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Objective

This Job Aid explains how to assign a Carrier (Freight Forwarder) and Freight Purchase Order to a Freight Order and send details through the Electronic Data Interchange (EDI) system to an external partner (with EDI capability) who has been assigned as a Carrier to a Freight Order.

Overview

The TM STO Transportation Planner (TS.07) or TM STO Freight Procurement (TS.08), in **Non-DAP** Incoterm scenarios, is required to:

- 1. Assign a Carrier (Freight Forwarder) to the Freight Order
- 2. Send Freight Order details to the assigned Carrier
- 3. Check and track Events received from the Carrier

In addition, for vendor managed legs (In Incoterm scenarios like DAP, FCA, etc.), it is also required to track events received from the goods vendor for each freight order.

The **EDI** system adds the following features to TM:

- It automatically sends Freight Order Details from TM to the assigned Carriers once a day
 It also allows users to manually send Freight Order Details from TM to the Carrier
- <u>It automatically receives in Umoja TM, the event details submitted in the Goods</u> <u>Vendor/Carrier's system that is EDI enabled for the UN.</u>
 - Vendors/Freight Forwarders can send all expected and unexpected events along with attachments through their EDI enabled system.
 - Vendors/Freight Forwarders using EDI are no longer required to use Carrier Collaboration Portal (CCP) or offline communication.
 - Vendors /Freight Forwarders must be aware that the proof of delivery is the last event and after that, no further events can be sent by them.

Notes:

- Freight orders with dummy carrier (unassigned) or with *any_port* as source or destination location cannot be sent through EDI.
- It is not enough if the Goods Vendor/Carrier uses EDI with other clients. A technical connection/testing process with Umoja is required to qualify for TM-EDI.

TM – Electronic Data Interchange (EDI)



Enterprise Role(s)

Role ID	Role Name
TS.01	TM Transportation Planner
TS.02	TM Manage Freight Order
TS.07	TM STO Transportation Planner
TS.08	TM STO Freight Procurement

Procedure

CARRIER ASSIGNMENT

- 1. Connect to TM
- 2. Click on Freight Order Management tab:

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- tage law	Overview reight Orders	1212.10
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- 0404 1997 Date	Tradigit Crosset - An Program Colores	Oncy they form the large features
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- 3. Search for Freight Orders you want to work on by typing the Freight Order number and clicking on "apply".
- 4. Once the Freight Orders appear below, select all the Freight Orders to assign a Carrier (freight forwarder) to and click on the subcontracting button:

Analas Daises County Facility Collins and Decours	View: [Standard View] Image: Standard View] Im								
Assign Driver Create Freight Settlement Document Calculate Charges Customs Attach Cancel Document Mass Output Mass Change Export									
Q Refresh									
Document	Carrier Description	SCAC	Source Location Description	Source Location Address	First Activ				
6100000259 ZFO1	J.A.S. Jet Air Service SPA /	Dalian-Port		Dalian	21.03.201				

TM – Electronic Data Interchange (EDI)



- 5. A list of options will appear.
- 6. Click on assign Carrier and SRM freight PO:

View: [Standard View]	✓ Sew	Multiple Copies	Display	Edit Transportation	Cockpit Create De	liveries in ERP				
Scheduling Create Load Plan Set Status Load Plan Status Execution Status Set Manual Block Remove Manual Block Subcontracting										
Assign Driver Create	Assign Driver Create Freight Settlement Document Calculate Charges Customs Attach Cancel Document Mass Output Mass Send to Carrier									
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C Document	Document	Carrier Description	SCAC S	ource Location Description	on Source L	Assign Carrier Manually				
610000259	7E01	LAS let Air Service SPA /	ſ	Dalian Part		Assign carrier and SRM freight PO				
010000233	2101	U.A.O. DELAN DELAICE OF ATT.		Danan-r Ull		21.03.201				

7. A popup window will appear, please fill the Business Partner (BP number) of the Carrier (Freight Forwarder) and the SRM Freight PO. For the Carrier, you can also click on the matchbox next to 'carrier' and search for the business partner by clicking "search" and select the carrier. Once filled, Click 'ok':

Home	ERP Logistics Integration	Fre Ma	ight Order Planning nagement					
✓ Freight Orde	er	<	Overview Freight C	orders			Busi	iness Context Vi
Overview Create Fr Edit Freig Display F Attach Mu	r Freight Order eight Order ht Order reight Order uiti files to FO's		Calculation Level: Created By: PO/STO: ECC Delivery: SRM Freight PO: Calculated Dates Apply Clear		To		9 9 9 9 9	
			View: [Standard View] Scheduling Create Load P Assign Driver Create Freig	An Se Assign Carrier/Freight	s Display / Edit	Transportation Cockpit anual Block Remove Manu Cancel Document Mass Or	Create Deliveries in ERP al Block Subcontracting utput Mass Change Expo	irt "
			Document 6100013045 6100013027 6100013028 6100013029	Docut Carner: ZF03 SCAC: ZF01 Freight Purc. Order: ZF01 Freight Purc. Order:	OK Cancel	e Location Description eston-Port o (United States) Inc Hariri International Airport air County International Air	Source Location Address Charleston SC 1009 Think Place / Morrisvil Beirut Port Huron MI	First Activ 27.12.201 19.12.201 21.12.201 20.12.201

8. Click refresh and confirm that "Carrier description" column has changed:

Annual International Manual	and the Partners	IPh IPh the distance III	Disalar III	P F 48	Crowle Dalhanian in FDD	
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Assign Driver Cres	te Freight Settlement Do	cument Calculate Charges	Customs	Cancel Document Mass Output	Mass Change Export	
C Retresh						
Document	Document	Carner Description	CAC	Source Location Description	Source Location Address	First Act
6100028432	ZF01	J.A.S. Jet Air Service SPA /		Baghdad International Airport	Baghdad	03.10.20
6100028433	2E01	J.A.S. Jet Air Service SPA /		Brindisi # Salento Airport	L Brindisi BR	03 10 20

Note: If there is a need to update the carrier, simply perform the same action again and the new carrier details will override the previous one. Once the carrier is assigned, the system will automatically send the details to the Carrier. There is a batch process that performs this task once a day.

This task can be performed manually without waiting. Follow the next steps:

TM – Electronic Data Interchange (EDI)



SENDING FREIGHT ORDER DETAILS MANUALLY

- 9. Select all Freight Orders
- 10. Click on subcontracting
- 11. Click on send to Carrier:

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Scheduling Create Load Plan Set Status Load Plan Status Execution Status Set Manual Block S											
	Assign Driver Create Freight Settlement Document Calculate Charges Customs Attach Cancel Document Mass Output Mass Send to Carrier										
	Carrier Selection										Carrier Selection
Π	6	Document	Document	Carrier Description	SCAC	CAC Source Location Description			Sou	rce Loc	Assign Carrier Manually
		6100000259	ZF01	J.A.S. Jet Air Service SPA /		Dalian-Port		Dalian-Port Dalia		an	Assign carrier and SRM freight PO 21.03.201

- 12. Select Ok in the pop-up window.
- 13. The dialog box on top will confirm that XML files were sent to the Carrier:

P NetWeav	er Business Client							
Homa	ERP Logistics	Freight Order Planning						
Tome	Integration	Management						
		Overview Freigh	t Orders				Ц4 в	usiness Context Vid
reight Orde	r	_					68 X	s 2.
Overview	Freight Orders	Invoicing St	atus: 🗇 🗇					
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		Assign Driver Create	Freight Settlement Doo	cument _ Calculate Charges	Customs _	Cancel Document Mass Output	Mass Change Export	× •
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		C Document	Document	Carrier Description	SCAC	Source Location Description	Source Location Address	First Activ
		6100028432	ZF01	J.A.S. Jet Air Service SPA /		Baghdad International Airport	Baghdad	03.10.201
		6100028433	ZF01	J.A.S. Jet Air Service SPA /		Brindisi # Salento Airport	I- Brindisi BR	03.10.201

The action of "sending Freight Order details manually" can also be performed from a specific Freight Order window:

- 14. Open the Freight Order
- 15. Click on Edit
- 16. Click on Subcontracting

6	Di	splay UNOE Planned Frt O	order (FF Deliv) 6100028432 ·	Internet Exp	lorer		-	D X
Display UNOE Planned F	rt Order (FF De	eliv) 6100028432	_		_	Bu	siness Cont	ext Viewer
🔚 Save 🗙 Cancel 🥒 Edit	Refresh Copy	Multiple Copies	Follow Up Scheduling S	ubcontracting	reate Service Order	Schedule 2	1	.0.
General Data Busing	ess Partner Iten	ns Stages Utilizat	ion Subcontracting	Docume	nt Flow Charge	s Execution	Notes	- ⁻
General Information			Transportation					
Document Type:	ZFO1 UNOE Plan	med Frt Order (FF Deliv)		Carrier:	1110002094	J.A.S. Jet Ai SCAC		
Description			Exec	uting Carrier:		SCAC		
Transportation Mode:	01	Road	Communi	ication Party:				
Means of Transport:	UNOE_TRK	UNOE Truck	Srvc.	Lvl – Carrier:				
Schedule:			To	tal Distance:	17.419	KM		
			Gross Duration/Total I	Net Duration:	:13	:13		
Resource Capacity				First Activity:	03.10.2019 10:06:08 IRA	Q		
Vehicle:	UNOE_TRK	UNOE_TRK		Last Activity:	03.10.2019 10:19:12 IRA	Q		



17. Click on "send to Carrier" under the subcontracting icon on the top menu. Click "ok" in the pop-up dialog box:



18. You will see the confirmation on the right-hand corner that the xml file was sent:

Edit UNOE Planned Frt Ord	er (FF Deliv) 610	0013049				L 4	Busines	s Context View
Save Cancel / Edit Refr	resh Copy Th Multiple	e Copies Check	Follow Up Scheduling Subcontracting				» 🗌	
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				XML messa	ge was sent with ID 005056AA	2C4D1EEA8C9	-	
General Information			Transportation		- 			
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Description:				Charge calc	ulation completed		AC:	Ð
Transportation Mode:	01	Road	Com	munication Party:	- C			
Means of Transport:	UNOE_TRK	UNOE Truck	s	ervc. Lvl – Carrier:				
Schedule:				Total Distance:	0.941	KM		
			Gross Duration/T	otal Net Duration:				
Resource Capacity				First Activity:	06.02.2020 09:41:54 LBANO	N		
Vehicle:	UNOE_TRK	UNOE_TRK		Last Activity:	06.02.2020 09:42:36 LBANO	N		
Registration Country/No.:	- D			Number of Visits:	2			
Weight:	1,000	KG 🗇		Loading Stops:	1			
Volume:		МЗ 🗇		Unloading Stops:	1			
			Organizational Data	I				
Trailer:	ď		Purchas	ing Organization:	PO_1000	United Nations Purcha	sing Org.	
Registration Country/No.:	- D		F	urchasing Group:	PG_FIT01	FIT01 - UNGSC F. PR	ос	
Cargo Information			Planning and Execu	tion Organization:	PE_1000	United Nations Plannin	g & Execu	ution Org.
Cargo Weight:	3	KG	Planning and	Execution Group:	PE_PIT01	Planning & Execution I	T01	
Cargo Volume:		M3	Per	son Responsible:				
Quantity:	1	EA	Accoun	t No. with Carrier:				
Maximum Utilization in Percent:	0%	Check						
Source			Destination					



Exceptions

A. In case of any_port source or destination, the below error will be seen in the upper right corner when you click on "send to Carrier" under the subcontracting icon in Edit mode:

9		Edit UNO	E Planned Frt Order (Fl	F Deliv) 6100013050 - Internet Explo	rer	- ā	X
Edit UNOE Planned Frt O	rder (FF Deliv) 6	100013)50			III Business Contex	d Viewer
Save Cancel Edit I Document Type.	Refresh Copy N	ultiple Copies neu Fit Oraer	Check Follow Up	All () 1		😤 🗙 淋 🔐	. @ .
Description:				 Action cannot be performed due 	to location ANY_PORT_U	AE AC	p 1
Transportation Mode:	03	Sea		Communication Party.	0		
Means of Transport	UNOE_SEA	UNOE Sea		Srvc. Lvl - Carrier:	Ó		
Schedule:				Total Distance:	2,133.969	KM	
				Gross Duration/Total Net Duration:	154:41	106:41	
Resource Capacity				First Activity:	31.01.2020 00:00:00 UT	C+3	
Vehicle:	UNOE_SEA	UNOE_SE	\	Last Activity:	06.02.2020 09:41:54 LB	ANON	
Registration Country/No.:	d'			Number of Visits:	2		
Weight	9,072,000	KG 🗇		Loading Stops:	1		
Volume:		M3 🗇		Unloading Stops:	1		
				Organizational Data			
Trailer:	G			Purchasing Organization:	PO_1000	United Nations Purchasing Org.	
Registration Country/No.:	đ			Purchasing Group:	PG_FIT01	FIT01 - UNGSC F. PROC	
Cargo Information				Planning and Execution Organization:	PE_1000	United Nations Planning & Execution 0	Org
Cargo Weight:	3	KG		Planning and Execution Group:	PE_PIT01	Planning & Execution IT01	
Cargo Volume:		M3		Person Responsible:	Ó		
Quantity:	1	EA		Account No. with Carrier:			
Maximum Utilization in Percent:	0%	Check					
Source				Destination			
Location:	ANY_PORT_UAE	Dubai		Location:	NAQOURA_PORT	Naqoura	
Departure Date:	31.01.2020	00:00:00	UTC+3	Arrival Date:	06.02.2020	09:41:54 LBANON	

B. In case of dummy_carrier, the below error will appear if you click on "send to Carrier" under the subcontracting button in Edit mode:

Edit UNOE Planned Frt Order (FF Deliv) 6100013382 - Internet Explorer					
Edit UNOE Planned Frt Order (FF Deliv) 6100013382					
Edit Refresh Copy hultiple Copies	Check Follow Up Scheduling Subo	contracting Create Service Order Sc All	〕1 <u>∧</u> 1		
 General Data Business Partner Items Stages 	Utilization Subcontracting	Document Flow Charges	ata has been changed in parallel session		
Subcontracting Data		Subcontracting Relevance	ction cannot be performed due to carrier ZDUMMY_CAR		
Carrier: ZDUMMY_CAR	Dummy Carrier / New York NY 10017	Subcontracting Relevance:	Relevant for Subcontracting		
Continuous Move ID:		Freight Agreement Reference			
Partner Reference Number:		Freight Agreement/Version:	C C		
Road Bill of Lading Number:	Not Drawn	Freight Agreement Item:	đ		
Tendering Overview Carrier Ranking Continuous Move Documents					

Revision History (Soft Copy only)

Date	Version	Prepared by	Description
10 January 2020	1	TM Project Team	Version 1

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