

Exercise: UN Owned Equipment - DAT Scenario TM Planners.

Introduction

The objective of this exercise is to provide condensed information on how the transport management of UNOE DAT scenario automatically calculates on behalf of the vendor the most suitable route, preparing the ground for vendor to insert events or the TM planner of vendor’s behalf. It will also propose leg for the last piece of transportation, form designated terminal to Delivery Address of the plant.

In DAT incoterms rules, transfer of ownership happens at receiving entity’s terminal. In terms of transport management, the overall task is shared among vendor’s and entity’s responsibility.

This exercise shows the student that Umoja TM module allows to track and have visibility on vendor leg’s responsibility and decide on entity’s share of responsibility.

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1. Search for your inbound delivery

- Umoja Component: **SAP NWBC (NetWeaver Business Client)**
- User: **TS.01: TM planner & Execution**

Log in to the TM module using the credentials as TM planner & Execution provided in your Cover Page. Follow the steps below:

- Select the **ERP Logistics Integration** tab
- Click on the **Overview Transportation Requirements** from the menu option.
- Under the Delivery Based Transportation Requirements header, enter your **Inbound Delivery** number in the **Original Delivery** field and click on the **Apply** button.
- The **DTR** linked to the Inbound Delivery displays. Related documents and their details can be viewed by scrolling from left to right. Take some time to review each column.

2. Check Delivery Transportation Requirement document:

Click on the DTR number and navigate through the different tabs displayed: General Data, Business Partner, Location Date/ Time, Document Flow, Notes, Administrative Data.

Click on the **Document Flow** tab to view documents automatically associated with the DTR number selected.

General Data tab:

Familiarize yourself: Header Details are successfully displayed. 1. Document Type, 2. Delivery Type 3. Lifecycle status 4. Execution Status 5. Planning Status 6. Incoterm 7. Incoterm Location 8. Incoterm location (Free text)

Document Type: **ZD01**

Original Delivery: **Inbound Delivery**

Delivery Type: **EL**

Sales Organization: **SO_1000**

Sales Group: **Sales Group corresponding to the Purchasing Group on the PO**

Incoterm: **DAT**

Incoterm Location: **Haifa Port**

Item Details are successfully displayed as well 1. Material Number 2. Material Description 3. Delivery Quantity 4. Unit of Measure 5. Weight (Gross, Net)

Business Partner tab:

It shows the list of business partners. Data displayed should match the PO

1. Shipper: **Caterpillar (Belfast, UK) ('Vendor' in the Purchase Order)**

2. Consignee **UNSCO (Jerusalem, Israel) ('Ship To' in the Purchase Order)**

Location/ Date/ Times tab:

Under this tab the TM Planner can view all details related to Source & Destination.

Source

Source Location: Is equal to the vendor Location (SU+BP Number) followed by the vendor name.

Destination

Destination Location: would be the Goods Receiving Point Location corresponding to the Delivery Location Address maintained in the Goods PO (Shipping Point Location)

Address: Displays the addresses of the Source & Destination Location.

Delivery Date (From) & Time / Pick-Up Date (From) & Time would be populated according to the Incoterm from the Delivery Date & Time from Inbound Delivery. Other Dates would be blank.

Administrative Data tab:

Administrative Data information displays details related to the user who has created the document and the one who has changed it.

Created By & On/At: User Id, Date & Time created

Changed By & On/At: User Id, Date & Time of last change

Finally, return to the Document Flow tab to navigate from the DTR document to the [Freight Unit](#) document.

Document Hierarchy details are successfully displayed. DTR is in 'planning' status. The associated inbound delivery number is displayed as a predecessor document. For the vendor delivered leg(s) freight order exists (automatically created).

3. Check the generated Freight Unit:

When navigating from one document to another in the Transportation Management system the tabs containing details of each document are generally the same. However, the details in them differ depending on the document viewed.

General Data tab (Freight Unit):

Description: Shows the Inbound Delivery Number

Freight Unit Type: incoterm rules DAT=> ZFU1 (UNOE Planned Frt Unit)

Incoterm: from the Inbound Delivery

Incoterm Location: is the incoterm location stated in the inbound delivery (Haifa_ Port)

Description: Inbound Delivery number, extracted from ECC

Freight Unit Building Rule: Is Incoterm dependent. For incoterm rule DAT => ZFUB_ITM_UNOE

Source: Location is displayed as the vendor Location (SU + vendor BP number), Vendor's name and its corresponding address.

Destination: Location is displayed as the shipping point Location (SP + Shipping Point Code), destination name and its corresponding address.

Start Date Requested is displayed as the delivery date/time of the inbound delivery document

End Date Requested is displayed as the delivery date/time of the inbound delivery document

End Date Acceptable is displayed as the delivery date/time of the inbound delivery document with 23:59:59 as the time

Purchasing Organization: United Nations Purchasing Organization (always)

Purchasing Group: Purchasing Group as Shopping Cart

Planning and Execution Organization: United Nations Planning and Execution Org (always)

Org Unit Group: IL20 (plant based)

At the bottom of the page, you will see the Product id, its packing information (if applicable) and its measurements. In the screenshot below, no packing has been done:

Business Partner tab (Freight Unit):

The following information are successfully displayed. 1. Shipper which is the vendor (Vendor#, Vendor Name: Lenovo) 2. Consignee which is the Receiving Location (UNSCO) 3. Carrier as blank 4. Executing Carrier as blank.

Document Flow tab (Freight Unit):

Predecessor document is set as (1) Delivery based Transportation Requirement document number and (2) Inbound Delivery Document number. Associated documents are displayed along with its current statuses.

Statuses tab (Freight Unit):

The Status details of the Freight Unit are displayed. The **Life Cycle Status** changes according to what stage the FU is in. Note, the planning and execution Statuses also change according to the status of the transportation plan. Question: What does planning status “partially planned” mean in this scenario?

Administrative tab (Freight Unit):

Administrative Data details are successfully displayed. Created By, Created Date/Time as well as Changed By and Changed On Date/Time are displayed.

Stages tab (Freight Unit):

Note: This is a very useful tab for TM planners as it shows the route, broken down by the legs. TM planner can view in a snapshot the Freight Orders automatically created and the Freight Orders to be created by him or his colleagues:

Display UNOE Planned Frt Unit 4100001468

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

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

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

Stage Description	Stage Type	Transportation Mode	Source Location	UNL... (Source)	IATA Code (Source)	City (Source)	Requested Pick-Up Date	Requ... Pick-Up Time	Requ... Pick-Up Time Zone	Departure Date	Depar... Time	Depar... Time Zone
Stage 1		01 (Road)	SU1110001468			Belfast		00:00:00	GMTUK	02.10.2019	05:00:00	GMTUK
Stage 2		03 (Sea)	BRINDISI_PORT			Brindisi	26.11.2019	07:34:27	CET	26.11.2019	07:34:27	CET
Stage 3			HAIFA_PORT			Haifa	02.12.2019	00:00:00	ISRAEL		00:00:00	ISRAEL

DAT =>

The stages are divided into a number of stages, according to the transportation network (Umoja Master Data). In this particular example, we have 3 stages

Stage 1 is from Source Location (vendor) to the destination location of the transportation mean (road) which is NOT the Incoterm location defined in the inbound delivery document. In this case, destination location of Stage 2 is the handover location

4. Check the generated Freight Order:

From any document, documents that are already available can be accessed in the Document Flow tab. In DAP scenarios you will not see the Freight Orders pending to be generated by TM planners.

FOs will follow a route generated by Umoja based on the Transportation Network Master Data. This is the route that Umoja assumes that the vendor will select. According to the generated route, the legs (Freight Orders) and events will be posted in CCP for the vendor to insert updates. UN will track the shipment but not plan it. Hence the FO with defaulted route will be generated by the system and be ready for tracking in CCP/ TM.

Familiarize yourself with the FOs by clicking its numbers.

Note: If TM planner is to manually re-define the entire route (with new legs), Umoja TM allows TM planner to delete the automatically created FO and replace them by manually created FOs, so that they reflect the real route that the vendor will take.

5. Plan Transportation:

TM planners will plan transportation (selection of most cost-effective route) for all the legs stated from incoterm rules selected to final destination.

- Umoja Component: **SAP NWBC (NetWeaver Business Client)**
- User: **TS.01: TM planner & Execution**

Select the Planning Tab and click on Transportation Cockpit option.

6. Selection of Planning profile:

The TS.01 role is mapped by mission and document (UNOE or STO). As a result, TM planner will typically have visibility corresponding to her his planning profile.

If not done, you need to configure your planning profile.

Note: *Grid layout can be changed by clicking Switch Start Screen -> Profile and layout.*

From the grid of planning profile displayed, select UNOE non- DAP by clicking on the grey box on the left of the line and hitting the button Continue.

The area on the top left of the screen lists all Freight Units who are missing to be planned partially, i.e. at least one leg is to be planned.

Familiarize yourself with the information displayed in the columns. Add fields to your taste by clicking the Edit button:

You can also change the order of the columns by dragging and dropping.

7. Selection of Transportation Proposal:

Once the Cockpit is organized conveniently, search for the Freight Unit to Plant transportation for. To do so, use the Magnifying Glass field at the top right corner. The FU you are looking for will be highlighted in yellow.

Select your Freight Unit (all stages linked to your Freight Unit have to be selected) and click on **Transportation Proposals**.

The system generates a number of Transportation Proposals according to the Source and Destination Locations. Select the best option according to Cost, Means of Transport, Duration, amount of Stages, etc...

There are filtering and Sorting options available in order to further define your search

Select the Proposal you consider more convenient by checking the check box next to the Proposal number and click on Accept planning.

After selecting the route and accept planning Freight Order(s) get created on the top right of the cockpit. There is one FO for each leg per means of transport.

Click Save button to create the FOs

In this case 1 new FO have been generated by TM planner.

Note: hovering the mouse over the new Freight order provides an overview with information. Note that Carrier appears as Dummy Carrier.

Search your inbound delivery, click Document Flow tab and check that new Freight Orders have been added.

-----End of exercise-----