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Overview

This job aid documents how to execute the Business Intelligence (BI) report called “**Event Details**”. It is intended to facilitate the exploration of statistics related to the Execution Events.

The aim of the report is to support the business with the assessment of the performance of the Shipments. Providing differences between Planned and Actual dates, Reported and Submission dates and their Averages from a wide variety of perspectives. Unlike the measures get from Freight Order-Events Analysis Workspace, these pivot in Event rather than Freight Order, hence the need of a separate Workspace described in this document.

Business users can run Analysis Workspace reports and use them as a starting point to instantaneously create complex, ad-hoc queries by using features like “slice and dice”, “drill-down”, breakdown and “filtering”. In other words, the Analysis Workspace is a blank slate which provides users with the customised analysis and reports they need to build.

Users can run reports, export and save them in Excel, PDF or CSV format and even print them. When users run the report, the system generates it from the latest available data set loaded into SAP HANA from the Umoja transactional system. Data is refreshed in BI in real time mode from the Transportation Management transactional system.

Objectives

This Job Aid will provide the step-by-step procedure on how to generate a report on Freight Order Events using the Umoja BI Analysis Workspace application.

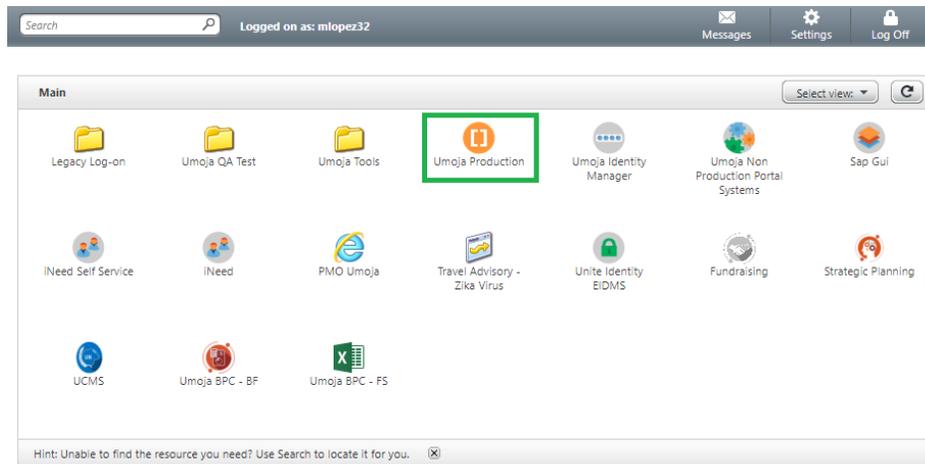
Enterprise Roles

BI.85 ROLE: ALL:BI:SC_TM_MEM_ANALYTIC_USER provides access to the TM Analysis Workspaces reports.

Procedure

A. Navigation

1. Log on to Citrix: <https://login.umoja.un.org>
2. Go to the icon called "Umoja Production".

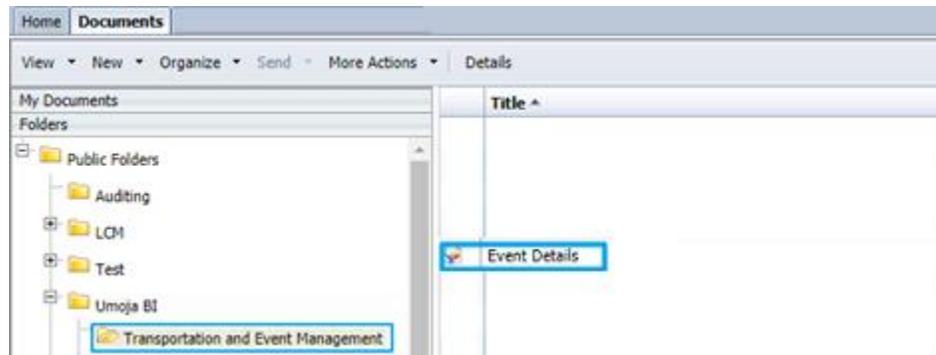


3. Open the downloaded file (normally called "launch.ica").
4. Click on "BI Portal".



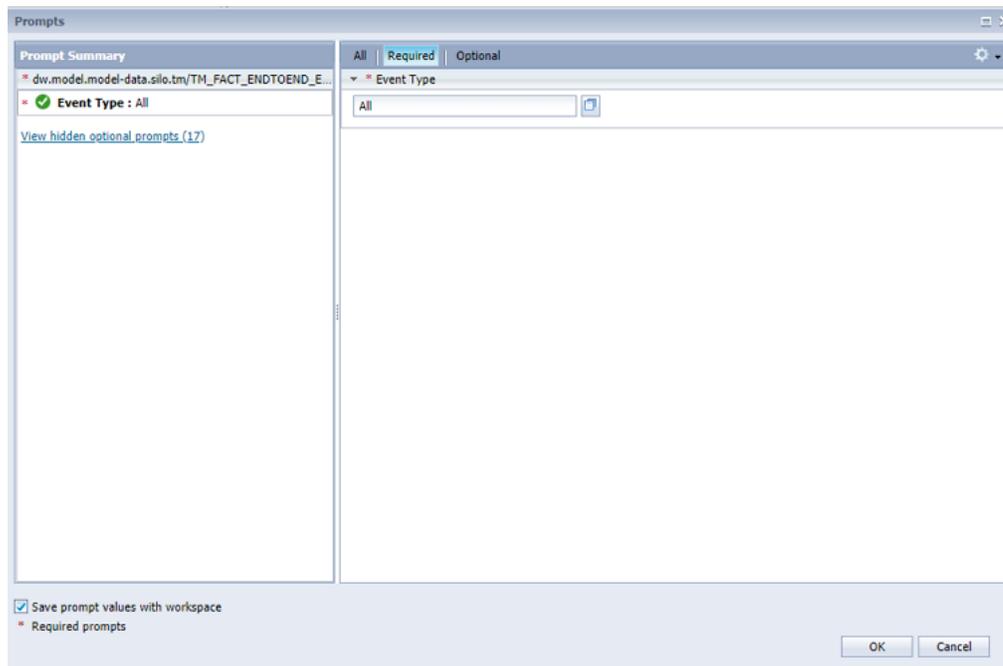


5. Open the public folder **Umoja BI** → **Transportation and Event Management**. Double-click on the name to open it.



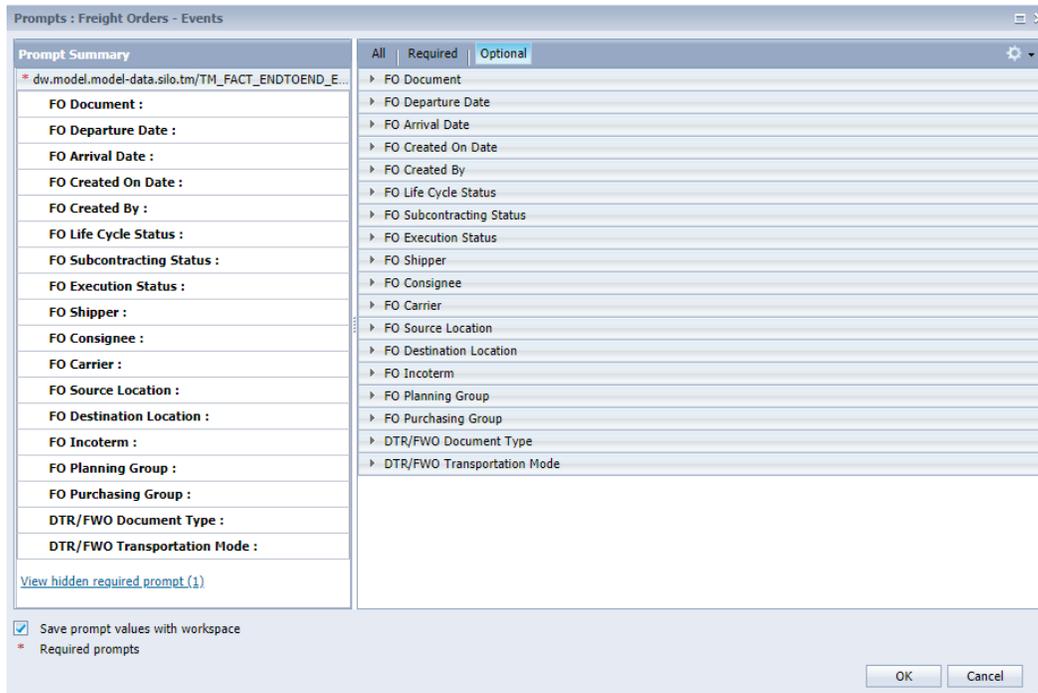
B. Prompts

1. As soon as you open the report, the Prompts window displays. Only FO Event type is required. It allows you to select **All**, **Expected** or **Reported** events. In addition, a wide variety of Optional Freight Order fields is also available.

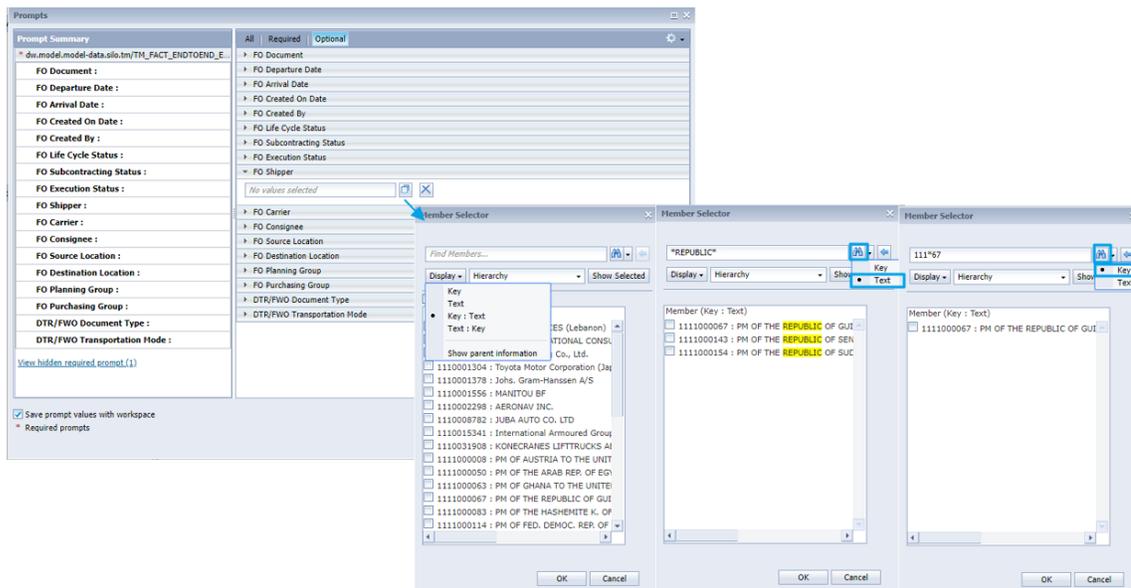


Transportation Management BI Report

Event Details



Tip: You may click on the  button to choose the values you are interested in. The wildcard * may be useful to search broadly by Keys (e.g. 111*67) or by Descriptions (e.g. *REPUBLIC*):



2. After entering the required filter, click **OK** and the report runs:

Transportation Management BI Report

Event Details

Event Description	FO Carrier Description	FO Document	Number of Freight Orders	Difference between Planned and Actual Date in Hours	Difference between Planned and Actual Date in Days	Difference between Reported and Submission Date in Days	Difference between Reported and Submission Date in Hours	Avg Difference between Reported and Submission Date in Days	Avg Difference between Reported and Submission Date in Hours	Avg Difference between Planned and Actual Date in Days	Avg Difference between Planned and Actual Date in Hours
Arrival at Destination		6100000403	1	8,380.43	349.18	0.00	0.00	0.00	0.00	349.18	8,380.43
		6100000404	1	8,571.21	357.14	0.00	0.00	0.00	0.00	357.14	8,571.21
		6100000435	1	7,279.86	307.49	0.00	0.00	0.00	0.00	307.49	7,279.86
	AIRCRAFT MAINTENANCE SUPPORT SERVICE LTD	6100010651	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	ALPHA LOGISTICS SERVICES (EPZ) LTD	6100011784	1	5,321.61	221.73	0.00	0.00	0.00	0.00	221.73	5,321.61
		6100011785	1	5,998.20	249.93	0.00	0.00	0.00	0.00	249.93	5,998.20
		6100011786	1	0.00	0.00	0.66	15.93	15.93	0.66	0.00	0.00
	Agripin Italy S.p.a.	6100012226	1	795.36	33.14	0.00	0.00	0.00	0.00	33.14	795.36
		6100012227	1	155.86	6.49	0.00	0.00	0.00	0.00	6.49	155.86
		6100012241	1	795.36	33.14	0.00	0.00	0.00	0.00	33.14	795.36
		6100012242	1	155.86	6.49	0.00	0.00	0.00	0.00	6.49	155.86
		6100012256	1	771.36	32.14	0.00	0.00	0.00	0.00	32.14	771.36
		6100012237	1	155.86	6.49	0.00	0.00	0.00	0.00	6.49	155.86
		6100012277	1	371.36	7.14	0.00	0.00	0.00	0.00	7.14	371.36
		6100012283	1	251.86	10.49	0.00	0.00	0.00	0.00	10.49	251.86
		6100012284	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		6100012295	1	747.36	31.14	0.00	0.00	0.00	0.00	31.14	747.36
		6100012360	1	675.36	28.14	0.00	0.00	0.00	0.00	28.14	675.36
		6100012361	1	299.86	12.49	0.00	0.00	0.00	0.00	12.49	299.86
		6100012391	1	675.36	28.14	0.00	0.00	0.00	0.00	28.14	675.36
		6100012392	1	421.29	17.55	0.00	0.00	0.00	0.00	17.55	421.29
		6100012448	1	651.36	27.14	0.00	0.00	0.00	0.00	27.14	651.36
		6100012449	1	297.29	16.55	0.00	0.00	0.00	0.00	16.55	297.29
		6100012683	1	411.36	17.14	0.00	0.00	0.00	0.00	17.14	411.36
		6100012684	1	109.29	4.55	0.00	0.00	0.00	0.00	4.55	109.29
		6100012697	1	315.36	13.14	0.00	0.00	0.00	0.00	13.14	315.36
		6100012809	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		6100012811	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		6100012812	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Aranes P/SC	6100000244	1	7,619.86	317.49	0.00	0.00	0.00	0.00	317.49	7,619.86
	Belore Logistics USA Inc	6100018701	1	7,009.32	292.06	0.00	0.00	0.00	0.00	292.06	7,009.32
	Belore Transport & Logistics Kenya Limited	6100018811	1	0.00	0.00	0.81	19.55	19.55	0.81	0.00	0.00
		6100018812	1	0.00	0.00	0.81	19.55	19.55	0.81	0.00	0.00
	Belore Logistics Italy spa	6100012217	1	323.86	13.49	0.00	0.00	0.00	0.00	13.49	323.86
		6100012268	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		6100012302	1	747.14	31.07	0.00	0.00	0.00	0.00	31.07	747.14

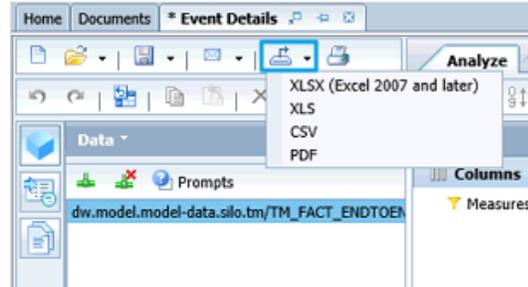
C. Refreshing the report

Once the report opens, you can decide to change the already selected filter values using the “Prompts” button:

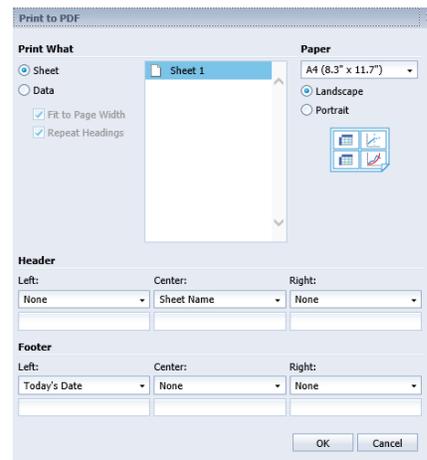
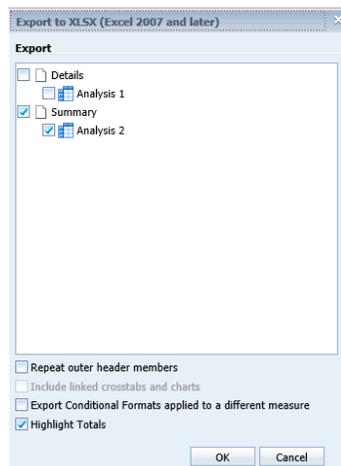
The screenshot shows the 'Prompts' dialog box in the BI report interface. The dialog is titled 'Prompts - Event Details' and contains a list of filters categorized into 'Required' and 'Optional'. The 'Required' filters include: FO Document, FO Departure Date, FO Arrival Date, FO Created On Date, FO Created By, FO Life Cycle Status, FO Subcontracting Status, FO Execution Status, FO Shipper, FO Carrier, FO Consignee, FO Source Location, FO Destination Location, FO Planning Group, DTR/FWFO Document Type, and DTR/FWFO Transportation Mode. The 'Optional' filters include: FO Arrival Date, FO Created By, FO Life Cycle Status, FO Subcontracting Status, FO Shipper, FO Carrier, FO Consignee, FO Source Location, FO Destination Location, FO Planning Group, DTR/FWFO Document Type, and DTR/FWFO Transportation Mode. The 'Event Type' filter is currently set to 'All'. At the bottom of the dialog, there is a checkbox labeled 'Save prompt values with workspace' which is checked, and 'OK' and 'Cancel' buttons.

D. Export Report

1. You can export the report to Excel, PDF or CSV (text format) by clicking on the Export icon as seen below:



2. When the Export dialog box opens, make sure you select the required data to export using the available options, depending on the chosen export format. Furthermore, by clicking on “Repeat outer header members”, each row of data will contain the header information for that data element. This is useful for exporting flat tables for further analysis in Excel.



3. A pop-up dialog will appear, where the option to open or save the file needs to be chosen.

Overview of the Report

A. Structure of Analysis Workspace

The screenshot below highlights the main different navigational elements of an Analysis Workspace:

FO Document	Number of Freight Orders	Difference between Planned and Actual Date in Hours	Difference between Planned and Actual Date in Days	Difference between Reported and Submission Date in Days	Difference between Reported and Submission Date in Hours	Avg Difference between Reported and Submission Date in Hours	Avg Difference between Reported and Submission Date in Days	Avg Difference between Planned and Actual Date in Hours	Avg Difference between Planned and Actual Date in Days
6100012261	1	100.01	4.17	0.00	0.00	0.00	0.00	4.17	100.01
6100012304	1	418.97	17.46	0.00	0.00	0.00	0.00	17.46	418.97
6100012267	1	337.12	14.05	0.00	0.00	0.00	0.00	14.05	337.12
6100012286	1	3.66	0.15	0.00	0.00	0.00	0.00	0.15	3.66
6100012287	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6100012288	1	0.25	0.01	0.00	0.00	0.00	0.00	0.01	0.25
6100012317	1	3.66	0.15	0.00	0.00	0.00	0.00	0.15	3.66
6100012318	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6100012319	1	0.25	0.01	0.00	0.00	0.00	0.00	0.01	0.25
6100012320	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6100012321	1	100.01	4.17	0.00	0.00	0.00	0.00	4.17	100.01
6100012376	1	167.21	6.97	0.00	0.00	0.00	0.00	6.97	167.21
6100012378	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6100012397	1	323.86	13.49	0.00	0.00	0.00	0.00	13.49	323.86
6100012398	1	332.73	13.86	0.00	0.00	0.00	0.00	13.86	332.73
6100012403	1	323.86	13.49	0.00	0.00	0.00	0.00	13.49	323.86
6100012404	1	332.73	13.86	0.00	0.00	0.00	0.00	13.86	332.73
6100012409	1	323.86	13.49	0.00	0.00	0.00	0.00	13.49	323.86
6100012410	1	332.73	13.86	0.00	0.00	0.00	0.00	13.86	332.73
6100012426	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6100012427	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6100012432	1	341.77	14.24	0.00	0.00	0.00	0.00	14.24	341.77
6100012445	1	323.86	13.49	0.00	0.00	0.00	0.00	13.49	323.86
6100012446	1	332.73	13.86	0.00	0.00	0.00	0.00	13.86	332.73
6100012471	1	341.77	14.24	0.00	0.00	0.00	0.00	14.24	341.77
6100012550	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6100012850	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6100012851	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6100012852	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6100012004	1	1,109.77	46.24	0.00	0.00	0.00	0.00	46.24	1,109.77
6100012005	1	611.86	25.49	0.00	0.00	0.00	0.00	25.49	611.86
6100012223	1	821.79	34.24	0.00	0.00	0.00	0.00	34.24	821.79
6100012224	1	340.85	14.20	0.00	0.00	0.00	0.00	14.20	340.85
6100012225	1	611.33	25.47	0.00	0.00	0.00	0.00	25.47	611.33

1. Data Panel

The data panel displays the *Measures* and *Characteristics* available to use in the report. The data panel is used to select the required information to perform navigation functions, such as adding characteristics to rows or columns or including new background filters.

Measures and Characteristics are the main components of an Analysis Workspace:

- **Measure** 📊: Numerical values or metrics which are measured in the analysis (e.g. *Number of Events*).
- **Characteristic** 🏷️: Fields in Umoja that are used to differentiate and analyse measures under different perspectives (e.g. *FO Carrier*).

2. Layout Panel

The *Layout panel* is the panel adjacent to the *Data panel* and here you can:

- Drag and drop different characteristics and measures into the Rows or Columns of your analysis, as with Pivot tables in Excel.
- Drag and drop one or more measures or characteristics as Background Filters to your analysis.
- Perform navigational operations on characteristics and measures including filtering, re-ordering and swapping objects.

3. Analysis Panel

The Analysis window is the primary part of the screen displaying the rows and columns in a spreadsheet form for the selected data. It is located on the right of the *Layout panel*. This window displays the core components of the Analysis Workspace report.

Normally, the measures for a specific Analysis Workspace are set in the *Columns Section* of the analysis, while characteristics are placed in the *Rows section*.

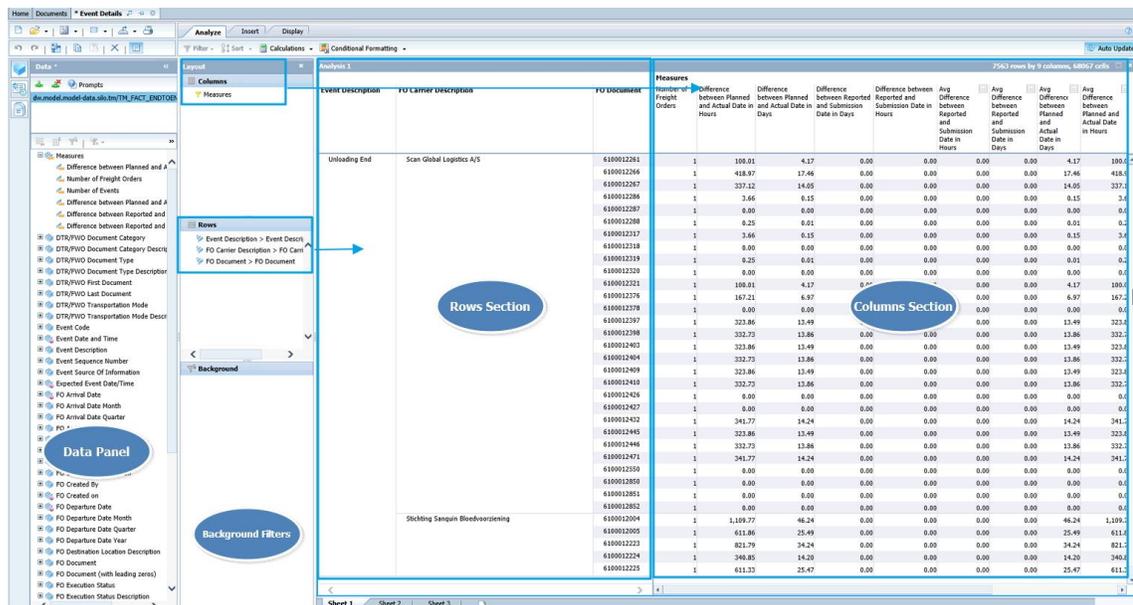
The Analysis Panel can contain more than one Tab with different analysis or charts.

4. Calculations

The Calculations pane displays the Custom Calculations done in the Analysis Workspace. Here you can create a new measure based on the existing ones, edit or delete the custom calculations.

B. Layout of the Report

Analysis Workspaces have the following structure:



- **Data Panel**

It contains all the Characteristics and Measures that users may add to their ad-hoc analyses.

- **Measures:**

- **Difference between Planned and Actual Date in Days:** Number of days ranging from the date when the event occurred (Reported Date and Time), or Current Date and Time in case Reported Date and Time does not exist, and when it was planned (Expected Date and Time). The measure calculates differences if Expected Date is prior to Current Date
 - **Number of Freight Orders:** Counter of Freight Order (FO) documents
 - **Number of Events:** Counter of Execution Events

- **Difference between Planned and Actual Date in Hours:** Number of hours ranging from the date when the event occurred (Reported Date and Time), or Current Date and Time in case Reported Date and Time does not exist, and when it was planned (Expected Date and Time). The measure calculates the difference if Expected Date is prior to Current Date
 - **Difference between Reported and Submission Date in Days:** Number of days ranging from the date when the event was reported (Event Date and Time) and when the event was recorded in the system, (Message Date and Time (First)), taken to mean the submission date
 - **Difference between Reported and Submission Date in Hours:** Number of hours ranging from the date when the event was reported (Event Date and Time) and when the event was recorded in the system, (Message Date and Time (First)), taken to mean the submission date
- **Characteristics:**
 - **DTR/FWO Document Category:** It is the DTR/FWO document category identifier.
 - **DTR/FWO Document Category Description:** The description of the document category

Document Category	Description
02	Delivery-Based Transportation Requirement
03	Forwarding Order

- **DTR/FWO Document Type:** The document type identifier
 - **DTR/FWO Document Type Description:** The document type description.

Document Type	Description
ZD01	DTR for UNOE
ZD02	DTR for STO
ZFW1	Forwarding Order for COE
ZFW2	Forwarding Order for COE Troops
ZFW3	Forwarding Order for Troops Land and Sea
ZFW4	Forwarding Order for Wide Body (LTC)

- **DTR/FWO First Document:** First Delivery Transport Requirement or Forwarding Order linked to the Freight Order events
 - **DTR/FWO Last Document:** Last Delivery Transport Requirement or Forwarding Order linked to the Freight Order events
 - **DTR/FWO Transportation Mode:** The shipping transportation mode

Transportation Mode	Description
01	Road
02	Rail

03	Sea
04	Inland Waterway
05	Air
...	..

- **DTR/FWO Transportation Mode Description**
- **Event Code:** It is the event identifier code. For example:

Event Code	Event Description
ARRIV_DEST	Arrival at Destination
DAMAGE	Damage
LOAD_BEGIN	Loading Begin
DEPARTURE	Departure
...	..

- **Event Description**
- **Event Sequence Number:** It is a number that shows the position of the event within the sequence of events recorded in the system. For example:

Sequence Number	Event Code	Event Description
000085	ZCAR_INFO	Cargo Information
000090	ZHANDOVER_DOC	Handover Document
000100	LOAD_BEGIN	Loading Begin
000200	LOAD_END	Loading End
000300	POPU	Proof of Pickup
000400	DEPARTURE	Departure
000410	ZDOC_SENT	Documentation Sent
000420	ZDOC_COMPLETE	Documentation Complete
000500	CLEAR_CUSTOMS	Clear Customs
000580	ZTAX_EXEMPT	Tax Exemption
000590	ZCLEAR_CUSTOMS	Clear Customs
000600	ARRIV_DEST	Arrival at Destination
000700	UNLOAD_BEGIN	Unloading Begin
000800	UNLOAD_END	Unloading End
000900	POD	Proof of Delivery
1000	ZLOSS	Loss
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- **Event Date and Time:** It is the date and time of the event. By default, it stores when the event happened (Reported Date and Time). If this does not exist, it stores when it was planned (Expected Date and Time)
- **Event Source of Information:** It is the description of the event's source

Description
Recorded Directly in this Document
Propagated from SAP EM
Propagated from Predecessor Document
Propagated from Successor Document
Derived from Handling Execution
Read from SAP EM
Received via (Un)Loading Notification
Received via SAP TM Collaboration Portal
Recorded by Shipper
Propagated from Export Document

- **Expected Event Date/Time:** It is the date and time when the event was planned
- **FO Arrival Date Month**
- **FO Arrival Date Quarter**
- **FO Arrival Date Year**
- **FO Carrier:** Freight forwarder identifier
- **FO Carrier Description:** Freight forwarder name
- **FO Consignee:** Plant identifier
- **FO Consignee Description:** Plant description
- **FO Created By**
- **FO Created on**
- **FO Departure Date:** Departure of the Freight Order
- **FO Departure Date Month**
- **FO Departure Date Quarter**
- **FO Departure Date Year**
- **FO Destination Location Description**
- **FO Document**
- **FO Document (with leading zeros)**
- **FO Execution Status:** It is the Freight Order execution status identifier
- **FO Execution Status Description:** The execution status description

Execution Status	Description
01	Not Relevant
02	Not Started
03	In Execution
04	Executed

05	Interrupted
06	Canceled
07	Ready for Transportation Execution
08	Not Ready for Transportation Execution
09	Loading in Process
10	Capacity Planning Finished

- **FO Life Cycle Status:** It is the Freight Order life cycle status identifier.
- **FO Life Cycle Status Description:** The life cycle status description

Life Cycle Status	Description
00	Draft
01	New
02	In Process
05	Completed
10	Canceled

- **FO Planning Group:** It is the Freight Order Planning and Execution Group. For example:

Planning Group	Description
50000633	Planning & Execution Field Supp
50000662	Planning & Execution Vehicles
---	---

- **FO Planning Group Description**
- **FO Purchasing Group**
- **FO Purchasing Group Description**
- **FO Shipper:** Vendor identifier
- **FO Shipper Description:** Vendor name
- **FO Source Location Description**
- **FO Subcontracting Status:** It is the Subcontracting status identifier
- **FO Subcontracting Status Description:** The subcontracting status description

Subcontracting Status	Description
01	No Subcontracting Result
02	In Tendering
03	Carrier Assigned
04	Sent
05	Changed After Sending

- **FO Transportation Mode:** It is the transportation mode identifier
- **FO Transportation Mode Description**

Transportation Mode	Description
---------------------	-------------

Transportation Management BI Report

Event Details

01	Road
02	Rail
03	Sea
04	Inland Waterway
05	Air
06	Parcel
UN	Multiple Mode

- **FU First Document:** Only first and last Freight Unit documents are provided
- **FU Last Document**
- **Message Date and Time (First):** It is the date when the event was recorded in the system, taken to mean the submission date. Only first and last are provided when more than one is recorded.
- **Message Date and Time (Last)**
- **Reported Event Date/Time:** It is the date and time when the event happened.

Note that any Measure or Characteristic can be added dynamically to the Rows, Columns or Background sections:

The screenshot shows a BI report interface with a 'Layout' pane on the left and a data table on the right. The 'Layout' pane has three sections: 'Columns', 'Rows', and 'Background'. The 'Columns' section contains 'Event Description', 'FO Carrier Description', and 'FO Document'. The 'Rows' section contains 'Event Sequence Number', 'Event Source Of Information', 'Expected Event Date/Time', 'FO Arrival Date', 'FO Arrival Date Month', 'FO Arrival Date Quarter', 'FO Arrival Date Year', 'FO Carrier', 'FO Carrier Description', 'FO Consignee', 'FO Consignee Description', 'FO Created By', 'FO Created on', 'FO Departure Date', 'FO Departure Date Month', 'FO Departure Date Quarter', 'FO Departure Date Year', 'FO Destination Location Description', 'FO Document (with leading zeros)', 'FO Execution Status', 'FO Execution Status Description', 'FO Life Cycle Status', 'FO Life Cycle Status Description', 'FO Planning Group', 'FO Planning Group Description', 'FO Purchasing Group', 'FO Purchasing Group Description', 'FO Skipper', 'FO Shipper Description', 'FO Source Location Description', 'FO Subcontracting Status', 'FO Subcontracting Status Description', 'FO Transportation Mode', 'FO Transportation Mode Description', 'FU First Document', 'FU Last Document', and 'Message Date and Time (First)'. The 'Background' section is empty. The data table on the right has columns for 'Event Description', 'FO Carrier Description', 'FO Document', 'Number of Freight Orders', 'Difference between Planned and Actual Date in Hours', 'Difference between Planned and Actual Date in Days', 'Difference between Reported and Submission Date in Days', 'Difference between Reported and Submission Date in Hours', 'Avg Difference between Reported and Submission Date in Hours', 'Avg Difference between Reported and Submission Date in Days', 'Avg Difference between Planned and Actual Date in Hours', and 'Avg Difference between Planned and Actual Date in Days'. The table contains multiple rows of data for various events and carriers.

The report contains one tab:

- **Columns Section**

It provides the following Measures:

- **Difference between Planned and Actual Date in Days:**
- **Number of Freight Orders**

- **Difference between Planned and Actual Date in Hours**
- **Difference between Reported and Submission Date in Days**
- **Difference between Reported and submission Date in Hours**

The averages below are obtained dividing the Difference measures by the Number of Freight Orders

- **Avg Difference between Planned and Actual Date in Hours**
 - **Avg Difference between Planned and Actual Date in Days**
 - **Avg Difference between Reported and Submission Date in Days**
 - **Avg Difference between Reported and Submission Date in Hours**
- **Rows Section**

The Rows Section contains the characteristics or dimension attributes. In this tab, it contains the *Event Description*, *FO Carrier Description* and *FO Document* as the default option to aggregate and visualize the measures.
 - **Background Filters**

Background filters apply restriction of data to the entire Analysis, in this case there are no background filters applied by default.

Please refer to the next section Scope Determination to understand important concepts used in the background for the calculations.

Scope determination

The below **conditions** apply in the logic selected to retrieve the data for the report:

- The report selects all the Freight Orders Execution Events with no restrictions.

Additional Resources

NV301 Umoja Advanced BI Navigation guide:

https://umoja.un.org/sites/umoja.un.org/files/nv301-umoja_advanced_bi_navigation_cbt_v9.pdf