Day 1 - Table of Contents:

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- □ End to End Process
- □ TM related concepts
- □ TM Enterprise Roles

**Upload File Navigation & Updates**

- □ Upload files COE & TROOPS
- □ Master Data Request process
- □ FWO, FU, FO Documents
- □ FWO, FU, FO Document Search, Navigation & Set Up
COE / TROOPS Overview

Upload Files

- TROOPS & COE
  Load List (Air, Sea, Land)

Generate TM Documents

Forwarding Order

Generate Transportation Proposals

SOW (Statement of Work)
- Transportation Proposal

Freight Orders
- Estimated Cost

Manage Transportation

Track & Trace

- SOLICITATION
  - Actual Transportation route
  - Actual Charges
  - Actual Dates

Freight Unit

- TROOPS
- Equipment

Main Carriage

- Stage 2

Stage 1
Pre-Carriage

Stage 3
On Carriage

Manage Events

Monitoring & Communication
- Real Time
- Centralized
- Transparent

Generate TM Documents

- .xlsx
- .txt

Prepare Freight Orders

- Estimated Cost

Track & Trace

- SOLICITATION

GENERATE TRANSPORTATION PROPOSALS

- SOW
  - Transportation Proposal

- Freight Orders
  - Estimated Cost

- TROOPS
- Equipment

- Forwarding Order

- Generate TM Documents
- Upload Files

- SOLICITATION
  - Actual Transportation route
  - Actual Charges
  - Actual Dates

- Monitor & Communicate
  - Real Time
  - Centralized
  - Transparent

- Main Carriage
  - Stage 2

- Stage 1
  Pre-Carriage

- Stage 3
  On Carriage

- Manage Events

- SOLICITATION

Optimization:
Better route selection for movements & resource utilization, improving transportation management effectiveness and efficiency
Consolidation of volume across missions adopting more flexible bundled delivery methods
More regular deliveries, maximizing use of existing resources increasing agility and flexibility of the Supply Chain process

Cost:
Reduce operating cost by considering total landed cost in compliance with the UN Financial Rules and Regulations
SOW generation used for freight solicitation with estimated costs, routes and goods transported

Visibility:
View different routes and modes of transport with Track and Trace ability for shipments

Data Analytics:
Availability of more data analytics by capturing all movements in one single system
More historical data collected for rates
<table>
<thead>
<tr>
<th>CONCEPT</th>
<th>DESCRIPTION</th>
<th>CONCEPT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>TM</td>
<td>Transportation Management</td>
<td>CCP</td>
<td>Carrier Collaboration Portal</td>
</tr>
<tr>
<td>FWO</td>
<td>Forwarding Order</td>
<td>FU</td>
<td>Freight Unit</td>
</tr>
<tr>
<td>PLANNING &amp; EXECUTION GROUP</td>
<td>Refers to the Planning and Execution Group in TM in charge or Planning Transportation and Executing and Monitoring Events</td>
<td>SOW/SOR</td>
<td>Statement of Work / Statement of Requirement</td>
</tr>
<tr>
<td>FO</td>
<td>Freight Order</td>
<td>PLANNING PROFILE</td>
<td>Allows TM Planners to access a range FUs for planning</td>
</tr>
<tr>
<td>TRANSPORTATION COCKPIT</td>
<td>Allows TM Planners to select and manage transportation for a range FUs</td>
<td>EXPECTED EVENTS</td>
<td>List of Expected events to be monitored and submitted through CCP and TM</td>
</tr>
<tr>
<td>UNEXPECTED EVENTS</td>
<td>Events submitted manually through CCP and TM which are not part of the list of expected events</td>
<td>EDI</td>
<td>Electronic Data Interchange: Instant Communication between Umoja and Freight Forwarder systems</td>
</tr>
<tr>
<td>CONCEPT</td>
<td>DESCRIPTION</td>
<td>CONCEPT</td>
<td>DESCRIPTION</td>
</tr>
<tr>
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<td>------------------------------------------------------------------------------</td>
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<td>-------------------------------------------------</td>
</tr>
<tr>
<td>LOA (DAP)</td>
<td><strong>Letter of Assist:</strong> Legally binding contractual documents between the UN and a Government (Transportation is Provided under Letter of Assist)</td>
<td>Non-LOA (EXW)</td>
<td>Transportation is not provided under Letter of Assist</td>
</tr>
<tr>
<td>EM</td>
<td>Event Management</td>
<td>FPO</td>
<td>Freight Purchase Order</td>
</tr>
<tr>
<td>COE/TROOPS</td>
<td>COE/TROOPS</td>
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<td></td>
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<tr>
<td>------------</td>
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<tr>
<td><strong>Transactional Roles in TM</strong></td>
<td><strong>TM related roles</strong></td>
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<tr>
<td><strong>TS.01</strong> TM TRANSPORTATION PLANNER</td>
<td><strong>TS.04</strong> TM MASTER DATA MAINTAINER</td>
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<tr>
<td><strong>TS.02</strong> TM MANAGE FREIGHT ORDER</td>
<td><strong>TS.05</strong> COLLABORATION PORTAL</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
TS.01 TM TRANSPORTATION PLANNER

The Transportation Planner enterprise role enables the user to plan, organize and optimize the movement of freight and personnel to be undertaken by freight forwarders, third party logistics providers, short-term and long-term flight charter or other resources contracted by the UN. The Transportation Planner for COE is responsible for planning the movement of contingent-owned equipment (COE) between the TCC location and the mission location. Transportation Planner for TROOPS is responsible for planning the deployment, repatriation or rotation of TCC/PCCs between the TCC and the mission.

In Umoja, the Transportation Planner provides access to the below functions:

- **Display / Query Delivery-based Transportation Requirement-DTR (UNOE):** This will enable the User to display the Transportation requirements coming from ECC Inbound deliveries.

- **Create / Change / Display / Query Forwarding Order-FWO (COE/Troops):** This will enable the User to manage the forwarding orders in TM which act as transportation requirements for COE and Troops Processes.

- **Create / Change / Display / Query Freight Unit (-FU):** This will enable the User to create / change / display or query the freight units which act as the core-input for the planning in the transportation Cockpit.

- **Plan / Change / Display / Query Freight Orders (-FO):** This will enable the user to execute the transportation plan in the cockpit on the freight units selected, select or accept the planning output to create the freight orders by means/mode of transport. Allows the user to estimate the charges, print preview the statement of work (SOW) along with ability to download it.

- **Submit events against the Freight Order:** Allows the user to submit expected and unexpected events against the freight order in TM system.
TS.02 TM MANAGE FREIGHT ORDER

The TM Manage Freight Order (TS.02) enterprise role in Transportation Management (TM) enables the user to display, amend, update and enter events in a Freight Order for a movement of freight and personnel being undertaken by freight forwarders, third party logistics providers, short-term and long-term flight charter or other resources contracted by the UN.

There are 3 variations to the TM Manage Freight Order role segregated to movements of UNOE, COE & TROOPS.

In Umoja, the TM Manage Freight Order (TS.02) role provides access to the below functions:

- **Display / Query DTR (UNOE):** This will enable the User to display the Transportation requirements coming from ECC Inbound deliveries.
- **Display / Query Forwarding Order (COE/Troops):** This will enable the User to display the forwarding orders in TM which act as transportation requirements for COE and Troops Processes.
- **Change / Display / Query Freight Orders:** This will enable the user to update the freight order stages, dates, actual charges, carrier and Freight PO.
- **Change / Display / Query Freight Units:** This will enable the user to update the freight unit routes and dates.
- **Submit events against the freight order:** Allows the user to submit expected and unexpected events against the freight order in TM system.
TRANSPORTATION MANAGEMENT ENTERPRISE ROLES

TS.04 TM MASTER DATA MAINTAINER
TM Master Data Maintainer enterprise role in TM and ECC provides access to the below Functions:
Create, Change and Display Vendor in ECC.
Enable the user to manage Core Interface (CIF) Master Data (Business Partners, Vendors, materials, plants, shipping points etc) from ECC to TM.
Enable the user to Maintain TM Master Data (i.e Locations, Transshipment Points, Handover Locations, Lanes, Zone, Network, Org. Structure, Default Routes, Rates, Rate Tables).

TS.05 COLLABORATION PORTAL
The TS.05 Collaboration Portal enterprise role is provided to enable access to on Carrier Collaboration Portal (CCP) to perform the following:
Query the Freight Order
Submit/ Review and Display events corresponding to the Freight Order
The CCP is web-based. As a technical pre-requisite, the TS.05 Collaboration Portal user requires internet access to be able to login and use the CCP.
## Upload Files: COE & TROOPS

### TROOPS & COE Load List (Air, Sea, Land)

<table>
<thead>
<tr>
<th>Source Loc</th>
<th>Source Loc</th>
<th>Dest Loc</th>
<th>Dest Loc Description</th>
<th>Pick-Up (from)</th>
<th>Delivery (To)</th>
<th>Cargo Load List Items</th>
<th>Product</th>
<th>Item Type</th>
<th>Weight</th>
<th>Weight Uom</th>
<th>Volume</th>
<th>Volume Uom</th>
<th>Quantity</th>
<th>Base BTD Ref</th>
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<tbody>
<tr>
<td>Beirut</td>
<td>BEIRUT_AIRPORT</td>
<td>Kathmandu</td>
<td>KATHMANDU_01/05/2020</td>
<td>14/05/2020</td>
<td>Cargo Load List</td>
<td>LoadList</td>
<td>ZLC</td>
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<td>14/05/2020</td>
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<td>M3</td>
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<td>14/05/2020</td>
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<td>KG</td>
<td>0</td>
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<td>14/05/2020</td>
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<tr>
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<td>14/05/2020</td>
<td>Total Vehicles</td>
<td>VEHICLE</td>
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<td>KG</td>
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<td>M3</td>
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<tr>
<td>Beirut</td>
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<td>14/05/2020</td>
<td>VSO</td>
<td>DEPOTSNAP</td>
<td>ZFRS</td>
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</tbody>
</table>

![Image of file upload interface](image_url)

*For further details, please refer to the attached files.*
To Request TM Master data, access the following link: **TM Master Data**

<table>
<thead>
<tr>
<th>Module</th>
<th>Template Details</th>
<th>Format(s)</th>
<th>Submission Method</th>
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</thead>
<tbody>
<tr>
<td>Transportation Management</td>
<td><a href="#">TM MDM Template - Contact Person</a> (Infopath)</td>
<td>InfoPath</td>
<td>Submit both forms to <a href="mailto:umoja-mdm@un.org">umoja-mdm@un.org</a></td>
</tr>
<tr>
<td>Contact Person</td>
<td><a href="#">TM MDM Template - Contact Person</a> (Excel)</td>
<td>MS Excel</td>
<td></td>
</tr>
<tr>
<td>CIF Template</td>
<td><a href="#">TM MDM Template - CIF</a></td>
<td>MS Excel</td>
<td>Submit via iNeed Self Service. In iNeed Self Service, choose &quot;Umoja Catalogue&quot;. Choose &quot;Master Data Maintenance&quot; in the filter. Then, choose &quot;CIF Template&quot;.</td>
</tr>
<tr>
<td>Assign Transshipment Points</td>
<td><a href="#">TM MDM Template - Assign Transshipment Points</a> (InfoPath)</td>
<td>InfoPath</td>
<td>If requesting one item, submit the InfoPath form to <a href="mailto:umoja-mdm@un.org">umoja-mdm@un.org</a></td>
</tr>
<tr>
<td></td>
<td><a href="#">TM MDM Template - Assign Transshipment Points</a> (Excel)</td>
<td>MS Excel</td>
<td>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></td>
</tr>
<tr>
<td>COE Pickup Location</td>
<td><a href="#">TM MDM Template - COE Pickup Location</a> (InfoPath)</td>
<td>InfoPath</td>
<td>If requesting one item, submit the InfoPath form to <a href="mailto:umoja-mdm@un.org">umoja-mdm@un.org</a></td>
</tr>
<tr>
<td></td>
<td><a href="#">TM MDM Template - COE Pickup Location</a> (Excel)</td>
<td>MS Excel</td>
<td>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></td>
</tr>
<tr>
<td>Default Routes</td>
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<td>InfoPath</td>
<td>If requesting one item, submit the InfoPath form to <a href="mailto:umoja-mdm@un.org">umoja-mdm@un.org</a></td>
</tr>
<tr>
<td></td>
<td><a href="#">TM MDM Template - Default Routes</a> (Excel)</td>
<td>MS Excel</td>
<td>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></td>
</tr>
</tbody>
</table>
EXCEL LOAD LIST: COE Copy and Paste

The data added under the **Source Loc Desc** and **Dest Loc Description** populated from the Summary Tab may not automatically populate the **Source Loc** and **Dest Loc** columns with the desired Locations. This occurs mostly because the formulas in the Load Lists will select the first of the locations under the Reference Loc tab.

The **TS.01** can then copy and paste the desired location into the **Source** and **Destination Loc** columns but **should not save the changes in the template Load List** as this will affect the default settings of the Load List.
The Movement Type field in the Summary Tab is used to define if the Contingency Movements refer to Deployment “DEPLOY”, Rotation “ROTO” and Repatriation “REPAT”.

Changing the Movement Type will update the MOU (Reference Number).
Using the COE SEA Several Locations Load List template, TS.01 can add different locations in a country as delivery or pick up locations. Like this, they will be able to consolidate movements in TM when generating proposals.

Vs

Using the COE SEA Several Locations Load List template, TS.01 can add different countries as delivery or pick up locations. However, they will not be able to consolidate movements in TM when generating proposals.
The COE Load List template now includes a **Square Meter** field. This unit of area field is directly connected to the formulas in the summary tab. The data added under M2 is also reflected in the Statement of Work (SOW) form in the Transportation Management system.
The **Movement** field in the Summary Tab for the TROOPS Load Lists is used to define if the Troops Movements refer to Deployment “DEPLOY”, Rotation “ROTO” and Repatriation “REPAT”.

Changing the **Movement** will update the MOU (Reference Number).
The FWO, FU and FO document’s main sections as well as subsections are displayed by default in a certain fashion. The tabs displayed, the order in which they are displayed, and format can be changed by the TM user.

Open Personalization Dialogue Box

The FWO, FU and FO document default settings can be personalized by clicking on the Open Settings Dialogue icon. The changes performed can be set as default.
To Search for Forwarding Orders the TS.01 selects:
- Forwarding Order Management tab
- Clicks Overview Forwarding Orders

To Search for Freight Orders the TS.02 selects:
- Freight Order Management tab
- Clicks on Overview Freight Orders

The TS.01 and TS.02 can personalize the default settings by clicking on the Open Settings Dialogue icon. The changes performed can be set as default.
Job Aids – Transportation Management:

Transportation Management

✓ Combine Freight – Generate a Combined Proposal
✓ Using TM Map Analysis
✓ Performing Packing on Inbound Delivery
✓ Requesting TM Master Data
✓ Electronic Data Interchange (EDI)

Transportation Management Reporting

✓ BI: Delivery Requirements and Forwarding Orders
✓ BI: End to End – Freight Orders Items and Charges
✓ BI: Freight Orders Events
✓ BI: Event Details
THANK YOU!

Questions?