TM LPE-T WORKSHOP

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

Bryan Barrachina
Elena Carrasco
David Redondo
Cyrille Momo

UCS Training Team

Tuesday, October 22, 2019
# TRANSPORTATION MANAGEMENT ENTERPRISE ROLES

## UNOE
- **TS.01** TM TRANSPORTATION PLANNER
- **TS.02** TM MANAGE FREIGHT ORDER
- **TS.03** TM DISPLAY ALL

## INTER & INTRA Mission Transfers
- **TS.07** TM STO TRANSPORTATION PLANNER
- **TS.08** TM STO FREIGHT PROCUREMENT
- **TS.09** TM STO DISPLAY ALL

## Additional Roles
- **TS.04** TM MASTER DATA MAINTAINER
- **TS.05** COLLABORATION PORTAL
- **TS.06** TM EM PRODUCTION SUPPORT
TS.01 TM TRANSPORTATION PLANNER

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

- Allows the user to estimate the charges, download and print preview the statement of work (SOW)
- Allows the user to submit expected and unexpected events against the freight order in TM system.

TS.02 TM MANAGE FREIGHT ORDER

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

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

TS.03 TM DISPLAY ALL

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

- Display / Query DTR. Display / Query Freight Unit: Display / Query Freight Orders: Display events against the freight order:
TRANSPORTATION MANAGEMENT ENTERPRISE ROLES

**TS.07 TM STO TRANSPORTATION PLANNER**

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


**TS.08 TM STO FREIGHT PROCUREMENT**

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

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

**TS.09 TM STO DISPLAY ALL**

The TS.09 TM STO Display All provides display and query functions only. In Umoja, the Transportation Management STO Display Enterprise role in TM provides access to the following Functions: Query OBD. Display / Query DTR for Inter and/or Intra-mission movements. Display / Query Forwarding Order (COE/Troops). Display / Query Freight Unit. Display / Query Freight Orders. Display events against the freight order
Once the Inbound/Outbound Delivery is created in ECC, the system automatically generates the following document in TM: a Delivery-based Transportation Requirement (DTR)

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

The Delivery-based Transportation Requirement (DTR) document represents a transportation demand based on a delivery.
Once the **Inbound Delivery** & **Outbound Delivery** documents are created in ECC, the system automatically creates the following documents in TM: a **Freight Unit** (FU).

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

**A Freight Unit** (FU) represent a set of goods that are transported together across the entire transportation chain.
The Transportation Cockpit allows TS.01 & TS.07 to Manage Transportation for Freight Units and generate Transportation Proposals.
The transportation planning for a single Freight Unit is the simplest way of planning transportation. Selecting a single FU will have Umoja generate Transportation Proposals with Stages/Lanes for the specific Route found between Loading Location and Unloading Location.
Transportation Proposals are organized in the following way:

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

**Freight Unit Number:**
- Identifies the Freight Unit being planned

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

**Route:**
- A route is the combination of Legs/Stages connecting Source & Destination Location
- It is the complete transportation proposal resulting from planning a Freight Unit
FUs can be consolidated for transportation purposes.

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

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

**Consolidation Pre-Requisites:**

A. Based on Dates = Not more than 7 days apart
B. At least one common leg
Several Freight Units can be selected in order to combine the Stages/Legs generated in the Transportation Proposal efficiently.

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

This format of planning transportation, has its restrictions.

**Consolidation Pre-Requisites:**

A. Based on Dates = Not more than 7 days apart
A “Statement Of Work” document (SOW) can be downloaded from each Freight Order. The SOW serves as an input for the Freight Procurement phase.

- The **SOW** includes all the Freight Orders, Inbounds, Outbounds, Purchase Orders, and Stock Transport Orders related to the same Shipment.
CCP is the Carrier Collaboration Portal. Carriers will manage the Freight Orders they are responsible for. They will be able to submit events, add notes, and upload attachments:

- **Examples of Events:**
  - **Planned:** Loading Start/End, Departure, Arrival, etc.
  - **Unexpected:** Delay, Damage, etc.

- **Examples of Attachments:** Packing List, Bill of Lading, Proof of Delivery, etc.

- **Examples of Notes:** Loading Successful

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

*Incoterm is a commercial agreement in UNOE Scenarios*
The TS.01 & TS.07 submit Expected and Unexpected Events in TM, Adding Corresponding notes and attachments related to the events submitted.

**FCA/FOB/DAT, EXW incoterms for UNOE Scenarios**

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

**FCA/EXW/DAP incoterms for INTER Mission Transfers**

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

**DAP incoterm for INTRA Mission Transfers**

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

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

**INTER Mission Transfer**

**INTRA Mission Transfer**

Shipping Plant

Receiving Plant

Region 1

Region 2

UNAMID

DAP

FCA

EXW

Receiving Plant

Shipping Plant

DAP

FCA

EXW
ADVANCED PLANNING

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

David Redondo

UCS Training Team

Tuesday, October 22, 2019
Generate combined proposal - EXAMPLES

SAME ORIGIN - SAME DESTINATION

New York Port

RSCE
Entebbe
TM – PLANNING PHASE - EXAMPLES

DISTINCT ORIGIN - SAME DESTINATION

UNICTF Valencia

RSCE Entebbe

UNLB Brindisi
TM – PLANNING PHASE – Generate combined proposal

SAME ORIGIN - DISTINCT DESTINATION

UNLB Brindisi

UNICTF Valencia

MONUSCO Goma
DISTINCT ORIGIN, DISTINCT DESTINATION – SIMILAR STAGES

MINUSMA Bamako

MINUSMA Gao

RSCE Entebbe

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

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

**Consolidation Pre-Requisites:**

A. Based on Dates = Not more than 7 days apart
Several Freight Units can be selected regardless of Unloading Location in order to combine Routes efficiently. Goods being transported from A to B or C to D can share the same Lanes/Stages and thus be transported together by combining routes in order to more efficiently manage transportation. This format of planning transportation, has its restrictions.

Consolidation Pre-Requisites:

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

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

Elena Carrasco

UCS Training Team

Tuesday, October 22, 2019
• [Shopping Cart]: Contract Catalog will be used as preferred option. If so, same PID will be offered with different Incoterms (hence, different prices).

• [Shopping Cart]: Incoterm terms from contract catalog are not picked up in the Shopping Cart line. If populated, it needs to be inserted manually. Incoterm key shall be selected by using Matchbox. Location is free text.

• [Shopping Cart]: Purchasing Group (SRM) will default the Planner Group (TM) that will have visibility on the DTR to be planned. Purchasing group and planner group are plant based.

• [Shopping Cart]: For goods, no freight line should be created. Freight Shopping Cart and Purchase Order will be created separately.

• [Shopping Cart]: PO Delivery Address/Performance Location (SRM) becomes Destination Location in the Freight Unit (TM). Umoja CM will calculate the last leg according to the destination set as PO Delivery Address/Performance Location.

• Selecting the Supplier in SRM will allow the Supplier to submit the related transportation events in the Carrier Collaboration Portal (CCP).
UNOE – PROCUREMENT PHASE – SHOPPING CART & PURCHASE ORDER

• [Purchase Order]: Buyers shall ensure the correctness of the following fields: Location, Ship- To- Address-, Purchasing Group, delivery date

• [Purchase Order]: Incoterm/ Key Location at header and item level may not be picked correctly; both incoterm key and location shall be selected by using the matchbox.

• [Purchase Order]: Selecting the Supplier in SRM will allow the Supplier to submit the related transportation events in the Carrier Collaboration Portal (CCP)

• [Purchase Order]: The Delivery Date serves as the baseline date for the new Umoja Transportation Module to estimate all the other related dates (departure date, handover date, arrival at destination date, etc.) based on the UN Transportation Network Master Data

• Certifying Officers and Procurement Officers must review the accuracy of data.
UNOE – PROCURE PHASE – INBOUND DELIVERY

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

- Once the Inbound Delivery (IBD) is created in ECC, the system automatically creates the following documents in TM: a Delivery-based Transportation Requirement (DTR) and a Freight Unit (FU).

- Both the DTR and the FU are visible in the Inbound Delivery (ECC) by using the “TM Status” tab.

- With the current system configuration, there is a “1 to 1 relationship” between IBD, DTR & FU: 1 Inbound Delivery – 1 Delivery-based Transportation Requirement – 1 Freight Unit.

- The Delivery-based Transportation Requirement (DTR) document is the representation in TM of the ECC Inbound Delivery document.

- A Freight Unit (FU) represents a set of goods that are transported together across the entire transportation chain. The following data is available in the FU document:
  - Items
  - Transportation stages
  - Document flow
  - Status information
UNOE – PLAN PHASE – GOODS VENDOR STAGE

- In a UNOE scenario, the Goods Vendor stage applies to FCA/FOB/DAT & DAP Incoterms. In this stage the Goods Vendor is responsible for delivering the items to the agreed location.

- Based on the TM Transportation Network (Master Data), the system selects the default route between the vendor location and the delivery location and creates as many Freight Orders as legs in the route.

- The system automatically assigns the Goods Vendor (e.g. Toyota) as Carrier to these newly created Freight Orders.

- These automatically created Freight Orders are in “Ready for Execution” status allowing the Goods Vendor to connect to the Carrier Collaboration Portal (CCP) to submit the events related to each FO (i.e. leg).

- Should the automatically created Freight Orders differ from the vendor’s actual route, the TM Planner can delete and re-create them to reflect the real route and to facilitate the insertion of events at a later stage.
In a UNOE scenario, the Freight Forwarder stage applies to **EXW & FCA/FOB/DAT** Incoterms. In this stage the Freight Forwarder is responsible for delivering the items to the final destination.

Freight Units appear in the **Transportation Cockpit** filtered by **Profile (EXW vs non-DAP/EXW)**:

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

Several FUs can be consolidated for transportation purposes.
**UNOE – PLAN PHASE – FREIGHT FORWARDER STAGE (EXW-FCA) - 3/4**

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

- The Carrier is defaulted to **ZDUMMY_CAR** until the freight is awarded and the real carrier is assigned.

- The system automatically calculates the estimated Charges based on the “Charges Master Data”.

---

**Display UNOE Planned Frt Order (FF Deliv) 6100010624**

<table>
<thead>
<tr>
<th>Invoicing Status:</th>
<th>01</th>
<th>Not Invoiced</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charge Calc. Status:</td>
<td>02</td>
<td>Calculated</td>
</tr>
</tbody>
</table>

- **Total Amount in Local Currency**: 9,854.70 USD
- **Total Amount in Document Currency**: 9,854.70 USD
- **Rounded Total Amount in Document Currency**: 9,854.70 USD
- **Rounded Amount Difference in Document Currency**: 0.00 USD
UNOE – PLAN PHASE – FREIGHT FORWARDER STAGE (EXW-FCA) - 4/4

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

*Specific templates are available for UNOE, COE & Troops.*
The Freight Procurement steps in the system remain very similar as they currently are.

Below some items to be considered with the TM implementation:

- Freight Services are requested in a separate Shopping Cart *(no more $1 line for freight in the goods shopping cart).*
- The SOW to be attached in the Freight Shopping Cart can be downloaded directly from Umoja TM.
- TM is now the single source of information for the transportation requirements.
Once the freight services have been awarded, the Freight Order in TM has to be updated with the selected carrier and the related purchase order number.

Once the carrier is assigned in the FO, the FO execution status changes to “Ready for Execution” allowing the freight forwarders to submit the related events.

Moreover the Freight Order needs to be updated with:

- **Actual Route**: If the route selected by the carrier is different to the planned route, the FO has to be updated with the new route as it is used to report events.

- **Actual Dates**: The planned dates need to be updated in the Freight Order based on the information provided by the Freight Forwarder.

- **Actual Charges**: The Freight Order charges have to be updated with the actual ones appearing in the Freight Purchase Order. The system allows comparing the estimated charges and the actual charges for reporting purposes.
Goods Vendors will be provided with login credentials for the Umoja Carrier Collaboration Portal (CCP).

In CCP, Goods Vendors will see the Freight Orders they are responsible for the transportation. They will be able to submit events and upload attachments:

- **Examples of Events:**
  - **Planned:** Loading Start/End, Departure, Arrival, etc.
  - **Unexpected:** Delay, Damage, etc.

- **Examples of Attachments:** Packing List, Bill of Lading, Proof of Delivery, etc.

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

In case the vendor cannot connect to CCP, Umoja role “**TS.01 TM Planner and TS.02 Manage Freight Orders**” can update the related events/attachments directly in the TM module. These Events/Attachments are also displayed in CCP.

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

Other Umoja follow on documents:
- **DAP:** Physical Goods Receipt
- **FCA:** Virtual Goods Receipt & Stock Transport Order
UNOE – EXECUTE & MONITOR PHASE – FREIGHT FORWARDER STAGE

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

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

Elena Carrasco

UCS Training Team

Tuesday, October 22, 2019
1 PURCHASING FREIGHT SERVICES

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

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.
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).

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.
3 PURCHASING GROUP

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

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

**In a Shopping Cart**

**In a Purchase Order**
4 INCOTERM KEY & LOCATION

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

**Shopping Cart:**

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

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

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

**Purchase Order:**

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

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

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

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

PO Delivery Date (SRM) defaults the FU’s start date and End date (TM) TM module
5 DELIVERY DATE

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

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

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

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

![Image of Delivery Date Table]
5 DELIVERY DATE

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

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

<table>
<thead>
<tr>
<th>Required Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weight</td>
</tr>
<tr>
<td>Volume</td>
</tr>
<tr>
<td>Pieces</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>30</td>
</tr>
<tr>
<td>20</td>
</tr>
</tbody>
</table>

Includes goods+ packaging material's information
Selecting a vendor from the SRM contract catalog in the Shopping Cart or a supplier in the Purchase Order will impact TM as follows:

✓ Vendor will be granted access to the Carrier Collaboration Portal and will be able to submit events (except in EXW)

✓ TM identifies the Shipper address (supplier address)

✓ Vendor appears as carrier in the Vendor Delivered Freight Order
INTER/INTRA MISSION TRANSFERS

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

Bryan Barrachina

UCS Training Team

Tuesday, October 22, 2019
ECC & TM DERIVATIONS

ECC

Purchasing Group
T66
Plant
UNAMI IQ20

TM

Planning & Execution Group
PT66
Plant
UNAMI IQ20

Purchasing Organization
1000

Sales Organization
1000
<table>
<thead>
<tr>
<th>PROCURE</th>
<th>PLAN</th>
<th>PROCURE FREIGHT</th>
<th>EXECUTE &amp; MONITOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>INTER – INTRA Mission Transfers</td>
<td>DAP / EXW / FCA</td>
<td>DAP / EXW / FCA</td>
<td>DAP / EXW / FCA</td>
</tr>
<tr>
<td>DAP / EXW / FCA</td>
<td>DAP / EXW / FCA</td>
<td>DAP / EXW / FCA</td>
<td>DAP / EXW / FCA</td>
</tr>
</tbody>
</table>

**PROCURE**
- LSCC: Create STR
- GSCC/LSCC: Create STO
- Logistics User: Create Out. Delivery
- Whs.Sen/Log User: PACK
- TM Integration:
  - Plant
  - Storage Location
  - Purchasing Group
  - Incoterm
  - Inc. Location
  - Del. Date
  - Purchasing Org

**PLAN**
- Umoja System: Create STR
- Umoja System: Create DTR
- Umoja System: Create Freight Unit
- TS.07 TM Plnr: Select FU(s) in TM Cockpit

**PROCURE FREIGHT**
- TS.07 TM Plnr: Generate SOW
- TS.07 TM Plnr: Document Flow
- Umoja System: T M Integration
- Umoja System: Receiving Plant: DAP / FCA
- Shipping Plant: DAP / FCA

**EXECUTE & MONITOR**
- CARRIER:
  - DAP / EXW / FCA
The Packing details as well as the selected Packaging Material/s and Handling Unit/s will have a direct impact in TM documents (DTR/FU/FO/SOW)

Packing is crucial as it will reflect Weight in Volume of Goods when Soliciting for Freight Forwarders
STR/STO – ROLES AND RESPONSIBILITIES in TM

STOCK TRANSFER WITHIN MISSION/PLANT

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

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

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

STOCK TRANSFER BETWEEN DIFFERENT MISSIONS/PLANTS

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

Between Missions Budget Relevant *(ZBUD)*

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

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

• The TM Planner chooses the type of Profile to view and Layout Settings in the Planning Profile screen
• Or selects the Profile and Layout Set defaulted according to role to view the FU by Incoterm (DAP, EXW and non-DAP/EXW)
The TS.07 combines FUs according to Origin, Destination and Delivery Dates. A 7 day date range is considered when combining of FUs. Anything beyond that will result in a non-possible combination.

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

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

For DAP, FCA and EXW scenarios, the **Receiving Plant**’s TS.07 manages the FUs and plans transportation proposals from origin to destination.
INTER MISSION – PLANNING - DAP SCENARIO

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

Plans Transportation

Issuing Plant [IP]

TS.07 TM STO Transportation Planner
Manages Transportation of Freight Units

Receiving Plant [RP]
INTER MISSION – PLANNING - *EXW SCENARIO*

**TS.07 TM STO Transportation Planner**
Manages Transportation of Freight Units
INTER MISSION – PLANNING - *FCA SCENARIO*

**ISSUING PLANT [IP]**

**RECEIVING PLANT [RP]**

**Stock Transfer (STO)**

**FCA SCENARIO**

**Plans Transportation**

**ISSUING PLANT [IP]**

**IP**

**Pre**

**IP**

**Main**

**IP**

**On**

**RECEIVING PLANT [RP]**

TS.07 TM STO Transportation Planner

Manages Transportation of Freight Units
**INTRA MISSION – PLANNING – DAP**

**DAP SCENARIO**

- **Plant Location**
- **Stock Transfer (STO)**
- **Plant**

**HAMMERSHELLS**

- **Pre**
- **Main**
- **On**

**TS.07 TM STO Transportation Planner**

Manages Transportation of Freight Units
INTER MISSION – Manage Freight Orders (DAP)

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

**DAP SCENARIO**

**Issuing Plant [IP]**  
Manages all FOs From Point of Origin To UN Location

**Receiving Plant [RP]**

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

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

**TS.08 Freight Proc**
INTER MISSION – Manage Freight Orders (EXW)

**EXW SCENARIO**

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

**Issuing Plant [IP]**
- Pre: TS.08 TM STO Freight Proc
- Edit FU/FO(s) with Routes, Dates, Charges

**Stock Transfer (STO)**

**Receiving Plant [RP]**
- Main: Manages all FOs From Point of Origin to UN Location
- On: TS.08 TM STO Freight Procurement
- Manages and Executes Freight orders

**FO**
- RP: Receiving Plant
INTER MISSION – Manage Freight Orders (FCA)

**FM SCENARIO**

**Issuing Plant (IP)**

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

**Stock Transfer (STO)**

**Receiving Plant (RP)**

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

- **FO Hand-Over**
  - IP: Pre
  - RP: Main

- **FO**
  - IP
  - RP: On

Manages FOs
- From Point of Origin to Hand-Over Location
- From Hand-Over Location to UN Location

**Edit FU/FO(s) with Routes, Dates, Charges**
INTRA MISSION – Manage Freight Orders (DAP)

**TS.08 Freight Proc**
- Edit FU/FO(s) with Routes, Dates, Charges

**DAP SCENARIO**
- Location in Plant
- Stock Transfer (STO)
- Plant

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

**Location in Plant**
- Pre
- Main
- On

**FO**
- RP

**Plant**
- RP

**Manages all FOs from Issuing Location in Plant to Receiving Location in Plant**
Carriers are provided with login credentials for the Umoja Carrier Collaboration Portal (CCP). In CCP, Carriers will see the Freight Orders they are responsible for. They will be also able and responsible for submitting events related to those Stages and upload pertinent documentation as attachments:

- **Examples of Events:**
  - **Planned:** Loading Start/End, Departure, Arrival, etc.
  - **Unexpected:** Delay, Damage, etc.

- **Examples of Attachments:** Packing List, Bill of Lading, Proof of Delivery, etc.

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

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

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

In case of INTRA mission scenarios (only DAP incoterm), “**TS.07 TM Planner**” will update the related events/attachments directly in the TM module too.
INTER MISSION – Manage Events (DAP)

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

DAP SCENARIO

Issuing Plant [IP] Pre Receives

FO

TS.07 TM STO Transportation Planner Manages Events in TM

Receiving Plant [RP]

Inter Mission Transfers Shipping Plant

FO

IP

IP

Pre

Main

On

INTER MISSION – Manage Events (DAP)
INTER MISSION – Manage Events (EXW)

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

EXW SCENARIO

TS.07 TM Planner
Manages Events in TM

FO
RP
Pre
Main
On

Submits Expected and Unexpected Events in TM

Issuing Plant [IP]

Receiving Plant [RP]
INTER MISSION – Manage Events (FCA)

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

FO IP  Pre  Hand-Over  Main  FO RP  On

Submits Expected and Unexpected Events in TM for Accountable FOs

TS.07 TM STO Transportation Planner Manages Events in TM

TS.07 TM STO Transportation Planner Manages Events in TM
INTRA MISSION – Manage Events (DAP)

**INTRA Mission Transfers Receiving Plant DAP**

**TS.07 TM Plnr Update Events**

**Location in Plant**

Stock Transfer (STO)

**Plant**

**DAP SCENARIO**

**Location in Plant**

**FO RP Pre**

**FO RP Main**

**FO RP On**

**Plant**

Submits Expected and Unexpected Events in TM

TS.07 TM STO Transportation Planner Manages Events in TM

OFFICE OF SUPPLY CHAIN MANAGEMENT
UCS TRAINING TEAM
TM MASTER DATA

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

Cyrille Momo

UCS Training Team

Tuesday, October 22, 2019
The UN has a contract with Caterpillar (BP#: 1110002314) to provide machinery for use by PK and SP missions.

- Items are purchased from the factory in Peoria, IL, US
- Items are shipped by truck, sea and truck to their final destination
- Incoterms EXW, FCA and DAP can apply to individual purchases
All submissions are sent to umoja-mdm@un.org

For single item, submit the InfoPath form

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

---

**Example - SAMPLE DATA**

<table>
<thead>
<tr>
<th>Commercial BP</th>
<th>Action</th>
<th>External Contact</th>
<th>Org ID (Procurement)</th>
<th>Org Description (Procurement)</th>
<th>Title</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Last Name</th>
<th>Date of Birth (DD/MM/YYYY)</th>
<th>Email</th>
<th>Telephone (including country code)</th>
<th>Valid From Date (DD/MM/YYYY)</th>
<th>Valid To Date (DD/MM/YYYY)</th>
</tr>
</thead>
<tbody>
<tr>
<td>11100000000</td>
<td>Create</td>
<td>External</td>
<td>XXXXX</td>
<td>DOS</td>
<td>Mr.</td>
<td>John</td>
<td></td>
<td></td>
<td>01/01/1980</td>
<td><a href="mailto:trebec@un.org">trebec@un.org</a></td>
<td>1-917-222-2222</td>
<td>22/05/2019</td>
<td>31/12/2020</td>
</tr>
<tr>
<td>11100000000</td>
<td>Create</td>
<td>External</td>
<td>XXXXX</td>
<td>DOS</td>
<td>Mr.</td>
<td>Harold</td>
<td></td>
<td></td>
<td>01/01/1987</td>
<td><a href="mailto:smith@un.org">smith@un.org</a></td>
<td>1-917-333-4444</td>
<td>25/05/2019</td>
<td>30/06/2025</td>
</tr>
<tr>
<td>11100000000</td>
<td>Create</td>
<td>External</td>
<td>XXXXX</td>
<td>DOS</td>
<td>Ms.</td>
<td>Elaine</td>
<td></td>
<td></td>
<td>15/11/1990</td>
<td><a href="mailto:gaston@un.org">gaston@un.org</a></td>
<td>831-456-789-3456</td>
<td>30/05/2019</td>
<td>01/01/2026</td>
</tr>
</tbody>
</table>

**ENTER DATA BELOW**

- Create External
- Create External
- Create External
- Create External
- Create External
- Create External
Transportation Lanes

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

**Means of transport:** UNOE_TRK, UNOE SEA, UNOE_AIR

Unit is in Km

<table>
<thead>
<tr>
<th>Leg Type</th>
<th>Start Location / Zone</th>
<th>End Location / Zone</th>
<th>Means of Transport</th>
<th>Transportation Costs</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAIN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ON</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Values go from 1 to 999
<table>
<thead>
<tr>
<th>Commercial BP</th>
<th>Action</th>
<th>External Contact</th>
<th>Org ID (Procurement)</th>
<th>Org Description (Procurement)</th>
<th>Title (Mr./Ms.)</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Last Name</th>
<th>Date of Birth (DD/MM/YYYY)</th>
<th>Email</th>
<th>Telephone (including country code)</th>
<th>Valid From Date (DD/MM/YYYY)</th>
<th>Valid To Date (DD/MM/YYYY)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1110000000</td>
<td>Create</td>
<td>External</td>
<td>XXXXX</td>
<td>DOS</td>
<td>Mr.</td>
<td>John</td>
<td></td>
<td>Trebek</td>
<td>01/01/1980</td>
<td><a href="mailto:trebek@un.org">trebek@un.org</a></td>
<td>1-917-222-2222</td>
<td>22/05/2019</td>
<td>31/12/2020</td>
</tr>
<tr>
<td>1110000000</td>
<td>Create</td>
<td>External</td>
<td>XXXXX</td>
<td>DOS</td>
<td>Mr.</td>
<td>Harold</td>
<td></td>
<td>Smith</td>
<td>01/01/1987</td>
<td><a href="mailto:smith@un.org">smith@un.org</a></td>
<td>1-917-383-4444</td>
<td>25/05/2019</td>
<td>30/06/2025</td>
</tr>
<tr>
<td>1110000000</td>
<td>Create</td>
<td>External</td>
<td>XXXXX</td>
<td>DOS</td>
<td>Ms.</td>
<td>Elaine</td>
<td></td>
<td>Gaston</td>
<td>15/11/1990</td>
<td><a href="mailto:gaston@un.org">gaston@un.org</a></td>
<td>031-456-789-3456</td>
<td>30/05/2019</td>
<td>01/01/2026</td>
</tr>
</tbody>
</table>

**Example - SAMPLE DATA**

**ENTER DATA BELOW**

<table>
<thead>
<tr>
<th>Create</th>
<th>External</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td>External</td>
</tr>
<tr>
<td>Create</td>
<td>External</td>
</tr>
<tr>
<td>Create</td>
<td>External</td>
</tr>
<tr>
<td>Create</td>
<td>External</td>
</tr>
</tbody>
</table>
Transportation Planning and Management and Track & Trace (TPTM – T&T project)

Bryan Barrachina
Valentina Barca

UCS Training Team

Tuesday, October 22, 2019
The TS.05 Collaboration Portal enterprise role is provided to enable access to on Carrier Collaboration Portal (CCP) to perform the following:

- Query the Freight Order
- Submit/Review and Display events corresponding to the Freight Order
- The CCP is web-based. As a technical pre-requisite, the TS.05 Collaboration Portal user requires internet access to be able to login and use the CCP.
The Carrier Collaboration Portal (CCP) allows Carriers (Vendors/Freight Forwarders) to update information about the Freight Orders they are responsible for the Transportation.

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

They will be able to submit Expected and Unexpected Events, add Notes and upload Attachments:

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

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

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

Once the first event is submitted, the FO execution status changes to “In Execution”. No changes in the route are further allowed.
Navigating the Carrier Collaboration Portal

- The Home page of the Carrier Collaboration Portal (CCP) shows the number of FOs ready for Execution.
- In this case there are 10 FOs we can report Events for. These FOs are in ‘Open’ status.

- Clicking on the Box with open FO or select the tab ‘Freight Order Management’ allows the user to navigate through the list of the FOs.
➢ FOs can be sorted as Open, Closed, Cancelled and Blocked.
➢ For each FO, The Freight Order Management tag displays all the information linked to it, including the Goods PO numbers, Freight PO numbers and MOU Reference Numbers.
Adding Note to a selected FO

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

- In order to attach a document in CCP, the user will click on ‘Browse’, at the bottom of the page, select the document an upload.
- The document will be visible in the ‘Attachment tag’ for the selected FO in TM.
Once we select the FO, the system opens a window with information displaying event details for Expected Events at each location.
How to Submit an Expected Event in CCP

➢ To report on an **Expected Event** the user can simply add ‘Date’ and ‘Time’ for the Event to report. (i.e. Loading End)

➢ In this case a green checkmark will appear under the Status Column.
How to Submit an Unexpected Event in CCP

➢ An **Unexpected Event** at Departure or Arrival Location can be reported by clicking on ‘Add Event’. The following process can also be followed to report an Expected Event.

➢ Once the user clicks on ‘Add Event’, a drop-down menu of possible Events opens for the Departure and Arrival locations of the FO.
How to Submit an Unexpected Event in CCP

➢ Once Event is selected and ‘Date’ and ‘Time’ stated, the user will click on ‘Confirm’

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

Note: The Tour of Events section in CCP allows Carriers to submit Unexpected events that occurred during travel from one location to another.
Email notifications are sent automatically when some specific events are reported or overdue:

**Planned Events:**

- **“Handover document” event:**
  - When the event is reported, an email is sent to the R&I contact in the destination Plant.
  - If the event is overdue more than **48 hours (from the planned date)** an email is sent to MovCon.

- **“Documentation Sent” event (only for “main carriage” leg):**
  - When the event is reported, an email is sent to the R&I contact in the destination Plant.
  - If the event is overdue more than **10 days (from the planned date)** an email is sent to MovCon.

- **“Documentation Complete” & “Custom Clearance” events (only for “main carriage” leg):**
  - If the event is overdue more than **10 days (from the planned date)** an email is sent to MovCon.

**Unexpected Events:**

- An email notification to the TM Planner, Requisitioner and R&I is sent when any of this type of events is reported (*delay, damage, loss, etc.*).

- Procurement Division will also be notified in case the unexpected event is either “Cost Change” or “Route Change”
THANK YOU!

Questions?