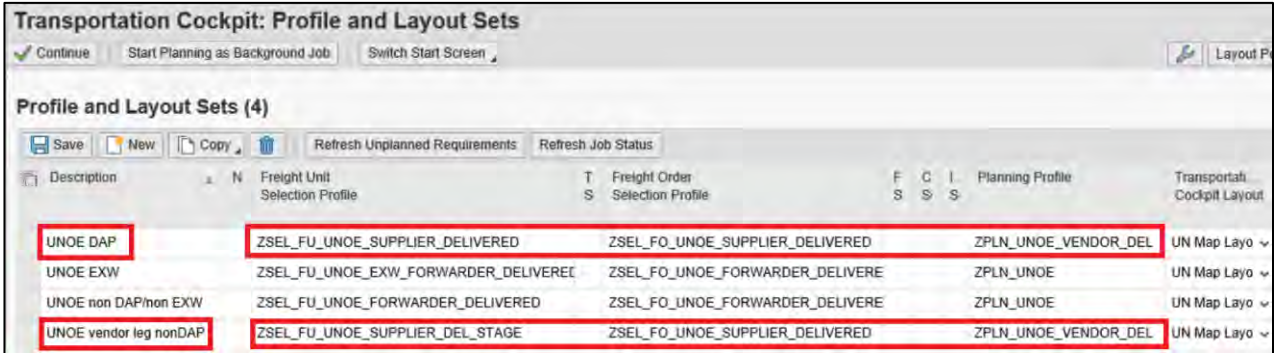
The FOs were created.



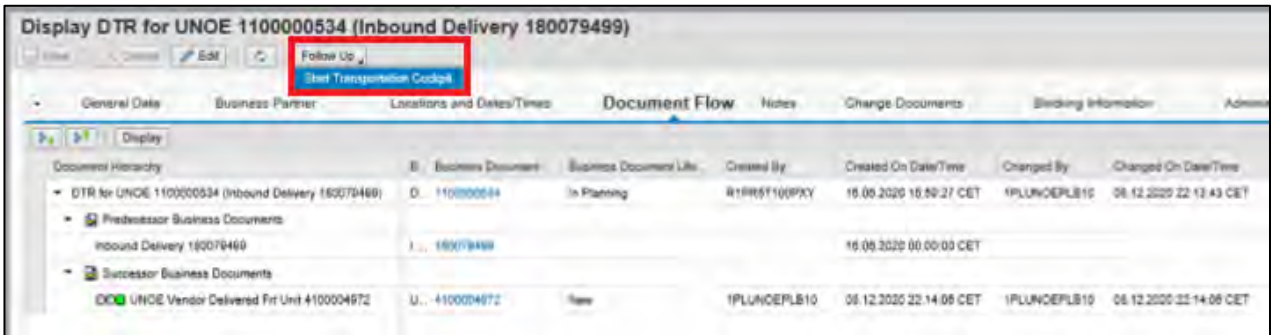
## Re-Planning of Vendor Delivered Freight Order

In some cases, it can be necessary to re-plan vendor delivered shipments (DAP) or the vendor delivered leg(s) of non-DAP/non-EXW Incoterms. A re-planning can become necessary when the system automatically planned the vendor leg(s) with a wrong means of transport or if the chosen route cannot be corrected as desired through established processes (refer to Update Freight Order Dates/Locations/Intermediate Stops section of this document). For guidance on how to delete Freight Order(s) and Freight Unit(s) in TM, please refer to section Deletion of Freight Order and section Deletion of Freight Unit of this document.

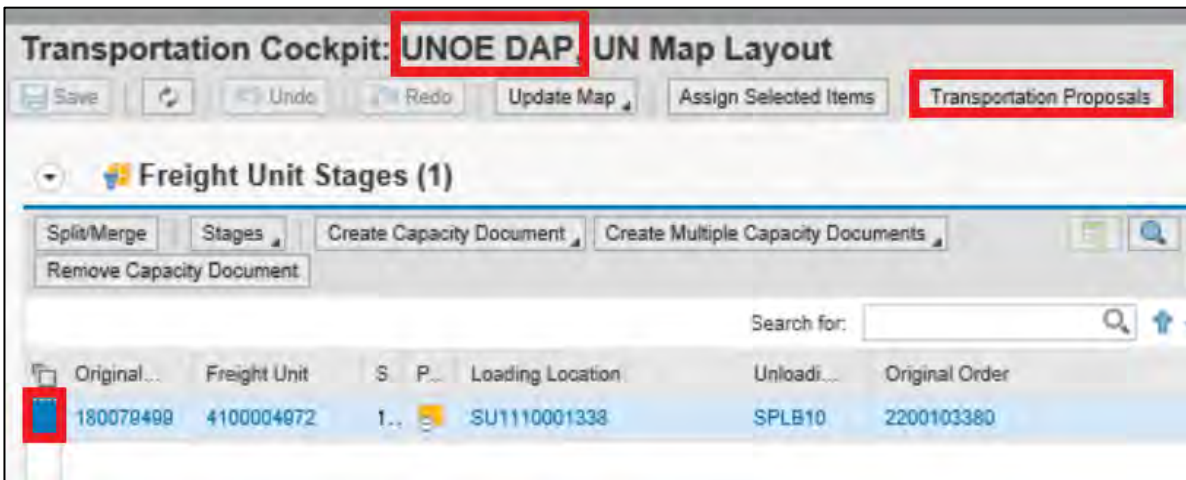
When planning vendor legs manually or after deletion of the original FOs and FU(s), it is important to choose the correct planning profile with correct settings as per below screenshot to (re)-plan a DAP shipment or vendor leg(s) for a non-DAP/non-EXW shipment.



If necessary (for cases with delivery date in the past), the Cockpit can also be started through Follow-up function on DTR or FWO document.



The example case is a DAP shipment that will get re-planned. Mark the FU in the DAP cockpit and choose "Transportation Proposals".



Select the desired route and choose "Accept Planning".



**Transportation Proposals: Standard Layout**

Accept Route  
  Cancel  
  Accept Planning  
 Optimizer Explanation  
 Page Layout

**Transportation Proposals**

Define Filter

Document Hierarchy	Selected	Plann...	M	Means of Transport	Source Location	Destination Location	Execution Document	Loading Start Date/...
Transportation Proposal 9	<input checked="" type="checkbox"/>			UNOE_AIR	SU1110001338	SPLB10	\$27	08.12.2020 08:00:0...
Freight Unit 4100004972	<input type="checkbox"/>			UNOE_AIR	SU1110001338	SPLB10	\$27	08.12.2020 08:00:0...
Stage 00001	<input type="checkbox"/>			UNOE_TRK	SU1110001338	DUESSELDORF_AIRPORT	\$25	08.12.2020 08:00:0...
Stage 00002	<input type="checkbox"/>			UNOE_AIR	DUESSELDORF_AIRPORT	BEIRUT_AIRPORT	\$27	08.12.2020 08:46:4...
Stage 00003	<input type="checkbox"/>			UNOE_TRK	BEIRUT_AIRPORT	SPLB10	\$28	08.12.2020 08:42:5...
Transportation Proposal 10	<input type="checkbox"/>			UNOE_AIR	SU1110001338	SPLB10	\$30	08.12.2020 08:00:0...
Freight Unit 4100004972	<input type="checkbox"/>			UNOE_AIR	SU1110001338	SPLB10	\$30	08.12.2020 08:00:0...
Stage 00001	<input type="checkbox"/>			UNOE_TRK	SU1110001338	COLOGNE_AIRPORT	\$28	08.12.2020 08:00:0...
Stage 00002	<input type="checkbox"/>			UNOE_AIR	COLOGNE_AIRPORT	BEIRUT_AIRPORT	\$30	08.12.2020 08:55:1...
Stage 00003	<input type="checkbox"/>			UNOE_TRK	BEIRUT_AIRPORT	SPLB10	\$29	08.12.2020 08:49:5...

Press "Save".

**Transportation Cockpit: UNOE DAP, UN Map Layout**

Save  
 Undo  
 Update Map  
 Assign Selected Items  
 Transportation Proposals  
 Optimizer Planning  
 Explanation  
 Change Profile Selection  
 Page Layout  
 Change Planning Settings  
 Deselect All

**Freight Unit Stages (3)**

Split/Merge   Stages   Create Capacity Document   Create Multiple Capacity Documents

Remove Capacity Document

Original...	Freight Unit	S	P	Loading Location	Unload...	Original Order	Items
180079499	4100004972	1..		SU1110001338	DUES...	2200103380	
180079499	4100004972	2..		DUESSELDORF_AIRPORT	BEIRUT...	2200103380	
180079499	4100004972	3..		BEIRUT_AIRPORT	SPLB10	2200103380	

Search for:

**Freight Orders/Freight Bookings (3)**

New  
 Remove Vehicle  
 Mass Change  
 Check  
 Fix  
 Unfix  
 Scheduling

Carrier Selection   Tendering   Calculate Charges   Search:

Mod...	Document	Status	M	Source Location	Destination Location	Departu...	Dep...
	8100017347	●	2C	SU1110001338	DUESSELDORF_AI...	08.12.2020	08:00:00
	8100017348	●	2C	BEIRUT_AIRPORT	SPLB10	08.12.2020	08:42:59
	8100017349	●	2C	DUESSELDORF_AIRP...	BEIRUT_AIRPORT	08.12.2020	08:46:40

The new vendor delivered FOs were saved.

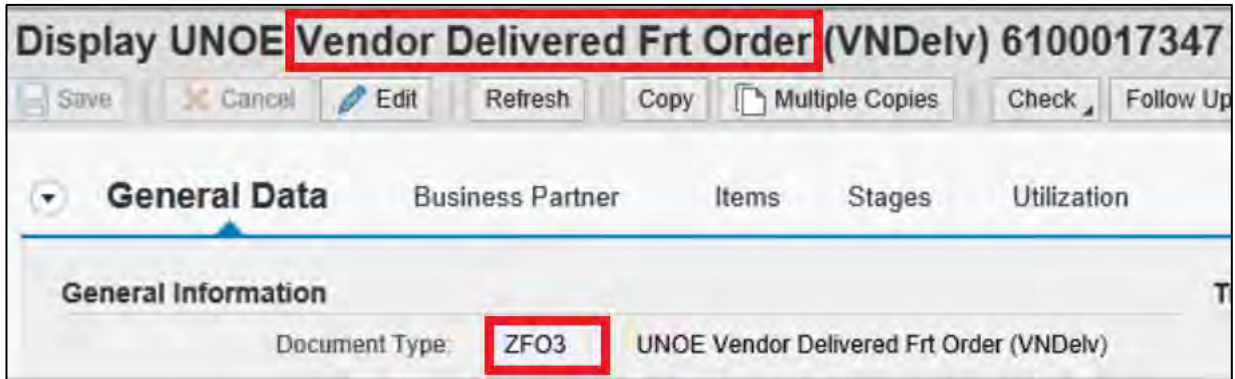
**Freight Orders/Freight Bookings (3)**

New  
 Remove Vehicle  
 Mass Change  
 Check  
 Fix  
 Unfix  
 Scheduling

Carrier Selection   Tendering   Calculate Charges   Search:

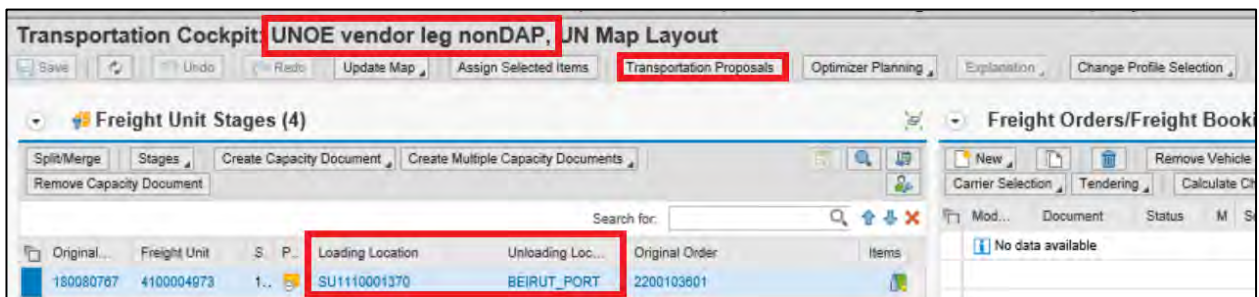
Mod...	Document	Status	M	Source Location	Destination Location	Departu...	Dep...
	<a href="#">8100017347</a>	●	2C	SU1110001338	DUESSELDORF_AI...	08.12.2020	08:00:00
	<a href="#">8100017348</a>	●	2C	BEIRUT_AIRPORT	SPLB10	08.12.2020	08:42:59
	<a href="#">8100017349</a>	●	2C	DUESSELDORF_AIRP...	BEIRUT_AIRPORT	08.12.2020	08:46:40

Documents can be accessed by clicking on the "Document" number. For a DAP shipment all FOs should be "Vendor Delivered Frt Orders". For non-DAP/non-EXW shipments the FOs up to handover location should be "Vendor Delivered Frt Orders".

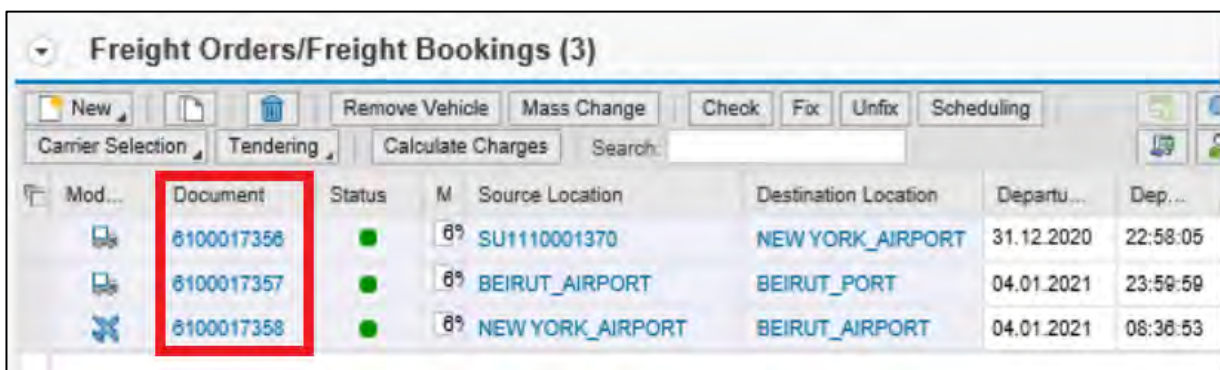


Example for DAT vendor leg planning (applicable for other non DAP/non EXW cases as well).

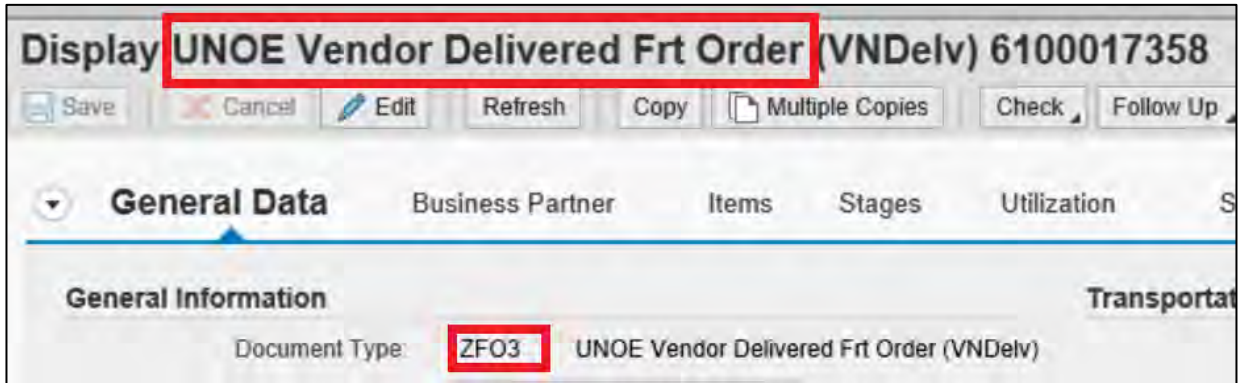
To manually plan the vendor delivered part of a shipment choose the “UNOE vendor leg nonDAP” planning profile. Choose only the FU stage to be planned -> starting at vendor location and shipping to the handover location. Do not select the FU stage from HOL to final destination if shown in the same planning profile. The stage from HOL to destination will only be shown in the vendor leg profile if the cockpit was started through DTR “Follow Up” function. After choosing the correct FU stage, press “Transportation Proposals”.



Select the desired route and choose “Accept Planning” as described above. Then “Save”.



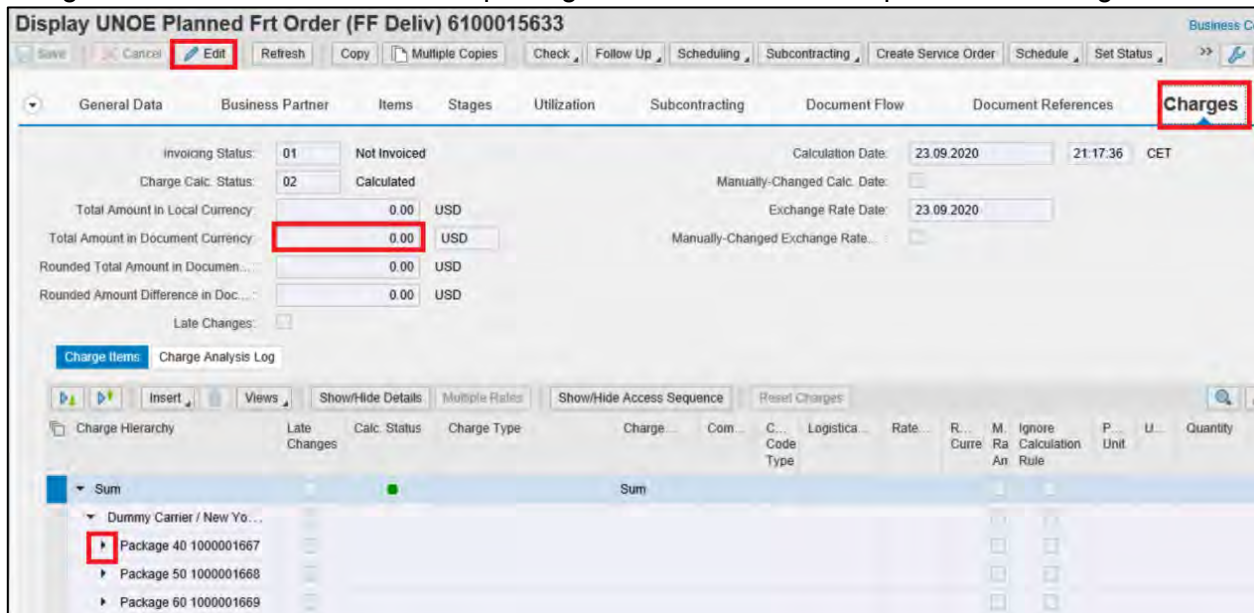
The created FOs should also be “Vendor Delivered Frt Orders”. The route from handover location to final destination need to be planned with the non-DAP/non-EXW planning profile to generate “UNOE Planned Frt Order (FF Deliv)” FOs.



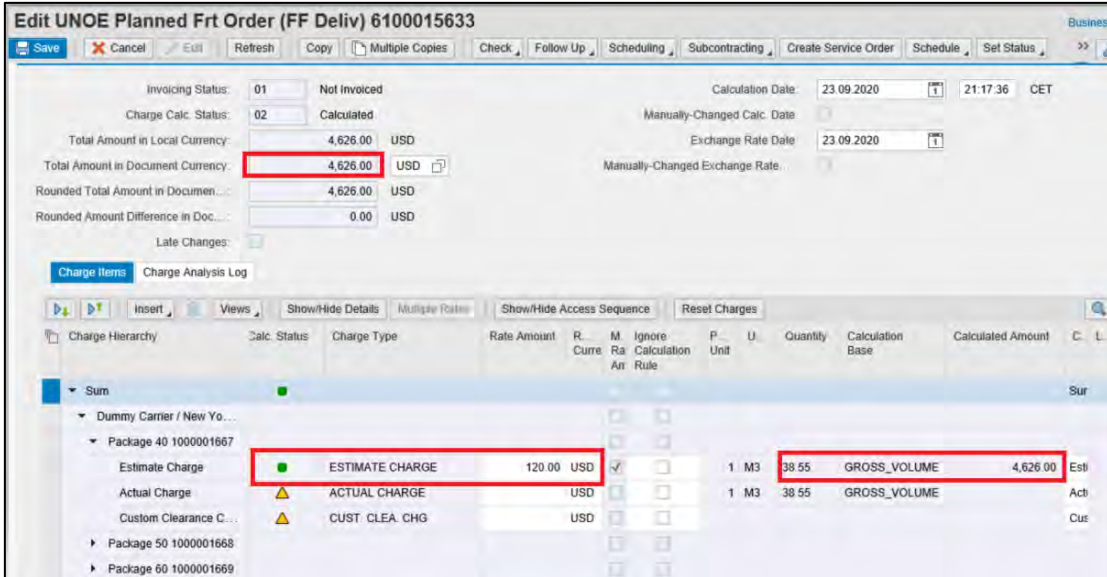
### Charge Calculation

On the FO 'Charges' tab the estimated and actual charges are shown by type of cargo. If an estimated rate for that route exists in the TM charges table, the rate will show automatically in the 'Rate Amount' column. In the below case no rate is available, and therefore the rate amount is empty. In case estimated rates need to be uploaded and/or amended in the charge table, please reach out to the Master Data team.

The transportation planner should enter 'estimated charges' for the movement if no rate was automatically populated or if the rate needs to be corrected. The charges need to be checked/entered for each FO of a shipment. To display the details per package/HU, click on the triangle on the left to the package in the bottom part of 'Charge Items'.

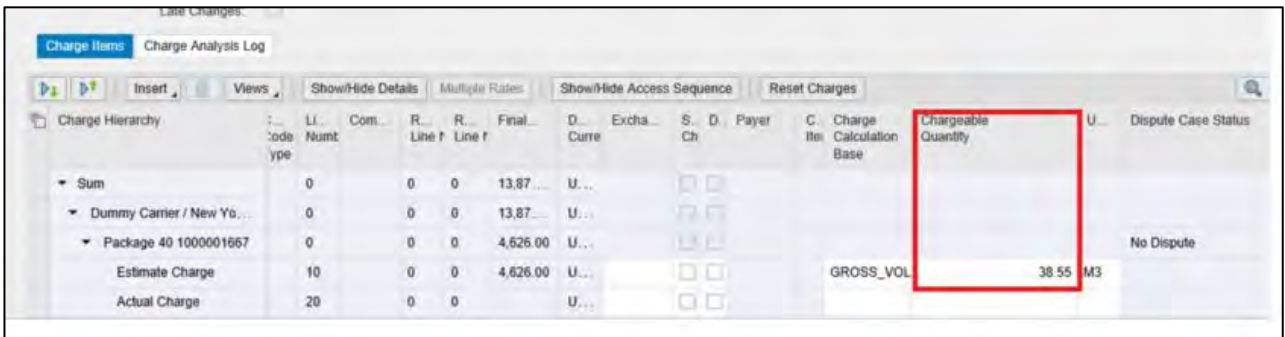


To enter estimated charges per HU, click on the 'edit' button on the top left.



The rate is entered per cbm and the total calculated amount shows on the top of the document. Repeat this for additional HUs. Then press “Save”.

If there are dozens of HUs, a workaround could be to change the “chargeable quantity”. Scroll to the right to find the column with chargeable quantity.



After updating the chargeable qty to the total of the FO, press “Enter” and then “Save”.

**Edit UNOE Planned Frt Order (FF Deliv) 6100015633**

Save Cancel Edit Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting Create Service Order Schedule Set Status >>

General Data Business Partner Items Stages Utilization Subcontracting Document Flow Document References **Charges**

Invoicing Status: 01 Not Invoiced Calculation Date: 23.09.2020 21:17:36 CET  
 Charge Calc. Status: 02 Calculated Manually-Changed Calc. Date:  
 Total Amount in Local Currency: 13,878.00 USD Exchange Rate Date: 23.09.2020  
 Total Amount in Document Currency: **13,878.00** USD Manually-Changed Exchange Rate:  
 Rounded Total Amount in Document Currency: 13,878.00 USD  
 Rounded Amount Difference in Document Currency: 0.00 USD  
 Late Changes:

Charge Items Charge Analysis Log

Insert Views Show/Hide Details Multiple Rates Show/Hide Access Sequence Reset Charges

Charge Hierarchy	Calc. Status	Charge Type	Rate Amount	R. Curre	M. Ra	Ignore Calculation Rule	P. Unit	U.	Quantity	Calculation Base	Calculated Amount
Sum											
Dummy Carrier / New York											
Package 40 100001667											
Estimate Charge	■	ESTIMATE CHARGE	120.00	USD		<input checked="" type="checkbox"/>		1 M3	<b>115.65</b>	GROSS_VOLUME	<b>13,878.00</b>
Actual Charge	▲	ACTUAL CHARGE		USD		<input type="checkbox"/>		1 M3	38.55	GROSS_VOLUME	
Custom Clearance Charge	▲	CUST. CLEA. CHG		USD		<input type="checkbox"/>					

The total amount was adjusted. Enter the charges for other FOs that belong to the same shipment.

## SOW Generation & Download

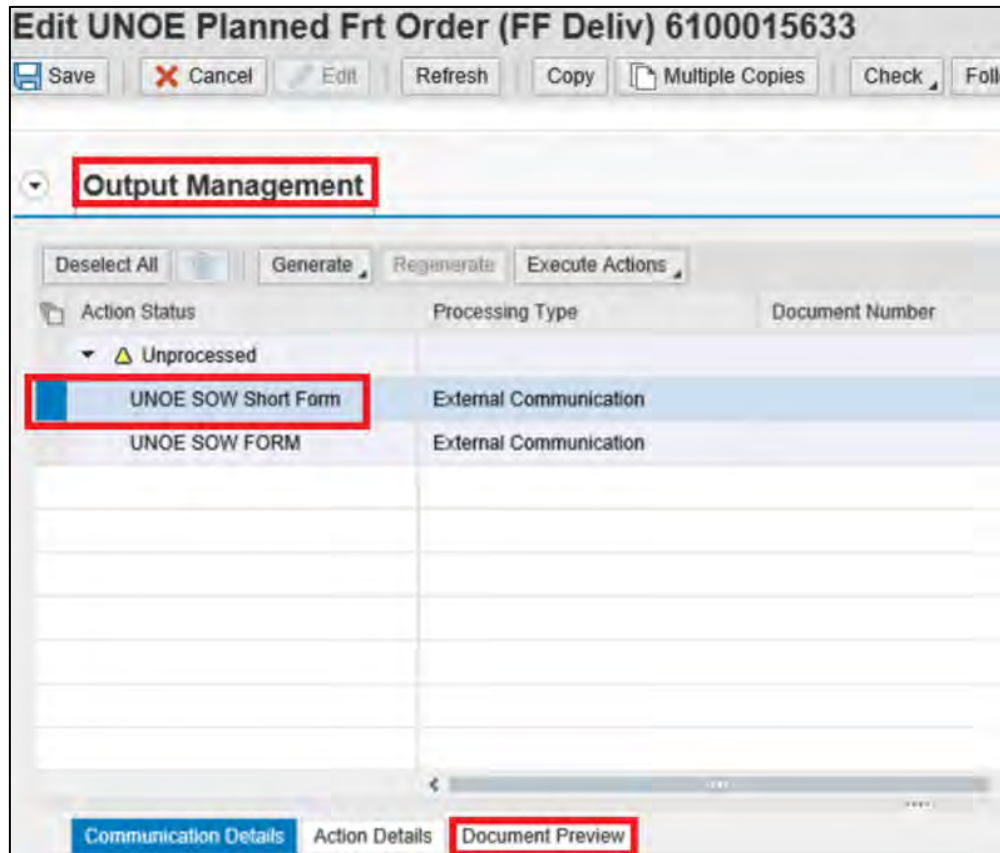
The SOW form is displayed on the FO 'Output Management' tab. If the 'Output Management' tab



is not visible go through the icon on the right. After clicking the icon all available tabs are displayed, then choose 'Output Management'. SOWs are only generated for shipments where the UN is responsible for planning. In case that parts of the shipment are transported by UN owned carriers, the UN owned carrier should be assigned in TM before the SOW is downloaded. The FOs/legs where the UN owned carrier is assigned, will not be displayed on the SOW. UN carrier codes are 'C- plus plant code', example for MINUSCA: C-CF10.

Mark the 'UNOE SOW Short Form' line. Then press the 'document preview'. The SOW Short Form reflects multi-level packaging performed in ECC.

The 'UNOE SOW Form' is specifically for vehicle requirements. A new Request for Offer (RFO) document is in development.



The SOW is in pdf format and can be amended after it was downloaded. When hovering over the top of the document the 'save' and 'print' options show.



To amend the SOW, it needs to be downloaded. It is suggested to open it in Word directly for editing and not through pdf converter. Adjust the SOW to fit the specific requirements for the transport request.

The dynamic cargo table contains the transportation content as per IBD in ECC, including the packaging details. The cargo readiness date is the IBD delivery date.

Part: 1										
Goods Purchase Order: 2200102598										
Inbound Delivery: 180080269										
Freight Order: 6100015631, 6100015632, 6100015633										
<b>Origin</b>		FCA, Al Maktoum International Airport, United Arab Emirates								
<b>Destination</b>		Door UNIFIL HQ Naqoura, Lebanon								
Pack. Seq	Packaging	Item Description + material number info (if applicable)	DG and/or SH	Package ID	QTY	Dimensions L*W*H (Meters) (per unit)	Volume (M3) (per unit)	Weight (KG) (per unit)	Goods Value (USD)	Cargo Readiness Date
1	Container: Sea, 20ft, Packing Reference			1000001667	1	6.100 * 2.440 * 2.590	38.55	3200.00		29-SEP-20
		MatDesc: Earth Station: Satellite MatNo: 2100000967		1000001667	3				3,000.00	29-SEP-20
2	Container: Sea, 20ft, Packing Reference			1000001668	1	6.100 * 2.440 * 2.590	38.55	3200.00		29-SEP-20
		MatDesc: Earth Station: Satellite MatNo: 2100000967		1000001668	3				3,000.00	29-SEP-20
3	Container: Sea, 20ft, Packing Reference			1000001669	1	6.100 * 2.440 * 2.590	38.55	2900.00		29-SEP-20
		MatDesc: Earth Station: Satellite MatNo: 2100000967		1000001669	2				2,000.00	29-SEP-20
								Total Value	8,000.00	
Note/Requirement	- Add relevant notes such as: ECTN issuing, if required, will be performed by UN appointed Freight Forwarder.									

While the cargo data, consignor and delivery address are derived from ECC data, the entries for consignee and notify party are stored in TM directly. If changes are needed to those addresses, please log a ticket with the production support.

#### 4. CONSIGNEE, DELIVERY ADDRESS & NOTIFY PARTY

**Part: 1**

**CONSIGNEE**

DIRECTOR OF MISSION SUPPORT, LOG. OFFICE  
UNITED NATIONS INTEGR. OFFICE IN HAITI  
KARIBE HOTEL, JUVENAT, PETION-VILLE  
PORT AU PRINCE, HT  
TEL: (509) 22296700  
EMAIL: BINUHBINBOUNDCOORDINATION@UN.ORG BINUH-  
PROCUREMENT@UN.ORG

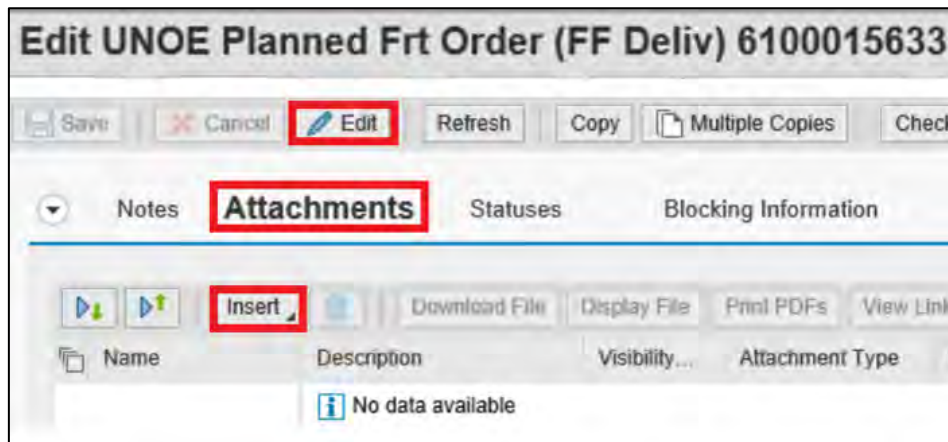
**NOTIFY PARTY**

SAME AS CONSIGNEE

After finalizing the SOW, the Freight Shopping Cart needs to be created in SRM. The SOW must be attached to the shopping cart. Please do not create Freight Shopping Carts with \$1 value but with estimated freight cost.

The final SOW also needs to be uploaded in TM. To do this, go in the Freight Order to the 'Attachments' tab. To upload the SOW or any other document to all relevant Freight Orders and/or if the document to be uploaded is stored on SharePoint, please refer to the mass upload under **Upload documents from SharePoint to TM.**

Switch to 'edit' mode. Then click on 'insert'.



Choose 'file' to upload the SOW.



**Insert File**

\* Attachment Type: Attachment

\* Description: SOW

Next > Cancel

Enter a description for your file and click 'next'.

**Insert File**

Attachment Type: Attachment

Description: SOW

\* Content:  Browse...

OK Cancel

Browse for your file and then click ok.

Name	Description	Visibility Type	Attachment Type	URL	Com Size
	SOW	Internal	Attachment		82.7

The attachment will show on the attachment tab. Press 'Save' on the upper left. As default the attachment will show as internal, this means the freight forwarder cannot see the attachment. Attachments that should be seen by external parties, would need to be switched to 'external' for the visibility type.

PD/procurement/responsible colleagues need to be informed about the requirements. After the bidding process was finalized, PD/procurement/responsible colleagues are required to update the TM Freight Order with the awarded carrier, SRM Freight PO number, date and location/route

correction (if applicable). PD/procurement/responsible colleagues will also update the actual cost for this move for each FO. The carrier is shown on the 'General Data' tab and the SRM Freight PO on the 'Document References' tab.

## Chapter 5. STO Detailed process & integration with ECC

To plan and track shipments for stock transfers in TM, a Stock Transfer Order (STO) and outbound delivery (OBD) need to be created in ECC. The OBD is the base document for the transport requirement in TM.

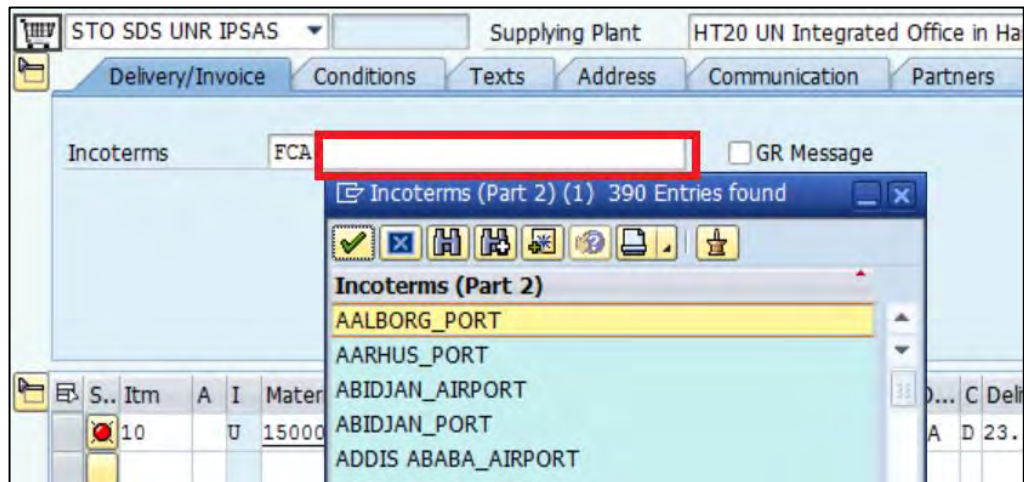
### ECC STR/STO

All different STO types are TM relevant. These are for

- Inter mission movements: ZSDS, ZBUD, ZNBD
- Intra mission movements: ZINT

An STR needs to be created first for inter-mission movements and then converted into a STO. For Intra-mission movements a STO can be created right away.

For the STO process the Incoterms EXW, DAP, and FCA were set up. For DAP and EXW the Incoterm location is free text. For FCA Incoterm orders, which covers all TM shipments that change transportation responsibility at a Handover location (HOL) along the route, the Incoterm location must be chosen from a dropdown menu.

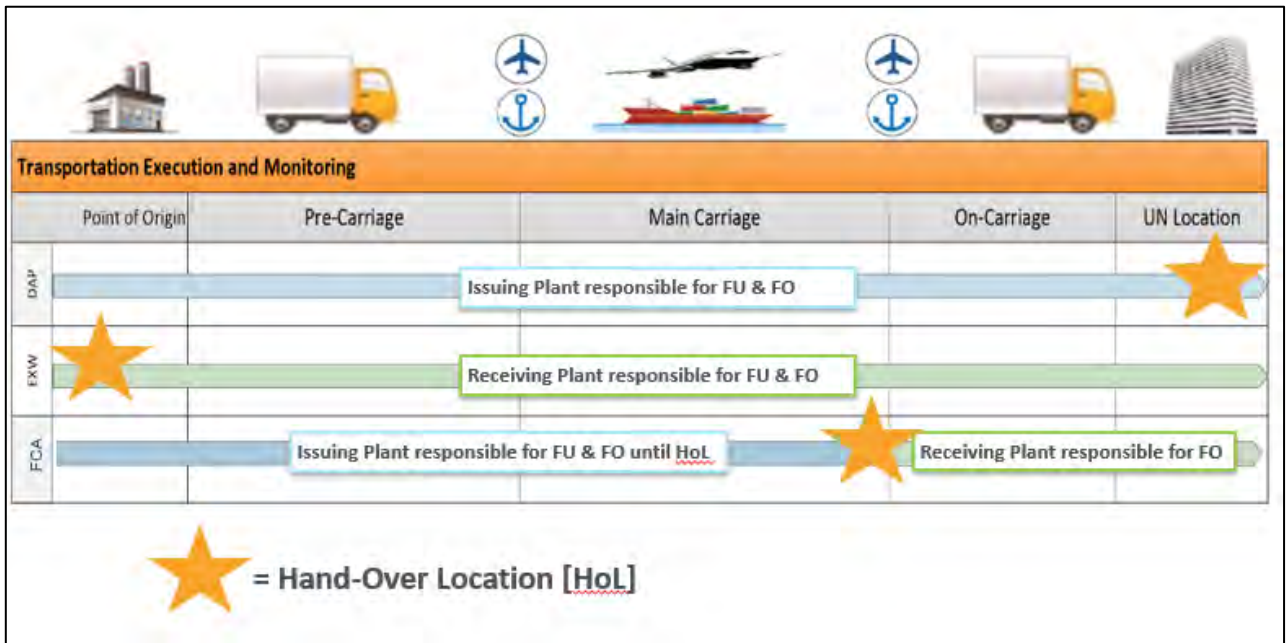


This HOL cannot be free text as it is directly connected to the TM transportation network. The HOL as a location in TM must exist as well as lanes from/to this location to other locations, otherwise the TM cockpit cannot propose routes for the shipment.

For DAP Incoterm STOs, the supplying plant is responsible to plan and execute the transport.

For EXW Incoterm STOs, the receiving plant is responsible to plan and execute the transport.

For FCA Incoterm STOs, the supplying plant is responsible to plan the whole transport. After planning is done the supplying plant manages/executes and monitors the transport up to the HOL. From HOL to final destination the receiving manages/executes and monitors the transport.



UNGSC -Global Supply Chain Coordinators - determines the origin of the transport in the STO and the delivery address of the STO based on the sending Storage Location determines the delivery location in TM. Also, the GSCC will update the purchasing group accordingly based on the incoterms and planning responsibilities.

The purchasing group, the plant and the Incoterm of the STO are relevant to determine the transportation planning and freight buyer responsibilities in TM.

Each Delivery Date, added to each line on the STO will have an impact, on the number of Outbound Documents, DTRs and FUs, generated beyond the incoterm assigned to it.

STO SDS UNR IPSAS 4810000261 Created by N Ambagahaduwage DIAS

Document Overview On | Print Preview | Messages | Personal Setting | Save As Template | Load from Template

ZSDS STO SDS UNR IPSAS 4810000261 | Supplying Plant: IT01 Global Service Centre Brndsi | Doc. date: 26.08.2019

Incoterms: DAP Naqoura | GR Message

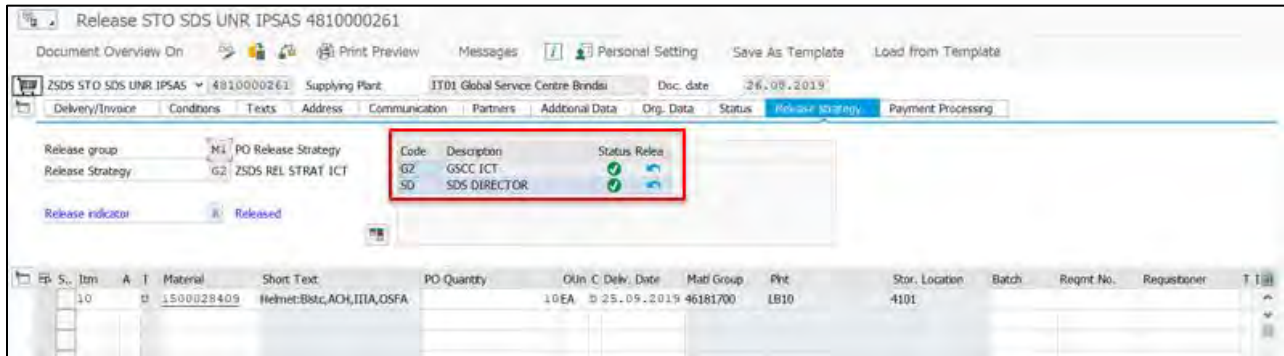
Purch. Org.: 1000 United Nations PurOr  
Purch. Group: 752 GSCC - ICT  
Company Code: 1000 United Nations

S.	Item	A	I	Material	Short Text	PO Quantity	OU	Deliv. Date	Mat Group	Pric	Stor. Location	Batch	Reqmt No.	Requester	T
10				1500028409	Helmet:Blstc,ACH,IIIA,OSFA		10EA	25.09.2019	46181700	LB10	4101				

Item: 1 [ 10 ] 1500028409, Helmet:Blstc,ACH,IIIA,OSFA

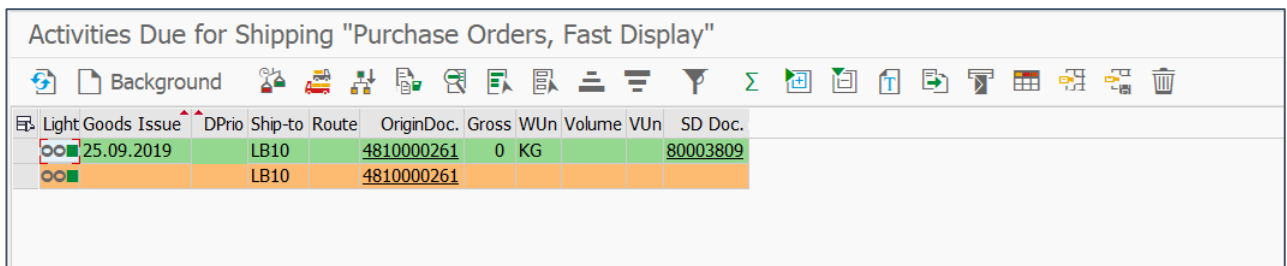
Delivery Address: UN Interim Force in Lebanon  
Street/House number: Main Street  
District:  
Postal Code/City: 1601 Naqoura  
Country: LB Lebanon | Region: JA Liban-Suf | Address: 2791620

The STO must be released in ECC before the outbound delivery can be created.



### ECC Outbound Deliveries (OBD)

After the STO is released, the Outbound Delivery (OBD) can be created. The OBD should have >0 delivery quantity to show open transport requirements in TM.



The OBD should be packed according to how the materials/equipment etc will be shipped. The packaging information will show on the Statement of Work (SOW) in TM; therefore, it is important that the correct packaging (HUs) is reflected in ECC.

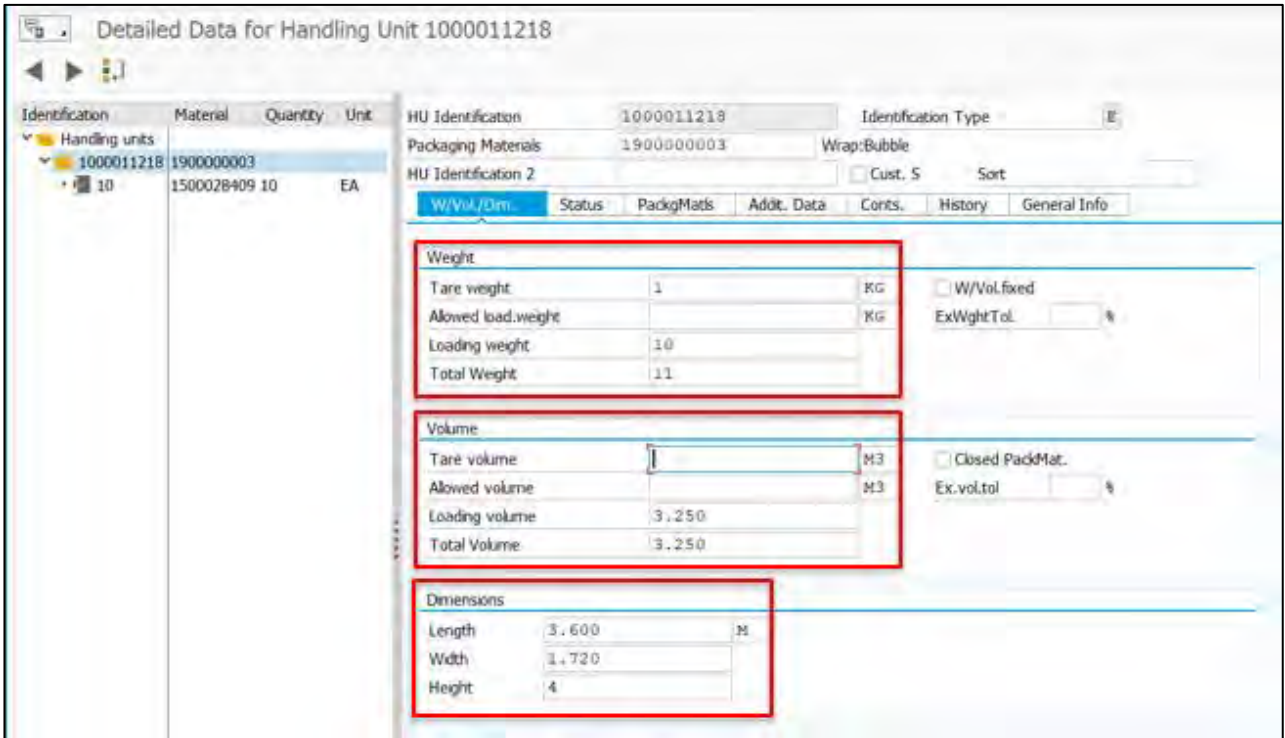
To pack the OBD click in “edit” on the pack button. For detailed packaging instruction please refer to the job aid for packing inbound deliveries:

[https://ilearn.umoja.un.org/content/courses/IP-LE-06/Job\\_Aid\\_SCM-MT\\_%20Perform\\_Packing\\_on\\_Inbound\\_Delivery.pdf](https://ilearn.umoja.un.org/content/courses/IP-LE-06/Job_Aid_SCM-MT_%20Perform_Packing_on_Inbound_Delivery.pdf)

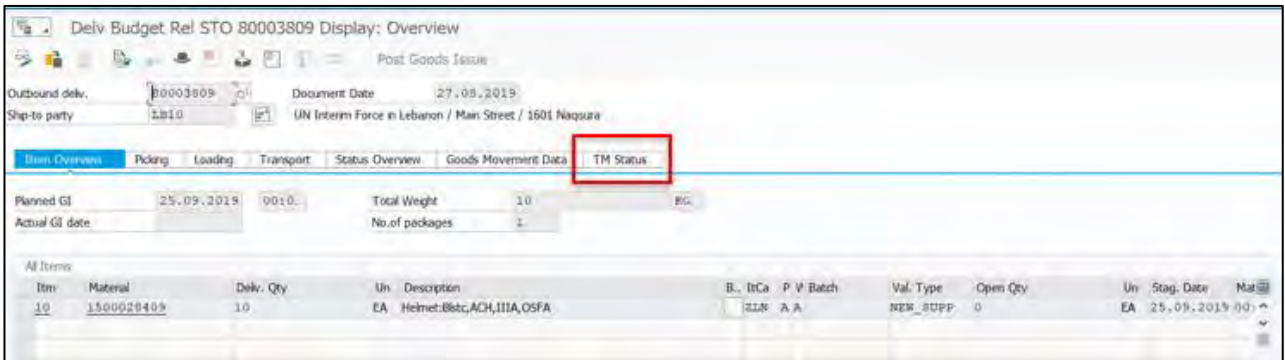


It is important that weight, volume, and dimensions including their Unit of Measures (UoM) are entered per HU. For standard packages such as containers and boxes the tare weight, volume, and dimensions should be prefilled from the material master. Please verify complete entries for above data including the UoM and if data are missing, please fill accordingly before saving.

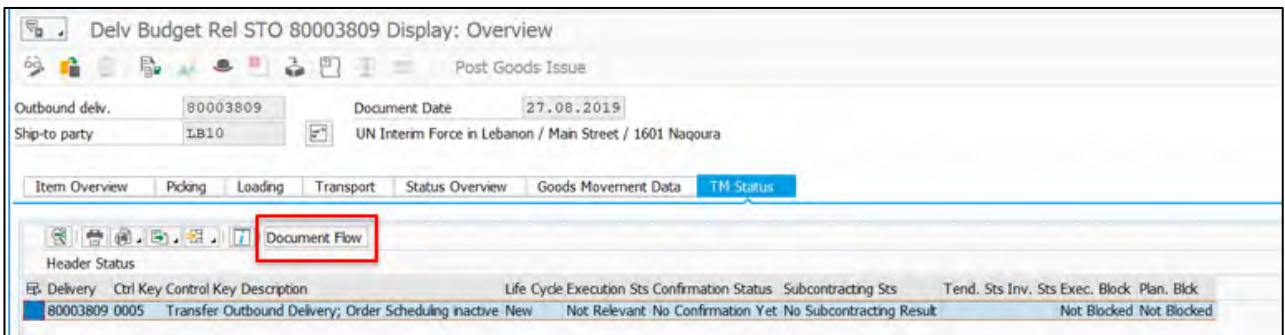
If UoM is missing in the HU, the OBD might get stuck in the queue between ECC and TM.



A "TM Status" tab is displayed on the OBD in ECC.



Clicking on the "Document Flow" shows the document numbers created in TM.



As soon as the OBD was saved, a Delivery-Based Transportation Requirement (DTR) and Freight Unit (FU) are created automatically in TM.

TM Document Flow for Delivery 80003809

Delivery: 80003809

Life Cycle Status: New  
 Execution Status: Not Relevant  
 Confirmation Status: No Confirmation Yet  
 Subcontracting Sta: No Subcontracting Result

Tendering Status: \_\_\_\_\_  
 Invoicing Status: \_\_\_\_\_  
 Execution Block: Not Blocked  
 Picking Block: Not Blocked

ERP-TR Document Flow	ERP Doc	ERP Item	Schl Line	Quantity	Unit	Status	BTD ID	BTD Descr.	BTD Cat.	BTD Cat.	Delivery	BTD Item	Item Cat.	Item
Outbound Delivery	80003809						80003809	Outbound Delivery 80003809						
Delivery Based Transportation Requirement	80003809						1100001045	DTR for STO 1100001045 (Outbound Delivery 80003809)	02	Delivery-Based Transportation Requirement 80003809				
Outbound Delivery Item	80003809	10		10	EA		1100001045	DTR for STO 1100001045 (Outbound Delivery 80003809)	02	Product	10	PRD	Produ	
Package	80003809	10					1100001045	DTR for STO 1100001045 (Outbound Delivery 80003809)	03	Package	10739	PKG	Packu	
Freight Unit	80003809	10					4100003568	STO Planned Frt Unit 4100003568	FU	Freight Unit			Freigh	

**DTR : Representation of the Delivery in TM**

**Freight Unit : Document used to Plan the Transportation**

The status of the documents can also be checked in ECC. Please note that the execution of the shipment is only tracked on the Freight Orders (FO). When the shipment is finalized the Lifecycle status will show “completed”.

Flow	ERP Doc	ERP Item	Schl Line	Quantity	Unit	Status	BTD ID	BTD Descr.
Delivery	180080269						180080269	Inbound Delivery 180080269
Delivery Based Transportation Requirement	180080269						1100000835	DTR for UNOE 1100000835 (Inbound Delivery 180080269)
Outbound Delivery Item	180080269	10		3	EA		1100000835	DTR for UNOE 1100000835 (Inbound Delivery 180080269)
Package	180080269	10					1100000835	DTR for UNOE 1100000835 (Inbound Delivery 180080269)
Freight Unit	180080269	10					4100004023	UNOE Planned Frt Unit 4100004023
Freight Order	180080269	10					6100015628	UNOE Vendor Delivered Frt Order 6100015628
Freight Order	180080269	10					6100015629	UNOE Vendor Delivered Frt Order 6100015629
Freight Order	180080269	10					6100015630	UNOE Vendor Delivered Frt Order 6100015630

Status for Freight Order 6100015628

Status Name	Code	Status Description
LIFECYCLE	02	In Process
EXECUTION	07	Ready for Transportation Execution
CONFIRMATION	01	No Confirmation Yet
SUBCONTRACTING	03	Carrier Assigned
BLK_EXEC	02	Not Blocked
BLK_PLAN	02	Not Blocked

Each TM document can be accessed from ECC by clicking on the hyperlink. Login data and role assignment for the TM system need to exist.

ERP-TM Document Flow	ERP Doc	ERP Item	Schl Line	Quantity	Unit	Status	BTD ID	BTD Descr.
Inbound Delivery	180080269						180080269	Inbound Delivery 180080269
Delivery-Based Transportation Requirement	180080269						1100000835	DTR for UNOE 1100000835
Inbound Delivery Item	180080269	10		3 EA			1100000835	DTR for UNOE 1100000835
Package	180080269	10					1100000835	DTR for UNOE 1100000835
Freight Unit	180080269	10					4100004023	UNOE Planned Frt Unit 4100
Freight Order	180080269	10					6100015628	UNOE Vendor Delivered Frt
Freight Order	180080269	10					6100015629	UNOE Vendor Delivered Frt
Freight Order	180080269	10					6100015630	UNOE Vendor Delivered Frt
Freight Order	180080269	10					6100015631	UNOE Planned Frt Order (FF
Freight Order	180080269	10					6100015632	UNOE Planned Frt Order (FF
Freight Order	180080269	10					6100015633	UNOE Planned Frt Order (FF

The link might need to be copied and pasted into a new browser window where the TM system is already open.

## Delivery Based Transportation Requirement (DTR) in TM

The Delivery Based Transportation Requirement (DTR) is based on the OBD data from ECC and reflects the shipment requirement. There is a 1:1 relationship between DTR and OBD.

The “General Data” tab shows among other data a summary of volume/weight, Incoterm & location, and the Sales Group, which reflects the responsibility for this shipment requirement.

**Display DTR for STO 1100001334 (Outbound Delivery 80004855)**

Cancel Edit Follow Up

**General Data** Business Partner Locations and Dates/Times Document Flow Notes Blocking Information Administrative Data

---

**Delivery Details**

Document Type: ZD02  
Original Delivery: Outbound Delivery  
Delivery Type: ZZNL  
Service Lvl - Sales: Standard

**Shipping**

Delivery Priority:  
Transportation Mode:

**Statuses**

Life Cycle Status: Planned  
Execution Status: Execution Not Started  
Planning Status: Planned

Delivery Blocked: ● Not Blocked  
Shipment Planning Blocked: ● Not Blocked  
Planning Block: ● Not Blocked  
Execution Block: ● Not Blocked

---

**Quantities**

Gross Volume: 0.31 M3  
Gross Weight: 21 KG  
Net Weight: 20 KG

**Organizational Data**

Sales Organization: SO\_1000 United Nations Sales Org.  
Sales Office:  
Sales Group: SG\_T94 STO - UNITAMS

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**Statuses of Original Delivery**

Planning Status: Not Relevant  
Picking Status: Not Processed Yet  
Packing Status: Completely Processed

**Incoterms**

Incoterm: EXW Ex Works  
Incoterm Location (Free Text): BRINDISI

The “Business Partner” tab shows the shipper/sending plant and the consignee/receiving plant. The “Items” tab shows the material details to be shipped and how they are packed (HUs).



Display DTR for STO 1100001334 (Outbound Delivery 80004855)

Save Cancel Edit Follow Up

General Data **Business Partner** Locations and Dates/Times Document Flow Notes Blocking Information Administrative D

Party Role	Business Partner	Devlat... Address	Name	Street	House No	Postal C...	City	Region (Desc)	C...	Coun
Shipper	IT01		UN Logistics Base	Piazza del Vento n.1		72011	Brindisi	Brindisi	IT	Italy
Consignee	SD20		UN Integrated Transition Ass				Khartoum	Khartoum	SD	Suda

Items

Item Hierarchy	Item	Item Description	D... Product	Package ID	Delivery Quantity	Del... Quantit Unit	Gross Volume	Gross Volume UoM	Gross Weight	Gross Weight UoM
Handling Unit	1059		1900000008	1000001768	1	EA	0.31	M3	21	KG
Product	10	Computer Laptop	1500005105		2	EA			20	KG

The “Locations and Dates/Times” tab shows the source location and address, where the shipment starts and the destination location and address, where the shipment ends.

The delivery date reflects the pick-up date for EXW cases, the delivery date at final destination for DAP cases, and the delivery date at handover location for non-DAP/non-EXW cases.

Display DTR for STO 1100001334 (Outbound Delivery 80004855)

Save Cancel Edit Follow Up

General Data Business Partner **Locations and Dates/Times** Document Flow Notes Blocking Information Administrative D

Source		Destination	
Source Location:	SPITA2 UNGSC Brindisi	Destination Location:	SPSDB6 UNITAMS KHARTOUM
Pick-Up Date (From):	27.12.2020 23:00:00 CET	Delivery Date (From):	28.12.2020 00:00:00 CAT
Pick-Up Date (To):		Delivery Date (To):	
Earliest Pick-Up Date:		Earliest Delivery Date:	
Latest Pick-Up Date:		Latest Delivery Date:	
		Unloading Point:	
Address		Address	
Street/House Number:		Street/House Number:	
Postal Code/City:	72100 Brindisi	Postal Code/City:	11111 Khartoum
Region:	BR Brindisi	Region:	KH Khartoum
Country:	IT Italy	Country:	SD Sudan

Please note that DTR data cannot be changed or deleted directly in TM. Change of data or deletion will be transferred from OBD in ECC to TM.

## Freight Unit (FU) in TM

A **Freight Unit (FU)** represents a set of goods that are transported together across the entire transportation chain (*smallest unit that can be transported*). The Freight Unit (FU) has a 1:1 relationship with the DTR and is the base document for planning in TM.

The “General Data” tab displays data copied from the DTR and shows under “Organizational Data” which group/unit is responsible for transportation planning and which for freight buying.

**General Information**

Description: 80004855  
 Freight Unit Type: ZF12 STO Planned Frt Unit  
 Shipping Type:  
 Movement Type: EXW Ex Works  
 Incoterms: EXW  
 Incoterms Location: BRINDISI

**Organizational Data**

Purchasing Organization: PO\_1000 United Nations Purchasing Org.  
 Purchasing Group: PG\_FT04 FT04 - FSTO  
 Planning and Execution Organization: FE\_1000 United Nations Planning & Execution Org.  
 Org Unit Group: FE\_PT04 Planning & Execution UNITAMS

**Source** Location: SP1TAZ UNGSC Brindisi

**Destination** Location: SP5DB6 UNITAMS KHARTOUM

The “Document Flow” tab shows predecessor documents such as the ECC OBD and successor documents such as Freight Order(s) (if available).

Document Hierarchy	Business Document Ty	Business Document	Business Document Life	Created By	Created On
STO Planned Frt Unit 4100005178	STO Planned Frt Unit	4100005178	In Process	DVELAGA	18.12.2020
Predecessor Business Documents					
DTR for STO 1100001334 (Outbound Delivery 80004855)	DTR for STO	1100001334	Planned	DVELAGA	18.12.2020
Outbound Delivery 80004855	Outbound Delivery	80004855			17.12.2020
Successor Business Documents					
UNOE Planned Frt Order (FF Deliv) 6100017601	UNOE Planned Frt Ord...	6100017601	In Process	01PLSTOPT94	18.12.2020
UNOE Planned Frt Order (FF Deliv) 6100017602	UNOE Planned Frt Ord...	6100017602	In Process	01PLSTOPT94	18.12.2020
UNOE Planned Frt Order (FF Deliv) 6100017603	UNOE Planned Frt Ord...	6100017603	In Process	01PLSTOPT94	18.12.2020

The FU “Stages” tab shows only one stage before the planning for EXW and DAP shipments. Non-DAP & non-EXW shipments will have two stages, one from source to handover location (HOL) and one from HOL to final destination. After planning, the FU stages will display stages according to the route and means of transport chosen. One stage equals one freight order.

Stage Descrip...	Stage Type	Transpo... Mode	Source Location	UNL... Code (Source)	WTA Code (Source)	City (Source)	Requested Pick-up Date	Req... Pick-up Time	Reques... Pick-up Zone	Departure Date	Depar... Time	Deppi... Time Zone	Destination Location	UNL... Code (Destination)	WTA Code (Destination)	City (Destinat)
Stage 1			SP1TAZ			Brindisi	00:00:00	CFT		00:00:00	CFT		SP1BA1			Naqura, Sou

## Deletion of Freight Unit

Sometimes it is necessary to delete a FU in TM. In cases where re-planning needs to be done, besides the existing Freight Order(s), the FU needs to be deleted as otherwise the re-planning can only be done with the same routes.

The “Stages” tab shows after planning different stages and the respective Freight Order(s).

Stage Description	Planning Status (Description)	Document	Transportation Mode
Stage 1	Planned	UNOE Planned Frt Order (FF Deliv 6100017210	01 (Road)
Stage 2	Planned	UNOE Planned Frt Order (FF Deliv 6100017212	03 (Sea)
Stage 3	Planned	UNOE Planned Frt Order (FF Deliv 6100017211	01 (Road)

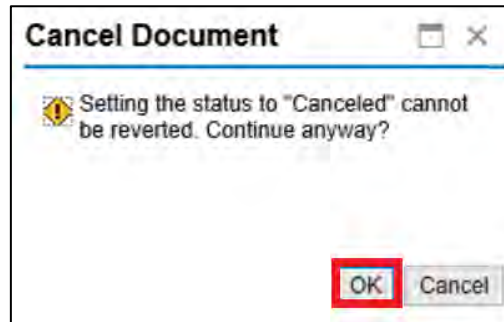
After deleting the FOs, the document field is empty on the FU “Stages” tab. To delete the FU, click “Edit” on the upper left.

Stage Description	Stage Status	Document	Transportation Mode	Source Location	Destination Location
Stage 1	Not Planned		01 (Road)	SPITA2	BRINDISI_PORT
Stage 2	Not Planned		03 (Sea)	BRINDISI_PORT	MOMBASA_PORT
Stage 3	Not Planned		01 (Road)	MOMBASA_PORT	SPCDF7

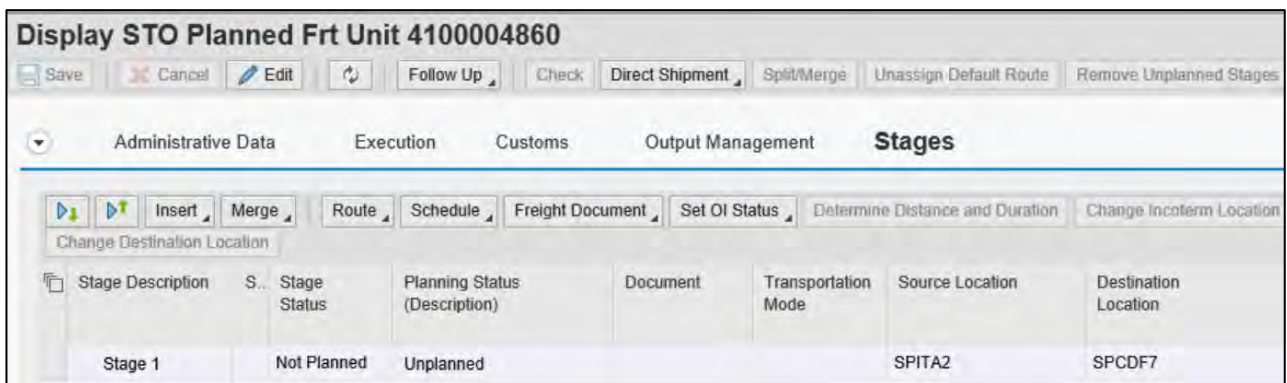
Click on the ‘arrows’  on the upper right. Choose “Cancel Document”.

Stage Description	Stage Status	Document	Transportation Mode	Source Location	Destination Location	UNL (source)	IATA Code (Source)	City (Source)
Stage 1	Not Planned		01 (Road)	SPITA2	BRINDISI_PORT			Brindisi
Stage 2	Not Planned		03 (Sea)	BRINDISI_PORT	MOMBASA_PORT			Brindisi
Stage 3	Not Planned		01 (Road)	MOMBASA_PORT	SPCDF7			Mombasa

Confirm with “OK”. The FU is now deleted. The system will generate a new FU automatically.



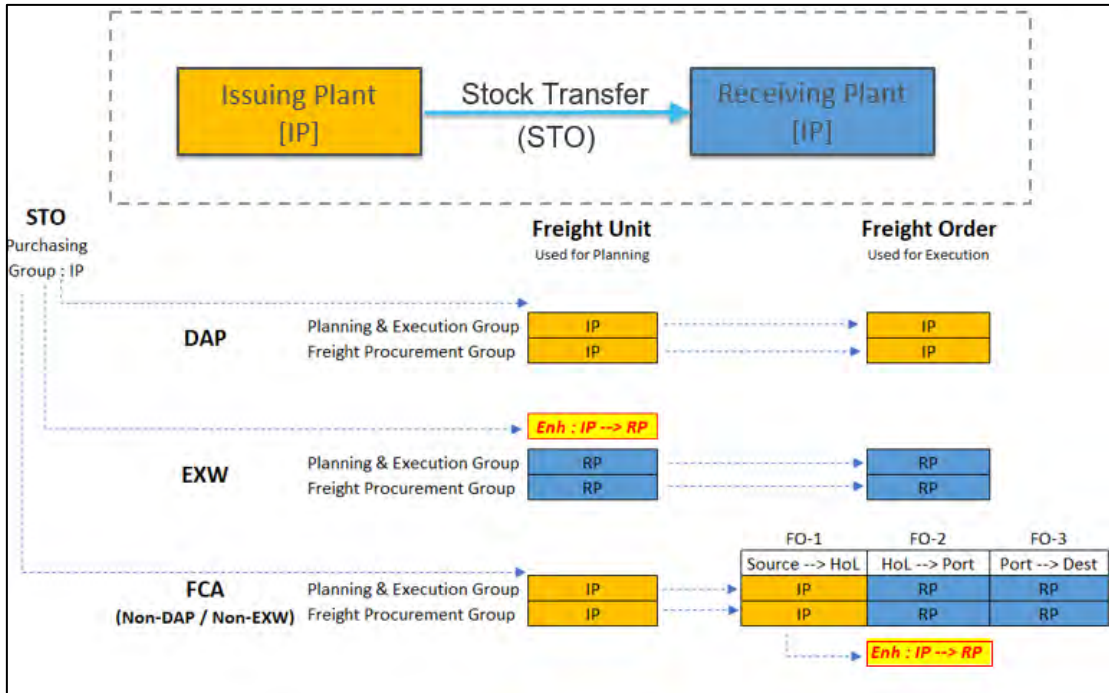
The newly created FU has only one unplanned stage for EXW and DAP shipments, for FCA shipments two unplanned stages will be shown. New planning can now be executed.



## STO Planning Profile

The Transport requirements/FUs need to be planned in TM depending on the Incoterm. For STOs there is only one planning profile. For STO there are no parts of a shipment route that are planned automatically by the system.

EXW shipments need to be planned by UN staff from the receiving entity. DAP shipments need to be planned by the sending entity as well as FCA shipments. For FCA shipments after the planning was done by the sending mission, the responsibility switches for the Freight Orders from Handover Location (HOL) to destination to the receiving entity (as per below screenshot).

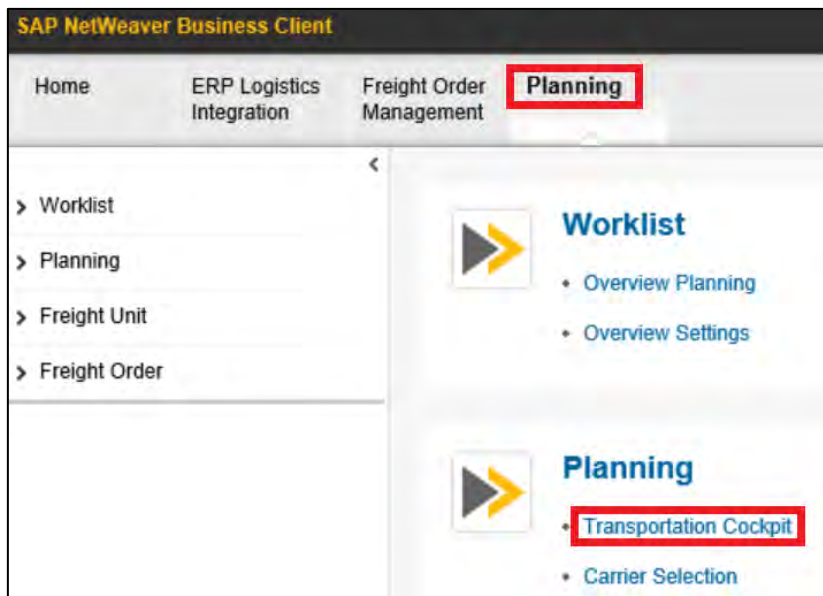


The Incoterm steers in TM if the planning is done backward or forward.

In general, for DAP shipments the Delivery Date defines the arrival at the mission or entity and the planning is done backwards from that date, for EXW the shipments are planned forward. For FCA shipments the delivery date in ECC is the date when the shipment should be at the HOL, the transportation planning is backwards from the delivery date at HOL and the planning is forward from HOL to final destination.

If the delivery date is close to the current date, the system will propose air routes.

The Transportation Cockpit used for planning, can be found under the 'Planning' section.



To execute the planning the 'planning profile' needs to be set up.

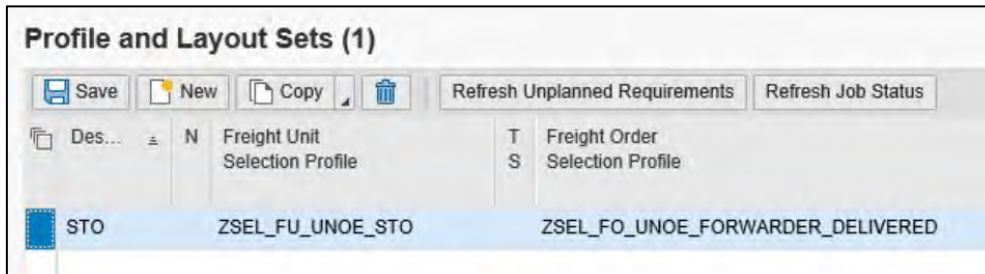
**STO** – All STO shipments are planned by UN staff through this profile. No shipment legs get automatically planned by TM.

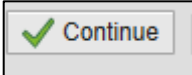


Please note: The planning profiles must be set up once by each user with the first usage of the cockpit (with values seen on screenshot) and saved.

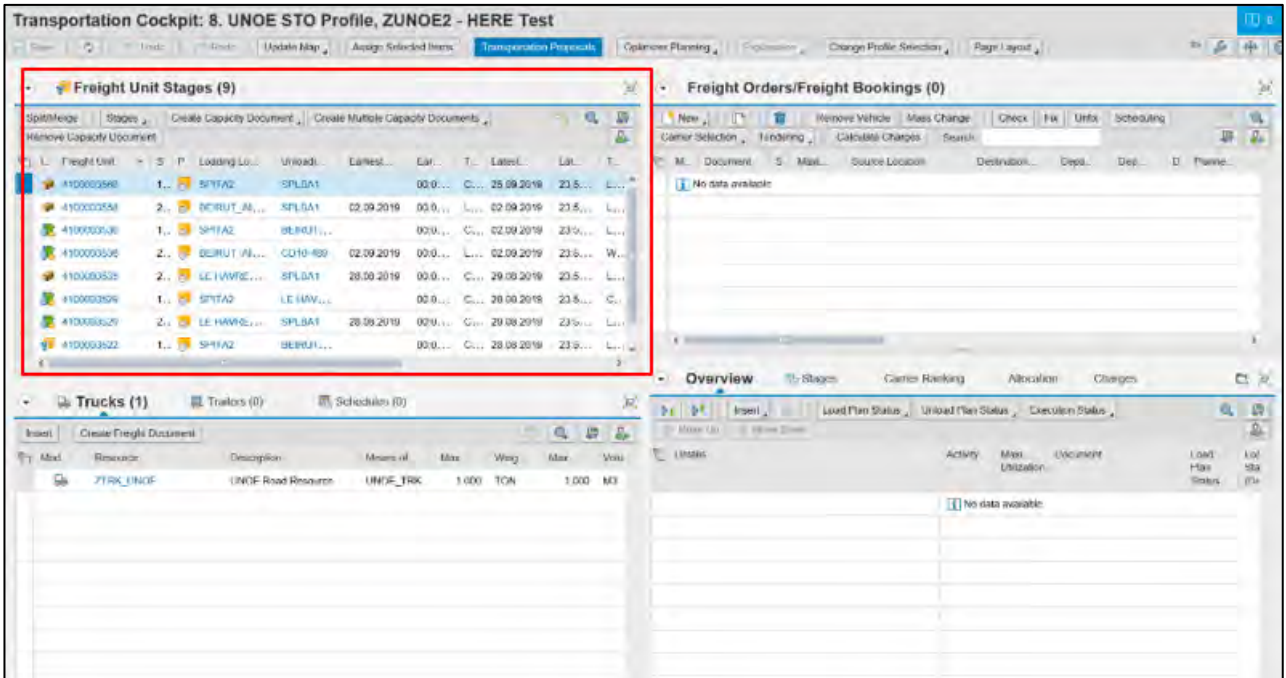
To create a new profile, press . After settings are entered press save .

After choosing the planning profile by marking the line,

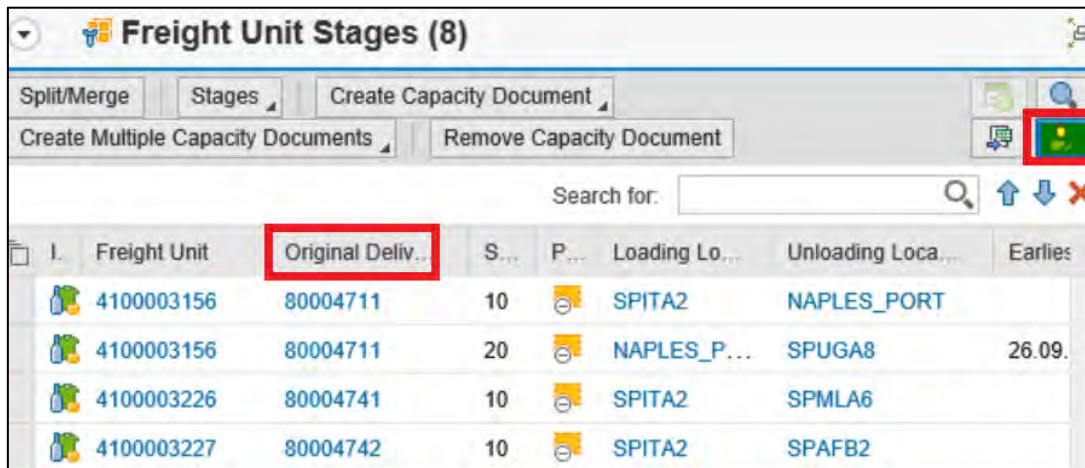



click continue  on the upper left.

All Freight Units that have not been planned yet show up on the left side of the cockpit.



Look for your Freight Unit(s) to be planned. The data that show in the cockpit can be re-arranged through drag&drop. For example, the OBD could be dragged to the left to make it easier to identify the requirement to be planned.



and/or personalized by using . Further information on personalization can be found under Personalize the Transportation Cockpit.

### Route Selection / Freight Order (FO) creation

Please check that the FU that should be planned is completely packed. The packing process happens in ECC and in TM the packaging status can be seen in the cockpit.



= Packages; the shipment has been completely packed.



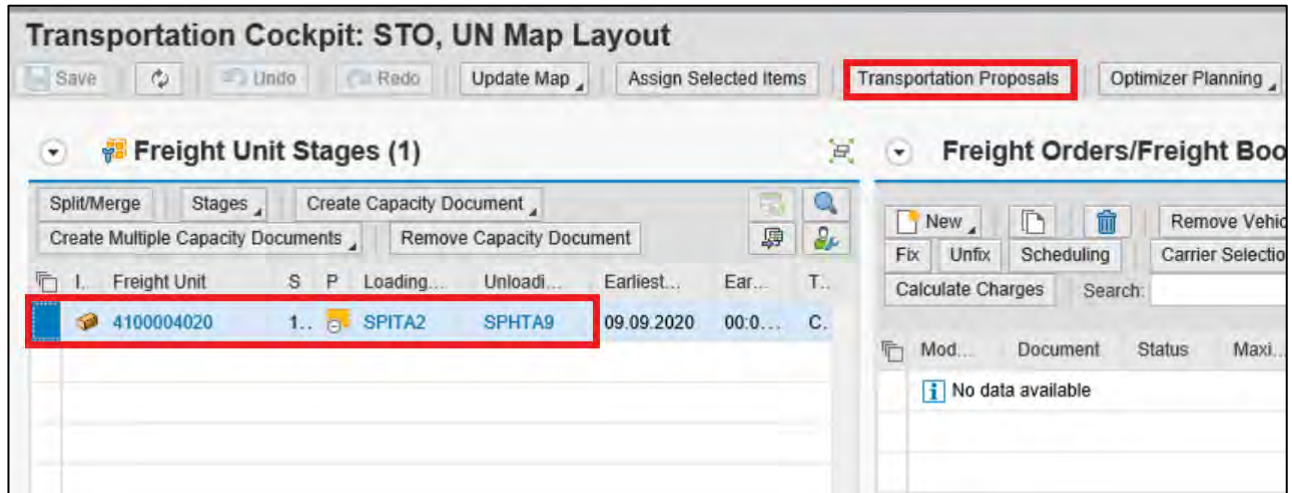
= Products; the shipment has not been packed.



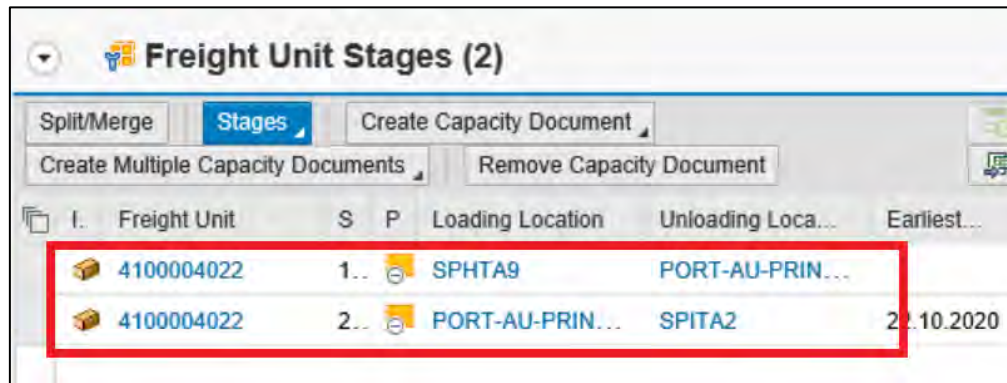
= Mixed; not fully packed.

Please plan only fully packed shipments, otherwise weight/volume/dimensions might be missing and will not show on the SOW, which would lead to incorrect transportation requirements.

Mark the line of the Freight Unit(s) that should be planned and go to 'Transportation Proposals' on the upper part of the screen.



Exception for FCA STO cases. For FCA STO cases two stages exist for the same FU. Both lines need to be selected and planned together. Through "shift" the lines can be selected together.



Please note, if you mark two or more FUs the system tries to consolidate those, hence only FUs shipping from the same origin to same destination should be marked together.

Depending on how many possible connections (lanes) are available the system gives a maximum of 20 route proposals. In case there is only one route it gets selected automatically. If an 'Optimizer Run' error occurs, it is most likely due to missing master data.

The "Means of Transport" shows which leg is transported by truck, vessel or plane. Freight Orders are proposed by means of transport and depending on the existing TM transportation network.



**Transportation Proposals: Standard Layout**

Accept Route  
  Cancel  
  Accept Planning  
 Optimizer Explanation  
 Page Layout

**Transportation Proposals**

Define Filter

Document Hierarchy	Selected	P	M	Means of Transport	Source Location	Destination Location	Loading Start...
Transportation Proposal 10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_SEA	SPITA2	SPHTA9	22.09.2020 06...
Freight Unit 4100004020	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_SEA	SPITA2	SPHTA9	22.09.2020 06...
Stage 00001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_TRK	SPITA2	GENOA_PORT	22.09.2020 06...
Stage 00002	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_SEA	GENOA_PORT	PORT-AU-PRINCE_PORT	22.09.2020 16...
Stage 00003	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_TRK	PORT-AU-PRINCE_PORT	SPHTA9	14.10.2020 21...
Transportation Proposal 11	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_SEA	SPITA2	SPHTA9	22.09.2020 06...
Freight Unit 4100004020	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_SEA	SPITA2	SPHTA9	22.09.2020 06...
Stage 00001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_TRK	SPITA2	BARI_PORT	22.09.2020 06...
Stage 00002	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_SEA	BARI_PORT	PORT-AU-PRINCE_PORT	22.09.2020 15...
Stage 00003	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_TRK	PORT-AU-PRINCE_PORT	SPHTA9	14.10.2020 22...
Transportation Proposal 12	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_SEA	SPITA2	SPHTA9	22.09.2020 06...
Freight Unit 4100004020	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_SEA	SPITA2	SPHTA9	22.09.2020 06...
Stage 00001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_TRK	SPITA2	LIVORNO_PORT	22.09.2020 06...
Stage 00002	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_SEA	LIVORNO_PORT	PORT-AU-PRINCE_PORT	22.09.2020 14...

Select the appropriate route by marking 'selected'



**Transportation Proposals: Standard Layout**

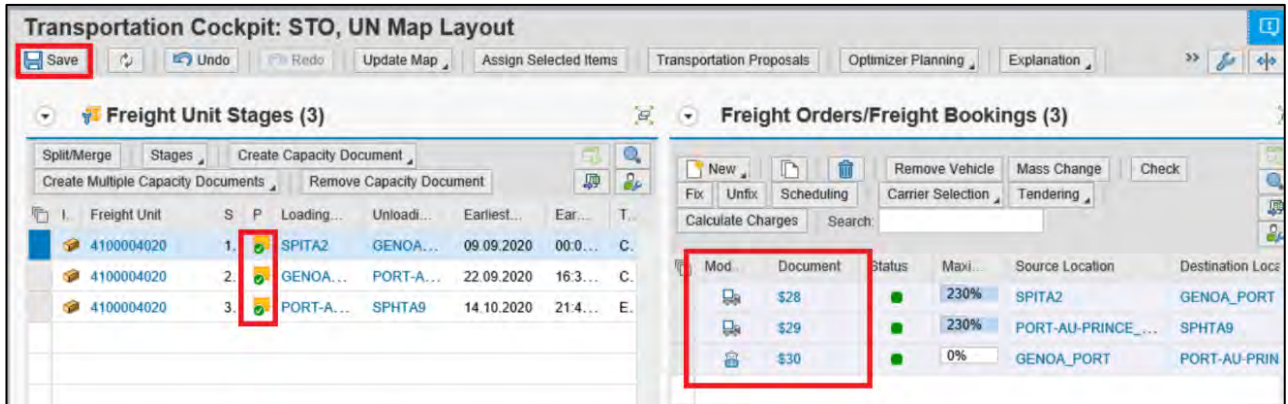
Accept Route  
  Cancel  
  Accept Planning  
 Optimizer Explanation  
 Page Layout

**Transportation Proposals**

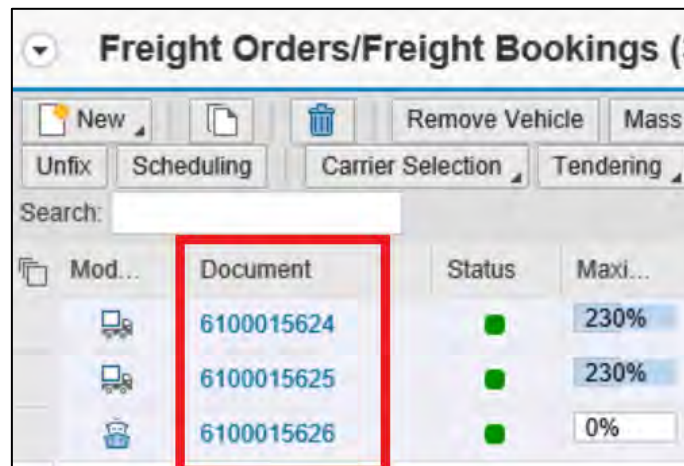
Define Filter

Document Hierarchy	Selected	P	M	Means of Transport	Source Location	Destination Location
Transportation Proposal 10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_SEA	SPITA2	SPHTA9
Freight Unit 4100004020	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_SEA	SPITA2	SPHTA9
Stage 00001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_TRK	SPITA2	GENOA_PORT
Stage 00002	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_SEA	GENOA_PORT	PORT-AU-PRINCE_PORT
Stage 00003	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UNOE_TRK	PORT-AU-PRINCE_PORT	SPHTA9

Press 'Accept Planning' and the Freight Order(s) get proposed based on the chosen route.



The FU shows now on the left with 'green check mark' which means that it is planned. The FU is also split into stages as per route selection. On the right side the Freight Order (FO) can be seen. The number shows as '\$' until save on the top left is pressed. After saving the system gives a FO number starting with '61...'



The FO is the document where among other data the estimated/actual charges and the SOW are stored. The estimated charge calculation is automatically executed when saving the FO(s). The FOs are used for event submission during the shipment.

Click on the Document '61..' number to get redirected to the FO document.

## Charge Calculation

On the FO 'Charges' tab the estimated and actual charges are shown by package/Handling Unit (HU). If an estimated rate for that route exists in the TM charges table, the rate will show automatically in the 'Rate Amount' column. In case estimated rates need to be uploaded and/or amended in the charge table, please reach out to the Master Data team. In the below case no rate is available, and therefore the rate amount is empty.

**Display UNOE Planned Frt Order (FF Deliv) 6100015626**

Save Cancel **Edit** Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting Create Service Order Schedule >>

General Data Business Partner Items Stages Utilization Subcontracting Document Flow **Charges** Execution

Invoicing Status: 01 Not Invoiced Calculation Date: 22.09.2020 21:23:08 CET  
 Charge Calc. Status: 02 Calculated Manually-Changed Calc. Date:  
 Total Amount in Local Currency: 0.00 USD Exchange Rate Date: 22.09.2020  
 Total Amount in Document Currency: 0.00 USD Manually-Changed Exchange Rate:  
 Rounded Total Amount in Document: 0.00 USD  
 Rounded Amount Difference in Document: 0.00 USD  
 Late Changes:

Charge Items Charge Analysis Log

Insert Views Show/Hide Details Multiple Rates Show/Hide Access Sequence Reset Charges

Charge Hierarchy	Late Changes	C...	Charg...	Charge...	Com...	C... Code Type	Logistica...	Rate...	R... Cur...	M. Ra An	Ignore Calculation Rule	P... Unit	U...	Q...	Calculation Base
Sum				Sum											
Dummy Carrier / New Yo...															
Package 20 1000001662															
Estimate Charge			ESTIMATE	Estimate Char				USD				1 M3	38.55		GROSS_VOL
Actual Charge			ACTUAL C	Actual Charge				USD				1 M3	38.55		GROSS_VOL
Custom Clearance C...			CUST CLI	Custom Clear				USD							

The transportation planner should enter 'estimated charges' for the movement if no rate was automatically populated or if the rate needs to be corrected. The charges need to be checked/entered for each FO of a shipment. To add charges, click on the 'edit' button on the top left.

**Edit UNOE Planned Frt Order (FF Deliv) 6100015626**

Save Cancel Edit Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting Create Service Order Schedule Set Status

General Data Business Partner Items Stages Utilization Subcontracting Document Flow **Charges** Execution Notes

Invoicing Status: 01 Not Invoiced Calculation Date: 22.09.2020 21:23:08 CET  
 Charge Calc. Status: 02 Calculated Manually-Changed Calc. Date:  
 Total Amount in Local Currency: 4.626.00 USD Exchange Rate Date: 22.09.2020  
 Total Amount in Document Currency: 4.626.00 USD Manually-Changed Exchange Rate:  
 Rounded Total Amount in Document: 4.626.00 USD  
 Rounded Amount Difference in Document: 0.00 USD  
 Late Changes:

Charge Items Charge Analysis Log


Insert Views Show/Hide Details Multiple Rates Show/Hide Access Sequence Reset Charges

Charge Hierarchy	Late Changes	A...	C...	C.. Charge Desc	C. C. L. Co Ty	Rate Amount	R... Cur...	M. Ra An	Ignore Calculation Rule	P... Un	U...	Quan ...	Calculation Base	Calculat...
Sum				Sum										
Dummy Carrier / New Yo...														
Package 20 1000001662														
Estimate Charge			ES	Estimate Charge		120.00 USD				1 M3	38.55		GROSS_VOLL	4.626.00
Actual Charge			AC	Actual Charge			USD			1 M3	38.55		GROSS_VOLL	
Custom Clearance C...			CU	Custom Clearance			USD							

The rate is entered per cbm and the total calculated amount shows on the top of the document. Save. If there is more than one HU, the amount should be estimated by HU.

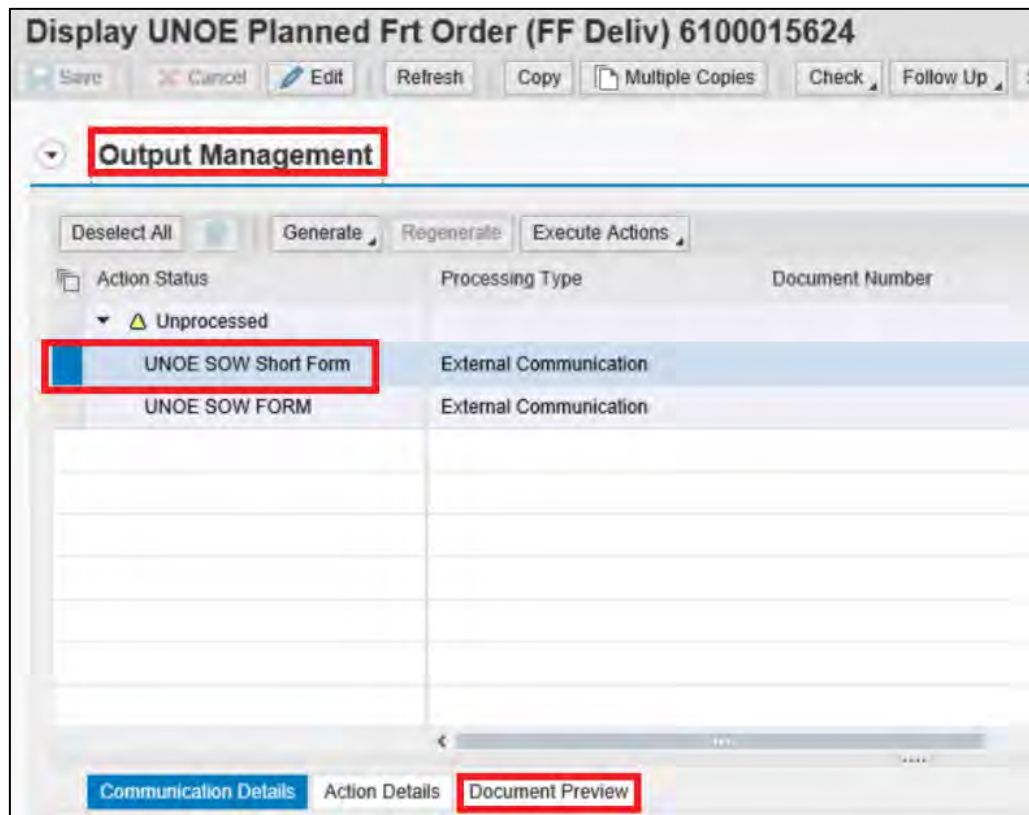
## SOW Generation & Download

The SOW form is displayed on the FO 'Output Management' tab. If the 'Output Management' tab

is not visible go through the  icon on the right. After clicking the icon all available tabs are displayed, then choose 'Output Management'. In case that parts of the shipment are transported by UN owned carriers, the UN owned carrier should be assigned in TM before the SOW is downloaded. The FOs/legs where the UN owned carrier is assigned, will not be displayed on the SOW. UN carrier codes are 'C- plus plant code', example for MINUSCA: C-CF10.

Mark the 'UNOE SOW Short Form' line. Then press the 'document preview'. The SOW Short Form reflects multi-level packaging performed in ECC.

The 'UNOE SOW Form' is specifically for vehicle requirements. A new Request for Offer (RFO) document is in development.



The SOW is in pdf format and can be amended after it was downloaded. When hovering over the top of the document the 'save' and 'print' options show.



To amend the SOW, it needs to be downloaded. It is suggested to open it in Word directly for editing and not through pdf converter. Adjust the SOW to fit the specific requirements for this transport request.

The dynamic cargo table contains the transportation content as per OBD in ECC, including the packaging details. The cargo readiness date is the OBD delivery date, except for the shipment up to HOL for FCA cases, there the cargo readiness date is based on the FO departure date, which would be earlier than the delivery date at HOL.

For STO FCA cases, there are two different SOWs. One up to the HOL and one for the shipment from HOL to final destination. The SOWs are generated on the respective FOs. Generally, the SOW can be accessed from any FO belonging to the same shipment.

Part: 1 Stock Transfer Order: 4810000135 Outbound Delivery: 80004739 Freight Order: 6100014950, 6100014951, 6100014952										
<b>Origin</b>		EXW, UNGSC Brindisi, Italy								
<b>Destination</b>		DOOR BINUH PAP Logbase 4&5, Port-au-Prince, Haiti								
Pack. Seq	Packaging	Item Description + material number info (if applicable)	DG and/or SH	Package ID	QTY	Dimensions L*W*H (Meters) (per unit)	Volume (M3) (per unit)	Weight (KG) (per unit)	Goods Value (USD)	Cargo Readiness Date
1	Container: Sea, 20ft, Packing Reference			1000001662	1	6.100 * 2.440 * 2.590	38.55	2301.00		09-SEP-20
		MatDesc: Concentrator :Oxygen Medcl MatNo: 1500000084		1000001662	1				1,011.31	09-SEP-20
								Total Value	1,011.31	
Note/Requirement	- Add relevant notes such as: ECTN issuing, if required, will be performed by UN appointed Freight Forwarder.									

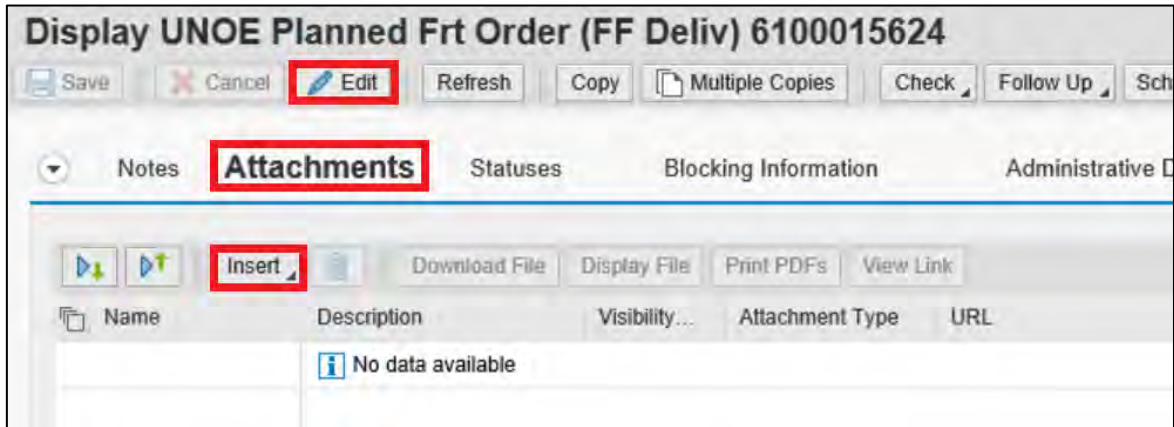
While the cargo data, consignor and delivery address are derived from ECC data, the entries for consignee and notify party are stored in TM directly. If changes are needed to those addresses, please log a ticket with the production support.

<p><b>4. CONSIGNEE, DELIVERY ADDRESS &amp; NOTIFY PARTY</b></p> <p><b>Part: 1</b> <b><u>CONSIGNEE</u></b></p> <p>DIRECTOR OF MISSION SUPPORT, LOG. OFFICE UNITED NATIONS INTEGR. OFFICE IN HAITI KARIBE HOTEL, JUVENAT, PETION-VILLE PORT AU PRINCE, HT TEL: (509) 22296700 EMAIL: BINUHINBOUNDCOORDINATION@UN.ORG BINUH-PROCUREMENT@UN.ORG</p> <p><b><u>NOTIFY PARTY</u></b> SAME AS CONSIGNEE</p>
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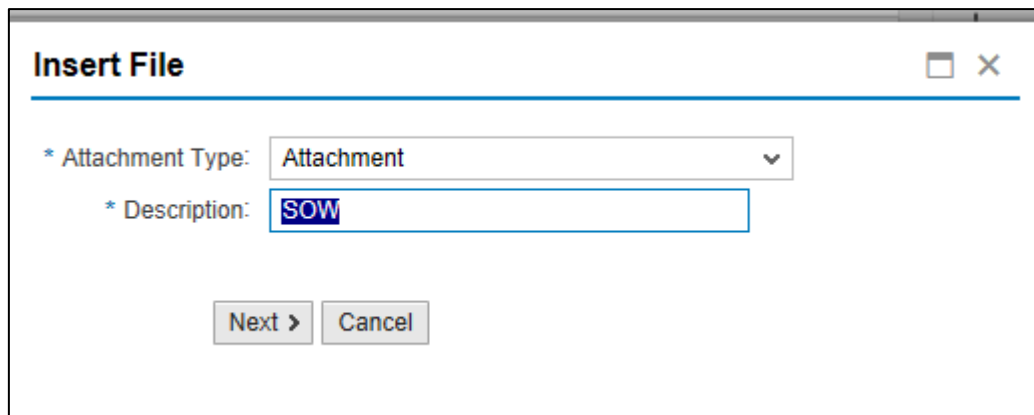
After finalizing the SOW, the Freight Shopping Cart needs to be created in SRM. The SOW must be attached to the shopping cart. Please do not create Freight Shopping Carts with \$1 value but with estimated freight cost.

The final SOW also needs to be uploaded in TM. To do this, access in the Freight Order the 'Attachments' tab. To upload the SOW or any other document to all relevant Freight Orders and/or if the document to be uploaded is stored on SharePoint, please refer to the mass upload under: [Upload documents from SharePoint to TM](#).

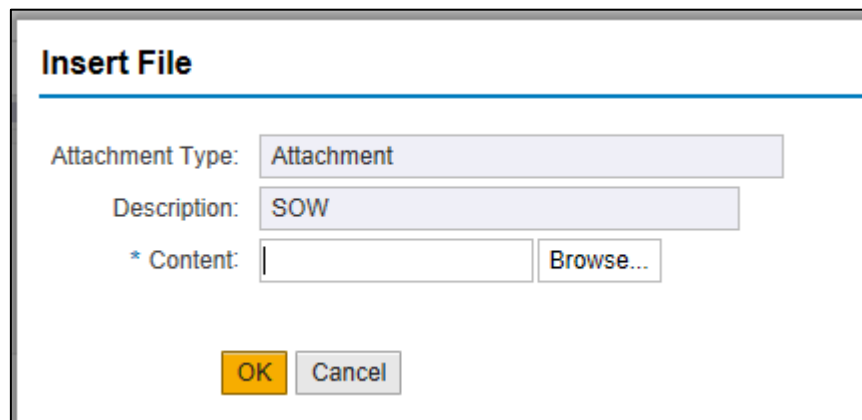
Switch to 'edit' mode. Then click on 'insert'.



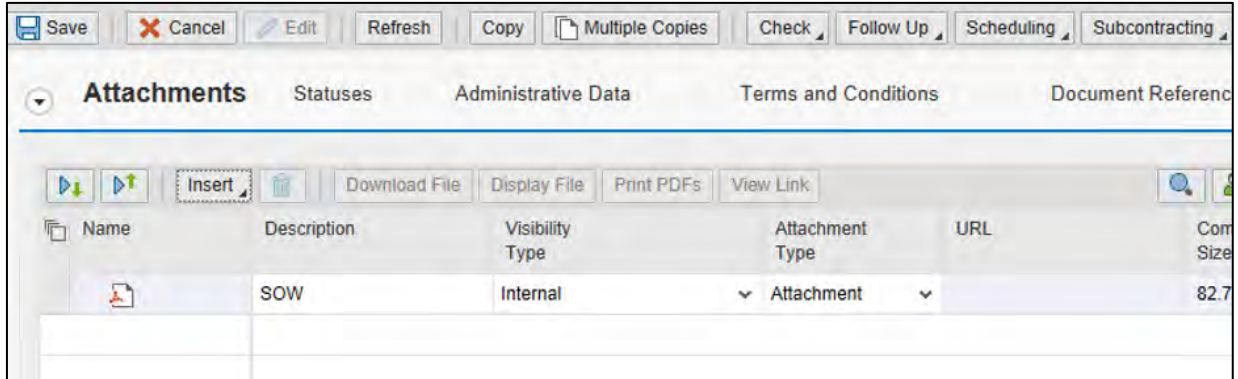
Choose 'file' to upload the SOW.



Enter a description for your file and click 'next'.



Browse for your file and then click ok.



The attachment will show on the attachment tab. Press 'Save' on the upper left. As default the attachment will show as internal, this means the freight forwarder cannot see the attachment. Attachments that should be seen by external parties, would need to be switched to 'external' for the visibility type.

PD/procurement/responsible colleagues need to be informed about the requirements. After PD/procurement/responsible colleagues have finalized the bidding process, PD/procurement/responsible colleagues are required to update the TM Freight Order(s) with the awarded carrier, Freight PO number from SRM, date and location/route correction (if applicable). PD/procurement/responsible colleagues will also update the actual cost for this move on each FO. The carrier is shown on the 'General Data' tab and the SRM Freight PO on the 'Document References' tab.



## Chapter 6. COE Detailed process

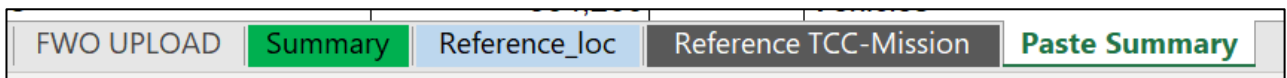
All COE shipments (LOA/non-LOA) should be captured in TM. COE shipments are created directly in TM, with no reference to SRM/ECC.

### Creation of Forwarding Order (FWO) in TM

To create a Forwarding Order in TM a final COE summary load list is needed. This load list is basis for the Excel upload file to prepare a Forwarding Order in TM. An FWO represents cargo that ships from origin to destination together.

#### Excel Upload File for Strategic Shipments

The Excel File has several tabs.



**FWO UPLOAD** - includes the Macro to create the .txt and .xlsx files. The .txt file is used for the upload in TM. No data need to be entered manually on this tab. The fields are connected through formulas to the entries in the 'Summary' tab.

Please make sure that no fields are filled with '#N/A', example:

Source Loc Desc	Source Loc
Meiss El-Jebel	#N/A
Meiss El-Jebel	#N/A
Meiss El-Jebel	#N/A
Meiss El-Jebel	#N/A
Meiss El-Jebel	#N/A

In such cases there might be a misspelling, or the chosen data does not exist. Please check your entries. For Master Data requests please refer to: [How to request Master Data for TM](#).

Below the Source Location and Destination Location are further entries (in green) to show all existing locations for the same city, in this case Meiss El Jebel (source) and Kathmandu (destination). The VLOOKUP will always show the first found location in the upload file.

Source Loc Desc	Source Loc	Dest Loc Description	Dest Loc	Pick-Up (From) Date	Delivery (To) Date	Cargo Load List Items	Product	Weight	Weight UoM	Volume	Volume UoM	Quantity
Meiss El Jebel	SPLBF4	Kathmandu	SUNP-0001	01/09/2020	25/09/2020	Cargo Load List	LoadList					
Meiss El Jebel	SPLBF4	Kathmandu	SUNP-0001	01/09/2020	25/09/2020	Total Break Bulk	BREAKBULK	34,300	KG	133	M3	18
Meiss El Jebel	SPLBF4	Kathmandu	SUNP-0001	01/09/2020	25/09/2020	Total Trailers	TRAILER	24,200	KG	221	M3	26
Meiss El Jebel	SPLBF4	Kathmandu	SUNP-0001	01/09/2020	25/09/2020	Total Vehicles	VEHICLE	364,200	KG	2,611	M3	51
Meiss El Jebel	SPLBF4	Kathmandu	SUNP-0001	01/09/2020	25/09/2020	Total Containers	CONTAINER20	0	KG	0	M3	0
Source Locations		Destination Locations										
SPLBF4		SUNP-0001										
SPLBF2		SPNPAS										
SPLBF1		SPNPA4										
SPLBE9		SPNPA3										
#NUM!		SPNPA2										
#NUM!		SPNPA1										
#NUM!		KATHMANDU_AIRPORT										
#NUM!		#NUM!										
#NUM!		#NUM!										
#NUM!		#NUM!										
#NUM!		#NUM!										
#NUM!		#NUM!										
#NUM!		#NUM!										
#NUM!		#NUM!										
#NUM!		#NUM!										

The items to be shipped from the 'Summary' tab are reflected through formulas on the 'FWO Upload'. For COE air shipments, which are planned from airport to airport, additionally inbound and positioning flights (or outbound/depositioning in case of repatriation/rotation outbound) are shown:

Source Loc Desc	Source Loc	Dest Loc Description	Dest Loc	Pick-Up (From) Date	Delivery (To) Date	Cargo Load List Items	Product	Item_Type
Vienna	VIENNA_AIRPORT	Bangui	BANGUI_AIRPORT	16/09/2020	20/09/2020	Cargo Load List	LoadList	ZLOL
Vienna	VIENNA_AIRPORT	Bangui	BANGUI_AIRPORT	16/09/2020	20/09/2020	Total Break Bulk	BREAKBULK	ZBRB
Vienna	VIENNA_AIRPORT	Bangui	BANGUI_AIRPORT	16/09/2020	20/09/2020	Total Trailers	TRAILER	ZTRL
Vienna	VIENNA_AIRPORT	Bangui	BANGUI_AIRPORT	16/09/2020	20/09/2020	Total Vehicles	VEHICLE	ZVEH
Vienna	VIENNA_AIRPORT	Bangui	BANGUI_AIRPORT	16/09/2020	20/09/2020	Total Containers	CONTAINER20	ZCON
Vienna	VIENNA_AIRPORT	Bangui	BANGUI_AIRPORT	16/09/2020	20/09/2020		INBOUND_FLIGHT	ZFLT
Vienna	VIENNA_AIRPORT	Bangui	BANGUI_AIRPORT	16/09/2020	20/09/2020		POSITIONING FLIGHT	ZFLT

After all data are entered on the 'Summary' & 'Paste Summary' (if applicable) tab, click the Macro



button: to generate the TM upload file. Save the .txt file to an easily accessible location.

**Summary** – Some data on this tab need to be entered manually by the user, those fields are marked in red on below screenshot. More data might need to be entered on this tab if the 'Paste Summary' tab is not used. Please be careful to not overwrite fields with formulas.

Example for Sea/Land shipment:

Nepal SEA repatriation (Inf Batt)			
UNIFIL			
COE SUMMARY			
Reference number	UNIFIL_NPLBAT_COE_REPAT_01092020	Pick Up date	01/09/2020
*Nepal*	NPL	Delivery date	25/09/2020
UNIT:	BAT	Incoterm	EXW
Movement Type	REPAT		
TCC:	Nepal	Date Prepared:	13/07/2018
Cargo Collection Point:	Meiss El-Jebel	Element:	Main Body
Sea/Airport of Embarkation:		Final Destination:	Kathmandu
Sea/Airport of Disembarkation:		Shipper:	UNIFIL
		Consignee	1111000114
<b>Items</b>		<b>Lane Metres</b>	
Containers	0	Containers	0
Vehicles	51	Vehicles	345
Trailers	26	Trailers	74
Break Bulk	18	Break Bulk	60
<b>Total Items</b>	<b>95</b>	<b>Total Lane Meters</b>	<b>478.77</b>

Example for Air shipment:

Senegalese Air Rotation			
MINUSCA			
COE SUMMARY			
Reference number	MINUSCA_AUTAVU_COE_ROTO_16052020	Pick Up date	16/05/2020
*Austria*	AUT	Delivery date	20/05/2020
UNIT:	AVU	Incoterm	EXW
Movement Type	ROTO		
TCC:	Austria	Date Prepared:	13/07/2018
Cargo Collection Point:	Vienna	Element:	Main Body
Sea/Airport of Embarkation:	Dakar	Final Destination:	Bangui
Sea/Airport of Disembarkation:	Bangui	Shipper:	MINUSCA
No of estimated inb. flights (no range)	1	Consignee	1111000008
<b>Items</b>		<b>Lane Metres</b>	
Containers	10	Containers	1
Vehicles	20	Vehicles	2
Trailers	3	Trailers	3
Break Bulk	6	Break Bulk	220
<b>Total Items</b>	<b>39</b>	<b>Total Lane Meters</b>	<b>226</b>

#### Fields mandatory to be filled:

- Pick Up date: DD/MM/YYYY (needs to be today or future date)
- Delivery date: DD/MM/YYYY (needs to be today or future date)
- Unit: 3-digit code of COE unit to be moved such as BAT, AVU etc.
- Incoterm: EXW for non-LOA movements, DAP for LOA movements
- Movement Type: ROTO, REPAT or DEPLOY. Used for the reference number. A different Excel macro exists for rotations to include in- and outgoing movement.
- TCC/PCC: country name. The 3-digit ISO country code is derived from this field for the reference number.
- Cargo Collection Point: Source city/Pick-up location

- Final Destination: Destination city/Delivery location
- Number of estimated inbound/outbound flights: Air shipment only, no number range allowed
- Mission Name: To be filled only if 'Paste Summary' tab is not used
- Items (Containers, Vehicles, Trailers, Break Bulk), Weight, Value, Area, and Volume: To be filled only if 'Paste Summary' tab is not used

**Other fields:**

Reference Number: Mission\_TCC/PCC&UNIT\_COE\_MovementType\_PickUpDate; Please note this string can be maximum 35 characters. Filled through formula.

Sea/Airport of Embarkation: Not reflected in TM

Sea/Airport of Disembarkation: Not reflected in TM

Date prepared: Not reflected in TM

Element: Not reflected in TM

Shipper: Automatically filled through formula

Consignee: Automatically filled through formula

**Reference\_Loc**

This tab contains all the locations that existed in TM as Master Data at the point of go-live. Later requested pick-up/destination locations, ports or airports need to be added manually to the "Reference\_Loc" tab in order to make them available for the VLOOKUP.

Ideally, upload templates for COE and Troops get updated each time a new location was created.

	A	B
1	City	Location id [20 Characters] - in UPPER CASE
2	Abu Dhabi	SUAE-00001
3	Dubai	SUAE-00002
4	Ras Al-Khaimah	SUAE-00003
5	Sharjah	SUAE-00004
6	Herat	SUAF-00001
7	Jalalabad	SUAF-00002
8	Kabul	SUAF-00003
9	Kandahar	SUAF-00004
10	Kunduz	SUAF-00005
11	Mazar-e-Sharif	SUAF-00006
12	Pul-e-Khumri	SUAF-00007
13	Durres	SUAL-00001
14	Tirana	SUAL-00002
15	Yerevan	SUAM-00001
16	Luanda	SUAO-00001
17	Buenos Aires	SUAR-00001
18	Mar Del Plata	SUAR-00002
19	Gotzendorf	SUAT-00001

There are different types of locations:

- 'SU + 2-digit country code – 5-digit number' are COE pick-up/drop-off locations (created in ECC and transferred to TM)
- 'SP + 2-digit country code - 5-digit number' are UNOE shipping points (created in ECC and transferred to TM)
- 'City\_AIRPORT' are airports created directly in TM (if more than 1 in the same city the IATA code is added such as BANGKOK\_DMK\_AIRPORT)
- 'City\_PORT' are ports created directly in TM

It is suggested to insert a row where the new location fits best. Example, Uppsala (SUSE-00012) was created as a COE location for Sweden. Insert a row (right click on left and "insert") after the last entry for SUSE-.... Please note that locations should be entered exactly as they were created in TM, location ID letters should be in upper case.

	City	Location id [20 Characters]
435	Gothenburg	SUSE-00004
436	Helsingborg	SUSE-00005
437	Karlshamn	SUSE-00006
438	Malmo	SUSE-00007
439	Skovde	SUSE-00008
440	Stockholm	SUSE-00009
441	Uddevalla	SUSE-00010
442	Vallhamn	SUSE-00011
443	Koper	SUSI-00012
444	Ljubljana	SUSI-00013
445	Bratislava	SUSK-00001

Enter the city name and TM code for the new location. Then save the file.

	City	Location id [20 Characters]
433	Gothenburg	SUSE-00004
434	Helsingborg	SUSE-00005
435	Karlshamn	SUSE-00006
436	Malmo	SUSE-00007
437	Skovde	SUSE-00008
438	Stockholm	SUSE-00009
439	Uddevalla	SUSE-00010
440	Vallhamn	SUSE-00011
441	Uppsala	SUSE-00012
442	Koper	SUSI-00012

If a COE AIR upload file needs to be updated, please insert the Airport before other location with the same city name. Example, Constanta. If the Airport is entered before the port and any other location named “Constanta”, the VLOOKUP will find the Airport first and display it on the FWO UPLOAD sheet, which would be correct for a COE AIR movement.

	City	Location id [20 Characters] - in UPPER
155	Comayagua	COMAYAGUA_AIRPORT
156	Conakry	CONAKRY_AIRPORT
157	Conakry	CONAKRY_PORT
158	Constanta	CONSTANTA_AIRPORT
159	Constanta	CONSTANTA_PORT
160	Constantine	CONSTANTINE_AIRPORT
161	Copenhagen	COPENHAGEN_AIRPORT

### Reference TCC-Mission

This tab contains the TCC/PCC country names and their Business Partner (BP) numbers as well as the 3-digit country ISO code. For the mission the names and the TM plant codes are shown. This data are used for VLOOKUPS to display the BPs and plant codes on the Upload file.

	Name	BP Number	ISO cod
7	ANDORRA	1111000185	AND
8	PALAU	1111000186	PLW
9	NAURU	1111000187	NRU
0	TUVALU	1111000188	TUV
1	TIMOR-LESTE	1111000189	TLS
2	TONGA	1111000190	TON
3	SOUTH SUDAN	1111000191	#N/A
4	KIRIBATI	1111000194	KIR
5	UNAMA	AF10	
6	UNAMA	AF10	
7	SABT	BI21	
8	MONUSCO	CD10	
9	MINUSCA	CF10	

### Paste Summary

This tab was created to protect the formulas in the 'Summary' tab. Load Lists can be pasted here to show correct Items, Weight, Value, Area, and Volume. The mission name must be filled as well.

	A	B	C	D	E
1	<b>NEPBATT - LX</b>				
2	<b>UNIFIL</b>				
3	<b>COE SUMMARY FOR REPATRIATION TO NEPAL</b>				
4					
5	<b>TCC: NEPAL</b>			<b>Date Prepared:</b>	<b>08/02/2019</b>
6	<b>Cargo Collection Point: Meiss El Jabal</b>			<b>Element: (Advance Party/Main Body)</b>	
7	<b>Seaport of Embarkation: Beirut-Rafic Hariri International A</b>			<b>Final Destination: Kathmandu,Nepal</b>	
8	<b>Seaport of Disembarkation:</b>				
9					
10					
11	<b>Items</b>			<b>Lane Metres</b>	
12	Containers	0		Containers	0
13	Vehicles	51		Vehicles	345.01
14	Trailers	26		Trailers	73.72
15	Break Bulk	18		Break Bulk	60.04
16	<b>Total Items</b>	<b>95</b>		<b>Total Lane Meters</b>	<b>478.77</b>
17					
18	<b>Weight (kg)</b>			<b>Area (M2)</b>	
19	Containers	0		Containers	0
20	Vehicles	364,200		Vehicles	833.47
21	Trailers	24,200		Trailers	131.05
22	Break Bulk	34,300		Break Bulk	71.72
23	<b>Total Weight (kg)</b>	<b>422,700</b>		<b>Total Square Meters</b>	<b>1,036.24</b>
24					
25	<b>Value (USD)</b>			<b>Volume (M3)</b>	
26	Containers	0		Containers	0
27	Vehicles	4,912,000.00		Vehicles	2,611.39
28	Trailers	175,000.00		Trailers	220.59
29	Break Bulk	753,000.00		Break Bulk	133.35
30	<b>Total Cargo Value (USD)</b>	<b>5,840,000.00</b>		<b>Total Cubic Meters</b>	<b>2,965.33</b>

### Creation of Forwarding Order (FWO) in TM (multiple pick-up/drop-off locations)

In case a movement has several pick-up or drop-off locations within the same origin or destination country, a separate Excel file needs to be used for the upload file creation. The file has several 'summary' tabs and 'paste summary' tabs.



MINUSCA			
COE SUMMARY			
Reference number	USCA_DEUFPU_COE_REPAT_30102020	Pick Up date	30/10/2020
'Germany'	DEU	Delivery date	01/12/2020
UNIT:	FPU	Incoterm	EXW
Movement Type	REPAT		
TCC:	Germany	Date Prepared:	08/05/2020
Cargo Collection Point:	Berberati	Element:	Main Body
Sea/Airport of Embarkation	0.00	Final Destination:	Bonn
Sea/Airport of Disembarkat	0.00		
<b>Items</b>		<b>Lane Metres</b>	
Containers	74	Containers	
Vehicles	0	Vehicles	
Trailers	3	Trailers	
Break Bulk	18	Break Bulk	
<b>Total Items</b>	<b>95</b>	<b>Total Lane Meters</b>	<b>0.00</b>
FWO UPLOAD		Summary (1)	Summary (2)
		Summary (3)	Reference_loc
		Reference TCC-Mission	Paste Summary(1)

Each 'Summary' tab reflects one load list. Please fill the tabs as described above with the details of the shipment to be carried out.

In case that there are less different pick-up/drop-off locations as 'summary' tabs, it is recommended to delete the not needed rows after creating the upload file. Example:

A repatriation has 2 different pick-up locations, but the Excel file used has 3 'summary' and 'paste summary' tabs.

Source Loc Desc	Source Loc	Dest Loc Description	Dest Loc	Pick-Up (From) Date	Delivery (To) Date	Cargo Load List Items	Product	Item_Type	Weight UoM	Volume	Volume UoM	Quantity	Base BTD Ref	
Berberati	SUCF-00004	Bonn	SUDE-00002	30/09/2020	01/11/2020	Cargo Load List	LoadList	ZLOL					MINUSCA_DEUISR_COE_REPAT_30092020	
Berberati	SUCF-00004	Bonn	SUDE-00002	30/09/2020	01/11/2020	Total Break Bulk	BREAKBULK	ZBRB	61,900 KG	543 M3		19	MINUSCA_DEUISR_COE_REPAT_30092020	
Berberati	SUCF-00004	Bonn	SUDE-00002	30/09/2020	01/11/2020	Total Trailers	TRAILER	ZTRL	2,850 KG	47 M3		3	MINUSCA_DEUISR_COE_REPAT_30092020	
Berberati	SUCF-00004	Bonn	SUDE-00002	30/09/2020	01/11/2020	Total Vehicles	VEHICLE	ZVEH	0 KG	0 M3		0	MINUSCA_DEUISR_COE_REPAT_30092020	
Berberati	SUCF-00004	Bonn	SUDE-00002	30/09/2020	01/11/2020	Total Containers	CONTAINERZO	ZCON	427,690 KG	2,722 M3		74	MINUSCA_DEUISR_COE_REPAT_30092020	
Birao	SUCF-00005	Bonn	SUDE-00002	30/09/2020	01/11/2020	Cargo Load List	LoadList	ZLOL					MINUSCA_DEUISR_COE_REPAT_30092020	
Birao	SUCF-00005	Bonn	SUDE-00002	30/09/2020	01/11/2020	Total Break Bulk	BREAKBULK	ZBRB	0 KG	0 M3		0	MINUSCA_DEUISR_COE_REPAT_30092020	
Birao	SUCF-00005	Bonn	SUDE-00002	30/09/2020	01/11/2020	Total Trailers	TRAILER	ZTRL	18,040 KG	159 M3		2	MINUSCA_DEUISR_COE_REPAT_30092020	
Birao	SUCF-00005	Bonn	SUDE-00002	30/09/2020	01/11/2020	Total Vehicles	VEHICLE	ZVEH	95,760 KG	431 M3		5	MINUSCA_DEUISR_COE_REPAT_30092020	
Birao	SUCF-00005	Bonn	SUDE-00002	30/09/2020	01/11/2020	Total Containers	CONTAINERZO	ZCON	0 KG	0 M3		0	MINUSCA_DEUISR_COE_REPAT_30092020	
Kinshasa	SUCD-00017	Kigali	SURW-00001	31/07/2020	01/09/2020	Cargo Load List	LoadList	ZLOL					MONUSCO_RWAFPU_COE_REPAT_31072020	
Kinshasa	SUCD-00017	Kigali	SURW-00001	31/07/2020	01/09/2020	Total Break Bulk	BREAKBULK	ZBRB	14,500 KG	69 M3		6	MONUSCO_RWAFPU_COE_REPAT_31072020	
Kinshasa	SUCD-00017	Kigali	SURW-00001	31/07/2020	01/09/2020	Total Trailers	TRAILER	ZTRL	5,600 KG	188 M3		7	MONUSCO_RWAFPU_COE_REPAT_31072020	
Kinshasa	SUCD-00017	Kigali	SURW-00001	31/07/2020	01/09/2020	Total Vehicles	VEHICLE	ZVEH	212,990 KG	1,547 M3		37	MONUSCO_RWAFPU_COE_REPAT_31072020	
Kinshasa	SUCD-00017	Kigali	SURW-00001	31/07/2020	01/09/2020	Total Containers	CONTAINERZO	ZCON	210,000 KG	804 M3		21	MONUSCO_RWAFPU_COE_REPAT_31072020	
Source Locations		Destination Locations												
SUCF-00004		SUDE-00002												
#NUM!		SPDEB9												
#NUM!		SPDEB8												
#NUM!		SPDEB7												
#NUM!		SPDEB6												
#NUM!		SPDEB5												
#NUM!		SPDEB4												
#NUM!		SPDEB3												
#NUM!		SPDEB2												
#NUM!		SPDEB1												
#NUM!		SPDEB0												
#NUM!		SPDEA9												
#NUM!		SPDEA8												
#NUM!		SPDEA7												
FWO UPLOAD		Summary (1)	Summary (2)	Summary (3)	Reference_loc	Reference TCC-Mission	Paste Summary(1)	Paste Summary ...						

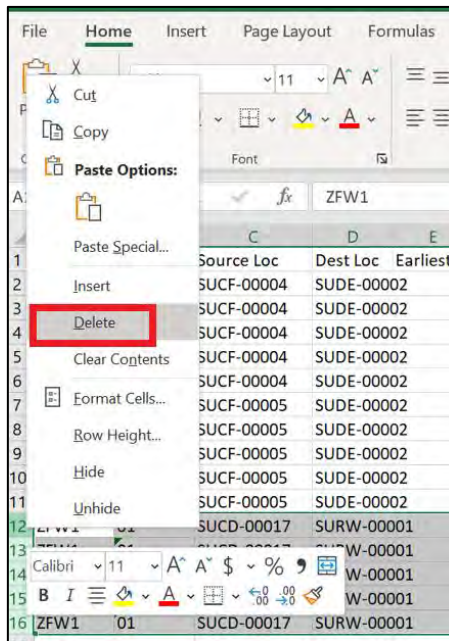
After the 2 load lists were reflected in the Excel ('paste) summary' tabs, it is recommended to not delete the 'summary (3)' tab and/or the line 12 -16 from the 'FWO Upload' from the template to not delete formulas/data needed for future uploads.



An option to delete the third load list from the upload, press the 'macro' button and then delete the not needed lines. This way the original template and formulas will not be changed.

	A	B	C	D	E	F
1	FWO Type	Service Le	Source Loc	Dest Loc	Earliest Pic	EarliestSh
2	ZFW1	01	SUCF-00004	SUDE-00002		
3	ZFW1	01	SUCF-00004	SUDE-00002		
4	ZFW1	01	SUCF-00004	SUDE-00002		
5	ZFW1	01	SUCF-00004	SUDE-00002		
6	ZFW1	01	SUCF-00004	SUDE-00002		
7	ZFW1	01	SUCF-00005	SUDE-00002		
8	ZFW1	01	SUCF-00005	SUDE-00002		
9	ZFW1	01	SUCF-00005	SUDE-00002		
10	ZFW1	01	SUCF-00005	SUDE-00002		
11	ZFW1	01	SUCF-00005	SUDE-00002		
12	ZFW1	01	SUCD-00017	SURW-00001		
13	ZFW1	01	SUCD-00017	SURW-00001		
14	ZFW1	01	SUCD-00017	SURW-00001		
15	ZFW1	01	SUCD-00017	SURW-00001		
16	ZFW1	01	SUCD-00017	SURW-00001		

Mark the lines to be deleted, then right click and choose 'Delete'.



Save the file as .txt. Continue to upload the file to TM.

### Excel Upload File for Tactical Shipments

The structure of the upload file is the same as for strategic movements, for detailed explanations please see the section Excel Upload File for Strategic Shipments of this document. There is a difference in the responsibilities for Intra/Inter mission movements and therefore in the Sales\_Group field of the upload file. To segregate the responsibilities and the subsequent roles in TM, the same org structure as for STO movements was implemented for intra/inter mission COE movements.

Formulas in the file determine the Sales\_Group based on the Incoterm and which mission is responsible for the transportation planning. EXW = receiving mission plans, DAP = sending mission plans. For intra mission movements the Incoterm is defaulted to DAP.

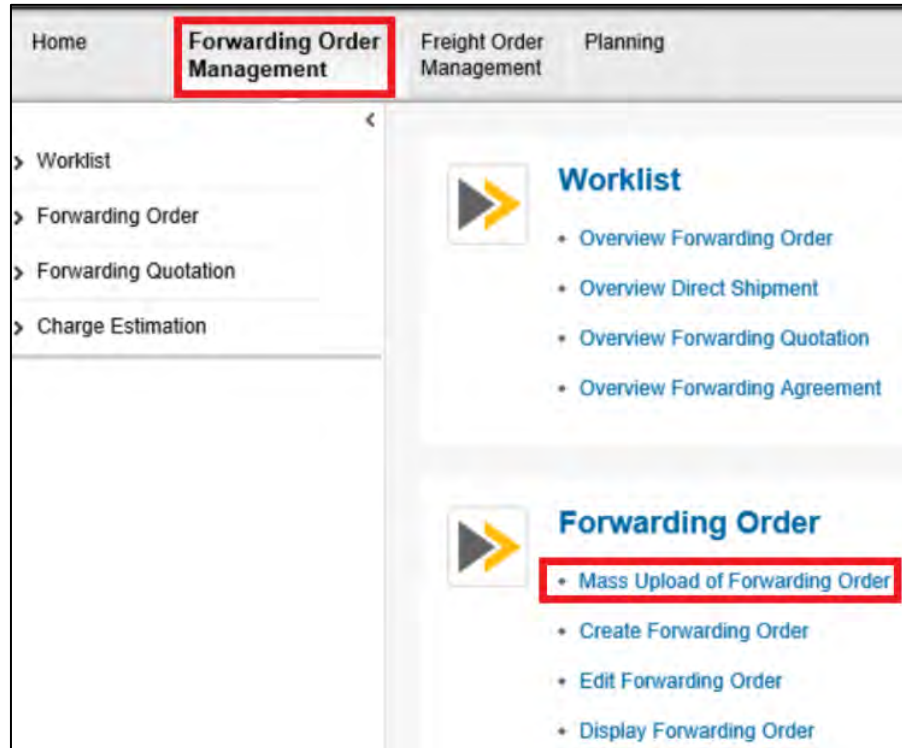
As movement type can either INTER or INTRA be chosen. The mission name in the 'Reference number' depends on the planning mission, for EXW cases, the receiving mission is displayed and for DAP cases, the sending mission is displayed.

COE INTRA/INTER MISSION			
MINUSMA			
COE SUMMARY			
Reference number	MINUSMA_NPLBAT_COE_INTER_20112020	Pick Up date	20/11/2020
"Nepal"	NPL	Delivery date	25/11/2020
UNIT:	BAT	Incoterm	DAP
Movement Type	INTER	EXW if receiving mission plans transport DAP if sending mission plans transport DAP is defaulted for INTRA mission movements	
TCC:	Nepal	Date Prepared:	13/11/2020
Cargo Collection Point:	Gao	Element:	Main Body
Sending Mission:	MINUSMA	Final Destination:	Kananga
Receiving Mission:	MONUSCO	Shipper:	ML10
		Consignee:	CD10
<b>Items</b>		<b>Lane Metres</b>	
Containers	0	Containers	not reflected in TM
Vehicles	0	Vehicles	0
Trailers	0	Trailers	0
Break Bulk	3	Break Bulk	0
<b>Total Items</b>	<b>3</b>	<b>Total Lane Meters</b>	<b>0.00</b>
<b>Weight (kg)</b>		<b>Area (M2)</b>	
Containers	0	Containers	0
Vehicles	0	Vehicles	0
Trailers	0	Trailers	0
Break Bulk	1,084	Break Bulk	4
<b>Total Weight (kg)</b>	<b>1,084.00</b>	<b>Total Square Meters</b>	<b>4.00</b>
<b>Value (USD)</b>		<b>Volume (M3)</b>	
Containers	0	Containers	0
Vehicles	0	Vehicles	0

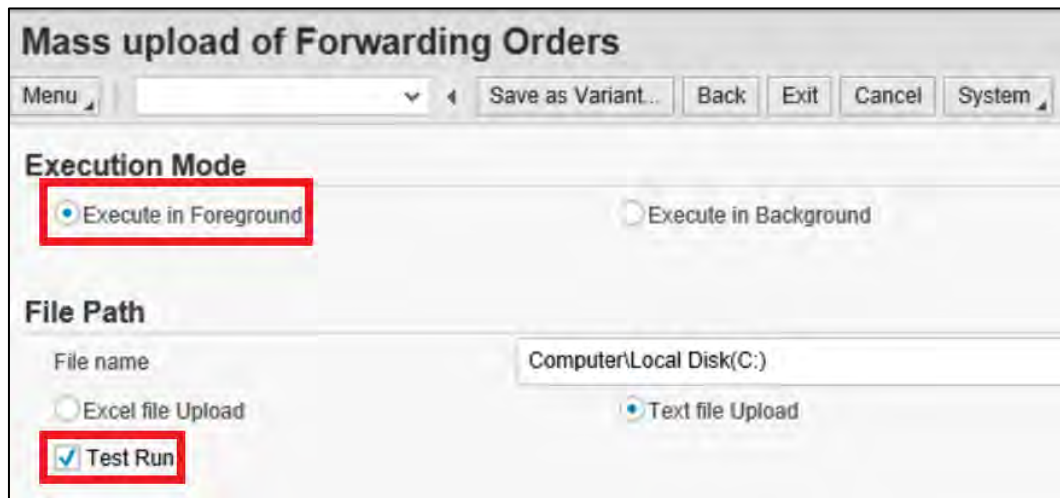
Shipper and Consignee will be filled automatically based on formulas connected to sending mission and receiving mission.


### TXT upload in TM

After logging into TM NWBC, click on "Forwarding Order Management".



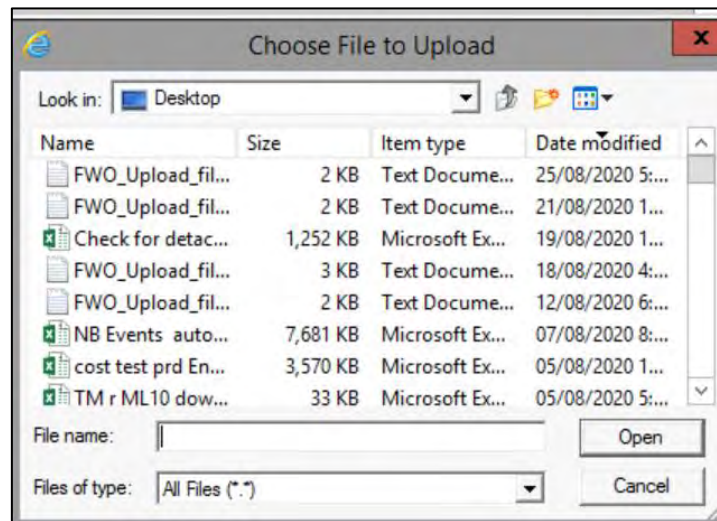
Choose 'Mass Upload of Forwarding Order'.



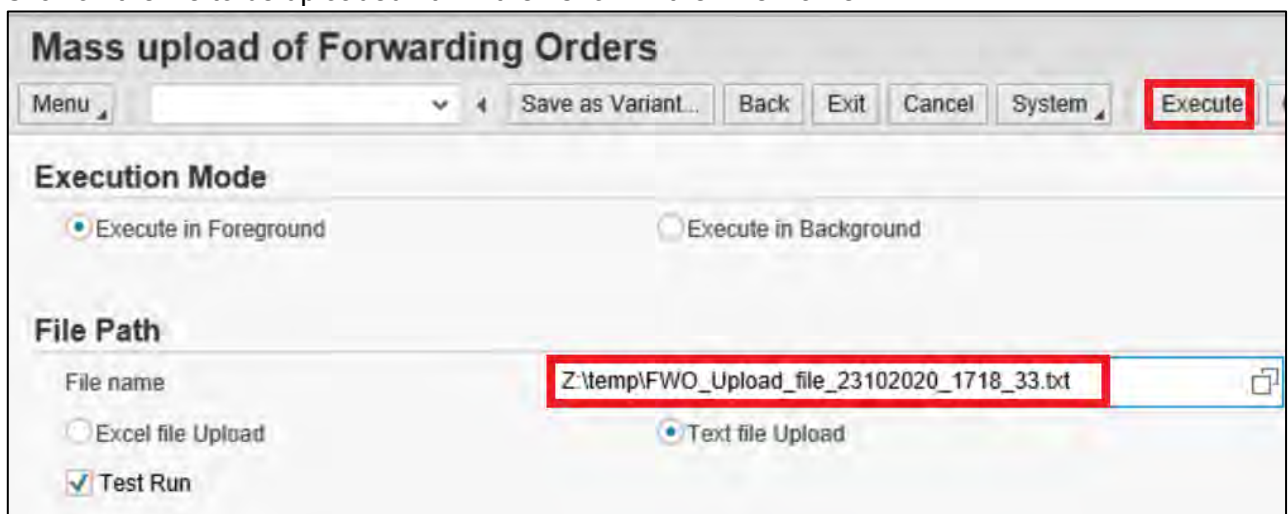
Choose 'Execute in Foreground' and mark 'Test Run'. Then Choose the .txt file to be uploaded by clicking on the squares  at the right of the 'File name' entry box.



Confirm with 'OK'.



Click on the file to be uploaded. It will then show in the 'File Name'.





Press 'Execute' on the upper right.

**Mass upload of Forwarding Orders**

Menu | [Dropdown] | [Back] [Exit] [Cancel] [System] | [Details] [Select all] [Process File] | Sort in Ascending

Message	Validation	FWO ID	Status	FWO Type	Movement T	Source Loc	Destinatio	Pick Up Da	Pick Up Ti
[i]	○○○●			ZFW1	ZDE	SUGN-00001	SUML-00003	01/11/2020	12:00:00
[i]	○○○●			ZFW1	ZDE	SUGN-00001	SUML-00003	01/11/2020	12:00:00
[i]	○○○●			ZFW1	ZDE	SUGN-00001	SUML-00003	01/11/2020	12:00:00
[i]	○○○●			ZFW1	ZDE	SUGN-00001	SUML-00003	01/11/2020	12:00:00
[i]	○○○●			ZFW1	ZDE	SUGN-00001	SUML-00003	01/11/2020	12:00:00

Check if the data are correct. All validations must show in green. If there are errors, the validation will show in red and by clicking on the message  on the left you can see what the error is. Please correct the error and reupload the file.

Go 'back'  and unmark the test run  Test Run . Execute again. Now the Forwarding order is uploaded and the FWO number in TM is given:

**Mass upload of Forwarding Orders**

Menu | [Dropdown] | [Back] [Exit] [Cancel] [System] | [Details] [Select all] [Process File] | Sort in Ascending Order | [S]

Message	Validation	FWO Number	Status	FWO Type	Movement T	Source Loc	Destinatio	Pick Up Da	Pick Up Ti	Req. Delive
[i]	○○○●	<b>1500003201</b>	○○○●	ZFW1	ZDE	SUGN-00...	SUML-00...	01/11/2020	12:00:00	25/11/2020
[i]	○○○●			ZFW1	ZDE	SUGN-00...	SUML-00...	01/11/2020	12:00:00	25/11/2020
[i]	○○○●			ZFW1	ZDE	SUGN-00...	SUML-00...	01/11/2020	12:00:00	25/11/2020
[i]	○○○●			ZFW1	ZDE	SUGN-00...	SUML-00...	01/11/2020	12:00:00	25/11/2020
[i]	○○○●			ZFW1	ZDE	SUGN-00...	SUML-00...	01/11/2020	12:00:00	25/11/2020

By clicking on the FWO number the FWO document can be accessed directly.

**Display Forwarding Order for COE 1500003201**

Save Cancel Edit Copy Other Copy Options Refresh Follow Up Check Confirm Cancel Document Customs Page

**General Data** Business Partner Locations and Dates/Times Actual Route Ordered Route Document Flow

**Forwarding Order Data**

\* Document Type: ZFW1  
 Description: Forwarding Order for COE  
 Order Date: 26.10.2020  
 Life Cycle Status: In Planning  
 House Bill of Lading:  
 House Bill of Lading Status: Not Finalized  
 Carrier's Master Bill of Lading Num...  
 Buyer's Reference Number: UNIFIL\_GNOBAT\_COE\_DEPLOY\_01112020  
 Cross-Trade Forwarding Order:  
 Import Decl. by LSP:  
 Insurance by LSP:  
 Buyer's or Shipper's Consolidation:  
 Controlled:   
 External Freight Agreement:

**Organizational Data**

Sales Organization: SO\_1000  
 Sales Office:  
 Sales Group: SG\_S02  
 Person Responsible:

**Settlement Terms**

Incoterm: EXW  
 Incoterm Location:  
 Freight Term:

**Notes**

The 'Buyer's Reference Number' is a unique code for this shipment or several shipments that should show up on the same SOW. The pick-up date is added at the end of the string. For rotation cases the string is set to be the same through a setting on the Excel Upload file.

Depending on the Incoterm the system either automatically created Freight Orders or the Transportation Planner must carry out the planning. EXW = non-LOA, planning is done by UN. DAP = LOA, TM creates Freight Orders automatically.

General Data Business Partner Locations and Dates/Times Actual Route Ordered Route **Document Flow**

Display

Document Hierarchy	Business Document Ty...	Business Document	Business Document Life...	Created By	Create
Forwarding Order for COE 1500003201	Forwarding Order for COE	1500003201	In Planning	02PLCOEP...	26.10.2
Successor Business Documents					
COE Non-LOA Frt Unit 4100004605	COE Non-LOA Frt Unit	4100004605	New	02PLCOEP...	26.10.2

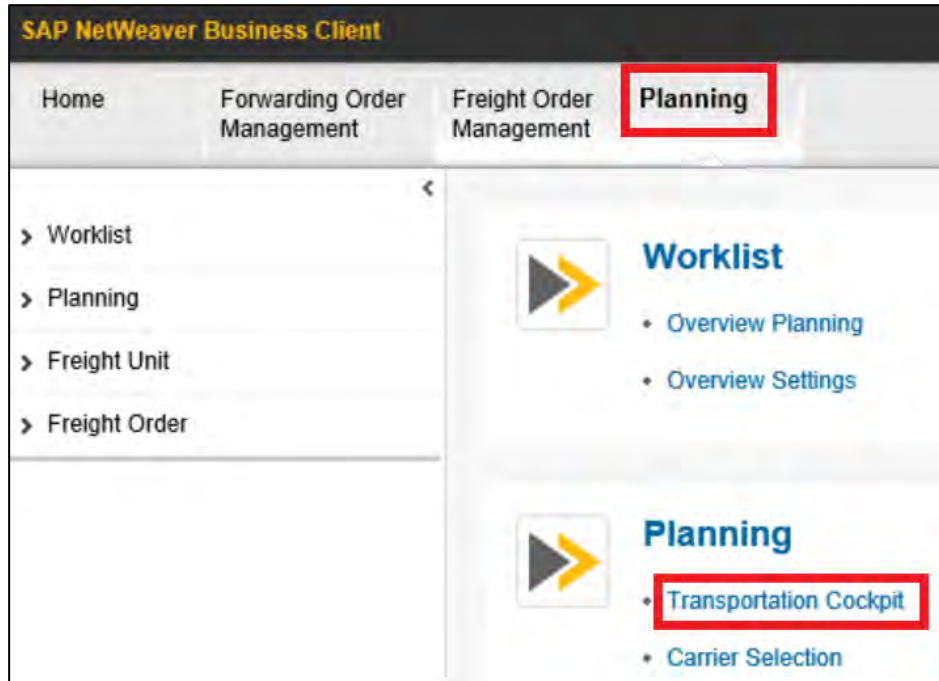
On the 'Document Flow' tab you can see which associated documents are created. The Freight Unit (FU) is created automatically for all documents and starts with '41...'. The FU is used in the transportation cockpit and represents cargo that ships from origin to destination together. As the above is an EXW example no Freight Orders (FOs) starting with '61...' have been created yet.

**Display Forwarding Order for COE 1500003201**

Save Cancel Edit Copy Other Copy Options Refresh Follow Up

Follow Up

To plan the Freight Order(s) go to 'Follow Up' at the top of the FWO document and choose 'Start Transportation Cockpit'. Alternatively, the planning cockpit can be accessed from the TM main page "Planning" section.



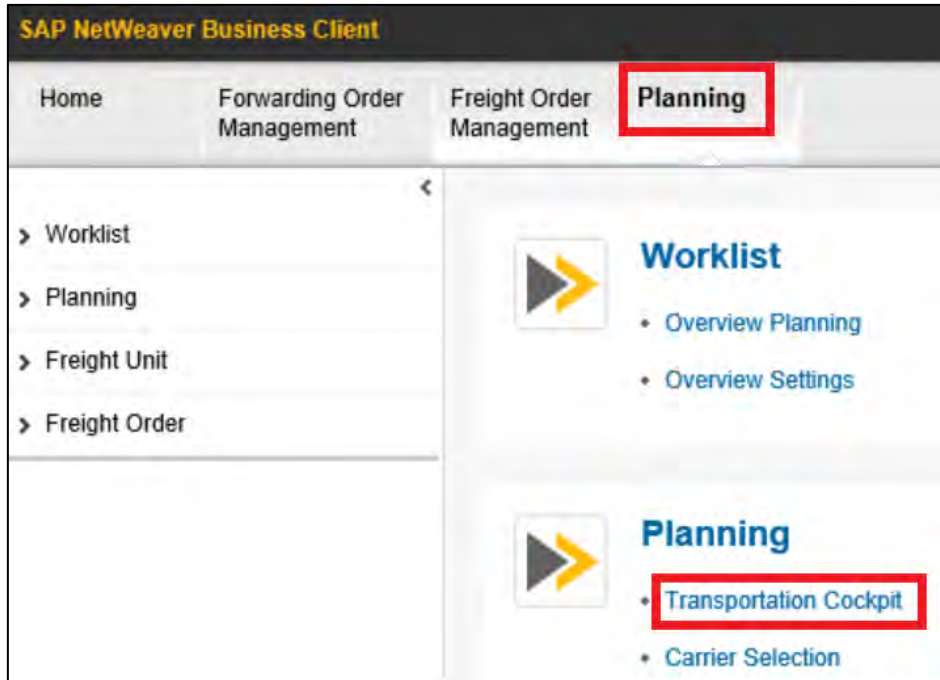
### COE Planning Profiles

The transport requirements/FUs need to be planned in TM depending on the Incoterm. For COE, DAP or LOA shipments are planned automatically by the system. EXW or non-LOA shipments need to be planned by UN staff. The Incoterm steers in TM if the planning is done backward or forward. In general, for DAP shipments the Delivery Date defines the arrival at the mission or TCC/PCC and the planning is done backwards from that date, for EXW the shipments are planned forward.

For COE shipments, both, the pick-up and delivery date are provided. If the dates are too far apart, TM might suggest routes with stop-over or there are time gaps between the FOs as the planning algorithm prevents the shipment from arriving early at the destination. If the pick-up and delivery date are too close for sea/land shipment, the system will propose air routes.

The Transportation Cockpit can be found under the 'Planning' section.





To execute the planning the 'planning profiles' need to be set up. For COE there are currently five different profiles. Depending on the roles assigned the following profiles could be set up.

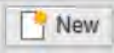
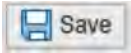
- **COE LOA** – for DAP shipments where the TCC/PCCs plan the transport and the UN tracks the shipments. The Freight Units for DAP shipments get automatically planned by TM.
- **COE non LOA** – for EXW shipments where the UN plans the transport. The transportation planner needs to choose the route for the shipment. This profile is also used for intra/inter mission movements with EXW Incoterm (receiving mission plans the transport).
- **COE non LOA non Air** – for EXW shipments where the UN plans the transport but no air routes should be shown. This profile is for Sea/Land movements only.
- **COE Intra DAP** – for DAP intra mission movements. Intra mission movements should always be created with DAP Incoterm. The transportation planner needs to choose the route for the shipment.
- **COE Inter DAP** – for DAP inter mission movements where the sending mission plans the transport. The transportation planner needs to choose the route for the shipment.



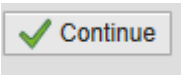
Intra/Inter mission planning profile set up:

Description	N...	Freight Unit Selection Profile	T S	Freight Order Selection Profile	F... Selt	C S	I. S	Planning Profile	Transportation Cockpit Layout
COE Inter DAP		ZSEL_FU_COE_INTER_MISSION_LOA		ZSEL_FO_COE_NONLOA				ZPLN_COE	UN Map Layout
COE Intra DAP		ZSEL_FU_COE_INTRA_MISSION_LOA		ZSEL_FO_COE_NONLOA				ZPLN_COE	UN Map Layout
Intra/Inter EXW		ZSEL_FU_COE_NON-LOA		ZSEL_FO_COE_NONLOA				ZPLN_COE	UN Map Layout

Please note: It is very important to set the planning profiles up with the correct selections for the 'Freight Unit Selection Profile', "Freight Order Selection Profile", and "Planning Profile" as otherwise the Freight Order types could be wrong, which could lead to wrong reporting. The planning profiles must be set up once by each user with the first usage of the cockpit (with values seen on screenshot) and saved.

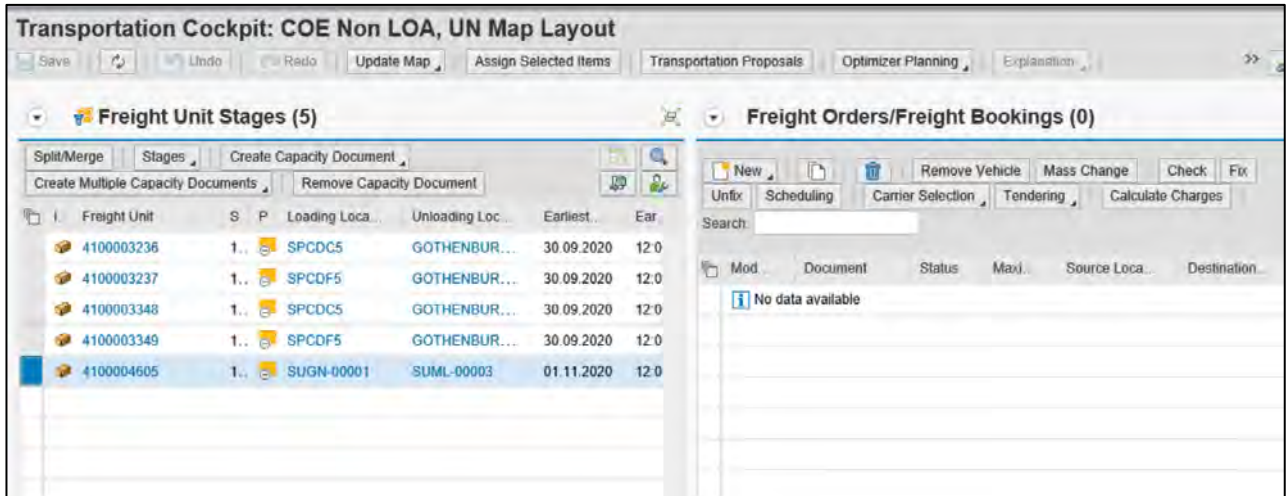
To create a new profile, press "New" . After settings are entered press "Save" .

The COE LOA/DAP profile entries should be checked from time to time to make sure that no Freight Units stay unplanned. This could happen when for example master data are missing.

After choosing the right planning profile click continue .

For EXW shipments choose the 'COE Non LOA' or if it should be without Air transportation proposals choose the 'COE non Air' profile:

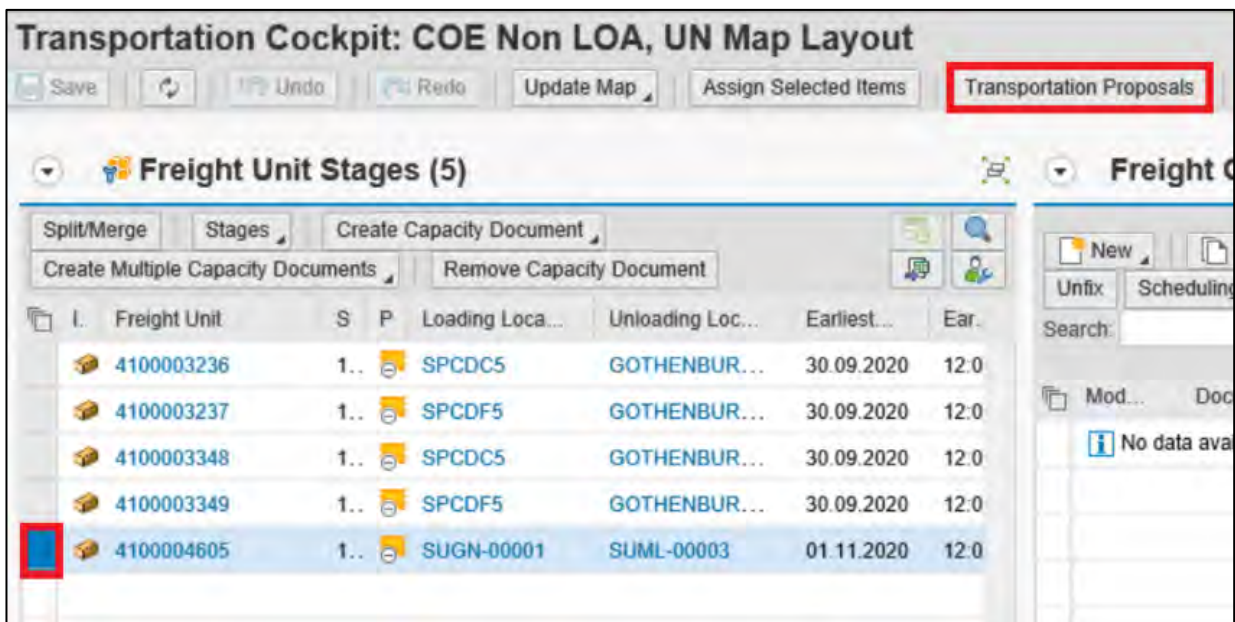
All Freight Units that have not been planned yet are displayed on the left side of the cockpit.



Look for your Freight Unit(s).

### Route Selection / Freight Order (FO) creation

Mark the line of the Freight Unit(s) that should be planned and go to 'Transportation Proposals' on the upper part of the screen.



Please note, if you mark two or more FUs at the same time, the system tries to consolidate those FUs, hence only FUs shipping from the same origin to same destination should be marked together.

**Transportation Proposals: Standard Layout**

**Transportation Proposals**

Define Filter

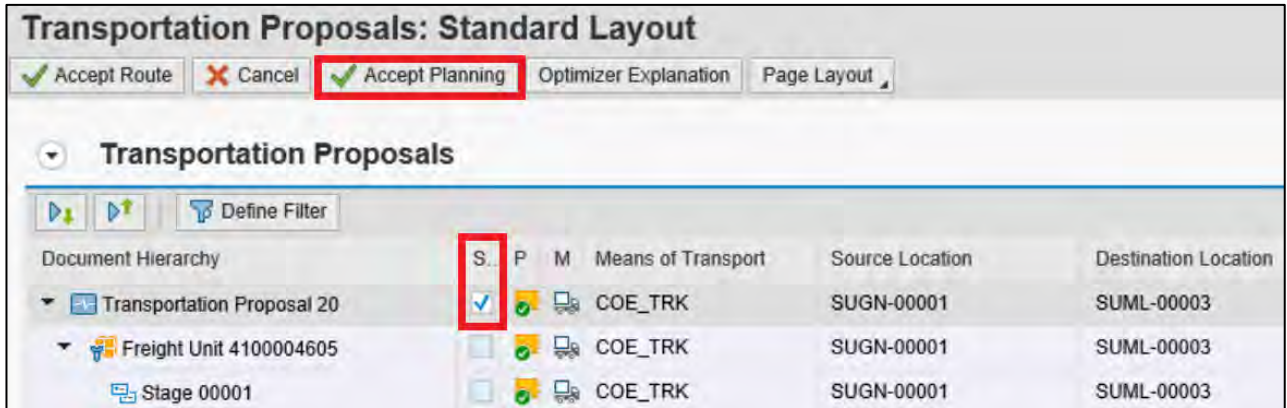
Document Hierarchy	S	P	M	Means of Transport	Source Location	Destination Location	Loading SL...
Transportation Proposal 20	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	SUGN-00001	SUML-00003	02.11.2020...
Freight Unit 4100004605	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	SUGN-00001	SUML-00003	02.11.2020...
Stage 00001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	SUGN-00001	SUML-00003	02.11.2020...
Transportation Proposal 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	SUGN-00001	SUML-00003	02.11.2020...
Freight Unit 4100004605	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	SUGN-00001	SUML-00003	02.11.2020...
Stage 00001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	SUGN-00001	CONAKRY_PORT	02.11.2020...
Stage 00002	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	CONAKRY_PORT	SUML-00003	24.11.2020...
Transportation Proposal 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	SUGN-00001	SUML-00003	02.11.2020...
Freight Unit 4100004605	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	SUGN-00001	SUML-00003	02.11.2020...
Stage 00001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	SUGN-00001	CONAKRY_PORT	02.11.2020...
Stage 00002	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	CONAKRY_PORT	GAO_AIRPORT	02.11.2020...
Stage 00003	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	GAO_AIRPORT	SUML-00003	25.11.2020...

Depending on how many possible connections (lanes) are available the system gives a maximum of 20 proposals. In case there is only one route it gets selected automatically. If an 'Optimizer Run' error occurs, it is most likely due to missing master data.

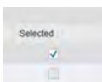
The "Means of Transport" shows which leg is transported by truck, vessel or plane.

Document Hierarchy	S	P	M	Means of Transport	Source Location	Destination Location
Transportation Proposal 3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	SUGN-00001	SUML-00003
Freight Unit 4100004605	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	SUGN-00001	SUML-00003
Stage 00001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	SUGN-00001	CONAKRY_PORT
Stage 00002	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	CONAKRY_PORT	BAMAKO_AIRPORT
Stage 00003	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	BAMAKO_AIRPORT	SUML-00003
Transportation Proposal 4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_SEA	SUGN-00001	SUML-00003
Freight Unit 4100004605	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_SEA	SUGN-00001	SUML-00003
Stage 00001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	SUGN-00001	CONAKRY_PORT
Stage 00002	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_SEA	CONAKRY_PORT	ABIDJAN_PORT
Stage 00003	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COE_TRK	ABIDJAN_PORT	SUML-00003

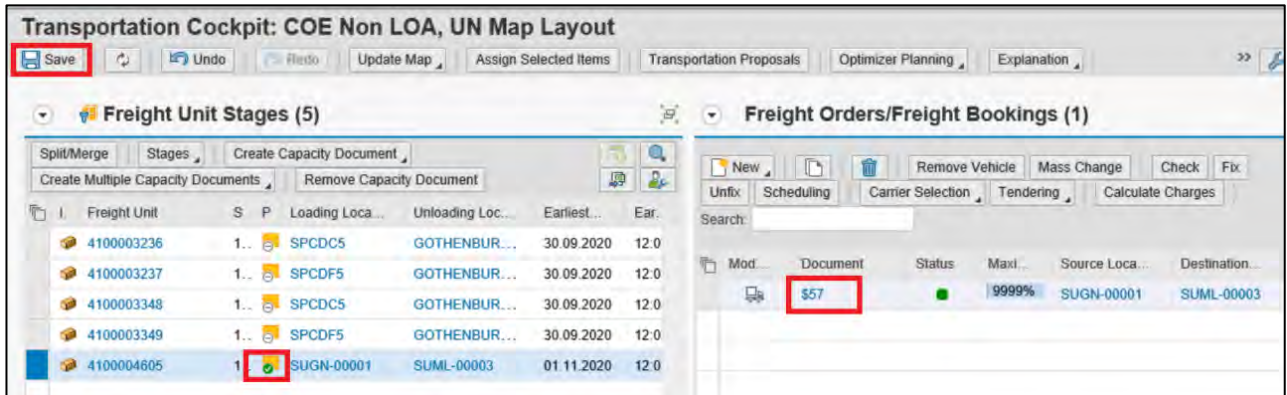
Stages/Freight Orders are proposed by means of transport and depending on the existing TM transportation network. The order in which the proposals are shown, depends on the sorting criteria. Please refer to section Personalize Transportation Proposals of this document to set up sorting criteria.



Select the desired route by marking 'selected'



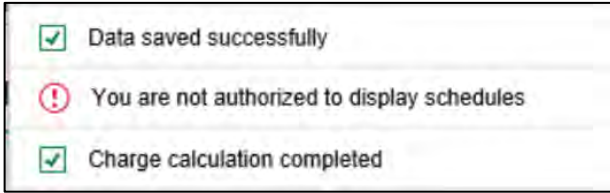
, then press 'Accept Planning' and the Freight Order(s) get proposed based on the chosen route.



The FU shows now on the left with 'green check mark' which means that it is planned. On the right side the Freight Order (FO) can be seen. The number shows as '\$' until "Save" on the top left is pressed. After saving the system gives a FO number starting with '61...'.



The FO is the document where among other data the estimated/actual charges and the SOW are stored. The estimated charge calculation is automatically executed when saving the FO(s). The FOs are used for event submission during the shipment.



Click on the Document '61..' number to get redirected to the FO document.

### Planning of Freight Units for multiple pick-up/drop-off locations

If a shipment has multiple pick-up or drop-off locations, each load list will be created as one FWO. If the shipments get combined for example at the load port, this can be reflected in TM. Please note that all the FWOs belonging to the same shipment need to have the same Buyer's reference number to be displayed on the same SOW.

In the TM planning cockpit choose one of the FUs to be planned. In the below example, there are 2 different FWOs that will be consolidated at the loading port and ship to the same final destination.

**Transportation Cockpit: COE-NON-LOA, UN Map Layout**

Save | Refresh | Undo | Redo | Update Map | Assign Selected Items | **Transportation Proposals**

Freight Unit Stages (6)

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

I.	O	Freight Unit	P...	Loading Location	Unloadin...	Original Order
		4100004957		BANGUI_AIRPORT	DAKAR_D...	UNMISS_SENAVU_C
		4100004960		SPCDC5	SPUGB4	MONUSCO_UGAISR
		4100004961		SPCDF5	SPUGB4	MONUSCO_UGAISR
		4100004963		BOMA_PORT	SPUGB4	MONUSCO_UGAFPU
		4100004965		SUCF-00005	SPDEB9	MINUSCA_DEUISR_C
		4100004966		SUCF-00004	SPDEB9	MINUSCA_DEUISR_C

Unfix | Scheduling | Search: | Mod... | Doc... | No data av...

Mark one of the FUs to be consolidated, then choose 'Transportation Proposals'.

Transportation Proposals: Standard Layout								
<input checked="" type="checkbox"/> Accept Route <input type="checkbox"/> Cancel <input checked="" type="checkbox"/> Accept Planning <input type="button" value="Optimizer Explanation"/> <input type="button" value="Page Layout"/>								
Transportation Proposals								
<input type="button" value="Define Filter"/>								
Document Hierarchy	Defa...	Selected	P	M	Means of Tran...	Source Location	Destination Location	Loading Sta
Transportation Proposal 1		<input type="checkbox"/>			COE_AIR	SUCF-00005	SPDEB9	31.12.2020
Freight Unit 4100004965		<input type="checkbox"/>			COE_AIR	SUCF-00005	SPDEB9	31.12.2020
Stage 00001		<input type="checkbox"/>			COE_TRK	SUCF-00005	BANGUI_AIRPORT	31.12.2020
Stage 00002		<input type="checkbox"/>			COE_AIR	BANGUI_AIRPORT	COLOGNE_AIRPORT	31.12.2020
Stage 00003		<input type="checkbox"/>			COE_TRK	COLOGNE_AIRPORT	SPDEB9	15.01.2021
Transportation Proposal 18		<input checked="" type="checkbox"/>			COE_SEA	SUCF-00005	SPDEB9	29.12.2020
Freight Unit 4100004965		<input type="checkbox"/>			COE_SEA	SUCF-00005	SPDEB9	29.12.2020
Stage 00001		<input type="checkbox"/>			COE_TRK	SUCF-00005	DOUALA_PORT	29.12.2020
Stage 00002		<input type="checkbox"/>			COE_SEA	DOUALA_PORT	ANTWERPEN_PORT	30.12.2020
Stage 00003		<input type="checkbox"/>			COE_TRK	ANTWERPEN_PORT	SPDEB9	15.01.2021

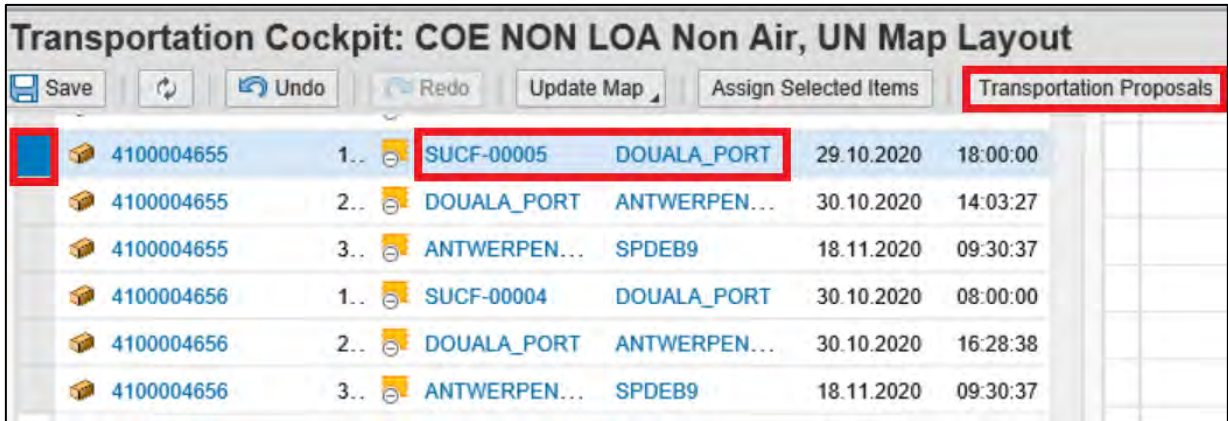
Choose the desired route but instead of 'Accept Planning', click on 'Accept Route'.

I..	Freight Unit	S	P	Loading Loca...	Unloading Loc...	Earliest...
	4100004965			SUCF-00005	DOUALA_...	31.12.2020
	4100004965			DOUALA_PORT	ANTWER...	30.12.2020
	4100004965			ANTWERPEN_PORT	SPDEB9	15.01.2021

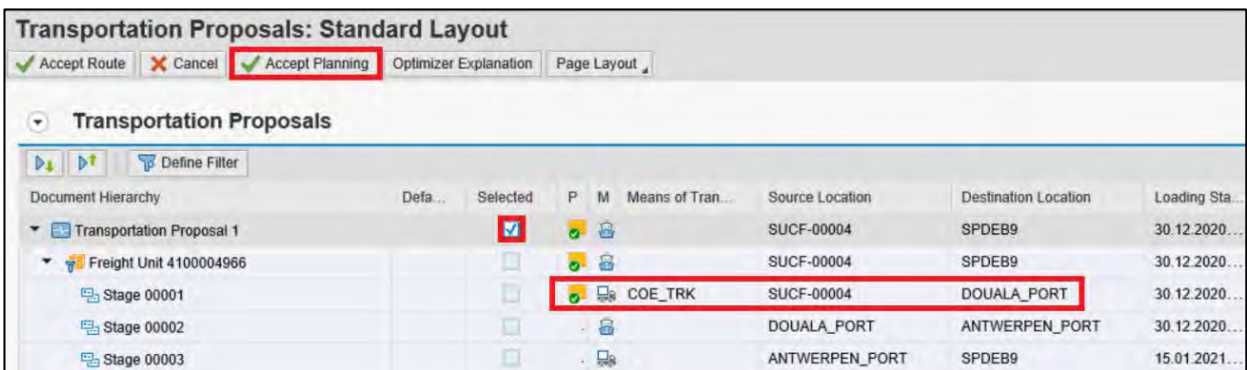
Through 'Accept Route' the FU was divided into different stages based on the route chosen but no FOs have been created. Repeat the process for the remaining FU(s). Please make sure that the routes match for the parts where the shipments should be combined, dates and times need to be the same on the parts to be consolidated.

After having parsed the FU into different stages, plan the FU stages in sequence. If pre- and main-carriage would be consolidated, mark those FUs (press & hold control) and choose 'Transportation Proposals'. The below example main- and on-carriage are going to be consolidated. Hence first the pre-carriages will be planned separately and afterwards the consolidation.

In exceptional cases when the consolidation transportation proposals do not show a combined proposal, try to plan the consolidation part of the shipment first, even if there is a pre-carriage that does not get combined and would sequentially need to be planned first.



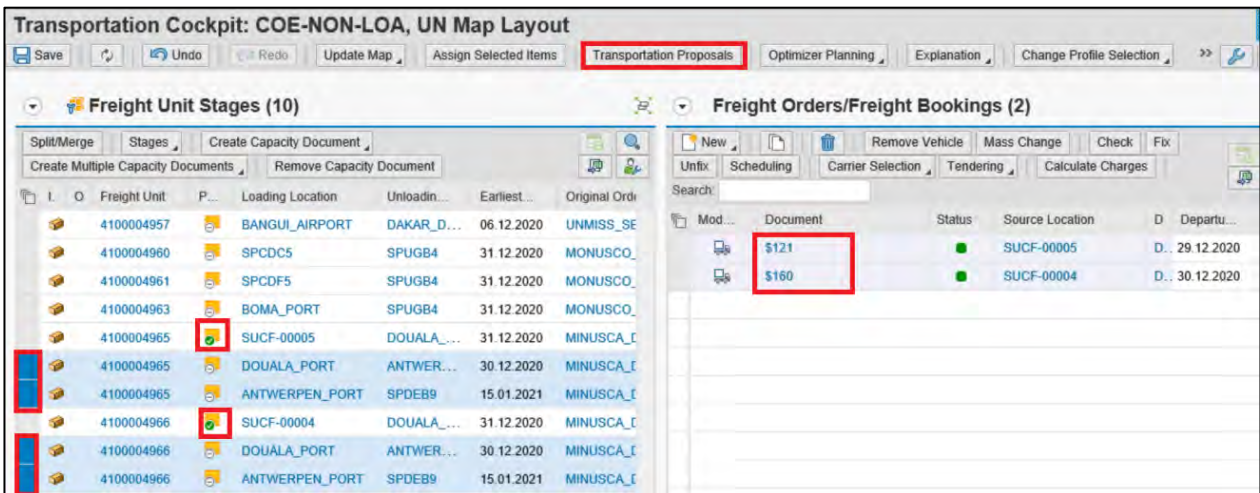
In the transportation proposals pick the correct routes and choose “Accept Planning”.



Repeat this for the other pre-carriage FU(s). Please note that the arrival date and time at consolidation location need to be the same.

Now in the cockpit the preliminary FOs for the pre-carriages show on the right with \$ sign and the FU stages on the left show as planned.

Mark the main-carriage and on-carriage FUs (press & hold control) to be consolidated and press “Transportation Proposals”.



Choose the correct proposal and click “Accept Planning”.



**Transportation Proposals: Standard Layout**

Accept Route  
  Cancel  
  Accept Planning  
 Optimizer Explanation  
 Page Layout

**Transportation Proposals**

Define Filter

Document Hierarchy	Defa...	Selected	P	M	Means of Tran...	Source Location	Destination Location	Loading Sta...
Transportation Proposal 1		<input checked="" type="checkbox"/>			COE_SEA		SPDEB9	29.12.2020...
Freight Unit 4100004965		<input type="checkbox"/>			COE_SEA	SUCF-00005	SPDEB9	29.12.2020...
Stage 00001		<input type="checkbox"/>			COE_TRK	SUCF-00005	DOUALA_PORT	29.12.2020...
Stage 00002		<input type="checkbox"/>			COE_SEA	DOUALA_PORT	ANTWERPEN_PORT	30.12.2020...
Stage 00003		<input type="checkbox"/>			COE_TRK	ANTWERPEN_PORT	SPDEB9	15.01.2021...
Freight Unit 4100004966		<input type="checkbox"/>			COE_SEA	SUCF-00004	SPDEB9	30.12.2020...
Stage 00001		<input type="checkbox"/>			COE_TRK	SUCF-00004	DOUALA_PORT	30.12.2020...
Stage 00002		<input type="checkbox"/>			COE_SEA	DOUALA_PORT	ANTWERPEN_PORT	30.12.2020...
Stage 00003		<input type="checkbox"/>			COE_TRK	ANTWERPEN_PORT	SPDEB9	15.01.2021...

All stages of the shipments show now as planned under Freight Unit Stages and a preliminary FO is displayed on the right. Press "Save" to confirm on the upper left.

**Transportation Cockpit: COE-NON-LOA, UN Map Layout**

Save  
 Undo  
 Redo  
 Update Map  
 Assign Selected Items  
 Transportation Proposals  
 Optimizer Planning  
 Explanation  
 Change Profile Select

**Freight Unit Stages (10)**

I	O	Freight Unit	P...	Loading Location	Unloadin...	Earliest...	Original Ord...
		4100004957		BANGUI_AIRPORT	DAKAR_D...	06.12.2020	UNMISS_SE
		4100004960		SPCDC5	SPUGB4	31.12.2020	MONUSCO
		4100004961		SPCDF5	SPUGB4	31.12.2020	MONUSCO
		4100004963		BOMA_PORT	SPUGB4	31.12.2020	MONUSCO
		4100004965		SUCF-00005	DOUALA...	31.12.2020	MINUSCA...
		4100004965		DOUALA_PORT	ANTWER...	30.12.2020	MINUSCA...
		4100004965		ANTWERPEN_PORT	SPDEB9	15.01.2021	MINUSCA...
		4100004966		SUCF-00004	DOUALA...	31.12.2020	MINUSCA...
		4100004966		DOUALA_PORT	ANTWER...	30.12.2020	MINUSCA...
		4100004966		ANTWERPEN_PORT	SPDEB9	15.01.2021	MINUSCA...

**Freight Orders/Freight Bookings (4)**

Mod...	Document	Status	Source Location
	\$121	●	SUCF-00005
	\$160	●	SUCF-00004
	\$198	●	DOUALA_PORT
	\$199	●	ANTWERPEN_PORT

After saving the FO numbers are displayed. For this example, there are 2 FOs for each pre-carriage, and 1 main-carriage as well as 1 on-carriage for the consolidated shipment parts.

**Freight Orders/Freight Bookings (4)**

New  
 Remove Vehicle  
 Mass Change  
 Check  
 Fix

Unfix  
 Scheduling  
 Carrier Selection  
 Tendering  
 Calculate Charges

Search:

Mod...	Document	Status	Source Location	D	Departu...
	6100017338	●	SUCF-00005	D..	29.12.2020
	6100017339	●	SUCF-00004	D..	30.12.2020
	6100017340	●	DOUALA_PORT	A..	30.12.2020
	6100017341	●	ANTWERPEN_PORT	S..	15.01.2021

The Freight Order document can be accessed directly from the cockpit by clicking on the document number starting with '61...'.

## Charge Calculation

On the FO 'Charges' tab the estimated and actual charges are shown by type of cargo. If an estimated rate for that route is stored in the TM charges table, the rate will show automatically in the 'Rate Amount' column. In the below case no rate is available, and therefore the rate amount is empty. In case estimated rates need to be uploaded and/or amended in the charge table, please reach out to the Master Data team.

The screenshot displays the SAP interface for a Freight Order (FO) document. The title bar reads "Display COE UN Planned Frt Order (non-LOA) 6100017003". The "Charges" tab is selected and highlighted in red. The "Edit" button in the top toolbar is also highlighted in red. The interface shows various data fields for invoicing, calculation, and currency. Below these fields, there are tabs for "Charge Items" and "Charge Analysis Log". A table of charges is visible, with the following data:

Charge Hierarchy	Logistical Reference	Rate Amount	R. Cur	M. Ra An	Ignore Calculation Rule	P. Unit	UoM	Quantity	Calculation Base	Calculated Amount
Sum										
Dummy Carrier / New Yo...										
Package 50										
Estimate Charge	10 - CONTAINER20		USD				1 M3		GROSS_VOLUME	
Estimate Charge	20 - VEHICLE		USD				1 M3	431	GROSS_VOLUME	
Estimate Charge	30 - TRAILER		USD				1 M3	159	GROSS_VOLUME	
Estimate Charge	40 - BREAKBULK		USD				1 M3		GROSS_VOLUME	

The transportation planner should enter 'estimated charges' for the movement if no rate was automatically populated or if the rate needs to be corrected. The charges need to be checked/entered for each FO of a shipment. The estimated charge will show on the SOW. To add charges, click on the 'edit' button on the top left.

**Edit COE UN Planned Frt Order (non-LOA) 6100017003**

Save Cancel Edit Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting Create Service Order Schedule Set Status Load Plan Status

General Data Business Partner Items Stages Utilization Subcontracting Document Flow Document References **Charges** Exec

Invoicing Status: 01 Not Invoiced Calculation Date: 29.10.2020  
 Charge Calc. Status: 02 Calculated Manually-Changed Calc. Date:   
 Total Amount in Local Currency: 66,030.00 USD Exchange Rate Date: 29.10.2020  
 Total Amount in Document Currency: 66,030.00 USD Manually-Changed Exchange Rate Date:   
 Rounded Total Amount in Document Currency: 66,030.00 USD  
 Rounded Amount Difference in Document Currency: 0.00 USD  
 Late Charges:

Charge Items Charge Analysis Log

Insert Views Show/Hide Details Multiple Rates Show/Hide Access Sequence Reset Charges

Charge Hierarchy	C... Code Type	Logistical Reference	Rate Amount	R... Curre	M... Ra An	Ignore Calculation Rule	P... Unit	UoM	Quantity	Calculation Base	Calculated Amount	C... An Cu
Sum												
Dummy Carrier / New Yo...												
Package 60												
Estimate Charge		10 - CONTAINER20		USD				1 M3		GROSS_VOLUME		U...
Estimate Charge		20 - VEHICLE	120.00	USD		<input checked="" type="checkbox"/>		1 M3	431	GROSS_VOLUME	51,720.00	J...
Estimate Charge		30 - TRAILER	90.00	USD		<input checked="" type="checkbox"/>		1 M3	156	GROSS_VOLUME	14,310.00	J...
Estimate Charge		40 - BREAKBULK		USD				1 M3		GROSS_VOLUME		U...
Actual Charge				USD				1 M3	690	GROSS_VOLUME		U...

The rate is entered per cbm in the "Rate Amount" column and the total calculated amount shows on the top of the document. Press enter after entering each amount and when finished press "Save".

**Edit COE UN Planned Frt Order (non-LOA) 6100014130**

Save Cancel Edit Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting Create Service Order Schedule Set Status >>

General Data Business Partner Items Stages Utilization Subcontracting Document Flow Document References **Charges** Business

Invoicing Status: 01 Not Invoiced Calculation Date: 20.08.2020 22:19:29 CET  
 Charge Calc. Status: 02 Calculated Manually-Changed Calc. Date:   
 Total Amount in Local Currency: 100,000.00 USD Exchange Rate Date: 20.08.2020  
 Total Amount in Document Currency: 100,000.00 USD Manually-Changed Exchange Rate...  
 Rounded Total Amount in Documen...: 100,000.00 USD  
 Rounded Amount Difference in Doc...: 0.00 USD  
 Late Charges:


Charge Items Charge Analysis Log

Insert Views Show/Hide Details Multiple Rates Show/Hide Access Sequence Reset Charges

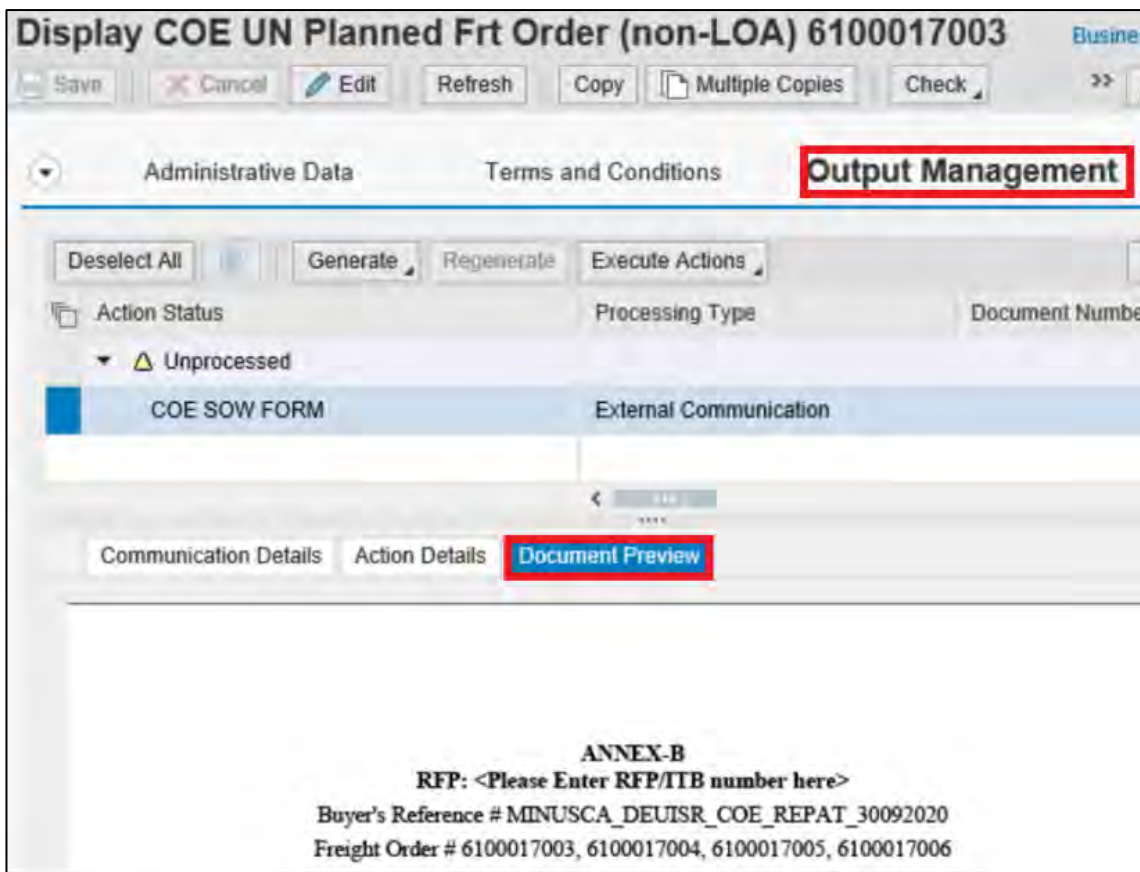
Charge Hierarchy	R... C... Code Type	Logistical Reference	Rate Amount	R... Curre	M... Ra An	Ignore Calculation Rule	P... Unit	UoM	Quantity	Calculation Base	Calculated Amount	C... An Cu
Sum												
Dummy Carrier / New Yo...												
Package 70												
Estimate Charge		10 - OUTBOUND_FLIGHT	50,000.00	USD		<input checked="" type="checkbox"/>		1 EA	2	QUANTITY_VAL	100,000.00	
Estimate Charge		20 - DEPOSITIONING_FLIGHT		USD				1 EA	1	QUANTITY_VAL		
Estimate Charge		30 - CONTAINER20		USD				1 EA	11	QUANTITY_VAL		
Estimate Charge		40 - VEHICLE		USD				1 EA	22	QUANTITY_VAL		
Estimate Charge		50 - TRAILER		USD				1 EA	33	QUANTITY_VAL		

For Air shipments the charges are entered per flight. In above case there are two outbound flights at cost of 50,000 \$. Save. The different cargo and flight types originate from the FWO upload file.

## SOW Generation & Download

The SOW form is displayed on the FO 'Output Management' tab. If the 'Output Management' tab is not visible search through the  icon on the right. After clicking the icon all available tabs show up, then choose 'Output Management'. Please note that for COE the following is in development (as of November 2020): In case that parts of the shipment are transported by UN owned carriers, the UN owned carrier should be assigned in TM before the SOW is downloaded. The FOs/legs where the UN owned carrier is assigned, will not be displayed on the SOW. UN carrier codes are 'C- plus plant code', example for MINUSCA: C-CF10.

Mark the 'COE SOW Form' line. Then press the 'Document Preview'.



**Display COE UN Planned Frt Order (non-LOA) 6100017003** Business

Save Cancel Edit Refresh Copy Multiple Copies Check >>

Administrative Data Terms and Conditions **Output Management**

Deselect All Generate Regenerate Execute Actions

Action Status Processing Type Document Number

Unprocessed

**COE SOW FORM** External Communication

Communication Details Action Details **Document Preview**

**ANNEX-B**  
**RFP: <Please Enter RFP/ITB number here>**  
Buyer's Reference # MINUSCA\_DEUISR\_COE\_REPAT\_30092020  
Freight Order # 6100017003, 6100017004, 6100017005, 6100017006

The SOW is in pdf format and can be amended after it was downloaded. When hovering over the top of the document the 'save' and 'print' options show.

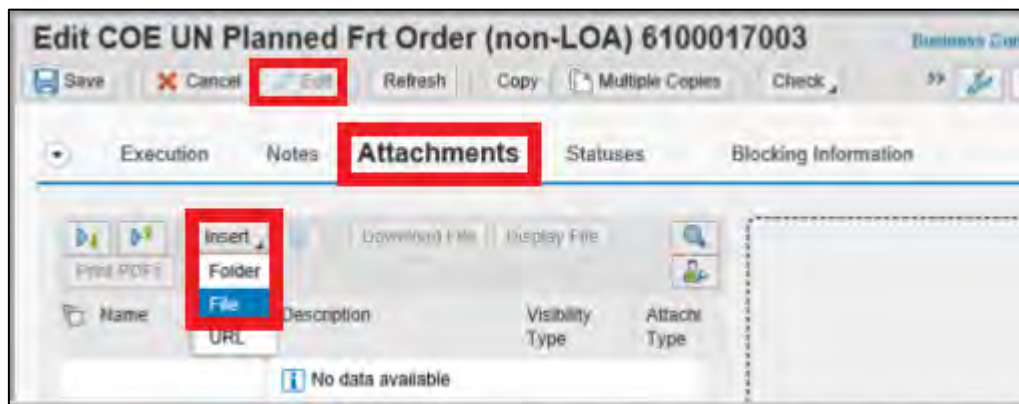


To amend the SOW, it needs to be downloaded. It is suggested to open it in Word directly for editing and not through pdf converter. Adjust the SOW to fit the specific requirements for the transport request.

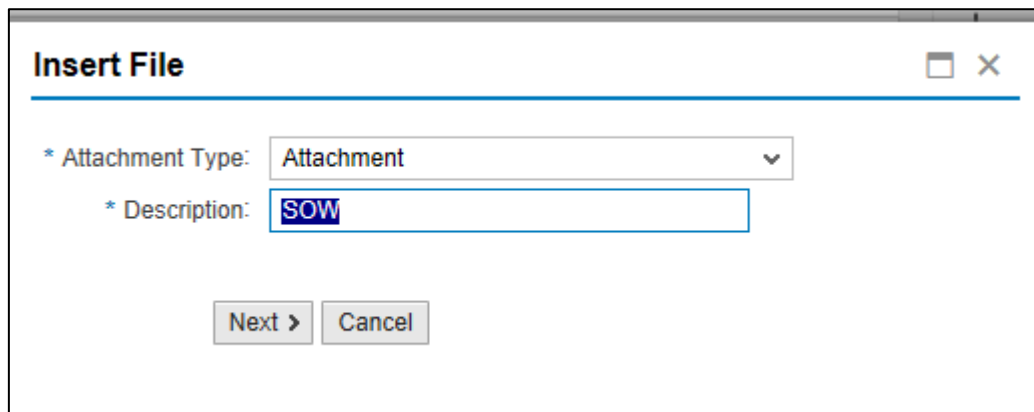
After finalizing the SOW, the Freight Shopping Cart needs to be created in SRM. The SOW must be attached to the shopping cart. Please do not create Freight Shopping Carts with \$1 value but with estimated freight cost.

The final SOW also needs to be uploaded in TM. To do this, go in the Freight Order to the 'Attachments' tab.

Switch to 'Edit' mode. Then click on 'Insert'.



Choose 'File' to upload the SOW.



Enter a description for your file and click 'Next'.

**Insert File**

Attachment Type: Attachment

Description: SOW

\* Content:  Browse...

OK Cancel

Browse for the file to be uploaded and then click ok. If the file is stored on SharePoint, please follow the instructions in the section **Upload documents from SharePoint to TM** in this document.

**Edit COE UN Planned Frt Order (non-LOA) 6100011775**

Save Cancel Edit Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting

Attachments Statuses Administrative Data Terms and Conditions Document Reference

Insert Download File Display File Print PDFs View Link

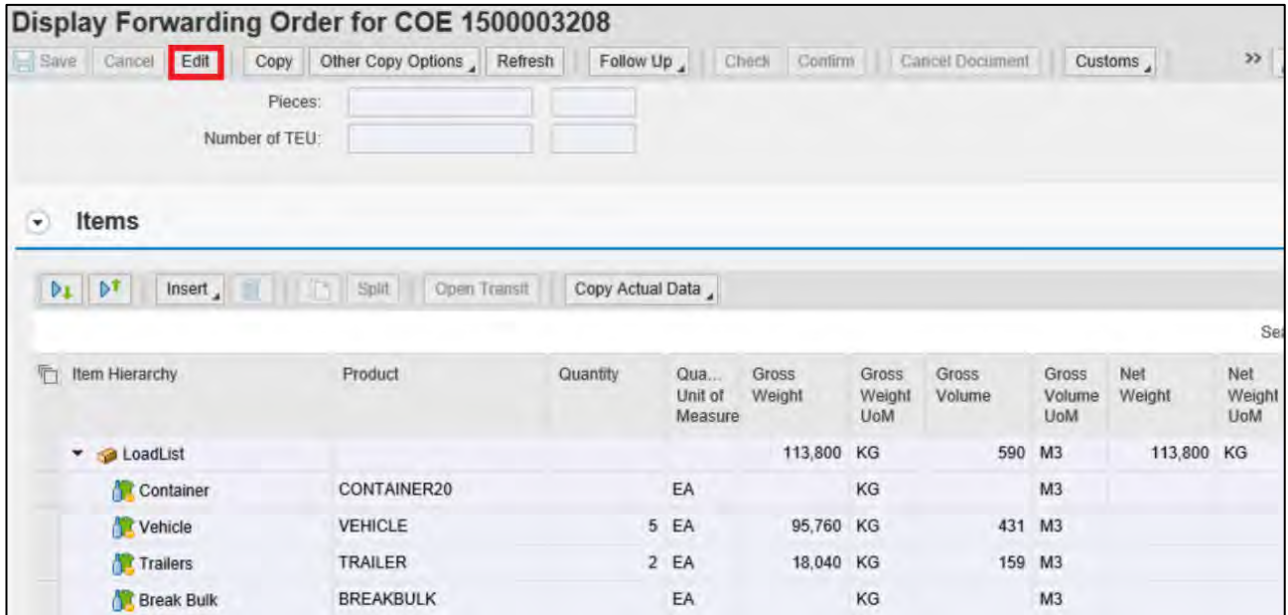
Name	Description	Visibility Type	Attachment Type	URL	Com Size
	SOW	Internal	Attachment		82.7

The attachment will show on the attachment tab. Press 'Save'. As default the attachment will show as internal, this means the freight forwarder cannot see the attachment. Attachments that should be seen by external parties, would need to be switched to 'external' for the visibility type.

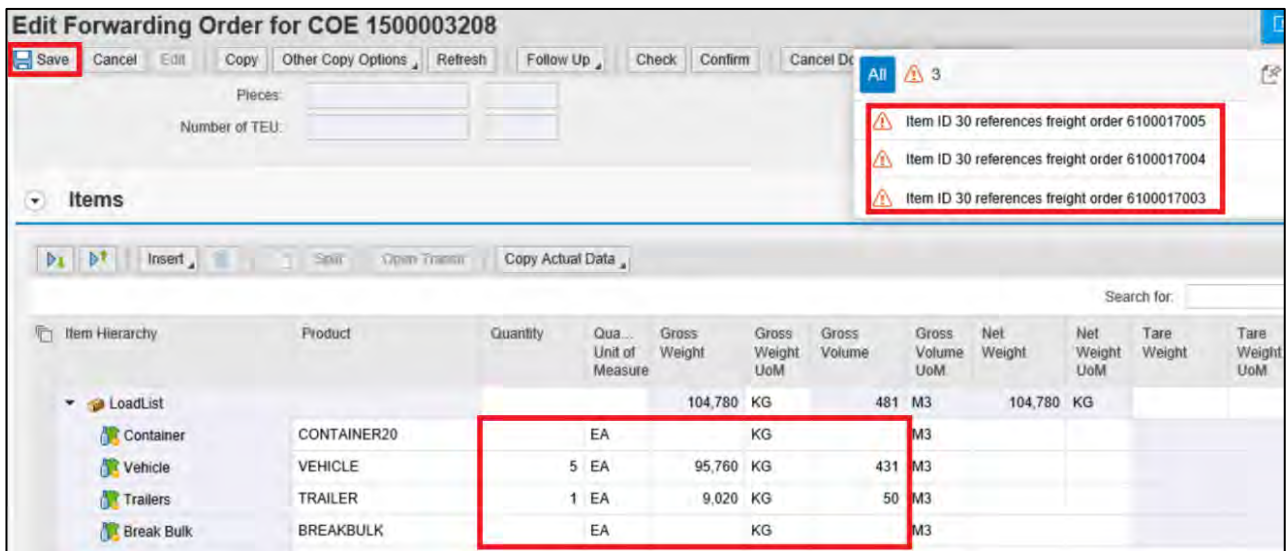
PD/procurement/responsible colleagues need to be informed about the requirements. After PD/procurement/responsible colleagues have finalized the bidding process, PD/procurement/responsible colleagues are required to update the TM Freight Order(s) with the awarded carrier, Freight PO number from SRM, date and location/route correction (if applicable). PD/procurement/responsible colleagues will also update the actual cost for the shipment on each FO. The carrier is shown on the 'General Data' tab and the SRM Freight PO on the 'Document References' tab.

### Change of Forwarding Order (FWO) in TM

In case the Forwarding Order needs to be changed, first click on the 'Edit' mode. If changes to quantity, weight, volume happen after FWO upload, they can be changed on the FWO directly and will update on the Freight Order (if any yet) automatically. Changes to Source and Destination location cannot be updated and the FWO would need to be canceled and a new FWO would need to be uploaded.



In 'Edit' mode the quantity, weight, volume and other data can be changed.



After changing the data, a warning is given if Freight Orders exist already. Save.

The area m<sup>2</sup> fields are custom fields and if the area needs to be changed, the change must happen on the item data. To change the area, mark the line of the load list item in 'Edit' mode that needs to be changed.

Scroll down and click on 'Document References', then update the 'Item' field with the correct area in m<sup>2</sup>. After updating the area, press 'Save'.

**Edit Forwarding Order for COE 150003208**

Save Cancel Edit Copy Other Copy Options Refresh Follow Up Check Confirm Cancel Document Customs

LoadList				104,780	KG	481	M3	104,780	KG
Container	CONTAINER20	EA			KG		M3		
Vehicle	VEHICLE	5 EA		95,760	KG	431	M3		
Trailers	TRAILER	1 EA		9,020	KG	50	M3		
Break Bulk	BREAKBULK	EA			KG		M3		

Details: Vehicle 20

Details Quantities Notes Document References Customs

Insert

Business Transaction Docume...	Document...	Document Type for Business...	Item	Business Transaction...	BTD Item Ty
			117	ZAR	Area (M2)

To go back in 'Display' mode, click 'Cancel'.

**Edit Forwarding Order for COE 150003208**

Save Cancel Edit Copy Other Copy Options Refresh

The Freight Order(s) item(s) were updated automatically:

**Display COE UN Planned Frt Order (non-LOA) 6100017003**

Save Cancel Edit Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting Create Service Order

General Data Business Partner **Items** Stages Utilization Subcontracting Document Flow Do

**All Items**

Change Hierarchy: All Items Insert (Choose Item Type) Insert Create Service Order Adjust Subitems

Forwarding Order

Item Hierarchy	Item Type	Item Type (Description)	Qua...	Qua... UoM	Gross Weight	Gross Weight UoM	Gross Volume	Gross Volume UoM
Active Vehicle COE_SEA	TRUC	Truck			597,220	KG	3,793	M3
Forwarding Order for COE 150003208					104,780	KG	481	M3
COE Non-LOA Frt Unit 4100004655					104,780	KG	481	M3
Package 50	PACK	Package			104,780	KG	481	M3
Product 10 CONTAINER20	PRD	Product		EA		KG		M3
Product 20 VEHICLE	PRD	Product	5	EA	95,760	KG	431	M3
Product 30 TRAILER	PRD	Product	1	EA	9,020	KG	50	M3
Product 40 BREAKBULK	PRD	Product		EA		KG		M3

The area field is displayed on the FO under 'Items' and 'Document References' and was updated automatically with the FWO update.



**Display COE UN Planned Frt Order (non-LOA) 6100017003**

Save Cancel Edit Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting Create Service Order

Product	PRD	Product	EA	KG	M3
Product 20 VEHICLE	PRD	Product	5 EA	95,760 KG	431 M3
Product 30 TRAILER	PRD	Product	1 EA	9,020 KG	50 M3
Product 40 BREAKBULK	PRD	Product	EA	KG	M3
Forwarding Order for COE 150003209				492,440 KG	3,312 M3
COE Non-LOA Frt Unit 4100004656				492,440 KG	3,312 M3
Package 100				492,440 KG	3,312 M3
Product 60 CONTAINER20	PRD	Product	74 EA	427,690 KG	2,722 M3
Product 70 VEHICLE	PRD	Product	EA	KG	M3
Product 80 TRAILER	PRD	Product	3 EA	2,850 KG	47 M3
Product 90 BREAKBULK	PRD	Product	18 EA	61,900 KG	543 M3

**Product 20 VEHICLE**

FWO Data Quantities Business Partner Details Notes Content Identification Document References Nature of Goods Commodity Codes Cus

Business Transaction Document ID	Document... for Business Transaction	Document Type for Business Transaction (Desc.)	Busin... Transacti Documen	BTD Item Type Code (Desc.)	Item	Busine Transa Docum
			ZAR	Area (M2)	117	

### Deletion of Forwarding Order (FWO) in TM

Please note that existing Freight Orders for the Forwarding Order need to be deleted separately. They will not get deleted automatically when the Forwarding Order is cancelled. The Freight Orders should get deleted before the FWO is cancelled. Freight Orders that are already in status 'execution' cannot be deleted anymore as the shipment has departed already.

In case the Forwarding Order needs to be deleted, first click on edit mode in the upper left corner.

**Edit Forwarding Order for COE 150003208**

Save Cancel Edit Copy Other Copy Options Refresh Follow Up Check Confirm Cancel Document

Click 'Cancel Document'.

**Cancel Document**

Setting the status to "Canceled" cannot be reverted. Continue anyway?

Reason for Cancellation:

OK Cancel

Confirm with 'OK'.

**Display Forwarding Order for COE 150002215**

Save Cancel Edit Copy Other Copy Options >> Page Forward

**Statuses** Output Management Document References

**Statuses**

Life Cycle Status: **Canceled**

Confirmation Sta...: Not Confirmed

Aggr. Org. Intera...: Not Relevant

Planning Status: Planned

Execution Status: Execution Not Started

**Blocking Information**

Plan...:  Not Blocked

Exe...:  Not Blocked

Set Manual Block

Block Details

Block Block

The Life Cycle Status shows now as canceled.

## Freight Unit (FU) in TM

A **Freight Unit (FU)** represents a set of goods that are transported together across the entire transportation chain (*smallest unit that can be transported*). The Freight Unit (FU) has a 1:1 relationship with the FWO and is the base document for planning in TM.

The “General Data” tab displays data copied from the FWO and shows under “Organizational Data” which group/unit is responsible for transportation planning and which for freight buying.

**Display COE Non-LOA Frt Unit 4100004962**

Save Cancel Edit Follow Up Check Direct Shipment SplitMerge Unassign Default Route Remove Unplanned Steps Fixing Cancel Document Customs

General Data Business Partner Document Flow Notes Attachments Direct Shipment Options Statuses Administrative Data Execution Customs Output Management

**General Information**

Description: MONUSCO\_LGAPFU\_COE\_REFAT\_31122020

Freight Unit Type: ZFU2 COE Non-LOA Frt Unit

Shipping Type: ZRE Repatriation

Movement Type: EXW Ex Works

Insystem Location: [ ]

Dangerous Goods:

No ADR Exemption:

Points acc. to ADR 1.1.3.B: [ ]

Freight Unit Billing Rule: ZFU2\_TM\_COE Defaults applied

HBL or HAWB: [ ] Not Finalized

Transportation Mode: [ ]

**Required Capacity**

Weight: 443.000 KG

Volume: [ ]

Pieces: [ ]

Density Factor: 0

**Source**

Location: BOMA\_PORT Boma-Port

**Destination**

Location: SPUGB4 UNSOM Entebbe

UNSCOM "Suko Road." / Entebbe

**Transportation**

Total Distance: [ ] KM

Gross Duration/Total Net Duration: 358:00

**Organizational Data**

Purchasing Organization: PO\_1000 United Nations Purchasing Org.

Planning Group: PG\_S02 PD Strat. Mov Team

Planning and Execution Organization: PE\_1000 United Nations Planning & Execution Org.

Org. Unit Group: PE\_PS02 Planning & Execution Strat. Mov

The “Document Flow” tab shows predecessor documents such as the FWO and successor documents such as Freight Order(s) if planned already.

Display COE Non-LOA Frt Unit 4100004962

Save Cancel Edit Follow Up Check Direct Shipment Split/Merge Unassign Default Route Remove Unplanned Stages Fixing Cancel Document Customs

General Data Business Partner Document Flow Notes Attachments Direct Shipment Options Statuses Administrative Data

Display

Document Hierarchy	Business Document Ty...	Business Document	Business Document Life...	Created By	Created On Date/Time
COE Non-LOA Frt Unit 4100004962	COE Non-LOA Frt Unit	4100004962	In Process	01PLCOEPS02	04.12.2020 04:52:10 CET
Predecessor Business Documents					
Forwarding Order for COE 1500003429	Forwarding Order for COE	1500003429	Planned	01PLCOEPS02	04.12.2020 04:52:10 CET
Successor Business Documents					
COE UN Planned Frt Order (non-LOA) 610001...	COE UN Planned Frt O...	6100017335	In Process	01PLCOEPS02	04.12.2020 04:55:59 CET
COE UN Planned Frt Order (non-LOA) 610001...	COE UN Planned Frt O...	6100017336	In Process	01PLCOEPS02	04.12.2020 04:55:59 CET

The FU "Stages" tab shows only one stage before the planning for EXW and DAP shipments. The "Document" field is empty.

Display COE Non-LOA Frt Unit 4100004961

Save Cancel Edit Follow Up Check Direct Shipment Split/Merge Unassign Default Route Remove Unplanned Stages Fixing Cancel Document Customs

Administrative Data Execution Customs Output Management Stages HBL or HAWB

Insert Merge Route Schedule Freight Document Set OI Status Determine Distance and Duration Change Incoterms

Change Destination Location

Stage Des...	Stage Type	Transporta... Mode	Document	Source Location	Destination Location	Requested Pick-Up Date	Requested Delivery Date	I... Co (Sc	City (So...
Stage 1	03 (Main Carriage)			SPCDF5	SPUGB4	31.12.2020	15.01.2021		Goma

After planning the FU stages will display stages according to the route and means of transport chosen. One stage equals one freight order. The Freight Order number can be seen in the "Document" field.

Display COE Non-LOA Frt Unit 4100004962

Save Cancel Edit Follow Up Check Direct Shipment Split/Merge Unassign Default Route Remove Unplanned Stages Fixing Cancel Document Customs

Execution Customs Output Management Stages HBL or HAWB

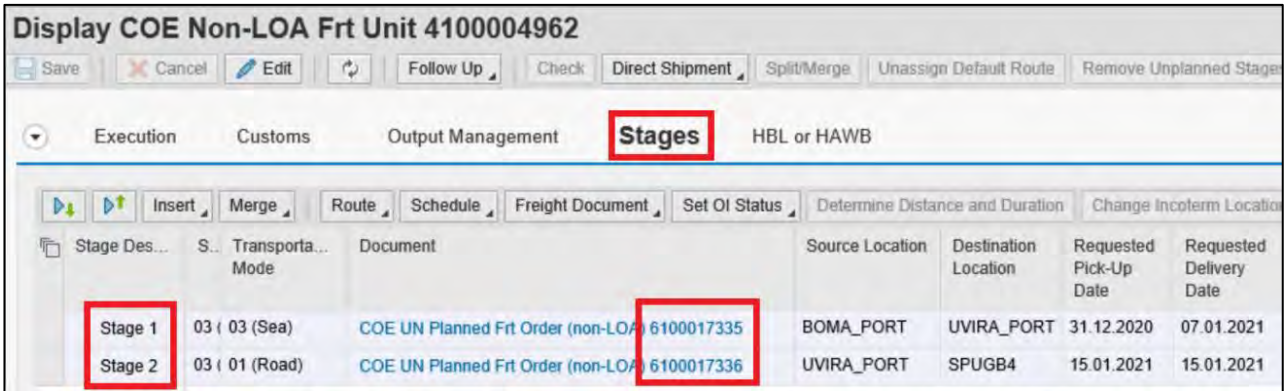
Insert Merge Route Schedule Freight Document Set OI Status Determine Distance and Duration Change Incoterms Location

Stage Des...	S..	Transporta... Mode	Document	Source Location	Destination Location	Requested Pick-Up Date	Requested Delivery Date
Stage 1	03 ( 03 (Sea)		COE UN Planned Frt Order (non-LOA) 6100017335	BOMA_PORT	UVIRA_PORT	31.12.2020	07.01.2021
Stage 2	03 ( 01 (Road)		COE UN Planned Frt Order (non-LOA) 6100017336	UVIRA_PORT	SPUGB4	15.01.2021	15.01.2021

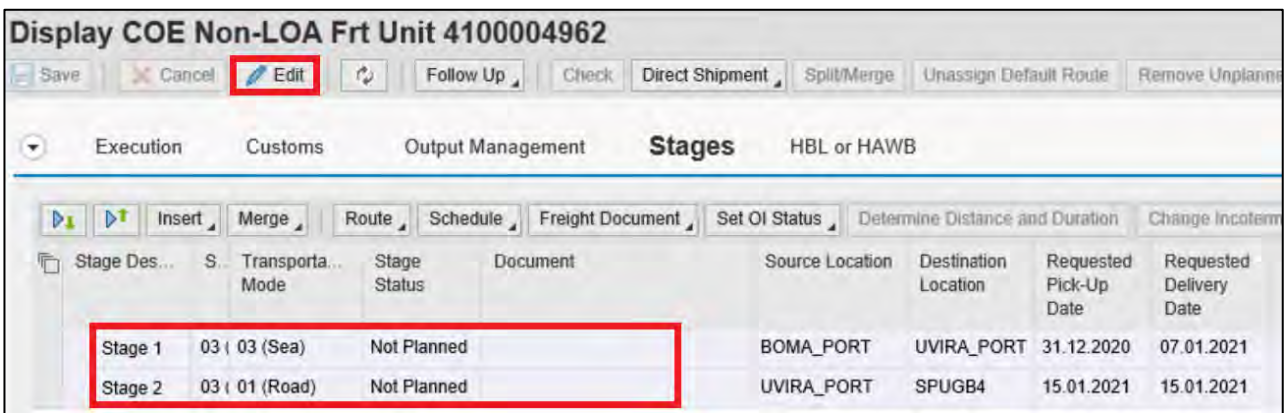
### Deletion of Freight Unit

Sometimes it is necessary to delete the FU(s) in TM. In cases where a re-planning is necessary, besides the existing Freight Order(s) if any, the FU needs to be deleted as otherwise the re-planning can only be done with the same route.

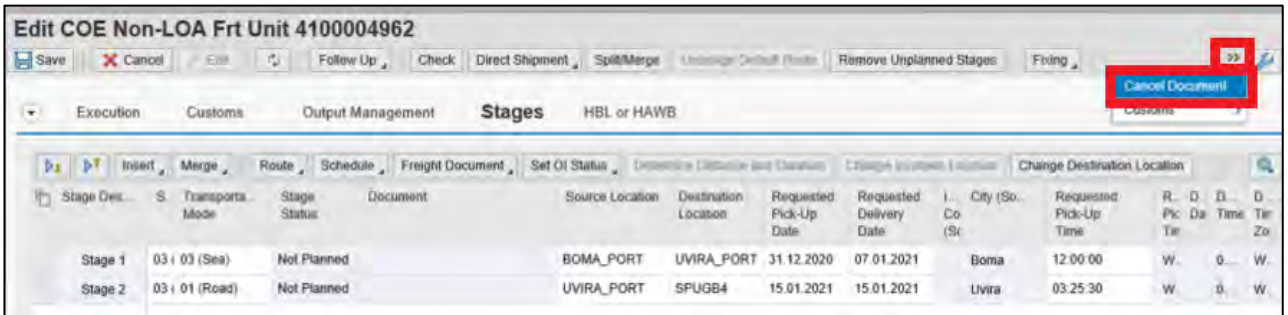
The "Stages" tab shows after planning different stages and the respective Freight Order(s).



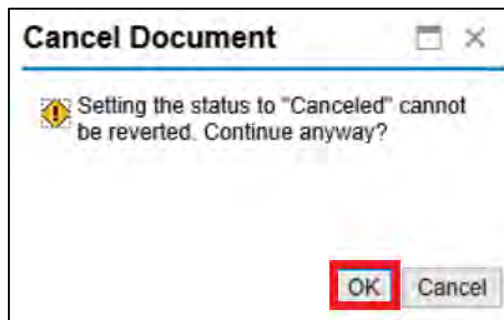
After deleting the FOs, the document field is empty on the FU “Stages” tab. To delete the FU, click “Edit” on the upper left.



Click on the ‘arrows’  on the upper right. Choose “Cancel Document”.



Confirm with “OK”. The FU is now deleted. The system will generate a new FU automatically.



The newly created FU has only one unplanned stage. New planning can now be executed.

## Chapter 7. Troops Detailed process

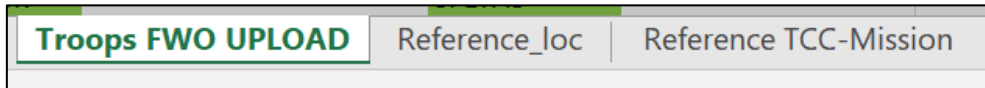
All strategic and tactical troops movements should be uploaded in TM. LTC movements are also uploaded in TM but follow a different process. Separate Job Aids exist for the LTC upload in TM. The below describes the process for short term charter and LOA troops movements.

### Creation of Forwarding Order (FWO) in TM

To create a Forwarding Order in TM for a troops movement an Excel upload file needs to be prepared. The Forwarding Order reflects mainly the number of passengers, flights, cabin & cargo baggage, TCC/PCC, mission, type of movement, origin/destination and movement dates. A Forwarding Order represents troops that travel from origin to destination together.

#### Excel Upload File for Strategic Movements

The Excel File has several tabs.



**Troops FWO UPLOAD** - includes the Macro to create the .txt and .xlsx file. The .txt file is used for the upload in TM. For Troops all data are entered on this tab.

Please make sure that no fields are filled with '#N/A', example:

Source Loc Desc	Source Loc
Meiss El-Jebel	#N/A
Meiss El-Jebel	#N/A
Meiss El-Jebel	#N/A
Meiss El-Jebel	#N/A
Meiss El-Jebel	#N/A

In such cases there might be a misspelling, or the requested data does not exist. Please check your entries. For Master Data requests please refer to: [How to request Master Data for TM.](#)

All red mark entries need to be checked and updated for each movement. Below a rotation example is shown.

Source City	Source Loc	Dest City	Dest Loc	Pick-Up (From) Date	Delivery (To) Date	Product	Weight (KG)	Volume (M3)	Quantity	TOD	Mov.Type	Base	BTD Ref	IncoTerm	TCC	Member Country	Mission	Receiving Plant	
Beledweyne	BELEDWEYNE_AIRPORT	Tripoli	TRIPOLI_KYE_AIRPOR	18/09/2020	20/09/2020	CHALKS			1	12	ZRO	UNSMIL_NPLFPU_PAX_ROT0_18092020		NPL		1111000114	UNSMIL	LY20	
Beledweyne	BELEDWEYNE_AIRPORT	Tripoli	TRIPOLI_KYE_AIRPORT	18/09/2020	20/09/2020	CARGOBAGGAGE	15640	85	680	12	ZRO	UNSMIL_NPLFPU_PAX_ROT0_18092020	EXW	"Nepal"	1111000114	UNSMIL	LY20		
Beledweyne	BELEDWEYNE_AIRPORT	Tripoli	TRIPOLI_KYE_AIRPORT	18/09/2020	20/09/2020	CABINBAGGAGE	1360	17	170	12	ZRO	UNSMIL_NPLFPU_PAX_ROT0_18092020	EXW	"Nepal"	1111000114	UNSMIL	LY20		
Beledweyne	BELEDWEYNE_AIRPORT	Tripoli	TRIPOLI_KYE_AIRPORT	18/09/2020	20/09/2020	INBOUND_FLIGHT			1	12	ZRO	UNSMIL_NPLFPU_PAX_ROT0_18092020	EXW	"Nepal"	1111000114	UNSMIL	LY20		
Beledweyne	BELEDWEYNE_AIRPORT	Tripoli	TRIPOLI_KYE_AIRPORT	18/09/2020	20/09/2020	POSITIONING_FLIGHT			1	12	ZRO	UNSMIL_NPLFPU_PAX_ROT0_18092020	EXW	"Nepal"	1111000114	UNSMIL	LY20		
Beledweyne	BELEDWEYNE_AIRPORT	Tripoli	TRIPOLI_KYE_AIRPORT	18/09/2020	20/09/2020	TROOPS			170	12	ZRO	UNSMIL_NPLFPU_PAX_ROT0_18092020	EXW	"Nepal"	1111000114	UNSMIL	LY20		
Tripoli	TRIPOLI_KYE_AIRPORT	Beledweyne	BELEDWEYNE_AIRPOR	18/09/2020	20/09/2020	CHALKS			1	12	ZRO	UNSMIL_NPLFPU_PAX_ROT0_18092020	EXW	"Nepal"	1111000114	UNSMIL	LY20		
Tripoli	TRIPOLI_KYE_AIRPORT	Beledweyne	BELEDWEYNE_AIRPOR	18/09/2020	20/09/2020	CARGOBAGGAGE	15640	85	680	12	ZRO	UNSMIL_NPLFPU_PAX_ROT0_18092020	EXW	"Nepal"	1111000114	UNSMIL	LY20		
Tripoli	TRIPOLI_KYE_AIRPORT	Beledweyne	BELEDWEYNE_AIRPOR	18/09/2020	20/09/2020	CABINBAGGAGE	1360	17	170	12	ZRO	UNSMIL_NPLFPU_PAX_ROT0_18092020	EXW	"Nepal"	1111000114	UNSMIL	LY20		
Tripoli	TRIPOLI_KYE_AIRPORT	Beledweyne	BELEDWEYNE_AIRPOR	18/09/2020	20/09/2020	DEPOSITIONING_FLIGHT			1	12	ZRO	UNSMIL_NPLFPU_PAX_ROT0_18092020	EXW	"Nepal"	1111000114	UNSMIL	LY20		
Tripoli	TRIPOLI_KYE_AIRPORT	Beledweyne	BELEDWEYNE_AIRPOR	18/09/2020	20/09/2020	OUTBOUND_FLIGHT			1	12	ZRO	UNSMIL_NPLFPU_PAX_ROT0_18092020	EXW	"Nepal"	1111000114	UNSMIL	LY20		
Tripoli	TRIPOLI_KYE_AIRPORT	Beledweyne	BELEDWEYNE_AIRPOR	18/09/2020	20/09/2020	TROOPS			170	12	ZRO	UNSMIL_NPLFPU_PAX_ROT0_18092020	EXW	"Nepal"	1111000114	UNSMIL	LY20		
										Unit:									
										Seq. No	18/09/2020								
Source Locations		Destination Locations																	
BELEDWEYNE_AIRPORT		TRIPOLI_KYE_AIRPORT																	
#NUM!	#NUM!	#NUM!	TRIPOLI_MJI_AIRPORT																
#NUM!	#NUM!	#NUM!	TRIPOLI_PORT																

Below the Source Location and Destination Location are further entries (in green) to show all existing locations for the same city, in this case Meiss El Jebel (source) and Kathmandu (destination). The VLOOKUP will always show the first found location in the upload file.

Please note that for the rotation file the first flight is for the Inbound & Positioning Flight. In case the outbound flight is supposed to happen first, please control this through the 'Pick-Up' and 'Delivery Date'. Troops air movements are planned from airport to airport.

Source City	Source Loc	Dest City	Dest Loc	Pick-Up (From) Date	Delivery (To) Date	Product
Beledweyne	BELEDWEYNE_AIRPORT	Tripoli	TRIPOLI_KYE_AIRPORT	18/09/2020	20/09/2020	CHALKS
Beledweyne	BELEDWEYNE_AIRPORT	Tripoli	TRIPOLI_KYE_AIRPORT	18/09/2020	20/09/2020	CARGOBAGGAGE
Beledweyne	BELEDWEYNE_AIRPORT	Tripoli	TRIPOLI_KYE_AIRPORT	18/09/2020	20/09/2020	CABINBAGGAGE
Beledweyne	BELEDWEYNE_AIRPORT	Tripoli	TRIPOLI_KYE_AIRPORT	18/09/2020	20/09/2020	INBOUND_FLIGHT
Beledweyne	BELEDWEYNE_AIRPORT	Tripoli	TRIPOLI_KYE_AIRPORT	18/09/2020	20/09/2020	POSITIONING_FLIGHT
Beledweyne	BELEDWEYNE_AIRPORT	Tripoli	TRIPOLI_KYE_AIRPORT	18/09/2020	20/09/2020	TROOPS
Tripoli	TRIPOLI_KYE_AIRPORT	Beledweyne	BELEDWEYNE_AIRPORT	18/09/2020	29/09/2020	CHALKS
Tripoli	TRIPOLI_KYE_AIRPORT	Beledweyne	BELEDWEYNE_AIRPORT	18/09/2020	29/09/2020	CARGOBAGGAGE
Tripoli	TRIPOLI_KYE_AIRPORT	Beledweyne	BELEDWEYNE_AIRPORT	18/09/2020	29/09/2020	CABINBAGGAGE
Tripoli	TRIPOLI_KYE_AIRPORT	Beledweyne	BELEDWEYNE_AIRPORT	18/09/2020	29/09/2020	DEPOSITIONING_FLIGHT
Tripoli	TRIPOLI_KYE_AIRPORT	Beledweyne	BELEDWEYNE_AIRPORT	18/09/2020	29/09/2020	OUTBOUND_FLIGHT
Tripoli	TRIPOLI_KYE_AIRPORT	Beledweyne	BELEDWEYNE_AIRPORT	18/09/2020	29/09/2020	TROOPS



After all data are entered, click the Macro button:

to generate the TM upload file. Save the .txt file to an easily accessible location.

**Fields mandatory to be filled:**

- Source City: For Troops Air movements the location is an Airport
- Dest. City: For Troops Air movements the location is an Airport
- Pick Up date: DD/MM/YYYY (needs to be today or future date)
- Delivery date: DD/MM/YYYY (needs to be today or future date)
- TOD: rotation cycle (6 or 12 months); based on this number the baggage allowance is automatically calculated
- Troops: Number of passengers (for rotations update both, in and outgoing passenger number)
- Unit: 3-digit code of Troops unit to be moved such as BAT, AVU etc.
- Incoterm: EXW for non-LOA movements, DAP for LOA movements
- TCC/PCC: country name. The 3-digit ISO country code is derived from this field for the reference number.
- Mission Name: To be filled only if 'Paste Summary' tab is not used

**Other fields:**

Number of estimated inbound/outbound flights: automatically calculated based on total passenger number (plane capacity set at 220). If the expected flight number is different as per formula, it is

recommended to update the flight number after the .txt upload file was generated to not overwrite the templated formula or save a local copy of the file.

Reference Number: Mission\_TCC/PCC&UNIT\_PAX\_MovementType\_PickUpDate; Please note this string can be maximum 35 characters. Filled through formula. Needs to be the same number for the inbound and outbound flight of rotations otherwise they are not displayed on the same SOW.

Movement type: ZDE = Deployment, ZRE = Repatriation, ZRO = Rotation, ZTR = Intra-mission, ZTE = Inter-mission

Cargo baggage: Automatically filled based on rotation cycle

Cabin baggage: Automatically filled based on rotation cycle

Shipper: Automatically filled through formula

Consignee: Automatically filled through formula

### Reference\_Loc

This tab contains all the locations that existed in TM as Master Data at the point of go-live. Later requested pick-up/destination locations, ports or airports need to be added manually in order to make them available for the VLOOKUP.

Ideally, upload templates for COE and Troops get updated each time a new location was created.

	A	B
1	City	Location id [20 Characters] - in UPPER CASE
2	Abu Dhabi	SUAE-00001
3	Dubai	SUAE-00002
4	Ras Al-Khaimah	SUAE-00003
5	Sharjah	SUAE-00004
6	Herat	SUAF-00001
7	Jalalabad	SUAF-00002
8	Kabul	SUAF-00003
9	Kandahar	SUAF-00004
10	Kunduz	SUAF-00005
11	Mazar-e-Sharif	SUAF-00006
12	Pul-e-Khumri	SUAF-00007
13	Durres	SUAL-00001
14	Tirana	SUAL-00002
15	Yerevan	SUAM-00001
16	Luanda	SUAO-00001
17	Buenos Aires	SUAR-00001
18	Mar Del Plata	SUAR-00002
19	Gotzendorf	SUAT-00001

There are different types of locations:

'SU + 2-digit country code -5-digit number' are COE pick-up/drop-off locations (created in ECC and transferred to TM)

'SP + 2-digit country code -5-digit number' are UNOE shipping points (created in ECC and transferred to TM)

'City\_AIRPORT' are airports created directly in TM (if more than 1 in the same city the IATA code is added such as BANGKOK\_DMK\_AIRPORT)

'City\_PORT' are ports created directly in TM

It is suggested to insert a row where the location fits best. Insert a row (right click on left and "insert"). Please note that locations should be entered exactly as they were created in TM, location ID letters should be in upper case.

If a Troops AIR upload file needs to be updated, please insert the Airport before other location with the same city name. Example, Constanta. If the Airport is entered before the port and any other location named "Constanta", the VLOOKUP will find the Airport first and display it on the FWO UPLOAD sheet, which would be correct for a Troops AIR movement.

	City	Location id [20 Characters] - in UPPER
155	Comayagua	COMAYAGUA_AIRPORT
156	Conakry	CONAKRY_AIRPORT
157	Conakry	CONAKRY_PORT
158	Constanta	CONSTANTA_AIRPORT
159	Constanta	CONSTANTA_PORT
160	Constantine	CONSTANTINE_AIRPORT
161	Copenhagen	COPENHAGEN_AIRPORT

### Reference TCC-Mission

This tab contains the TCC/PCC country names and their Business Partner (BP) numbers as well as the 3-digit country ISO code. For the missions, the names and the TM plant codes are shown. The data are used for VLOOKUPS to display the BPs and plant codes on the Upload file.

	Name	BP Number	ISO cod
7	ANDORRA	1111000185	AND
8	PALAU	1111000186	PLW
9	NAURU	1111000187	NRU
0	TUVALU	1111000188	TUV
1	TIMOR-LESTE	1111000189	TLS
2	TONGA	1111000190	TON
3	SOUTH SUDAN	1111000191	#N/A
4	KIRIBATI	1111000194	KIR
5	UNAMA	AF10	
6	UNAMA	AF10	
7	SABT	BI21	
8	MONUSCO	CD10	
9	MINUSCA	CF10	



## Excel Upload File for Tactical Movements

The structure of the upload file is the same as for strategic movements, for detailed explanations please see the section Excel Upload File for Strategic Movements of this document. There is a difference in the responsibilities for Intra/Inter mission movements and therefore in the Sales\_Group field of the upload file. To segregate the responsibilities and the subsequent roles in TM, the same org structure as for STO movements was implemented for intra/inter mission Troops movements.

Formulas in the file determine the Sales\_Group based on the Incoterm and which mission is responsible for the transportation planning. EXW = receiving mission plans, DAP = sending mission plans. For intra mission movements please use Incoterm DAP.

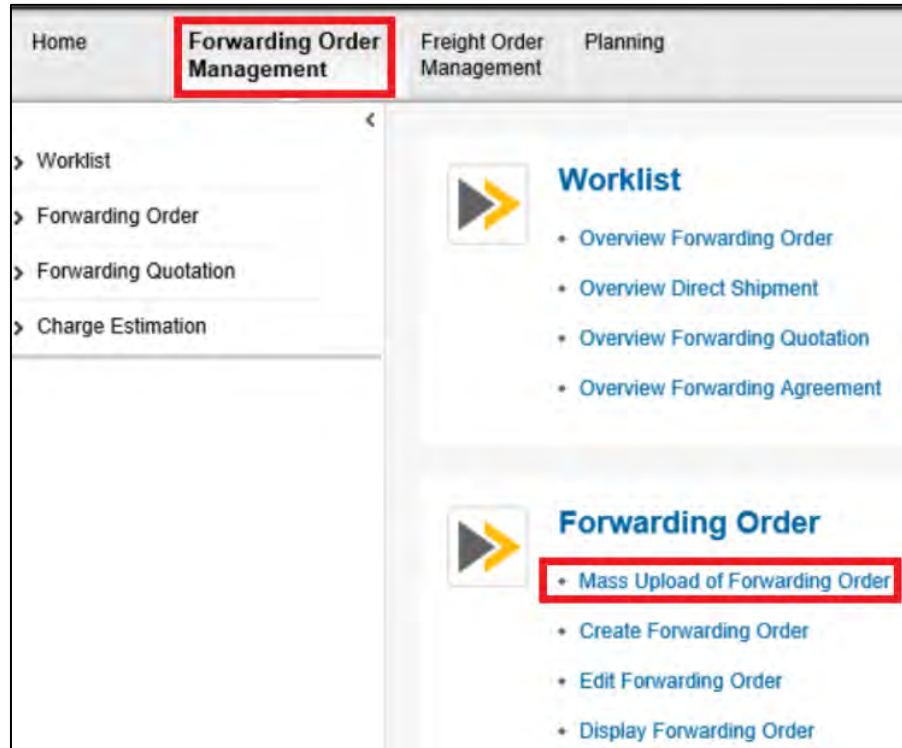
All fields marked in red need to be filled on the 'Troops FWO UPLOAD' tab. The 'Instructions' tab gives guidance. As movement can either INTER or INTRA be chosen. The mission name in the reference number depends on the planning mission, for EXW cases, the receiving mission is displayed and for DAP cases, the sending mission is displayed.

Product	Item_Type	Item Category	Weight (KG)	Volume (M3)	Quantity	TOD	Mov.Type	Base BTD Ref	Sales Group	Incoterm	TCC	Sending Plant [Shipper]	Sending Mission	Receiving Plant [Consignee]	Area	Member Country	Receiving Mission
CHALKS	ZCHS	PKG			1		ZTR	MINUSCA_SENPFU2_PAX_INTRA_14112025G_T73		DAP	*Senegal*	CF10	MINUSCA	CF10		1111000143	MINUSCA
CARGOBAGGAGE	ZCRB	PRD	12880	70	560		12 ZTR	MINUSCA_SENPFU2_PAX_INTRA_14112025G_T73		DAP	*Senegal*	CF10	MINUSCA	CF10		1111000143	MINUSCA
CABINBAGGAGE	ZCRB	PRD	1120	14	140		12 ZTR	MINUSCA_SENPFU2_PAX_INTRA_14112025G_T73		DAP	*Senegal*	CF10	MINUSCA	CF10		1111000143	MINUSCA
INBOUND_FLIGHT	ZTRS	PRD			1		12 ZTR	MINUSCA_SENPFU2_PAX_INTRA_14112025G_T73		DAP	*Senegal*	CF10	MINUSCA	CF10		1111000143	MINUSCA
POSITIONING_FLIGHT	ZTRS	PRD			1		12 ZTR	MINUSCA_SENPFU2_PAX_INTRA_14112025G_T73		DAP	*Senegal*	CF10	MINUSCA	CF10		1111000143	MINUSCA
TROOPS	ZTRS	PRD			140		12 ZTR	MINUSCA_SENPFU2_PAX_INTRA_14112025G_T73		DAP	*Senegal*	CF10	MINUSCA	CF10		1111000143	MINUSCA
CHALKS	ZCHS	PKG			1		12 ZTR	MINUSCA_SENPFU2_PAX_INTRA_14112025G_T73		DAP	*Senegal*	CF10	MINUSCA	CF10		1111000143	MINUSCA
CARGOBAGGAGE	ZCRB	PRD	12696	69	552		12 ZTR	MINUSCA_SENPFU2_PAX_INTRA_14112025G_T73		DAP	*Senegal*	CF10	MINUSCA	CF10		1111000143	MINUSCA
CABINBAGGAGE	ZCRB	PRD	1104	13.8	138		12 ZTR	MINUSCA_SENPFU2_PAX_INTRA_14112025G_T73		DAP	*Senegal*	CF10	MINUSCA	CF10		1111000143	MINUSCA
DEPOSITIONING_FLIGHT	ZTRS	PRD			1		12 ZTR	MINUSCA_SENPFU2_PAX_INTRA_14112025G_T73		DAP	*Senegal*	CF10	MINUSCA	CF10		1111000143	MINUSCA
OUTBOUND_FLIGHT	ZTRS	PRD			1		12 ZTR	MINUSCA_SENPFU2_PAX_INTRA_14112025G_T73		DAP	*Senegal*	CF10	MINUSCA	CF10		1111000143	MINUSCA
TROOPS	ZTRS	PRD			176		12 ZTR	MINUSCA_SENPFU2_PAX_INTRA_14112025G_T73		DAP	*Senegal*	CF10	MINUSCA	CF10		1111000143	MINUSCA
										Unit:							
										Ref:							
										Movement:							
										Seq. No:							
										14/11/2020							

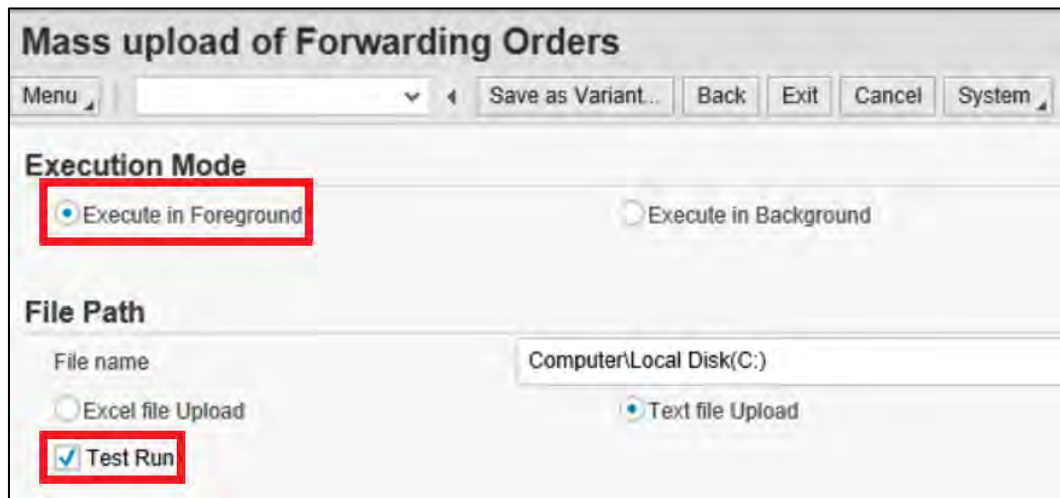
Shipper and Consignee will be filled automatically based on formulas connected to the sending mission and receiving mission.


## TXT upload in TM

After logging into TM NWBC, click on "Forwarding Order Management".



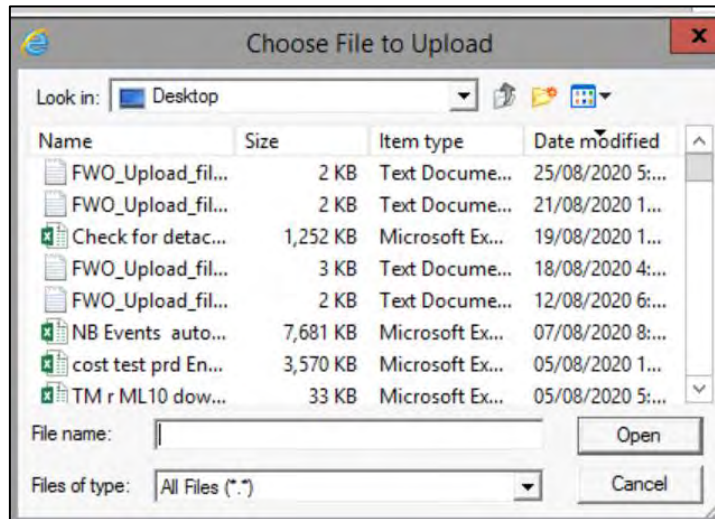
Choose 'Mass Upload of Forwarding Order'.



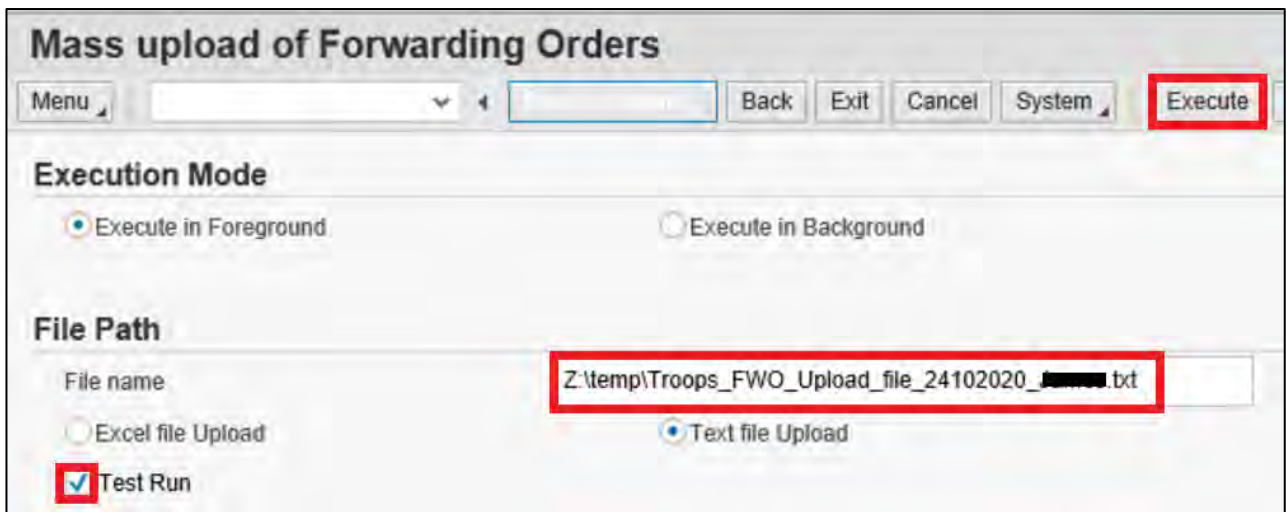
Choose 'Execute in Foreground' and mark 'Test Run'. Then Choose the .txt file to be uploaded by clicking on the squares  at the right of the 'File name' entry box.



Confirm with 'OK'.



Click on the file to be uploaded. It will then show in the 'File Name'.



Press 'Execute' on the upper right.

Mass upload of Forwarding Orders										
Menu		Back	Exit	Cancel	System	Details	Select all		Sort in Ascending Order	So
Message	Validation	FWO ID	Status	FWO Type	Movement T	Source Location	Destination Location	Pick Up Da	Pick Up Ti	
				ZFW2	ZRO	EL FASHER_AIRPORT	ADDIS ABABA_AIRPO...	30/10/2020	08:00:00	
				ZFW2	ZRO	EL FASHER_AIRPORT	ADDIS ABABA_AIRPO...	30/10/2020	08:00:00	
				ZFW2	ZRO	EL FASHER_AIRPORT	ADDIS ABABA_AIRPO...	30/10/2020	08:00:00	
				ZFW2	ZRO	EL FASHER_AIRPORT	ADDIS ABABA_AIRPO...	30/10/2020	08:00:00	
				ZFW2	ZRO	EL FASHER_AIRPORT	ADDIS ABABA_AIRPO...	30/10/2020	08:00:00	
				ZFW2	ZRO	EL FASHER_AIRPORT	ADDIS ABABA_AIRPO...	30/10/2020	08:00:00	
				ZFW2	ZRO	ADDIS ABABA_AIRPO...	EL FASHER_AIRPORT	30/10/2020	08:00:00	
				ZFW2	ZRO	ADDIS ABABA_AIRPO...	EL FASHER_AIRPORT	30/10/2020	08:00:00	
				ZFW2	ZRO	ADDIS ABABA_AIRPO...	EL FASHER_AIRPORT	30/10/2020	08:00:00	
				ZFW2	ZRO	ADDIS ABABA_AIRPO...	EL FASHER_AIRPORT	30/10/2020	08:00:00	
				ZFW2	ZRO	ADDIS ABABA_AIRPO...	EL FASHER_AIRPORT	30/10/2020	08:00:00	
				ZFW2	ZRO	ADDIS ABABA_AIRPO...	EL FASHER_AIRPORT	30/10/2020	08:00:00	

Check if the data are correct. All validations must show in green. If there are errors, the validation will show in red and by clicking on the message on the left, you can see what the error is. Please correct the error and reupload the file.

Go 'back'  and unmark the test run  Test Run . Execute again. Now the Forwarding order is uploaded and an FWO number in TM is given. In this case there are two FWOs as it is a rotation (inbound/outbound flights):

Mass upload of Forwarding Orders										
Menu		Back	Exit	Cancel	System	Details	Select all	Deselect all	Sort in Ascending Order	Sort in desc
Message	Validation	FWO Number	Status	FWO Type	Movement T	Source Location	Destination Location	Pick Up Da	Pick Up Ti	
		<b>1500003205</b>		ZFW2	ZRO	EL FASHER_AIRPORT	ADDIS ABABA_AIRPO...	30/10/2020	08:00:00	
				ZFW2	ZRO	EL FASHER_AIRPORT	ADDIS ABABA_AIRPO...	30/10/2020	08:00:00	
				ZFW2	ZRO	EL FASHER_AIRPORT	ADDIS ABABA_AIRPO...	30/10/2020	08:00:00	
				ZFW2	ZRO	EL FASHER_AIRPORT	ADDIS ABABA_AIRPO...	30/10/2020	08:00:00	
				ZFW2	ZRO	EL FASHER_AIRPORT	ADDIS ABABA_AIRPO...	30/10/2020	08:00:00	
				ZFW2	ZRO	EL FASHER_AIRPORT	ADDIS ABABA_AIRPO...	30/10/2020	08:00:00	
		<b>1500003204</b>		ZFW2	ZRO	ADDIS ABABA_AIRPO...	EL FASHER_AIRPORT	30/10/2020	08:00:00	
				ZFW2	ZRO	ADDIS ABABA_AIRPO...	EL FASHER_AIRPORT	30/10/2020	08:00:00	
				ZFW2	ZRO	ADDIS ABABA_AIRPO...	EL FASHER_AIRPORT	30/10/2020	08:00:00	
				ZFW2	ZRO	ADDIS ABABA_AIRPO...	EL FASHER_AIRPORT	30/10/2020	08:00:00	
				ZFW2	ZRO	ADDIS ABABA_AIRPO...	EL FASHER_AIRPORT	30/10/2020	08:00:00	
				ZFW2	ZRO	ADDIS ABABA_AIRPO...	EL FASHER_AIRPORT	30/10/2020	08:00:00	

By clicking on the FWO number the FWO document can be accessed directly from the Mass upload.

**Display Forwarding Order for COE Troops 1500003205**

Save Cancel Edit Copy Other Copy Options Refresh Follow Up Check Confirm Cancel Document Customs Page Forwarding Order

**General Data** Business Partner Locations and Dates/Times Ordered Route Actual Route Nature of Goods Document Flow

**Forwarding Order Data**

\* Document Type: ZFW2  
 Description: Forwarding Order for COE Troops  
 Order Date: 27.10.2020  
 Life Cycle Status: In Planning  
 HAWB No.:  
 HAWB Status: Not Finalized  
 MAWB No.:  
 Buyer's Reference Number: **UNAMID\_ETHBAT\_PAX\_ROT0\_30102020**  
 Cross-Trade Forwarding Order:  
 Import Decl. by LSP:  
 Insurance by LSP:  
 Controlled:   
 External Freight Agreement:

**Organizational Data**

Sales Organization: SO\_1000 United Nations Sales Org  
 Sales Office:  
 Sales Group: SG\_S01 PD Aviation Team  
 Person Responsible:

**Settlement Terms**

Incoterm: **EXW** Ex Works  
 Incoterm Location:  
 Freight Term:

**Notes**

The 'Buyer's Reference Number' is a unique code for this shipment or several shipments that should be displayed on the same SOW, the pick-up date is at the end. For rotation cases the string is set to be the same through a setting on the Excel Upload file.

Depending on the Incoterm the system either automatically created Freight Orders or the Transportation Planner must carry out the planning. EXW = non-LOA, planning is done by UN. DAP = LOA, TM creates Freight Orders automatically.

**Display Forwarding Order for COE Troops 1500003205**

Save Cancel Edit Copy Other Copy Options Refresh Follow Up Check Confirm Cancel Document Customs Page Forwarding Order

**Document Flow**

Document Hierarchy	Business Document Type (Des...)	Business Document	Business Document Life Cycle...	Created By	Cr
Forwarding Order for COE Troops 1500003205	Forwarding Order for COE Tro...	<b>1500003205</b>	In Planning	01PLTROOPS01	27
Successor Business Documents					
COE Non-LOA Troops 4100004609	COE Non-LOA Troops	4100004609	New	01PLTROOPS01	27

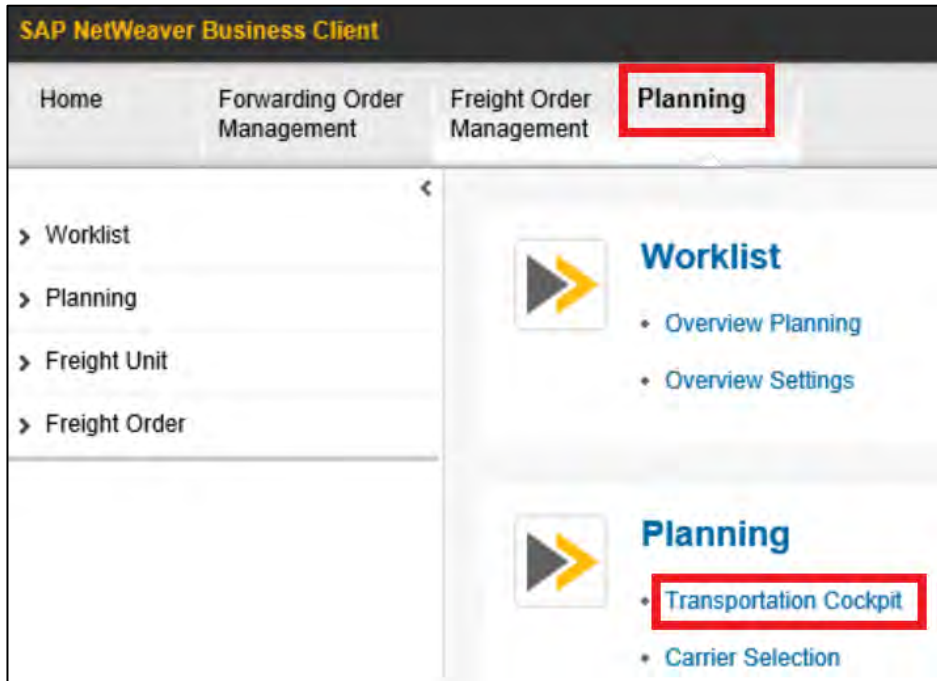
On the 'Document Flow' tab associated documents can be seen. The Freight Unit (FU) is created automatically for all documents and starts with '41...'. The FU is used in the transportation cockpit and represents troops that travel from origin to destination together. As the above is an EXW example no Freight Orders (FOs) starting with '61...' have been created yet.

**Display Forwarding Order for COE Troops 1500003205**

Save Cancel Edit Copy Other Copy Options Refresh **Follow Up**

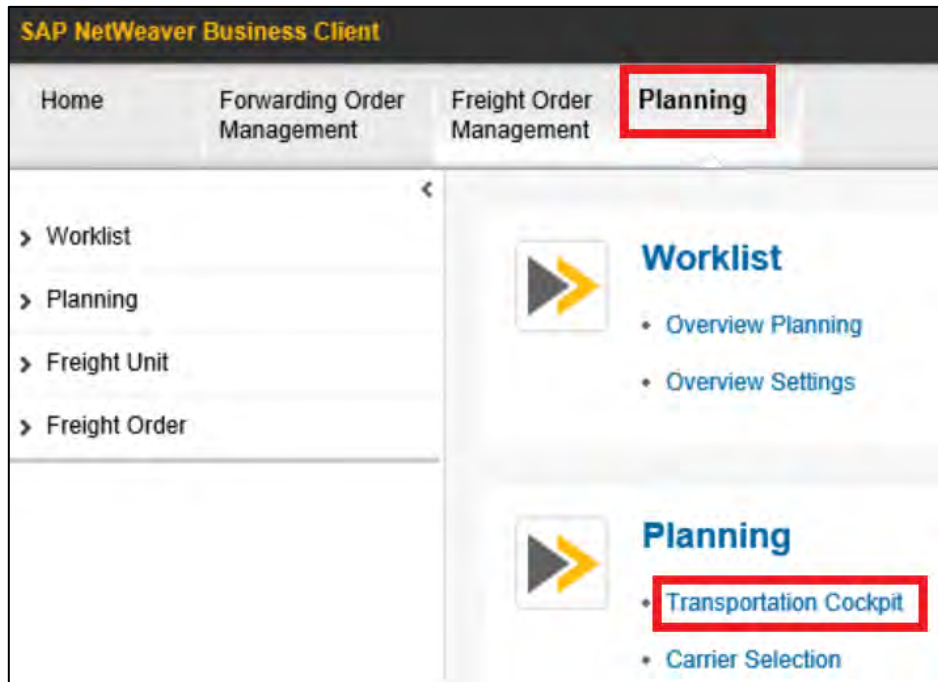
Follow Up

To plan the Freight Order(s) go to 'Follow Up' at the top of the FWO document and choose 'Start Transportation Cockpit'. Alternatively, the planning cockpit can be accessed from the TM main page.



### Troops Planning Profiles

The Transportation Cockpit can be found under the 'Planning' section.



To execute the planning 'planning profiles' need to be set up. For Troops there are currently several different profiles. Depending on the roles assigned the following profiles could be set up.

- **LTC** – for EXW movements that are carried out under the Long-Term Charter contract. The Freight Units for LTC shipments get automatically planned by TM.
- **Troops LOA/DAP** – for DAP air movements where the TCC/PCCs plan the transport and the UN tracks the shipments. The Freight Units for DAP shipments get automatically planned by TM.
- **Troops Non-LOA/EXW** - for EXW air shipments where the UN plans the transport. The transportation planner needs to choose the route for the movement. This profile is also used for intra/inter mission movements with EXW Incoterm (receiving mission plans the transport).
- **Troops LOA/DAP Land/Sea** – for DAP land/sea movements where the TCC/PCCs plan the transport and the UN tracks the shipments. The Freight Units for DAP shipments get automatically planned by TM.
- **Troops Non-LOA/EXW Land/Sea** - for EXW land/sea shipments where the UN plans the transport. The transportation planner needs to choose the route for the movement. This profile is also used for intra/inter mission land/sea movements with EXW Incoterm (receiving mission plans the transport).
- **Troops Intra DAP Air** - for DAP intra-mission shipments. Intra mission movements should always be created with DAP Incoterm. The transportation planner needs to choose the route for the movement.
- **Troops Inter DAP Air** - for DAP inter-mission shipments where the sending mission plans the transport. The transportation planner needs to choose the route for the movement.
- **Troops Intra DAP Land/Sea** - for DAP intra-mission land/sea shipments. Intra mission movements should always be created with DAP Incoterm. The transportation planner needs to choose the route for the movement.

- **Troops Inter DAP Land/Sea-** for DAP inter-mission land/sea shipments where the sending mission plans the transport. The transportation planner needs to choose the route for the movement.

**Profile and Layout Sets (3)**

Save New Copy Refresh Unplanned Requirements Refresh Job Status

Description	N Freight Unit Selection Profile	T Freight Order Selection Profile	F C I S S S	Planning Profile	Transportation Cockpit Layout
LTC	ZSEL_FU_WIDE_BODY_LTC_NONLOA	ZSEL_FO_WIDE_BODY_LTC_NONLOA		ZPLN_WIDE_BODY_LTC	UN Map Li
Troops LOA/DAP	ZSEL_FU_COE_TROOPS_MEM_CTY_DLVD_L	ZSEL_FO_COE_TROOPS_LOA		ZPLN_COE_TROOPS_MEMBER_COUNTRY_DEI	UN Map Li
Troops Non-LOA/EXW	ZSEL_FU_COE_TROOPS_NONLOA	ZSEL_FO_COE_TROOPS_NONLOA		ZPLN_COE_TROOPS	UN Map Li

Troops Land/Sea planning profile set up:

Description	Freight Unit Selection Profile	Freight Order Selection Profile	Planning Profile
Troops LOA/DAP Land/Sea	ZSEL_FU_COE_TROOPS_MEM_CTY_DLVD_L	ZSEL_FO_COE_TROOPS_LOA	ZPLN_TROOPS_LAND_SEA_MEMBER_COUNTRY_D
Troops non-LOA/EXW Land/Sea	ZSEL_FU_COE_TROOPS_NONLOA	ZSEL_FO_COE_TROOPS_NONLOA	ZPLN_TROOPS_LAND_SEA

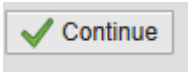
Intra/Inter mission planning profile set up:

Description	Freight Unit Selection Profile	Freight Order Selection Profile	Planning Profile	Transportation Cockpit Layout
Inter DAP Air Troops	ZSEL_FU_COE_TROOPS_INTER_MISSION_LOA	ZSEL_FO_COE_TROOPS_NONLOA	ZPLN_COE_TROOPS	UN Map Layout
Inter DAP Land/Sea Troops	ZSEL_FU_COE_TROOPS_INTER_MISSION_LOA	ZSEL_FO_COE_TROOPS_NONLOA	ZPLN_TROOPS_LAND_SEA	UN Map Layout
Inter/Intra EXW Air Troops	ZSEL_FU_COE_TROOPS_NONLOA	ZSEL_FO_COE_TROOPS_NONLOA	ZPLN_COE_TROOPS	UN Map Layout
Inter/Intra EXW Land/Sea Troops	ZSEL_FU_COE_TROOPS_NONLOA	ZSEL_FO_COE_TROOPS_NONLOA	ZPLN_TROOPS_LAND_SEA	UN Map Layout
Intra DAP Air Troops	ZSEL_FU_COE_TROOPS_INTRA_MISSION_LOA	ZSEL_FO_COE_TROOPS_NONLOA	ZPLN_COE_TROOPS	UN Map Layout
Intra DAP Land/Sea Troops	ZSEL_FU_COE_TROOPS_INTRA_MISSION_LOA	ZSEL_FO_COE_TROOPS_NONLOA	ZPLN_TROOPS_LAND_SEA	UN Map Layout

Please note: It is very important to set the planning profiles up with the correct selections for the 'Freight Unit Selection Profile', 'Freight Order Selection Profile', and 'Planning Profile' as otherwise the Freight Order types could be wrong, which could lead to wrong reporting. The planning profiles must be set up once by each user with the first usage of the cockpit (with values seen on screenshot) and saved.

To create a new profile, press . After settings are entered press save .

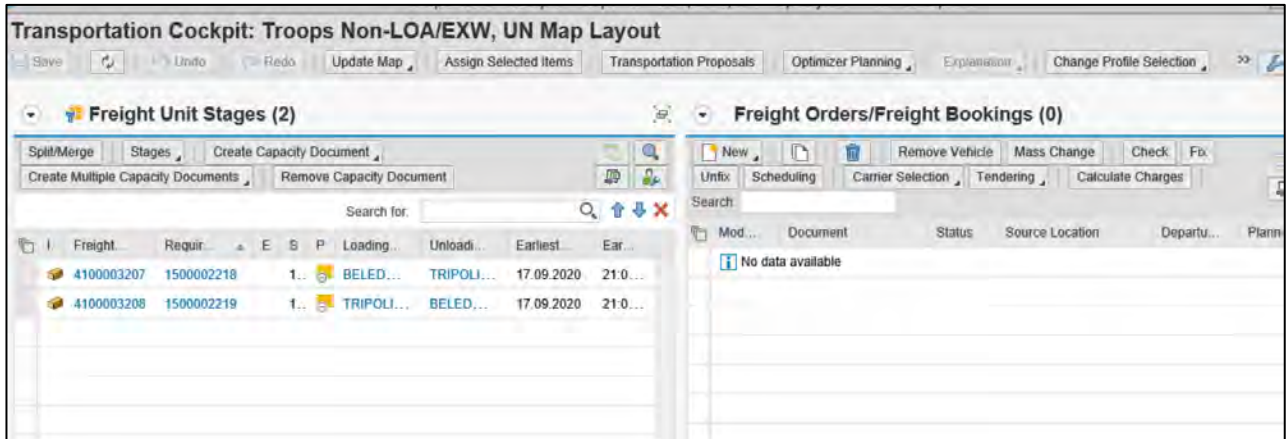
Although for LOA movements the system plans the FO(s) automatically, the Troops LOA/DAP profile entries should be checked from time to time to make sure that no Freight Units stay unplanned. This could happen when no FO could be created as for example Master Data are missing.

After choosing the right planning profile click continue .

For EXW shipments choose the 'Troops Non-LOA/EXW':

All Freight Units that have not been planned yet are displayed on the left side of the cockpit.



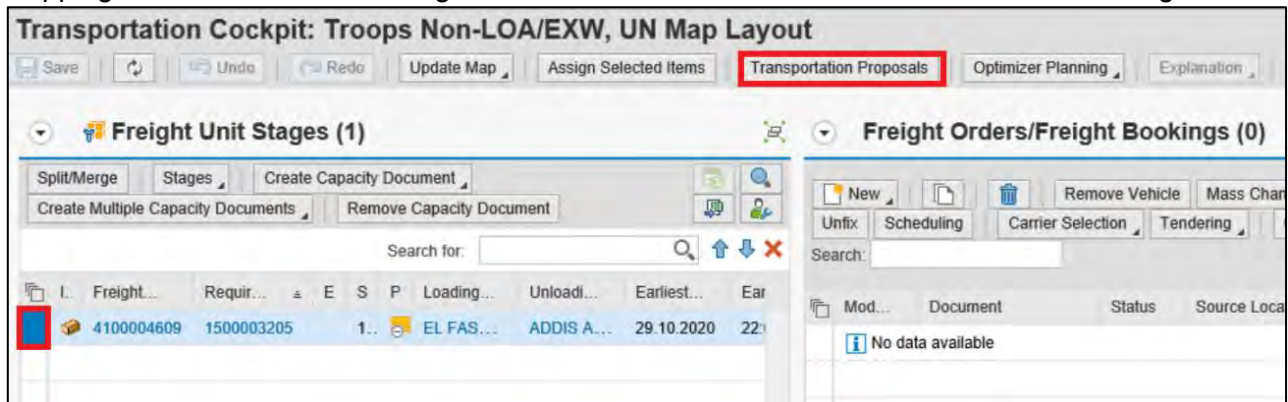


Look for your Freight Unit(s) to be planned. Each line needs to be planned separately except for consolidation cases.

### Route Selection / Freight Order (FO) creation

Mark the line of the Freight Unit that should be planned and go to 'Transportation Proposals' on the upper part of the screen.

Please note, if you mark two or more FUs the system tries to consolidate those, hence only FUs shipping from the same origin to same destination should be marked together.



Depending on how many possible connections (lanes/routes) are available the system gives a maximum of 20 proposals. In case there is only one route it gets selected automatically. If an 'Optimizer Run' error occurs, it is most likely due to missing master data.

**Transportation Proposals: Standard Layout**

Accept Route
  Cancel
  Accept Planning

Transportation Proposals

Define Filter

Document Hierarchy	Selected	P	M	Means of Transport	Source Location	Destination Location	Loading St...
Transportation Proposal 20	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	EL FASHER_AIRPORT	ADDIS ABABA_AIRPORT	30.10.2020...
Stage 4100004609/1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	EL FASHER_AIRPORT	ADDIS ABABA_AIRPORT	30.10.2020...
Transportation Proposal 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	EL FASHER_AIRPORT	ADDIS ABABA_AIRPORT	29.10.2020...
Stage 4100004609/1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	EL FASHER_AIRPORT	EL GENEINA_AIRPORT	29.10.2020...
Stage 4100004609/2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	EL GENEINA_AIRPORT	ADDIS ABABA_AIRPORT	29.11.2020...
Transportation Proposal 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	EL FASHER_AIRPORT	ADDIS ABABA_AIRPORT	29.10.2020...
Stage 4100004609/1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	EL FASHER_AIRPORT	EL DAEIN_AIRPORT	29.10.2020...
Stage 4100004609/2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	EL DAEIN_AIRPORT	ADDIS ABABA_AIRPORT	29.11.2020...
Transportation Proposal 3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	EL FASHER_AIRPORT	ADDIS ABABA_AIRPORT	29.10.2020...
Stage 4100004609/1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	EL FASHER_AIRPORT	NYALA_AIRPORT	29.10.2020...
Stage 4100004609/2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	NYALA_AIRPORT	ADDIS ABABA_AIRPORT	29.11.2020...
Transportation Proposal 4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	EL FASHER_AIRPORT	ADDIS ABABA_AIRPORT	29.10.2020...
Stage 4100004609/1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	EL FASHER_AIRPORT	KHARTOUM_AIRPORT	29.10.2020...
Stage 4100004609/2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	KHARTOUM_AIRPORT	ADDIS ABABA_AIRPORT	29.11.2020...

The “Means of Transport” shows which leg is transported by truck, vessel or plane. Freight Orders are proposed by means of transport and depending on the existing TM transportation network. Select the appropriate route by marking ‘Selected’



**Transportation Proposals: Standard Layout**

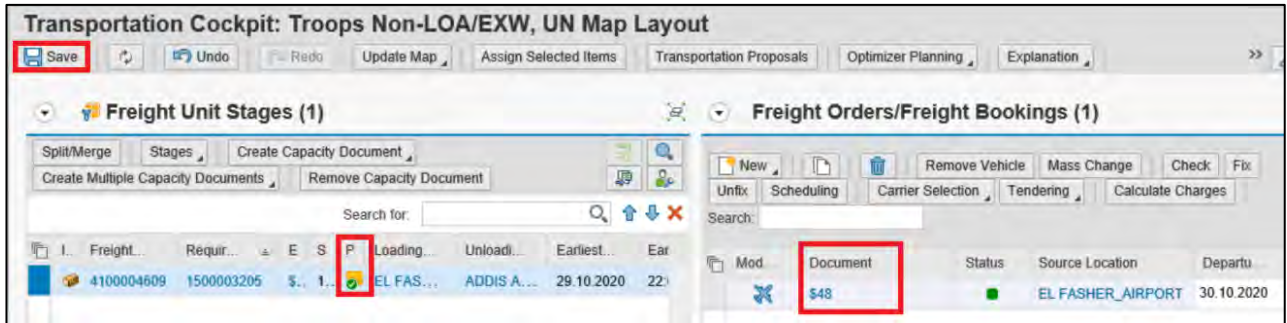
Accept Route
  Cancel
  Accept Planning

Transportation Proposals

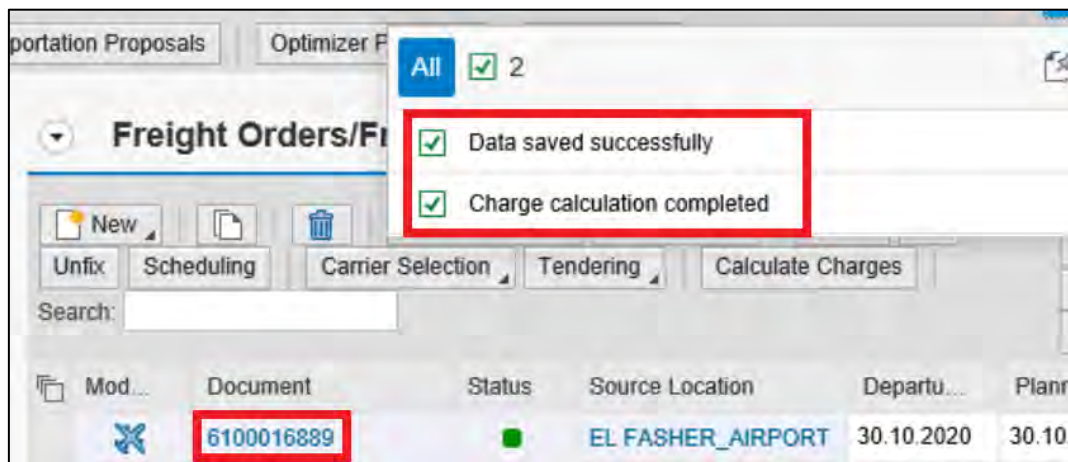
Define Filter

Document Hierarchy	Selected	P	M	Means of Transport	Source Location	Destination Location	Loading St...
Transportation Proposal 20	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	EL FASHER_AIRPORT	ADDIS ABABA_AIRPORT	30.10.2020...
Stage 4100004609/1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	EL FASHER_AIRPORT	ADDIS ABABA_AIRPORT	30.10.2020...
Transportation Proposal 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	EL FASHER_AIRPORT	ADDIS ABABA_AIRPORT	29.10.2020...
Stage 4100004609/1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	EL FASHER_AIRPORT	EL GENEINA_AIRPORT	29.10.2020...
Stage 4100004609/2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TROOPS_AIR	EL GENEINA_AIRPORT	ADDIS ABABA_AIRPORT	29.11.2020...

Press ‘Accept Planning’ and the Freight Order(s) get proposed based on the chosen route.



The FU shows now on the left with 'green check mark' which means that it is planned. On the right side the Freight Order (FO) can be seen. The number shows as '\$' until 'Save' on the top left is pressed. After saving the system gives a FO number starting with '61...'.



The FO is the document where among other data the estimated/actual charges and the SOW are stored. Furthermore, attachments can be added. Click on the Document '61..' number to get redirected to the FO document. Please note that currently no estimated rates for troop flights are captured in TM as the cost is very volatile.

## Charge Calculation

On the FO 'Charges' tab the estimated and actual charges are shown by type of flight, baggage and passenger number. If an estimated rate for that route exists in the TM charges table, the rate will show automatically in the 'Rate Amount' column. In the below case no rate is available, and therefore the rate amount is empty. Please note that currently no estimated rates for flights are captured in TM as the cost is very volatile.

Display Troops UN Planned Frt Order(Non-LOA) 6100016889

Save Cancel **Edit** Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting Create Service Order Schedule Set Status Load Plan Status Execution Status File

General Data Business Partner Items Stages Utilization Subcontracting Document Flow **Charges** Execution Notes Attachments Statuses

Invoicing Status: 01 Not Invoiced Calculation Date: 27.10.2020  
 Charge Calc. Status: 02 Calculated Manually-Changed Calc. Date:  
 Total Amount in Local Currency: 0.00 USD Exchange Rate Date: 27.10.2020  
 Total Amount in Document Currency: 0.00 USD Manually-Changed Exchange Rate Date:  
 Rounded Total Amount in Document Currency: 0.00 USD  
 Rounded Amount Difference in Document Currency: 0.00 USD  
 Late Charges:

Charge Items Charge Analysis Log

Insert Views Show/Hide Details Multiple Rates Show/Hide Access Sequence Panel/Changed

Charge Hierarchy	Late Changes	C...	Charg...	Charge...	Com...	C...	Logistical Reference	Rate Amo...	R...	M...	Ignore	P...	U...	Quantity	Calculation Base
Sum							Sum								
Dummy Carrier / New Yo...															
Package 60															
Estimate Charge			ESTIMATE	Estimate Chai			10 - TROOPS	USD					1 EA	800	QUANTITY_VAL
Estimate Charge			ESTIMATE	Estimate Chai			20 - OUTBOUND_FLIGHT	USD					1 EA	4	QUANTITY_VAL
Estimate Charge			ESTIMATE	Estimate Chai			30 - DEPOSITIONING_FLIGHT	USD					1 EA	1	QUANTITY_VAL
Estimate Charge			ESTIMATE	Estimate Chai			40 - CABINBAGGAGE	USD					1 EA	800	QUANTITY_VAL
Estimate Charge			ESTIMATE	Estimate Chai			50 - CARGOBAGGAGE	USD					1 EA	3.200	QUANTITY_VAL
Actual Charge			ACTUAL C	Actual Charge			10 - TROOPS	USD					1 EA	800	QUANTITY_VAL
Actual Charge			ACTUAL C	Actual Charge			20 - OUTBOUND_FLIGHT	USD					1 EA	4	QUANTITY_VAL
Actual Charge			ACTUAL C	Actual Charge			30 - DEPOSITIONING_FLIGHT	USD					1 EA	1	QUANTITY_VAL
Actual Charge			ACTUAL C	Actual Charge			40 - CABINBAGGAGE	USD					1 EA	800	QUANTITY_VAL
Actual Charge			ACTUAL C	Actual Charge			50 - CARGOBAGGAGE	USD					1 EA	3.200	QUANTITY_VAL
Custom Clearance C...			CUST. CLF	Custom Clear				USD							

The transportation planner should enter 'estimated charges' for the movement. For troops flights the cost should be estimated by flight. As per above example there are four outbound flights. If the different charges and items are not displayed, please click on the 'triangle' next to the package.

Charge Items Charge Analysis Log

Insert Views Show/Hide Details Multiple Rates Show/Hide Access Sequence Panel/Changed

Charge Hierarchy	Late Changes	C...	Charg...	Charge...	Com...
Sum					Sum
Dummy Carrier / New Yo...					
Package 60					

The charges need to be checked/entered for each FO of a movement. The estimated charge will show on the SOW. To add charges, click on the 'edit' button on the top left.

**Edit Troops UN Planned Frt Order(Non-LOA) 6100016889**

Save Cancel Edit Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting Create Service Order Schedule Set Status

General Data Business Partner Items Stages Utilization Subcontracting Document Flow **Charges** Execution

Invoicing Status: 01 Not Invoiced Calculation Date: 27.10.2020 15:30:30  
 Charge Calc. Status: 02 Calculated Manually-Changed Calc. Date:  
 Total Amount in Local Currency: 200,000.00 USD Exchange Rate Date: 27.10.2020  
 Total Amount in Document Currency: 200,000.00 USD Manually-Changed Exchange Rate:  
 Rounded Total Amount in Documen...: 200,000.00 USD  
 Rounded Amount Difference in Doc...: 0.00 USD  
 Late Changes:

Charge Items Charge Analysis Log

Insert Views Show/Hide Details Multiple Rates Show/Hide Access Sequence Reset Charges

Charge Hierarchy	C...	Logistical Reference	Rate Amo...	R... Curre	M Ra	Ignore Calculati An Rule	P... Unit	U...	Quantity	Calculation Base	Calculated A...
Sum											
Dummy Carrier / New Yo...											
Package 60											
Estimate Charge		10 - TROOPS		USD			1 EA	800		QUANTITY_VAL	
Estimate Charge		20 - OUTBOUND_FLIGHT	50,000.00	USD			1 EA	4		QUANTITY_VAL	200,000.00
Estimate Charge		30 - DEPOSITIONING_FLIGHT		USD			1 EA	1		QUANTITY_VAL	
Estimate Charge		40 - CABINBAGGAGE		USD			1 EA	800		QUANTITY_VAL	
Estimate Charge		50 - CARGOBAGGAGE		USD			1 EA	3,200		QUANTITY_VAL	

Enter the estimated charges per flight in the “Rate Amount” column for the inbound or outbound flight line and press enter. The system calculates the total amount, which is displayed in the upper left of the document. In above case there are four outbound flights at cost of 50,000 \$. If a positioning flight is expected, the cost should also be estimated. Save. The different cargo and flight types originate from the FWO upload file.

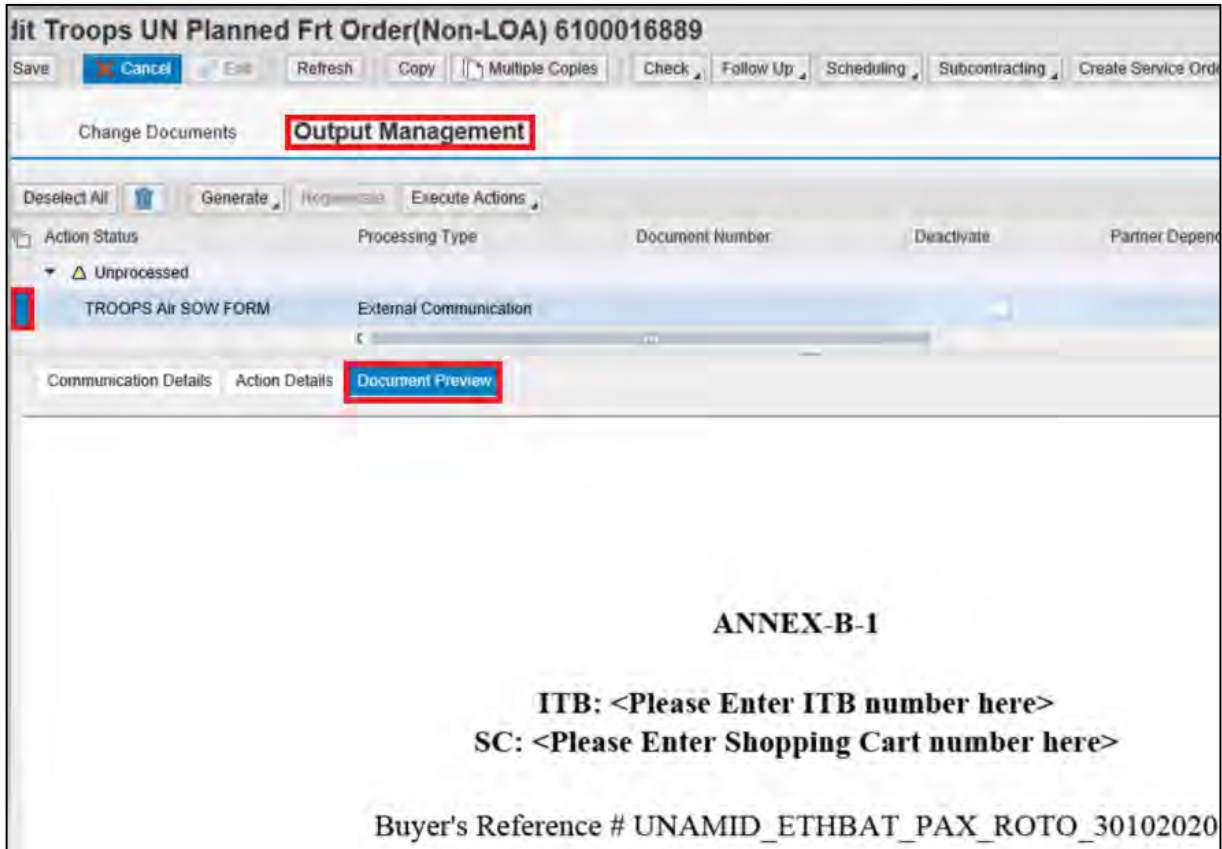
## SOW Generation & Download

The SOW form is displayed on the FO ‘Output Management’ tab.



If the ‘Output Management’ tab is not visible click on the icon on the right. After clicking the icon all available tabs are displayed, then choose ‘Output Management’.

Mark the ‘Troops Air SOW Form’ line. Then press the ‘Document Preview’.



The SOW is in pdf format and can be amended after it was downloaded. When hovering over the top of the document the 'save' and 'print' options are displayed.

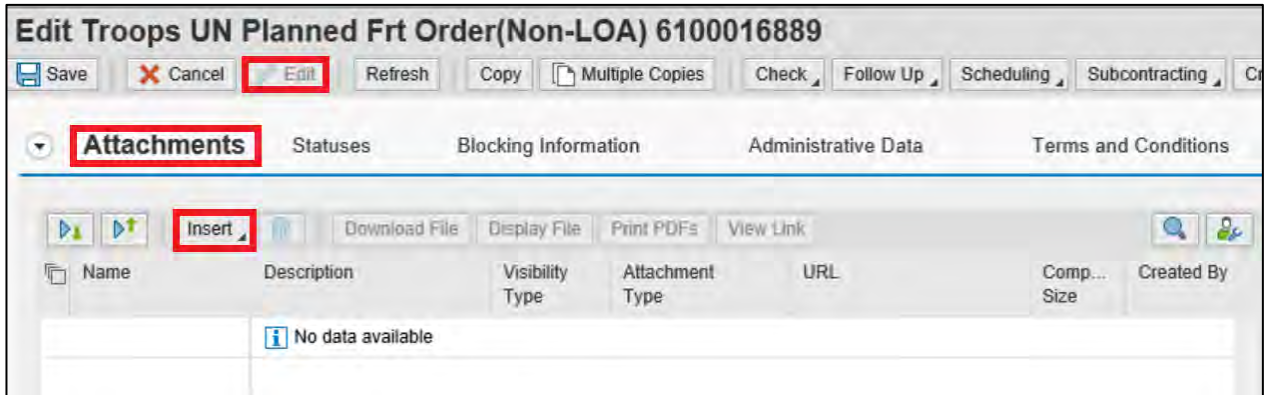


To amend the SOW, it needs to be downloaded. It is suggested to open it in Word directly for editing and not through pdf converter. Adjust the SOW as needed to fit the specific requirements for the movement request.

After finalizing the SOW, the Freight Shopping Cart needs to be created in SRM. The SOW must be attached to the shopping cart. Please do not create Freight Shopping Carts with \$1 value but with estimated freight cost.

The final SOW also needs to be uploaded in TM. To do this, go to the 'Attachments' tab of the Freight Order.

Switch to 'Edit' mode. Then click on 'Insert'.



Choose 'File' to upload the SOW.

Enter a description for your file and click 'Next'.

Browse for your file and then click ok. If the file is stored on SharePoint, please refer to section Upload documents from SharePoint to TM of this document.

Attachments						Statuses	Administrative Data	Terms and Conditions	Document Reference		
<div style="display: flex; justify-content: space-between;"> <span>Download File</span> <span>Display File</span> <span>Print PDFs</span> <span>View Link</span> </div>											
Name	Description	Visibility Type	Attachment Type	URL	Com Size						
	SOW	Internal	Attachment		82.7						

The attachment will show on the attachment tab. Press 'Save'. As default the attachment will show as internal, this means the freight forwarder cannot see the attachment. Attachments that should be seen by external parties, would need to be switched to 'external' for the visibility type.

PD/procurement/responsible colleagues need to be informed about the requirements. After the bidding process was finalized, PD/procurement/responsible colleagues are required to update the TM Freight Order with the awarded carrier, SRM Freight PO number, date and location/route correction (if applicable). PD/procurement/responsible colleagues will also update the actual cost for this move for each FO. The carrier is shown on the 'General Data' tab and the SRM Freight PO on the 'Document References' tab.

### Change of Forwarding Order (FWO) in TM

In case the Forwarding Order needs to be changed, first click on the edit mode. If changes to quantity, weight, volume happen after FWO upload, they can be changed on the FWO directly and will update on the Freight Order (if available) automatically. Changes to Source and Destination location cannot be updated and a new FWO would need to be uploaded and the incorrect one needs to be deleted.

Edit Forwarding Order for COE Troops 1500003205											
<div style="display: flex; justify-content: space-between;"> <span>Save</span> <span>Cancel</span> <span style="border: 1px solid red;">Edit</span> <span>Copy</span> <span>Other Copy Options</span> <span>Refresh</span> <span>Follow Up</span> <span>Check</span> <span>Confirm</span> <span>Cancel Document</span> </div>											
Items											
<div style="display: flex; justify-content: space-between;"> <span>Split</span> <span>Open Transit</span> <span>Copy Actual Data</span> </div>											
Item Hierarchy	Product	Quantity	Qu. Unit of Measur	Gross Weight	Gross Weight UoM	Gross Volume	Gross Volume UoM	Net Weight	Net Weight UoM	Tare Weight	Tare Weight UoM
Flights		4	EA	80,000	KG	480	M3	80,000	KG		
Passengers	TROOPS	800	EA		KG		M3				
Passengers	OUTBOUND_FLIGHT	4	EA		KG		M3				
Passengers	DEPOSITIONING_FLIGHT	1	EA		KG		M3				
Cabin Baggage (m3)	CABINBAGGAGE	800	EA	6,400	KG	80	M3				
Cargo Baggage (m3)	CARGOBAGGAGE	3,200	EA	73,600	KG	400	M3				

In 'Edit' mode the passenger number and baggage data can be changed.



**Edit Forwarding Order for COE Troops 150003205**

Save Cancel Edit Copy Other Copy Options Refresh Follow Up Check Confirm

All 1

Item ID 50 references freight order 6100016889

Items

Insert Split Open Transit Copy Actual Data

Item Hierarchy	Product	Quantity	Qu Unit of Measur	Gross Weight	Gross Weight UoM	Gross Volume	Gross Volume UoM	Net Weight	Net Weight UoM	Tare Weight	Tare Weight UoM
Flights		2	EA	40,000	KG	240	M3	40,000	KG		
Passengers	TROOPS	400	EA		KG		M3				
Passengers	OUTBOUND_FLIGHT	2	EA		KG		M3				
Passengers	DEPOSITIONING_FLIGHT	1	EA		KG		M3				
Cabin Baggage (m3)	CABINBAGGAGE	400	EA	3,200	KG	40	M3				
Cargo Baggage (m3)	CARGOBAGGAGE	1,600	EA	36,800	KG	200	M3				

After changing the data, press 'enter'. A warning is given as Freight Orders exist already. Save.

To go back in 'Display' mode, click 'Cancel'.

**Display Forwarding Order for COE Troops 150003205**

Save Cancel Edit Copy Other Copy Options Refresh Follow Up

The Freight Order(s) if any were updated automatically.

**Display Troops UN Planned Frt Order(Non-LOA) 6100016889**

Save Cancel Edit Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting Create Service Order

General Data Business Partner **Items** Stages Utilization Subcontracting Document Flow Charge

All Items

Change Hierarchy: All Items Insert (Choose Item Type) Insert Create Service Order Adjust Subitems

Forwarding Order

Item Hierarchy	Item Type	Item Type (Description)	Qua...	Qua... UoM	Gross Weight	Gross Weight UoM	Gross Volume	Gross Volume UoM
Active Vehicle TROOPS_AIR	TRUC	Truck	2	EA	40,000	KG	240	M3
Forwarding Order for COE Troops 150003205			2	EA	40,000	KG	240	M3
COE Non-LOA Troops 4100004609			2	EA	40,000	KG	240	M3
Package 60	PACK	Package	2	EA	40,000	KG	240	M3
Product 10 TROOPS	PRD	Product	400	EA		KG		M3
Product 20 OUTBOUND_FLIGHT	PRD	Product	2	EA		KG		M3
Product 30 DEPOSITIONING_FLIGHT	PRD	Product	1	EA		KG		M3
Product 40 CABINBAGGAGE	PRD	Product	400	EA	3,200	KG	40	M3
Product 50 CARGOBAGGAGE	PRD	Product	1,600	EA	36,800	KG	200	M3

## Deletion of Forwarding Order (FWO) in TM

Please note, that existing Freight Orders for the Forwarding Order need to be deleted separately. They will not get deleted automatically when the Forwarding Order is cancelled. The Freight

Order(s) should be deleted before the FWO is cancelled. Freight Orders that are already in status 'execution' cannot be deleted anymore as the shipment has departed already.

In case the Forwarding Order needs to be deleted, first click on 'Edit' mode.

Document Hierarchy	Business Document Type (Des...)	Business Document	Business Do
Forwarding Order for COE Troops 1500003203	Forwarding Order for COE Tro...	1500003203	Planned
Successor Business Documents			
COE LOA Troops 4100004607	COE LOA Troops	4100004607	In Process

Click 'Cancel Document'.

**Cancel Document**

⚠ Setting the status to "Canceled" cannot be reverted.  
Continue anyway?

Reason for Cancellation:

**OK** Cancel

Confirm with 'OK'.

Block Category	Block Reason
No data available	

The Life Cycle Status shows now as canceled.

## Freight Unit (FU) in TM

A **Freight Unit (FU)** represents a set of goods that are transported together across the entire transportation chain (*smallest unit that can be transported*). The Freight Unit (FU) has a 1:1 relationship with the FWO and is the base document for planning in TM.

The “General Data” tab displays data copied from the FWO and shows under “Organizational Data” which group/unit is responsible for movement planning and which for freight buying.

**General Information**

Description: MONUSCO\_AUTTAU\_PAX\_DEPLOY\_22122020  
 Freight Unit Type: ZFU5 COE Non-LOA Troops  
 Shipping Type: 10 Loose  
 Movement Type: ZDE Deployment  
 Incoterm: EXW Ex Works

**Transportation**

Total Distance: [ ] KM  
 Gross Duration/Total Net Duration: 71:59

**Organizational Data**

Purchasing Organization: PO\_1000 United Nations Purchasing Org  
 Purchasing Group: PG\_S01 PD Aviation Team  
 Planning and Execution Organization: PE\_1000 United Nations Planning & Execution Org  
 Org. Unit Group: PE\_PS01 Planning & Execution Aviation

**Source**

Location: VIENNA\_AIRPORT Vienna International Airport  
 Vienna

**Destination**

Location: GOMA\_AIRPORT Goma International Airport  
 Goma

The “Document Flow” tab shows predecessor documents such as FWO and successor documents such as Freight Order(s) (if available yet).

Document Hierarchy	Business Document Type (Des...)	Business Document	Business Document Life Cycle...	Created By	Created On Date/Time
COE Non-LOA Troops 4100004954	COE Non-LOA Troops	4100004954	New	01PLTROOPS01	03.12.2020 18:05:05 UTC
Predecessor Business Documents					
Forwarding Order for COE Troops 1500003423	Forwarding Order for COE Tro...	1500003423	In Planning	01PLTROOPS01	03.12.2020 18:05:05 UTC

The FU “Stages” tab shows only one stage before the planning of EXW and DAP movements. The “Stage Status” is “Not Planned” and the “Document” field is empty.

Stage Description	Stage Status	Document	Transportation Mode	Source Location	IATA Code (Source)	City (Source)	Requested Pick-Up Date	Destination Location	IATA Code (Destination)	City (Destination)	Requested Delivery Date
Stage 1	Not Planned		05 (Air)	VIENNA_AIRPORT	VIE	Vienna	21.12.2020	GOMA_AIRPORT	GOM	Goma	24.12.2020

After planning, the FU stages will display stages according to the route and means of transport chosen. One stage equals one freight order. The FO number can be seen in the “Document” field.

Display COE Non-LOA Troops 4100004954

Save Cancel Edit Follow Up Check Direct Shipment Split/Merge Unassign Default Route Remove Unplanned Stages Fixing

Administrative Data Execution Customs Output Management **Stages** HBL or HAWB

Insert Merge Route Schedule Freight Document Set Of Status Determine Distance and Duration Change Incoterm Location Change Destination Location

Stage Description	Stage Status	Document	Transportation Mode	Source Location	IATA Code (Source)	City (Source)	Requested Pick-Up Date	Destination Location
Stage 1	Not Loaded	Troops UN Planned Frt Order(Non-LOA) 6100017337	05 (Air)	VIENNA_AIRPORT	VIE	Vienna	21.12.2020	GOMA_AIRPORT

### Deletion of Freight Unit

Sometimes it is necessary to delete the FU(s) in TM. In cases where a re-planning needs to be done, besides the existing Freight Order(s) if any, the FU needs to be deleted as otherwise the re-planning can only be done with the same routes. This might not be critical for Troops Air movements as usually the direct route is chosen, hence there would be only one stage/FO, but for cases with more than one FO where a re-planning of the movement is needed the original FU should be deleted.

The “Stages” tab shows after planning different stages and the respective Freight Order(s).

Display COE Non-LOA Troops 4100004954

Save Cancel Edit Follow Up Check Direct Shipment Split/Merge Unassign Default Route Remove Unplanned Stages Fixing

Administrative Data Execution Customs Output Management **Stages** HBL or HAWB

Insert Merge Route Schedule Freight Document Set Of Status Determine Distance and Duration Change Incoterm Location Change Destination Location

Stage Description	Stage Status	Document	Transportation Mode	Source Location	IATA Code (Source)	City (Source)	Requested Pick-Up Date	Destination Location
Stage 1	Not Loaded	Troops UN Planned Frt Order(Non-LOA) 6100017337	05 (Air)	VIENNA_AIRPORT	VIE	Vienna	21.12.2020	GOMA_AIRPORT

After deleting the FOs, the document field is empty on the FU “Stages” tab. To delete the FU, click “Edit” on the upper left.

Display COE Non-LOA Troops 4100004954

Save Cancel **Edit** Follow Up Check Direct Shipment Split/Merge Unassign Default Route Remove Unplanned Stages Fixing

Administrative Data Execution Customs Output Management **Stages** HBL or HAWB

Insert Merge Route Schedule Freight Document Set Of Status Determine Distance and Duration Change Incoterm Location Change Destination Location

Stage Description	Stage Status	Document	Transportation Mode	Source Location	IATA Code (Source)	City (Source)	Requested Pick-Up Date	Destination Location	IATA Code (Destination)	City (Destination)	Requested Delivery Date
Stage 1	Not Planned		05 (Air)	VIENNA_AIRPORT	VIE	Vienna	21.12.2020	GOMA_AIRPORT	GOM	Goma	24.12.2020

Click on the ‘arrows’  on the upper right. Choose “Cancel Document”.

Edit COE Non-LOA Troops 4100004954

Save Cancel Edit Follow Up Check Direct Shipment Split/Merge Unassign Default Route Remove Unplanned Stages Fixing

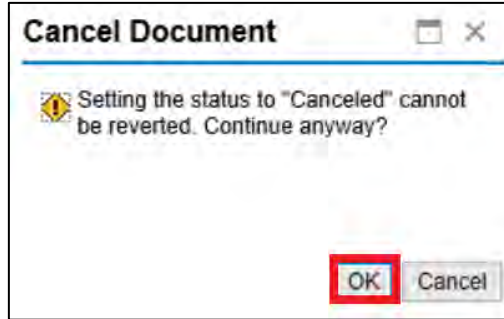
Administrative Data Execution Customs Output Management **Stages** HBL or HAWB

Insert Merge Route Schedule Freight Document Set Of Status Determine Distance and Duration Change Incoterm Location Change Destination Location

Stage Description	Stage Status	Document	Transportation Mode	Source Location	IATA Code (Source)	City (Source)	Requested Pick-Up Date	Destination Location	IATA Code (Destination)	City (Destination)	Requested Delivery Date
Stage 1	Not Planned		05 (Air)	VIENNA_AIRPORT	VIE	Vienna	21.12.2020	GOMA_AIRPORT	GOM	Goma	24.12.2020

Cancel Document

Confirm with “OK”. The FU is now deleted. The system will generate a new FU automatically.



The newly created FU has only one unplanned stage. New planning can now be executed.

Display COE Non-LOA Troops 4100004964

Save Cancel Edit Follow Up Check Direct Shipment Split/Merge Unassign Default Route Remove Unplanned Stage Fixing

Administrative Data Execution Customs Output Management **Stages** HBL or HAWB

Insert Merge Route Schedule Freight Document Set OI Status Determine Distance and Duration Change Interim Location Change Destination Location

Stage Description	Stage Type	Stage Status	Document	Transportation Mode	Source Location	IATA Code (Source)	City (Source)	Requested Pick-Up Date	Destination Location
Stage 1	03 (Main Carriage)	Not Planned		05 (Air)	VIENNA_AIRPORT	VIE	Vienna	21.12.2020	GOMA_AIRPORT

## Chapter 8. Management of Freight Orders

After the Freight Forwarder was awarded, the Freight Order(s) in TM need to be updated with the agreed data as per solicitation. Please note, that this update needs to be done as soon as possible and before the shipment starts. The assignment of the carrier allows the Freight Order(s) to be sent to the CCP. The Freight Forwarder will only then have access to his assigned FOs to submit events and documents.

Dates/Locations/Intermediate stops need to be adjusted in each Freight Order manually. For the carrier and SRM Freight PO assignment a mass update exists.

### Update Freight Order Dates/Locations/Intermediate Stops

After the Freight Forwarder was awarded, the Freight Orders in TM need to be updated with the agreed data as per solicitation. Dates/Locations/Intermediate stops need to be adjusted in each Freight Order manually.

#### Update Dates and Locations

In case the planned dates and locations in TM do not match with the solicitation/spot bidding results the correct dates and locations need to be reflected in TM. The dates and location updates reflect on the 'Execution' tab and impact the event dates the carriers are evaluated against. Please note that the origin and final destination cannot be changed, for UNOE and STO, these data come from ECC. If the Handover Location needs to be changed please follow the job aid:

[https://umoja.un.org/sites/umoja.un.org/files/umoja\\_job\\_aid\\_tm\\_fu\\_location\\_change\\_july\\_2020\\_0.pdf](https://umoja.un.org/sites/umoja.un.org/files/umoja_job_aid_tm_fu_location_change_july_2020_0.pdf)

Open the Freight Order and choose 'Edit' mode to adjust the FO. Go to the 'Stages' tab.

Stage	Source Location	S. Ad	Destination Location	E. Ad	D. Ad	Distance	Di. Unit of Measu	Net Duration	D. Fix	Planned Departure Date	Planned Departure Time	P. Tin	A. Da	A. Tin	A. De	Planned Arrival Date
1	MATADI_PORT	M.	SPCDA1	▲	M.	266.808	KM	3:20	~	25.09.2020	22:13:54	W.	00:00	W.		26.09.2020

Adjust the 'Planned Departure Date' and 'Planned Arrival Date' as according to FFW itinerary, then press "Save".

Stage	Source Location	S. Ad	Destination Location	E. Ad	D. Ad	Distance	Di. Unit of Measu	Net Duration	D. Fix	Planned Departure Date	Planned Departure Time	P. Tin	A. Da	A. Tin	A. De	Planned Arrival Date
1	MATADI_PORT	M.	SPCDA1	▲	M.	266.808	KM	3:20	~	01.11.2020	22:13:54	W.	00:00	W.		02.11.2020

Click 'Refresh' to verify that the dates were updated.

**Display UNOE Planned Frt Order (FF Deliv) 6100014850**

Save Cancel Edit Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting Create Service Order Schedule

General Data Business Partner Items **Stages** Utilization Subcontracting Document Flow Charges Exe

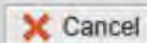
Insert Merge Set to Departed Determine Distance and Duration

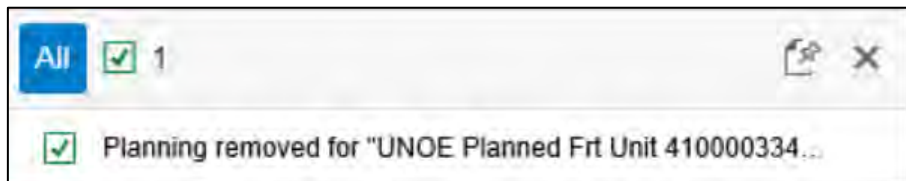
Stage	Source Location	S. Destination Ad Location	E. D. Ad	Distance	Di... Unit of Measu	Net Duration	D. Planned Departure Date	Planned Departure Time	P. A. De Tin	A. A. De Tin	A. A. De Tin	Planned Arrival Date
1	MATADI_PORT	M. SPCDA1	⚠ M.	266.808	KM	3.20	Not 01.11.2020	22:13:54	W	00:1	W	02.11.2020

Dates were updated.

This FO example is an on-carriage going from discharge port to final destination -> no location should be changed on the on-carriage.

If location changes on pre- or on-carriage are attempted the message 'Planning removed for ...'



appears. Please do NOT save the changes, but press cancel  to avoid planning removal. Confirm with 'Ok'.





Locations can only be updated on the main carriage, which is often the sea leg.

Open the Freight Order and choose 'Edit' mode to adjust the FO. Go to the 'Stages' tab.


**Edit UNOE Planned Frt Order (FF Deliv) 6100014948**

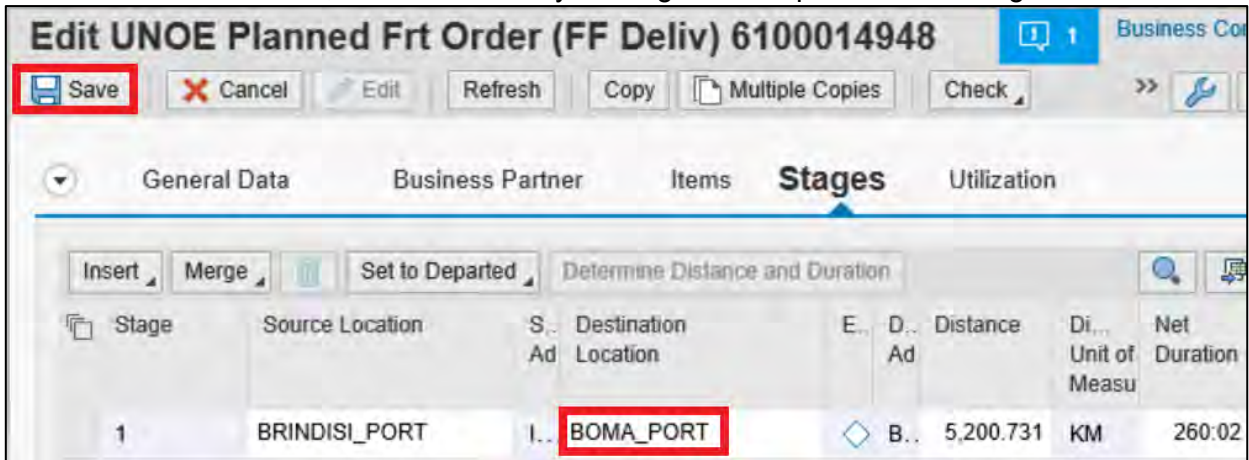
Save Cancel **Edit** Refresh Copy Multiple Copies Check >>  

General Data Business Partner Items **Stages** Utilization

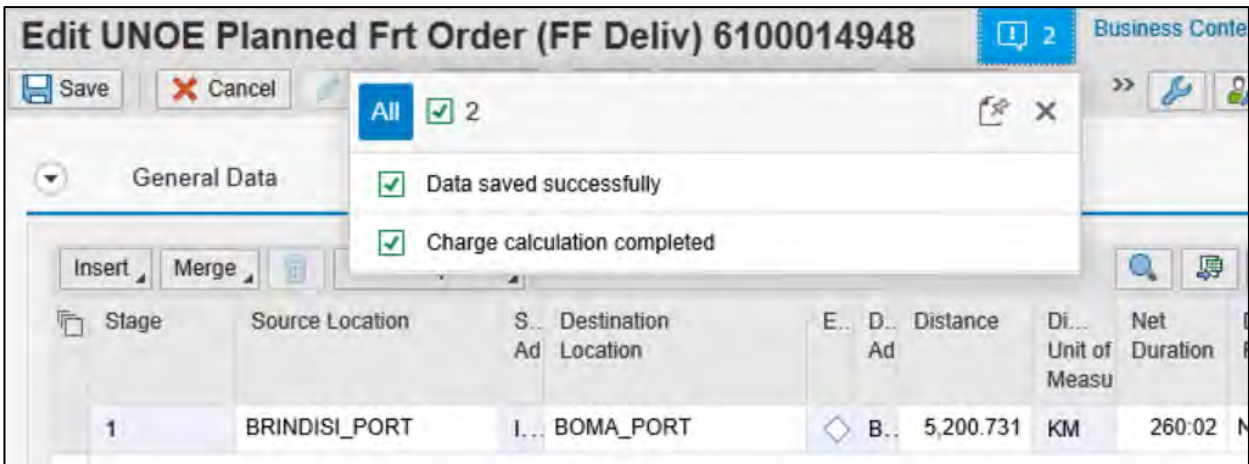
Insert Merge Set to Departed Determine Distance and Duration  

Stage	Source Location	S. Destination Ad Location	E. D. Ad	Distance	Di... Unit of Measu	Net Duration
1	<b>BRINDISI_PORT</b>	I. <b>MATADI_PORT</b>	◇ M.	5,192.923	KM	259:38

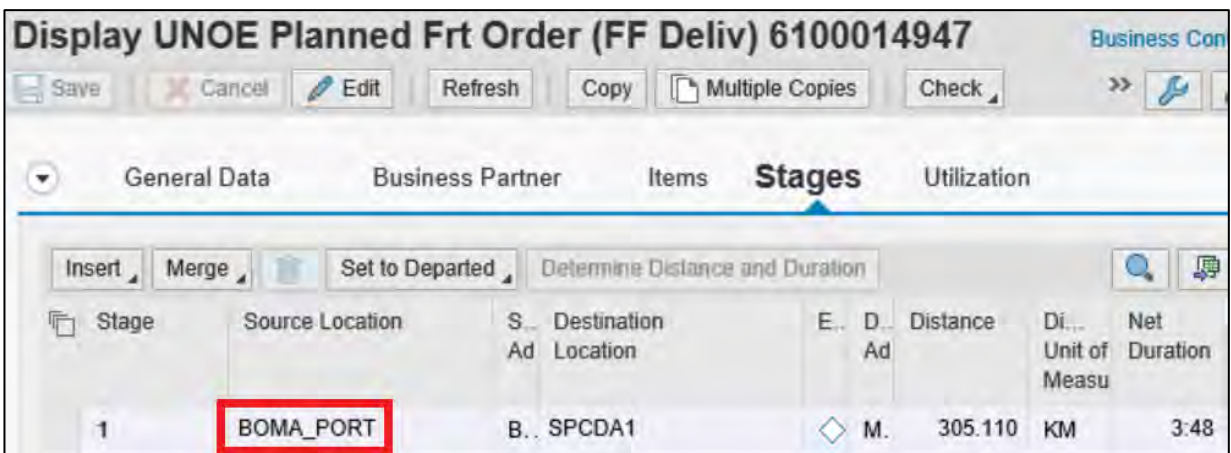
If the location to be updated is not the Handover location, update the location by either typing, if the TM location is known, or search for it by clicking on the squares  right to the location.



After updating, click 'Enter' and then 'Save' if no error message appears.



The on-carriage FO for the shipment will get updated automatically to BOMA\_PORT.





## Enter Intermediate Stop

In case the carrier intends to stop at an additional location the intermediate stop or transshipment point can and should be reflected in TM.

This update should be done along date/location updates (if applicable) and before the real carrier is assigned. FO Execution status = "Not started", this is the status of FOs with Dummy Carrier assignment. After the real carrier was assigned the status changes to "Ready for Transportation Execution" and the intermediate stop cannot be entered.

The screenshot shows the 'Statuses' tab with the following information:

- General**
  - Life Cycle Status: In Process
  - Fixing Status:
  - Archiving Status: Not Archived
- Subcontracting**
  - Subcontracting Status: Carrier Assigned
  - Confirmation Status: No Confirmation Yet
  - Invoicing Status: Not Invoiced
  - Dispute Case Status: No Dispute
- Planning**
  - Load Plan Status (Stop): BOMA\_PORT ( ) Not Planned
- Execution**
  - Execution Status: Not Started** (highlighted in red)
  - Logistical Execution Status: BOMA\_PORT Not Loaded
  - Manifest Status: Manifest Not Created

Open the Freight Order and choose 'Edit' mode to adjust the FO. Go to the 'Stages' tab.

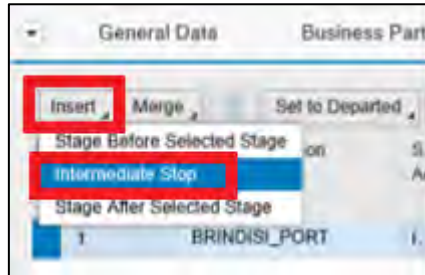
The screenshot shows the 'Edit UNOE Planned Frt Order (FF Deliv) 6100014948' window. The 'Edit' button and 'Stages' tab are highlighted in red. The table below shows the stage details:

Stage	Source Location	S... Ad	Destination Location	E... Ad	D... Ad	Distance	Di... Unit of Measu	Net Duration
1	BRINDISI_PORT	I...	BOMA_PORT	◇	B..	5,200.731	KM	260:02

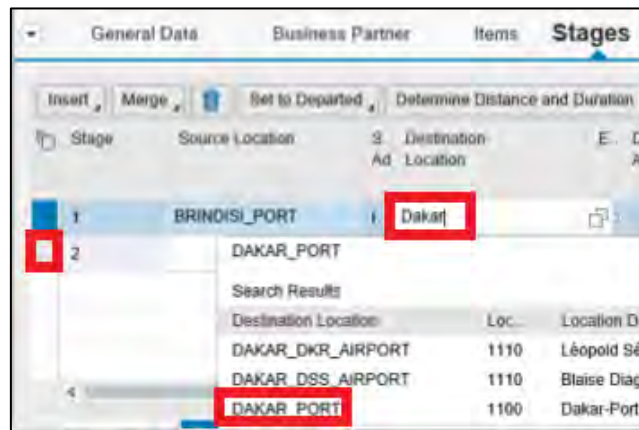
Mark the line of stage 1. If the line is not marked, no stop can be entered.

The close-up screenshot shows the first row of the stage table highlighted in blue. A red box highlights the '1' in the Stage column.

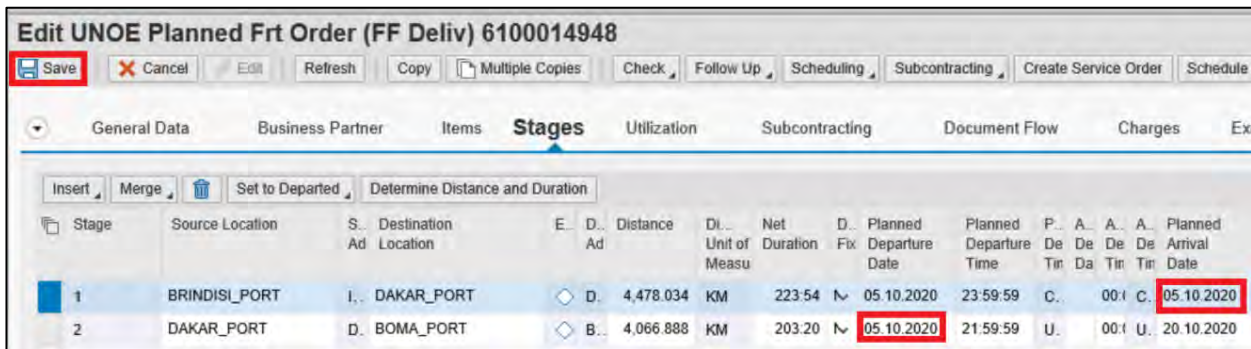
Click on 'Insert' on the upper left side and choose 'intermediate stop'.



A second stage/line appears. Enter the intermediate stop location/port in the "Destination Location" of the first line. Upon typing the system will show available locations. Choose the correct one and afterwards press "Enter".



The "Source Location" of the second FO stage will be automatically filled with the same location. Adjust the 'Planned Arrival Date' & 'Planned Departure Date' for the new stop as needed.



When done, press "Save" on the upper left and click on "Refresh".

The 'Execution' tab shows now additional Arrival & Departure events for the newly entered stop.

Event	Planned Date	Actual Event Date	Actual Event Time	Time Zone	Location	Description
Handover Document	05.10.2020 21:59:59 CET		00:00:00	CET	BRINDISI_PORT -- Brindisi-Port	Brindisi-Port
Loading Begin	05.10.2020 23:59:59 CET		00:00:00	CET	BRINDISI_PORT -- Brindisi-Port	Brindisi-Port
Loading End	05.10.2020 23:59:59 CET		00:00:00	CET	BRINDISI_PORT -- Brindisi-Port	Brindisi-Port
Departure	05.10.2020 23:59:59 CET		00:00:00	CET	BRINDISI_PORT -- Brindisi-Port	Brindisi-Port
Document Sent	06.10.2020 23:59:59 CET		00:00:00	CET	BRINDISI_PORT -- Brindisi-Port	Brindisi-Port
Document Complete	07.10.2020 23:59:59 CET		00:00:00	CET	BRINDISI_PORT -- Brindisi-Port	Brindisi-Port
Tax Exemption	10.10.2020 18:38:45 WAT		00:00:00	WAT	BOMA_PORT -- Boma-Port	Boma-Port
Custom Clearance	14.10.2020 09:19:22 WAT		00:00:00	WAT	BOMA_PORT -- Boma-Port	Boma-Port
Arrival at Destination	15.10.2020 21:59:59 UTC		00:00:00	UTC	DAKAR_PORT -- Dakar-Port	Dakar-Port
Departure	16.10.2020 21:59:59 UTC		00:00:00	UTC	DAKAR_PORT -- Dakar-Port	Dakar-Port
Arrival at Destination	20.10.2020 18:38:45 WAT		00:00:00	WAT	BOMA_PORT -- Boma-Port	Boma-Port
Unloading Begin	20.10.2020 18:38:45 WAT		00:00:00	WAT	BOMA_PORT -- Boma-Port	Boma-Port
Unloading End	20.10.2020 18:38:45 WAT		00:00:00	WAT	BOMA_PORT -- Boma-Port	Boma-Port

Now the carrier & SRM Freight PO can be assigned.

## Update Freight Orders with Carrier and SRM Freight PO


After the Freight Forwarder was awarded, the Freight Order(s) in TM need to be updated with the agreed data as per solicitation. Please note, that this update needs to be done as soon as possible and before the shipment starts. The assignment of the carrier allows the Freight Order(s) to be sent to the CCP. The Freight Forwarder will only then have access to his assigned FOs to submit events and documents.

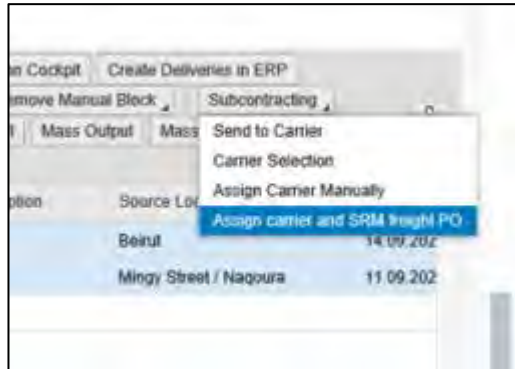
To update the Freight Forwarder and SRM Freight PO there are 2 ways of updating the FOs.

1. Mass update from the 'Overview Freight Orders':

Document	Document...	Carrier Description	SCAC	Source Location Description	Source Location Address
6100014947	ZFO1	Dummy Carrier / New York...		Boma-Port	Boma
6100014948	ZFO1	Dummy Carrier / New York...		Brindisi-Port	I- Brindisi BR
6100014931	ZFO1	Dummy Carrier / New York...		Walvis Bay-Port	Walvis Bay
6100014932	ZFO1	Dummy Carrier / New York...		Durban-Port	Durban

Search for the Freight Orders to be updated. Mark the FO lines, either through 'shift' and marking

the lines or choose  and choose 'select all' if all FOs displayed should be updated with the same freight forwarder and SRM PO number. Another option to select FOs is through 'ctrl' and marking the lines if not all FOs displayed should be updated and if they are not showing in sequence. Click on Subcontracting.



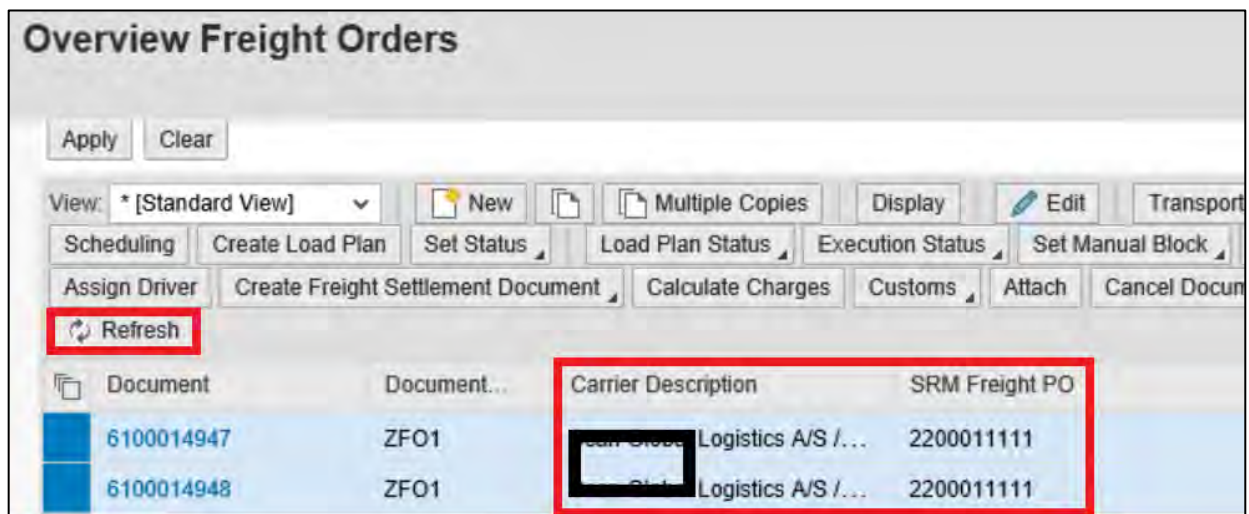
Choose 'Assign carrier and SRM freight PO'.



A dialog box titled 'Assign Carrier/Freight PO'. It contains the following fields: 'Carrier' with the value '111000XXXX', 'SCAC' (empty), 'Continuous Move' (checkbox, unchecked), and 'Freight Purc. Order' with the value '2200011111'. There are 'OK' and 'Cancel' buttons at the bottom right, with the 'OK' button highlighted by a red box.

Enter the carrier BP number and the SRM Freight PO. Confirm with 'Ok'.

To confirm that the data were updated, press 'Refresh'. A 'Carrier' field with the BP number is also available in the overview.



A screenshot of the 'Overview Freight Orders' interface. At the top, there are 'Apply' and 'Clear' buttons. Below them is a toolbar with various actions like 'New', 'Multiple Copies', 'Display', 'Edit', 'Transport', 'Scheduling', 'Create Load Plan', 'Set Status', 'Load Plan Status', 'Execution Status', 'Set Manual Block', 'Assign Driver', 'Create Freight Settlement Document', 'Calculate Charges', 'Customs', 'Attach', and 'Cancel Document'. The 'Refresh' button is highlighted with a red box. Below the toolbar is a table with columns: 'Document', 'Document...', 'Carrier Description', and 'SRM Freight PO'. Two rows are visible, both with 'ZFO1' in the 'Document...' column and '2200011111' in the 'SRM Freight PO' column. The 'Carrier Description' column contains 'Logistics A/S /...'. The first row has a blue selection bar on the left. The 'Refresh' button and the table rows are highlighted with red boxes.

Document	Document...	Carrier Description	SRM Freight PO
6100014947	ZFO1	Logistics A/S /...	2200011111
6100014948	ZFO1	Logistics A/S /...	2200011111

Please note, if the 'Assign carrier and SRM Freight PO' is carried out a second time the original data will be overwritten. In case a second SRM Freight PO must be assigned to a Freight Order, this needs to be done manually. Which is described in the 2. Step.

## 2. Manual updates in the Freight Order document

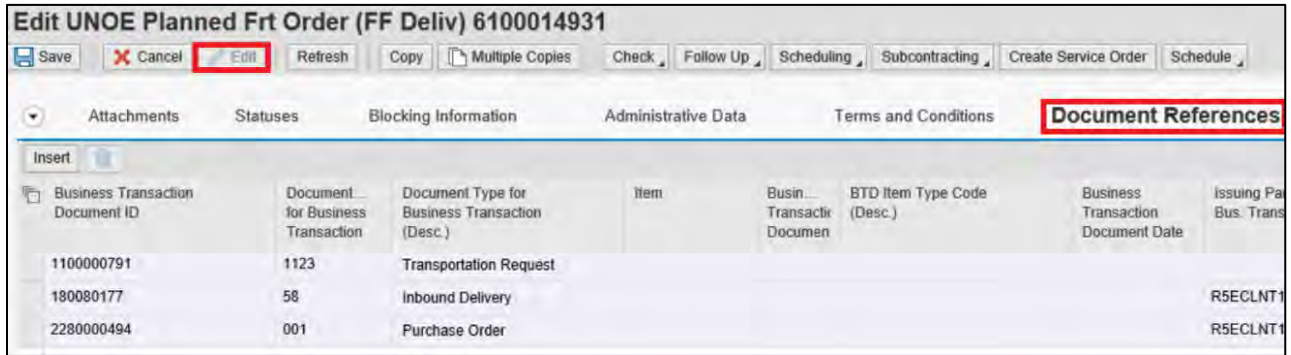
The screenshot shows the 'Edit UNOE Planned Frt Order (FF Deliv) 6100014931' interface. The 'Edit' button is highlighted in red. The 'Carrier' field in the 'Transportation' section is highlighted in red and contains the value 'ZDUMMY\_CAR'. Other fields include 'Document Type: ZFO1 UNOE Planned Frt Order (FF Deliv)', 'Transportation Mode: 01 Road', and 'Means of Transport: UNOE\_TRK UNOE Truck'.

Within the FO document click on 'Edit' mode and then choose the 'General Data' tab. In the field 'Carrier' on the right side, update from Dummy carrier to assigned carrier BP number, press 'Enter' to confirm that the BP number is correct. The carrier description is displayed to the right of the 'Carrier' field.

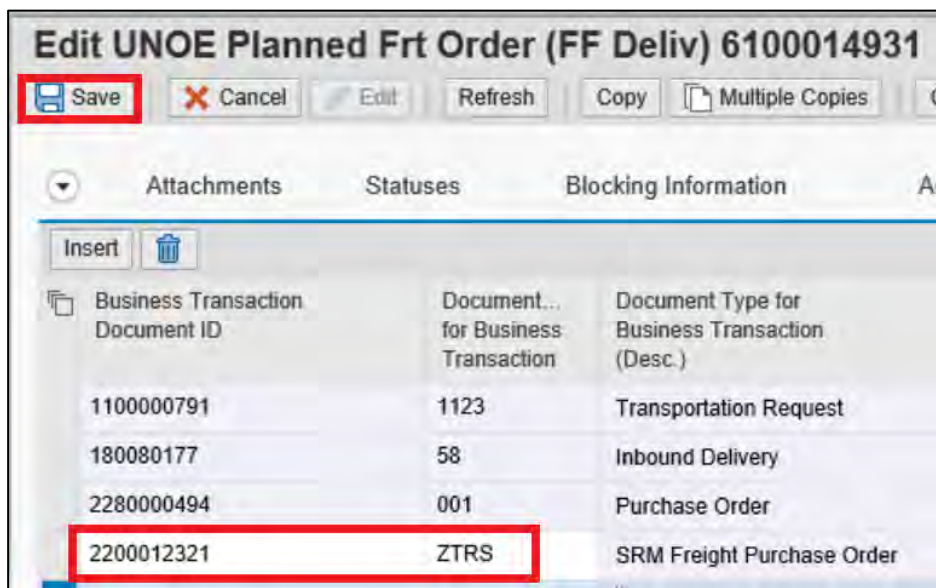
Please DO NOT save yet. Update all data SRM Freight PO, location/intermediate stops/date changes (if applicable) before saving the carrier update. Reason is that as soon as the carrier is assigned the FO status is set to 'Ready for Transport Execution', this might lead to wrong dates/locations in the CCP if dates/locations have not been updated yet, also intermediate stops cannot be entered when the FO status is 'Ready for Transport Execution'.

The screenshot shows the 'Edit UNOE Planned Frt Order (FF Deliv) 6100014931' interface. The 'Carrier' field in the 'Transportation' section is highlighted in red and contains the value '111000XXXX'. Other fields include 'Document Type: ZFO1 UNOE Planned Frt Order (FF Deliv)', 'Transportation Mode: 01 Road', and 'Means of Transport: UNOE\_TRK UNOE Truck'.

To update the SRM Freight PO manually on the FO, please go to the 'Document References' tab. If the 'Document References' tab is not displayed, please refer to the section Display additional Tabs in TM of this document to add it. In 'Edit' mode click on 'Insert'.



Enter the SRM Freight PO in a new row in the 'Business Transaction Document ID' column and 'ZTRS' in the 'Document Type for Business Transaction'. If applicable, further rows can be inserted and additional Freight POs entered.



After confirming that all necessary data were updated on the FO, please press 'Save' on the upper left. Please repeat the carrier assignment and SRM Freight PO update for any other FOs belonging to the same shipment (if applicable).

### Update Actual Cost for Freight Services

Open the Freight Order and choose 'Edit' mode to adjust the FO. Go to the 'Charges' tab.

The actual charges need to be updated on each FO. In most cases charges are entered per 'cbm', for air transport/movement the charges are entered per flight.

General Data Business Partner Items Stages Utilization Subcontracting Document Flow **Charges** Execution Notes

Invoicing Status: 01 Not Invoiced Calculation Date: 30.10.2020 23:09:49 CET  
 Charge Calc. Status: 02 Calculated Manually-Changed Calc. Date:  
 Total Amount in Local Currency: 8,440.00 USD Exchange Rate Date: 30.10.2020  
 Total Amount in Document Currency: 8,440.00 USD Manually-Changed Exchange Rate:  
 Rounded Total Amount in Document Currency: 8,440.00 USD  
 Rounded Amount Difference in Document Currency: 0.00 USD  
 Late Changes:

Charge Items Charge Analysis Log

Insert Views Show/Hide Details Multiple Rates Show/Hide Access Sequence Reset Charges

Charge Hierarchy	Late Changes	A...	Calc. Status	C..	C..	C..	L..	Rate Amo...	R..	M.	Ignore	P..	U..	Quan...	C..	Calculated Amount		
Sum																		
Scan Global Logistics A/S / 2...																		
Package 20 1000001659																		
Estimate Charge			ES: Esti					400.00	USD					1	M3	21.1	GR	8,440.00
Actual Charge			AC: Act						USD					1	M3	21.1	GR	
Custom Clearance Charge			CU: Cus						USD									

If only estimated charges are entered on a FO, these will be active charges and 'calculation status' shows in green and the 'Total Amount' in the header is the total of the estimated charges.

In 'Edit' mode update the 'Actual Charge' rate amount and press 'Enter'.

Save Cancel Edit Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting Create Service Order Schedule Set Stat

General Data Business Partner Items Stages Utilization Subcontracting Document Flow **Charges** Execution

Invoicing Status: 01 Not Invoiced Calculation Date: 30.10.2020 23:09:49  
 Charge Calc. Status: 02 Calculated Manually-Changed Calc. Date:  
 Total Amount in Local Currency: 9,495.00 USD Exchange Rate Date: 30.10.2020  
 Total Amount in Document Currency: 9,495.00 USD Manually-Changed Exchange Rate:  
 Rounded Total Amount in Document Currency: 9,495.00 USD  
 Rounded Amount Difference in Document Currency: 0.00 USD  
 Late Changes:

Charge Items Charge Analysis Log

Insert Views Show/Hide Details Multiple Rates Show/Hide Access Sequence Reset Charges

Charge Hierarchy	Late Changes	A...	Calc. Status	Rate Amo...	R..	M.	Ignore	P..	U..	Quan...	Calculation Base	Calculated Amo...		
Sum														
Scan Global Logistics A/S / 2...														
Package 20 1000001659														
Estimate Charge				400.00	USD					1	M3	21.1	GROSS_VOLUME	8,440.00
Actual Charge				450.00	USD					1	M3	21.1	GROSS_VOLUME	9,495.00
Custom Clearance Charge					USD									

The calculation status is now active for the 'Actual Charge' and the 'Total Amount' at header level shows now the total actual charge. Press 'Save' on the upper left. Please confirm that the header total shows only the actual charges & that the estimated charges calculation status does not show green anymore it should switch to yellow as soon as the actual charges were entered. If not, please verify that after the rate amount was entered "Enter" was pressed. This deactivates the estimated charges.

Save Cancel Edit Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting Create Service Order Schedule Set Sta

General Data Business Partner Items Stages Utilization Subcontracting Document Flow **Charges** Execution

Invoicing Status: 01 Not Invoiced Calculation Date: 30.10.2020 23:09:49  
 Charge Calc. Status: 02 Calculated Manually-Changed Calc. Date:  
 Total Amount in Local Currency: 9,995.00 USD Exchange Rate Date: 30.10.2020  
**Total Amount in Document Currency: 9,995.00 USD** Manually-Changed Exchange Rate...  
 Rounded Total Amount in Documen...: 9,995.00 USD  
 Rounded Amount Difference in Doc...: 0.00 USD  
 Late Changes:

Charge Items Charge Analysis Log

Insert Views Show/Hide Details Multiple Rates Show/Hide Access Sequence Reset Charges

Charge Hierarchy	Late Changes	A...	Calc. Status	Rate Amo...	R...	M. Ra	Ignore Calculation Rule	P...	U...	Quar...	Calculation Base	Calculated Amo...
Sum												
Scan Global Logistics A/S / 2...												
Package 20 1000001659												
Estimate Charge				400.00 USD				1	M3	21.1	GROSS_VOLUME	8,440.00
Actual Charge				450.00 USD				1	M3	21.1	GROSS_VOLUME	9,495.00
<b>Custom Clearance Charge</b>				<b>500.00 USD</b>								500.00

If applicable, 'Custom Clearance Charge' can be entered as a lump sum. Enter & Save. The custom clearance cost is added to the total amount at header level.

For air movements the actual charges are entered per flight. In below example are 2 Inbound flights and the cost is 75,000 USD per flight.

Save Cancel Edit Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting Create Service Order Schedule Set Status

General Data Business Partner Items Stages Utilization Subcontracting Document Flow **Charges** Execution Note

Invoicing Status: 01 Not Invoiced Calculation Date:  
 Charge Calc. Status: 02 Calculated Manually-Changed Calc. Date:  
 Total Amount in Local Currency: 150,000.00 USD Exchange Rate Date:  
**Total Amount in Document Currency: 150,000.00 USD** Manually-Changed Exchange Rate Date:  
 Rounded Total Amount in Document Currency: 150,000.00 USD  
 Rounded Amount Difference in Document Currency: 0.00 USD  
 Late Changes:

Charge Items Charge Analysis Log

Insert Views Show/Hide Details Multiple Rates Show/Hide Access Sequence Reset Charges

Charge Hierarchy	Logistical Reference	Rate Amount	R...	M. Ra	Ignore Calculation Rule	P...	U...	Q...	Calculation Base	Calculated Amount	C...
Estimate Charge	10 - TROOPS		USD			1	EA	340	QUANTITY_VAL		U...
Estimate Charge	20 - POSITIONING_FLIGHT		USD			1	EA	1	QUANTITY_VAL		U...
Estimate Charge	30 - INBOUND_FLIGHT	50,000.00	USD			1	EA	2	QUANTITY_VAL	100,000.00	U...
Estimate Charge	40 - CABINBAGGAGE		USD			1	EA	340	QUANTITY_VAL		U...
Estimate Charge	50 - CARGOBAGGAGE		USD			1	EA	1,360	QUANTITY_VAL		U...
Actual Charge	10 - TROOPS		USD			1	EA	340	QUANTITY_VAL		U...
Actual Charge	20 - POSITIONING_FLIGHT		USD			1	EA	1	QUANTITY_VAL		U...
<b>Actual Charge</b>	<b>30 - INBOUND_FLIGHT</b>	<b>75,000.00</b>	<b>USD</b>			<b>1</b>	<b>EA</b>	<b>2</b>	<b>QUANTITY_VAL</b>	<b>150,000.00</b>	<b>U...</b>
Actual Charge	40 - CABINBAGGAGE		USD			1	EA	340	QUANTITY_VAL		U...
Actual Charge	50 - CARGOBAGGAGE		USD			1	EA	1,360	QUANTITY_VAL		U...



## Deletion of Freight Order

In some cases, it is necessary to delete existing Freight Orders (FOs). The shipment might have gotten canceled, or needs to be completely re-planned, or the FO got detached from other TM documents or the Goods PO might need to be amended. Freight Orders might also need to be deleted for DAP cases where the system planned FOs automatically but picked the wrong means of transport and shipment/movement needs to be re-planned with the correct route/means of transport. Route changes with no change in means of transport can usually be corrected as described in section Update Dates and Locations of this document. After the FO(s) were deleted, the FU should be deleted as well for cases where a re-planning needs to happen. For cases where the complete shipment has been canceled or the PO needs to be amended, the FU does not need to be deleted separately. The FU will be deleted automatically when the Forwarding Order (FWO) or IBD/OBD get cancelled.


Please note that FOs cannot be deleted anymore if they are in status “in Execution” or completed/executed.

There are three ways to cancel Freight Orders.

1. Mass deletion from the ‘Overview Freight Orders’:

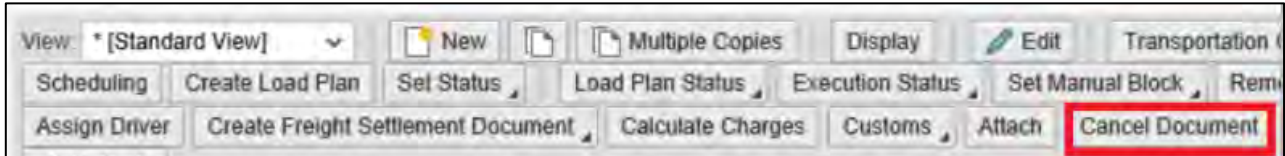
Document	Document	SGAC	Source Location Description	Source Location Address
6100013018	ZFO1		Beirut-Port	Beirut
6100013019	ZFO1		Naqoura-Port	Naqoura
6100012985	ZFO1		Naqoura-Port	Naqoura

Search for the Freight Orders to be deleted. Mark the FO lines, either through ‘shift’ and

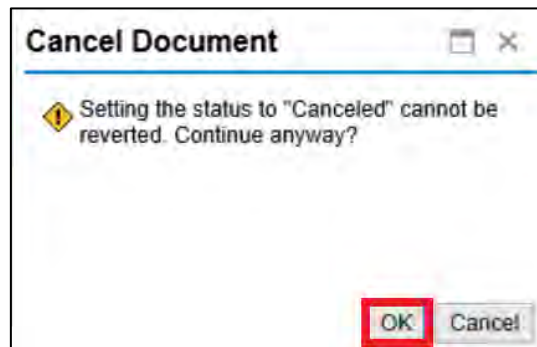
marking the lines or choose  and choose ‘select all’ if all FOs displayed should be deleted. Another option to select FOs is through ‘ctrl’ and marking the lines if not all FOs displayed should be deleted and if they are not showing in sequence.

Document	Document...	SCAC	Source Location Description	Source Location Address
6100013018	ZFO1		Beirut-Port	Beirut
6100013019	ZFO1		Naqoura-Port	Naqoura
6100012985	ZFO1		Naqoura-Port	Naqoura
6100012986	ZFO1		Amsterdam-Port	Amsterdam
6100012879	ZFO1		Naqoura-Port	Naqoura

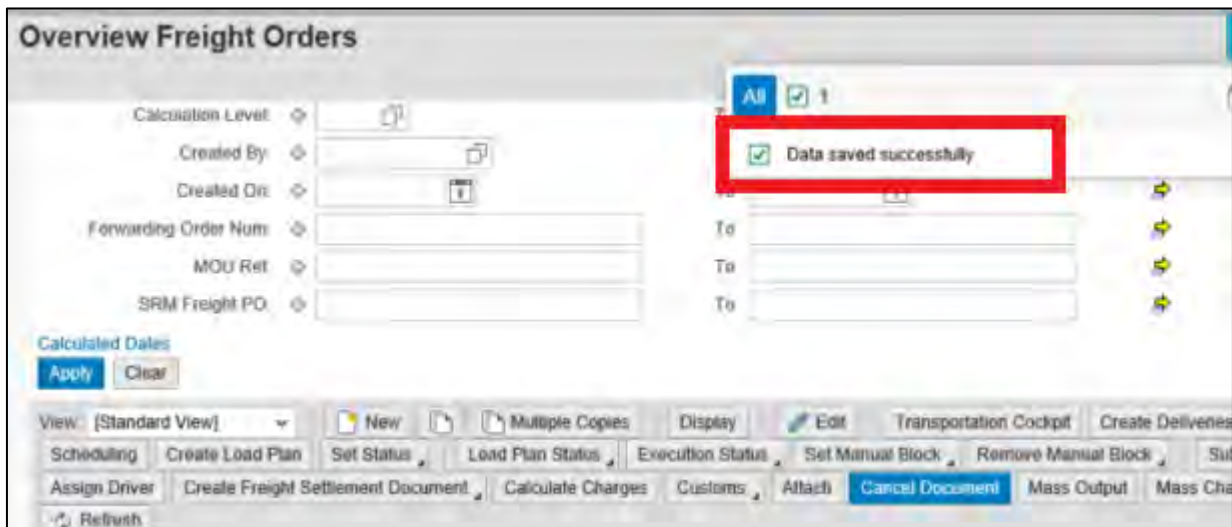
After the correct lines are selected, click 'Cancel Document'.

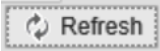


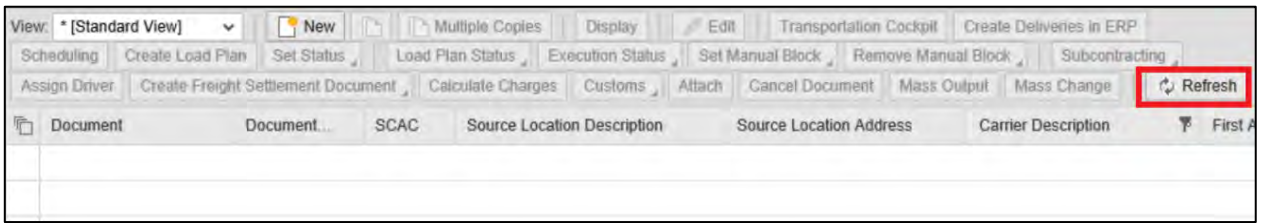
Confirm with 'OK'.



The FOs were deleted.

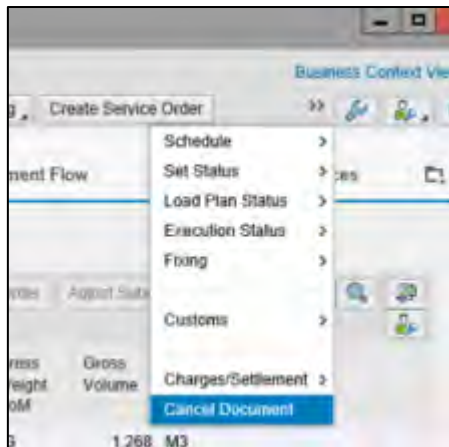
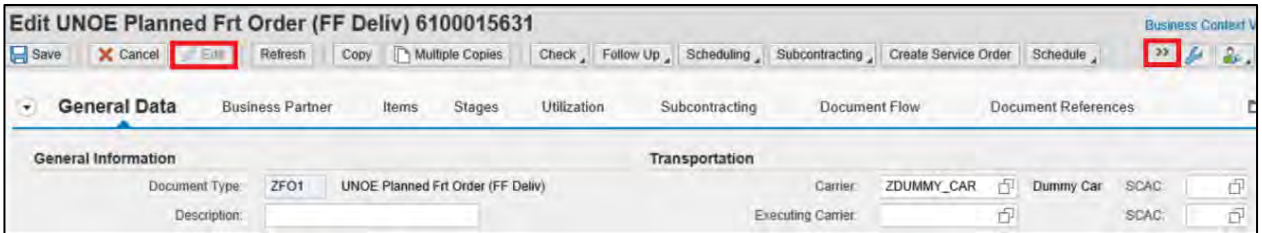


To confirm press the refresh  button and the FOs should not appear in the search anymore.

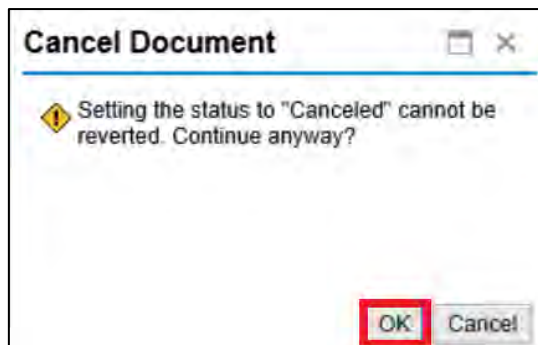


2. FOs can be deleted in the Freight Order document directly:

Within the FO document click on 'Edit' mode and then on the two arrows >> at the right.



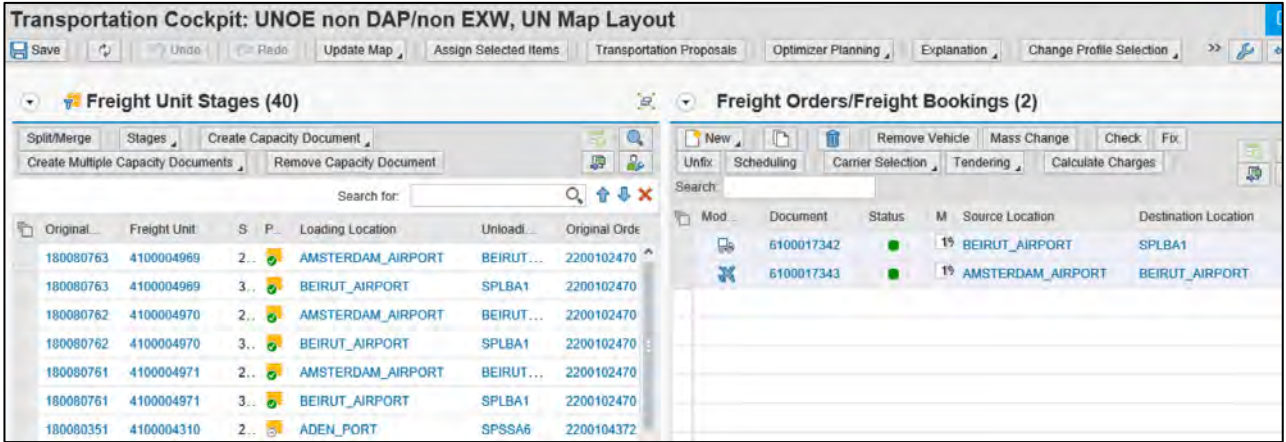
Choose the last option 'Cancel Document'.



Confirm with 'Ok'. The FO is cancelled.

3. FOs can be deleted after planning in the cockpit:

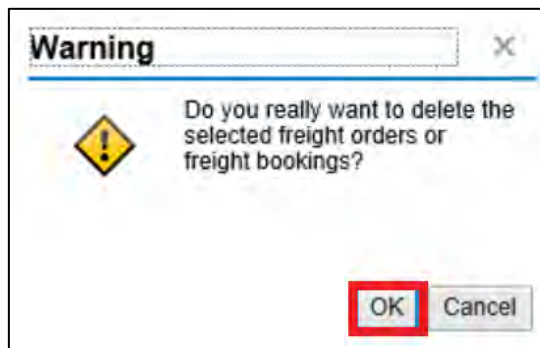
This deletion can only be executed by the transportation planner and only right after FOs were saved.



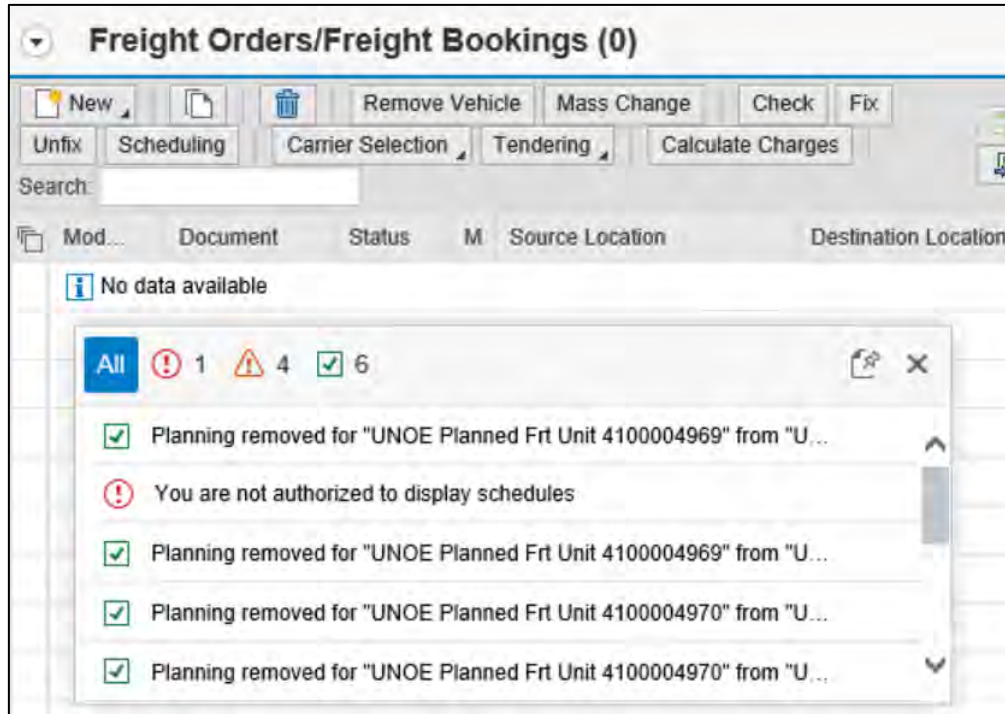
Mark the FO(s) to be deleted under the “Freight Orders/Freight Bookings” section, then press “delete”.



Confirm with “OK”.



A message appears that planning was removed for the involved FUs.

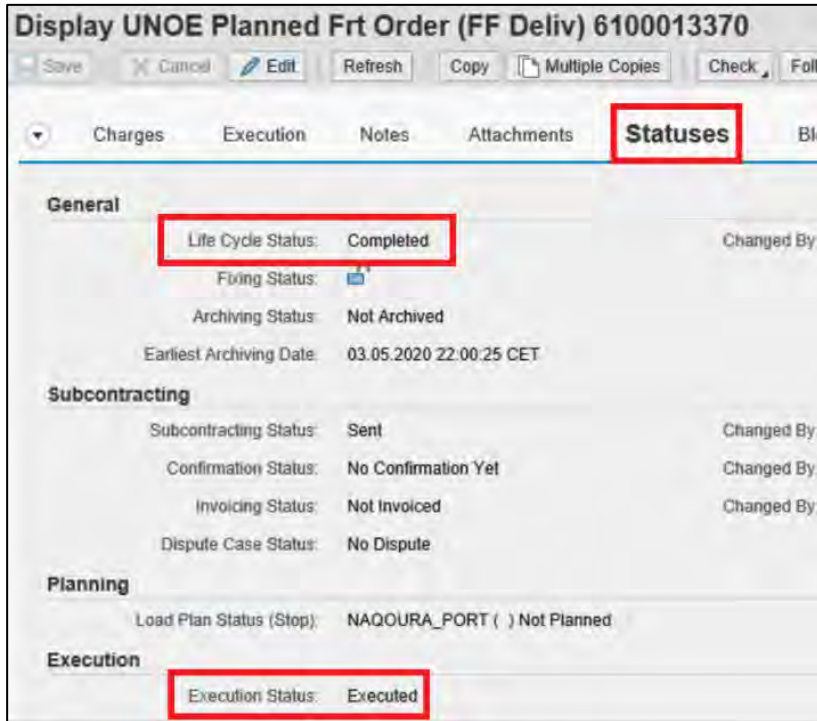


To confirm the FO deletion, click “Save” on the upper left in the cockpit.

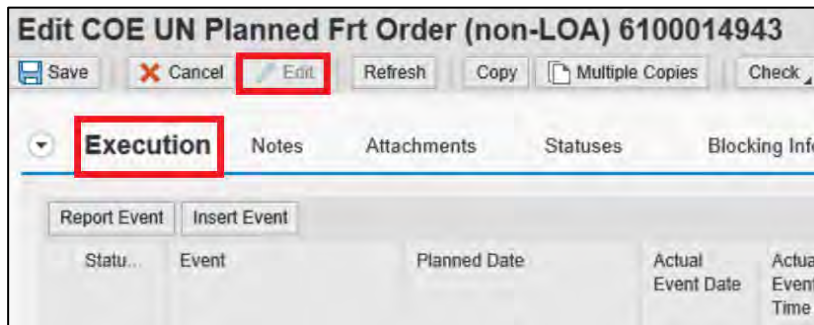


### Different Status and Completion of Freight Order

The submission of **events** has impact on the **Freight Order status** in TM. Events submitted such as loading begin/loading end do not change the FO status in TM. Departure/Arrival events do change the FO status to “**In Execution**” and the Freight Order **cannot be deleted** anymore, and certain changes are **not** possible anymore. The event “**Proof of Delivery**” (**POD**) is an expected event on the last FO of a shipment/movement. As soon as the POD is submitted the status of the FO changes to “**Executed**” and the shipment/movement is finalized/completed and cannot be edited anymore. In case there are further FOs belonging to the same shipment a batch job will run over night and set all FOs belonging to the same shipment to “**Completed**” for the **Life Cycle** status. The execution status for these pre- and main-carriage FOs will not get updated through the batch job.



To close a FO, go the 'Execution' tab and choose 'Edit' mode. Please make sure before closing the FO that all shipment data are correct and complete, necessary documents are uploaded, and other relevant events were submitted.



Mark the 'Proof of Delivery' event line and fill the date/time when the event happened. Click 'Report Event' and then 'Save'.

Statu...	Event	Planned Date	Actual Event Date	Actual Event Time
	Loading Begin	14.09.2020 18:42:22 L...		00:00:00
	Loading End	14.09.2020 18:42:22 L...		00:00:00
	Departure	14.09.2020 18:42:22 L...	15.09.2020	00:00:00
	Document Sent	15.09.2020 18:42:22 L...	16.09.2020	00:00:00
	Document Complete	16.09.2020 18:42:22 L...	18.09.2020	00:00:00
	Tax Exemption	06.10.2020 03:45:32 U...	01.10.2020	00:00:00
	Custom Clearance	01.10.2020 11:13:57 U...	05.10.2020	00:00:00
	Unloading Begin	16.10.2020 03:45:32 U...		00:00:00
	Unloading End	16.10.2020 03:45:32 U...		00:00:00
	Arrival at Destination	16.10.2020 03:45:32 U...	17.10.2020	00:00:00
	Proof of Delivery	18.10.2020 05:45:32 U...	23.	00:00:00

Alternatively, after marking the event line, details can be filled on the bottom of the page. Additionally, to date and time an event reason could be entered if desired. Click 'Report Event' and then 'Save'.

Execution		Note
Event:	Proof of Delivery	
Event Reason:	<input type="text"/>	
Event Reason Code:	<input type="text"/>	
Planned Date:	18.10.2020 05:45:32 UTC-5	
Actual Event Date:	23.10.2020	11:00:00 UTC-5
Location:	LIMA_PORT -- Lima-Port	
Item:	<input type="text"/>	
Source of Exec. Information:		

For further details on how to submit events in TM please refer to [How can events, documents, notes be submitted / uploaded in TM?](#)

## Chapter 9. TM Master Data

TM planning works through a transportation network and stored estimated charges. If any of the master data are missing or need to be updated, a request needs to be submitted.

Access for external partners to the CCP also falls under Master Data. If a new contact person needs to be added or revised, a request needs to be submitted.

For the following Master Data that exist in TM, changes/additions can be requested:

- Transportation Management - Contact Person
- Assign Transshipment Points (Assigned by MDM team)
- COE Pickup Location
- Default Routes
- Transportation Lanes
- Locations
- TM Products
- Estimated Charges
- Vendors
- Internal Partners / Email notifications

### Contact Person (Business Partner)

For external partner that need access to the CCP a request needs to be submitted. Afterwards a contact person (business partner) for the individual can be created. The contact person will be connected to the BP of the company they work for.

The below screenshot shows which data are needed to create a new contact person.



Field	User Instructions
Commercial BP	Enter the BP number for the commercial vendor*. This is necessary to link the Contact Person to the appropriate commercial BP. If the commercial BP does not exist yet, submit a request for creation using the MDM InfoPath Form "Business Partner Commercial Company" first to request the creation. Note: Only one commercial BP can be entered on the InfoPath form and Excel file. If changes are requested for multiple commercial BPs, then one InfoPath form and one Excel file must be submitted for each commercial BP.
Action	This column indicates what action is requested - Create. Note: a maximum of 5 contact persons can be created in one InfoPath form.
External Contact	All Transportation Management contact persons are External.
Org ID (Procurement)	Enter the Org ID (Procurement) since the contact person is External.
Org Description (Procurement)	Enter the Org Description (Procurement) related to the Org Id provided.
Title (Mr./Ms.)	Select "Mr." or "Ms."
First Name	Enter the first name as provided in a national passport, birth certificate or other official document.
Middle Name	Enter the middle name as provided in a national passport, birth certificate or other official document. Optional
Last Name	Enter the last name as provided in a national passport, birth certificate or other official document.
Date of Birth (DD/MM/YYYY)	Enter the date of birth as provided in a national passport, birth certificate or other official document. Enter the date using the DD/MM/YYYY format, e.g. 31/01/1966.
Email	Enter the contact person's email address. In the rare case where the person may not have an email address, enter the email address of the commercial entity i.e. the contact person's employer.
Telephone (including country code)	Enter the contact person's telephone number. In the rare case where the person may not have a telephone number, enter the number of the commercial entity i.e. the contact person's employer. Enter country code followed by the telephone number. E.g. 1-917-392-9399.
Valid from Date (DD/MM/YYYY)	Enter the valid from date in the DD/MM/YYYY format, e.g. 31/05/2019
Valid to Date (DD/MM/YYYY)	Enter the valid to date in the DD/MM/YYYY format, e.g. 20/06/2021
Number	<i>Enter the building number of the commercial vendor's address. Optional</i>
Street	<i>Enter the street name of the commercial vendor's address. Optional</i>
City	<i>Enter the commercial vendor's City. Optional</i>
Region	<i>Enter the commercial vendor's Region. Optional</i>
Postal Code	<i>Enter the commercial vendor's Postal Code. Optional</i>
Country	<i>Enter the commercial vendor's Country. Optional</i>
Unite ID of Contact Person	Entered by OICT.
TM Contact BP	Entered by the Master Data Team (MDM).

In case an existing contact person data need to be updated, a request also needs to be submitted. The below screenshot shows which data are needed to update a new contact person.

Field	User instructions
Commercial BP	Enter the BP number for the commercial vendor*. This is necessary to identify the appropriate Contact Person.
Action	This column indicates what action is requested. For updates, two lines should be filled. The first line "Update (Before)" provides the information previously submitted that needs to be updated. The second line "Update (After)" provides the new information that will be entered on the Contact Person master record. Note: a maximum of 5 contact persons can be updated in one InfoPath form.
Unite ID of Contact Person	Enter the Unite ID of the contact person. This is needed to ensure the correct person is updated.
External Contact	All Transportation Management contact persons are External.
TM Contact BP	Enter the BP number for the contact person to be updated. This field contains alpha characters and generally corresponds to the Unite ID of the contact person. Note: The Unite ID can have up to 12 alpha characters while the BP number is limited to 10 characters. In rare cases where the Unite ID exceeds 10 characters, the first character(s) of the Unite ID are <u>truncated</u> and the remaining 10 characters are used as the BP number.
Org ID (Procurement)	Enter the Org ID (Procurement) since the contact person is External.
Org Description (Procurement)	Enter the Org Description (Procurement) related to the Org id provided.
Title (Mr./Ms.)	Select "Mr." or "Ms."
First Name	Enter the first name as provided in a national passport, birth certificate or other official document.
Middle Name	Enter the middle name as provided in a national passport, birth certificate or other official document. Optional
Last Name	Enter the last name as provided in a national passport, birth certificate or other official document.
Email	Enter the contact person's email address. In the rare case where the person may not have an email address, enter the email address of the commercial entity i.e. the contact person's employer.
Telephone (including country code)	Enter the contact person's telephone number. In the rare case where the person may not have a telephone number, enter the number of the commercial entity i.e. the contact person's employer. Enter country code followed by the telephone number. E.g. 1-917-392-9399.
Valid from Date (DD/MM/YYYY)	Enter the valid from date in the DD/MM/YYYY format, e.g. 31/05/2019
Valid to Date (DD/MM/YYYY)	Enter the valid to date in the DD/MM/YYYY format, e.g. 20/06/2021
Number	<i>Enter the building number of the commercial vendor's address. Optional</i>
Street	<i>Enter the street name of the commercial vendor's address. Optional</i>
City	<i>Enter the commercial vendor's City. Optional</i>
Region	<i>Enter the commercial vendor's Region. Optional</i>
Postal Code	<i>Enter the commercial vendor's Postal Code. Optional</i>
Country	<i>Enter the commercial vendor's Country. Optional</i>

In case an existing contact person data need to be expired, a request needs to be submitted. A case when the access should be expired is when the contact person stops working for the external partner.

Field	User Instructions
Commercial BP	Enter the BP number for the commercial vendor*. This is necessary to expire the appropriate Contact Person.
Action	This column indicates what action is requested - Expire. Note: a maximum of 5 contact persons can be expired in one InfoPath form.
Unite ID of Contact Person	Enter the Unite ID of the contact person. This is needed to ensure the correct person's access is expired.
External Contact	All Transportation Management contact persons are External.
TM Contact BP	Enter the BP number for the contact person to be expired. This field contains alpha characters and generally corresponds to the Unite ID of the contact person. Note: The Unite ID can have up to 12 alpha characters while the BP number is limited to 10 characters. In rare cases where the Unite ID exceeds 10 characters, the first character(s) of the Unite ID are <u>truncated</u> and the remaining 10 characters are used as the BP number.
Title (Mr./Ms.)	Select "Mr." or "Ms."
First Name	Enter the first name as provided in a national passport, birth certificate or other official document.
Middle Name	Enter the middle name as provided in a national passport, birth certificate or other official document. Optional
Last Name	Enter the last name as provided in a national passport, birth certificate or other official document.
Email	Enter the contact person's email address. In the rare case where the person may not have an email address enter the email address of the commercial entity i.e. the contact person's employer.
Valid from Date (DD/MM/YYYY)	Enter the valid from date in the DD/MM/YYYY format, e.g. 31/05/2019
Valid to Date (DD/MM/YYYY)	Enter the valid to date in the DD/MM/YYYY format, e.g. 20/06/2021

## COE Pickup Locations

COE Pickup Locations are needed to upload Forwarding Orders (FWO) in TM. Usually a city without a specific address is used for the FWO upload. If a city is missing, it needs to be requested. That COE pickup location shall correspond to a TCC/PCC BP number if the location is in a member country.

The Pickup location gets created in ECC first and is then transferred to TM. Troops pickup locations can as well be created under COE pickup locations except if it is an airport, then please refer to the below "Locations" section.

The below screenshot shows which data are needed.

Field	User Instructions	Max Length	Required
Contributing Country	Name of the country providing contingent owned equipment	40	Y
Name of Location	Free text name of the COE pickup location	40	Y
Street	Street address of the COE pickup location	50	N
Postal Code	Post code of the COE pickup location	10	N
City	City of the COE pickup location	40	Y
Country	Country of the COE pickup location - 2-digit ISO code	2	Y
Region	Region of the COE pickup location - Country_Region. For example: US_NY	6	Y
Port of Exit	Port of exit - the transport management location id of the port through which the COE will be shipped Example: KOLKATA_PORT	40	Y
Country of Port of Exit	The country of the port of exit - 2-digit ISO code. The country of the port of exit does not have to be the same as the country of the pickup location. For example: KOLKATA_PORT is the port of exit for Kathmandu	2	Y
Region of Port of Exit	Region of port of exit - Country_Region. Example: ML_BKO (Mali Bamako)	6	Y
Remarks	Provide any remarks or additional information to the MDM team to assist in the creation of the data		N

## Default Routes

Default Routes can be created between locations in TM if this is the preferred route that is usually taken. The Transportation cockpit would suggest this route (among others) and the transportation proposals can be sorted so that the default routes shows on top of the results. The below screenshot shows which data are needed.

Field	User Instructions	Max Length	Required
Default Route Number	Not loaded. Not required. Can be used to identify the legs that belong to the same default route. Description also serves this function, but the number can be easier to identify visually.	10	N
Description	Description of the default route. Created by concatenating the location from each leg separated by ">". For example: if there is a route from Italy (IT) to Mali (ML) via Savona port (SAVONA_P) in Italy and Abidjan (ABIDJAN_P) in the Ivory Coast, the description would be: IT>SAVONA_P>ABIDJAN_P>ML Note: the indicators of the type of location are abbreviated to one letter to reduce characters. Hence location SAVONA_PORT is represented as SAVONA_P.	40	Y
Dangerous goods	Indicates if the route is / can be used to transport dangerous goods. Valid values are: X Dangerous Goods Only " " Non-Dangerous Only "A" All	1	N
<i>The default route contains multiple legs the data for each is as follows:</i>			
Sequence	The sequene of the leg 10, 20, 30, 40, etc.		2
Location	The start location of the leg. This must be a valid TM location Id, and can correspond to a: Zone, Vendor, COE Pickup Location	20	Y
Stage Type	02 Pre, 03 Main, 04 On-Carriage - not required for the last leg Note: not currently loaded		2
Means of Transport	Indicates the means of transport and whether it is for UNOE or COE, valid values are: UNOE_TRK, UNOE_SEA, UNOE_AIR, COE_TRK, COE_SEA, COE_AIR, TROOPS_AIR Note: not currently loaded	10	N
Remarks			N

## Transportation Lanes

A Transportation Lane is the connection between two locations. If a new location/pickup location was requested, additionally lanes need to be requested otherwise the TM planning cockpit would not be able to suggest routes that connect those locations. Lanes are created by means of transport. If a new COE pickup location was requested, the lanes for COE\_TRK for incoming and outgoing transports to the loading/unloading port/airport should be requested as well.

The below screenshot shows which data are needed.

Please note that the field “Transportation Costs” is only used for internal purposes. This field does not reflect real transportation cost for this lane but only a value to prioritize the lane in the cockpit proposals. If the lane cost is 1, the lane would be preferred over one with lane cost 999.

Field	User Instructions	Max Length	Required
Leg Type	Values: PRE, MAIN, ON This field is not loaded. It is used to validate the data provided. 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		4Y
Start Location / Zone	Valid TM Location Id, Zone, COE pickup location, vendor Examples: Location Id: INCHEON_PORT Zone: ML_BKO (Mali, Bamako) COE pickup location: SUNP-00001 (Kathmandu) Vendor: SU1110030197 (KIA MOTORS)		20Y
End Location / Zone	Valid TM Location Id, Zone, COE pickup location. See examples in start location / zone		20Y
Means of Transport	Means of Transport Description UNOE_TRK UN owned equipment - truck / land UNOE_SEA UN owned equipment - sea UNOE_AIR UN owned equipment - air COE_TRK Contingent owned equipment - truck / land COE_SEA Contingent owned equipment - sea COE_AIR Contingent owned equipment - air TROOPS_AIR Troops - air TROOPS_TRK Troops - truck / land TROOPS_SEA Troops - sea		14Y
Transportation Costs	Relative indicator of cost. Values are: 1 or 999. 1 for low cost, 999 for high cost		3Y
Unit for Cost Rate	KM - kilometers		2Y
Remarks	Provide any remarks or additional information to the MDM team to assist in the creation of the data		N

## Locations

Locations (**except** COE pickup locations and Shipping Points originating from ECC) can be requested to be created in TM directly. Usually ports or airports are requested to be added to the TM network, but it could also be a vendor factory location (for EXW cases). Factories locations could be applicable for UNOE shipments. Please also indicate if the location is a Handover Location (HOL), only applicable for UNOE/STO.

The below screenshot shows which data are needed.

Field	User Instructions	Max Length	Required
Location Id	UPPER CASE - NAME_TYPE - example: HAMBURG_PORT - type can be AIRPORT, FACTORY, PORT (from location type) - max 20 chars	20Y	
Location description	Max 40 chars	40Y	
Location type	Airport, Factory, Port	15Y	
IATA CODE	IATA airport code for airports only - required for airports	3N	
UN/LOCODE	UN codes for trade and transport locations: seaports, rail and road terminals, airports	6N	
<b>Handover Location</b>			
Handover Location	"Y" if this is a vendor handover location - i.e. where responsibility / ownership is transferred to the UN or a freight forwarder	1N	
Supplier BP#	BP# of supplier that uses this location as a handover location	10N	
Supplier BP Name	Name of supplier that uses this location as a handover location	40N	
<b>Serves Landlocked Regions</b>			
Serves Landlocked Regions	Cases where ports serve landlocked countries. For example: MOMBASA_PORT serves Goma in Democratic Republic of Congo. Goma is in NK region so the region CD_NK would be specified. Use the columns to specify up to 8 regions in landlocked countries that are served by the location, format: Country code_region code (example: US_NY)	6N	

<i>Geographic Coordinates - not required - defaulted</i>			N
Longitude Sign	+ or -		1N
Longitude Degree	0-180		3N
Longitude Minutes	0-59		2N
Longitude Seconds	0-59		2N
Latitude Sign	+ or -		1N
Latitude Degree	0-180		3N
Latitude Minutes	0-59		2N
Latitude Seconds	0-59		2N
<b>Address</b>			
Street	Street address of the location		50N
House Number	House number of the location		10N
Postal Code	Post code of the location		10Y
City	City of the location		40Y
Country	Country of the location - 2-digit ISO code		2Y
Region	Region of the location - Country_Region. For example: US_NY, valid TM region		6Y
Remarks	Provide any remarks or additional information to the MDM team to assist in the creation of the data		N

## TM Products

For COE and Troops movements, generic products were created directly in TM. This is needed to identify the cargo/passengers. Besides the below mentioned types DGContainer20 (20'),

DGContainer40 (40'), DGCabinbaggage, DGCargobaggage, and UnitCargo exist. While for air movements inbound/outbound as well as (de)positioning flights as products exist, mainly used for cost capture.

Field	User Instructions	Max Length	Required
Scenario	Indicates whether the product is for COE or TROOPS. Valid values are COE, TROOPS		6Y
Product Id	Product Id - of the good or service - free text UPPER CASE - max 20 chars		20Y
Description	Free text description of the good or service - max 40 chars		40Y
Item Type	Type of good or service from dropdown: Item Type Description ZBRB Break Bulk ZCBB Cabin Baggage ZCON Container ZCRB Cargo Baggage ZTRL Trailer ZTRS Troop Flight ZVEH Vehicle		4Y
Remarks	Provide any remarks or additional information to the MDM team to assist in the creation of the data		N

### Estimated Charges

TM has the functionality to calculate estimated charges for shipments automatically. The current prices in TM are derived from historic data. The rates are in USD and different cost for dangerous goods can be captured.

The rates are maintained for different regions/zones and by cbm. Here a range for different sizes of shipments is available ( $\leq 100 \text{ m}^3$ ,  $\leq 200 \text{ m}^3$ ,  $\leq 300 \text{ m}^3$ , and  $\leq 10,000 \text{ m}^3$ ).

Valid From	Valid To	Aggregated Rate Desc.	Life Cycle Status	Currency	Rounding Profile
27.12.2018	31.12.2099		Released	USD	
			In Process		
			In Process		

Details: Validity From 27.12.2018 To 31.12.2099

Rates Calculation Rules

insert Delete Generate Scale Items Display Rates Select Column Scale Freeze Column View: [Standard View] Print Version Export

Show/Hide Details

Transportation Zone...	Transportation Zone...	S...	P...	D...	Dangerous Goods (-	<= 100 M3...	<= 200 M3 ( R )	<= 300 M3 ( R )	<= 10,000 M3 ( R )
AE_DU	CM_LT	*	*	*		176.98	134.16	134.16	134.16
AE_DU	IL_HA	*	*	*		67.00	63.70	60.30	53.60
AE_DU	IL_TA	*	*	*		67.00	63.70	60.30	53.60
AE_DU	IQ_BA	*	*	*		133.00	126.35	120.03	114.03
AE_DU	IR_23	*	*	*		133.00	126.35	120.03	114.03
AE_DU	IR_23	*	*	*	X	155.00	147.25	139.89	132.90
AE_DU	IT_SA	*	*	*		48.48	48.48	48.48	48.48
AE_DU	KE_28	*	*	*		41.59	41.59	41.59	41.59

If rates need to be updated, a request needs to be submitted for further processing by the MDM team.

## Vendors

Vendor master data for goods vendors or freight forwarders are transferred from ECC to TM. The vendors need to be approved first and created in ECC. All global system contracts goods vendors are already available in TM. Local or regional vendors could be made TM relevant if all missions/entities that use this vendor agree to this decision. Please log an iNeed ticket in case a local/regional vendor should be set to TM relevant.

All global freight forwarders are already available in TM. New and/or local freight forwarders can be requested for transfer to TM through the "CIF Template" as described in the section How to request Master Data for TM.

## Internal Business Partners / Email notifications

TM can send automatic email notifications for events submitted through the CCP/TM and for overdue events. This email notification is set up for crucial expected events and for all unexpected events. The notifications are sent by function. Different notifications are sent to

- Transportation Planner
- Freight Buyer
- R & I

A generic email per function should be provided to set up the notifications. If a change to an existing email address is needed or a new email notification needs to be set up, please log an iNeed ticket for Transportation Management with a detailed request description.

## How to request Master Data for TM

TM Master Data forms are available in iSeek: [https://iseek.un.org/departamental\\_page/master-data-maintenance-0](https://iseek.un.org/departamental_page/master-data-maintenance-0)



https://iseek.un.org/departments/\_page/master-data-maintenance-3

Master Data Maintenance (...

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## Master Data Maintenance (MDM)

This page contains the Master Data Maintenance overview and links to forms, processes, job aids, BP bulk upload, and coding block information.

### MASTER DATA MAINTENANCE PROCESS OVERVIEW

To place a request for Umoja Master Data Maintenance (MDM), please follow these steps:

1. Select and download the appropriate form below. Please note: Some of the Master Data forms require Microsoft InfoPath installed on your computer, Microsoft InfoPath is a UN standard application and should be already installed in your computer. If for any reason you need to install MS InfoPath please follow these instructions [Click here](#)

#### Master Data Request Process for all InfoPath forms only:

1. The InfoPath form should be downloaded from iSeek each time the need arises as the forms are updated often to include new business requirements or new features
2. Note that if an older version of an InfoPath form is used, it will check whether it is the latest version and will try to download the latest version. If asked to download, please let it proceed
3. Make sure that all mandatory fields (highlighted in yellow background) in the form are populated
4. Ensure that the original format of the InfoPath form (xml) is attached to the email sent to [umoja-mdm@un.org](mailto:umoja-mdm@un.org). Any other formats/renderings of the InfoPath form (PDFs, scanned images, html) are not accepted as valid requests and therefore they will be automatically rejected and the requestor notified, in this case, please re-submit your request with the valid InfoPath format
5. After the submission via email, the requestor should receive two separate notifications, one to confirm that the request has been received and the second to confirm the iNeed Service Request number. If any of these two email notifications is not received it could indicate a problem with your submission
6. Multiple InfoPath forms in a single email are allowed only if other types of attachments are not included (such as supporting documentation). Multiple InfoPath forms in a single email with multiple attachments (other types) will be rejected.
7. If the Master Data Maintenance Team has questions on the request or is requesting supporting documentation they will contact the requestor via email. Please respond promptly to their questions as this will ensure your requests are completed without further delays.

To get to the TM relevant forms (InfoPath and Excel) scroll down to “Transportation Management MDM Templates” section.

Transportation Management MDM Templates			
Transportation Management - Contact Person	<a href="#">TM MDM Template - Contact Person (Infopath)</a> <a href="#">TM MDM Template - Contact Person (Excel)</a>	InfoPath MS Excel	Submit both forms to <a href="mailto:umoja-mdm@un.org">umoja-mdm@un.org</a>
CIF Template	<a href="#">TM MDM Template - CIF</a>	MS Excel	Submit via <a href="#">iNeed Self Service</a> In iNeed Self Service, choose "Umoja Catalogue". Choose "Master Data Maintenance" in the filter. Then, choose "CIF Template"
Assign Transshipment Points	<a href="#">TM MDM Template - Assign Transshipment Points (InfoPath)</a> <a href="#">TM MDM Template - Assign Transshipment Points (Excel)</a>	InfoPath MS Excel	If requesting one item, submit the InfoPath form to <a href="mailto:umoja-mdm@un.org">umoja-mdm@un.org</a> If requesting multiple items, submit both the InfoPath form and the Excel template to <a href="mailto:umoja-mdm@un.org">umoja-mdm@un.org</a>
COE Pickup Location	<a href="#">TM MDM Template - COE Pickup Location (InfoPath)</a> <a href="#">TM MDM Template - COE Pickup Location (Excel)</a>	InfoPath MS Excel	If requesting one item, submit the InfoPath form to <a href="mailto:umoja-mdm@un.org">umoja-mdm@un.org</a> If requesting multiple items, submit both the InfoPath form and the Excel template to <a href="mailto:umoja-mdm@un.org">umoja-mdm@un.org</a>

There are two types of templates that need to be filled. For a single item request the InfoPath and if more than 1 item is requested, both the InfoPath and the Excel template need to be filled and submitted.

All submissions are sent to [umoja-mdm@un.org](mailto:umoja-mdm@un.org)

For single items use InfoPath Form

For multiple items use excel template

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Both, InfoPath and Excel template have instructions embedded how to fill the file(s):

Instructions					
Overview					
Contingent Owned Equipment (COE) Pickup Locations are locations where the UN receives and / or returns COE from member states.					
Field	User Instructions			Max Length	Required
Contributing Country	Name of the country providing contingent owned equipment			40	Y
Name of Location	Free text name of the COE pickup location			40	Y
Street	Street address of the COE pickup location			50	N
Postal Code	Post code of the COE pickup location			10	N
City	City of the COE pickup location			40	Y
Country	Country of the COE pickup location - 2-digit ISO code			2	Y
Region	Region of the COE pickup location - Country_Region. For example: US_NY			6	Y
Port of Exit	Port of exit - the transport management location id of the port through which the COE will be shipped			40	Y
Country of Port of Exit	The country of the port of exit - 2-digit ISO code. The country of the port of exit does not have to be the same as the country of the pickup location. For example: KOLKATA_PORT is the port of exit for Kathmandu			2	Y
Region of Port of Exit	Region of port of exit - Country_Region. Example: ML_BKO (Mali Bamako)			6	Y
Remarks	Provide any remarks or additional information to the MDM team to assist in the creation of the data				N
Defaulted Fields - Not in Template					
COE Pick-Up Location <b>Instructions</b>					

After filling out the form(s), please submit as instructed on the Umoja MDM site to [umoja-mdm@un.org](mailto:umoja-mdm@un.org).

## Chapter 10. Track & Trace using Carrier Collaboration Portal (CCP)/TM

### Summary

Once a **FO** is assigned, **Goods Vendors** and **Freight Forwarders** are required to access the **TM Carrier Collaboration Portal (CCP)**<sup>2</sup> and submit **events** and **documents** related to the order assigned to them. The **CCP** is a web-based portal used by the UN to facilitate more efficient communication and interaction with Vendors. It allows for external access of the **TM** system by vendors.

For vendors and freight forwarders who have been onboarded for **Electronic Data Interchange (EDI)**<sup>3</sup> for **TM**, they are not required to use **CCP**. They will receive the **FOs** from the UN automatically through **EDI** and they can in return, update all **events** and **documentation** for **FOs** directly through **EDI**.

It is the responsibility of the **Inbound Coordinator** to ensure that the **Goods Vendor/Freight Forwarder** update the **CCP** or the **EDI**.

In case the **Goods Vendor/Freight Forwarder** 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**.

### Expected and Unexpected Events

There are two types of **events** that must be reported on within the **CCP**:

1. They are the **Expected Events** (a.k.a. Planned Events) and **Unexpected Events**.
2. **Expected Events** (Loading Begin, Loading End, Departure, Arrival at Destination, etc.) are pre-populated in the **CCP** for each **FO**.

**Unexpected Events** (damage or loss of goods, delay, route change, freight cost change, quality issues, other) are indicated within the **CCP** by the **vendors**. This will alert the UN in case of any unforeseen changes or incidents that affect the process.

### Who should use the CCP?

For all DAP Incoterm movements, the **Goods Vendor** is responsible to update all **Expected Events** and submit any **Unexpected Events** associated with the movements in **CCP**. This will reflect directly in **TM**.

For all non-DAP Incoterm movements, for the goods vendor legs till handover location, it is still the responsibility of the **Goods Vendor** to update all **Expected Events** and submit any **Unexpected Events** associated with the specific **FOs** in **CCP**. For the legs from and after the handover location, it is the responsibility of the freight forwarder to update all **Expected Events** and submit any **Unexpected Events** associated with the specific **FOs** in **CCP**.

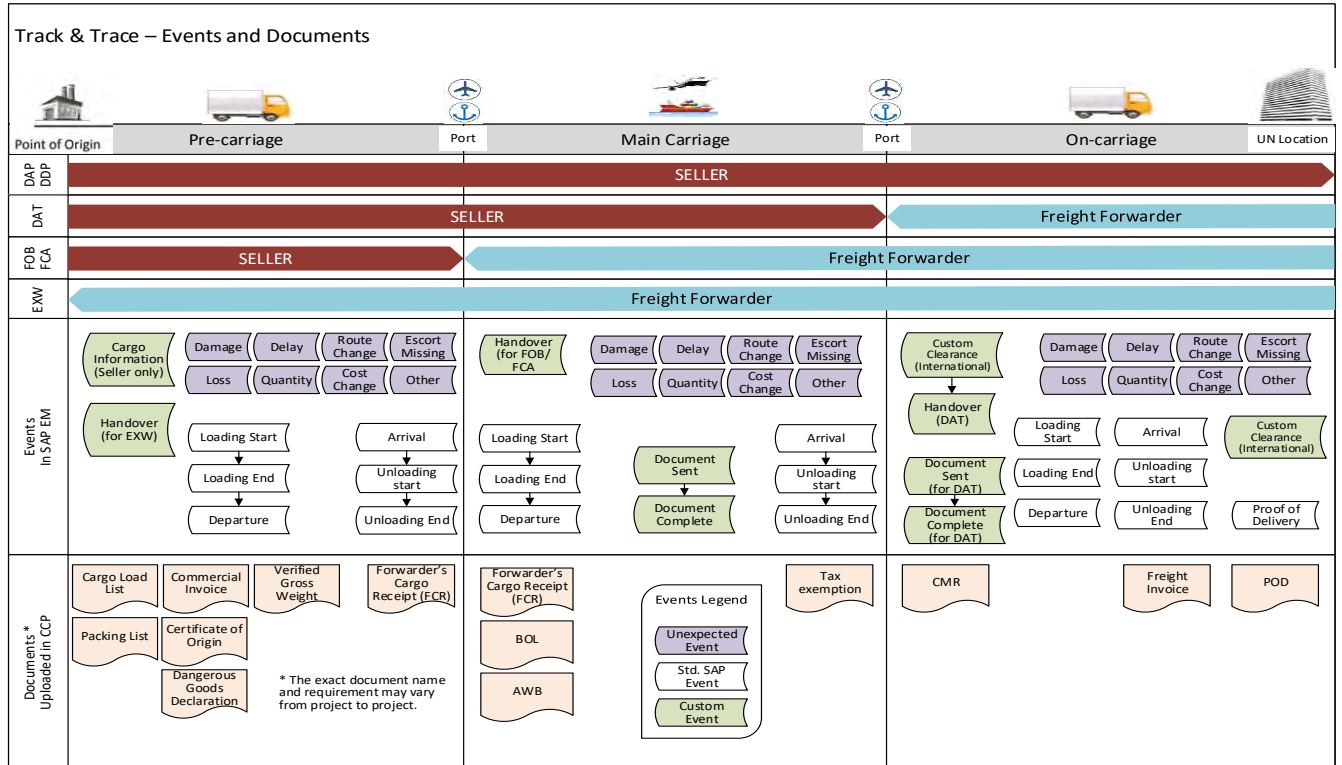
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<sup>2</sup> To learn more about using CCP, refer to the Information Packs available in <https://umoja.un.org/CCP>. In case the goods vendor/freight forwarder cannot connect to CCP, Umoja role "TS.01 TM Planner and TS.02 Manage Freight Orders" can update the related events/attachments directly in the TM module. These Events/Attachments are also displayed in CCP.

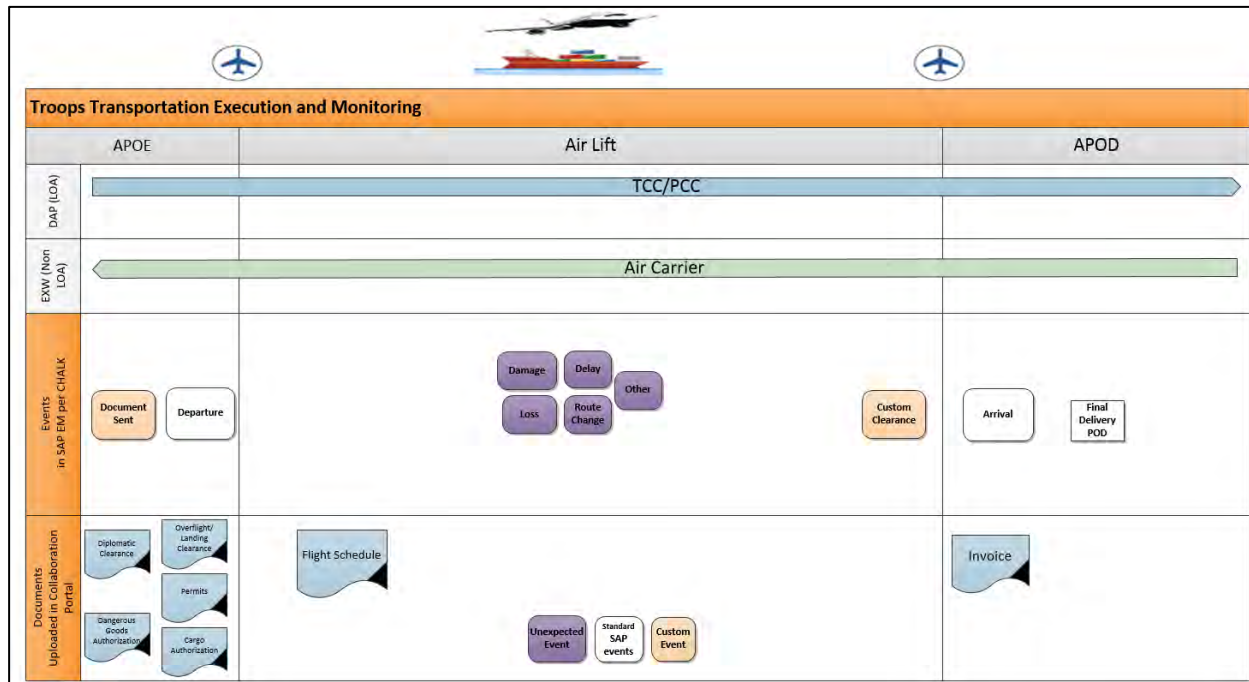
<sup>3</sup> [https://umoja.un.org/sites/umoja.un.org/files/umoja\\_job\\_aid\\_-\\_tm\\_electronic\\_data\\_interchange\\_edi\\_v2.pdf](https://umoja.un.org/sites/umoja.un.org/files/umoja_job_aid_-_tm_electronic_data_interchange_edi_v2.pdf)

## Event and Document Requirements in CCP

Each **event** shall be reported by the **Goods Vendor/Freight Forwarder**. All supporting **documentation** can be added as an attachment in the **Attachment** section of the **CCP**. All event updates and attachments are visible in **TM** automatically. Example of attachments could be packing list, commercial invoice, certificate of origin, dangerous goods MSDS documents, and cargo load list. The **Goods Vendor/Freight Forwarder** can also add “notes” for communication directly with the UN. The exact list of **Track & Trace Events and Documents** for cargo shipments is indicated in the flowchart below:



The list of **Track & Trace Events and Documents** for troop movements is indicated in the flowchart below:

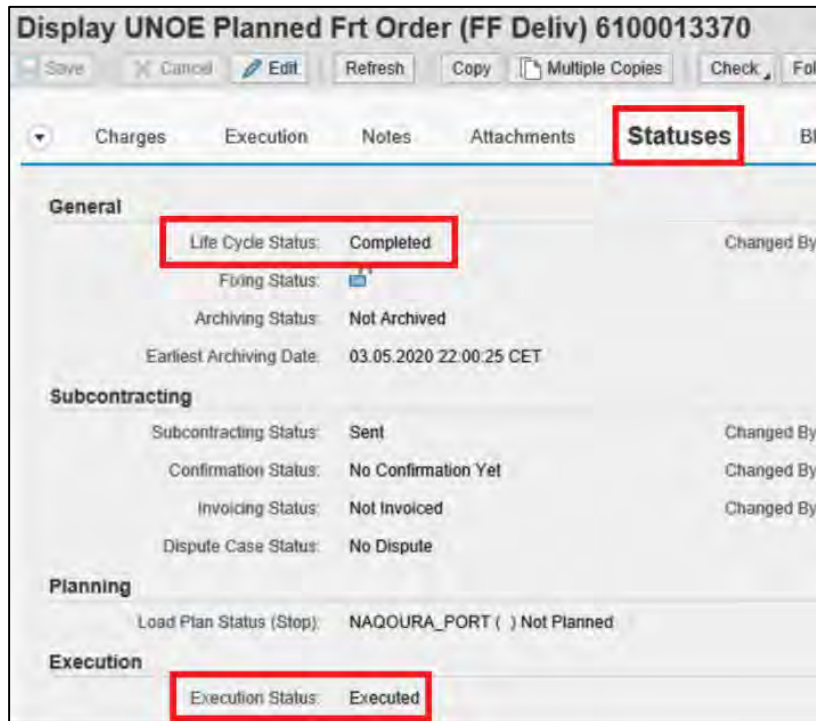


At the handover location, it is the responsibility of the **Freight Forwarder** to update the **Handover** event in **CCP** which implies that the **Goods Vendor** has handed the shipment over to the **Freight Forwarder**. This event is critical for the **Virtual Goods Receipt** (refer to **SR2.2.2**). Once the **events** and **documents** have been submitted for a **FO** which also has the **Handover** event and the UN received the shipment, the **Inbound Coordinator** or the **Virtual Direct Receiving user** (depending on how the entity is organized) should update the **Document Complete Event**<sup>4</sup>.

If unexpected events and major events, such as handover location events, are submitted for **FOs**, the **TM** system sends automated notifications to the responsible contact (**TM Planner/Inbound Coordinator/TM Manage Freight Order**). **Events** in **TM** are set up by function. The **TM Planner** would be notified about all unexpected events while the **TM Manage Freight Order** only receives unexpected event notifications mainly related to cost/route changes. The event notification is set up for generic email IDs based on different **TM** roles (by entity or function).

The submission of **events** has impact on the **Freight Order status** in **TM**. Events submitted such as loading begin/loading end do not change the **FO** status in **TM**. Departure/Arrival events do change the **FO** status to **"in Execution"** and the **Freight Order cannot be deleted** anymore, and certain changes are **not** possible anymore. The event **"Proof of Delivery" (POD)** is an expected event on the last **FO** of a shipment/movement. As soon as the **POD** is submitted the status of the **FO** changes to **"executed"** and the shipment/movement is finalized/completed. In case there are further **FOs** belonging to the same shipment a batch job will run over night and set all **FOs** belonging to the same shipment to **"completed"** on the **Life Cycle** status. The execution status for these pre-and main-carriage **FOs** will not get updated through the batch job

<sup>4</sup> The Document Complete is an event in CCP/TM which when reported, implies that the Inbound Coordinator /Receiving user has received all the relevant documentation for that shipment in order to proceed with the ECC virtual / physical goods receipt.



## Access to CCP

Once a goods and freight (if required) contract has been awarded, a **Procurement Division (PD)** (for global or systems contracts) or **Procurement Section (PS)** (for local freight forwarders) focal point will:

1. Contact the vendor(s) if it is a new goods vendor/freight forwarder, to ensure that the goods vendor/ freight forwarder has access to **CCP**.
2. Provide the necessary **CCP** details as required, to indicate they can find instructions and training for the use of **CCP** (<https://umoja.un.org/CCP>).
3. Provide the **Inbound Coordinator** with the contact details of the vendor's **CCP** focal points.

For global or systems contracts, if the **Goods Vendor/Freight Forwarder** does not have access to **CCP**, the **PD** will reach out to the vendor/freight forwarder to fill information of two or more focal points. **PD** will then request for **CCP** access through an [InfoPath Form](#)<sup>5</sup> wherein Unite IDs and individual **Business Partner (BP)** numbers will be created for the external partners. **PD** will maintain correct contact details (**CCP** access) for all global goods vendors.

For local freight forwarders/local, regional goods contracts, if the **Goods Vendor/Freight Forwarder** does not have access to **CCP**, the local **PS** focal point will reach out to the **Goods Vendor/Freight Forwarder** to fill information of two or more focal points. Local **PS** will then request for **CCP** access through an [InfoPath Form](#) wherein **Unite IDs** and individual **BP numbers** will be created for the external partners.

Detailed guidance on this is provided in Umoja Job Aid [Requesting TM Master Data](#).<sup>6</sup>

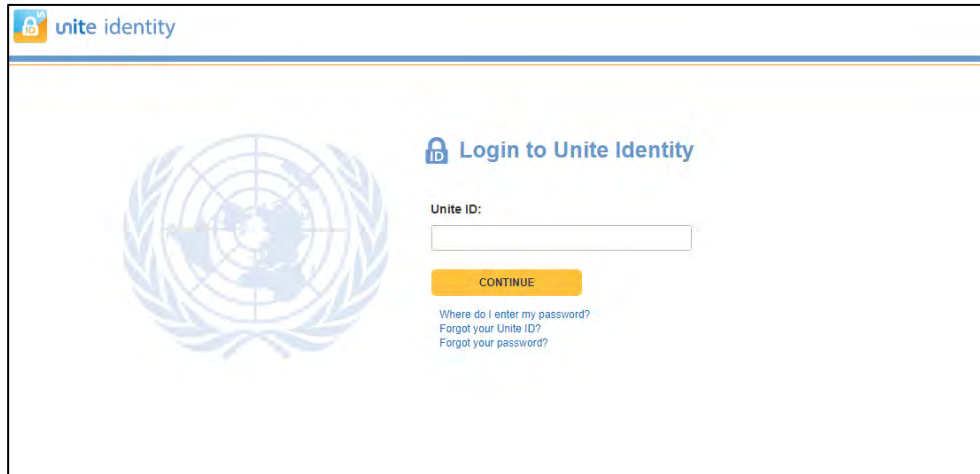
<sup>5</sup> To find the InfoPath form, visit [https://iseek.un.org/departamental\\_page/master-data-maintenance-0](https://iseek.un.org/departamental_page/master-data-maintenance-0) and select InfoPath form in the "Transportation Management - contact person" section.

<sup>6</sup> [https://umoja.un.org/sites/umoja.un.org/files/umoja\\_job\\_aid\\_-\\_requesting\\_tm\\_master\\_data\\_-\\_december\\_2019.pdf](https://umoja.un.org/sites/umoja.un.org/files/umoja_job_aid_-_requesting_tm_master_data_-_december_2019.pdf)

## How can events, documents, notes be submitted / uploaded in CCP?

**Note that the below instructions are for vendors (goods vendors and freight forwarders) and not UN personnel**

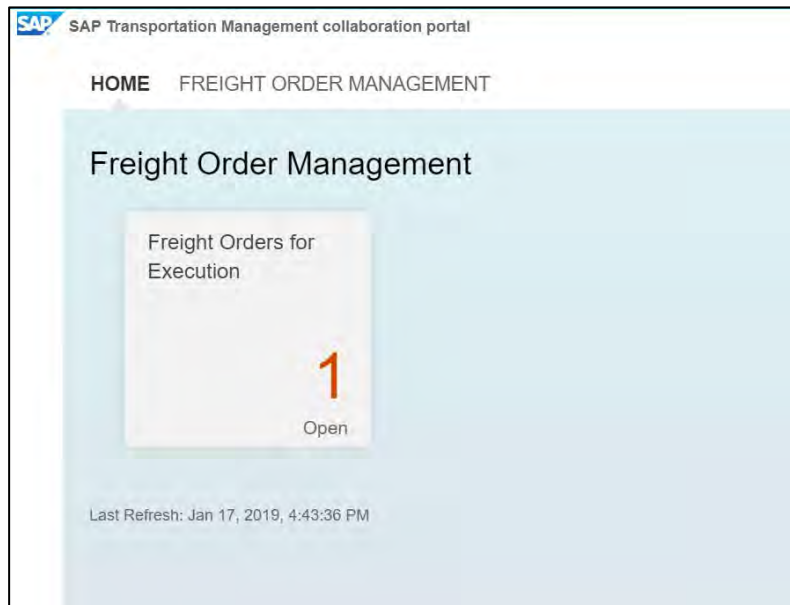
Click on the following Link: <https://gwp.umoja.un.org/ccp>



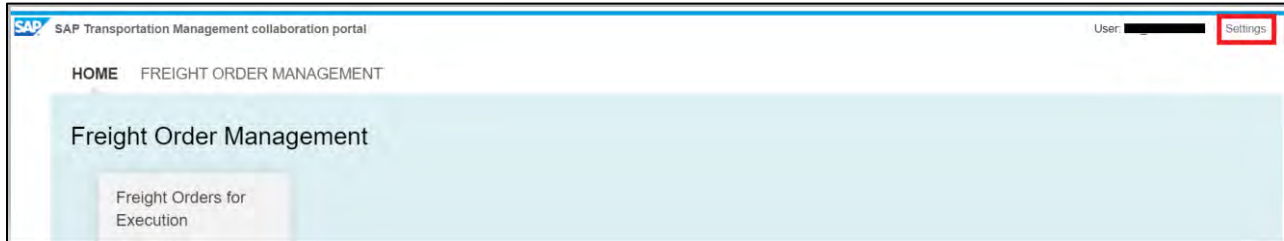
Please use your **Unite Username** and your **Unite Password** to log into the system.

In case you have problems accessing the system, kindly refer to the Troubleshooting section of this document.

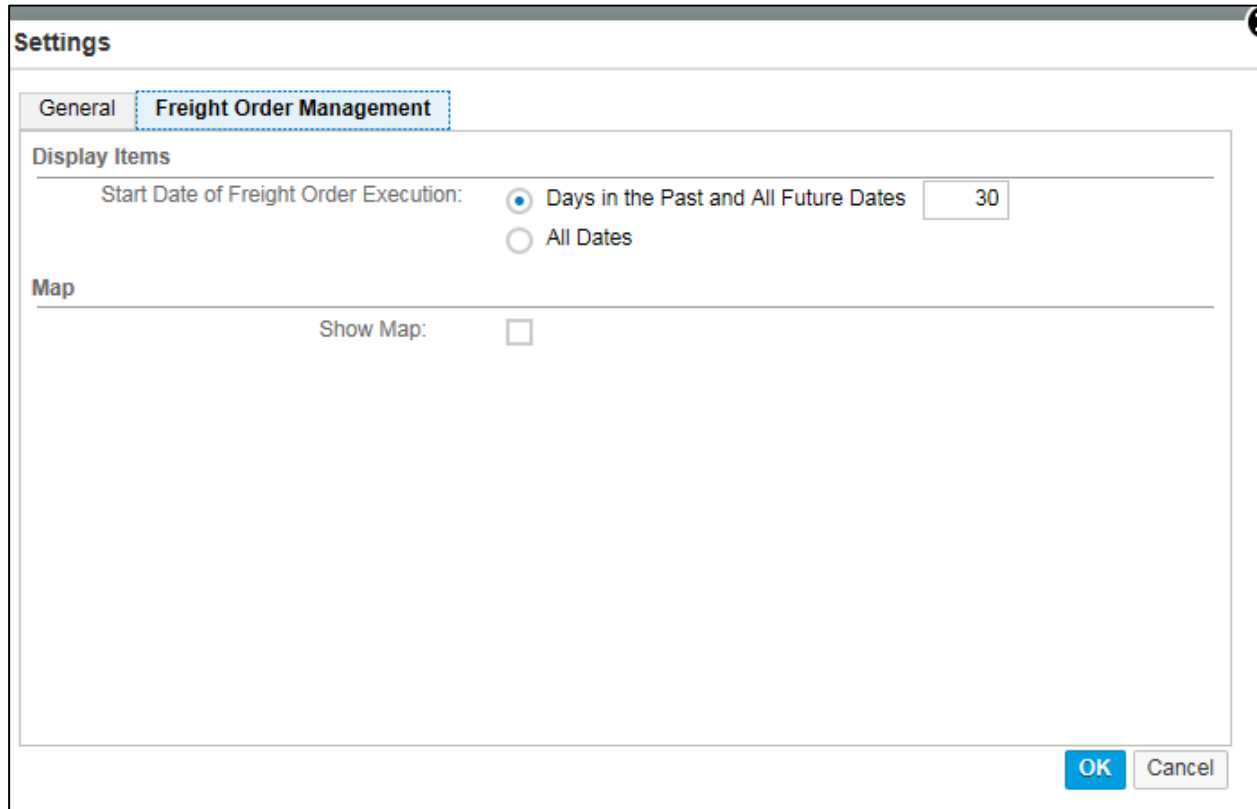
Once you have successfully logged in, you will be directed to the CCP Home Page which will provide you with the number of Open Freight Order assigned to your company. (See example below).



By clicking the FREIGHT ORDER MANAGEMENT tab, you will be provided by a list of Open Freight Orders. If not all Freight Orders are shown as expected, please check the settings:



Click on 'Settings' on the main/home CCP screen.



Click on the 'Freight Order Management' screen. Change the 'Days in the Past and All Future Dates' to a larger number than 30 or choose the option below 'All Dates'.



**Settings**

General **Freight Order Management**

**Display Items**

Start Date of Freight Order Execution:  Days in the Past and All Future Dates   All Dates

**Map**

Show Map:

**OK** **Cancel**

Confirm with 'Ok'.

Now all open Freight Orders show under 'Freight Orders for execution'. If there are still Freight Orders missing in the overview, please reach out to the UN.

SAP Transportation Management collaboration portal

HOME **FREIGHT ORDER MANAGEMENT**

**Freight Orders for Execution**

Confirm Next  Quick Filter: **Open** Closed Canceled Blocked All View:

Status	Freight Order	Next Open Event	Source Location	Destination Location	Start Date/Time	Goods PO
	6100010750	Loading Begin At RENAULT TRUCKS SAS On February 14, 2019 at 5:05 PM CET	RENAULT TRUCKS SAS Saint-Priest France	Le Havre-Port Le Havre Seine-Mantime France	February 14, 2019 5:05 PM CET	2200102135

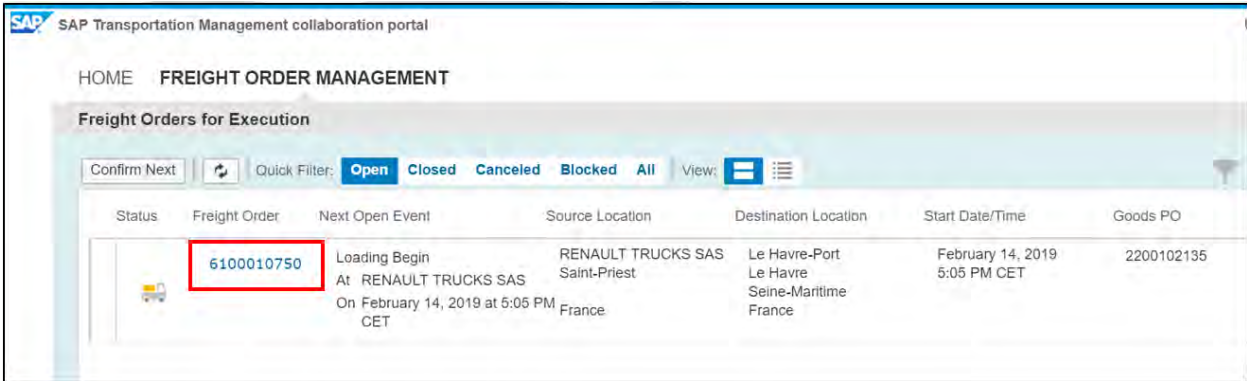
You can view Closed, Cancelled, Blocked or All Freight Orders by clicking on the appropriate tab at the top. You could also search for records by Freight Purchase Order or any other fields listed in table.

HOME **FREIGHT ORDER MANAGEMENT**

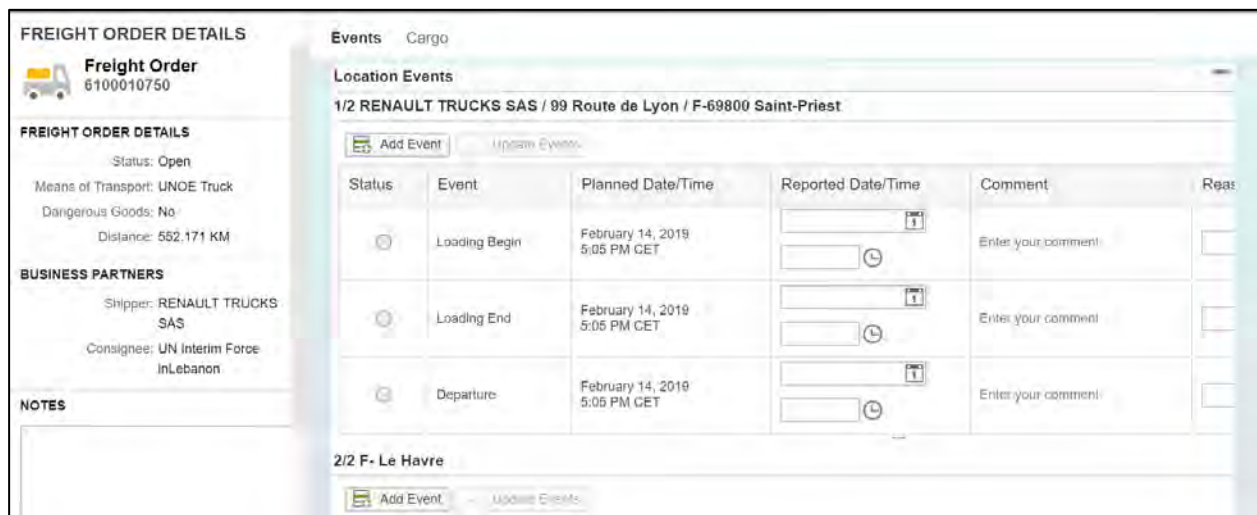
**Freight Orders for Execution**

Confirm Next  Quick Filter: **Open** Closed Canceled Blocked All View:

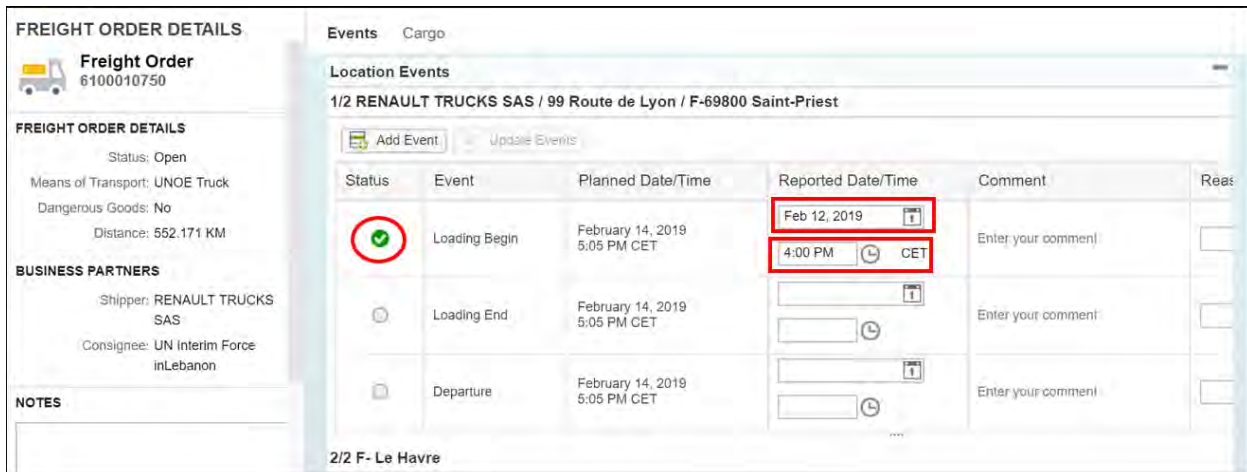
By clicking on the actual Freight Order Number, you will be able to see all the details pertaining to the Freight Order and manage the documentation and events associated to it.



In the detailed view you can see list of planned events due for that freight order at their respective locations.



You can view and then report the event due, by entering date/time & comment (if desired) and clicking on UPDATE EVENTS. Make sure the time is entered in the required format. Reported event will turn green as shown below.



You could also report Damage, Delay, Loss etc. which are referred to as Unexpected Events under 'Tour Events', provide comments regarding the event and upload supporting document as shown in

the next step. The button to “Confirm” an unexpected event will be enabled once all the information is typed into the respective text boxes.

The screenshot shows a web interface for a freight order. On the left, there are sections for 'FREIGHT ORDER DETAILS', 'BUSINESS PARTNERS', and 'NOTES'. The main area is titled 'Events' and 'Cargo'. A modal dialog box titled 'Add Unexpected Event for Freight Order 6100010750' is open. It contains the following fields:

- Event:** A dropdown menu with 'Damage' selected.
- Reported:** A date and time picker showing 'Feb 3, 2019' at '2:00 PM' in 'CET'.
- Comment:** A text input field containing 'Damaged product collected-picture attached'.

At the bottom of the dialog box, there are two buttons: 'Confirm' (highlighted with a red box) and 'Cancel'.

You can also upload attachments like handover documents, proof of delivery etc. which need to be provided to the UN. Select the file in your system and click on UPLOAD.

The screenshot shows the same web interface as the previous one, but now the 'Attachments' section is visible. It contains a table with the following data:

Type	File Name	Last Changed By	Last Changed On	Delete
	Test Document.pdf	TM [redacted]	January 17, 2019 at 11:...	

Below the table, there are two buttons: 'Browse...' and 'Upload' (highlighted with a red box).

The external partner can submit notes to the UN by typing a message in the field below the “Notes”.

After text was entered in the notes the “Add Note” option appears on the lower right.

Click “Add Note” and the message appears on the “Notes” tab in TM as well as in the CCP itself.

For further information and detailed step by step instructions on how to use the CCP, kindly refer to the CCP Training videos directly at the UCS Training Team [YouTube](https://www.youtube.com/channel/UC...) Channel. All CCP Training Material can be accessed here: <https://umoja.un.org/CCP>

## How is CCP connected to TM?

All details updated in CCP including events, attachments and notes will be automatically reflected in the TM system. This update occurs real time for the corresponding freight orders and will be visible to all TM roles (including display roles).

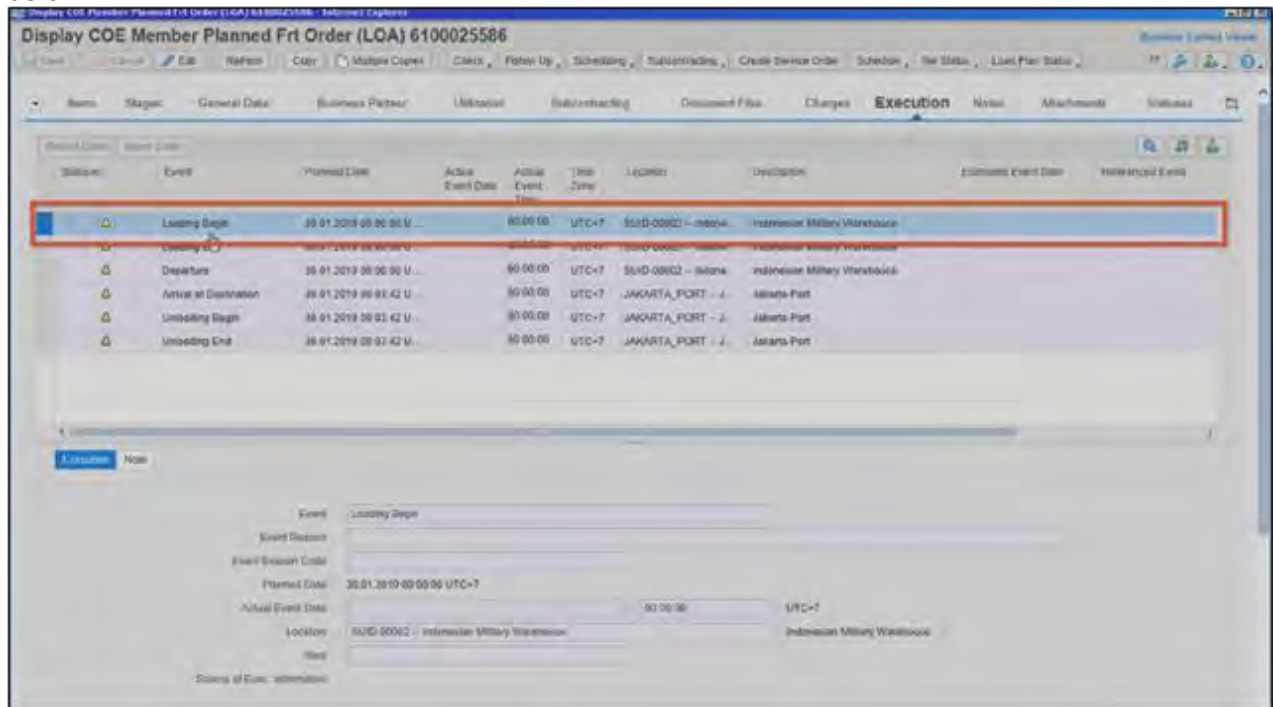
## How can events, documents, notes be submitted / uploaded in TM?

In case the goods vendor/freight forwarder does not have access to CCP, the **TM Planner and TM Manage Freight Order** role (TS.01/TS.07/TS.10 and TS.02/TS.08/TS11 Umoja role) can update events, documents and notes directly in the TM system on behalf of the vendor.

Ideally, all expected events are submitted in a timely manner so that all stakeholders can track the shipment/movement in TM and/or BI. As described above certain events change the status of the FO in TM. If a departure event is submitted, the FO status changes to 'in execution' and the FO cannot be deleted anymore. Similarly, the Proof of Delivery (POD) event on the last leg of a shipment/movement closes the FO. Afterwards, the shipment is considered completed and no changes can be made anymore. All other legs belonging to the same shipment (with POD event) are closed overnight through a batch job.

### Recording an Expected Event

For the specific freight order, navigate to the Execution Tab. Let us take the example of submitting the first expected event i.e. Loading Begin. Select the event by clicking on the grey box as indicated below.



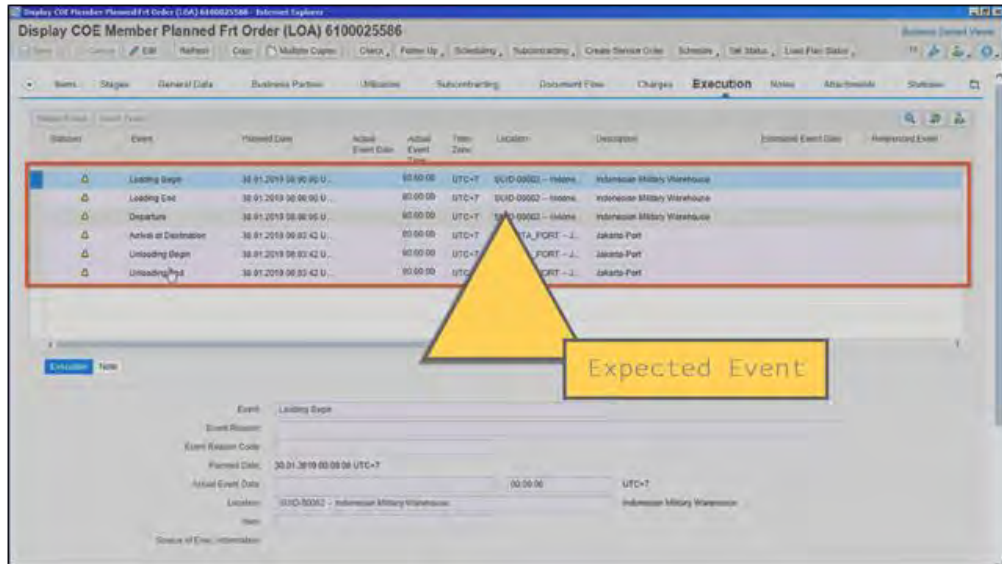
The screenshot displays the 'Execution' tab for a freight order (LOA) 6100025586. The table below shows the event schedule:

Event	Planned Date	Actual Event Date	Time Zone	Location	Description
Loading Begin	30.01.2019 00:00:00 U...	30.01.19	UTC+7	SUD-0902 - Indone...	Indonesia Military Warehouse
Loading End	30.01.2019 00:00:00 U...		UTC+7	SUD-0902 - Indone...	Indonesia Military Warehouse
Departure	30.01.2019 00:00:00 U...	30.01.19	UTC+7	SUD-0902 - Indone...	Indonesia Military Warehouse
Arrival at Destination	30.01.2019 00:00:00 U...	30.01.19	UTC+7	JAKARTA_PORT - J...	Jakarta Port
Unloading Begin	30.01.2019 00:00:00 U...	30.01.19	UTC+7	JAKARTA_PORT - J...	Jakarta Port
Unloading End	30.01.2019 00:00:00 U...	30.01.19	UTC+7	JAKARTA_PORT - J...	Jakarta Port

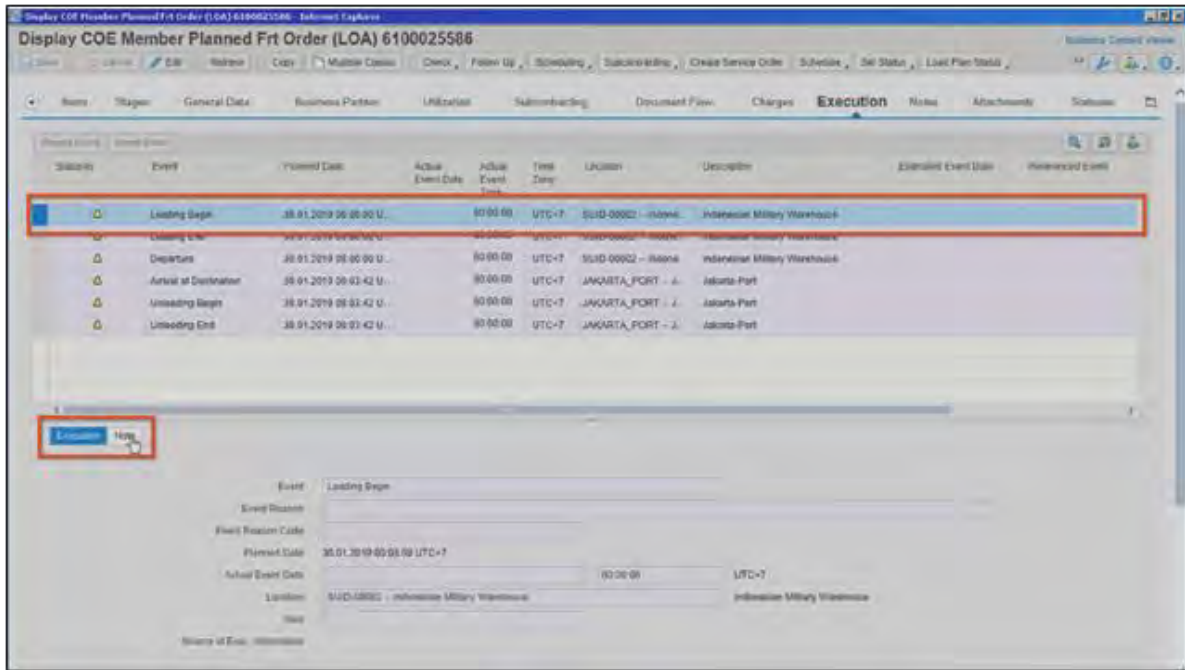
Below the table, the details for the selected 'Loading Begin' event are shown:

- Event: Loading Begin
- Event Reason: [Empty]
- Event Reason Code: [Empty]
- Planned Date: 30.01.2019 00:00:00 UTC+7
- Actual Event Date: [Empty]
- Location: SUD-0902 - Indonesia Military Warehouse
- Time Zone: UTC+7

The yellow triangle beside the event indicates that it's an Expected Event.



Once selected, one can either insert some information in the **Execution** tab or insert some **Notes** at the **Notes** tab.



To make any changes, click on the **Edit** button located at the top of this screen.

Display COE Member Planned Frt Order (LOA) 6100025586 - Informant Explorer

Display COE Member Planned Frt Order (LOA) 6100025586

Refresh | Cancel | Multiple Copies | Check | Follow Up | Scheduling | Subcontracting | Create Service Order | Schedule | Get Status | Load Plan Status

Items | Stages | General Data | Business Partner | Utilization | Subcontracting | Document Flow | Charges | Execution | Notes | Attachments | Database

Status	Event	Planned Date	Actual Event Date	Actual Event Time	Time Zone	Location	Description	Estimated Event Date	Released Event
	Loading Begin	30.01.2019 06:00:00 U...		06:00:00	UTC+7	SUD-0902 - Indonesia	Indonesia Military Warehouse		
	Loading End	30.01.2019 06:00:00 U...		06:00:00	UTC+7	SUD-0902 - Indonesia	Indonesia Military Warehouse		
	Departure	30.01.2019 06:00:00 U...		06:00:00	UTC+7	SUD-0902 - Indonesia	Indonesia Military Warehouse		
	Arrival at Destination	30.01.2019 06:03:42 U...		06:00:00	UTC+7	JAKARTA_PORT - J...	Jakarta Port		
	Unloading Begin	30.01.2019 06:03:42 U...		06:00:00	UTC+7	JAKARTA_PORT - J...	Jakarta Port		
	Unloading End	30.01.2019 06:03:42 U...		06:00:00	UTC+7	JAKARTA_PORT - J...	Jakarta Port		

Execution

Event: Loading Begin

Event Reason:

Event Reason Code:

Planned Date: 30.01.2019 06:00:00 UTC+7

Actual Event Date:  06:00:00 UTC+7

Location: SUD-0902 - Indonesia Military Warehouse

Source of Exec. Information:

Add a Reason for the event (**Event Reason**) if desired. This is especially useful for delays etc:

Edit COE Member Planned Frt Order (LOA) 6100025586 - Informant Explorer

Edit COE Member Planned Frt Order (LOA) 6100025586

Save | Cancel | Multiple Copies | Check | Follow Up | Scheduling | Subcontracting | Create Service Order | Schedule | Get Status | Load Plan Status

Items | Stages | General Data | Business Partner | Utilization | Subcontracting | Document Flow | Charges | Execution | Notes | Attachments | Database

Status	Event	Planned Date	Actual Event Date	Actual Event Time	Time Zone	Location	Description	Estimated Event Date	Released Event
	Loading Begin	30.01.2019 06:00:00 U...		06:00:00	UTC+7	SUD-0902 - Indonesia	Indonesia Military Warehouse		
	Loading End	30.01.2019 06:00:00 U...		06:00:00	UTC+7	SUD-0902 - Indonesia	Indonesia Military Warehouse		
	Departure	30.01.2019 06:00:00 U...		06:00:00	UTC+7	SUD-0902 - Indonesia	Indonesia Military Warehouse		
	Arrival at Destination	30.01.2019 06:03:42 U...		06:00:00	UTC+7	JAKARTA_PORT - J...	Jakarta Port		
	Unloading Begin	30.01.2019 06:03:42 U...		06:00:00	UTC+7	JAKARTA_PORT - J...	Jakarta Port		
	Unloading End	30.01.2019 06:03:42 U...		06:00:00	UTC+7	JAKARTA_PORT - J...	Jakarta Port		

Execution

Event: Loading Begin

Event Reason:

Event Reason Code:

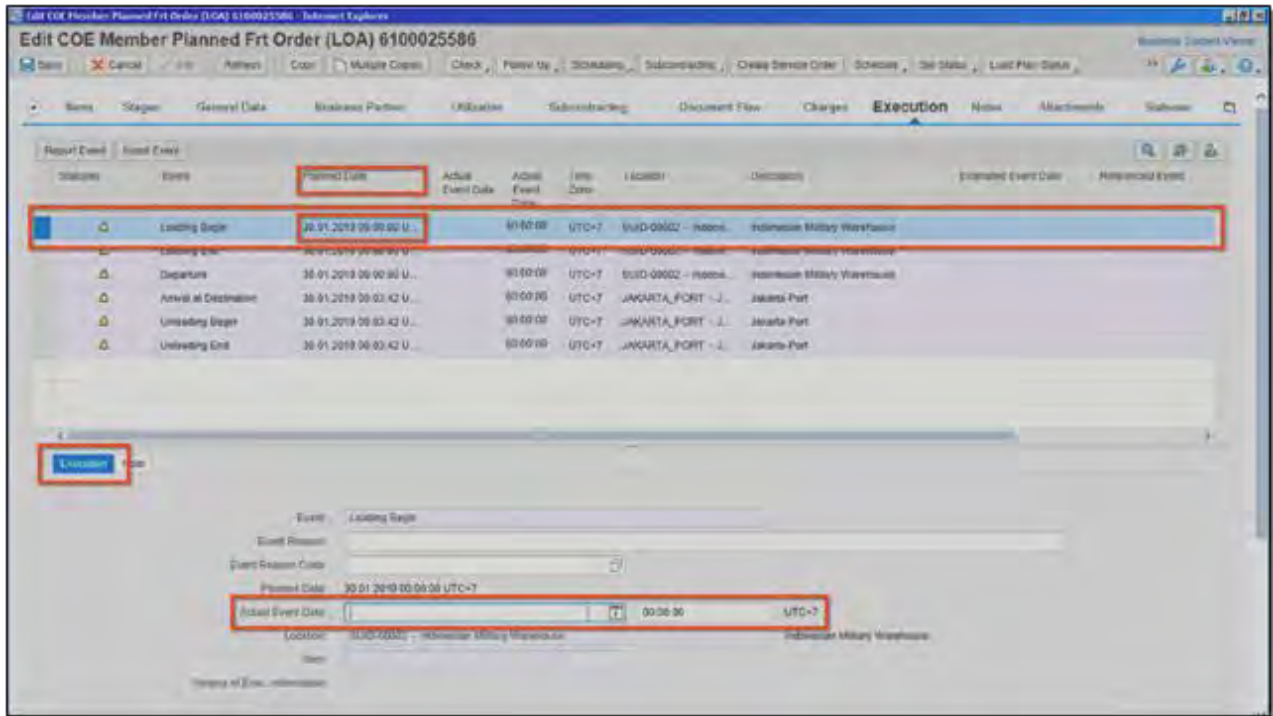
Planned Date: 30.01.2019 06:00:00 UTC+7

Actual Event Date:  06:00:00 UTC+7

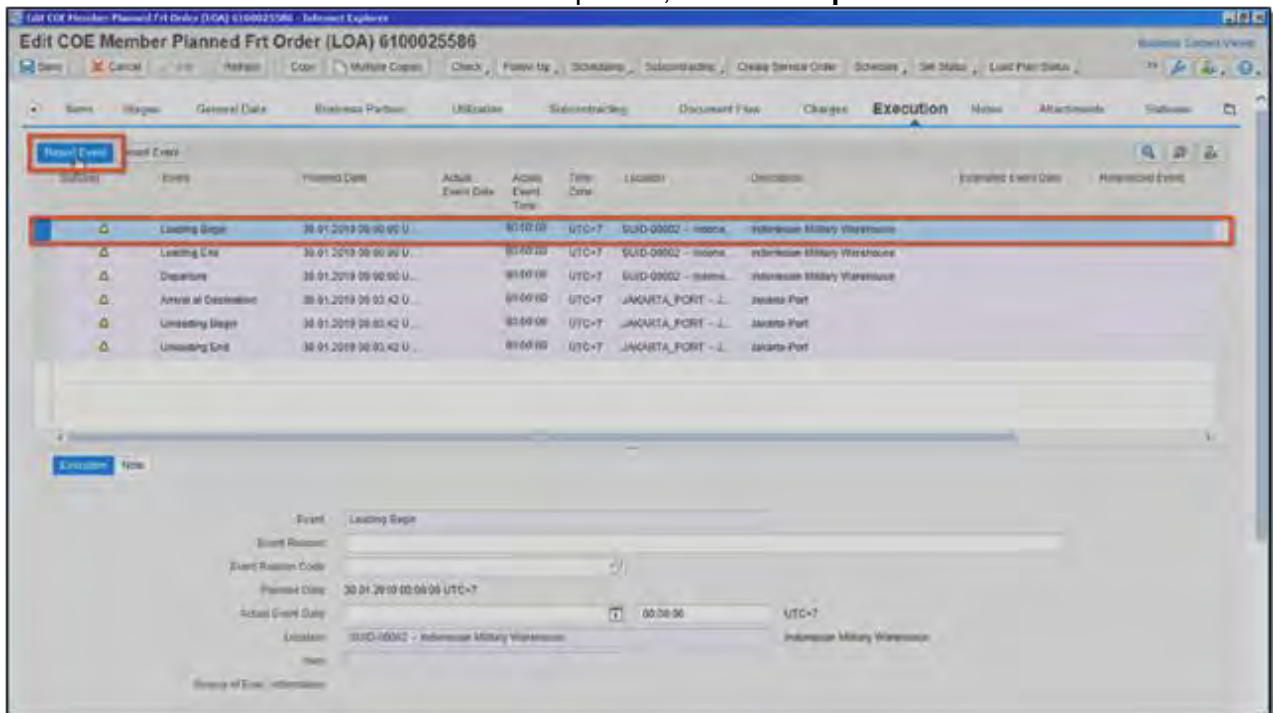
Location: SUD-0902 - Indonesia Military Warehouse

Source of Exec. Information:

Please fill the **Actual Event Date**. This is the date when the event took place. The **Actual Event Date** is later compared in reporting against the **Planned Date** for performance evaluation.

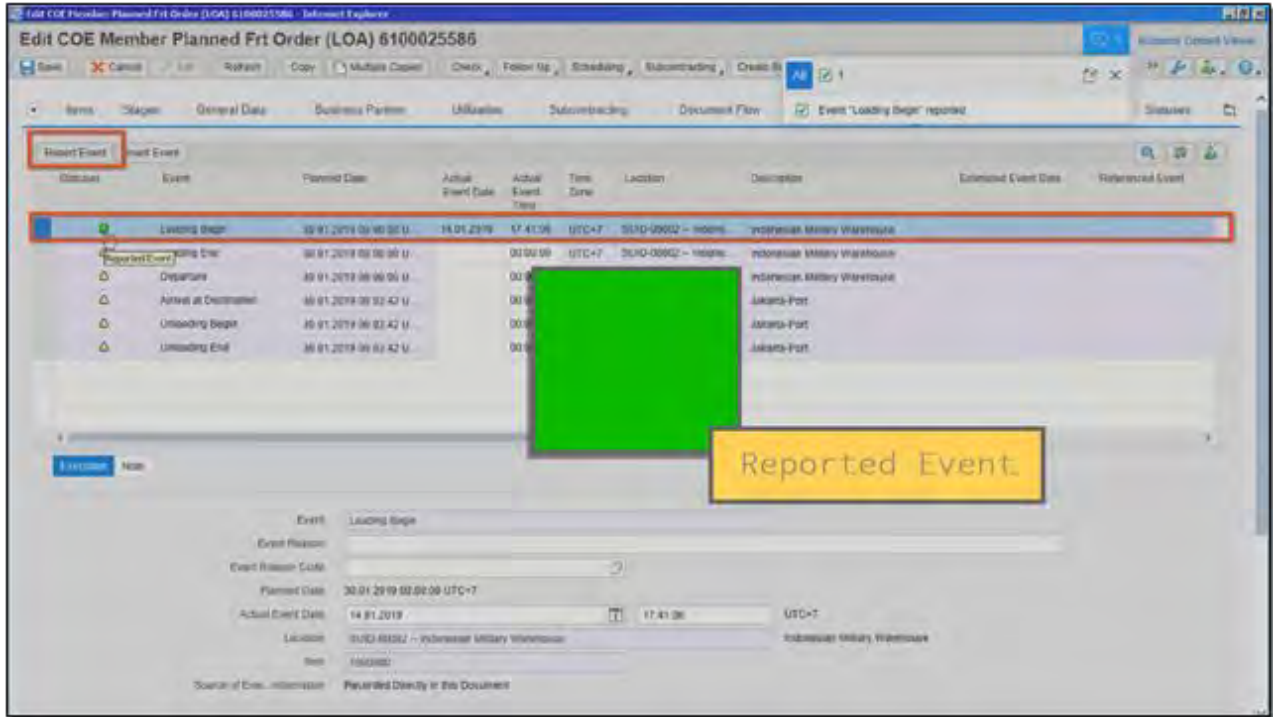


If the dates and times concur to what is expected, click on Report Event.

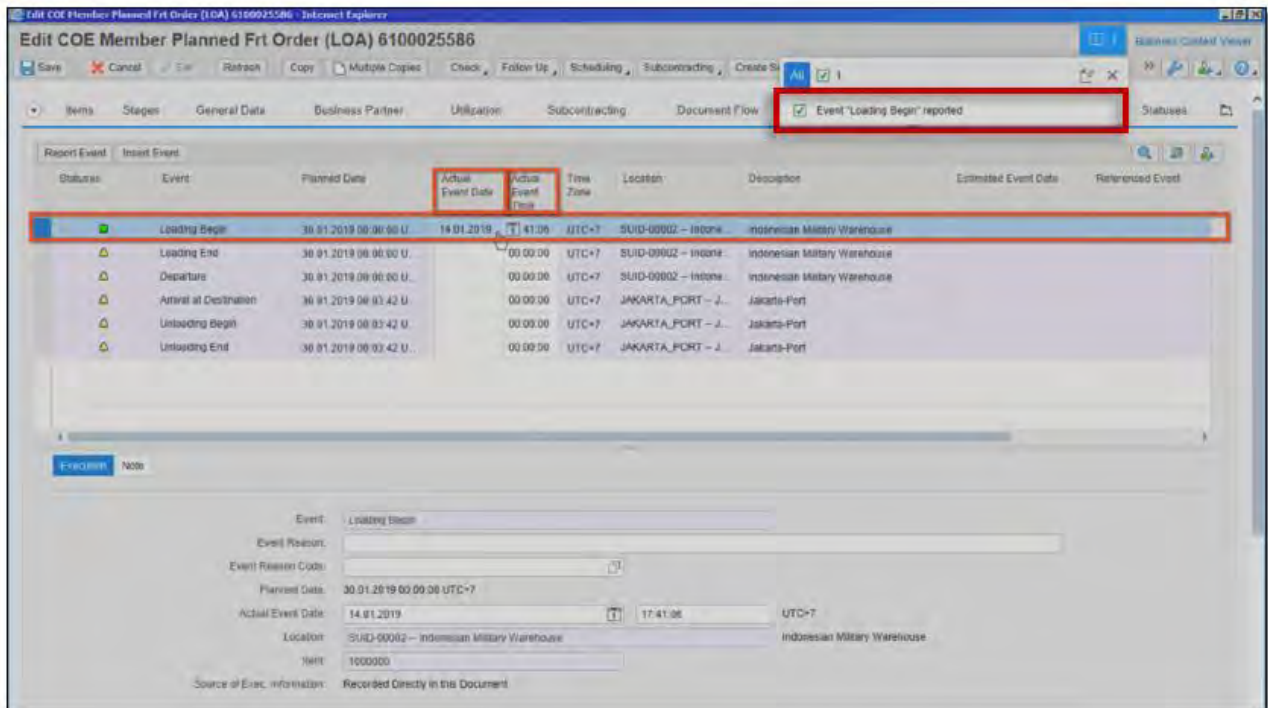


Once reported, the system will automatically change the status of this event, here, to a Green Square that implies it is a Reported Event.





Now, the **Actual Event Date** and the **Actual Event Time**, will appear on the screen as well as a message to the right top corner of the screen that displays: **Event "Loading Begin" reported.** Press **SAVE** on the upper left to save the event submission.



## Checking/Inserting Notes

Notes submitted from external partners through CCP are displayed in TM on the “Notes” tab. Please note, that these messages do not trigger a notification to UN staff. Besides the message content the username who submitted the message and date/time are visible.

Display COE UN Planned Frt Order (non-LOA) 6100028421

Save Cancel Edit Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting Create Service Order

Execution **Notes** Attachments Statuses Blocking Information Document References Administration

Text Type	Language	Internal Text	Content	Created By	Created On Date/Time
Nature of Goods	English		non critical note to UN; no notification sent	TM	15 09 2020 22.21 36 CET

UN staff can also enter generic notes in TM directly. To insert a message visible in CCP, please click on “Edit” and then on “Insert”.

Edit COE UN Planned Frt Order (non-LOA) 6100028421

Save Cancel **Edit** Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting

Execution **Notes** Attachments Statuses Blocking Information Document References

**Insert**

Text Type	Language	Internal Text	Content
Nature of Goods	English		non critical note to UN; no notification sent

Enter “Text Type” and “Content”. Do not mark the “Internal Text” if the message should appear in CCP.

Edit COE UN Planned Frt Order (non-LOA) 6100028421

**Save** Cancel Edit Refresh Copy Multiple Copies Check Follow Up Scheduling Subcontracting Create S

Execution **Notes** Attachments Statuses Blocking Information Document References

**Insert**

Text Type	Language	Internal Text	Content
Nature of Goods	English		non critical note to UN; no notification sent
<b>Remarks</b>	English		<b>Generic note visible to external partner in CCP</b>

When complete, press “Save”.

The same note with information on user/date/time is visible in CCP.

**FREIGHT ORDER DETAILS**  
6100028421

**FREIGHT ORDER DETAILS**  
Status: Open  
Means of Transport: COE Truck  
Dangerous Goods: No  
Distance: 69.063 KM

**BUSINESS PARTNERS**  
Shipper: PM OF FED. DEMOC REP. OF NEPAL TO UN  
Consignee: UN Interim Force in Lebanon

**NOTES**  
02PLCOEPS02 02PLCOEPS02: September 15, 2020 at 11:01 PM CET:  
Generic note visible to external partner in CCP

**Events** Cargo

**Location Events**  
1/2 UNODC POLBN / Arab African International Bank Bldg / 20115211 Beirut

Add Event Update Events

Status	Event	Planned Date/Time	Reported Date/Time	Comment
✓	Loading End	October 7, 2019 7:00 AM LBANON	Sep 14, 2019 12:00 AM LBANON	started
✓	Departure	October 7, 2019 7:00 AM LBANON	Oct 8, 2019 11:00 AM LBANON	slight delay as discussed
⚠	Handover Document	October 7, 2019 5:00 AM LBANON		Enter your comment
⊞	Loading Begin	October 7, 2019 7:00 AM LBANON		Enter your comment
⚠	Document Sent	October 8, 2019 7:00 AM LBANON		Enter your comment
⊞	Document Complete	October 9, 2019 7:00 AM LBANON		Enter your comment

Additionally, UN staff can enter internal notes, connected to a specific event. These notes are not visible in CCP.

To **insert** an internal **Note** connected to an event, go to the “Execution” tab, mark the relevant event line and click first on the **Note** tab (in the lower left part of the screen) and then click on **Insert**.

Edit COE Member Planned Frt Order (LOA) 6100025586

Execution

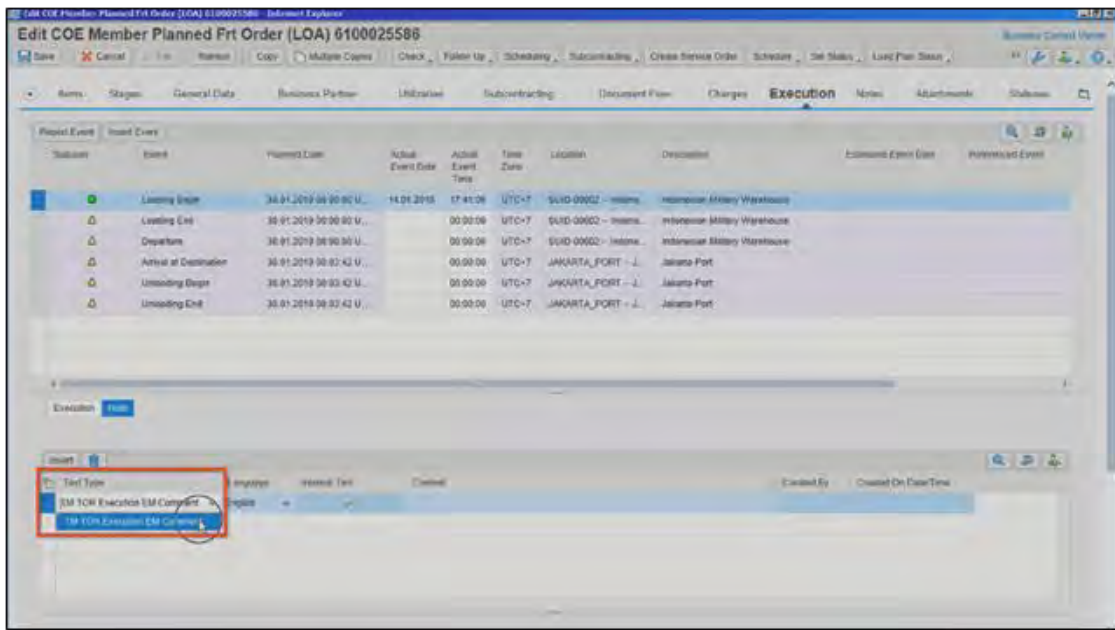
Status	Event	Planned Date	Actual Event Date	Actual Event Time	Time Zone	Location	Description	Estimated Event Date	Reported Event
✓	Loading Begin	30-01-2019 06:00:00 U...	14-01-2019	17:41:56	UTC+7	INDO	Indonesian Military Warehouse		
⚠	Loading End	30-01-2019 06:00:00 U...				INDO	Indonesian Military Warehouse		
⚠	Departure	30-01-2019 06:00:00 U...				INDO	Indonesian Military Warehouse		
⚠	Arrival at Destination	30-01-2019 06:03:42 U...				TA_PCRT	Jakarta Port		
⚠	Unloading Begin	30-01-2019 06:03:42 U...				TA_PCRT	Jakarta Port		
⚠	Unloading End	30-01-2019 06:03:42 U...				TA_PCRT	Jakarta Port		

Reported Event

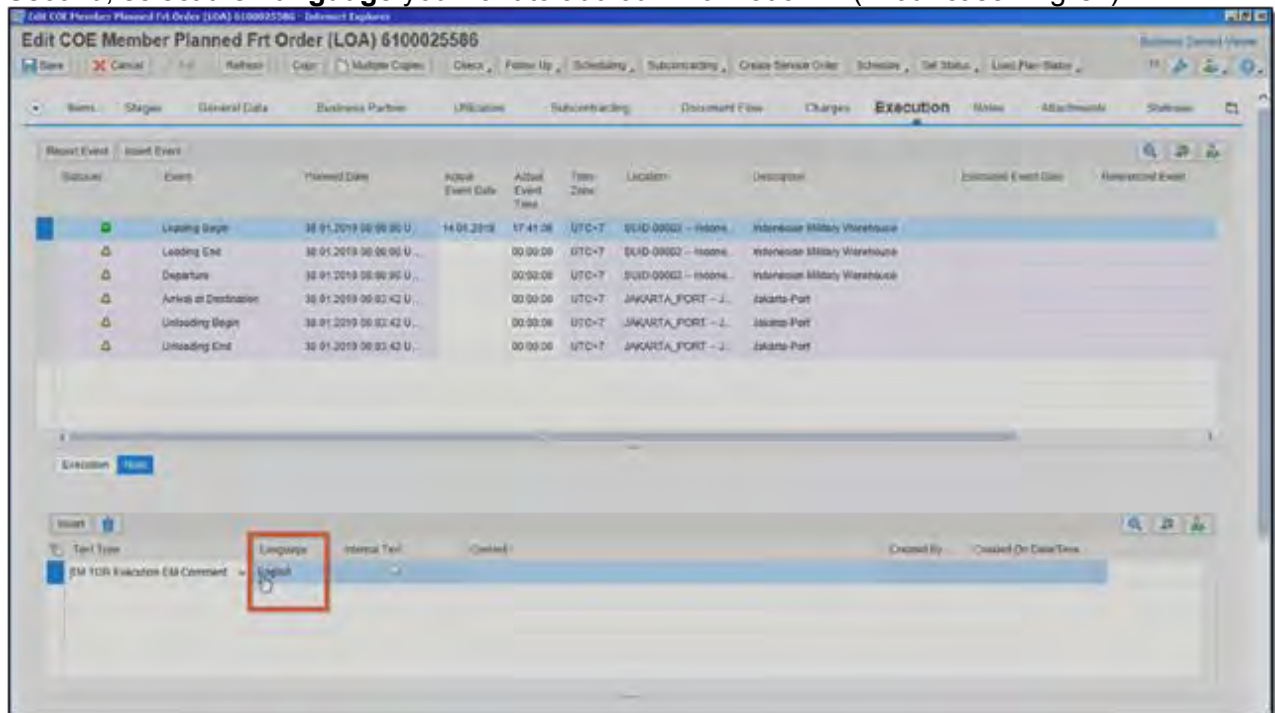
Insert

Text Type

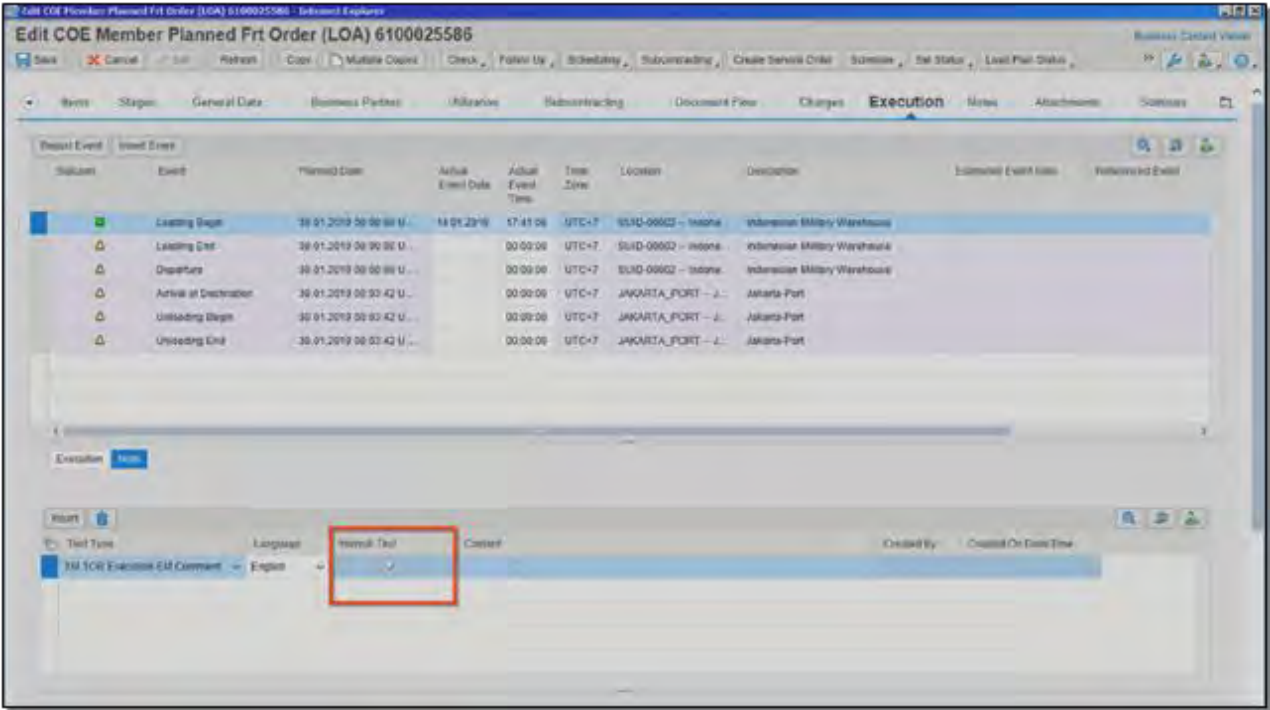
Click on the Drop-Down list the **Text Type**:



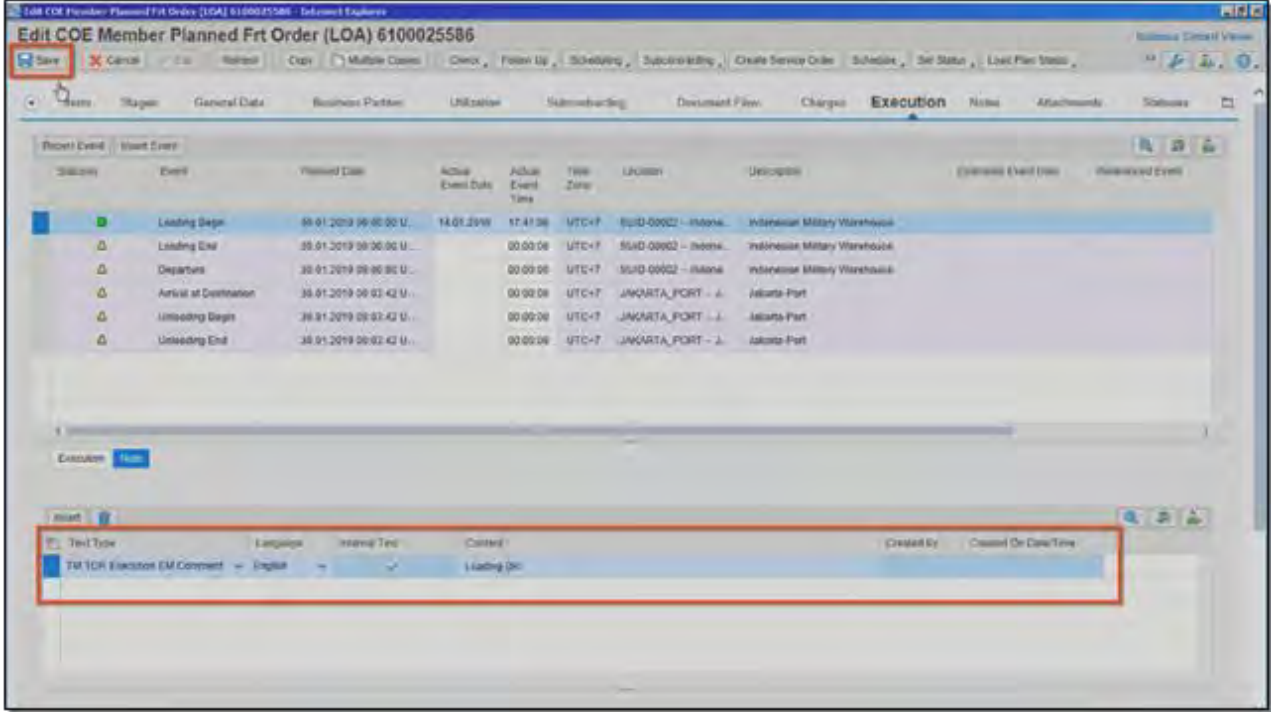
Second, select the **Language** you want to add our information in (in our case English):



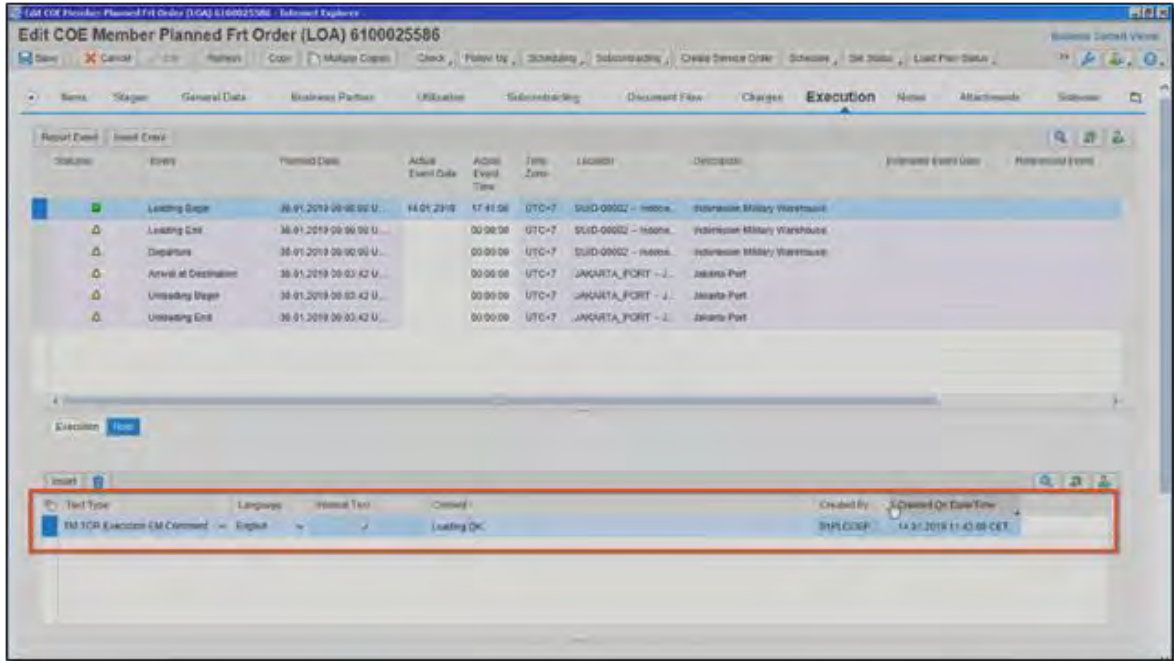
The **Internal Text** Checkbox will appear ticked. This cannot be changed. The note is only internal and will **not** be visible in the **CCP**.



In the **Content** field, add anything that needs to be added to this specific event, **Loading OK**, in this case. Once all the information has been entered, click on **Save** at the top left of our screen, this information can still be changed and edited.

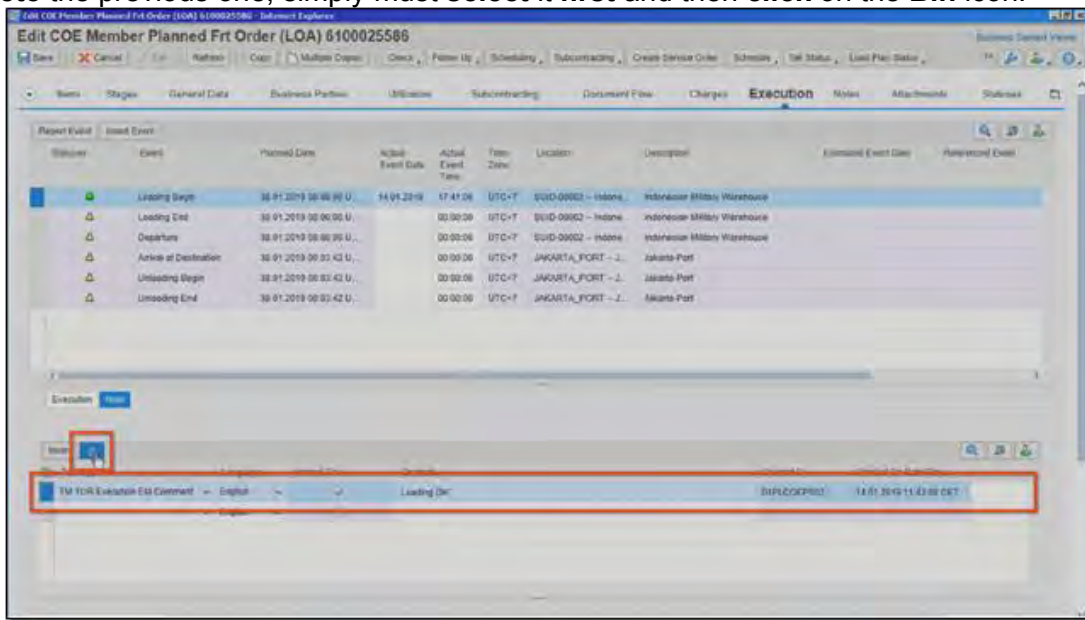


After **closing** the above prompt on the right corner, under **Note**, the information entered will be displayed including **who** created this note (**Created By** column) and **when** it was created (**Created On Date/Time** column).



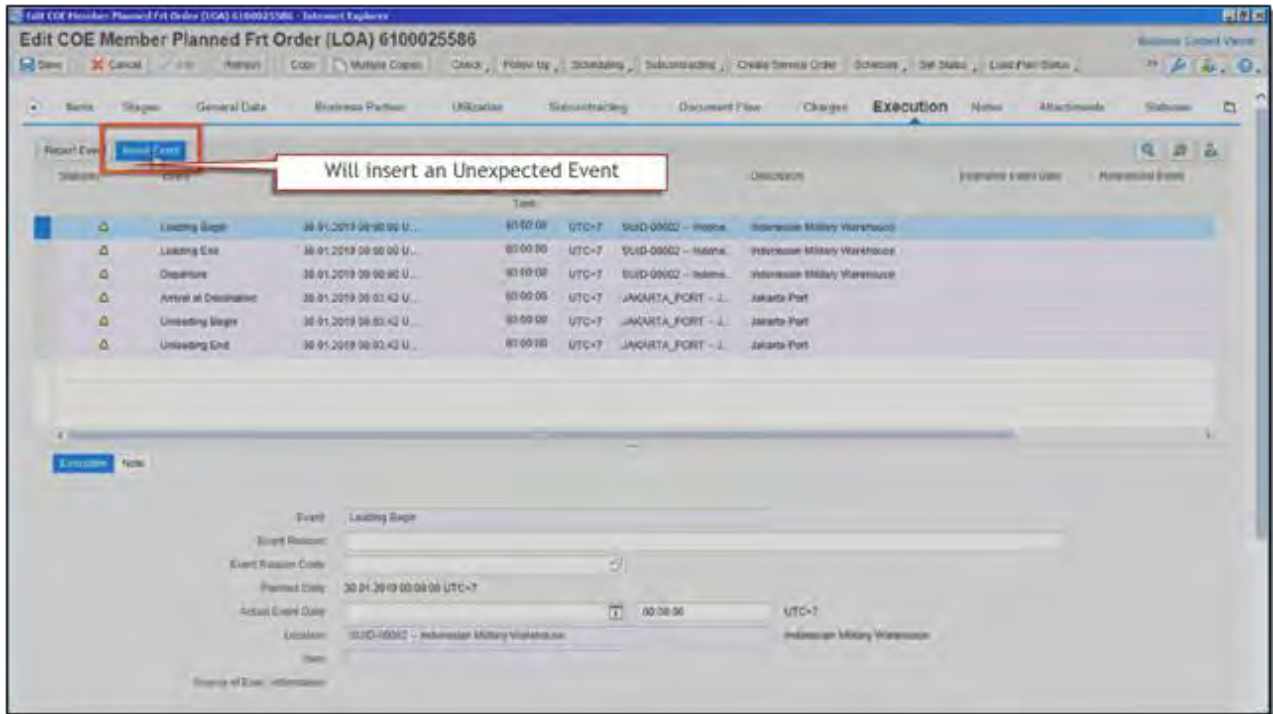
To insert a **new note**, click on **Insert** again.

To **delete** the previous one, simply must **select it first** and then **click on the Bin icon**.

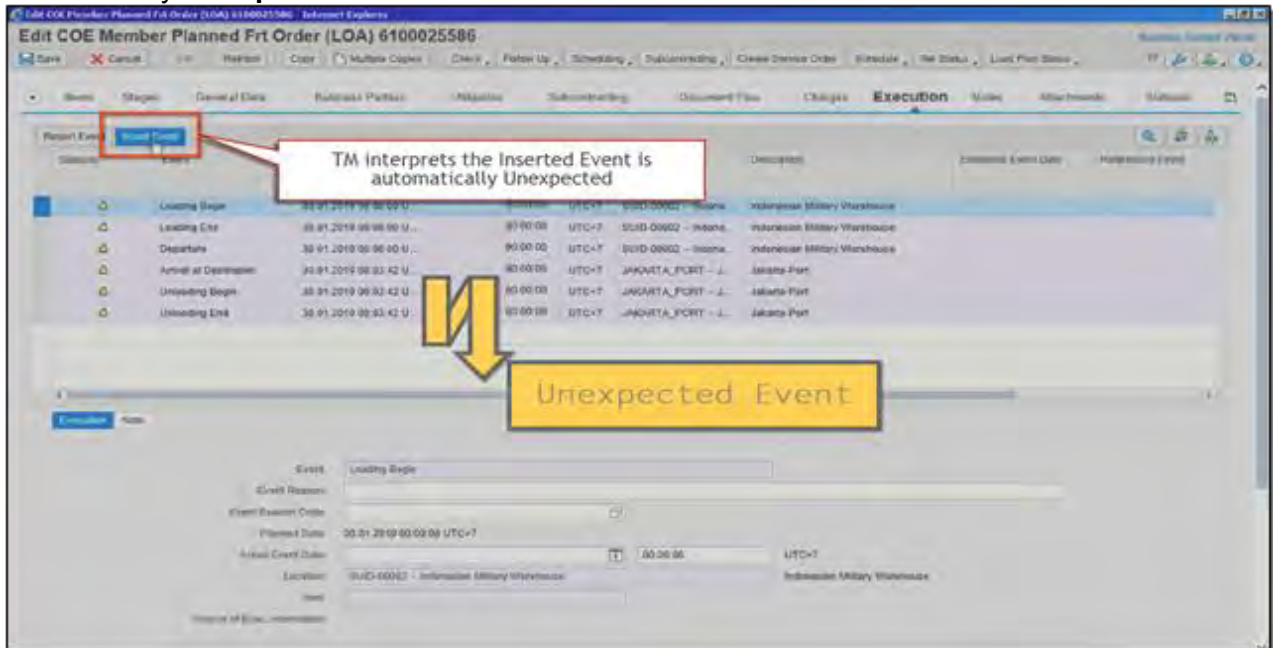


### Inserting an Unexpected Event

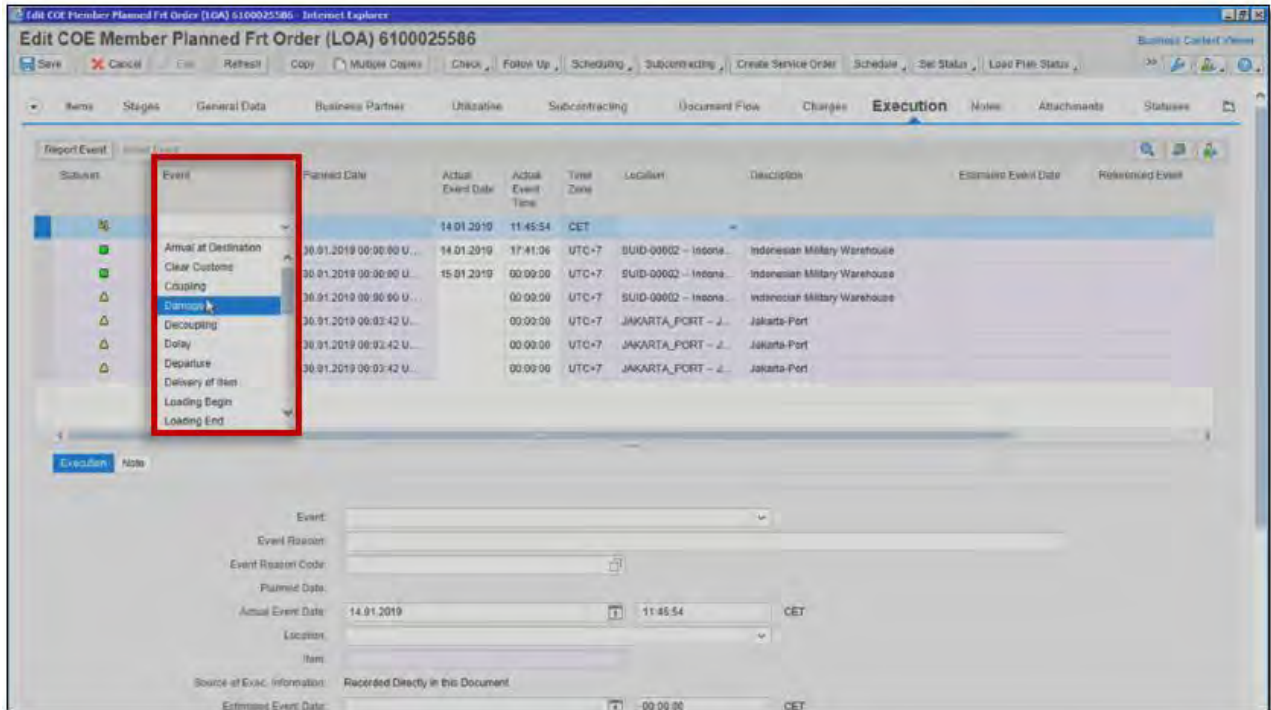
In the Execution Tab itself, click on the **Insert Event** button to insert an **Unexpected Event**.



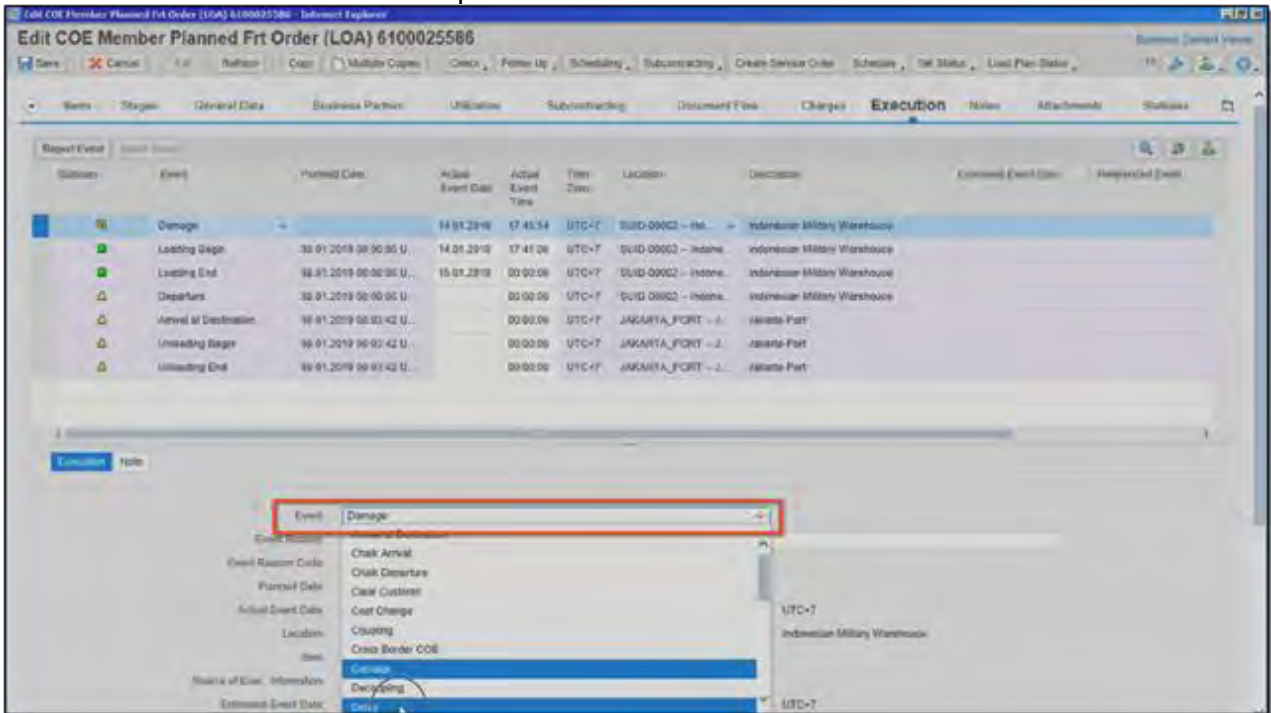
By clicking on it, TM automatically interprets that a new event inserted by the TM planner is automatically **Unexpected**.



Let's take an example of Damage. Click Insert event and observe that under the **Event** column a **drop-down** appears, that allows to **select** the type of **Unexpected Event** (Damage, Delay, Cost Change, Loss, Route Change, Quality Issue, Others).

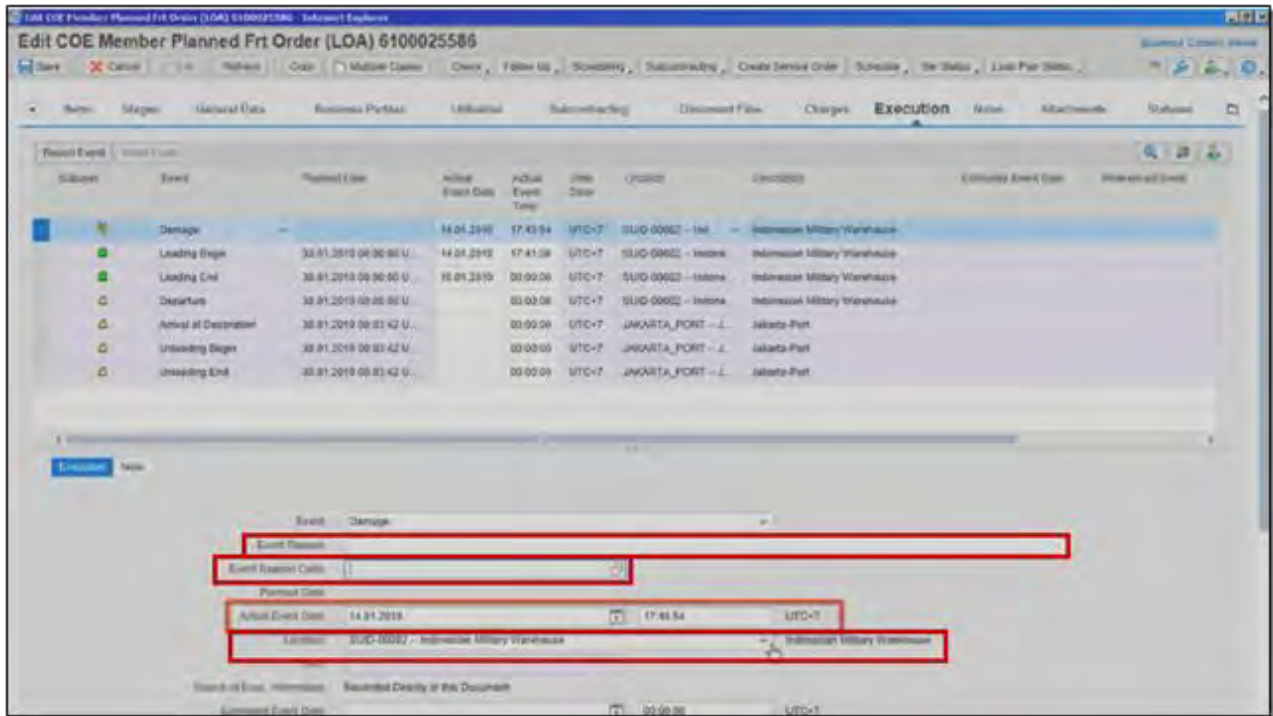


In our example we will select **Damage** as the **Unexpected Event**. We can also change the Event at the Execution tab on the bottom part of the screen.

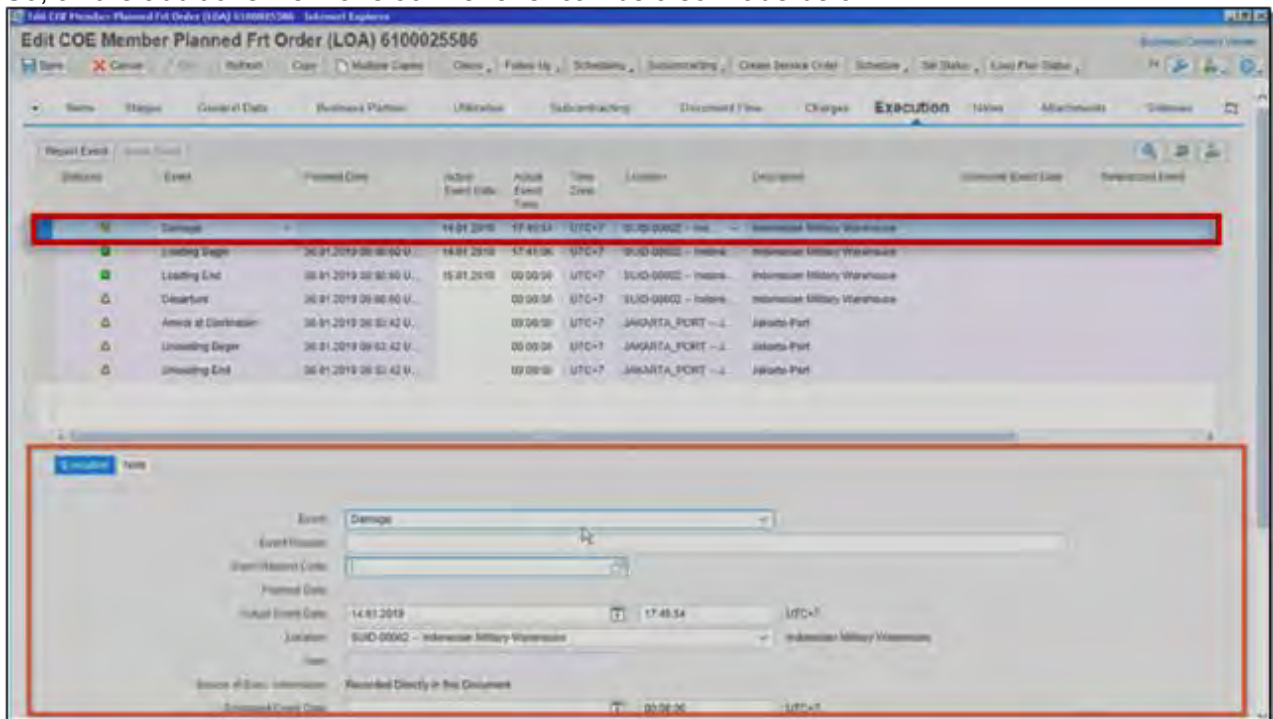


At the Execution tab, as we already saw in our previous examples, we can also add the **Event Reason**, the **Actual Event Date**, the **time** itself and the **Location**.

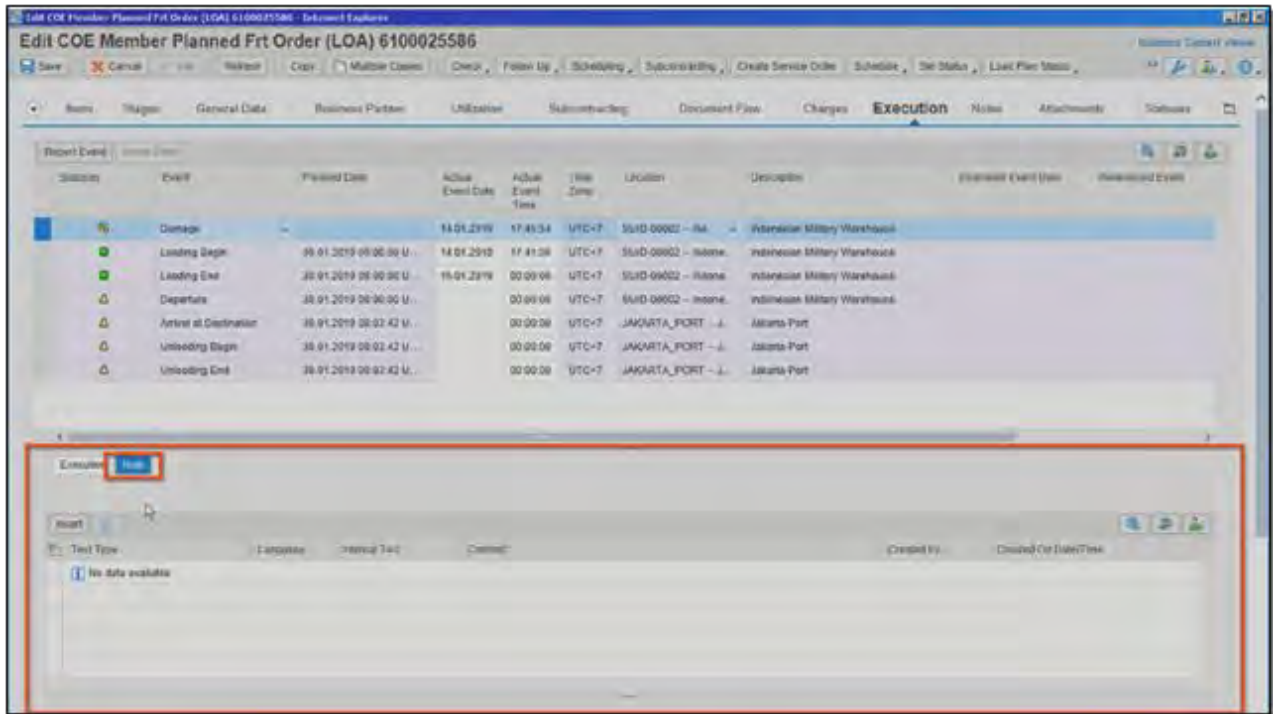




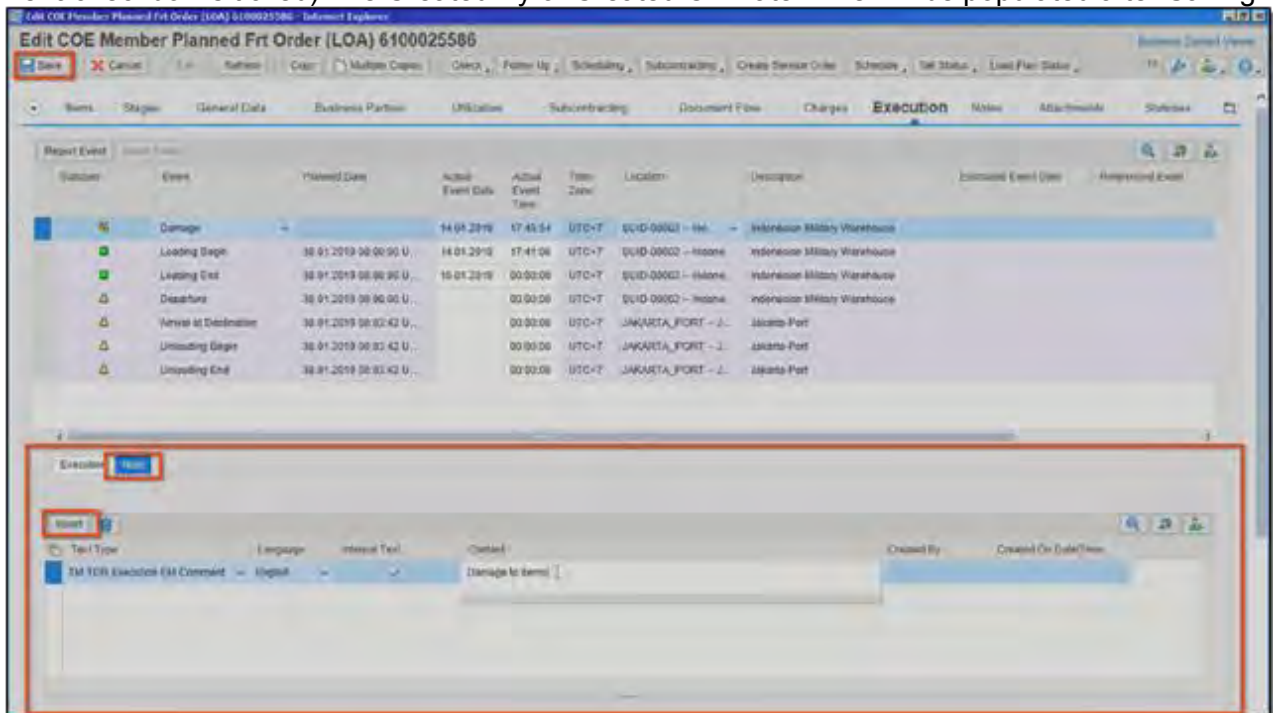
So, all the additions we make at **line level** can be also made below.



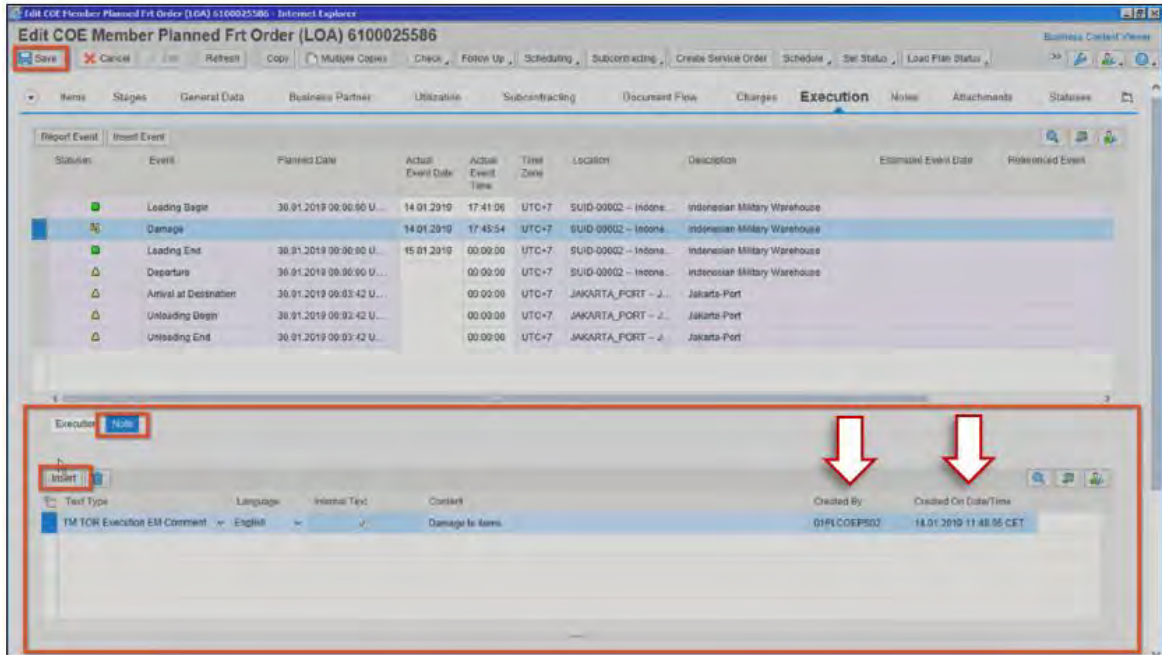
And the same applies for **Notes**.



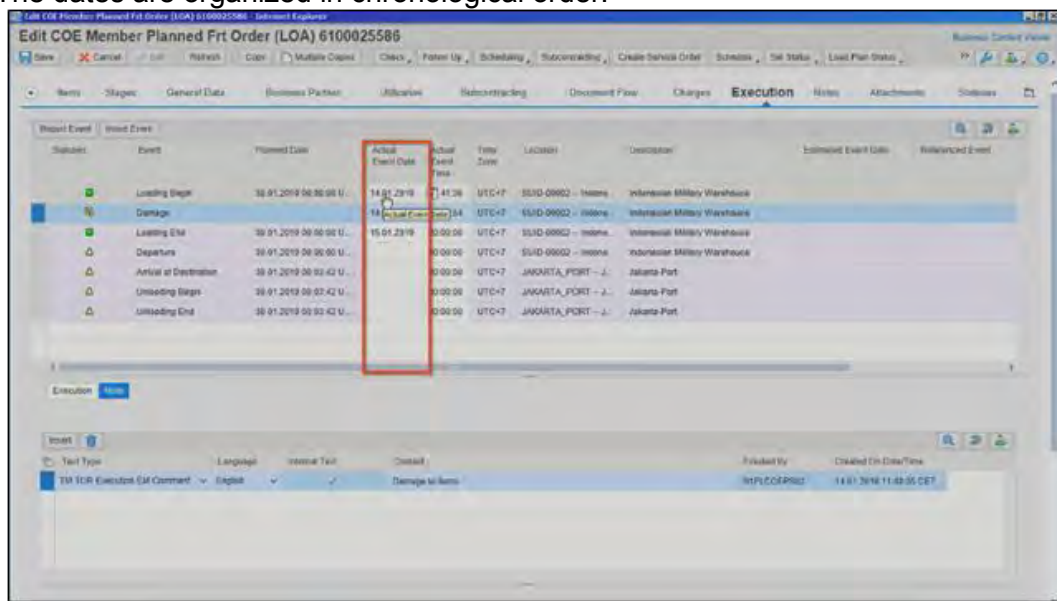
You may click on **Insert** and insert a Note related to our **Damage Unexpected Event**. As shown below, before Saving, we have inserted a **note** to our Unexpected Event **Damage**, which content says **Damage to items**, it's written in **English**, and will be only accessible internally (the **Internal Text** checkbox is ticked) The Created By or Created On Date/Time will be populated after Saving.



Click save to record the note.

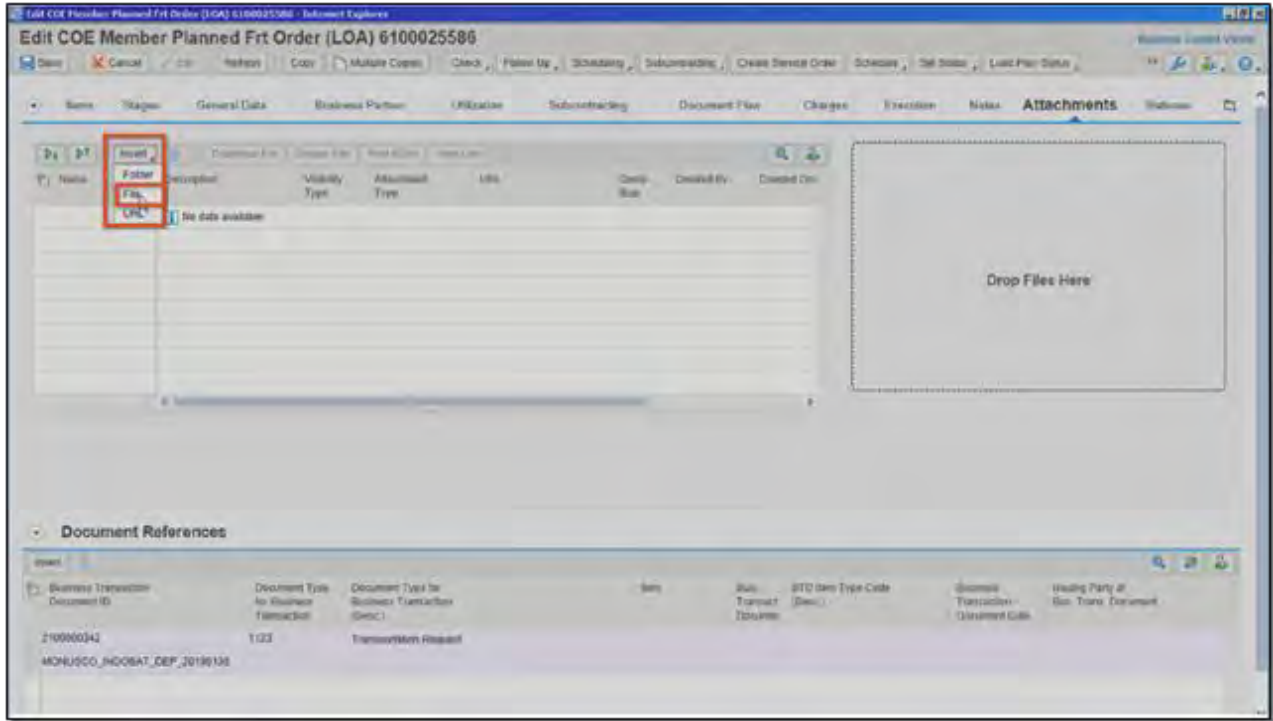


After **Saving**, the system **reorganizes** the events based on the **Actual Event Dates** as we can see below. The dates are organized in chronological order.

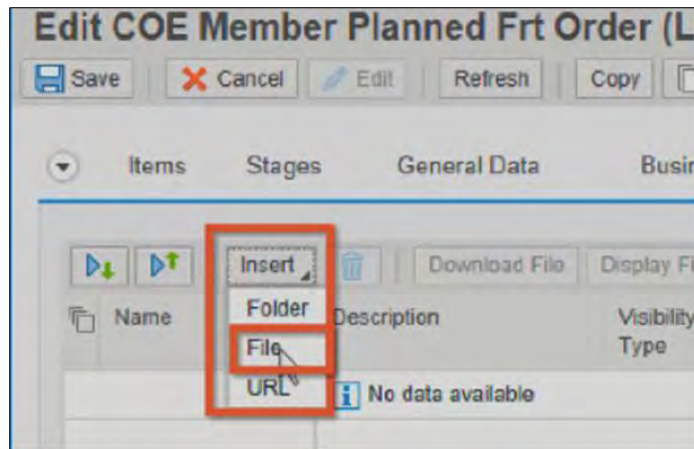


## 1. Uploading an Attachment

Navigate to the Attachments Tab of your freight order. **To add an Attachment**, click on the **Insert** button.

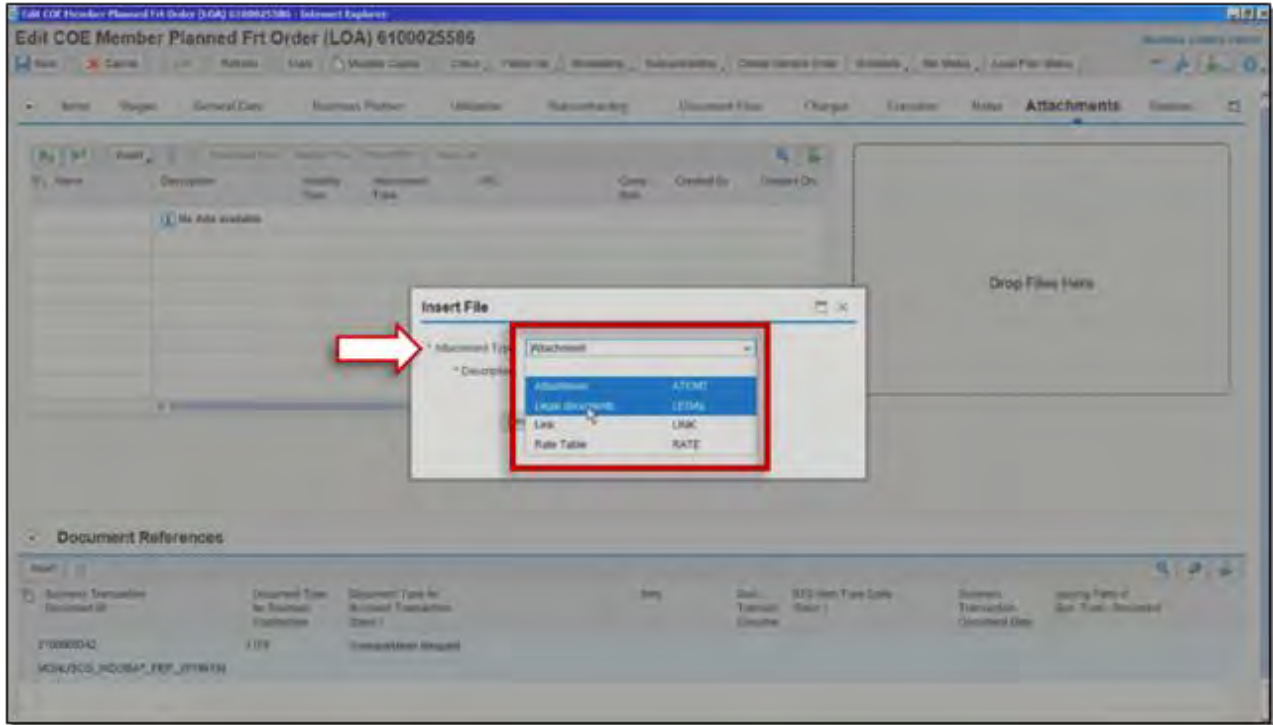


Then select the desired option, if you want to insert as a **File** or **URL** or a **Folder**. In this case, we're going to add a **File**.



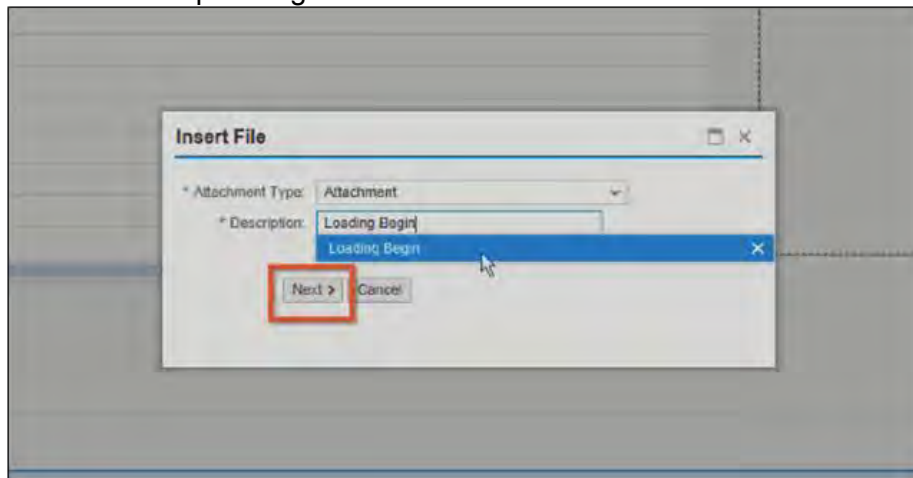
TM will prompt a window (**Insert File**) that will allow us to **still change** the **type of Attachment** that we're adding (**Attachment Type**). Either:

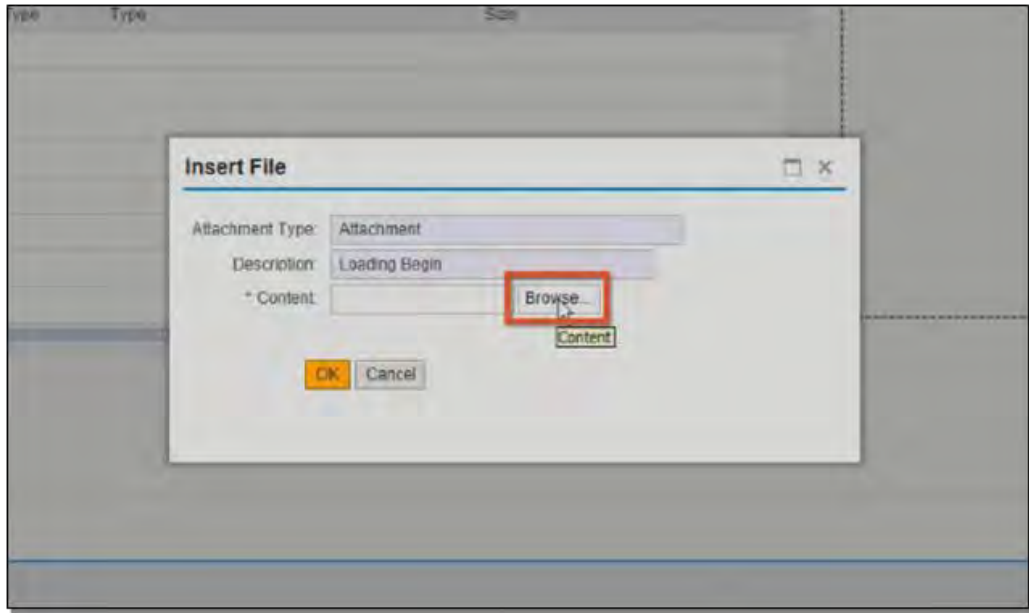
- a **Legal Document**,
- a **Link**,
- or a **Rate Table** in Production.



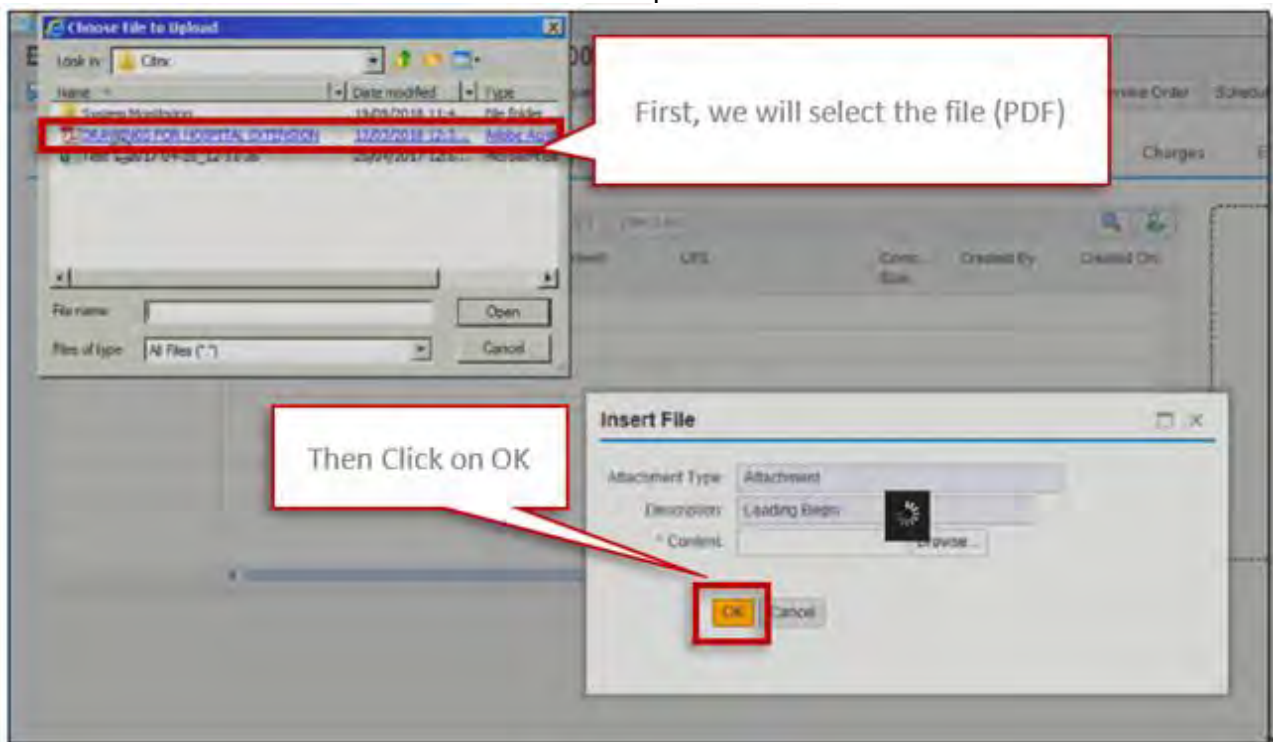
We're selecting **Attachment**.

We would add the **Description** to the attachment that we want to add. We could either link it to the actual event that we're submitting, Loading Begin. In this case we have simply typed in the name of the actual document we're uploading. Then we would click on **Next**.

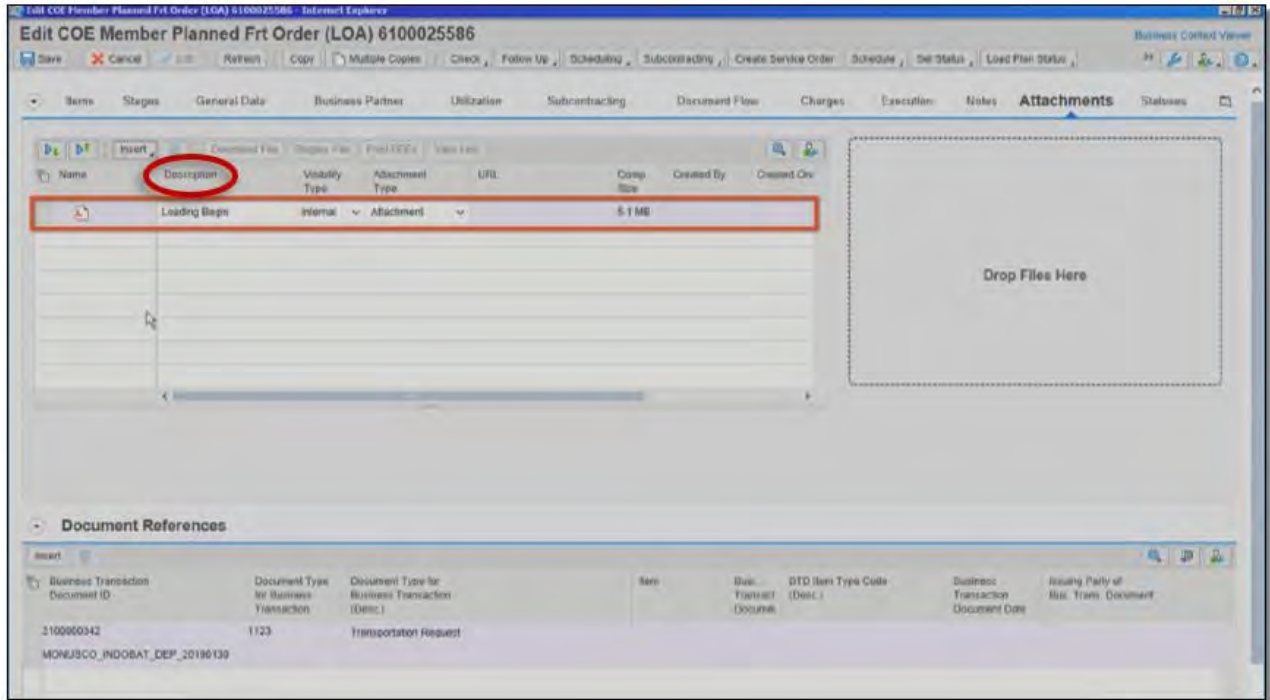




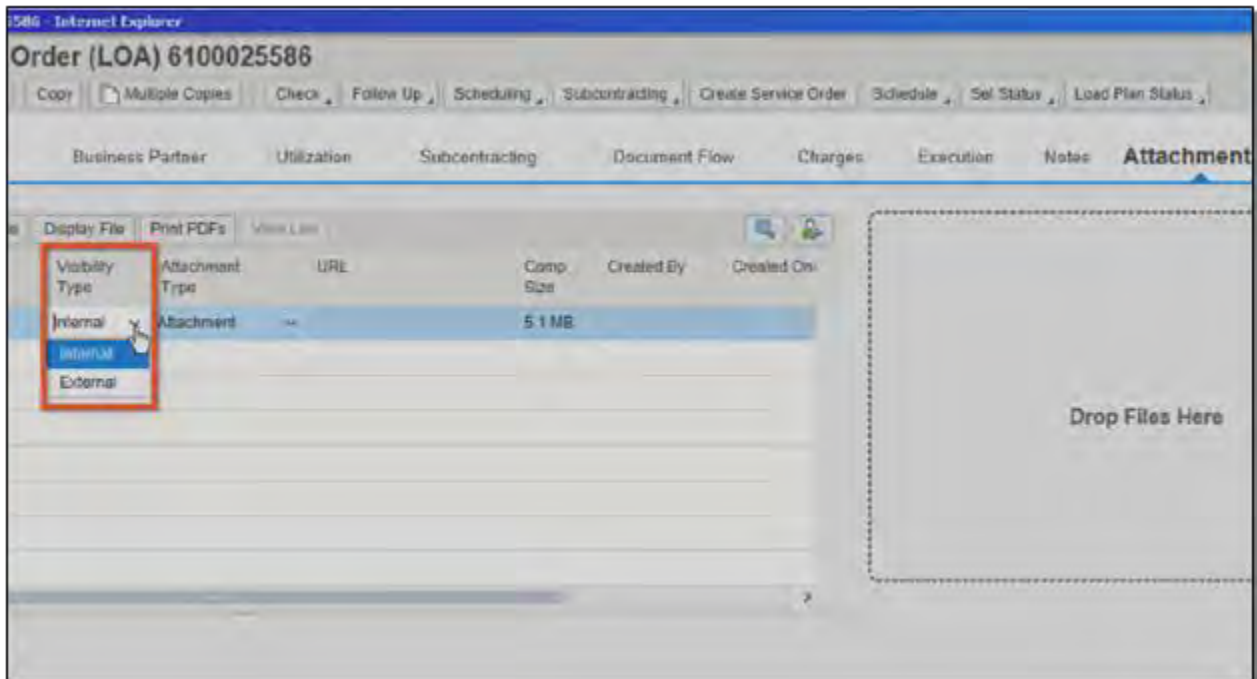
Click on **Browse** to browse the content of our computer.



In this case, we are going to add this **PDF**, and click on **OK**.

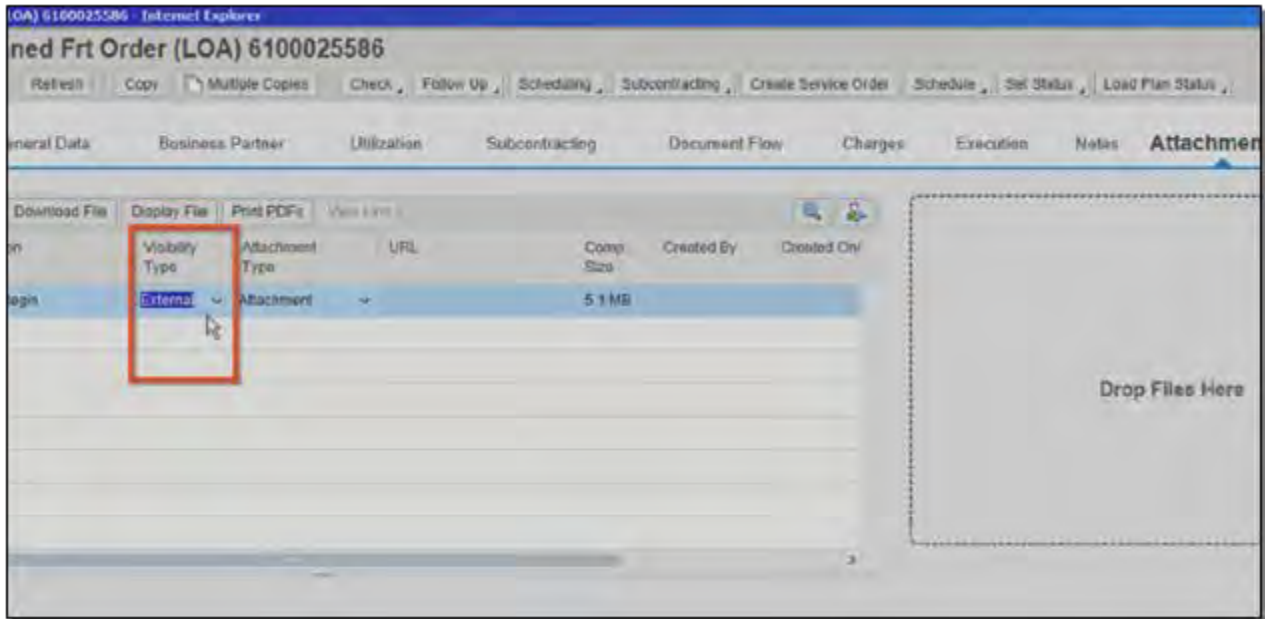


Once we do that, we'll realize that the first line here, will be related to the document that we have attached with its **Description**, in this case, **Loading Begin** (we can add any description we would like)

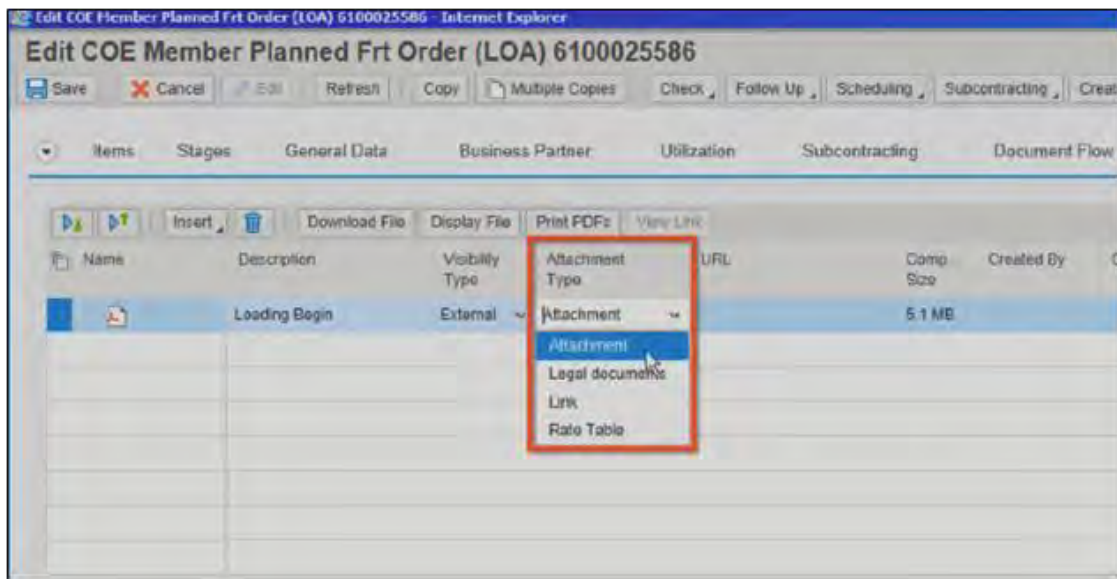


Also, the **Type of Visibility**, if you want it to be simply **Internal** to TM, or you want a Freight Forwarder to be able to view this Attachment as well. (**External**)

We would click on **External**, so **this can be viewed outside of the actual system i.e. in CCP.**

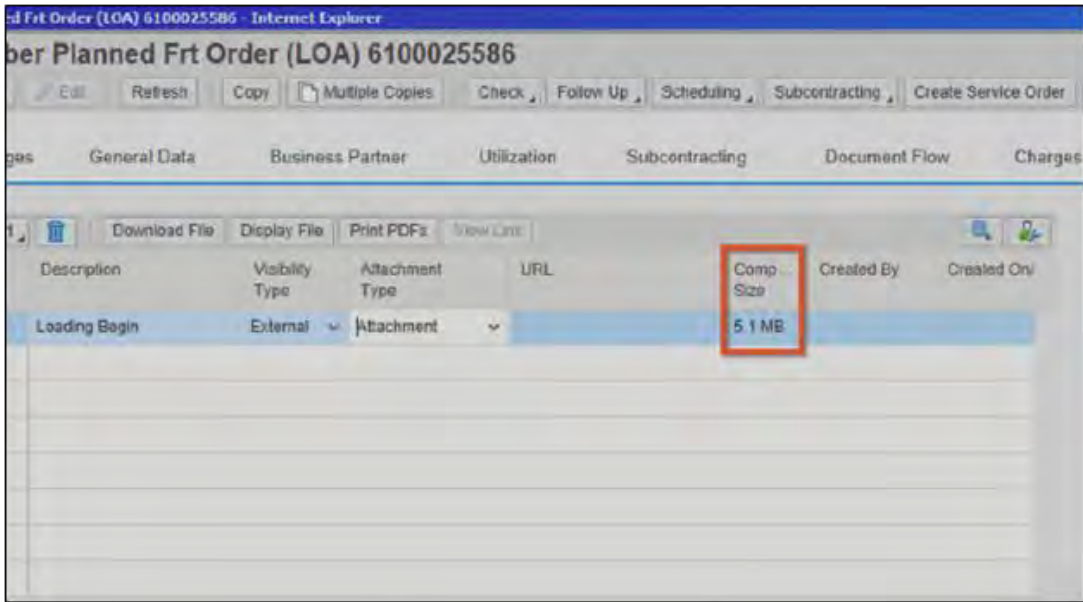


The **Attachment Type** has already been dictated at the beginning, but **can still be edited** later on, in this case, we're leaving **Attachment**.

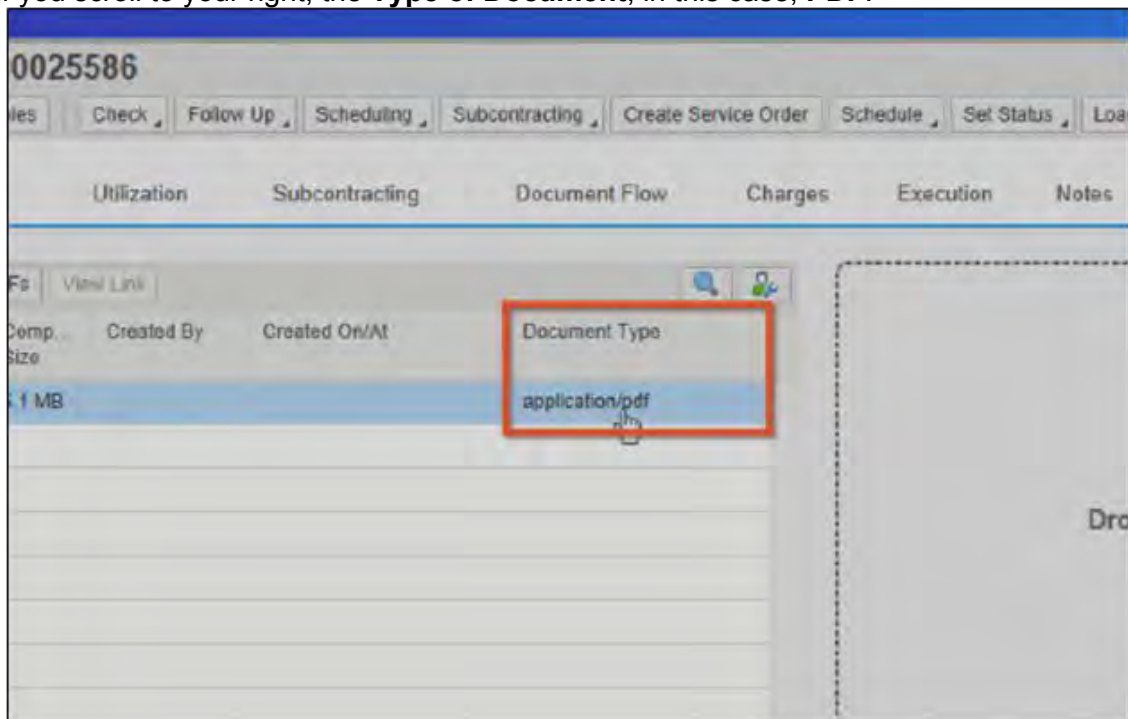


It'll tell you the **size of the file** that you're loading (**Comp. Size**).

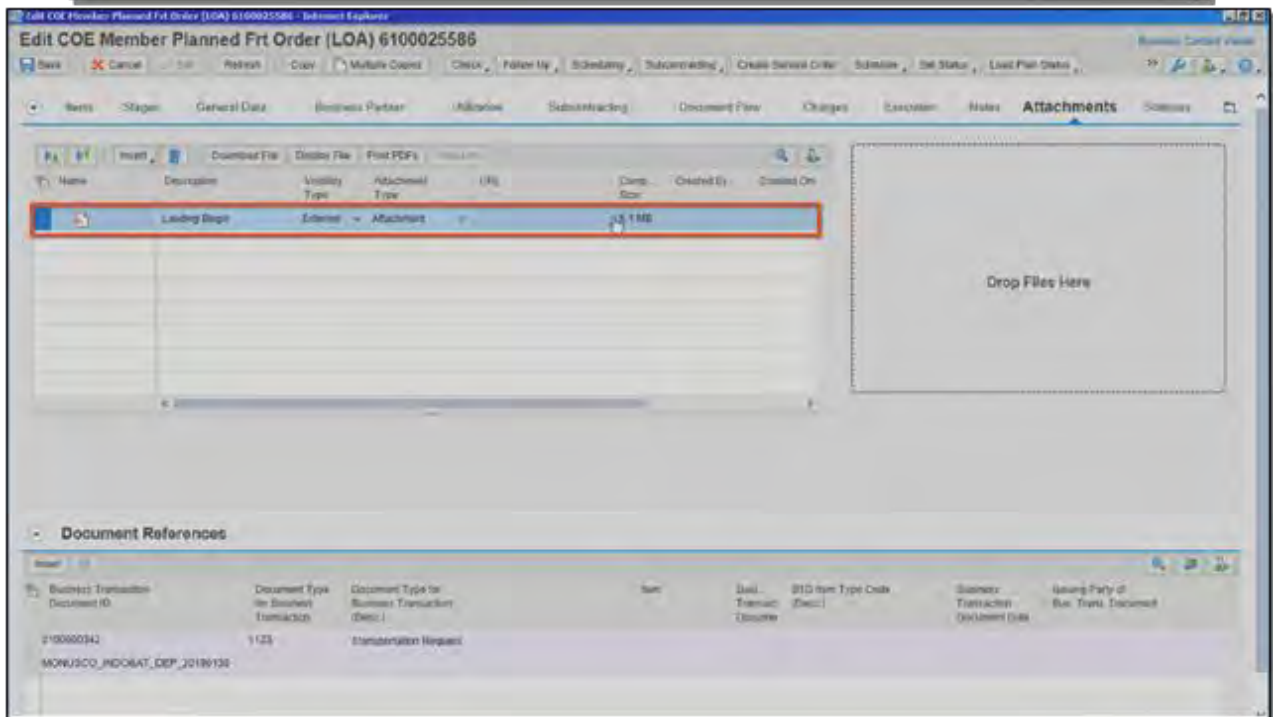
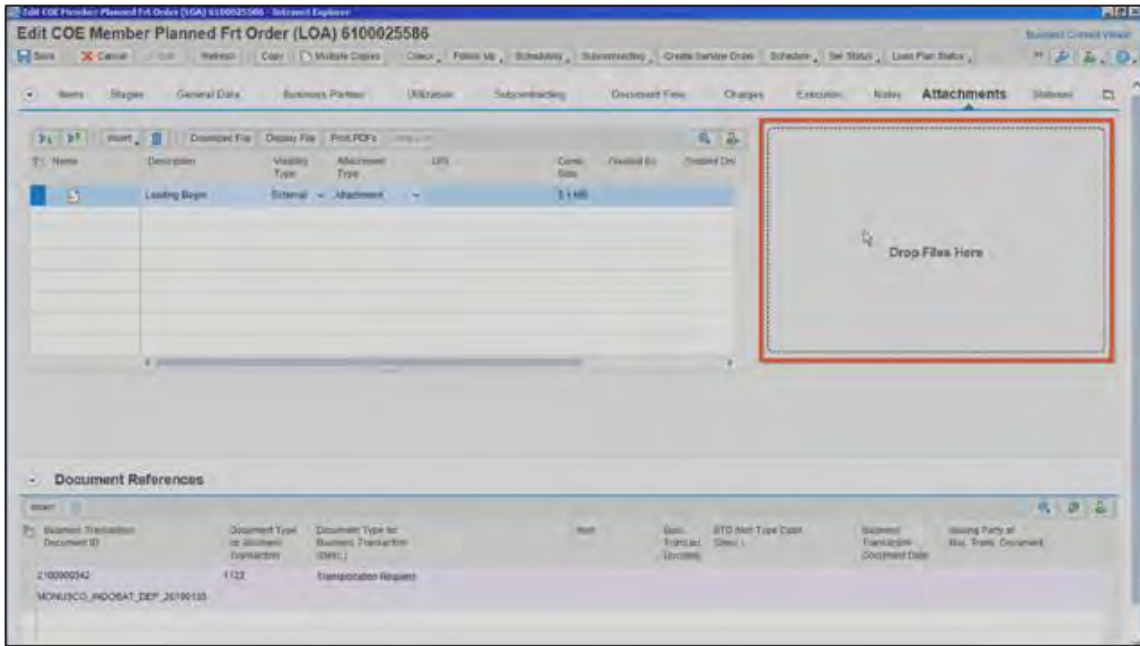




And if you scroll to your right, the **Type of Document**, in this case, **PDF**.



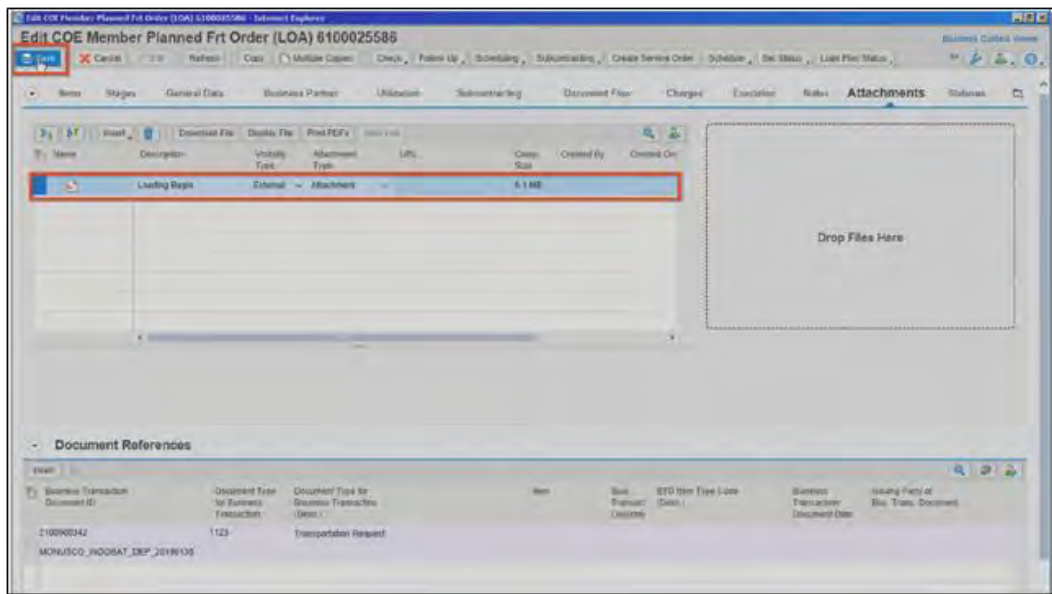
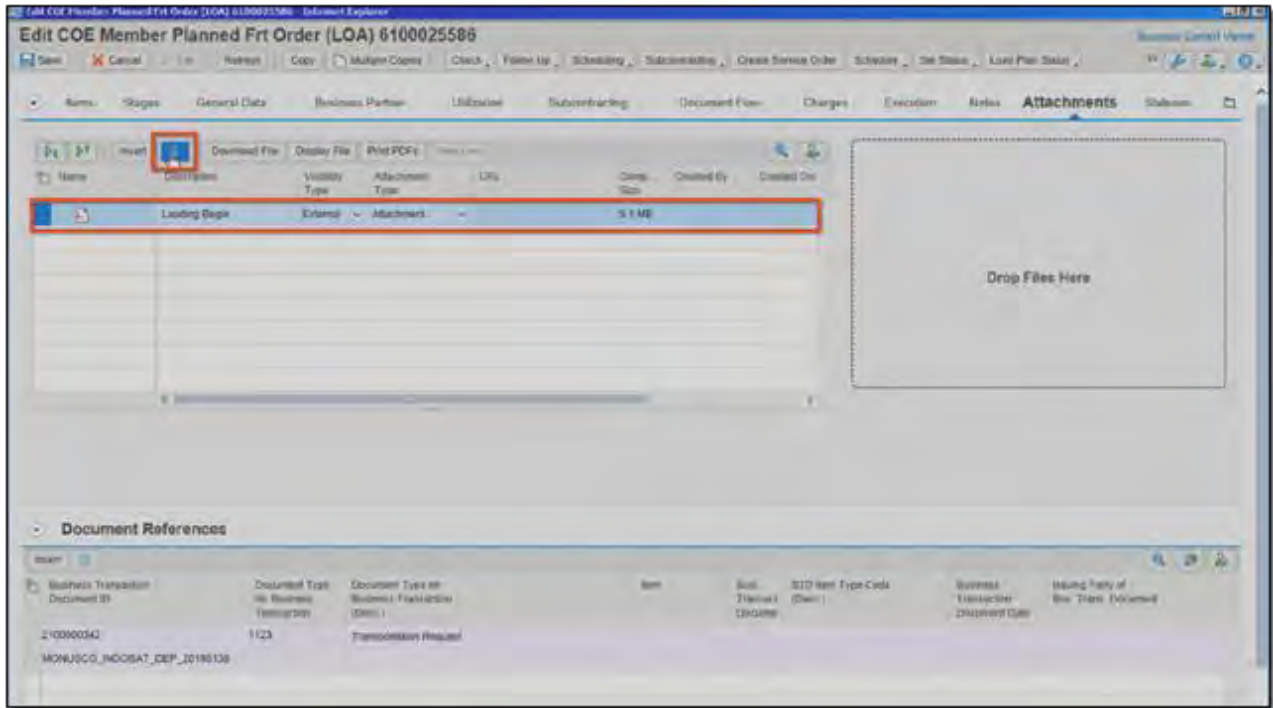
These files can also be added, by simply dragging and dropping into this box, where it says **Drop Files Here**. The drag & drop option does currently not work through Citrix; therefore, a mass document upload was created. Please refer to section Upload documents from SharePoint to TM of this document.



We have successfully added our first **Attachment**, to our event that we've submitted.

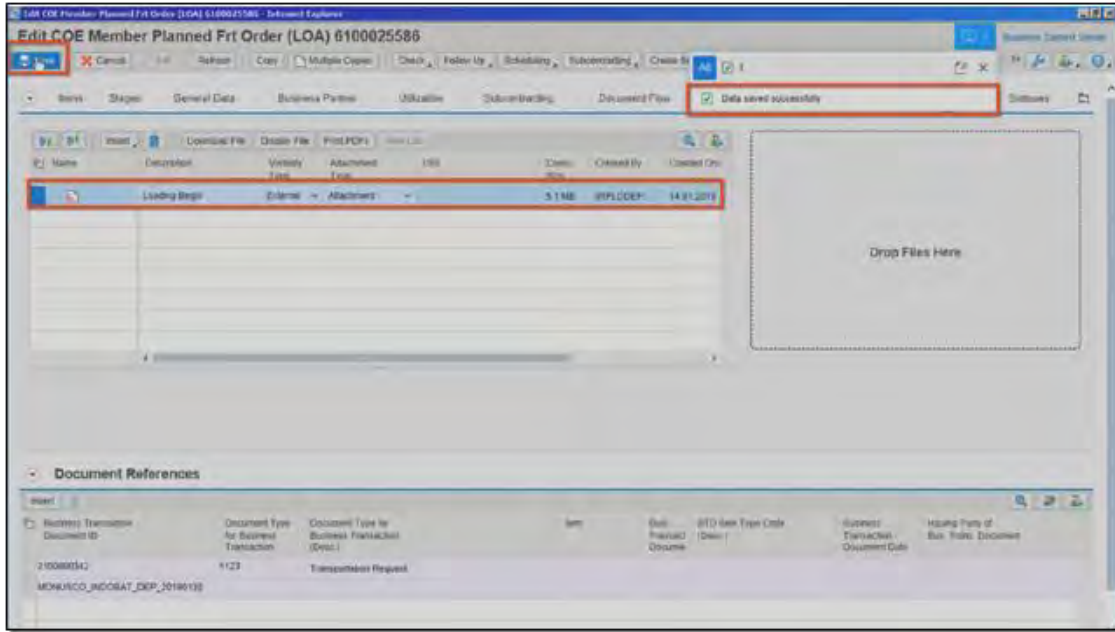
## 2. Deleting or Saving an Attachment

In this case, for "Loading Begin", once we have added our file here, we could simply either **Delete** it, if it's the wrong file, by **selecting** it and clicking on the **Bin** button.



or **Save**, if we're done with the upload of our file.

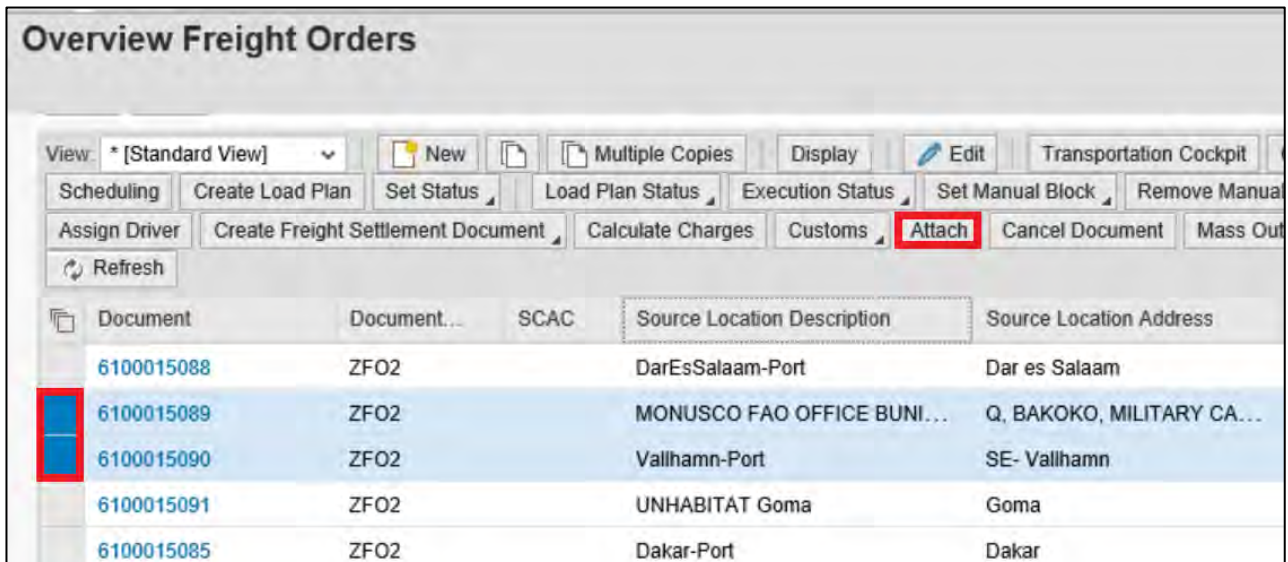
**Once we have saved the file**, we will see a message that reads: **Data Saved Successfully**.



### Upload documents from SharePoint to TM

The document upload from SharePoint works for document uploads to the Attachment Tab in the Freight Order, the Mass upload of documents through 'Attach' on the Freight Order Overview, and for the Forwarding Order Upload. Below the process description for mass upload of documents from SharePoint.

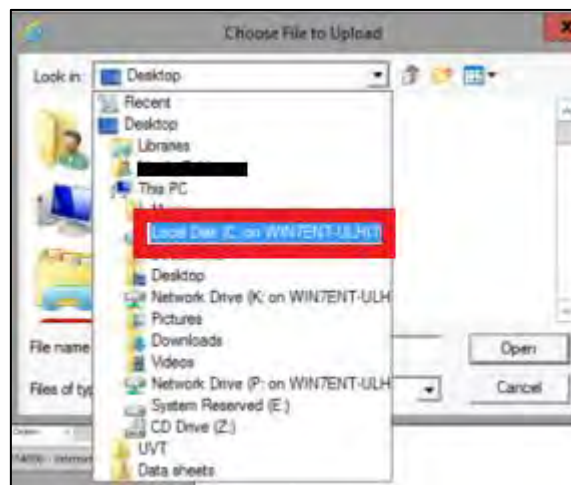
Search for the documents. Mark the lines for which orders the documents should be uploaded.



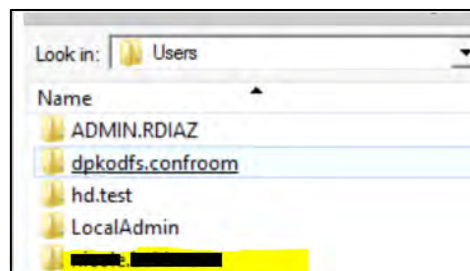
Confirm the file upload message with "OK".



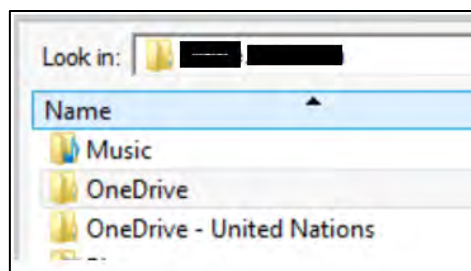
Choose file to upload window pops up. Choose Local Disk.



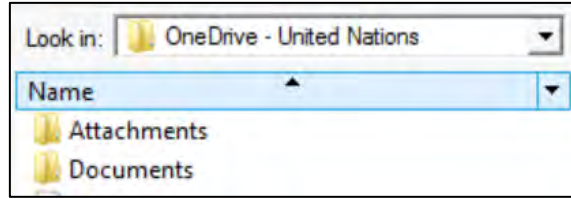
Choose 'Users' and then your own folder 'FirstName.LastName'.



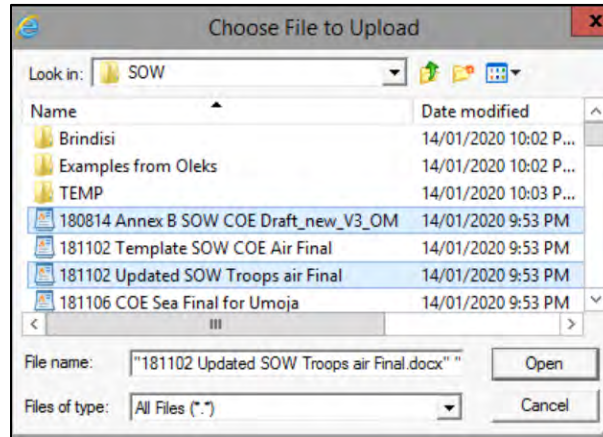
Choose the 'One Drive – United Nations' where your documents are stored.



Then click on the folder where the document(s) are stored that you wish to upload.



Mark the document(s) to be uploaded and confirm with 'open'.



## Chapter 11. Electronic Data Interchange (EDI)

### What is EDI?

The EDI functionality has been developed to provide a direct connection between the Transportation Management (TM) system and the goods vendors' and freight forwarders' information systems. EDI enables instant communication between the respective systems on the freight order, purchase order, shipment information and status updates. It replaces the use of the Carrier Collaboration Portal (CCP) – a web-based communication portal, making it optional, for those goods vendors and carriers who have completed the EDI set-up and required testing with the UN.

The benefit of EDI is a real-time exchange of information with goods vendors and carriers with whom EDI has been set up. The external partner would no longer need to access Carrier Collaboration Portal (CCP)<sup>7</sup> and submit events and documents related to the order assigned to them. Goods vendors would also not be required to coordinate about Purchase Order and shipment details via email/phone with the UN.

### Access to EDI

The process to set up the EDI functionality with a goods vendor or freight forwarder is not a matter of access provisioning. Once a goods vendor or freight forwarder confirm that they have EDI capability, they need to be set-up for EDI on an ad-hoc basis. The UN system and the vendor's system need to undergo the following:

1. Briefing the vendor of the four interfaces for EDI (described in the next section)
2. Set-up a technical connection between the vendor's system and the UN's system
3. 2 rounds of testing including a final user verification testing

In case the Goods Vendor/Freight Forwarder does not have EDI capability, they can continue to use CCP to submit events and documents. In case they do not have CCP access or are in process for getting access, the Umoja role TS.01 TM Planner and TS.02 Manage Freight Order can update the related events/attachments directly in the TM module.

### 4 Interfaces of EDI

The use of EDI requires configuration of 4 interfaces. The first 2 are only applicable for goods vendors and the last 2 are applicable for both goods vendors and freight forwarders.

1. Purchase Order Interface (POI)
2. Advanced Shipping Notification Interface (ASN)
3. Freight Order Interface (FOI)
4. Events Interface

---

<sup>7</sup> To learn more about using CCP, refer to the Information Packs available in <https://umoja.un.org/CCP>. In case the goods vendor/freight forwarder 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.



### Purchase Order Interface (POI)

The Purchase Order interface of EDI will enable the approved purchase order to be manually sent from SRM to the goods vendor's system directly. The PO document will also be required to be approved following the approval workflow prior to sending it electronically to the vendor using EDI. The XML file sent via EDI containing the PO details will not include a digital signature or details of the approver. This file will only be sent after approval is completed in Umoja.

This process and procedure will be addressed by including a clause in all solicitation documents for goods requiring freight forwarding services and any follow-on contractual documents such as Contract and/or Purchase Order to request for specific vendors with the capability for EDI to be able to use this type of communication for transmission of documentation and data. The clause will have to be added only after the vendor has been onboarded for EDI with UN following setting up the connection and the required levels of testing. This clause will request for vendors to agree to the use of EDI and ensure that their IT systems are able to connect and then support the transmission of the information for all commodity/goods purchase orders.

### Advanced Shipping Notification (ASN) Interface

Following the receipt of the PO using the PO interface of EDI, the goods vendor will send related ASN details back to the United Nations using the ASN interface of EDI. The ASN received from the goods vendor will trigger the automatic creation of the Inbound Delivery Document (IBD) in ECC. Currently, the IBD is created automatically using a batch job in ECC or manually by the user. The automatic creation of Inbound Delivery document before ASN is received will need to be switched off for vendors using the solution so that there are no duplicate documents. Those specific vendors which are onboarded for EDI will thus be excluded from this batch-job for creation of IBDs. If there is no ASN sent automatically, the Inbound Delivery Document would need to be updated manually as is the current practice.



On receiving the ASN, all relevant information such as dates, items, quantities, and packaging details of items being shipped will be automatically updated in the IBD. Should the goods vendor send a revised/changed ASN, the IBD will automatically update. Similarly, any deletion of ASN will also lead to the automatic deletion of the respective IBD.

The current steps to manually pack in an Inbound Delivery in ECC will no longer be required to be carried out for cases where EDI for the goods vendor is used. With respect to packaging, it is important to note that the goods vendor should use the UN PIDs for goods and packaging materials in order to ensure accuracy of the ASN/HU/packaging details reflected in ECC.

### Freight Order Interface (FOI)

The scope for EDI also extends to sending freight order details to vendors for specific shipments. This means that vendors will have more accurate information about the shipment with respect to the different legs (Freight Order), dates, items etc. This functionality for sending Freight Order through EDI is already in place for one vendor (J.A.S, for UNHQ (not global) for stationary not strategic materials) as of February 2020.

This interface allows users to manually send Freight Order Details from TM to the Carrier or automatically send Freight Order Details from TM once the Carrier has been manually assigned. The automatic sending of freight order occurs through a batch job once a day.

Unlike PO and ASN interface, which is relevant to goods vendors only, this interface is relevant to both goods vendors and freight forwarders. After solicitation for non-DAP shipments is complete, freight orders have been manually assigned to the freight forwarder in the TM system. The freight forwarders using EDI will then receive FO details through the FOI. Similarly, for DAP shipments and non-DAP shipments where specific legs are the responsibility of the goods vendor, they will receive specific FO details through the FO interface for EDI. There is a batch job in place for automatically sending FOs to respective vendors using EDI through the FOI.

### Events Interface

The scope for EDI also extends to enabling vendors to submit expected and unexpected events and documents for shipments using EDI. The goods vendors and freight forwarders onboarded for EDI will no longer be required to coordinate shipments with the UN via email, phone, other systems and will also not be required to login and update details on the Carrier Collaboration Portal (CCP). This functionality for receiving Events through EDI is already in place for one vendor (J.A.S, for UNHQ (not global) for stationary not strategic materials) as of February 2020 and will have to be configured ad-hoc as more vendors are onboarded for EDI. This interface allows the automatic reflection of event details submitted in the Goods Vendor/Carrier's system (that is EDI enabled for the UN) in Umoja TM. Note the below:

- Vendors/Freight Forwarders can send all expected and unexpected events along with attachments through their EDI enabled system. The exact list of Track & Trace Events and Documents is indicated in the flowchart in the CCP section above
- Vendors/Freight Forwarders using EDI are no longer required to use Carrier Collaboration Portal (CCP) or offline communication.
- Vendors /Freight Forwarders must be aware that the proof of delivery is the last event and after that, no further events can be sent by them.

Unlike PO and ASN interface, which is relevant to goods vendors only, this interface is relevant to both goods vendors and freight forwarders. After solicitation for non-DAP shipments, freight forwarders using EDI will send events updates and attachments through the Events interface.

Similarly, for DAP shipments and non-DAP shipments where specific legs are the responsibility of the goods vendor, they will send event details through the Events interface of EDI to the UN.

## Assigning Carrier and Sending Freight Order for EDI

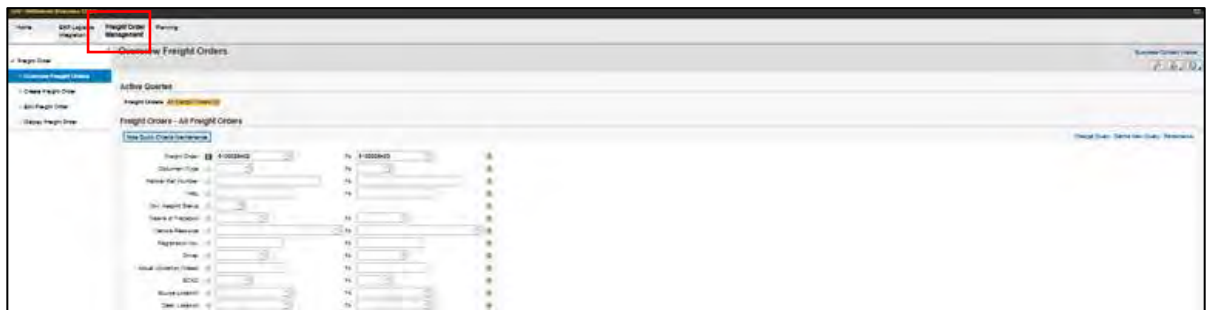
Once a freight forwarder has been set up for EDI with the UN, the TM Transportation Planner (TS.01) or TM Freight Procurement (TS.02) in **Non-DAP** Incoterm scenarios with this specific freight forwarder, are required to assign a Carrier (Freight Forwarder) to the Freight Order

The TS.01 and TS.02 role can also send **Freight Order details** to the assigned Carrier and goods vendor (if required).

Note that Freight orders with dummy carrier (unassigned) or with *any\_port* as source or destination location cannot be sent through EDI.

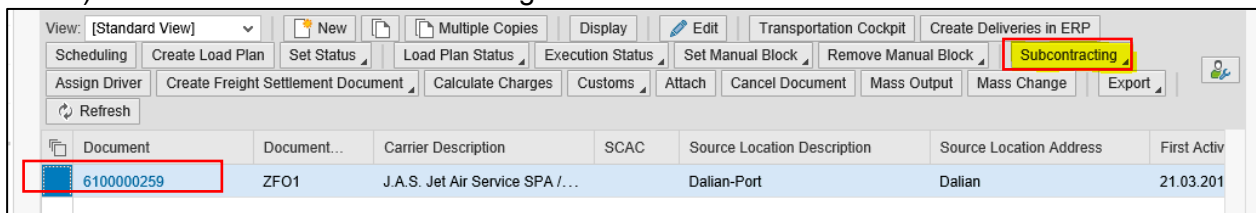
### Steps for Carrier Assignment:

Connect to TM and click on Freight Order Management tab:

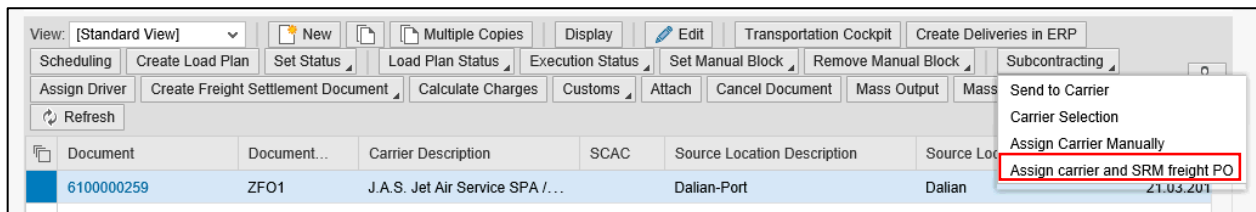


Search for Freight Orders you want to work on by typing the Freight Order number and clicking on “apply”.

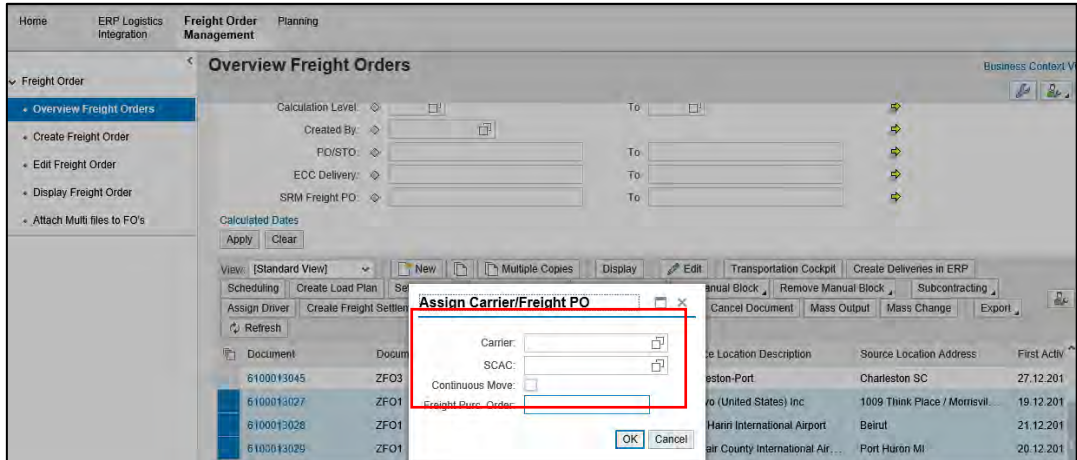
Once the Freight Orders appear below, select all the Freight Orders to assign a Carrier (freight forwarder) to and click on the subcontracting button:



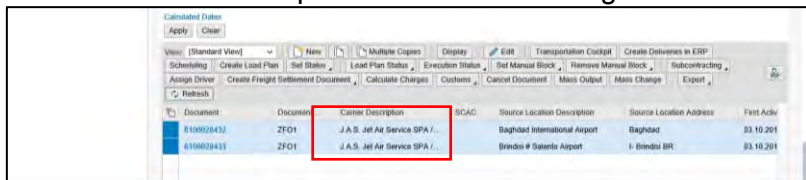
A list of options will appear. Click on assign Carrier and SRM freight PO:



A popup window will appear, please fill the Business Partner (BP number) of the Carrier (Freight Forwarder) and the SRM Freight PO. For the Carrier, you can also click on the matchbox next to 'carrier' and search for the business partner by clicking “search” and select the carrier. Once filled, Click ‘ok’:



Click refresh and confirm that “Carrier description” column has changed:

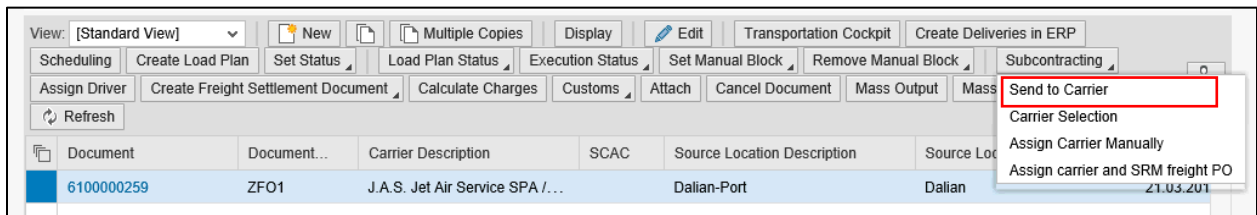


**Note:** If there is a need to update the carrier, simply perform the same action again and the new carrier details will override the previous one. Once the carrier is assigned, the system will automatically send the details to the Carrier. There is a batch process that performs this task once a day.

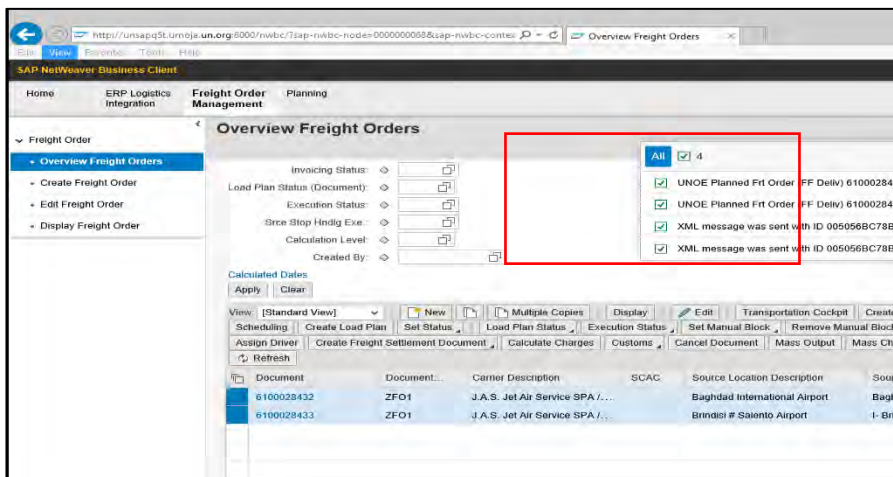
This task can be performed manually without waiting. Follow the next steps.

### Sending Freight Order Details Manually

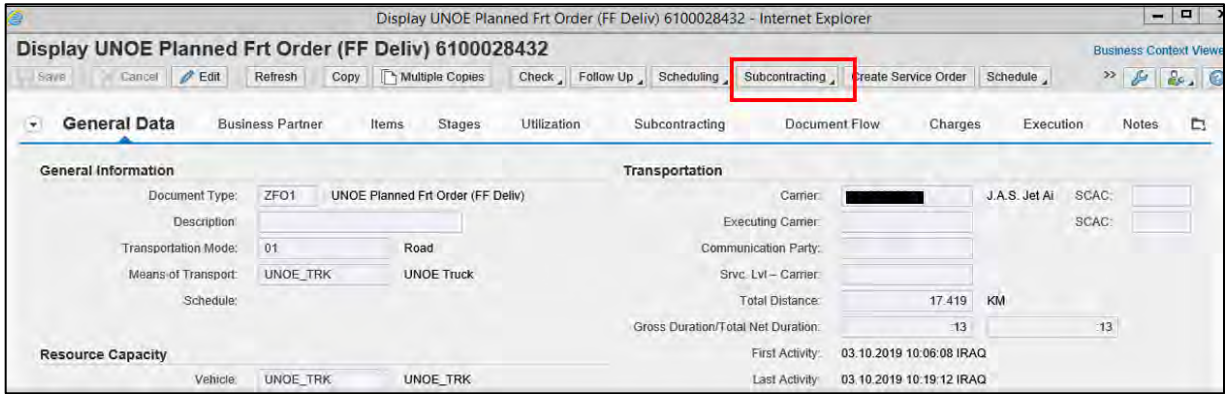
Select the specific Freight Orders. Click on subcontracting and click on “Send to Carrier”:



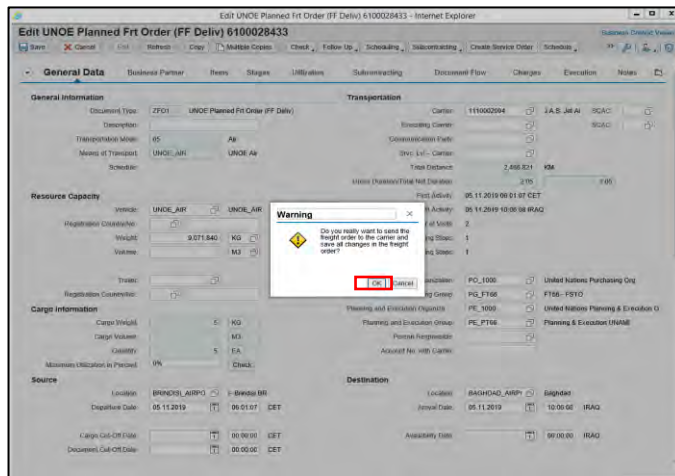
Select OK in the pop-up window. The dialog box on top will confirm that XML files were sent to the Carrier:



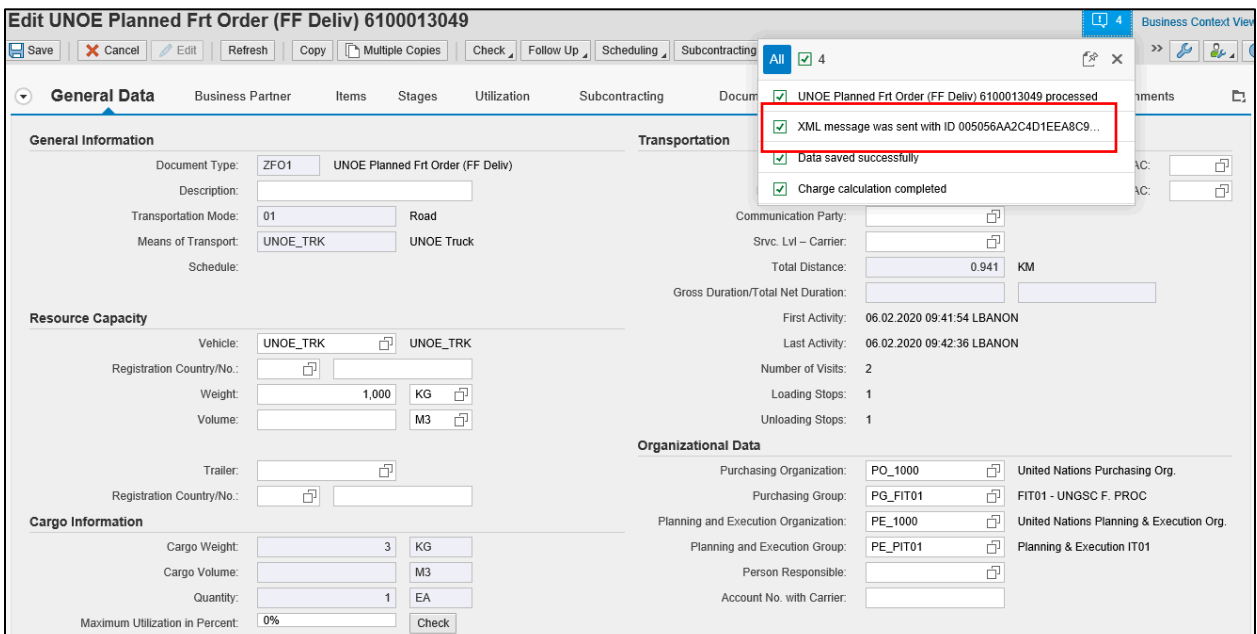
The action of “sending Freight Order details manually” can also be performed from a specific Freight Order window by opening the Freight Order. Click on Edit and click on Subcontracting



Click on “send to Carrier” from the drop down appearing on clicking the subcontracting icon. Click “ok” in the pop-up dialog box:



You will see the confirmation on the right-hand corner that the xml file was sent:



## Exceptions

- A. In case of any\_port source or destination, the below error will be seen in the upper right corner when you click on “send to Carrier” under the subcontracting icon in Edit mode:

The screenshot shows the 'Edit UNOE Planned Frt Order (FF Deliv) 6100013050' window. The error message 'Action cannot be performed due to location ANY\_PORT\_UAE' is displayed in a red box in the top right corner. The interface includes sections for 'Resource Capacity', 'Cargo Information', 'Source', and 'Destination'. The 'Source' location is set to 'ANY\_PORT\_UAE' (Dubai) and the 'Destination' location is 'NAQOURA\_PORT' (Naqoura). The error message is also visible in the top right corner of the window.

- B. In case of dummy\_carrier, the below error will appear if you click on “send to Carrier” under the subcontracting button in Edit mode:

The screenshot shows the 'Edit UNOE Planned Frt Order (FF Deliv) 6100013382' window. The error message 'Action cannot be performed due to carrier ZDUMMY\_CAR' is displayed in a red box in the top right corner. The interface is in the 'Subcontracting' tab, showing fields for 'Carrier' (ZDUMMY\_CAR), 'Subcontracting Relevance', and 'Freight Agreement Reference'. The error message is also visible in the top right corner of the window.

All events and documents updated by the goods vendor or freight forwarder through EDI will be automatically reflected in the TM system. This update occurs real time for the corresponding freight orders and will be visible to all TM roles (including display roles).

## Chapter 12. Reports in BI

Use BI for TM to effectively monitor TM transactions through Reports and Dashboards. All movements covered by the TM module:

- Troops (including LTC)
- Contingent Owned Equipments (COE)
- UN Owned Equipments (UNOE)
- Stock Transfer Requisition- Stock Transfer Order (STR-STO).

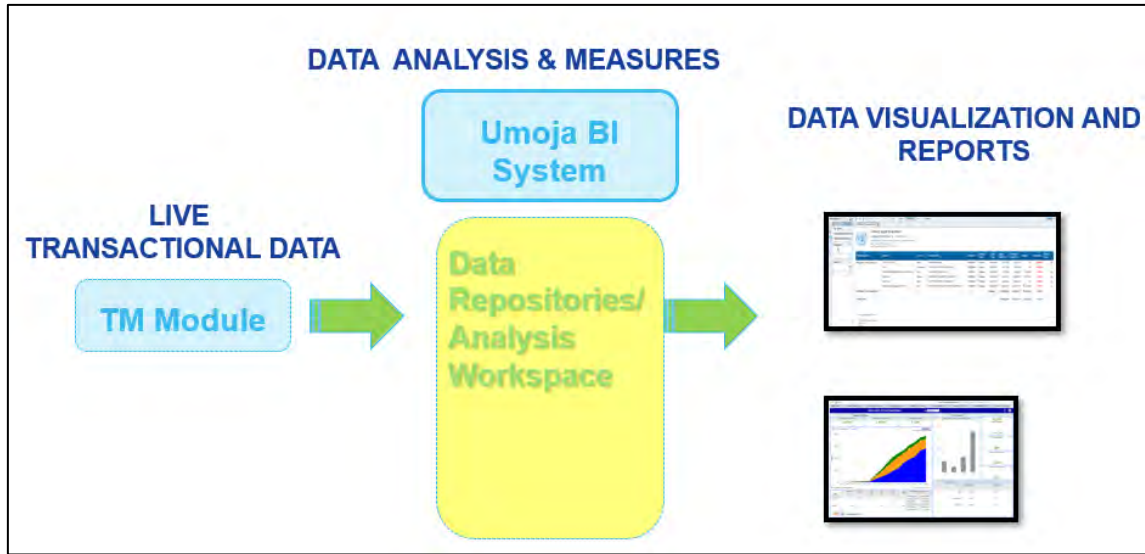
Three new roles were created for TM BI access.

- BI.84 BI:SC\_TMEM\_Basic User
- BI.85 BI:SC\_TMEM\_Analytic User
- BI.86 BI:SC\_TMEM\_Power User

The roles have the following access.

BI USER ROLE	Run Formatted Reports?	Save/Delete Copies to Favorites?	Create Ad hoc Analysis Reports?	Share Copies with Others?
BI.84 SC_TMEM_BASIC User	✓	✓		
BI.85 SC_TMEM_ANALYTIC User	✓	✓	✓	
BI.84 SC_TMEM_POWER User	✓	✓	✓	✓

The data in TM flow in real-time to BI for reporting. Below a visualization of the data flow.



### Existing Reports in BI

The BI reports offer running efficiently reports on TM data but also several KPIs were developed. Example for standard TM fields populated in BI reports.

Example of customized indicators (KPIs) for TM data.

REPORTS	DESCRIPTION	UNOE	STR/STO
Average Lead Time by Vendor	Average lead time i.e. delta between PO issue and delivery date for different goods vendors	✓	✓
Percentage of events submitted by carriers & vendors	Percentage of events submitted from all the event submission requirements by the different carriers and goods vendors	✓	✓
Average time between occurrence of event and submission of event for carriers & vendors	Delta between when an event took place and the date of reporting by the carrier/ vendor	✓	✓

The reports can be easily customized in BI by choosing the relevant fields.

### Existing Reports in PowerBI

Additionally, to the above BI reports, PowerBI dashboards were developed. It can be accessed through this link:

<https://app.powerbi.com/groups/me/apps/0d5fe1a8-754c-471b-b9d9-e81efd7e969d/dashboards/da6e5b12-0a2d-46ae-a2a4-c2935083c354>

## Access to Reports in BI

To request a role for BI, a training needs to be successfully completed including the final evaluation.

New Roles can be requested through the Security Liaison Officer (SLO). Please visit: [https://iseek.un.org/departamental\\_page/addmodifydelete-user](https://iseek.un.org/departamental_page/addmodifydelete-user)

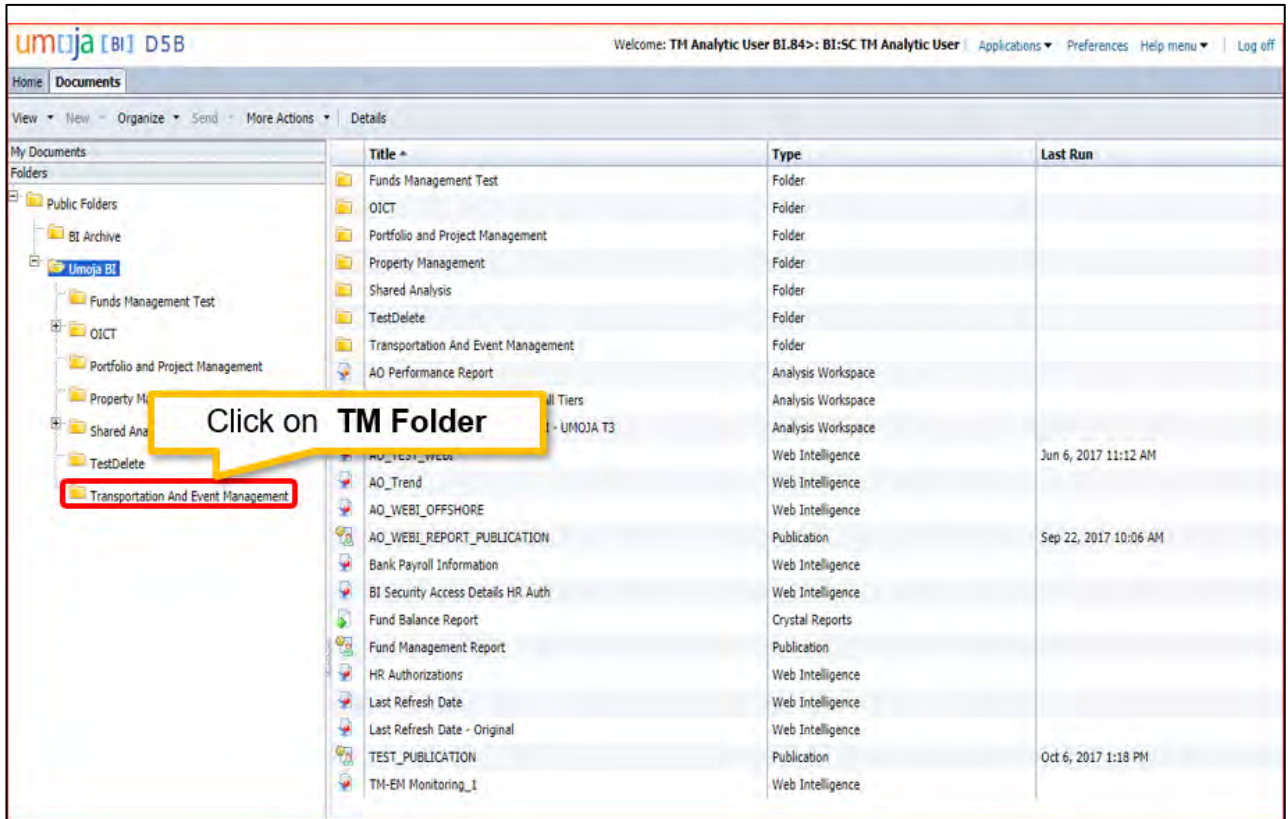
Further detailed information on functionality of each available TM role can be found in the role guide: [https://iseek.un.org/system/files/umoja\\_role\\_guide\\_published\\_4sept\\_2020.pdf](https://iseek.un.org/system/files/umoja_role_guide_published_4sept_2020.pdf)

To access reports in BI, please log into the Umoja Production environment. Choose the “BI Portal”.

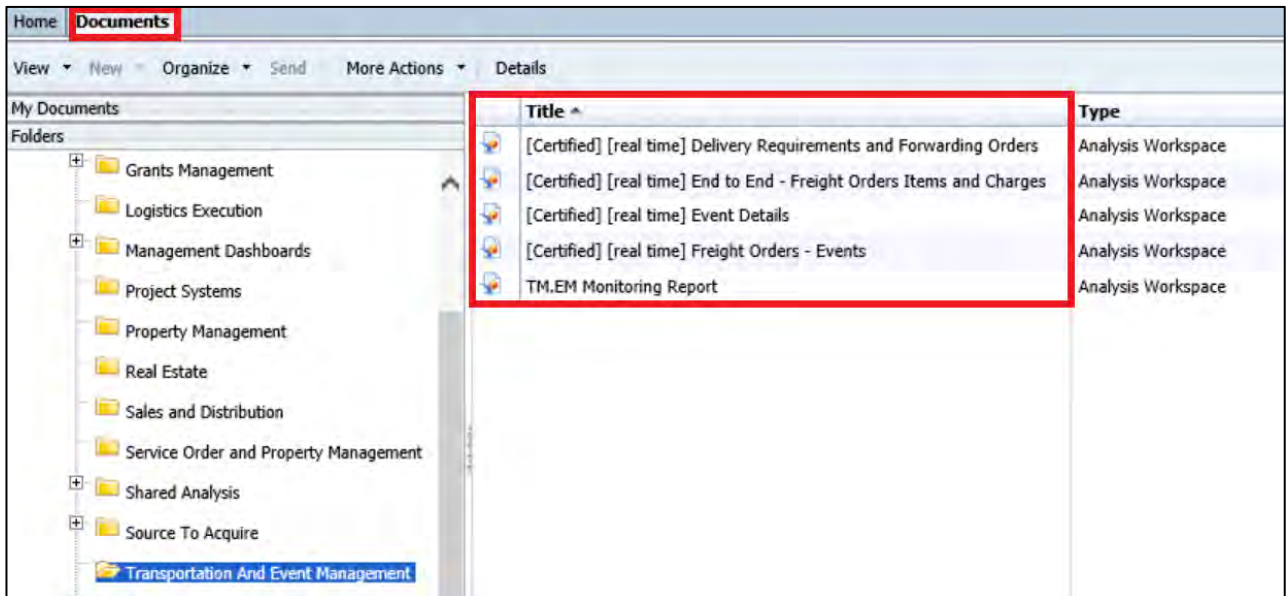


Go to the “Documents” tab on the upper left and choose “Transportation and Event Management”.

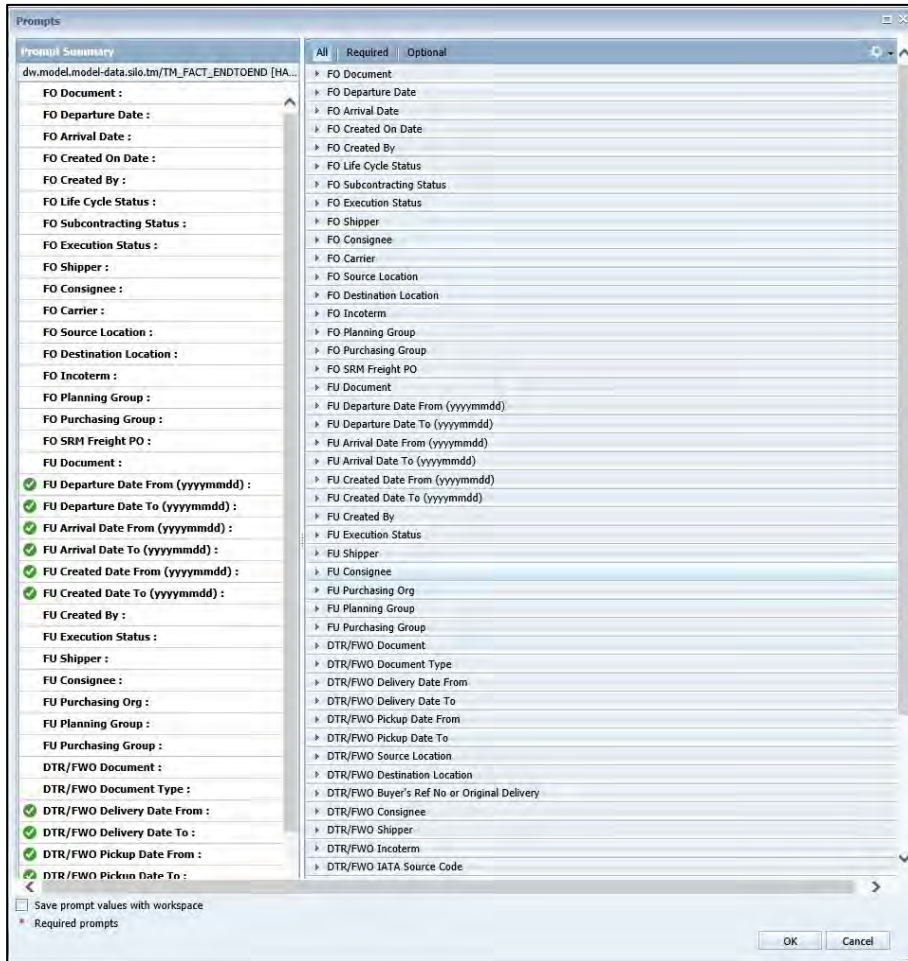





On the right all available TM reports are displayed. Double-click on the report to be run.

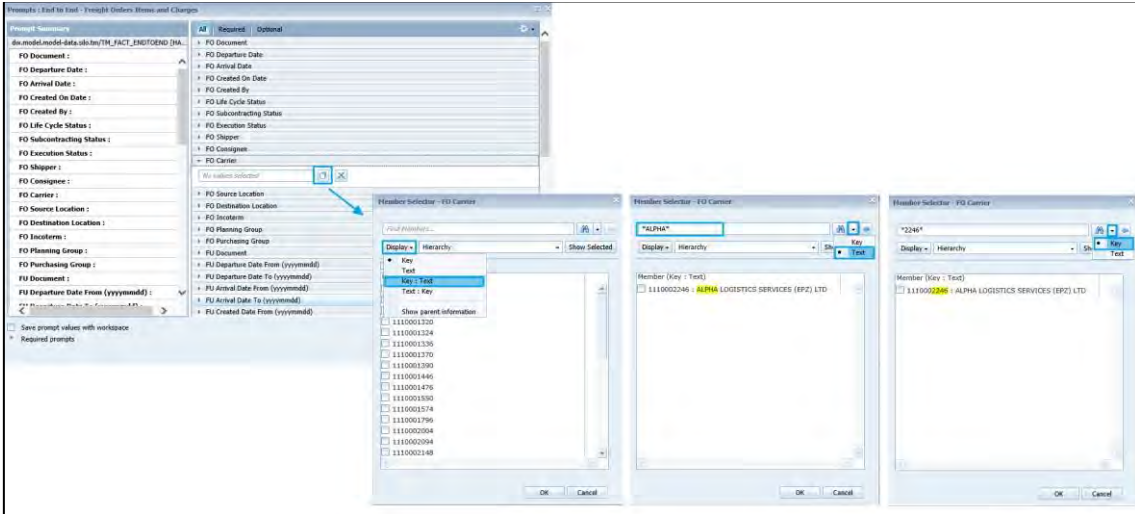


As soon as you open the report, the Prompts window will display. All prompts are optional entries.



It is recommended to use as many prompts as possible in order to have better response times while running and working with the report.

**Tip:** You may click on the  button to choose the values you are interested in any of the prompts. The wildcard \* may be useful to search broadly by Keys (e.g. \*2246) or by Descriptions (e.g. \*ALPHA\*):

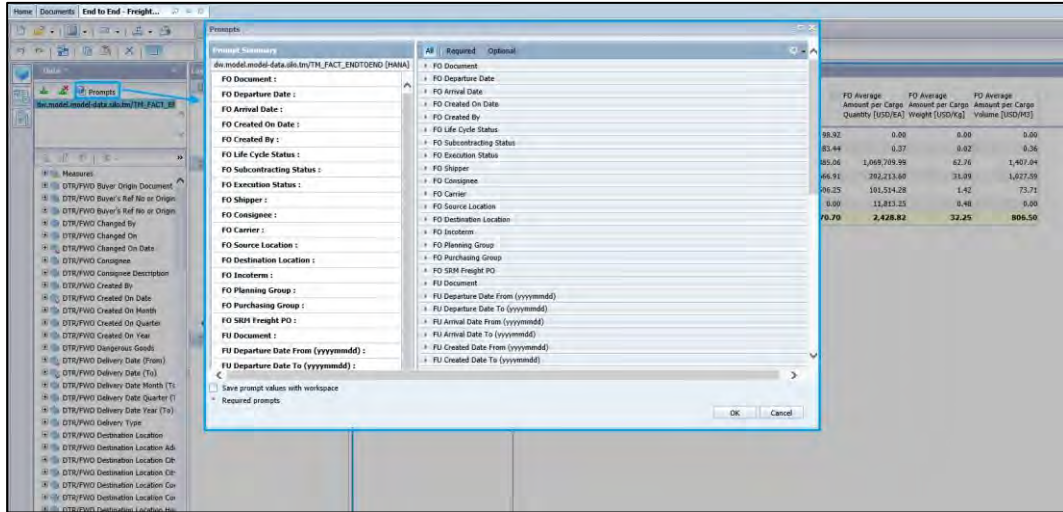


After entering the required filters, click **OK** and the report will run:

DTR/PWO Document Type Description	DTR/PWO Number of Documents	FO Item Total Amount [USD]	FO Average Total Cargo Quantity [EA]	FO Average Total Cargo Weight [Kg]	FO Average Total Cargo Volume [M3]	FO Average Amount per Cargo Quantity [USD/EA]	FO Average Amount per Cargo Weight [USD/Kg]	FO Average Amount per Cargo Volume [USD/M3]
DTR for STO	77	6.00	1.80	4.02	98.82	0.00	0.00	0.00
DTR for UNICE	315	401,317.00	2,087.59	26,330.81	2,183.44	0.37	0.82	0.36
Forwarding Order for COE Troops	251	2,240,805,874.92	5.11	87,496.77	3,885.38	1,095,790.59	62.76	1,487.64
Forwarding Order for Troops Land and Sea	248	487,617,894.28	13.55	98,740.84	2,666.81	392,213.60	31.99	1,827.59
Forwarding Order for Wide Body (LTC)	54	7,106,800.00	1.89	78,199.28	1,506.25	101,514.28	1.42	71.71
Total Result	1,344	2,950,865,019.31	654.38	49,272.13	1,970.70	2,428.82	32.25	806.58

## Refreshing the report

Once the report has been opened, you can decide to change the already selected filter values using the “Prompts” button:



## Export Report

You can export the report to Excel, PDF or CSV (text format) by clicking on the Export icon as seen below:



When the Export dialog box opens, make sure you select the required data to export using the available options, depending on the chosen export format.

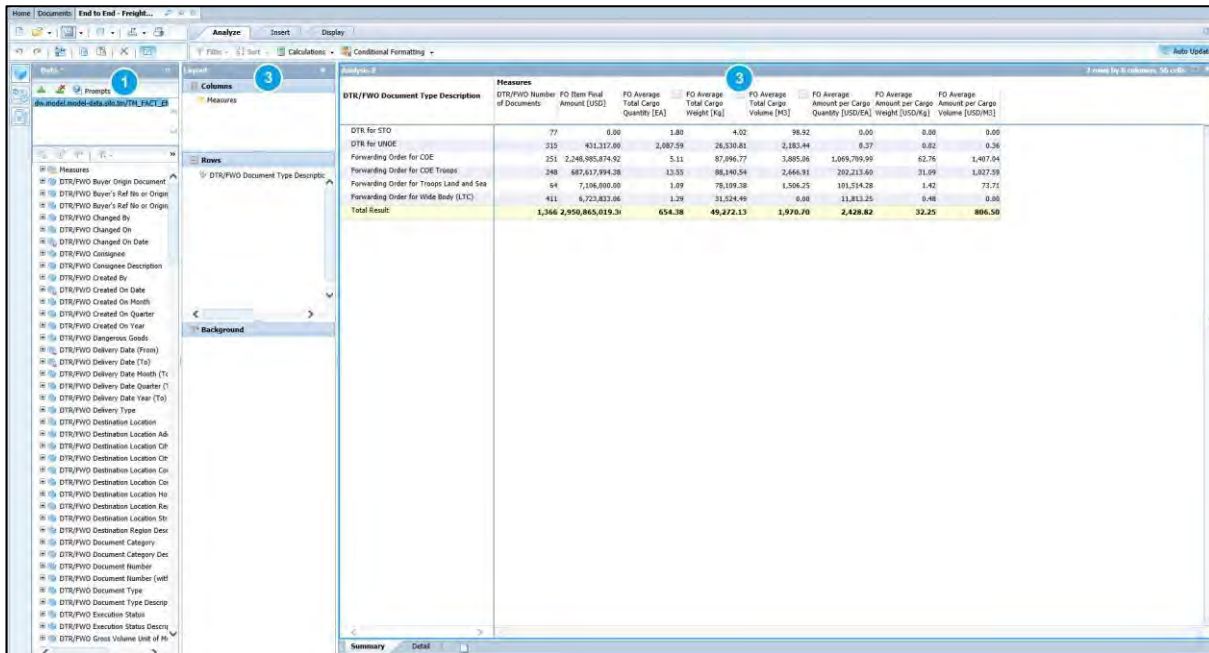
Furthermore, by clicking on "Repeat outer header members", each row of data will contain the header information for that data element. This is useful for exporting flat tables for further analysis in Excel.



A pop-up dialog will appear, where the option to open or save the file needs to be chosen.

### Structure of Analysis Workspace

The screenshot below highlights the main different navigational elements of an Analysis Workspace:



#### 1. Data Panel

The data panel displays the *Measures* and *Characteristics* available to use in the report. The data panel is used to select the required information to perform navigation functions, such as adding characteristics to rows or columns or including new background filters.

Measures and Characteristics are the main components of an Analysis Workspace:

- ✦ **Measure** 📊: Numerical values or metrics which are measured in the analysis (e.g. *FO Quantity*).
- ✦ **Characteristic** 🏷️: Fields in Umoja that are used to differentiate and analyse measures under different perspectives (e.g. *FO Product*).

## 2. Layout Panel

The *Layout panel* is the panel adjacent to the *Data panel* and here you can:

- ✦ Drag and drop different characteristics and measures into the Rows or Columns of your analysis, as with Pivot tables in Excel.
- ✦ Drag and drop one or more measures or characteristics as Background Filters to your analysis.
- ✦ Perform navigational operations on characteristics and measures including filtering, re-ordering and swapping objects.

## 3. Analysis Panel

The Analysis window is the primary part of the screen displaying the rows and columns in a spreadsheet form for the selected data. It is located on the right of the *Layout panel*. This window displays the core components of the Analysis Workspace report.

Normally, the measures for a specific Analysis Workspace are set in the *Columns Section* of the analysis, while characteristics are placed in the *Rows section*.

The Analysis Panel can contain more than one Tab with different analysis or charts.

## Layout of the Report

Analysis Workspaces have the following structure:

The screenshot shows the Umoja Analysis Workspace interface. The **Data Panel** on the left lists various measures and characteristics. The **Layout Panel** in the center shows the analysis structure with **Columns** (Measures) and **Rows** (DTR/WO Document Type Description). The **Analysis Panel** on the right displays a spreadsheet with the following data:

DTR/WO Number	FO Item Final Amount [USD]	FO Average Total Cargo Quantity [EA]	FO Average Total Cargo Weight [Kg]	FO Average Total Cargo Volume [M3]	FO Average Amount per Cargo Quantity [USD/EA]	FO Average Amount per Cargo Weight [USD/Kg]	FO Average Amount per Cargo Volume [USD/M3]
81	0.00	1.75	3.84	93.09	0.00	0.00	0.00
317	440,082.52	2,074.56			0.38	0.03	0.36
251	2,249,213,928.92	5.03			9,827.12	62.14	1,406.87
248	487,617,994.38	33.55			9,213.68	31.09	1,027.59
94	7,196,009.00	1.09			191,514.28	1.42	73.71
413	6,723,823.96	1.26	23,027.78	6.08	11,974.86	9.48	9.69
<b>Total Result</b>	<b>1,376,2951,101,838.81</b>	<b>647.30</b>	<b>48,912.08</b>	<b>1,951.09</b>	<b>2,426.46</b>	<b>32.11</b>	<b>805.00</b>

✦ **Data Panel**

It contains all the Characteristics and Measures that users may add to their ad-hoc analyses.

**Summary tab**

DTR/FWO Document Type Description	Measures								
	DTR/FWO Number of Documents	FO Item Final Amount [USD]	FO Average Total Cargo Quantity [EA]	FO Average Total Cargo Weight [Kg]	FO Average Total Cargo Volume [M3]	FO Average Amount per Cargo Quantity [USD/EA]	FO Average Amount per Cargo Weight [USD/Kg]	FO Average Amount per Cargo Volume [USD/M3]	
DTR for STO	81	0.00	5.25	11.53	279.26	0.00	0.00	0.00	
DTR for UNOE	323	717,951.00	3,219.68	75,295.33	6,325.52	0.39	0.01	0.20	
Forwarding Order for COE	253	2,249,213,928.92	5.03	86,605.09	3,842.12	1,069,827.12	62.14	1,400.87	
Forwarding Order for COE Troops	248	687,617,994.38	13.55	88,140.54	2,666.91	202,213.60	31.09	1,027.59	
Forwarding Order for Troops Land and Sea	64	7,106,000.00	1.09	78,109.38	1,506.25	101,514.28	1.42	73.71	
Forwarding Order for Wide Body (LTC)	423	6,723,833.06	1.30	31,406.04	0.00	11,343.32	0.47	0.00	
<b>Total Result</b>	<b>1,392</b>	<b>2,951,379,707.31</b>	<b>1,004.82</b>	<b>63,935.19</b>	<b>3,249.56</b>	<b>1,549.25</b>	<b>24.34</b>	<b>479.05</b>	

✦ **Columns Section**

It provides the following **Measures**:

- **DTR/FWO Number of Documents**
- **FO Item Final Amount [USD]**
- **FO Average Total Cargo Quantity [EA]**
- **FO Total Cargo Weight [Kg]**
- **FO Average Total Cargo Volume [M3]**
- **FO Average Amount per Cargo Quantity [USD/EA]**
- **FO Average Amount per Cargo Weight [USD/Kg]**
- **FO Average Amount per Cargo Volume [USD/M3]**

Note: All the average measures show average calculation per freight order documents, like the sample shown in below illustration:

DTR/FWO Document Type Description	Measures									
	DTR/FWO Number of Documents	FO Item Final Amount [USD]	FO Average Total Cargo Quantity [EA]	FO Average Total Cargo Weight [Kg]	FO Average Total Cargo Volume [M3]	FO Average Amount per Cargo Quantity [USD/EA]	FO Average Amount per Cargo Weight [USD/Kg]	FO Average Amount per Cargo Volume [USD/M3]	FO Total Cargo Weight [Kg]	FO Number of Documents
DTR for STO	81	0.00	5.25	11.53	279.26	0.00	0.00	0.00	1,753.20	152
DTR for UNOE	323	717,951.00	3,219.68	75,295.33	6,325.52	0.39	0.01	0.20	41,788,907.00	555
Forwarding Order for COE	253	2,249,213,928.92	5.03	86,605.09	3,842.12	1,069,827.12	62.14	1,400.87	33,516,170.18	387
Forwarding Order for COE Troops	248	687,617,994.38	13.55	88,140.54	2,666.91	202,213.60	31.09	1,027.59	21,946,995.00	249
Forwarding Order for Troops Land and Sea	64	7,106,000.00	1.09	78,109.38	1,506.25	101,514.28	1.42	73.71	4,999,000.00	64
Forwarding Order for Wide Body (LTC)	423	6,723,833.06	1.30	31,406.04	0.00	11,343.32	0.47	0.00	11,871,484.00	378
<b>Total Result</b>	<b>1,392</b>	<b>2,951,379,707.31</b>	<b>1,004.82</b>	<b>63,935.19</b>	<b>3,249.56</b>	<b>1,549.25</b>	<b>24.34</b>	<b>479.05</b>	<b>114,124,309.38</b>	<b>1,785</b>

$63,935.19 = 114,124,309.38 / 1,785$

✦ **Rows Section**

The Rows Section contains the characteristics or dimension attributes. In this tab, it contains the *DTR/FWO Document Type Description* as the default option to aggregate and visualize the measures.

## ✦ Background Filters

Background filters apply restriction of data to the entire Analysis, in this case there are no background filters applied by default.

## - Details tab

DTR/FWO Document Number	FU Document	FO Document	FO Source Location Address	FO Destination Location Address	FO Item Number	FO Item Type	FO Product	Measures							
								FO Average Total Cargo Quantity [EA]	FO Average Total Cargo Weight [Kg]	FO Item Final Amount [USD]	FO Average Total Cargo Volume [M3]	FO Average Amount per Cargo Weight [USD/Kg]	FO Average Amount per Cargo Volume [USD/M3]	FO Average Amount per Cargo Quantity [USD/EA]	
2100000356	4100001133	6100002255	Dakar	Niuzama Mission /DSGSDS Niuzama	0000000010	PRD	BREAKBULK	3.00	600.00	0.00	00.00	0.00	0.00	0.00	0.00
2100000355	4100001132	6100002249	Dakar	Niuzama Mission /DSGSDS Niuzama	0000000020	PRD	VEHICLE	1.00	1,900.00	0.00	150.00	0.00	0.00	0.00	0.00
2100000354	4100001131	6100002243	Dakar	Niuzama Mission /DSGSDS Niuzama	0000000020	PRD	VEHICLE	3.00	600.00	0.00	90.00	0.00	0.00	0.00	0.00
2100000352	4100001128	6100002237	Dakar	Niuzama Mission /DSGSDS Niuzama	0000000010	PRD	GENERATORS (LOADED INSIDE TEU)	4.00	1,900.00	0.00	150.00	0.00	0.00	0.00	0.00
2100000351	4100001127	6100002231	Dakar	Niuzama Mission /DSGSDS Niuzama	0000000020	PRD	BUS (12-24) NISSAN	3.00	400.00	0.00	60.00	0.00	0.00	0.00	0.00
2100000350	4100001126	6100002225	Dakar	Niuzama Mission /DSGSDS Niuzama	0000000010	PRD	GENERATORS (LOADED INSIDE TEU)	1.00	1,500.00	0.00	150.00	0.00	0.00	0.00	0.00
2100000349	4100001125	6100002219	Dakar	Niuzama Mission /DSGSDS Niuzama	0000000020	PRD	BUS (12-24) NISSAN	3.00	600.00	0.00	16.00	0.00	0.00	0.00	0.00
2100000348	4100001124	6100002213	Dakar	Niuzama Mission /DSGSDS Niuzama	0000000020	PRD	BUS (12-24) NISSAN	1.00	1,800.00	0.00	20.00	0.00	0.00	0.00	0.00
2100000347	4100001123	6100002207	Dakar	Niuzama Mission /DSGSDS Niuzama	0000000010	PRD	GENERATORS (LOADED INSIDE TEU)	3.00	600.00	0.00	16.00	0.00	0.00	0.00	0.00
2100000346	4100001122	6100002201	Dakar	Niuzama Mission /DSGSDS Niuzama	0000000020	PRD	BUS (12-24) NISSAN	1.00	1,900.00	0.00	20.00	0.00	0.00	0.00	0.00
2100000345	4100001121	6100002195	Dakar	Niuzama Mission /DSGSDS Niuzama	0000000010	PRD	VEHICLE	4.00	4,800.00	0.00	30.00	0.00	0.00	0.00	0.00
2100000344	4100001120	6100002189	Dakar	Niuzama Mission /DSGSDS Niuzama	0000000020	PRD	HOBART (EXTERNAL POWER) - LOGHOP	1.00	450.00	0.00	40.00	0.00	0.00	0.00	0.00
2100000343	4100001119	6100002183	Dakar	Niuzama Mission /DSGSDS Niuzama	0000000010	PRD	DG CONTAINERS	3.00	30,000.00	0.00	50.00	0.00	0.00	0.00	0.00

## ✦ Columns Section

It provides the following **Measures** by default:

- ✦ FO Average Total Cargo Quantity [EA]
- ✦ FO Average Total Cargo Weight [Kg]
- ✦ FO Item Final Amount [USD]
- ✦ FO Average Total Cargo Volume [M3]
- ✦ FO Average Amount per Cargo Weight [USD/Kg]
- ✦ FO Average Amount per Cargo Volume [USD/M3]
- ✦ FO Average Amount per Cargo Quantity [USD/EA]

Note: Averages are calculated dividing total amounts by the count of FO documents.

## ✦ Rows Section

The Rows Section contains the characteristics or dimension attributes. In this tab, it contains:

- ✦ DTR/FWO Document Number
- ✦ FU Document - FO Document
- ✦ FO Source Location Address
- ✦ FO Destination Location Address
- ✦ FO Item Number
- ✦ FO Item Type
- ✦ FO Product

## ✦ Background Filters

Background filters apply restriction of data to the entire Analysis, in this case there are no background filters applied by default.



Please refer to the next section Scope Determination to understand important concepts used in the background for the calculations.

### Scope determination

The below **conditions** apply in the logic selected to retrieve the data for the report:

- The report selects all Freight Order documents applying the restrictions selected by user in the prompts window while running the report.

### Additional Resources

NV301 Umoja Advanced BI Navigation guide:

[https://umoja.un.org/sites/umoja.un.org/files/nv301umoja\\_advanced\\_bi\\_navigation\\_cbt\\_v9.pdf](https://umoja.un.org/sites/umoja.un.org/files/nv301umoja_advanced_bi_navigation_cbt_v9.pdf)

### **User Guides for BI**

Several User Guides exist how to run BI reports and how the indicators were derived. Please refer to the Umoja Job Aid site. <https://umoja.un.org/content/job-aids>

Then scroll down to the Transportation Management section.

	<b>Transportation Management</b>
Transportation Management	<a href="#">Combine Freight - Generate a Combined Proposal</a>
Transportation Management	<a href="#">Freight Unit Location Change</a>
Transportation Management	<a href="#">Multi-Level Packaging</a>
Transportation Management	<a href="#">UN-owned Carrier</a>
Transportation Management	<a href="#">Using TM Map Analysis</a>
Transportation Management	<a href="#">Performing Packing on Inbound Delivery</a>
Transportation Management	<a href="#">Requesting TM Master Data</a>
Transportation Management	<a href="#">Electronic Data Interchange (EDI)</a>
Transportation Management - Business Intelligence	<a href="#">BI: Delivery Requirements and Forwarding Orders</a>
Transportation Management - Business Intelligence	<a href="#">BI: End to end - Freight Orders Items and Charges</a>
Transportation Management - Business Intelligence	<a href="#">BI: Freight Orders Events</a>
Transportation Management - Business Intelligence	<a href="#">BI: Event Details</a>

## Appendix and Reference Information

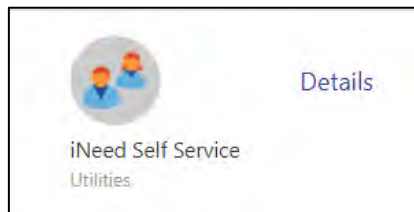
### TM related Acronyms

Acronym	Full Form
SRM	Supplier Relationship Management
ECC	ERP Central Component
TM	Transportation Management
BI	Business Intelligence
CCP	Carrier Collaboration Portal
IBD	Inbound Delivery
OBD	Outbound Delivery
SC	Shopping Cart
PO	Purchase Order
DTR	Delivery-based Transportation Requirement
FWO	Forwarding Order
FU	Freight Unit
FO	Freight Order
SOW	Statement of Work
RFO	Request for Offer
LOA	Letter of Assist
PAX	Passengers
LTC	Long Term Charter
STC	Short Term Charter

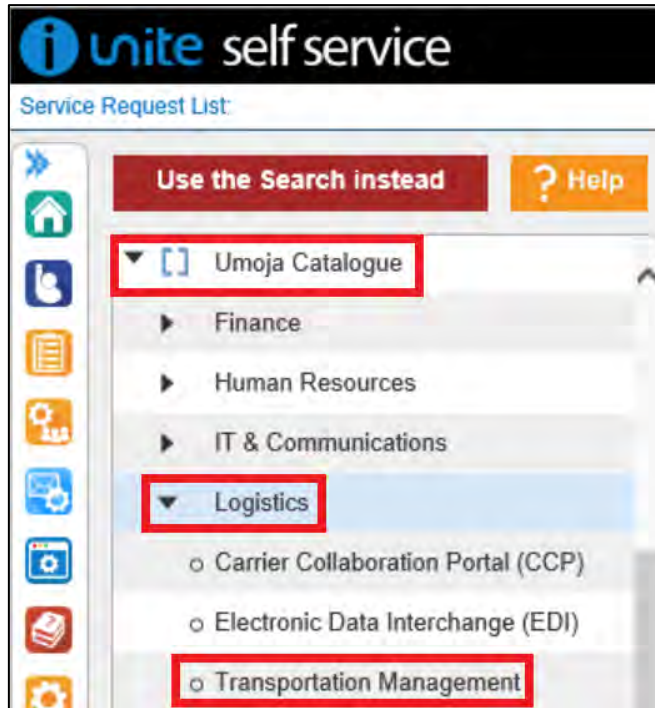
### TM Production Support

In case of TM production issues please log an iNeed ticket for the Umoja Support Centre ([umojasupport@un.org](mailto:umojasupport@un.org)), either through your local service desk or in iNeed directly. Please describe the encountered issue in detail and mention Transportation Management.

An iNeed ticket can be logged through the Self Service.



Choose from the “Umoja Catalogue” the “Logistics” section and then “Transportation Management”.



Choose the appropriate item from Transportation Management for the issue to be reported.



In case master data needs to be requested or changed please refer to section How to request Master Data for TM of this document.