Planning Transportation

✓ Navigation, Set Up and Search Review
✓ Generate Proposals (Single)
✓ Generate Proposals (Multiple)

Planning Transportation

✓ Accept Planning Vs Accept Route
✓ Generate proposals with dates in the past
✓ Cancel Documents (Freight Units and Freight Orders)
✓ SOW Documents (Estimated Charges)
Transportation Cockpit – Search and Set Up

SEARCH function in the Transportation Cockpit:

The Transportation Cockpit allows the TS.01 to search for Freight Units and other related documents by using the magnifying glass or clicking on any of the columns displayed.

PERSONALIZATION function in the Transportation Cockpit:

The Personalize button in the Transportation Cockpit allows the TS.01 to customize which documents are displayed in the cockpit and how they are displayed. The TS.01 can save the changes and set view as default.
When the UN MAP Layout is added to the Planning Profile, the transportation cockpit displays on the bottom right corner of the screen a world map that will aid the TS.01 to view the proposed route before accepting it. Select the Tab Map to view the entire route or Map Display to view stage by stage.
When the Freight Units are selected, the Map view displays the entire transportation proposal generated by the TM Planner.
When the Freight Orders/Stages are selected, the Map Display view displays the transportation route generated by the TM Planner leg by leg.
The **Transportation Cockpit** allows the TS.01 to manage transportation for freight units and generate transportation proposals.

The **Transportation Cockpit** can be set up and personalized to ease navigation and search.
The **Transportation Cockpit** allows the TS.01 to select Freight Units in order to generate transportation proposals. For COE and TROOPS scenarios the transportation proposals are MOU based. Therefore there is no consolidation of Freight Units unless transportation proposals are generated based on same MOU, same origin, same destination, and fall within the 7-day range.

Once the Freight Unit is selected the TS.01 generates the Transportation Proposals. Planning can be performed 180 days in advance.
When generating proposals, the TS.01 can encounter an “Optimizer run fail” error. This error could indicate that there are master data elements in TM that are missing: Lanes, Locations, Shipping Points, etc...

The TS.01 should then inquire on the error and request Master Data is needed.

To Request TM Master data, access the following link: TM Master Data
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

**Freight Order/s:**
FOs are the Documents in TM that numerically identify each Leg/Stage planned after accepting a Route or a Transportation Proposal in the TM Cockpit
Transportation Cockpit – GENERATE SINGLE PROPOSAL

Proposals can be sorted by Duration, Cost, Distance and Freight Order Costs according to the TM Planner’s preference.

<table>
<thead>
<tr>
<th>Duration</th>
<th>Costs</th>
<th>Freight Order Costs</th>
<th>Distance</th>
<th>Distance Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>920:01</td>
<td>7588527.20</td>
<td>7588492.66</td>
<td></td>
<td>KM</td>
</tr>
<tr>
<td>920:01</td>
<td>34.54</td>
<td>7588492.66</td>
<td></td>
<td>KM</td>
</tr>
<tr>
<td>01</td>
<td>0.00</td>
<td>1534530.01</td>
<td>1.572</td>
<td>KM</td>
</tr>
<tr>
<td>916:25</td>
<td>0.00</td>
<td>5914077.16</td>
<td>12,108.480</td>
<td>KM</td>
</tr>
<tr>
<td>3:34</td>
<td>34.54</td>
<td>139885.50</td>
<td>286.388</td>
<td>KM</td>
</tr>
</tbody>
</table>

The personalization function allows the TS.01 to customize how the Transportation Proposals are viewed. The changes performed can be set as default.

The TS.01 selects a proposal, checks the box under the selected column and clicks on Accept Planning.

[Transportation Proposals: Standard Layout]

- Accept Route
- Cancel
- Accept Planning
- Optimizer Explanation
- Page Layout
TM returns the selected proposal divided into stages which will become Freight Orders when saved.

TS.01 can view details of the proposed stages in the Freight Orders section of the cockpit.

Once saved, the proposals become Freight Order documents in TM linked to the Freight Unit/s and Forwarding Order/s.
The Stages in the transportation proposal become Freight Orders when the TS.01 clicks on **SAVE**. The **Undo** option will erase the stages and the proposal will have to be re-generated.
Under the **Output Management** tab, each Freight Order displays the **SOR** (Statement of Requirements) which contains all details necessary for the Solicitation process.

**ANNEX-B**

RFP: *<Please Enter RFP/ITB number here>*

Forwarding Order # 2100000945

Freight Order # 6100029097, 6100029098, 6100029099

**STATEMENT OF REQUIREMENTS, STANDARD SHIPPING TERMS AND EVALUATION CRITERIA**
TM Planners can consolidate Freight Units with same MOU, 7-day date range, Same Origin and Destination to generate transportation proposals that combine transportation stages.
Once TM Planners select the best proposal and Accept Planning, the system will generate the stages required for the transportation proposal consolidating all legs that are the same.
The TM Planner can also consolidate Freight Units that have the same MOU number, but several pick up/drop off locations within the same country by using the option Accept Route Vs Accept Planning.

This will allow the TM Planner to optimize transportation by selecting the best proposal and then avoiding unnecessary stages.

To do so, the TS.01 should select the Freight Units to consolidate, and generate transportation proposals.
Once the system generates the proposals, the TS.01 should select the most suitable combination in order to merge stages at a later point in planning and click on Accept Route instead of Accept Planning.
Accept Planning
Accept Planning generated Freight Orders without considering transport optimization.

Accept Route
Accept route splits the Freight Units into stages but does not generate Freight Orders. The TM Planner selects the split Freight Units and again generates a new transportation proposal.
The new proposals now combine the stages selected in order to optimize transportation. The TM Planner selects the most suitable option again and this time selects Accept Planning.

The new proposal generated from Accept Route contains less stages than the one generated from Accept Planning.
Transportation Cockpit – Change Freight Order Dates

The TM Planner can also generate proposals in the past. To do so, after the Upload File has generated a Forwarding Order, the TS.01 accesses the FWO and changes the Requested Pick Up and Delivery Date.

The Requested Pick Up and Delivery Dates can be changed to the past and saved. The newly added dates will remain.
Transportation Cockpit – Change Freight Order Dates

Once the dates are changed in the FWO, the Freight Unit dates change automatically.

To view a Freight Unit with past dates in the Transportation Cockpit, the TS.01 selects the FWO from the Overview Transportation Requirements page and clicks on “Start Transportation Cockpit”
Transportation Cockpit – Change Freight Order Dates

The TM Planner selects the Freight Unit from the Cockpit and generates a proposal. The dates of the proposal will show in the future as these can only be created in the future.

The TM Planner then accepts planning and generates proposed Freight Order stages.

Before the Planner saves the proposed Freight Orders, the dates can be changed to the past under the Freight Orders/Freight Bookings section of the transportation cockpit for each stage. Once changed, saving will now keep the dates in the past.
The TS.01, as best practice, should review the estimated cost of the Freight Orders before downloading the SOW form. If there are no estimated cost, these should be added. This will maintain in the TM system historical data of estimated cost.

### Freight Order with no estimated cost

<table>
<thead>
<tr>
<th>Charge Item</th>
<th>Charge Type</th>
<th>Charge Desc.</th>
<th>Code Type</th>
<th>Rate Amount</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dummy Carrier / New York, NY 10017</td>
<td>Estimate Charge</td>
<td>Estimate Charge</td>
<td>10 - VEHICLE</td>
<td>USD</td>
<td></td>
</tr>
<tr>
<td>Package 50</td>
<td>Estimate Charge</td>
<td>Estimate Charge</td>
<td>20 - TRAILER</td>
<td>USD</td>
<td></td>
</tr>
<tr>
<td>Package 50</td>
<td>Estimate Charge</td>
<td>Estimate Charge</td>
<td>30 - BREAKBULK</td>
<td>USD</td>
<td></td>
</tr>
<tr>
<td>Package 50</td>
<td>Estimate Charge</td>
<td>Estimate Charge</td>
<td>40 - CONTAINER20</td>
<td>USD</td>
<td></td>
</tr>
</tbody>
</table>

### Freight Order with estimated cost

<table>
<thead>
<tr>
<th>Charge Item</th>
<th>Charge Type</th>
<th>Charge Desc.</th>
<th>Code Type</th>
<th>Rate Amount</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dummy Carrier / New York, NY 10017</td>
<td>Estimate Charge</td>
<td>Estimate Charge</td>
<td>10 - VEHICLE</td>
<td>50.00 USD</td>
<td></td>
</tr>
<tr>
<td>Package 50</td>
<td>Estimate Charge</td>
<td>Estimate Charge</td>
<td>20 - TRAILER</td>
<td>100.00 USD</td>
<td></td>
</tr>
<tr>
<td>Package 50</td>
<td>Estimate Charge</td>
<td>Estimate Charge</td>
<td>30 - BREAKBULK</td>
<td>150.00 USD</td>
<td></td>
</tr>
<tr>
<td>Package 50</td>
<td>Estimate Charge</td>
<td>Estimate Charge</td>
<td>40 - CONTAINER20</td>
<td>255.00 USD</td>
<td></td>
</tr>
</tbody>
</table>
The Contingency Owned Equipment (COE) SOW form has now replaced the **Forwarding Order #** by the **Buyer's Reference #** and the address for Shipper and Consignee has been replaced by “**To be advised**”.

**ANNEX-B**

**RFP: <Please Enter RFP/ITB number here>**

Buyer's Reference # UNIFIL_NPLBAT_COE_repat_01062020

Freight Order # 6100014172, 6100014173, 6100014174

**STATEMENT OF REQUIREMENTS, STANDARD SHIPPING TERMS AND EVALUATION CRITERIA**

<table>
<thead>
<tr>
<th>CARGO SUMMARY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pick Up Location:</strong></td>
</tr>
<tr>
<td><strong>Final Destination:</strong></td>
</tr>
<tr>
<td><strong>No. of Container</strong></td>
</tr>
<tr>
<td><strong>No. of Vehicle</strong></td>
</tr>
<tr>
<td><strong>No. of Trailers</strong></td>
</tr>
<tr>
<td><strong>No. of Break Bulk</strong></td>
</tr>
<tr>
<td><strong>Total Shipping units:</strong></td>
</tr>
<tr>
<td><strong>Total area (M2):</strong></td>
</tr>
<tr>
<td><strong>Total volume(M3):</strong></td>
</tr>
<tr>
<td><strong>Total weight(KG):</strong></td>
</tr>
</tbody>
</table>

The **Square Meter Area** entered in the **COE Upload File** is also reflected in the SOW form
The SOW form can be downloaded from TM as a PDF file but must be edited in Word format.

Click on the **SAVE** icon and "Permit all Access"

Once the SOW is saved, right click over the saved document and open the file with the Word Application.
Freight Orders – Document Upload functions

Single file Upload:
The TS.01 and TS.02 can upload files to Freight Orders using the attachment option found under the Attachments tab. These files can be set for Internal view only or external if file is to be shared with carriers using CCP.

Mass file Upload:
The TS.01 and TS.02 can upload several files simultaneously to Freight Orders using the Mass Attachment option available in the Freight Order search page. These files can also be set for Internal view only or external if file is to be shared with carriers using CCP.
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
Transportation Management: Practice Scenario

**Introduction**

The objective of this exercise is to allow COE/TROOPS TM Planners to practice how to:

- Set Up Personalization Views in TM
- Set Up the Planning Profile for CO & TROOPS.

<table>
<thead>
<tr>
<th>User Name</th>
<th>User ID</th>
<th>Password</th>
</tr>
</thead>
<tbody>
<tr>
<td>TS.01 Transportation Planner</td>
<td>01PLCOEPS02 / 01PLTROOPS01</td>
<td>Umoja123</td>
</tr>
<tr>
<td>TS.01 Transportation Planner</td>
<td>02PLCOEPS02 / 02PLTROOPS01</td>
<td>Umoja123</td>
</tr>
<tr>
<td>TS.01 Transportation Planner</td>
<td>03PLCOEPS02 / 03PLTROOPS01</td>
<td>Umoja123</td>
</tr>
<tr>
<td>TS.01 Transportation Planner</td>
<td>04PLCOEPS02 / 04PLTROOPS01</td>
<td>Umoja123</td>
</tr>
<tr>
<td>TS.01 Transportation Planner</td>
<td>05PLCOEPS02 / 05PLTROOPS01</td>
<td>Umoja123</td>
</tr>
</tbody>
</table>

*Please keep in mind that those of you practicing the scenarios should understand that the limited amount of Usernames provided for the training environment could cause more than one person to edit page settings at the same time. To avoid this, the best option would be to have at least 3 staff members sharing one username and practice together.*
Transportation Management: Practice Scenario

Access Umoja and enter your EIDMS credentials: http://login.umoja.un.org/

Click on SAP GUI
Access the Umoja Training Environment:

Add the credentials provided in Slide 14 for COE and TROOPS under User and then add the password.
Launch the Net Weaver Business Client:

**Launch NetWeaver Business Client**

Cockpit `nwbc`

- `ZTFD: TM: PLNR_EXE_COE_PS02`
- `ZTGS: IN_TE_USR_GEN`
- `Z RFCACL_ROLE`

**TM: Transportation Planner & Execution for COE Planning & Execution Group PS02, TM: Transport Management General User, ROLE FOR RFC AUTHORIZATION**

**TM: Transportation Planner & Execution for COE Planning & Execution Group PS02**

**TM: Transport Management General User**

**ROLE FOR RFC AUTHORIZATION**

Other `nwbc`

To test a role not assigned to your user, enter the role and choose one of the icons to start NWBC for Desktop or NWBC for HTML.

Click on “Launch NWBC” to access TM
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.
FWO, FU and FO – Search and Set Up

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

Open Settings Dialogue

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.
Transportation Cockpit – Search and Set Up

SEARCH function in the Transportation Cockpit:

The Transportation Cockpit allows the TS.01 to search for Freight Units and other related documents by using the magnifying glass or clicking on any of the columns displayed.

PERSONALIZATION function in the Transportation Cockpit:

The Personalize button in the Transportation Cockpit allows the TS.01 to customize which documents are displayed in the cockpit and how they are displayed. The TS.01 can save the changes and set view as default.
Planning Profiles: COE and TROOPS

Planning Profile for COE: Log in Using the COE username

Transportation Cockpit: Profile and Layout Sets

Profile and Layout Sets (4)

<table>
<thead>
<tr>
<th>Description</th>
<th>Freight Unit Selection Profile</th>
<th>Freight Order Selection Profile</th>
<th>Planning Profile</th>
<th>Transportation Cockpit Layout</th>
</tr>
</thead>
<tbody>
<tr>
<td>COE LOADAP</td>
<td>ZSEL_FU_COE_MEM_CTRY_DLVD_LOA</td>
<td>ZSEL_FO_COE_LOA</td>
<td>ZPLN_COE_MEMBER_COUNTRY_DEL</td>
<td>UN Map Layout</td>
</tr>
<tr>
<td>COE non LOADAP</td>
<td>ZSEL_FU_COE_NON-LOA</td>
<td>ZSEL_FO_COE_NONLOA</td>
<td>ZPLN_COE</td>
<td>UN Map Layout</td>
</tr>
<tr>
<td>COE SEA LOADAP</td>
<td>ZSEL_FU_COE_MEM_CTRY_DLVD_LOA</td>
<td>ZSEL_FO_COE_LOA</td>
<td>ZPLN_COE_NON-AIR</td>
<td>UN Map Layout</td>
</tr>
<tr>
<td>COE SEA Non LOADAP</td>
<td>ZSEL_FU_COE_NON-LOA</td>
<td>ZSEL_FO_COE_NONLOA</td>
<td>ZPLN_COE_NON-AIR</td>
<td>UN Map Layout</td>
</tr>
</tbody>
</table>

Planning Profile for TROOPS: Log in using the TROOPS username

Transportation Cockpit: Profile and Layout Sets

Profile and Layout Sets (4)

<table>
<thead>
<tr>
<th>Description</th>
<th>Freight Unit Selection Profile</th>
<th>Freight Order Selection Profile</th>
<th>Planning Profile</th>
<th>Transportation Cockpit Layout</th>
</tr>
</thead>
<tbody>
<tr>
<td>TROOPS LOA</td>
<td>ZSEL_FU_COE_TROOPS_MEM_CTRY_DLVD_LOA</td>
<td>ZSEL_FO_COE_TROOPS_LOA</td>
<td>ZPLN_COE_TROOPS_MEMBER_COUNTRY_DEL</td>
<td>UN Map Layout</td>
</tr>
<tr>
<td>TROOPS LOA SEA &amp; LAND</td>
<td>ZSEL_FU_COE_TROOPS_MEM_CTRY_DLVD_LOA</td>
<td>ZSEL_FO_COE_TROOPS_LOA</td>
<td>ZPLN_TROOPS_MEMBER_COUNTRY_DEL</td>
<td>UN Map Layout</td>
</tr>
<tr>
<td>TROOPS Non LOA</td>
<td>ZSEL_FU_COE_TROOPS_NONLOA</td>
<td>ZSEL_FO_COE_TROOPS_NONLOA</td>
<td>ZPLN_COE_TROOPS</td>
<td>UN Map Layout</td>
</tr>
<tr>
<td>TROOPS Non LOA SEA &amp; LAND</td>
<td>ZSEL_FU_COE_TROOPS_NONLOA</td>
<td>ZSEL_FO_COE_TROOPS_NONLOA</td>
<td>ZPLN_TROOPS_NON-AIR</td>
<td>UN Map Layout</td>
</tr>
</tbody>
</table>
THANK YOU!

Questions?