



# GOODS REQUISITIONERS & BUYERS

## Integration Session

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

Elena Carrasco Comes / UCS Training Team, Valencia / Tuesday, October 15<sup>th</sup>, 2019

# CONTENTS AND LEARNING OBJECTIVES

The objective of this presentation is to raise awareness on the existing integration points between Source to Acquire process (executed in Umoja Supplier Relationship Management module, *SRM*) and the Umoja Transport Management module, *TM*.

Accurate completion of the points 1 to 7 below ensures a flawless data integration from SRM module to TM module:

1. Purchasing freight services
2. Delivery address/ performance location
3. Purchasing group
4. Incoterm key & location
5. Delivery date
6. Packing
7. Vendor
8. UNOE End to End process with touch points

# 1 PURCHASING FREIGHT SERVICES

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

No \$1 line for freight services

Line Number	Item Type	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit
1	Material		2100000224	Forklift,Indl,HD,Diesel,4x2	25101900	SpecializedVehicles	1	EA
2	Material		2100000284	Ambulance,Diesel,LHD,4x2	25101700	Safety,RescueVehicle	1	EA
3	Material		2100000468	Vhcl:GP,Diesel,LHD,4x4,HD	25101507	GP&UtilityVeh	1	EA
4	Material		2100000224	Forklift,Indl,HD,Diesel,4x2	25101900	SpecializedVehicles	1	EA
5	Material		2100000284	Ambulance,Diesel,LHD,4x2	25101700	Safety,RescueVehicle	1	EA
6	Material		2100000468	Vhcl:GP,Diesel,LHD,4x4,HD	25101507	GP&UtilityVeh	1	EA
7	Service		30000000	Freight:Multi-modal,air,Package	78400000	Mail,CargoServ	1	EA

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

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

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

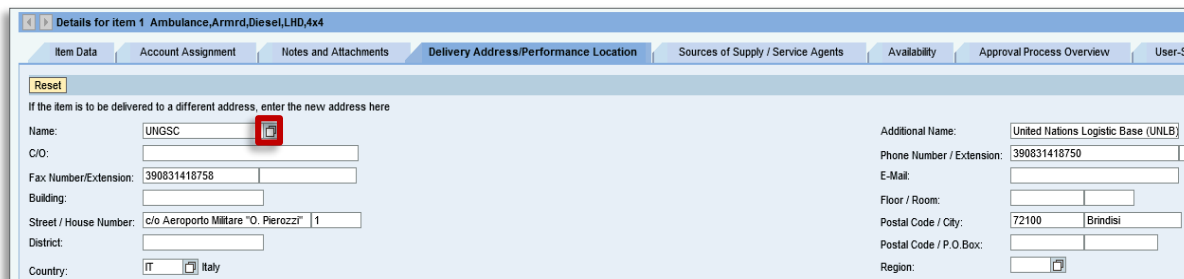
## 2 DELIVERY ADDRESS / PERFORMANCE LOCATION

Delivery address plays a pivotal role throughout *Requisitioning- Procurement- Inbound Coordination* processes. Therefore it is integrated in all four Umoja modules (*SRM, ECC, TM, CCP*) and in all documents (*Shopping Carts, Purchase Orders, Inbound Delivery, Delivery Transportation Requirement, Freight Unit and Freight Order*).

SRM

TM

### Shopping Cart: Delivery Address/ Performance Location



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

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

### DTR: Business Partner ->Consignee Address

General Data		Business Partner		Locations and Dates/Times		Document Flow		Notes		Blocking Information	
Party Role	Business Partner	Deviat... Address	Name	Street	House No.	Postal C...	City	Region (Desc.)			
Shipper	1110015341	<input type="checkbox"/>	International Armoured G...	P.O. Box 50060			Ras Al Khaimah				
Consignee	IT01	<input type="checkbox"/>	UN Logistics Base	Piazza del Vento ...		72011	Brindisi	Brindisi			

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

Destination		
Destination Location:	SPITA1	UNLB Brindisi
Delivery Date (From):	18.11.2019 12:00:00 CET	
Delivery Date (To):		
Earliest Delivery Date:		
Latest Delivery Date:		
Unloading Point:		
Address		
Street/House Number:	c/o Aeroporto Militare "O. Pierozzi"	
Postal Code/City:	72100	Brindisi
Region:	BR	Brindisi
Country:	IT	Italy

## 2 DELIVERY ADDRESS / PERFORMANCE LOCATION

1/2

Shopping Cart's delivery address adapts different terminology in the PO in SRM and in ECC:

SRM

ECC

Purchase Order:

United N

Ship- to Address

**SHIP TO:**  
 ATTN: UNGSC  
 c/o Aeroporto Militare "O. Pierozzi" , 1  
 Brindisi, 72100  
 Italy  
 Tel: 390831418750  
 Fax: 390831418758

Purchase Order:  
 Delivery Address

The screenshot shows the SAP ECC 'Delivery Address' form for item [ 1 ] 2100001218. The form includes the following fields and values:

Field	Value
Title	[Dropdown]
Name	UNGSC
Street/House number	United Nations Logistic Base (UNLB)
Postal Code/City	c/o Aeroporto Militare "O. Pierozzi" 1
Country	72100 Brindisi
Region	II Italy

Additional controls on the right side of the form include:

- Address details (with magnifying glass icon)
- Reset address (with refresh icon)
- Repeat address on (with copy icon)
- Address field (empty)
- Customer field (empty)
- Vendor field (empty) with checkbox  SC vend

# 2 DELIVERY ADDRESS / PERFORMANCE LOCATION

2/2

TM

FU:  
General Data -> Destination

**Destination**

Location:  UNLB Brindisi  
 UNGSC / c/o Aeroporto Militare "O. Pierozzi" 1 / I-72100 Brindisi BR

FU:  
Business Partner -> Consignee:

General Data		<b>Business Partner</b>	Document Flow	Notes	Attachments	Direct Shipment Options	Statuses	Administrative Data		
Actions	Party Role	Business Partner	Origin of Entry	Devia... Address	Name	Street	H... Numt	Post... City	Region	Country
	Shipper	1110015341	Automatic Shippe...	<input type="checkbox"/>	International Arm...	P.O. Box 50060		Ras Al Khaimah		AE
	Consignee	IT01	Automatic Shippe...	<input type="checkbox"/>	UN Logistics Base	Piazza del Vento ...	72011	Brindisi	BR	IT

FO:  
Business Partner -> Consignee

FO [on- leg]:  
General Data -> Destination.

**Display UNOE Vendor Delivered Frt Order (VNDelv) 6100028268**

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

General Data		<b>Business Partner</b>	Items	Stages	Utilization	Subcontracting	Document Flow	Charges	Execution	Notes	Attach
Actions	Party Role	Business Partner	Origin of Entry	Devia... Address	Name	Street	H... Numt	Post... City	Region	Country	
	Shipper	1110015341	Automatic Shippe...	<input type="checkbox"/>	International Arm...	P.O. Box 50060		Ras Al Khaimah		AE	
	Consignee	IT01	Automatic Shippe...	<input type="checkbox"/>	UN Logistics Base	Piazza del Vento ...	72011	Brindisi	BR	IT	

## 3 PURCHASING GROUP

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

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

### In a Shopping Cart

Organization

Purchasing Group: UNGSC - Procurement Unit -1 Show Mem

Company Code: UNIFIL Proc Unit - 1

Further Properties: LOA Procurement

Supplier Product Number: PD Aviation Team

Subcontracting: PD Vehicles Team

UN Fields: UNSOS - Procurement Unit -1

Reference Main Item: UNGSC - Procurement Unit -1

Main Item Line Number: MINUSMA - Procurement Unit 1

UNTSO - Procurement Unit

PD Buy Supervisor

NYCC HR CIC

### In a Purchase Order

Purchasing Group: \* UNGSC - Procurement Unit -1 Show Members

Total Value (Net):

Purchasing Group Members

Name	Telephone Number	Extension
03TMSABUY 03TMSABUY		
04TMSABUY 04TMSABUY		

Cancel

### 3 PURCHASING GROUP

Purchasing group (SRM) defaults the Freight Procurement Purchasing Group (SRM & TM) and Planning & Execution Group (TM) of the Freight Unit.

Organizational Data		
Purchasing Organization:	PO_1000	United Nations Purchasing Org.
Purchasing Group:	PG_FIT01	FIT01 - UNGSC F. PROC
Planning and Execution Organization:	PE_1000	United Nations Planning & Execution Org.
Org. Unit Group:	PE_PIT01	Planning & Execution IT01

Purchasing group (SRM) defaults the Sales Group (TM) in the Delivery Transportation Requirement

Display DTR for UNOE 110000622 (Inbound Delivery 180075806)

Save Cancel Edit Refresh Follow Up

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

Delivery Details	Shipping	Quantities	Statuses	Organizational Data
Document Type: ZD01	Delivery Priority:	Gross Volume: 49.83	Life Cycle Status: In Planning	Sales Organization: SO_1000
Original Delivery: Inbound Delivery	Transportation Mode:	Gross Weight: 7,500	Execution Status: Execution Not Started	Sales Office:
Delivery Type: EL		Net Weight: 7,500	Planning Status: Partially Planned	Sales Group: SG_381
Service Lvl – Sales:			Delivery Blocked: Not Blocked	United Nations Sales Org.
			Shipment Planning Blocked: Not Blocked	
			Planning Block: Not Blocked	
			Execution Block: Not Blocked	



## 4 INCOTERM KEY & LOCATION

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

### Shopping Cart:

SRM

- ✓ When items are selected from the contract catalog -> incoterm is not derived and needs to be entered manually
- ✓ When items are not from contract catalog, or its an unfunded shopping cart -> incoterm can be left blank

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

### Purchase Order:

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

## 5 DELIVERY DATE

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

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

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

Overview																	
Header																	
Items																	
Notes and Attachments																	
Approval																	
Tracking																	
▼ Item Overview																	
<input type="button" value="Details"/> <input type="button" value="Add Item"/> <input type="button" value="Copy"/> <input type="button" value="Paste"/> <input type="button" value="Duplicate"/> <input type="button" value="Delete"/> <input type="button" value="Undelete"/> <input type="button" value="Propose Sources of Supply"/> <input type="button" value="Add Condition"/> <input type="button" value="Remove Condition"/> <input type="button" value="Exercise Option"/> <input type="button" value="Order as Direct Material"/> <input type="button" value="Process All Items"/>																	
Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date
1		Material	1	2100001218	Ambulance,Armr,d,Diesel,LHD,4x4	25101700	1	EA	139,000.00	USD	1	134,830.00			MUL		20.12.2019

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

**Destination**

Location: SPITA1 UNLB Brindisi  
 UNGSC / c/o Aeroporto Militare "O. Pierozzi" 1 / I-72100 Brindisi BR

Start Date (Acceptable):  00:00:00 CET

Start Date (Requested): 20.12.2019 00:00:00 CET

End Date (Requested): 27.12.2019 23:59:59 CET

End Date (Acceptable):  00:00:00 CET

Unloading Date:  00:00:00 CET

## 5 DELIVERY DATE

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

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

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

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

**Display UNOE Planned Frt Unit 4100001350**

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

General Data **Stages** Business Partner Document Flow Notes Attachments Direct Shipment Options Statuses Adm

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

Stage De...	Stage Type	Transportation Mode	Source Location	Requested Pick-Up Date	Requested Delivery Date	City (Source)	City (Destination)	Destination Location
Stage 1			SU1110015341		27.12.2019	Ras Al Khaimah	Dubai	DUBAI_PORT
Stage 2			DUBAI_PORT	20.12.2019	27.12.2019	Dubai	Brindisi	SPITA1

## 5 DELIVERY DATE

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

**Display DTR for UNOE 110000622 (Inbound Delivery 180075806)**

Save Cancel Edit Refresh Follow Up

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

Source		Destination	
Source Location:	SU1110015341	International Armoured Group FZE	Destination Location: SPITA1 UNLB Brindisi
Pick-Up Date (From):			<b>Delivery Date (From): 18.11.2019 12:00:00 CET</b>
Pick-Up Date (To):			Delivery Date (To):
Earliest Pick-Up Date:			Earliest Delivery Date:
Latest Pick-Up Date:			Latest Delivery Date:
			Unloading Point:

## 6 PACKING

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

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

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

*Includes goods+ packaging material's information*

# 7 VENDOR

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

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

Number	2200099044	Smart Number	UNOE SRM ECC TM IntegDemo Elena 2	Type	Goods and Services	Status		
<p><b>Overview</b>   Header   Items   Notes and Attachments   Approval   Tracking</p>								
<b>General Header Data</b>								
Smart Number:	UNOE SRM ECC TM IntegDemo							
	<input type="checkbox"/> Smart Number is External							
Purchase Order Number:	2200099044							
Supplier: *	1110015341	<a href="#">International Armoured Group FZE</a>						
Requester: *	1110098066	<a href="#">11TMSAREQDRP 11TMSAREQDRP</a>					11TMSAREQDRP	11TMSAREQDRP
Recipient: *	1110098066	<a href="#">11TMSAREQDRP 11TMSAREQDRP</a>					11TMSAREQDRP	11TMSAREQDRP
Location:	1110000019	<a href="#">UN Logistics Base</a>						
Ship-To Address:	1110014833	<a href="#">UNGSC</a>						
Purchasing Organization: *	<a href="#">UN Purchasing Organization</a>							
Purchasing Group: *	<a href="#">UNGSC - Procurement Unit -1</a>							
Total Value (Net):	134,830.00	USD						

**Display UNOE Vendor Delivered Frt Order (VNDelv) 6100028281**

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 | No

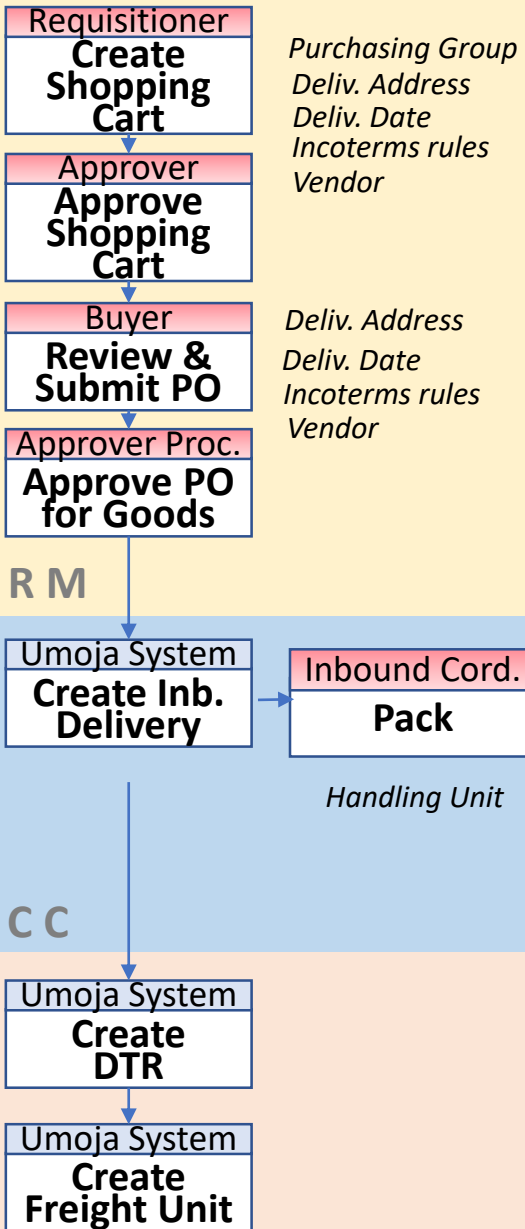
Actions	Party Role	Business Partner	Origin of Entry	Devia... Address	Name	Street	H... Numt	Post...	City
	Shipper	1110015341	Automatic Shippe...	<input type="checkbox"/>	International Armoured ...	P.O. Box 50060			Ras Al Khaimah
	Consignee	IT01	Automatic Shippe...	<input type="checkbox"/>	UN Logistics Base	Piazza del Vento ...		72011	Brindisi
	Carrier	1110015341	Manual Entry	<input type="checkbox"/>	International Armoured ...	P.O. Box 50060			Ras Al Khaimah
	Executing Carrier		Manual Entry	<input type="checkbox"/>					

## TM RELATED ACRONYMS

ACRONYM	FULL FORM	ACRONYM	FULL FORM
<b>SRM</b>	Supplier Relationship Management	<b>DTR</b>	Delivery-based Transportation Requirement
<b>ECC</b>	ERP Central Component	<b>FWO</b>	Forwarding Order
<b>TM</b>	Transportation Management	<b>LOA</b>	Letter of Assist
<b>CCP</b>	Carrier Collaboration Portal	<b>FU</b>	Freight Unit
<b>IBD</b>	Inbound Delivery	<b>PO</b>	Purchase Order
<b>SC</b>	Shopping Cart	<b>SOW</b>	Statement of Work

# PROCURE

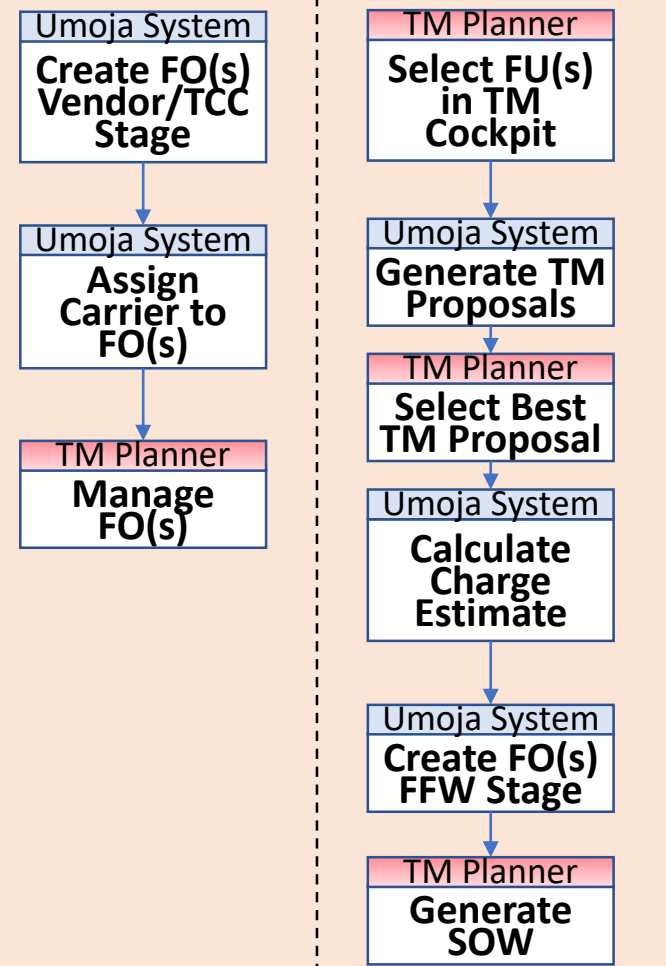
UNOE



# PLAN

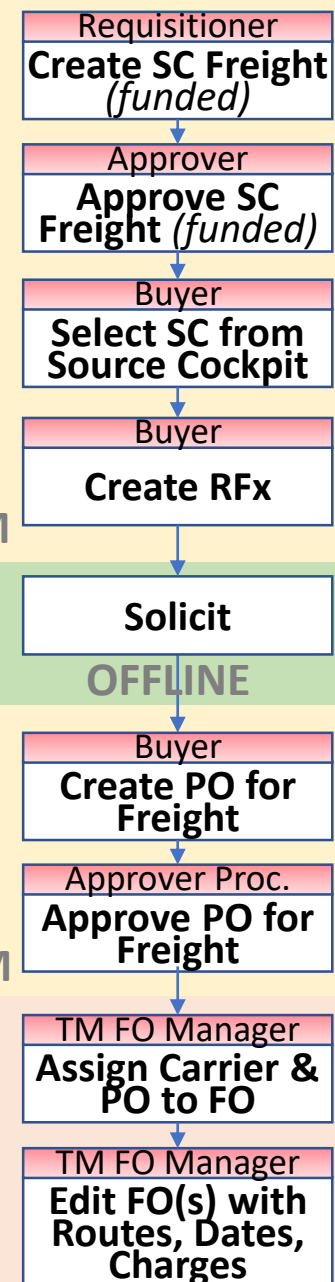
**Goods Vendor Stage**  
FCA/FOB/ DAT/ DAP

**Freight Forwarder Stage**  
EXW / FCA/ FOB/ DAT



# PROCURE FREIGHT

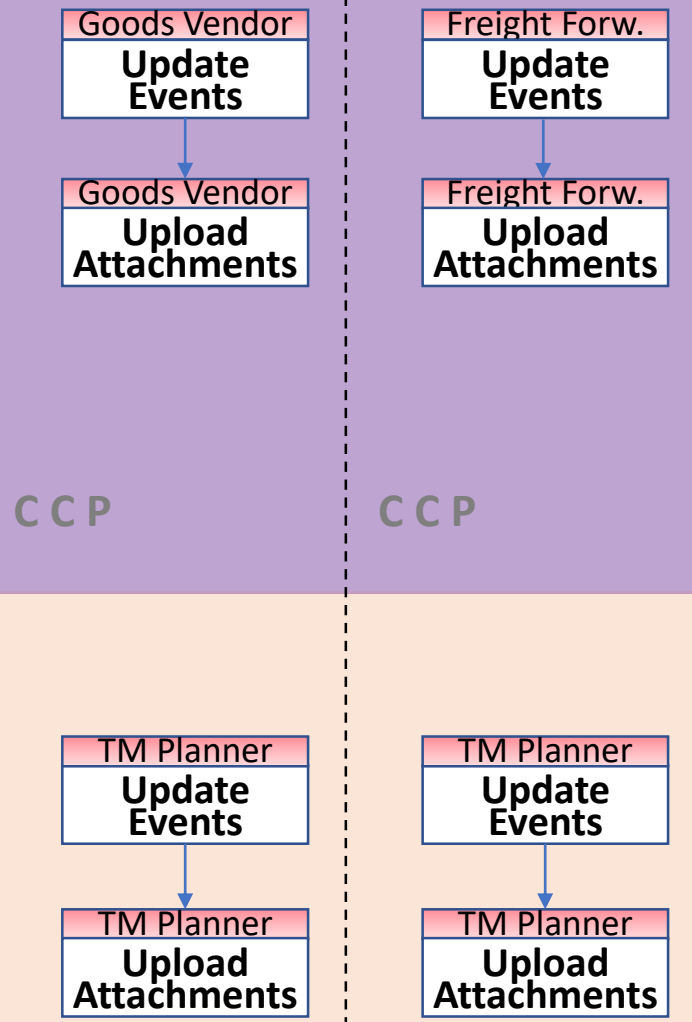
EXW / FCA/ FOB/ DAT



# EXECUTE & MONITOR

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

**Freight Forwarder Stage**  
EXW / FCA/ FOB/ DAT



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THANK YOU!

Questions?



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