

TMS@Schaeffler



Training Documentation for Suppliers TMS Supplier WebApplication Version 3.1 January 2024

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1 Introduction

Schaeffler has implemented a Transport Management System (TMS) which expands the visibility of the transportation network and allows Schaeffler to take active control over freight management. With TMS Schaeffler can now smartly plan and optimize transports, monitor freight statuses, flexibly resolve incidents, allocate costs correctly and settle them efficiently. TMS covers all regions, divisions, plants and locations, all transport modes (sea, road, rail, air, parcel) and all transport networks (inbound, outbound, intercompany) at Schaeffler.

For Suppliers there is a special “TMS Supplier WebApp” designed. Suppliers need to use the “TMS Supplier WebApp” to release and confirm the transport demands regarding Schaeffler and to enter status information. Based on this information Schaeffler Transport Management will plan and organize the transports and orders the Logistic Service Providers.

This training document explains the process context and the necessary process steps which are relevant for Schaeffler Suppliers regarding the “TMS Supplier WebApp”.

Right now Schaeffler is in the transition phase until the worldwide Rollout of TMS is completed.

During this transition phase each supplier is informed for which Schaeffler plant the use of the “TMS Supplier WebApp” is mandatory.

1.1 Whom to contact

Schaeffler TMS Team:

OR-HZA-OTM-Transport@schaeffler.com

In case you have problems or questions how the TMS works or there are problems or questions regarding a transport.

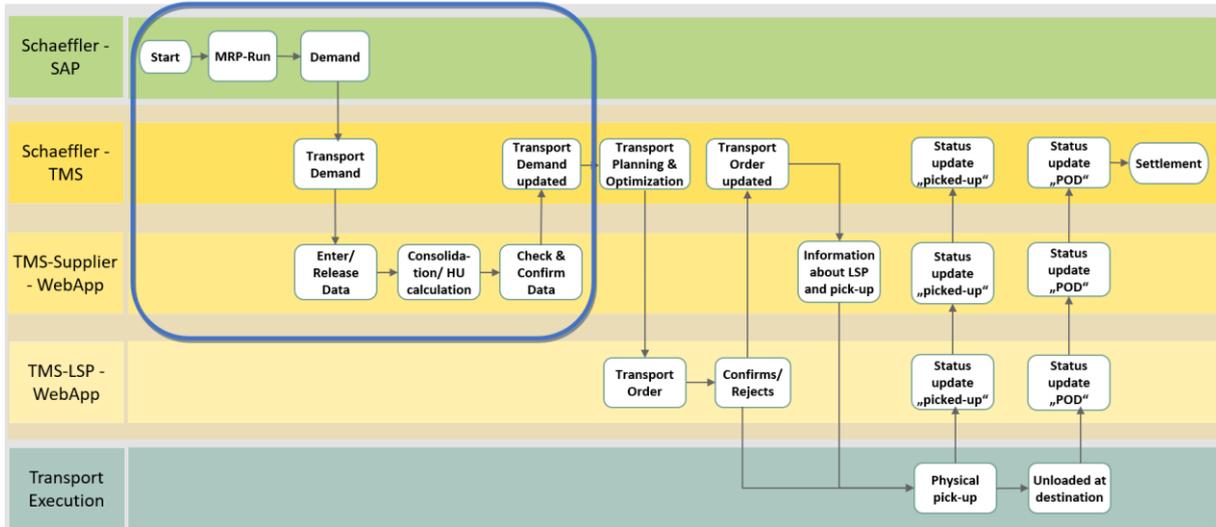
Important: Please notify us in case you want to release and confirm a transport but do not see a demand in TMS.

Schaeffler Material Planner:

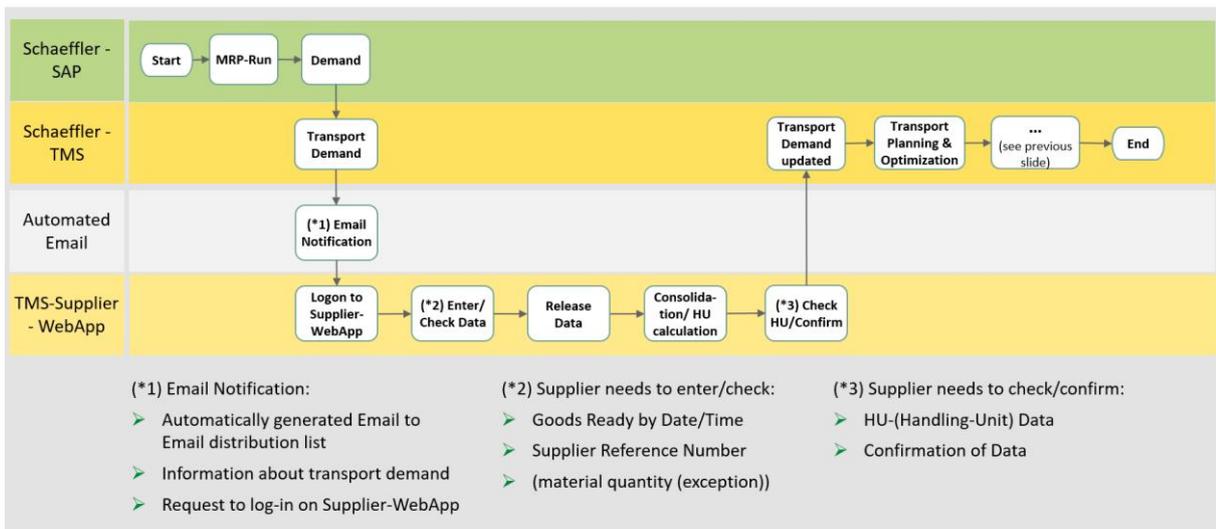
In case you have questions or problems to a demand (requested material quantity, delivery date, ...) contact the responsible material planner at Schaeffler.

2 Process Context

TMS@Schaeffler: Overview Process Inbound



TMS@Schaeffler: Supplier-relevant Process Steps



3 How to connect and log on to TMS Supplier-WebApp

Step 3.1: Use one of the supported browsers:

Firefox, Edge, Chrome or Safari for Mac

Step 3.2: Use the following link:

Link to productive environment: -> daily business

<https://otmgm-a611142.otm.em2.oraclecloud.com/>

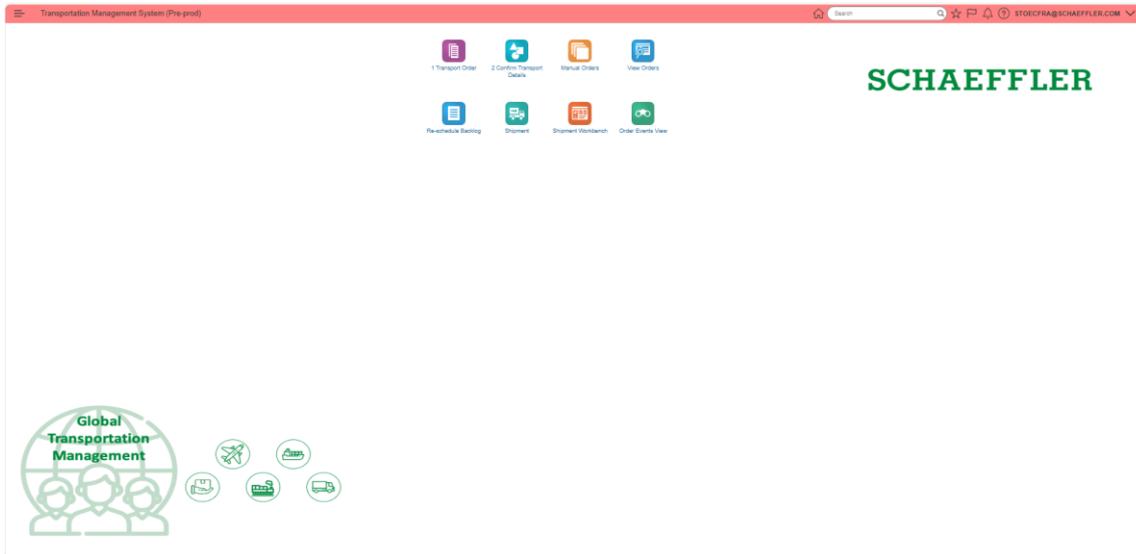
Link to test environment: -> only for testing

<https://otmgm-test-a611142.otm.em2.oraclecloud.com/>

Step 3.3: Now you need to enter your Username and Password:

The screenshot shows the Oracle Cloud sign-in interface. At the top, it says "ORACLE Cloud" followed by the account ID "a611142" and "Oracle Cloud Account Sign In". There are two input fields: "User Name" with the placeholder "User name or email" and "Password" with the placeholder "Password". Below these is a blue "Sign In" button. A red arrow points to the "Sign In" button with the instruction "3. Click on sign in". To the right of the input fields, there are numbered instructions: "1. Enter your User Name" with a sub-note "Your user name is your company-email-address" and "2. Enter Password". At the bottom of the page, there is a link: "Need help signing in? Click here".

Step 3.4: You are on the Supplier Home Screen:



With click on the  you always get back to the Home Screen.

Overview about the Functionalities:



1 Transport Order

Standard Process Step 1: All transport demands are listed which were transferred from Schaeffler SAP-System to TMS. Supplier needs to enter „Goods Ready by Date/Time“, Supplier Reference Number, check Quantity and proposed Transport Handling Unit and release the data.



2 Confirm Transport Details

Standard Process Step 2: The released transport demands are consolidated (if possible) and TMS calculated the Handling Units based on packaging instructions. Supplier needs to check the proposed Handling Unit(s) and confirm.



Manual Orders

Exception Case: If a transport needs to be organized when no transport demand was created by Schaeffler SAP. (This manually created transport demand is also visible in “View Orders”)



View Orders

Here a Supplier can see all his transport demands which are managed in the TMS.



Re-schedule Backlog

Exception case: In case of "Backlog" Supplier can adjust the delivery date of a transport demand.



Shipment

Supplier can see his transport demands consolidated to a vehicle which is doing the Pick up and which Logistic Service Provider is doing the transport.



Shipment Workbench

Supplier can see all shipments which contain his orders with an additional map and the transport demands in one screen.



Order Events View

Supplier can see the status (events/incidents) of his transport demands. E.g. If it is already delivered at Schaeffler or if there was a delay and why.

4 Standard Process: 1 Transport Order and 2 Confirm Transport Details

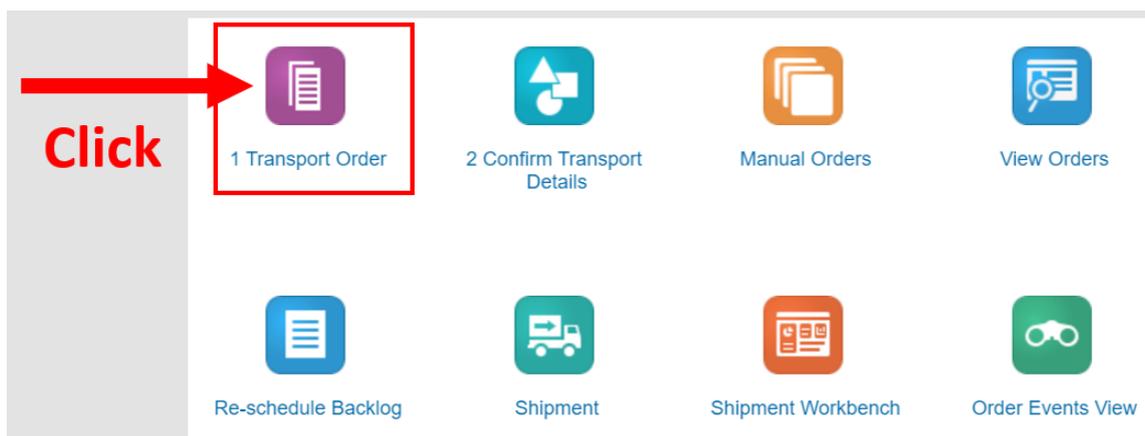
4.1 Standard Process Part 1: 1 Transport Order

As described above, by clicking on “1 Transport Order” you see all demands which are transferred from Schaeffler SAP to Schaeffler TMS which need to be transported.

Supplier has to check the transport demands which are based on purchase orders or scheduling agreements and needs to check and enter information and confirm the order (transport demand).

How to start:

1. An Email Notification informs you about a new transport demand.
2. Please log on to TMS Supplier-WebApp as described in chapter 3.
3. Click on “1 Transport Order”.



4. Now you see all your orders which were created based on Schaeffler SAP System.
The columns where you can change/enter data are marked by *.

Order Base ID shows the order number based on Schaeffler SAP.

The ID of an order (e.g. SA-0005293779-00010-0741-000) has the following meaning:

- SA = Scheduling Agreement (it can also be: PO=Purchase Order)
- 0005293779 = number of the scheduling agreement in SAP (or of the PO in SAP)
- 00010 = Position Item (of SA or PO)
- 0741 = Scheduling line (of SA or PO)
- 000 = additional identifier in TMS

5. Based on the Order Base ID and the delivery date you select the demand **1** you want to ship and then check/enter/change the required data **2-6**.

Latest Possible Goods Ready by Date

Another important field is

The “Latest Possible Goods Ready by Date” shows you the date when it is the latest date when goods need to be picked up by LSP (Logistic Service Provider). This date is calculated based on delivery date and standard transport transit time. So latest one day before this date until 11 o’clock you need to release and confirm the demand as described below.

Order Base ID	Material ID	Material De...	Ordering Schaeffler ...	Material Quanti...	Already Released Q...	*Quantity to be Shipped	*Transport Handling Unit
SA-0005293779-00010-0...	2353784530000	F-357105.06-...	0007-Hirschald	12000	4350	7650	HALF-EUR-PAL-800X800MM
SA-0005293779-00010-0...	2353784530000	F-357105.06-...	0007-Hirschald	12000		12000	HALF-EUR-PAL-800X800MM
SA-0005293779-00010-0...	2353784530000	F-357105.06-...	0007-Hirschald	12000		12000	HALF-EUR-PAL-800X800MM

Select the demand you want to ship by clicking on the square.

With “double click” you can enter/change the fields marked with the red *.

7650

Then you see pen-symbol and can click in the field and enter your data and save with click on “OK”.

OK Cancel

This is the quantity you have to ship. The quantity is pre-populated with the ordered quantity. Only in exceptional cases when you cannot deliver the requested quantity in full and it is agreed with Schaeffler Material Planner you adjust the quantity.

Here you see the Transport Handling Unit the TMS has defined based on packaging instructions. If this is not correct you need to change this entry. In case of “Parcel” you have to change it to “NON-PALLETIZED”.

(Pre-Prod)



Search



*Supplier Reference Number	*Goods Ready By Date	*Goods Ready by Location
TEST REF NO. 123	29/10/2021 14:48 Europe/Berlin	360933-VE
		360933-VE
		33-VE

4

It is mandatory to enter your Reference Number. E.g. your Delivery Number.

5

It is mandatory to enter the "Goods Ready By Date". (= earliest Pick up Date and Time)

6

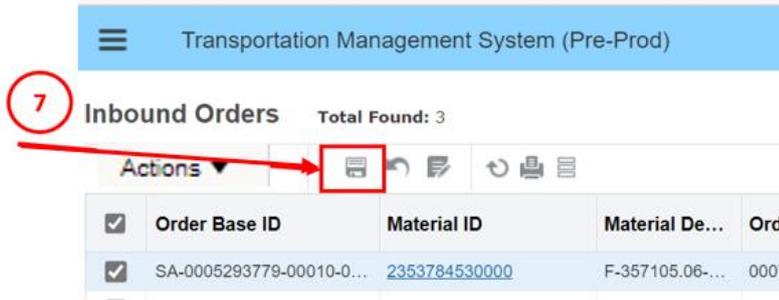
In case the location (where the goods are need to be picked up) is not correct you can change it here.

In case you need to enter your Reference Number at a later time, because your delivery note is created at a later time, you need to inform Schaeffler.

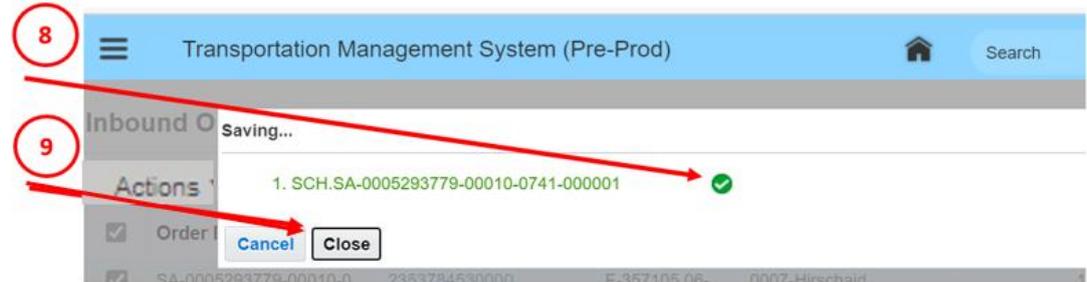
Send Email to:

or-hza-otm-transport@schaeffler.com with the related order release number 2024...

To save the entries/changes click on Disk symbol.



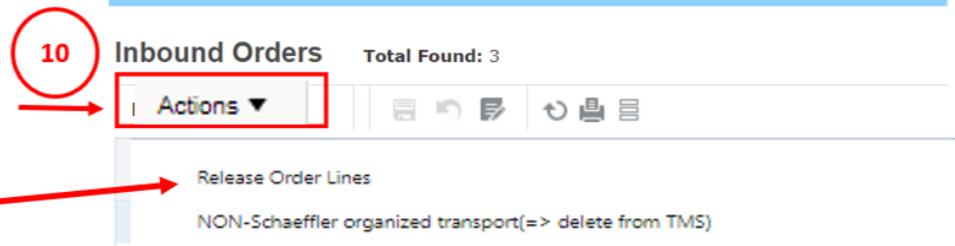
Next you get this message. Wait until it is green.



Then click on "Close".

Click on the button "Actions"

And then click on "Release Order Lines"



Click on "Finished" **11**

Release Lines ☆ 1 of 1 Finished

Line Item

Total Package Count
12000

12 Results

The demand was released successfully

NEXT Part:
2 Transport Details

Success

You successfully modified the following records:

SCH.SA-0005293779-00010-0741-000001 View

Modify Another

By "Release Order Lines" you release the demand data you entered/changed and TMS will check in the background if demands can be consolidated.

Example: If you release more than one demand for the same Schaeffler plant, same Goods Ready By Date and same Delivery Date, then TMS will combine them into one Transport demand (=Order Release is the name of the object in TMS).

Additionally TMS will also calculate the Handling Units (also called Ship Units). The calculation of Handling Units is based on packaging instructions. Aim is to propose realistic Handling Unit Data.

4.1.1 Detailed Explanation how to enter/change data

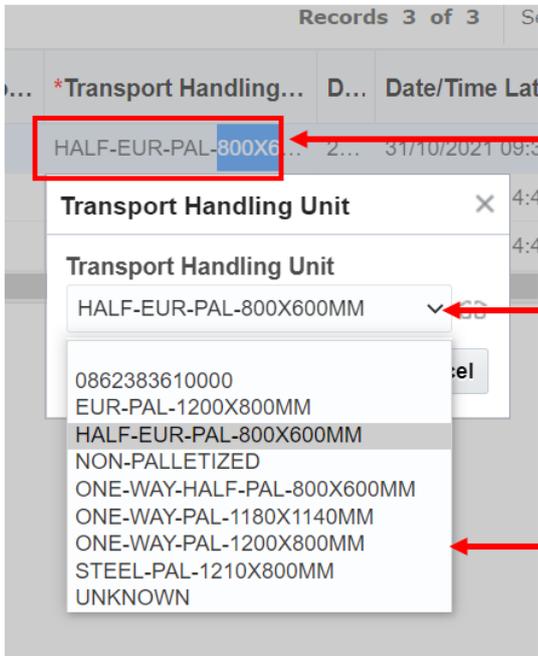
4.1.1.1 How to enter/ change Transport Handling Unit

For each Material ID packaging instructions are uploaded to TMS, which define the Transport Handling Unit.

When you use a different THU, please change it.

In case the THU which is shown in TMS is generally wrong, please contact Schaeffler TMS-Team. Contact: OR-HZA-OTM-Transport@schaeffler.com so it can be corrected.

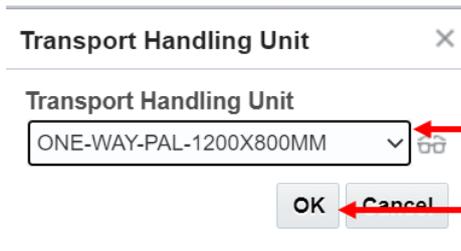
If you want to send the Goods as “Parcel (CEP)” you need to change the THU to “NON-PALLETIZED”.
Here you see how it is changed.



Double Click to edit
“Transport Handling Unit”.

Click on  to open drop-down menu

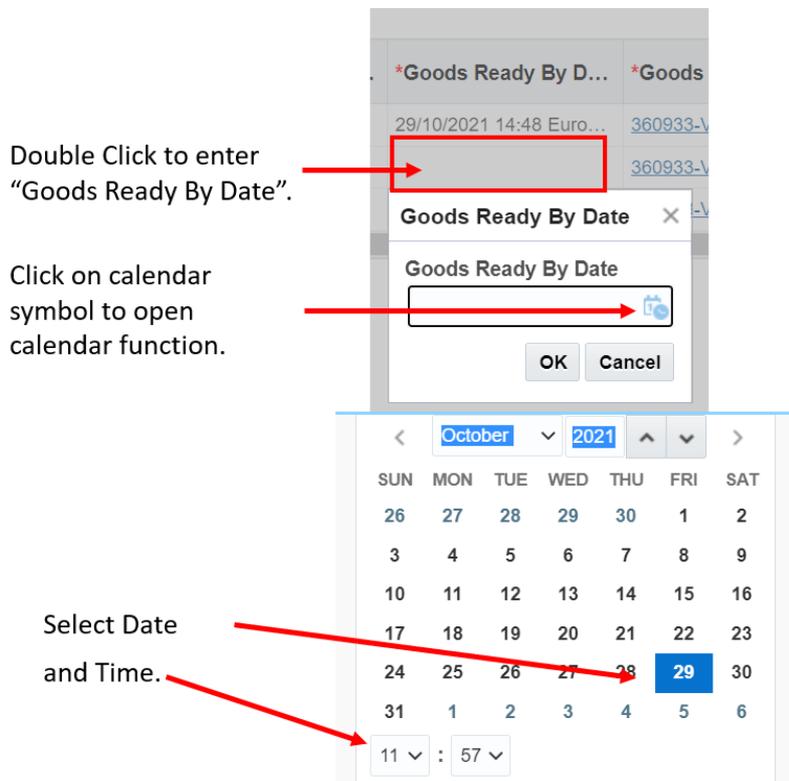
and select the correct THU.



The new THU is there.

Click on “OK” to save the change.

4.1.1.2 How to enter Goods Ready By Date



It is important that you enter a feasible "Goods Ready By Date". Feasible means: you need to take into account the requested delivery date, the transport transit time and the time for planning and ordering a transport. It has to be realistic to execute the transport in time.

That is why you need to confirm at least one day before pick-up until 11 o'clock latest.

The TMS supports you here because it shows you the "Latest Possible Goods Ready by Date"

Latest Possible Goods Ready by Date
24/03/2022 09:00 CET

In this example you have to release and confirm a transport on 23.03.2022 until 11 o'clock, with "Goods Ready By Date" = 24.03.2022.

But it is preferred that you confirm an order as early as possible and to give the "Goods Ready By Date" as much in advance as possible.

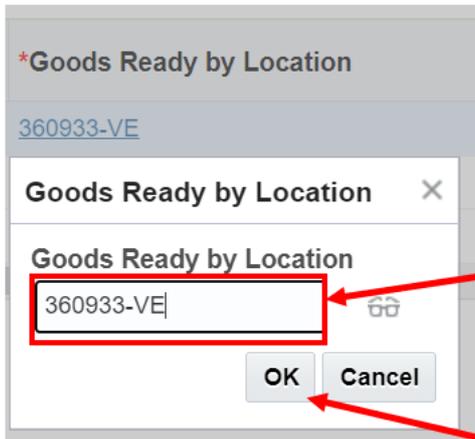
Based on the country and postal code where the ship from location of a supplier is located and based on the receiving Schaeffler destination, the TMS will show you the "Latest Possible Goods Ready by Date". Only then it is feasible that the transport will arrive on time.

4.1.1.3 How to enter Goods Ready by Location

The correct “Goods Ready by Location” is very important for the TMS. Because the Logistics Service Provider (LSP) will be sent to the “Goods Ready by Location” to pick up the goods. So in case the goods are at a different location where they need to be picked up, you need to change the “Goods Ready by Location”.

Pre-Requisite: The new “Goods Ready by Location” needs to be in TMS as master data. If it is missing in TMS, please contact Schaeffler TMS-Team.

Contact: OR-HZA-OTM-Transport@schaeffler.com



Double Click to edit “Goods Ready by Location”

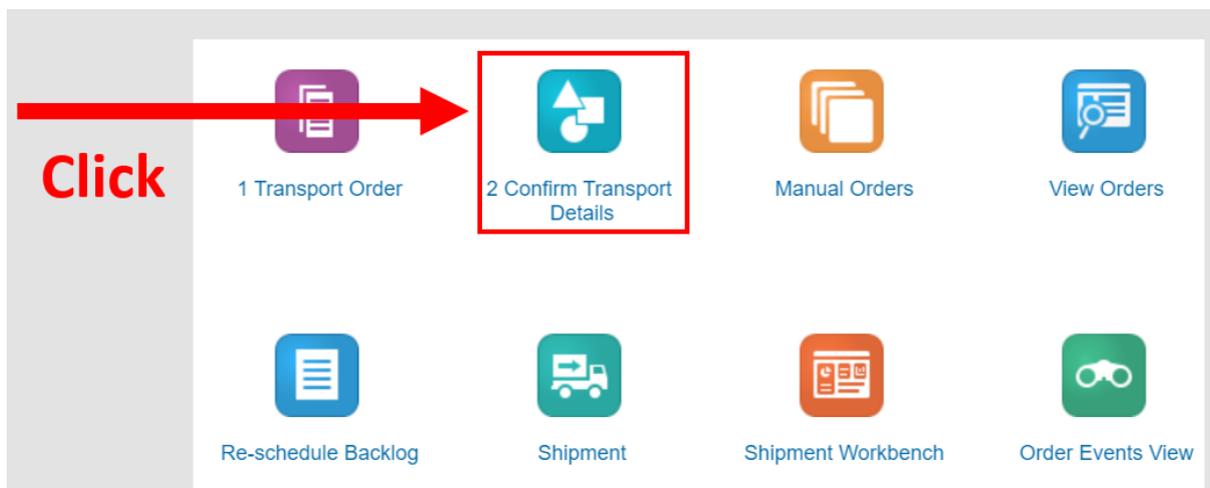
Then you can enter the correct “Goods Ready by Location”

Save the change by click on “OK”

4.2 Standard Process Part 2: 2 Confirm Transport Details

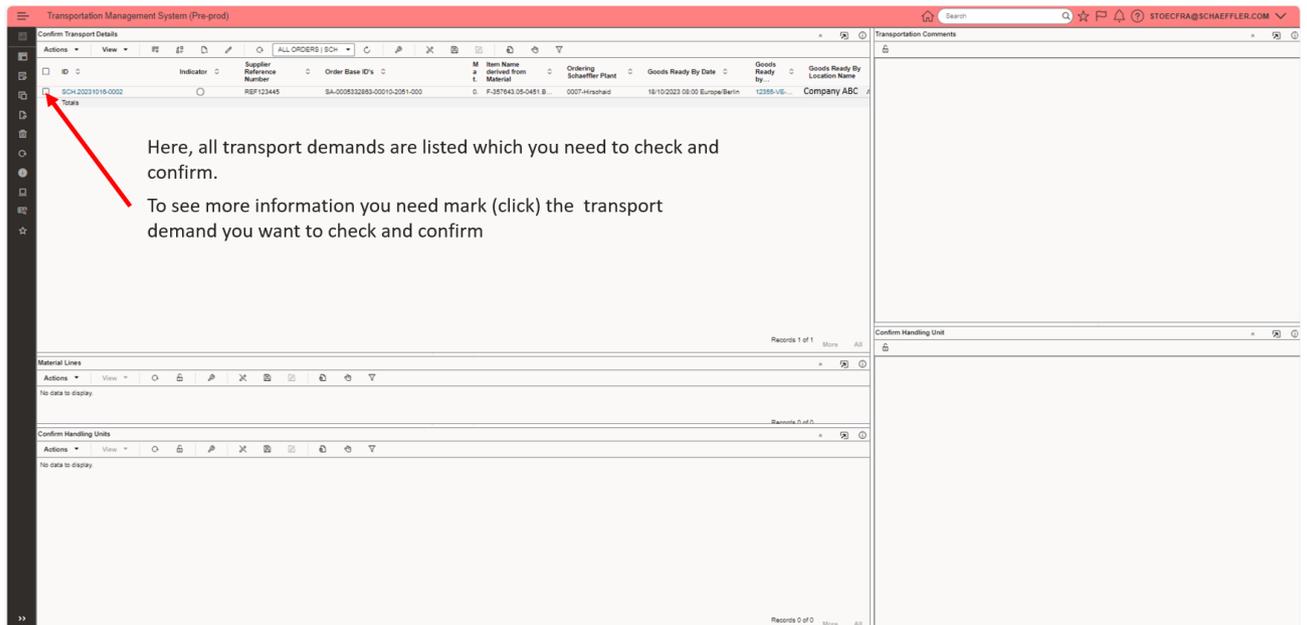
After releasing the transport data in Part 1: 1 Transport Order, now you need to do the second part and open “2 Confirm Transport Details” to do the final step to confirm the Transport Details so that the transport demand can be planned.

How to start: Click on “2 Confirm Transport Details”.

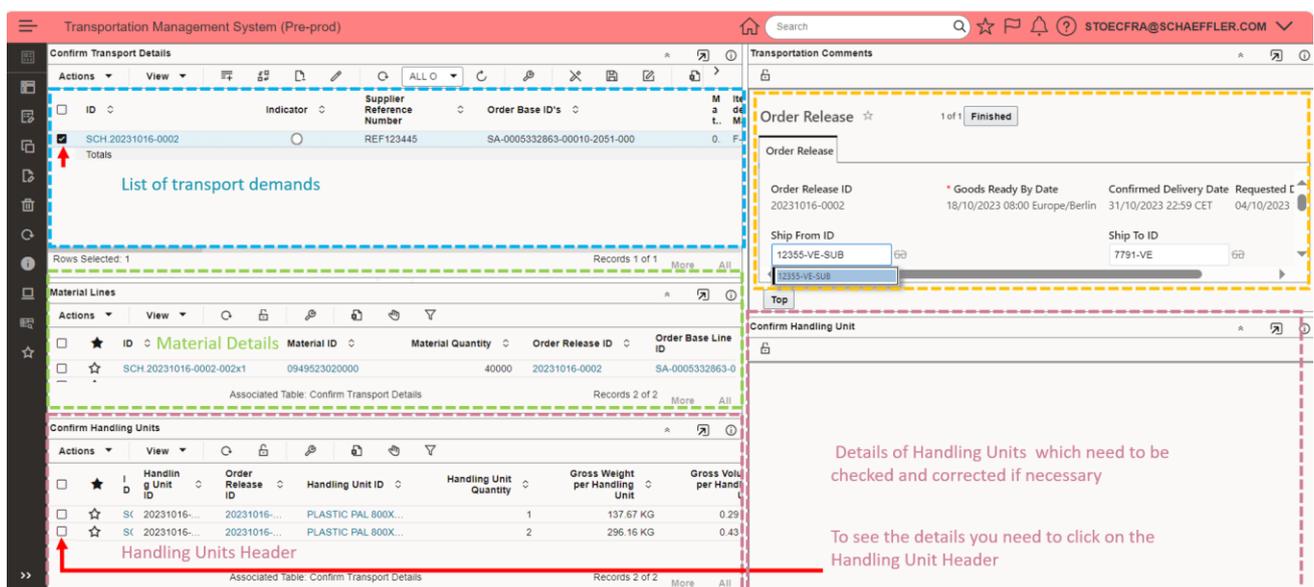


You see all the transport demands you have released in “1 Transport Order” which need to be checked and confirmed now, and where documents need to be uploaded.

This screen is called a workbench in TMS and you see that this screen has different sections.



When you mark the transport demand you see additional information in the different sections of the screen. To better explain the different sections they are highlighted in different colours.



Now you can see the details to the Handling Unit line you marked on the left.

By placing the cursor in between the sections you can enlarge or shrink the sections to be able to see all the information and adapt the screen to your needs.

Another option is to enlarge a section by click on this symbol.

Here you can see the Handling Units details when you enlarge this section.

ID	Material ID	Material Description	Material Quantity	Item Name derived from Material
20231016-0002-001	0949523020000	F-357643.05-0451.BZ.VVTACTD		9000 F-357643.05-0451.BZ.VVTACTD



With click on  you decrease this section.

Explanation of the different sections

1. Top left section

Header Section A lists all the relevant information of the (consolidated) transport demand(s). This (consolidated) transport demand is called an “Order Release (OR)” in TMS.

ID	Indicator	Supplier Reference Number	Order Base ID's	Material ID	Material Description	Goods Ready By Date	Goods Ready by Location	Goods Ready By Delivery Date	Incoterm ID	Incoterm Location	Ship To	Ship To Name
SCH-20211031-0001		TEST REF NO. 123	SA-0005293779-00010-0741-000	2353784530000	F-357105.06-0670.DL.N...	29/10/2021 14:48 Europ	360933-VE	R. 03/11/2021 23:59 Eur...	EXW	DEGGINGEN	7791-VE	SPEDITION PFLAUM

List of transport demands

ID is generated by TMS based on the actual date you release a demand in Part 1 “Transport Order”.

This is the Reference No. you entered in Part 1 “Transport Order”.

This is the original ID from Schaeffler SAP. In case you released more than one demand in Part 1 “Transport Order” and these could be consolidated, then you see all the ID’s here.

This is the Date when the goods are ready for pick-up which you entered in Part 1 “Transport Order”.

1. Top right Section “Order Release”

Shows additional information and has the option (not mandatory) to enter additional information.

Transportation Comments

Order Release ☆

1 of 1 **Finished**

Header Section B

Order Release ID: 20211031-0001

* Goods Ready By Date: 29/10/2021 14:48 Europe/Berlin

Delivery Date: 03/11/2021 23:59 Europe/Berlin

Ship From ID: 360933-VE

Ship From Name: TEST SUPPLIER COMPANY GMBH & CO.

* Incoterms: EXW

Ship To ID: 7791-VE

Ship To Name: SPEDITION PFLAUM

Incoterm Location: DEGGINGEN

Pick-up Instructions or Restrictions

Supplier Additional Comments

Premium Freight Number

Total Weight: 1496.79 KG

Total Volume: 0.22 CUMTR

Total Handling Unit Quantity: 3.00

Total Package Quantity: 7650.00

Total Packaging Unit Quantity: 102.00

Top

In case you entered additional information you need to click on "Finished" to save the data

Option to enter additional information which is transport relevant.
Example: "Only side loading possible."

Option to enter additional comments which are transport relevant.

Option to enter PFR Number. (Exception case)

2. Material Section
Information on material level.

Material Lines

Material Section

ID	Material ID	Total Package Count	Order Release ID	Order Base Line ID	Ship Unit ID	Packaging Unit Count	Domain Name
★ SCH.20211031-0001-001x1	2353784530000	7,650	20211031-0001	SA-0005293779-00010-0741...	20211031-0001-001	80	SCH

Rows Selected: 1

Associated Master Table: Confirm Transport Details | Records

Material Quantity: 7650 pieces as released in Part 1 Transport Order

3. Handling Unit Section (Confirm Handling Units)
Shows the Handling Units which were calculated by TMS based on material number and the relevant packaging instructions.
It is very important that you check the Handling Unit information because based on this data the transport is planned.

Confirm Handling Units											
Actions		View									
ID Handling Unit ID	Order Release ID	Transport Handling Unit	Handling Unit Quantity	Gross Weight per Handling Unit	Gross Volume per Handling Unit	Length per Handling Unit	Width per Handling Unit	Height per Handling Unit	Total Gross Weight	Total Gross Volume	Domain Name
S_20211031-0001-001	20211031-0001	HALF-EUR-PAL-800X600MM	2	585.30 KG	0.07 CUMTR	800 MM	600 MM	150 MM	1,170.60 KG	0.14 CUMTR	CH
S_20211031-0001-002	20211031-0001	HALF-EUR-PAL-800X600MM	1	326.19 KG	0.07 CUMTR	800 MM	600 MM	150 MM	326.19 KG	0.07 CUMTR	CH

To Do: You need to check if the data are correct.

4. How to check the Handling Units and how to correct the data

If the Handling Unit data is not correct you need to change the wrong data in Handling Unit Section B. Also you need to check the "Stackability Factor" in Handling Unit Section B. It is important that you change the stackability factor if it is not correct. Stackability factor = 1-0 (not stackable), 1-1 means you can stack one on top, 1-2 means you can stack two on top, etc.

1 First you mark the line where you want to check or change data. For this line you see the detailed data in Handling Unit Section B.

2 If the data is not correct you need to change it in Section B. The fields/entries you can change are marked in "red".

3 Also you need to check the "Stackability Factor".

4

5 If you changed data you need to click on "Finished" to save the data.

In chapter 4.2.1.1 is described how Length, Width, Height per THU, Total Gross Weight and THU Quantity can be changed.

In chapter 4.2.1.2 is described how Transport Handling Unit can be changed.

In chapter 4.2.1.3 is described how Stackability Factor can be changed.

5. Important: Upload of documents: (delivery note, invoice..)

To share documents with other parties which are connected to the transport (Schaeffler, LSP, customs broker..) you need to upload them to TMS

1. Actions

2. Documents

3. Upload Document

Upload Document

*** Document File**

Choose Files No file chosen

Content Management System

DATABASE ▾

Upload

Click on “Choose Files” to open your explorer.



Now choose the document you want to upload. And click on “open”.

Upload Document

*** Document File**

Choose Files No file chosen

Content Management System

DATABASE ▾

Upload

Now click on upload and the documents are uploaded.
In the next step you need to select the document type. That way the TMS knows which documents were uploaded.

https://otmgtm-test-a611142.otm.em2.oraclecloud.com/GC3/glog.webserver.finder.WindowOpenFrame... Help

Documents Upload Successful

You have successfully uploaded the following documents:

Document ID	File Name	View Content	Document Type
SCH.TESTDOCUMENT DELIVERY-001	Testdocument Delivery.docx	<input type="button" value="View Content"/>	<input type="text" value=""/>
SCH.TESTDOCUMENT EXPORT DECLARATION-001	Testdocument export declaration.docx	<input type="button" value="View Content"/>	<input type="text" value=""/>
SCH.TESTDOCUMENT OTM COMMERCIAL INVOICE-001	Testdocument OTM commercial invoice.docx	<input type="button" value="View Content"/>	<input type="text" value=""/>
SCH.TESTDOCUMENT OTM LOADING LIST-001	Testdocument OTM loading list.docx	<input type="button" value="View Content"/>	<input type="text" value=""/>

1

2

COMMERICAL_INVOICE

WEBSERVICE_OIC
PREFERENTIAL_COO
RAIL_HBL
RAIL_MBL
IMPORT_DOCUMENT
OTHERS
PACKING_LISTS
CERTIFICATES_OF_ORIGIN
AIR_HAWB
SOLAS_VGM
SEA_MBL
PS_WEBSERVICE
TENDER_WEBSERVICE
SEA_HBL
AIR_MAWB
POD_DOC

After all documents are uploaded and document type was selected. You need to click on "Submit"

Documents Upload Successful

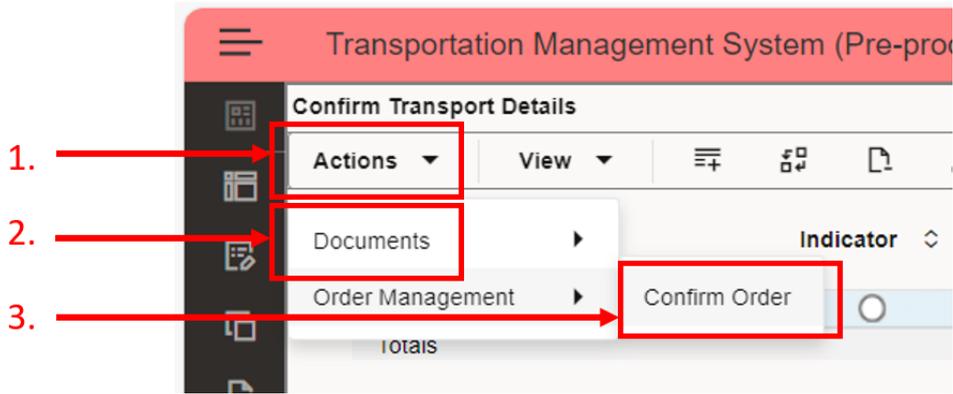
You have successfully uploaded the following documents:

Document ID	File Name	View Content	Document Type
SCH.TESTDOCUMENT DELIVERY-001	Testdocument Delivery.docx	<input type="button" value="View Content"/>	DELIVERY_NOTE
SCH.TESTDOCUMENT EXPORT DECLARATION-001	Testdocument export declaration.docx	<input type="button" value="View Content"/>	EXPORT_DECLARATION
SCH.TESTDOCUMENT OTM COMMERCIAL INVOICE-001	Testdocument OTM commercial invoice.docx	<input type="button" value="View Content"/>	COMMERCIAL_INVOICE
SCH.TESTDOCUMENT OTM LOADING LIST-001	Testdocument OTM loading list.docx	<input type="button" value="View Content"/>	PACKING_LISTS

Now all your uploaded documents are uploaded.

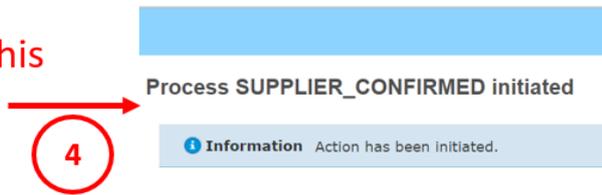
If you have checked everything and uploaded the documents you need to do the final step:

Confirm



If the data is correct you need to confirm the transport demand.

4. You get this message



This was the final step. The confirmed order is now ready to be planned by Schaeffler Transport Managers

The transport demand you just confirmed will be no longer visible in “2 Confirm Transport Details”

after you click on .

4.2.1 Detailed Explanation how to enter/change data

4.2.1.1 How to change Length per HU, Total Gross Weight, Width per HU, THU Quantity and Height per THU

Here you see now the changed entry. To save it you need to click on "Finished" here also.

Confirm Handling Unit Handling Unit Section B

1 of 1 **Finished**

Handling Units ☆

Handling Units

* Handling Unit ID
20211031-0001-001

* Transport Handling Unit
EUR-PAL-1200X800MM

* Transport Handling Unit Quantity
2 Change to 1

* Total Gross Weight
1170.60 KG

Total Gross Volume
0.14 CUMTR

* Length per Handling Unit Change to 1200
800 MM

* Width per Handling Unit Change to 800
600 MM

* Height per Handling Unit Change to the actual height 450
150 MM

* Stackability Factor

Attention: When you change the THU you need check if it is necessary to adjust other fields as well.

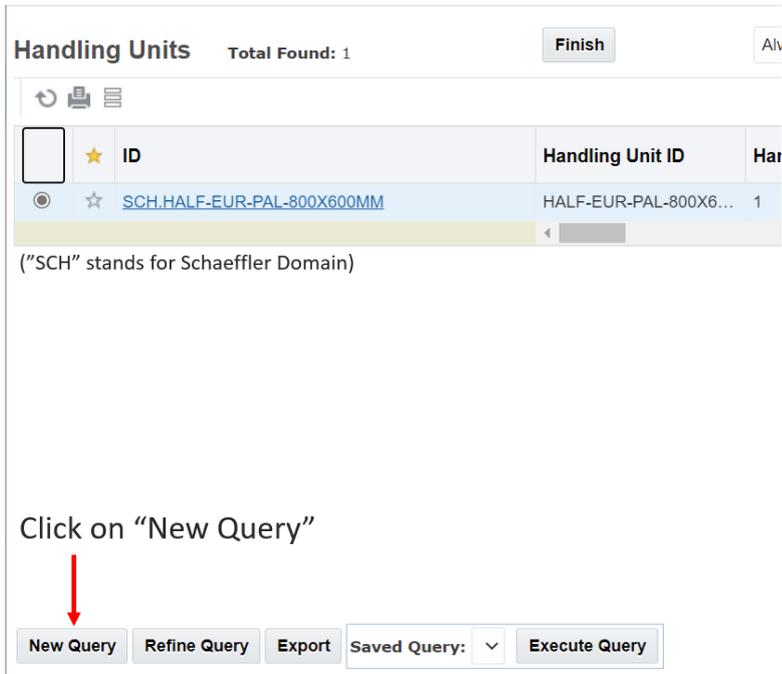
In this example it is necessary to change Length, Width, Height and THU Quantity and then click on "Finished" to save the changes.

4.2.1.2 How to change Transport Handling Unit

Transport Handling Unit

HALF-EUR-PAL-800X600

To change the Transport Handling Unit click on .
This window opens up and lists the actual Transport Handling Unit.



Handling Units Total Found: 1 Finish Alv

ID	Handling Unit ID	Har
SCH.HALF-EUR-PAL-800X600MM	HALF-EUR-PAL-800X6...	1

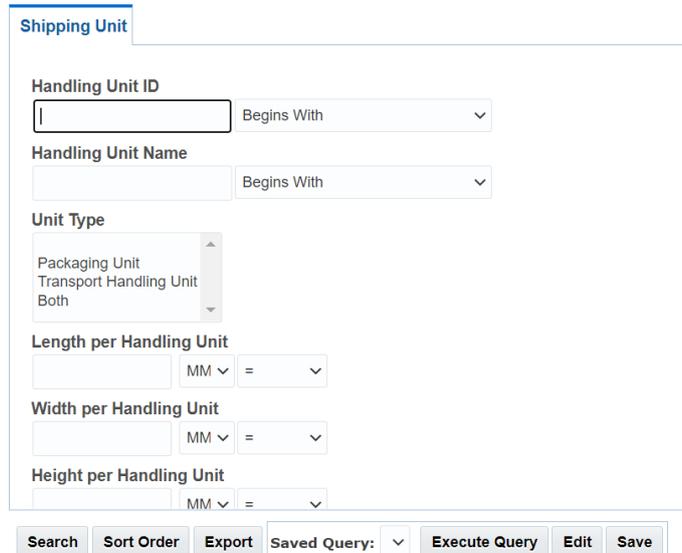
("SCH" stands for Schaeffler Domain)

Click on "New Query"

New Query Refine Query Export Saved Query: Execute Query

Then this window is opened.

Handling Units Finder



Shipping Unit

Handling Unit ID Begins With

Handling Unit Name Begins With

Unit Type
Packaging Unit
Transport Handling Unit
Both

Length per Handling Unit MM =

Width per Handling Unit MM =

Height per Handling Unit MM =

Search Sort Order Export Saved Query: Execute Query Edit Save

Now this search screen is opened.

Handling Units Finder

Shipping Unit

Handling Unit ID Begins With ▼

Handling Unit Name Begins With ▼

Unit Type
 Packaging Unit
 Transport Handling Unit
 Both

Length per Handling Unit MM ▼ = ▼

Width per Handling Unit MM ▼ = ▼

Height per Handling Unit MM ▼ = ▼

Search Sort Order Export Saved Query: ▼ Execute Query Edit Save

By making an entry in one of the fields you can limit the search. For example if you enter "800" into the field "Length per HU", then the search will only show HU's with the length of 800 MM.

Click on "Search".

If you make no entry to limit the search and you click on "Search" then all available Transport Handling Units are shown.

Here you need to select the correct Transport Handling Unit and then save it by clicking on "Finish".

Handling Units Total Found: 21

2. Save ➔ Finish

ID	Handling Unit ID	Handling Unit Name	Length per Handlin...	Width per Handling ...	Height per Handling...	Diameter
☆ SCH.UNKNOWN	UNKNOWN					
☆ SCH.NON-PALLETIZED	NON-PALLETIZED	NON-PALLET				
☆ SCH.PLASTIC PAL 800X600	PLASTIC PAL 800X600		800.000 MM	600.000 MM	145.000 MM	
☆ SCH.ONE WAY PAL SONDER 900X600	ONE WAY PAL SONDE...		908.000 MM	664.000 MM	514.000 MM	
☆ SCH.WOOD PAL 1200X1000	WOOD PAL 1200X1000		1.200.000 MM	1.000.000 MM	140.000 MM	
☆ SCH.WOOD EURO PAL 1000X600	WOOD EURO PAL 100...		1.000.000 MM	600.000 MM	145.000 MM	
☆ SCH.WOOD EURO PAL 1200X800	WOOD EURO PAL 120...		1.200.000 MM	800.000 MM	144.000 MM	
☆ SCH.GITTERBOX-HALF 1240X932	GITTERBOX-HALF 12...		1.240.000 MM	840.000 MM	500.000 MM	
☆ SCH.ONE WAY PAL 1180X1140	ONE WAY PAL 1180X1...		1.180.000 MM	1.140.000 MM	150.000 MM	
☆ SCH.ONE WAY PAL 1200X800	ONE WAY PAL 1200X800		1.200.000 MM	800.000 MM	140.000 MM	
☆ SCH.ONE WAY PAL 1140X980	ONE WAY PAL 1140X980		1.140.000 MM	980.000 MM	126.000 MM	
⊙ ☆ SCH.ONE WAY PAL 800X600	ONE WAY PAL 800X600		800.000 MM	600.000 MM	130.000 MM	
☆ SCH.ONE WAY PAL SPECIAL 900X600	ONE WAY PAL SPECI...		908.000 MM	664.000 MM	514.000 MM	
☆ SCH.PLASTIC PAL 1200X1000	PLASTIC PAL 1200X10...		1.200.000 MM	1.000.000 MM	160.000 MM	
☆ SCH.PLASTIC PAL 1200X800	PLASTIC PAL 1200X800		1.200.000 MM	800.000 MM	160.000 MM	
☆ SCH.STEEL PAL 1200X1000	STEEL PAL 1200X1000		1.200.000 MM	1.000.000 MM	160.000 MM	
☆ SCH.STEEL PAL 1000X800	STEEL PAL 1000X800		1.008.000 MM	808.000 MM	160.000 MM	
☆ SCH.STEEL PAL 1200X800	STEEL PAL 1200X800		1.200.000 MM	800.000 MM	140.000 MM	
☆ SCH.WOOD POOL PAL 1000X600	WOOD POOL PAL 100...		1.000.000 MM	600.000 MM	145.000 MM	
☆ SCH.WOOD POOL PAL 1200X800	WOOD POOL PAL 120...		1.200.000 MM	800.000 MM	144.000 MM	
☆ SCH.WOOD POOL PAL 1200X1000	WOOD POOL PAL 120...		1.200.000 MM	1.000.000 MM	140.000 MM	

1. Select ➔

Here you see now the changed entry. To save it you need to click on "Finished" here also.

The screenshot shows a software interface for handling units. At the top, there is a header "Confirm Handling Unit" and "Handling Unit Section B". Below this, there is a "Handling Units" section with a star icon. A "1 of 1 Finished" button is highlighted with a red box and a red arrow. The main area contains several fields: "Handling Unit ID" (20211031-0001-001), "Transport Handling Unit" (WOOD EURO PAL 1200X800), "Transport Handling Unit Quantity" (2), "Total Gross Weight" (1170.60 KG), "Total Gross Volume" (0.14 CUMTR), "Length per Handling Unit" (800 MM), "Width per Handling Unit" (600 MM), and "Height per Handling Unit" (150 MM). Red boxes highlight the "Finished" button, the "Transport Handling Unit" field, the "Transport Handling Unit Quantity" field, and the "Length per Handling Unit", "Width per Handling Unit", and "Height per Handling Unit" fields. A green arrow points from the text above to the "Finished" button. Text annotations include "Change to 1200" next to the length field, "Change to 800" next to the width field, "Change to 1" next to the quantity field, and "Change to the actual height 450" next to the height field.

Attention: When you change the THU you need check if it is necessary to adjust other fields as well.

In this example it is necessary to change Length, Width, Height and THU Quantity and then click on "Finished" to save the changes.

4.2.1.3 How to change Stackability Factor

Confirm Handling Unit

Handling Units ☆ 1 of 1 **Finished** ← If you changed data you need to click on "Finished" to save the changes.

Handling Units

* Handling Unit ID: 20211031-0001-001

* Transport Handling Unit: HALF-EUR-PAL-800X600

* Transport Handling Unit Quantity: 2

* Total Gross Weight: 1170.60 KG

Total Gross Volume: 0.14 CUMTR

* Length per Handling Unit: 800 MM

* Width per Handling Unit: 600 MM

* Height per Handling Unit: 150 MM

Stackability Factor: 1-0

Lines

ID	Material ID	Material Description	Material Quantity
20211031-0001-001	2353784530000	F-357105.06-0670.DL.NWDK-C01	6000

New Line Item

To change the "Stackability Factor" click on to open the drop-down menu.

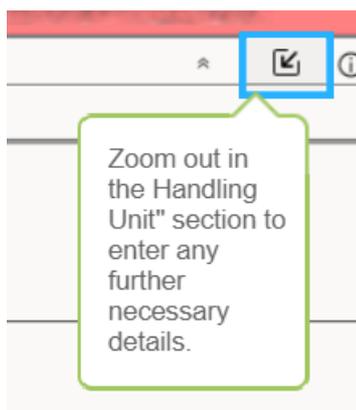
Stackability Factor

Select the correct "Stackability Factor" and click on "Finish" to save the change.

Explanation:

- 1-0 = nothing can be stacked on top
- 1-1 = one Handling Unit can be stacked on top
- 1-2 = 2 Handling Units can be stacked on top
- 1-3 = 3 Handling Units can be stacked on top

When you click on "Finished" the TMS checks if all mandatory fields are filled. If not, an error message is shown. Then you need to correct the data and click again "Finished" to save it.



5 How to send goods by Parcel (CEP)

In case you need to send a small quantity of goods where you do not need to put them on a pallet but want to send them in a parcel, you also follow the standard process as described in:

Chapter 4.1 Part 1: 1 Transport Order and

Chapter 4.2 Part 2: 2 Confirm Transport Details.

Only differences:

1 Transport Order

To send goods by parcel you need to change the Transport Handling to “NON-PALLETIZED”.

(Important: You need to respect the already known weight restrictions < 32 kg for parcel)

This you do as part of the standard process in “1 Transport Order”.

The screenshot displays the SAP Transportation Management System (Pre-Prod) interface. The main area shows a table of Inbound Orders with the following columns: Release Order Lines, Material, Quantity Ordered, Already Released Quantity, Quantity to be Shipped, Transport Handling Unit, Supplier Reference Number, and Goods Ready By Date. The table contains three rows of data for material 'schald'. The second row is selected, and its checkbox is checked. Red and green boxes highlight specific columns, with numbered callouts (1-5) pointing to them. Below the table, five numbered annotations provide instructions for each highlighted column.

Release Order Lines	Material	Quantity Ordered	Already Released Quantity	Quantity to be Shipped	Transport Handling Unit	Supplier Reference Number	Goods Ready By Date
<input type="checkbox"/>	schald	12000	4350	7 50	HALF-EUR-PAL-800X600MM	TEST REF NO. 123	29/10/2021 14:48 Europe/Berlin
<input checked="" type="checkbox"/>	schald	12000		12 00	HALF-EUR-PAL-800X600MM		
<input type="checkbox"/>	schald	12000		12 00	HALF-EUR-PAL-800X600MM		

- Select the demand you want to ship by clicking on the square.
- This is the quantity you have to ship. The quantity is pre-populated with the ordered quantity. Only in exceptional cases when you cannot deliver the requested quantity in full and it is agreed with Schaeffler Material Planner you adjust the quantity
- Here you see the Transport Handling Unit the TMS has defined based on packaging instructions. If this is not correct you need to change this entry. In case of “Parcel” you have to change it to “NON-PALLETIZED”.
- We recommend you enter your own reference number. That way you can search in TMS with your own number.
- It is mandatory to enter the “Goods Ready By Date” . (= earliest Pick up Date and Time)

2 Confirm Transport Details

Now it is also necessary to enter the correct length, width and height of the parcel by overwriting the entries for length, width and height.

(If the Total Gross Weight is wrong, overwrite it with the correct weight)

This you do as part of the standard process in “2 Confirm Transport Details”.

Confirm Handling Unit

1 of 1 **Finished** ← To save the changes click on “Finished”

Handling Units ☆

Handling Units

Handling Unit ID
20210915-0006-001

* Handling Unit
NON-PALLETIZED

* Handling Unit Quantity
1

* Total Gross Weight
15.00 KG

Total Gross Volume
0.00 CUMTR

* Length per Handling Unit
450 MM

* Width per Handling Unit
280 MM

* Height per Handling Unit
320 MM

* Stackability Factor
1-0

Lines

ID	Material ID	Material Description	Material Quantity
20210915-0006-001	0953958060000	N/A	10

New Line Item

Save the changes by click on “Finished” and then confirm as described in chapter 4.2.

After confirmation the transport demand will be planned and an OTM-Shipment is created.

The change of the Transport Handling Unit to “NON-PALLETIZED” will determine that the TMS will select a Logistics Service Provider (LSP) who is doing CEP like UPS, DHL, TNT....

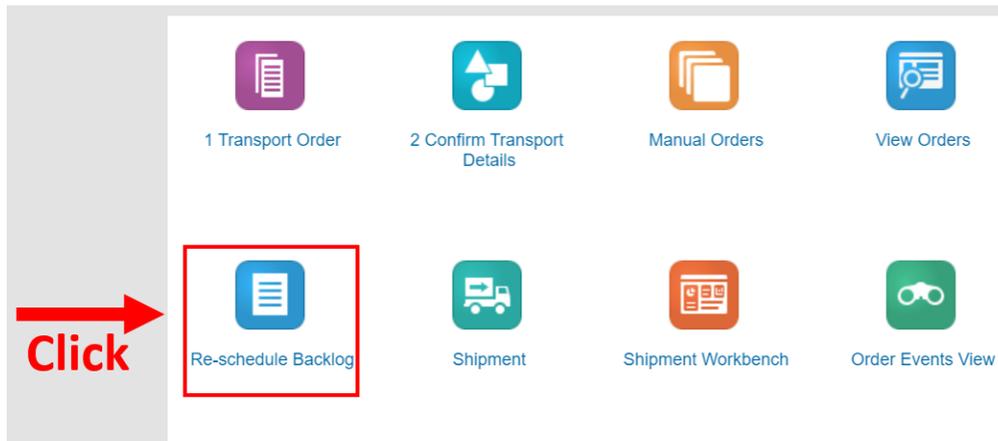
After TMS has selected the LSP you will receive an Email which will tell you all the transport relevant data and will give you the link to the Schaeffler Portal where you need to enter the necessary information to get your packaging labels. This is the same process as you do today.

6 Exception Process: Re-schedule Backlog

In exceptional situations when you cannot deliver a requested material quantity on time you get into backlog.

We expect you to inform your Schaeffler Material Planner about such a situation, as you are doing already. In case the Schaeffler Material Planner sends an update with a new delivery date and/or new quantity then you follow the standard process described in chapter 4.1 “1 Transport Order” and chapter 4.2 “2 Confirm Transport Details”.

If the demand is not updated and the delivery date is in the past or no longer feasible, the demand is no longer visible in “1 Transport Order” but is visible in “Re-schedule Backlog”.



To adjust a delivery (Pre-requisite: You are aligned on the new delivery date with the responsible material planner at Schaeffler) you click on:



You see all your demands -> Order Base ID, Material ID ...where the delivery date is in the past or it is no longer possible to transport the demand in time to meet the requested delivery time. (Reason: The standard transport transit time from your location to Schaeffler is longer then time between the current date and the requested delivery date.)

You select the demand (Order Base ID) and adjust the delivery date.

Re-schedule Backlog Total Found: 3

<input checked="" type="checkbox"/>	nce ...	Goods Ready By Date	Goods Ready by Lo...	Goods Ready By Lo...	*Confirmed Delivery Date	Requested Delivery Date	Ship To
<input type="checkbox"/>	1103	03/11/2021 12:02 Euro...	360933-VE	RÜSTER PRÄZISIONS...	05/11/2021 23:59 Europe/Berlin	05/11/2021 00:00 Europe/Berlin	7791-VE
<input checked="" type="checkbox"/>			360933-VE	RÜSTER PRÄZISIONS...	02/11/2021 23:59 Europe/Berlin	02/11/2021 14:46 Europe/Berlin	7791-VE
<input type="checkbox"/>			360933-VE	RÜSTER PRÄZISIONS...	29/10/2021 23:59 Europe/Berlin	29/10/2021 14:46 Europe/Berlin	7791-VE

1. You select the demand by click on the and scroll to the right.

The Confirmed Delivery Date has a * which indicates that you can change it.

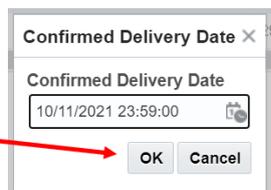
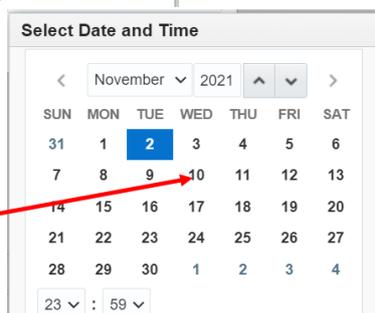
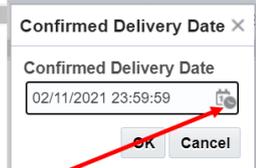
2. You need to make a double click on the date you want to change.

3. Double click on the calendar symbol to open the calendar.

4. Now you select/click on the new date you agreed with Schaeffler material planner.

5. Confirm the new date with click on "OK".

Now the Confirmed Delivery Date is changed.



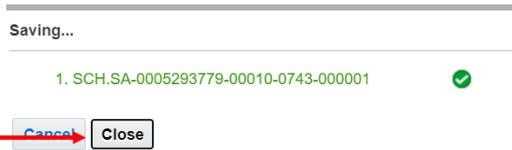
Re-schedule Backlog Total Found: 3

<input checked="" type="checkbox"/>	nce ...	Goods Ready By Date	Goods Ready by Lo...	Goods Ready By Lo...	*Confirmed Delivery Date	Requested Delivery Date	Ship
<input type="checkbox"/>	1103	03/11/2021 12:02 Euro...	360933-VE	RÜSTER PRÄZISIONS...	05/11/2021 23:59 Europe/Berlin	05/11/2021 00:00 Europe/Berlin	7791-
<input checked="" type="checkbox"/>			360933-VE	RÜSTER PRÄZISIONS...	10/11/2021 23:59:00 Europe/...	02/11/2021 14:46 Europe/Berlin	7791-
<input type="checkbox"/>			360933-VE	RÜSTER PRÄZISIONS...	29/10/2021 23:59 Europe/Berlin	29/10/2021 14:46 Europe/Berlin	7791-

6. Now you need to save the change by click on the disk symbol.

7. You get this message that it is saving. You need to wait until it is "green".

Then click on "Close".

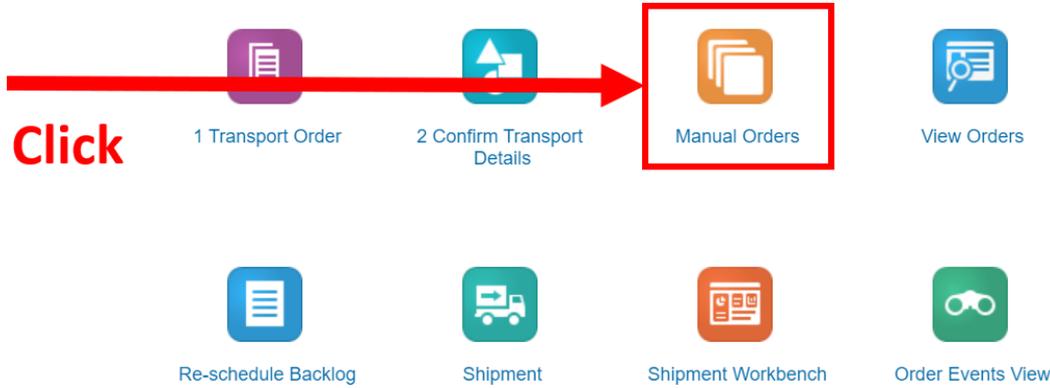


Now you have changed the delivery date to 10.11.2021 for this demand and you can continue with the Standard process Part 1: "1 Transport Order" and Part 2: "2 Confirm Transport Details".

7 Exception Process: Manual Orders

In very exceptional cases, where no demand can be generated in Schaeffler SAP, but goods need to be transported to Schaeffler, it is possible to generate a so called “Manual Order” for transportation.

1. Click on “Manual Orders”.



2. A second level opens up. Click on “Create Transport Order”.



Here you see one line for each Schaeffler Plant Code and the possible Ship to Location ID. The Material ID is always “UNKNOWN”. The Material Description is the field where you enter a description. This is a mandatory field.

ID	Material ID	Item Name derived from Material	*Material Quantity	*Supplier Reference ...	*Goods Read...	*Goods Ready By Date	*Delivery Date	Plant Code	Ship to Location ID	Shi
<input type="checkbox"/>	SCH... UNKNOWN	MANDATORY	0		360933-VE	F		0007-Hirschaid	7791-VE	SPE
<input type="checkbox"/>	SCH... UNKNOWN	MANDATORY	0		360933-VE	F		0007-Hirschaid	0007-PL	SCH
<input type="checkbox"/>	SCH... UNKNOWN	MANDATORY	0		360933-VE	F		0072-Höchstadt	7791-VE	SPE

Confirm Material to Ship Total Found: 3

ID	Material ID	Item Name derived from Material	Material Quantity	Supplier Reference ...	Goods Read...	Goods Ready By Date	Delivery Date	Plant Code	Ship to Location ID	Shi
<input checked="" type="checkbox"/>	SCH...	UNKNOWN	MANDATORY	360933-VE	F			0007-Hirschaid	7791-VE	SPE
<input type="checkbox"/>	SCH...	UNKNOWN	MANDATORY	360933-VE	F			0007-Hirschaid	0007-PL	SCH
<input type="checkbox"/>	SCH...	UNKNOWN	MANDATORY	360933-VE	F			0072-Höchststadt	7791-VE	SPE

1. You select the line based on "Plant Code" and "Ship to Location ID".

2. Double Click in field "Mandatory".

3. Window "Material Description" opens. Enter a description. Save by click on "OK".

Confirm Material to Ship Total Found: 3

ID	Material ID	Item Name derived from Material	Material Quantity	Supplier Reference ...	Goods Read...	Goods Ready By Date	Delivery Date	Plant Code	Ship to Location ID
<input checked="" type="checkbox"/>	SCH...	UNKNOWN	SPECIAL PARTS	360933-VE	F			0007-Hirschaid	7791-VE
<input type="checkbox"/>	SCH...	UNKNOWN	MANDATORY	360933-VE	F			0007-Hirschaid	0007-PL
<input type="checkbox"/>	SCH...	UNKNOWN	MANDATORY	360933-VE	F			0072-Höchststadt	7791-VE

4. Double Click in field "Material Quantity" opens a separate window to enter the quantity.

5. Enter the quantity. Save by click on "OK".

Confirm Material to Ship Total Found: 3

ID	Material ID	Item Name derived from Material	Material Quantity	Supplier Reference ...	Goods Read...	Goods Ready By Date	Delivery Date	Plant Code	Ship to Location ID
<input checked="" type="checkbox"/>	SCH...	UNKNOWN	SPECIAL PARTS	360933-VE	F			0007-Hirschaid	7791-VE
<input type="checkbox"/>	SCH...	UNKNOWN	MANDATORY	360933-VE	F			0007-Hirschaid	0007-PL
<input type="checkbox"/>	SCH...	UNKNOWN	MANDATORY	360933-VE	F			0072-Höchststadt	7791-VE

6. Double Click in field "Supplier Reference Number" opens a separate window to enter your Reference Number.

7. Enter Reference Number. Save by click on "OK".

Transportation Management System (Pre-Prod) Search STOECFRA@SCHAEFFLER.COM

Confirm Material to Ship Total Found: 3 Always Open in New Window

ID	Material ID	Material Description	Material Quantity	Supplier Reference ...	Goods Ready by Location ID	Goods Ready By Date	Delivery Date	Plant Code	Ship to L
SCH...	UNKNOWN	SPECIAL PARTS	3	TEST DEL: 12345	360933-VE	F		0007-Hirschaid	7791-VE
SCH...	UNKNOWN	MANDATORY	0			F		0007-Hirschaid	0007-PL
SCH...	UNKNOWN	MANDATORY	0			F		0072-Höchstadt	7791-VE

Goods Ready by Location ID X

Goods Ready by Location ID

360933-VE

OK Cancel

8. In case the "Goods Ready by Location ID" is not correct, you can change it with Double Click in the field.

9. Here you can enter another Location ID. Save by click on "OK".

Transportation Management System (Pre-Prod) Search STOECFRA@SCHAEFFLER.COM

Confirm Material to Ship Total Found: 3 Always Open in New Window

ID	Material ID	Item Name derived from Material	Material Quant...	Supplier Reference...	Goods Ready by L...	Goods Ready By Date	Delivery Date	Plant Code
SCH...	UNKNOWN	SPECIAL PARTS	3	TEST DEL: 12345	360933-VE			0007-Hirschaid
SCH...	UNKNOWN	MANDATORY	0		360933-VE			0007-Hirschaid
SCH...	UNKNOWN	MANDATORY	0		360933-VE			0072-Höchstadt

Goods Ready By Date X

Goods Ready By Date

OK Cancel

10. Double Click in the field "Goods Ready By Date".

11. Click on "Calendar symbol" to open calendar function.

12. Select date. Adjust time if necessary.

Select Date and Time

November 2021

SUN	MON	TUE	WED	THU	FRI	SAT
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4

22 : 41

Goods Ready By Date X

Goods Ready By Date

09/11/2021 16:00:00

OK Cancel

13. Save by click on "OK".

Transportation Management System (Pre-Prod) Search STOECFRA@SCHAEFFLER.COM

Confirm Material to Ship Total Found: 3 Always Open in New Window

Release Material Quantity Records 3 of 3 Selected: 0

ID	Material ID	Item Name derived from Material	*Material Quant...	*Supplier Reference...	*Goods Ready by L...	*Goods Ready By Date	*Delivery Date	Plant Code
SCH...	UNKNOWN	SPECIAL PARTS	3	TEST DEL: 12345	360933-VE	F 09/11/2021 16:00:00		0007-Hirschald
SCH...	UNKNOWN	MANDATORY	0		360933-VE	F		-Hirschald
SCH...	UNKNOWN	MANDATORY	0		360933-VE	F		-Höchststadt

14. Double Click in the field "Delivery Date".

15. Click on "Calendar Symbol".

16. Select date. Adjust time if necessary.

Select Date and Time

November 2021

SUN	MON	TUE	WED	THU	FRI	SAT
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4

22 : 53

New Query Refine Query Export Saved Query: Execute Query

17. Save the entries by click on "Disk Symbol".

Transportation Management System (Pre-Prod) Search STOECFRA@SCHAEFFLER.COM

Confirm Material to Ship Total Found: 3 Always Open in New Window

Release Material Quantity Records 3 of 3 Selected: 0

ID	Material ID	Item Name derived from Material	*Material Quant...	*Supplier Reference...	*Goods Ready by L...	*Goods Ready By Date	*Delivery Date	Plant Code
SCH...	UNKNOWN	SPECIAL PARTS	3	TEST DEL: 12345	360933-VE	F 09/11/2021 16:00:00	10/11/2021 22:53:00	0007-Hirschald
SCH...	UNKNOWN	MANDATORY	0		360933-VE	F		0007-Hirschald
SCH...	UNKNOWN	MANDATORY	0		360933-VE	F		0072-Höchststadt

18. Separate window opens.

Saving...

1. SCH.MANUAL-360933-VE-01-001

Cancel Close

19. Wait until message gets green then click on "Close".

Saving...

1. SCH.MANUAL-360933-VE-01-001

Cancel Close

Only when text is green and you see the green circle with the white check mark then data was saved successfully.
To finish the first part of manual order entry (create manual order) you need to click on "Release Material Quantity".

20. You need to mark the line you want to save and then save the entries by click on "Disk Symbol".

Transportation Management System (Pre-Prod)

Confirm Material to Ship Total Found: 3

Release Material Quantity

ID	Material ID	Item Name derived from Material	*Material Quant...	*Supplier Reference...	*Goods Ready by L...	Goods Ready By Lo...	*Goods Ready By Date	*Delivery Date	
<input checked="" type="checkbox"/>	SCH...	UNKNOWN	SPECIAL PARTS	3	TEST DEL: 12345	360933-VE	RÜSTER PRÄZISIONS...	09/11/2021 16:00 Europe/...	10/11/2021 22:53 Europe/...
<input type="checkbox"/>	SCH...	UNKNOWN	MANDATORY	0		360933-VE	RÜSTER PRÄZISIONS...		
<input type="checkbox"/>	SCH...	UNKNOWN	MANDATORY	0		360933-VE	RÜSTER PRÄZISIONS...		

21. This window shows that the manual order was released.

This is the ID which was created by TMS. It contains the current date and a sequential number.

Release Orders - Geschäftlich - Microsoft Edge

https://otmgtm-test-a611142.otm.em2.oraclecloud.com/GC3/glog.webserver.finder.WindowOpenFramesetServlet/163...

Release Orders

ID	Total Weight	Total Volume	Source	Source City	Destination	Destination City	Domain Name
20211106-0012	0.00 KG	0.00 CU M	360933-VE	DEGGINGEN	7791-VE	STRULLENDORF	SCH

Click on  to get back to the Home Screen.

Now click on "Confirm Manual Order" to add missing data and confirm the manually created order.

Manual Orders

Create Transport Order

Confirm Manual Order

Confirm Manual Orders

Click the Actions button to open a dropdown list.

ID	Supplier Reference Number	Item Name derived from Material	Ordering Schaeffler Plant
SCH.20230905-0002	F-348168.07-0151.S...	SPECIAL PARTS	0007-Hirschaid
SCH.20230802-0009	F-357190.14-0021.K...	EXAMPLE/TOOL	0007-Hirschaid
SCH.20230814-0003	F-357190.14-0021.K...	PARTS	0072-Hochstadt
SCH.20230821-0016	...	TEST	0007-Hirschaid
SCH.20230821-0018	...	TEST2	0007-Hirschaid
SCH.20230821-0013	F-357643.05-0451.B...	...	0007-Hirschaid
SCH.20230821-0026	F-357190.14-0021.K...	...	0007-Hirschaid

Rows Selected: 1 Records 17 of 17

Handling Units

Handling Unit ID	Order Release ID	Transport Handling Unit	Handl...	Total Gross Weight	Total Gross Volume
SC 20230905-...	20230905-...	ONE WAY PAL 800X...	2	200.00 KG	0.77 CUMTR

Transportation Comments

Order Release

Order Release ID: 20230905-0002

*Goods Ready By Date: 06/09/2023 12:28:00

Delivery Date: 08/09/2023 23:59 Europe/Berlin

Ship From ID: 7507-VE

Ship From Name: ...

Ship To ID: 0007-PL

Ship To Name: SCHAEFFLER TECH

Handling Unit

Handling Unit ID: 20230905-0002-001

Handling Unit: ONE WAY PAL 800X600

Handling Unit Quantity: 2

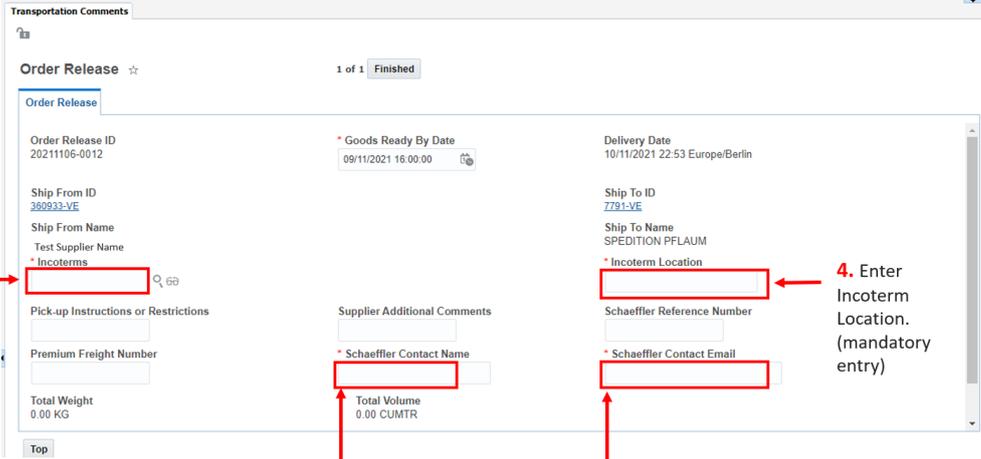
Total Gross Weight: 200.00 KG

Total Gross Volume: 0.77 CUMTR

You see your manually created orders which are not confirmed yet. In the blue and green marked sections you need to enter additional data.

1. Enlarge the “Order Release Section” to enter further necessary data. The mandatory fields are marked by *.

2. (Use the cursor to enlarge the section as described or  in chapter 4.2 Standard Process Part 2: 2 Confirm Transport Details)



3. Enter Incoterm. (mandatory entry)
See chapter 7.1 How to search for Incoterms.

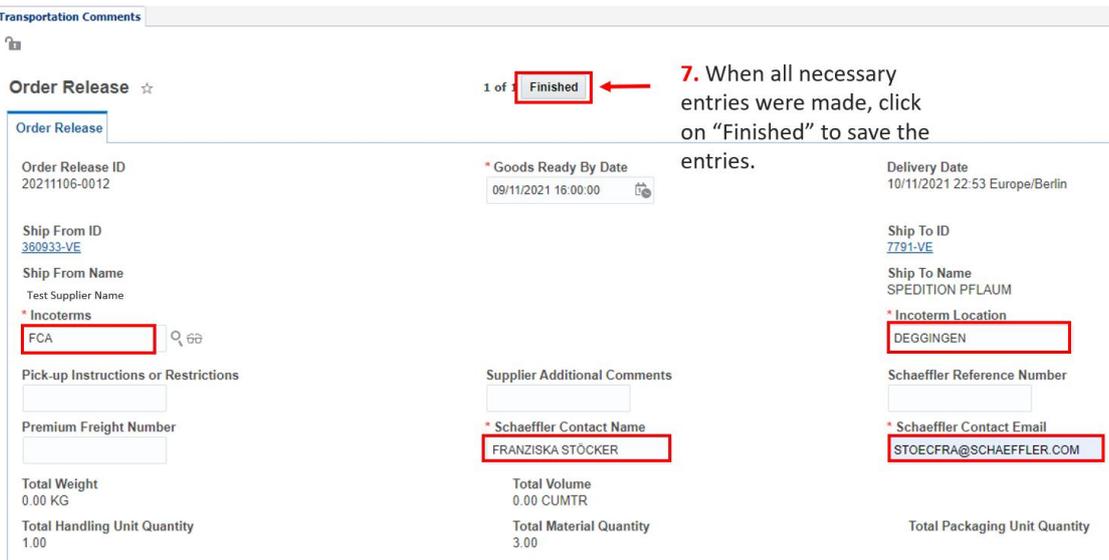
4. Enter Incoterm Location. (mandatory entry)

5. Enter the name of the Schaeffler Contact who will approve your manual order (mandatory entry).

6. Enter the Email-Address of the Schaeffler Contact who will approve your manual order (mandatory entry).

The screenshot shows the following fields and values:

- Order Release ID: 20211106-0012
- Goods Ready By Date: 09/11/2021 16:00:00
- Delivery Date: 10/11/2021 22:53 Europe/Berlin
- Ship From ID: 360933-VE
- Ship From Name: Test Supplier Name
- Ship To ID: 7791-VE
- Ship To Name: SPEDITION PFLAUM
- Incoterms: (empty)
- Incoterm Location: (empty)
- Schaeffler Contact Name: (empty)
- Schaeffler Contact Email: (empty)
- Total Weight: 0.00 KG
- Total Volume: 0.00 CUMTR



7. When all necessary entries were made, click on “Finished” to save the entries.

The screenshot shows the following fields and values:

- Order Release ID: 20211106-0012
- Goods Ready By Date: 09/11/2021 16:00:00
- Delivery Date: 10/11/2021 22:53 Europe/Berlin
- Ship From ID: 360933-VE
- Ship From Name: Test Supplier Name
- Ship To ID: 7791-VE
- Ship To Name: SPEDITION PFLAUM
- Incoterms: FCA
- Incoterm Location: DEGGINGEN
- Schaeffler Contact Name: FRANZISKA STÖCKER
- Schaeffler Contact Email: STOECFRA@SCHAEFFLER.COM
- Total Weight: 0.00 KG
- Total Volume: 0.00 CUMTR
- Total Handling Unit Quantity: 1.00
- Total Material Quantity: 3.00
- Total Packaging Unit Quantity: (empty)

When you click on “Finished” the TMS checks if all mandatory fields are filled. If not, an error message is shown. Then you need to correct the data and click again “Finished” to save the data.

Next please enlarge the “Handling Unit” section. And check/change/enter the necessary data which are marked by *.

8. Enter correct Transport Handling Unit (mandatory entry) see chapter 4.2.1.2.

9. Enter number of Handling Units. (mandatory entry)

10. Enter Total Gross Weight. (mandatory entry)

11. Enter length of HU. (mandatory entry)

12. Enter width of HU. (mandatory entry)

13. Enter height of HU. (mandatory entry)

14. Check and change Stackability Factor. See chapter 4.2.1.3 how to change it. (mandatory entry)

The screenshot shows the 'Confirm Handling Unit' screen with various input fields highlighted by red boxes and arrows pointing to the numbered instructions. The fields include 'Total Gross Weight', 'Length per Handling Unit', 'Stackability Factor', 'Width per Handling Unit', 'Height per Handling Unit', and 'Handling Unit Quantity'. A table at the bottom shows material lines with columns for ID, Material ID, Material Description, and Material Quantity.

In case you want to send it as a parcel you need to select “NON-PALLETIZED” as Transport Handling Unit at step 8. (See also chapter 5).

15. When all necessary entries were made, click on “Finished” to save the entries.

The screenshot shows the same 'Confirm Handling Unit' screen as before, but with the 'Finished' button highlighted by a red box and an arrow. The input fields now contain values: Total Gross Weight: 245.00, Length per Handling Unit: 800, Stackability Factor: 1-1, Width per Handling Unit: 600, Height per Handling Unit: 430, and Handling Unit: ONE-WAY-HALF-PAL-80. The 'Handling Unit Quantity' is 1.

When you click on “Finished” the TMS checks if all mandatory fields are filled. If not, an error message is shown. Then you need to correct the data and click again “Finished” to save the data.

To upload documents the steps are the same as described earlier.

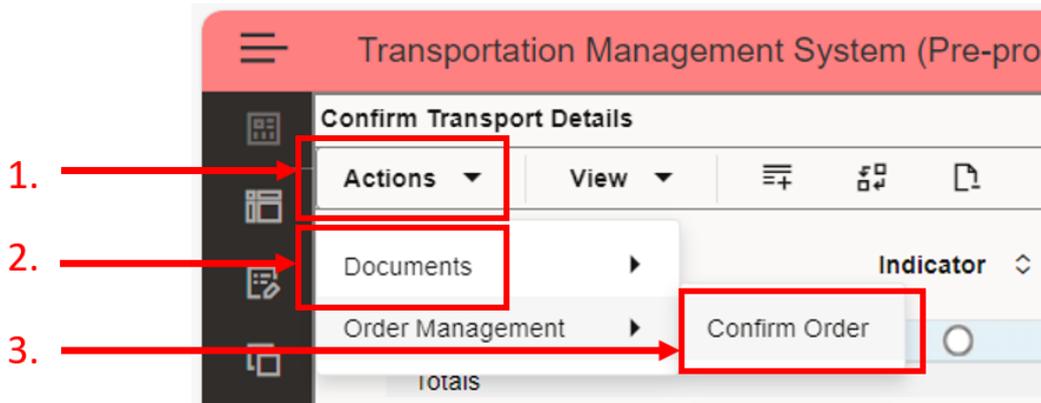
1. Actions

2. Documents

3. Upload Document

The screenshot shows the 'Transportation Management System (Pre-pro)' interface. A sidebar on the left has three icons. The main area is titled 'Confirm Transport Details' and has a toolbar with 'Actions', 'View', and other icons. The 'Actions' dropdown menu is open, showing 'Documents' and 'Order Management'. The 'Documents' option is selected, and a sub-menu is visible with 'View Documents' and 'Upload Document' options. Red boxes and arrows highlight these specific elements.

Last step is to confirm the manual order.



Then you get this message:

Process **SUPPLIER_CONFIRMED** initiated

Information Action has been initiated.

When you click on “Confirm Order” TMS checks if all mandatory fields are filled. If not, an error message is shown. Then you need to correct the data, save it by click on “Finished” and click “Confirm Order” again.

Please close the window.

Now the manual order is visible for the Schaeffler Transport Manager as “On Hold”.

In parallel the Schaeffler contact person gets an Email and is asked to approve the manual order.

Now this manually entered order is visible for the Transport Managers/Planners of Schaeffler but on status “On hold”.

The Schaeffler contact person has to confirm the manual transport order to the Schaeffler Transport Manager and only then the status will be changed so it can be planned.

After it is planned you will receive an Email which informs you about the planning result and gives you the shipment ID which was built during transport planning.

If it is a pickup done by a truck you will get the information about the LSP (Logistics Service Provider), driver, Pickup Date and Time.

In case it is parcel, then in the Email you get the information about which CEP-provider was selected and a link which connects you to the CEP-Portal to enter the data to get the labels.

Also you can see the shipment which was created in the “View Shipment”. (See also chapter 9.4)



Shipment

When you close the message window you still see your manual order.

After you do “Rerun Search”  the manual order you just confirmed is no longer visible in confirm manual order.

But you can still see it in view orders, where all your transport demands are listed.



View Orders

7.1 How to search for Incoterms

Regarding the entry of the incoterms you can enter the incoterm directly “FCA” or you can select an incoterm by clicking on the symbol  and then click on “Search” to see the whole list of incoterms and then you can select it.

Incoterms Finder

Incoterm Audit

Incoterm ID Begins With

Incoterm Desc Begins With

Domain Name Begins With

Favorites
 Yes No Both

Saved Query:

You can enter additional criteria to limit the search further.

Incoterm ID Begins With

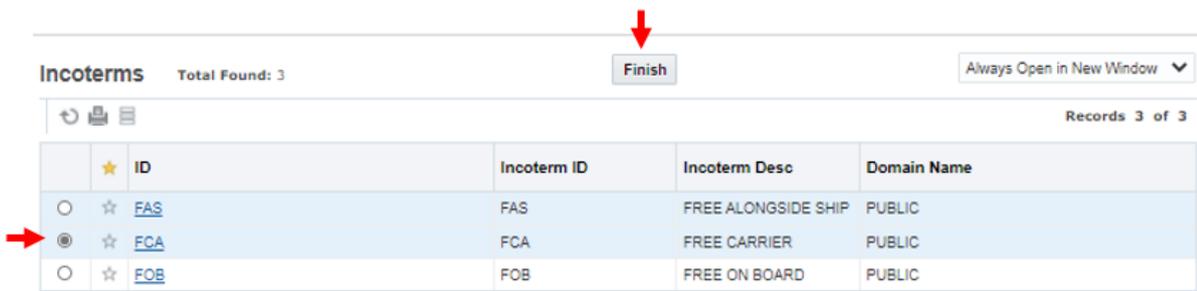
Incoterm Desc Begins With

Domain Name Begins With

Favorites
 Yes No Both

Saved Query:

Now click on “Search” and the table with the search results opens. Because of the “F” in “Incoterm ID” the search is limited to all entries which start with an “F”. Please select the correct incoterm and then click on “Finish” to save it.



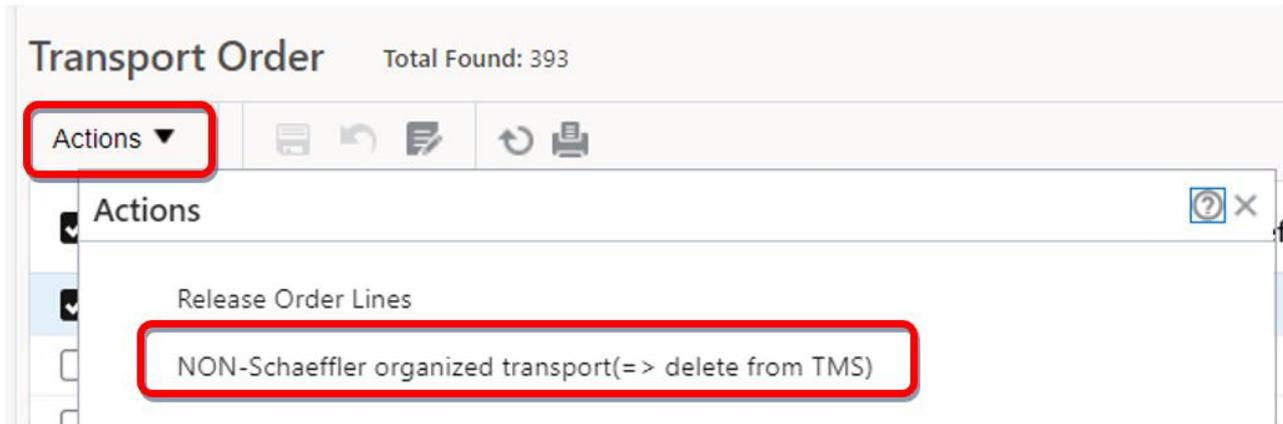
The screenshot shows a search results page for Incoterms. The page title is "Incoterms" and it indicates "Total Found: 3". A "Finish" button is located at the top right of the search results area. Below the search bar, there are icons for refresh, print, and list, and a status "Records 3 of 3". The table below lists three entries:

	★ ID	Incoterm ID	Incoterm Desc	Domain Name
<input type="radio"/>	★ FAS	FAS	FREE ALONGSIDE SHIP	PUBLIC
<input checked="" type="radio"/>	★ FCA	FCA	FREE CARRIER	PUBLIC
<input type="radio"/>	★ FOB	FOB	FREE ON BOARD	PUBLIC

You need to click on “Finish” so that “FCA” is taken as your new entry.

8 Exception: Supplier needs to organize a transport on his own cost because of backlog situation

TMS offers the function for Supplier to delete a demand from "1 Transport Order" in case he is in backlog and needs to organize this transport on suppliers own costs with his Logistics Service Provider. So this demand will not be processed in TMS anymore.



This new option is for the cases where you are too late and agreed with Schaeffler to organize a transport (premium freight) on your own costs. This happens then outside of the TMS and in the past these demands stayed in the TMS and could lead to confusion.

Now with this option you can click on "NON-Schaeffler organized transport (=> delete from TMS) and it gets deleted from this view and you no longer see it.

9 How to enter Events (Incidents)

To be able to better control a transport and react pro-actively it is necessary that certain events like

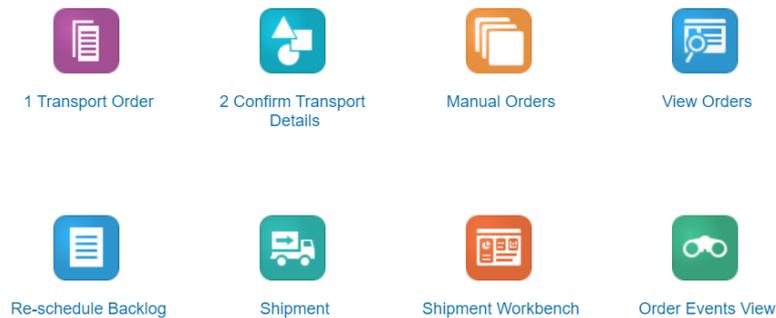
- “Goods have been picked up”
- “Goods have reached a Hub, Border...”
- “Goods have been delivered”

are registered in TMS.

It is equally important that negative events = incidents are being captured in TMS.

Example: Pick up is delayed

To enter events click on Shipment.



9.1 How to enter Pickup Event

To let us know that the goods were picked up by LSP you need to enter it as an event.

When Schaeffler has planned the transport demand you confirmed, you will get an automated Email-Notification which informs you about the planned transport = OTM-Shipment Number = S23120300001 (SYMMDDupcounting number)

This number you search or select (-> New Query ->Search)

1. Shipment ID: S231024000004

2. Search

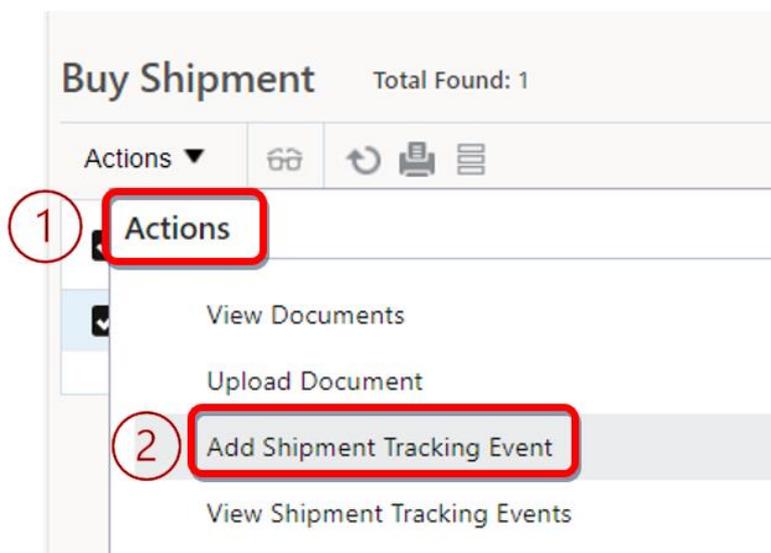
Now the selected shipment is shown.

ID	Indi...	Service Provider ID	Service Provider Name	Mode	PFR	Total Gross ...	Total Gross Volume	Pickup Date	Delivery Date	Sc
SCH.S231024000004	<input checked="" type="radio"/>	DSV-US		LTL		689 KG	3.63 CUMTR	24/10/2023 11:38 Ameri...	25/10/2023 10:38 Ameri...	DI

You mark this shipment.

ID	Indi...	Service Provider ID	Service Provider Name
SCH.S231024000004	<input checked="" type="radio"/>	DSV-US	

Now you click on "Actions"



And then you click on “Add Shipment Tracking Event.”
And enter/select the necessary information:

Tracking Event 1 of 1 New Finished 6

Identification Detail Order Equipment Special Service Driver Document Involved Parties Processing Result

Event Reason

Quick Code

* Responsible Party 1
Supplier

Notify

* Status 2
Supplier

Reason 3
Pick-up from consignor_3rd party
Picked Up

Supplier - Actual Pickup No Issue
Supplier - Actual Pickup With Incident

Event Info

* Event Date/Time 24/10/2023 13:31:00 Event End Date/Time Event Time Zone Domain Name SCH Tracking Event Type

Event Location

Shipment ID 4
S231024000004

Shipment Group ID Shipment Group Type ID

Stops
1. DIVERSIFIED ENGINEERING & PLASTICS, JACKSON, MI, US

Location ID 5
1. Supplier ABC

Top Detail

With click on “Finish” you save your event.

A message appears after you saved. When it has a green check then it is saved and you can close it.

That way you entered the date and time when this shipment (transport) was picked up by the LSP (=Departure from your location). After you saved your event it is saved to the shipment and visible for you and for Schaeffler Transport Manager.

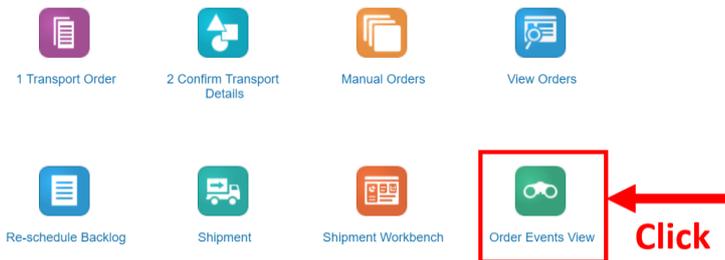
You can see all the events in Order Events View (see chapter 8.3).

9.2 How to enter a negative Event = Incident

In case something happens which will influence the Pickup of the shipment in a negative way, like a delay, you can enter it in TMS, too.

9.3 How to see the Events (Incidents)

All events which were entered by Supplier, LSP or Schaeffler are visible for all parties concerned. To see them open "Order Events View".



Here you see all your transport demands with the related shipment (transport) and the events/incidents.

Order Release

ID	Indicator	Source	Destination	Destination Location Name	Destination Location	Destination Location
SCH 20231201-0011		352773-VE	0052-PL	SCHAEFFLER USA ...	CHERAW	29520-96129
SCH 20231201-0012		6022193-V...	7791-VE	SPEdition PFLAUM	STRUL...	96129

Buy Shipment

ID	Indicator	Indicator	Service Provider	Mode	Equipment	Start Date
SCH_S231201000027			GEIS	TL	LSP-CHOICE	05/12/2023 02:26 EU

Tracking Event

ID	Shipment ID	Location	Status	Indicator	Reason	Reported Date	Event Date
32	S23120100...	6022193-V...	ACT_DEPARTU...			05/12/2023...	05/12/2023...
32	S23120100...	7791-VE	ACT_ARRIVAL			05/12/2023...	05/12/2023...

This is the transport order (OTM-Shipment) which was ordered to Logistics Service Provider (LSP)

This is the order release (transport demand you confirmed)

These are the events given by Supplier and LSP

10 How to search

10.1 How to search in: 1 Transport Order



1 Transport Order

Transportation Management System (Pre-Prod) Search STOEFCFRA@SCHAEFFLER.COM

Transport Order Total Found: 480 Always Open in New Window

Actions Records 100 of 480 More All Selected: 0

<input checked="" type="checkbox"/>	Order Base ID	Material ID	Material De...	Ordering Schaeffler ...	Material Quanti...	Already Released Q...	*Quantity to be...	*Handling Unit ID	*Supplier Referen
<input type="checkbox"/>	TEST-IB-10092021-012	0872727680000	F-348168.09-...		500	0	100		
<input type="checkbox"/>	PK-E2EIN-20210914_06	0872727680000	F-348168.09-...	0007-Hirschald	30		30	HALF-EUR-PAL-800X6...	
<input type="checkbox"/>	IB-20211011-003	0872727680000	F-348168.09-...	0007-Hirschald	600048	9000	591048	NON-PALLETIZED	
<input type="checkbox"/>	IB-20211014-002	0872727680000	F-348168.09-...	0007-Hirschald	144	50	94	NON-PALLETIZED	
<input type="checkbox"/>	IB-20211014-001	0872727680000	F-348168.09-...	0007-Hirschald	600048	5000	595048	NON-PALLETIZED	
<input type="checkbox"/>	PO-0029765914-00010-0...	0951406200000	F-609127.55-...		5000	512	4488	STEEL-PAL-1210X800...	
<input type="checkbox"/>	PK-TESTIB-20211102_08	0855205430000	F-607932.626...	0007-Hirschald	19008		19008	ONE-WAY-PAL-1180X1...	
<input type="checkbox"/>	PK-E2EIN-20211025_15	0740975120000	F-347558-002...		4000	539	3461	ONE-WAY-PAL-1180X1...	123-AKOS
<input type="checkbox"/>	PK-E2EIN-20211025_14	0740975120000	F-347558-002...		39		39	ONE-WAY-PAL-1200X8...	JHGSADJH
<input type="checkbox"/>	PK-E2EIN-20211026_31	0951895640000	F-347972.02-...	0007-Hirschald	346436	34	346402	HALF-EUR-PAL-800X6...	KASHDKJ
<input type="checkbox"/>	PK-E2EIN-20211026_34	0951895640000	F-347972.02-...	0007-Hirschald	346436	3464	342972	HALF-EUR-PAL-800X6...	
<input type="checkbox"/>	AE-JBTEST-211105-02	0813123500000	F-347972.05-...		100000		100000	EUR-PAL-1200X800MM	

New Query Refine Query Export Saved Query: Execute Query

Click on "New Query" to start a search

Then you get this "Search Screen" where you have different criteria for which you can search.

Transportation Management System (Pre-Prod) Search

Transport Order Finder

Search

Order Base ID <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Clear"/> Begins With <input type="button" value="v"/>	Destination Location <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Clear"/> Begins With <input type="button" value="v"/>
Source Location <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Clear"/> Begins With <input type="button" value="v"/>	Destination City <input type="text"/> Begins With <input type="button" value="v"/>
Source City <input type="text"/> Begins With <input type="button" value="v"/>	Destination Postal Code <input type="text"/> Begins With <input type="button" value="v"/>
Source Postal Code <input type="text"/> Begins With <input type="button" value="v"/>	Destination Location Country Code ID <input type="text"/> Begins With <input type="button" value="v"/>
Source Location Country Code ID <input type="text"/> Begins With <input type="button" value="v"/>	Material <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Clear"/> Begins With <input type="button" value="v"/>
	Supplier Reference Number <input type="text"/> Contains <input type="button" value="v"/>

Search Sort Order Actions Export Saved Query: Execute Query Actions Edit Save

And when you enter a criteria you have the following options how to search:

- Begins With
- Ends With
- Is Null
- Not Null
- One Of
- Not One Of
- Contains
- Same As
- Not Same As
- Not Same As, Include Null Values

Order Release ID

Begins With

Goods Ready By Begins With

Ends With

Delivery_By Is Null

Not Null

Ship From One Of

Not One Of

Contains

Ship To Same As

Not Same As

Not Same As, Include Null Values

1. If the element begins with a certain word
2. If the element ends with a certain word
3. If the element needs to be null
4. If the element is not null
5. If there is more than one criteria and you want them all listed
6. All the ones apart from the one criteria
7. When only a part of the element is known
8. When you want the exact one

Depending on how specific your entry is, you select the option.
Example:

☰
🏠
🔍 Search

Transportation Management System (Pre-Prod)

Transport Order Finder

Search

<p>Order Base ID <input type="text"/> Begins With</p> <p>Source Location <input type="text"/> Begins With</p> <p>Source City <input type="text"/> Begins With</p> <p>Source Postal Code <input type="text"/> Begins With</p> <p>Source Location Country Code ID <input type="text"/> Begins With</p>	<p>Destination Location <input type="text"/> Begins With</p> <p>Destination City <input type="text" value="STRULLENDORF"/> Same As</p> <p>Destination Postal Code <input type="text"/> Begins With</p> <p>Destination Location Cour <input type="text"/> One Of</p> <p>Material <input type="text"/> Not Same As, Include Null Values</p> <p>Supplier Reference Number <input type="text"/> Contains</p>
--	--

Search Sort Order Actions Export
Saved Query: Execute Query Actions Edit Save

Transportation Management System (Pre-Prod) Search

Transport Order Finder

Search

Order Base ID Begins With

Source Location Begins With

Source City Begins With

Source Postal Code Begins With

Source Location Country Code ID Begins With

Destination Location Begins With

Destination City Same As

Destination Postal Code Begins With

Destination Location Country Code ID Begins With

Material Not Same As

Supplier Reference Number Contains

Search Sort Order Actions Export Saved Query: Execute Query Actions Edit Save

Click on "Search" to start the search for all transport demands which have Strullendorf as destination city.

Now you only see the transport demands that go to "Strullendorf" as destination city.

Transportation Management System (Pre-Prod) Search STOEFCRA@SCHAEFFLER.CO

Transport Order

Total Found: 414 Always Open in New Window

Records 100 of 414 More All Select

Order Base ID	Material ID	Material De...	Ordering Schaeffler ...	Material Quanti...	Already Released Q...	*Quantity to be...	*Handling Unit ID	*Supplier Refer
TEST-IB-10092021-012	0872727680000	F-348168.09-...		500	0	100		
PO-0029765914-00010-0...	0851406200000	F-609127.55-...		5000	512	4488	STEEL-PAL-1210X800...	
AE-IBTEST-211105-02	0813123500000	F-347972.05-...		100000		100000	EUR-PAL-1200X800MM	
PK-E2EIN-20211025_15	0740975120000	F-347558-002...		4000	539	3461	ONE-WAY-PAL-1180X1...	123-AKOS
PK-E2EIN-20211025_14	0740975120000	F-347558-002...		39		39	ONE-WAY-PAL-1200X8...	JHGSADJH
AE-IBTEST-211105-03	0813123500000	F-347972.05-...		100000		100000	EUR-PAL-1200X800MM	
AE-IBTEST-211105-04	0846664800000	F-348168.07-...		100000	1920	98080	HALF-EUR-PAL-800X6...	T1
AE-IBTEST-211105-01	0813123500000	F-347972.05-...		100000		100000	EUR-PAL-1200X800MM	
TEST-YQ-SCH20210810...	0800670850000	F-347972-006...		500	124	376	ONE-WAY-HALF-PAL-8...	
PK-E2EIN-20211025_08	0740975120000	F-347558-002...		39		39	UNKNOWN	1323
PK-E2EIN-20211025_16	0740975120000	F-347558-002...		400	40	360	UNKNOWN	
PK-E2EIN-20211010_03	0851895640000	F-347972.02-...		6336	339	5997	HALF-EUR-PAL-800X6...	FRANZISKA1

New Query Refine Query Export Saved Query: Execute Query

Click on "Refine Query" if you want to narrow the search further.

Transport Order Finder

Search

Order Base ID <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Clear"/> Begins With <input type="button" value="v"/>	Destination Location <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Clear"/> Begins With <input type="button" value="v"/>
Source Location <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Clear"/> Begins With <input type="button" value="v"/>	Destination City <input type="text" value="STRULLENDORF"/> Same As <input type="button" value="v"/>
Source City <input type="text"/> Begins With <input type="button" value="v"/>	Destination Postal Code <input type="text"/> Begins With <input type="button" value="v"/>
Source Postal Code <input type="text"/> Begins With <input type="button" value="v"/>	Destination Location Country Code ID <input type="text"/> Begins With <input type="button" value="v"/>
Source Location Country Code ID <input type="text"/> Begins With <input type="button" value="v"/>	Material <input type="text" value="855"/> <input type="button" value="Search"/> <input type="button" value="Clear"/> Contains <input type="button" value="v"/>
	Supplier Reference Number <input type="text"/> Contains <input type="button" value="v"/>

Saved Query:

Click on "Search" to start the search for all transport demands which have Strullendorf as destination city and where the material ID contains the number "855"

If you click on "Export" you can also export data to Excel.

Transport Order

Total Found: 3

Actions ▼

<input checked="" type="checkbox"/>	Order Base ID	Material ID	Material De...	Ordering Schaeffler ...	Material Quanti...	Already Released Q...	*Quar
<input type="checkbox"/>	PK-E2EIN-20211022_03	0855205430000	F-607932.626...		19008	600	
<input type="checkbox"/>	PK-E2EIN-20211022_04	0855205430000	F-607932.626...		19008		
<input type="checkbox"/>	SA-0005265076-00010-5...	0855205430000	F-607932.626...	0007-Hirschaid	8400		

10.2 How to search in: 2 Confirm Transport Details



2 Confirm Transport Details

“2 Confirm Transport Details” is a “workbench”. In a workbench you start the search with this



symbol

Next you get the following search screen:

Order Release Finish

Order Release Total Found: 336 Always Open in New Window

Records 100 of 336 [More](#) [All](#) Selected: 0

<input checked="" type="checkbox"/>	+	ID	In...	Supplier Reference ...	Order Base ID's	Material ID	Material Descriptio
<input type="checkbox"/>	+	SCH_20210915-0006	<input type="radio"/>	NA	PO-0030363725-00010...	0953958060000	F-346114.22-0058.AC
<input type="checkbox"/>	+	SCH_SD_TEST3	<input type="radio"/>	NA	SA-0005165153-00010...	0866698699001	F-357200.01-0471.B2
<input type="checkbox"/>	+	SCH_SD-TEST1	<input type="radio"/>	NA	SA-0005165153-00010...	0866128160000	F-347573.45-0530.S1
<input type="checkbox"/>	+	SCH_20211012-0007	<input type="radio"/>	⚠ NA	IB-20211011-003	0872727680000	F-348168.09-0151.SF
<input type="checkbox"/>	+	SCH_20211013-0014	<input type="radio"/>	NA	IB-20211014-002	0872727680000	F-348168.09-0151.SF
<input type="checkbox"/>	+	SCH_20211013-0013	<input type="radio"/>	NA	IB-20211014-001	0872727680000	F-348168.09-0151.SF
<input type="checkbox"/>	+	SCH_20211012-0008	<input type="radio"/>	NA	IB-20211011-003	0872727680000	F-348168.09-0151.SF
<input type="checkbox"/>	+	SCH_20210930-0015	<input type="radio"/>	NA	PK-E2EIN-20210921_01	0844581270000	F-347124.06-0021.KC
<input type="checkbox"/>	+	SCH_20210930-0016	<input type="radio"/>	NA	PK-E2EIN-20210921_01	0844581270000	F-347124.06-0021.KC
<input type="checkbox"/>	+	SCH_20210930-0017	<input type="radio"/>	⚠ NA	PK-E2EIN-20210921_02	0844581270000	F-347124.06-0021.KC
<input type="checkbox"/>	+	SCH_20210930-0018	<input type="radio"/>	NA	PK-E2EIN-20210921_02	0844581270000	F-347124.06-0021.KC
<input type="checkbox"/>	+	SCH_20210930-0019	<input type="radio"/>	NA	PK-E2EIN-20210921_02	0844581270000	F-347124.06-0021.KC
<input type="checkbox"/>	+	SCH_20210930-0023	<input type="radio"/>	NA	PO-0029765914-00010...	0951406200000	F-609127.55-0261.RI
<input type="checkbox"/>	+	SCH_20211106-0005	<input type="radio"/>	T1	AE-IBTEST-211105-04	0846664800000	F-348168.07-0151.SF
<input type="checkbox"/>	+	SCH_20211026-0016	<input type="radio"/>	NA	PK-E2EIN-20211026_34	0951895640000	F-347972.02-0021.KC
<input type="checkbox"/>	+	SCH_20211026-0018	<input type="radio"/>	NA	PK-E2EIN-20211026_31	0951895640000	F-347972.02-0021.KC
<input type="checkbox"/>	+	SCH_20211027-0005	<input type="radio"/>	⚠ 123-AKOS	PK-E2EIN-20211025_15	0740975120000	F-347558-0021.KOL
<input type="checkbox"/>	+	SCH_20211104-0008	<input type="radio"/>	NA	PK-TESTIB-20211104_01	0855205430000	F-607932.626-HLS

New Query Refine Query Export Saved Query: Execute Query

Click on “New Query” to start a search

Order Release

Finish

Order Release Finder

Order Release

<p>Order Release ID <input type="text"/> Begins With</p> <p>Ready To Ship <input type="text"/> Same As</p> <p>Material ID <input type="text"/> Begins With</p> <p>Ship From <input type="text"/> Begins With</p> <p>Supplier Additional Comments <input type="text"/> Same As</p> <p>Incoterm ID <input type="text"/> Begins With</p> <p>Schaeffler Contact Name <input type="text"/> Same As</p> <p>Pick-up Instructions or Restrictions <input type="text"/> Same As</p> <p>Premium Freight Number <input type="text"/> Begins With</p>	<p>Order Base ID <input type="text"/> Begins With</p> <p>Schaeffler Reference Number <input type="text"/> Same As</p> <p>Delivery Date <input type="text"/> Same As</p> <p>Material Description <input type="text"/> Begins With</p> <p>Ship To <input type="text"/> Begins With</p> <p>Destination Location Comment <input type="text"/> Same As</p> <p>Incoterm Location <input type="text"/> Begins With</p> <p>Schaeffler Contact Email <input type="text"/> Same As</p> <p>Supplier Reference Number <input type="text"/> Contains</p>
---	---

Now you can search for the various criteria as described already in chapter 9.2.

10.3 View Orders



View Orders

This screen lists all orders for one supplier.

Transportation Management System (Pro-Prod)

Order Release Total Found: 852 With click on each Header you can sort the data

ID	Ind	Supplier Reference ...	Order Base IDs	Material ID	Material Description	Ordering Sc...	Goods Ready ...	Goods Ready by Lo...	G. Delivery Date	Incoterms	Incoterm Location	Ship To	Ship To Name
SCH-202111028-0019			PK-EZEN-20211028_32	0951895640000	F-347972 02-0021 KOL...		28/10/2021 12:30	919-VE	P.. 21/12/2021 23:59	EXXI	BONNEVILLE	6007-PL	SCHAEFFLER TECH
SCH-202111025-0017	▲	123	PK-EZEN-20211025_18	0740975120000	F-347550-0021 KOL.M...		27/10/2021 12:30	919-VE	P.. 31/12/2021 16:49	EXXI	BONNEVILLE	7791-VE	SPECTION PFLAUM
SCH-202111025-0018	▲	123	PK-EZEN-20211025_19	0740975120000	F-347550-0021 KOL.M...		26/10/2021 12:30	919-VE	P.. 31/12/2021 16:49	EXXI	BONNEVILLE	7791-VE	SPECTION PFLAUM
SCH-202111025-0015	▲	123	PK-EZEN-20211025_20	0740975120000	F-347550-0021 KOL.M...		25/10/2021 12:30	919-VE	P.. 31/12/2021 16:49	EXXI	BONNEVILLE	7791-VE	SPECTION PFLAUM
SCH-202111027-0005	▲	123-AKOS	PK-EZEN-20211025_15	0740975120000	F-347550-0021 KOL.M...	0007-Hirschaid	28/10/2021 08:00	919-VE	P.. 31/12/2021 23:59	EXXI	BONNEVILLE	7791-VE	SPECTION PFLAUM
SCH-202111025-0012	▲	123-AKOS	PK-EZEN-20211025_15	0740975120000	F-347550-0021 KOL.M...	0007-Hirschaid	28/10/2021 12:30	919-VE	P.. 31/12/2021 23:59	EXXI	BONNEVILLE	7791-VE	SPECTION PFLAUM
SCH-20211109-0010	●	1230, 12309	SA-0005164900-00010..	0866128160000	F-347573 45-0530 STA...	0007-Hirschaid	05/11/2021 15:40	30843-VE	S. 10/11/2021 23:59	EXXI	HUTTHURM	7791-VE	SPECTION PFLAUM
SCH-20211103-0020	○	12324	SA-0005164900-00010..	0558668320000	F-448156 72-1080 SPKP	0007-Hirschaid	04/11/2021 15:40	30843-VE	T. 08/11/2021 23:59	EXXI	STENACH	7791-VE	SPECTION PFLAUM
SCH-20211108-0005	●	123456	SA-0005171770-00010..	0671016318011	F-347195-6056 DL.NW...	0007-Hirschaid	19/11/2021 13:41	18871-VE	M. 15/11/2021 23:59	EXXI	PIREBAUM	7791-VE	SPECTION PFLAUM
SCH-202111025-0009	●	13434	PK-EZEN-20211025_03	0740975120000	F-347550-0021 KOL.M...		27/10/2021 12:30	919-VE	P.. 19/12/2021 23:59	EXXI	BONNEVILLE	7791-VE	SPECTION PFLAUM
SCH-20211104-0002	○	14	SA-0005164900-00010..	0558668320000	F-448156 72-1080 SPKP	0007-Hirschaid	05/11/2021 13:26	30843-VE	T. 06/11/2021 23:59	EXXI	STENACH	7791-VE	SPECTION PFLAUM
SCH-20211104-0003	○	14	SA-0005164900-00010..	0558668320000	F-448156 72-1080 SPKP	0007-Hirschaid	05/11/2021 13:26	30843-VE	T. 06/11/2021 23:59	EXXI	STENACH	7791-VE	SPECTION PFLAUM
SCH-20211104-0005	○	14	SA-0005164900-00010..	0558668320000	F-448156 72-1080 SPKP	0007-Hirschaid	05/11/2021 13:26	30843-VE	T. 06/11/2021 23:59	EXXI	STENACH	7791-VE	SPECTION PFLAUM
SCH-20211102-0008	○	14109-1	MANUAL-14100-VE-02	UNKNOJHN	PRO1	0007-Hirschaid	05/11/2021 16:15	14100-VE	R. 15/11/2021 16:15	EXXI	STENACH	6007-PL	SCHAEFFLER TECH
SCH-20211102-0009	○	14109-2	MANUAL-14100-VE-02	UNKNOJHN	PRO2	0072-Hirschaid	05/11/2021 16:15	14100-VE	R. 15/11/2021 16:15	EXXI	STENACH	7791-VE	SPECTION PFLAUM
SCH-20211102-0010	○	14109-3	MANUAL-14100-VE-02	UNKNOJHN	PRO3	0007-Hirschaid	05/11/2021 16:15	14100-VE	R. 15/11/2021 16:15	EXXI	STENACH	7791-VE	SPECTION PFLAUM
SCH-202111025-0004	○	14234	PK-EZEN-20211025_09	0740975120000	F-347550-0021 KOL.M...		27/10/2021 12:30	919-VE	P.. 19/12/2021 23:59	EXXI	BONNEVILLE	7791-VE	SPECTION PFLAUM
SCH-202111025-0007	○	235	PK-EZEN-20211025_10	0740975120000	F-347550-0021 KOL.M...		27/10/2021 12:30	919-VE	P.. 19/12/2021 23:59	EXXI	BONNEVILLE	7791-VE	SPECTION PFLAUM
SCH-202111025-0008	○	3464	PK-EZEN-20211025_04	0740975120000	F-347550-0021 KOL.M...		28/10/2021 12:30	919-VE	P.. 19/12/2021 23:59	EXXI	BONNEVILLE	7791-VE	SPECTION PFLAUM
SCH-20211102-0010	●	35345	PK-TESTIB-20211102_05	0855205430000	F-607932 426-HLS		04/11/2021 12:30	17729-VE	A. 21/12/2021 00:18	EXXI	MEMMINGEN	6007-PL	SCHAEFFLER TECH
SCH-202111025-0011	○	4545	PK-EZEN-20211025_05	0740975120000	F-347550-0021 KOL.M...		28/10/2021 12:30	919-VE	P.. 31/12/2021 16:57	EXXI	BONNEVILLE	7791-VE	SPECTION PFLAUM
SCH-202111025-0008	○	4545	PK-EZEN-20211025_11	0740975120000	F-347550-0021 KOL.M...		28/10/2021 12:30	919-VE	P.. 31/12/2021 16:57	EXXI	BONNEVILLE	7791-VE	SPECTION PFLAUM
SCH-202111025-0019	○	4546	PK-EZEN-20211025_11	0740975120000	F-347550-0021 KOL.M...		27/10/2021 12:30	919-VE	P.. 31/12/2021 16:57	EXXI	BONNEVILLE	7791-VE	SPECTION PFLAUM

Click on "New Query" to start a search

By clicking on "New Query" you can start a search.

If you click on "New Query" to start a search, a search screen opens up where you can limit the search by entering further criteria. The "Order Release Finder" helps you to find the order you are searching for.

Order Release Finder

Order Release

<p>Order Release ID <input type="text"/> Begins With</p> <p>Ready To Ship <input type="text"/> Same As</p> <p>Delivery Date <input type="text"/> Same As</p> <p>Ship From <input type="text"/> Begins With</p> <p>Ship To <input type="text"/> Begins With</p> <p>Incoterm ID <input type="text"/> Begins With</p> <p>Incoterm Location <input type="text"/> Begins With</p> <p>Order Base ID <input type="text"/> Begins With</p>	<p>Supplier Additional Comments <input type="text"/> Same As</p> <p>Destination Location Comment <input type="text"/> Same As</p> <p>Schaeffler Contact Name <input type="text"/> Same As</p> <p>Schaeffler Contact Email <input type="text"/> Same As</p> <p>Pick-up Instructions or Restrictions <input type="text"/> Same As</p> <p>Premium Freight Number <input type="text"/> Begins With</p> <p>Schaeffler Reference Number <input type="text"/> Same As</p> <p>Supplier Reference Number <input type="text"/> Contains</p>
--	---

In this screen you can enter the specific criteria you want to search for. Also there are different ways to define how the search is done.

Order Release ID	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
		Begins With			
Goods Ready By	<input type="text"/>	Begins With	→	1. If the element begins with a certain word	
		Ends With	→	2. If the element ends with a certain word	
Delivery_By	<input type="text"/>	Is Null	→	3. If the element needs to be null	
		Not Null	→	4. If the element is not null	
Ship From	<input type="text"/>	One Of	→	5. If there is more than one criteria and you want them all listed	
		Not One Of	→	6. All the ones apart from the one criteria	
Ship To	<input type="text"/>	Contains	→	7. When only a part of the element is known	
		Same As	→	8. When you want the exact one	
		Not Same As			
		Not Same As, Include Null Values			

The more criteria you enter, the more detailed the search.



Click on "Search" to start the search

If you click on "Export" you can also export data to Excel.

10.4 Shipment



Shipment

In this screen the supplier can see the list of all the shipments that have been created for the suppliers orders.

Transportation Management System (Test) Search SUP-6744@OMX.AT

Buy Shipment Total Found: 31 Always Open in New Window

Records 31 of 31 Selected: 0

ID	Indi...	Service Provider Na...	Mode	Total Gross ...	Total Gross Volume	Pickup Date	Delivery Date	Source Location Na...	Destination Locati...	Total Net W...	Total Net Vo...	Destination City	Destination
SCH_S2103300000023			TL	215 KG	0.00 CUMTR	31/03/2021 07:00 Euro...	01/04/2021 10:50 Euro...	SPEDITION PFLAUM...		215 KG	0.00 CUMTR		
SCH_S2009120000021	W		TL	100 KG	1.00 CUMTR	21/09/2020 20:14 Euro...	22/09/2020 14:43 Euro...	SCHAEFFLER TECHN...		100 KG	1.00 CUMTR		
SCH_S2103120000019			TL	6,882 KG	3.45 CUMTR	19/03/2021 08:00 Euro...	19/03/2021 13:00 Euro...	EMIL HEMBECK GMB...	SPEDITION PFLAUM ...	6,882 KG	2,59 CUMTR	STRULLENDORF	99129
SCH_S2103150000023			TL	29 KG	0.14 CUMTR	15/03/2021 10:58 Euro...	15/03/2021 12:37 Euro...	EMIL HEMBECK GMB...	SPEDITION PFLAUM ...	19 KG	0.07 CUMTR	STRULLENDORF	99129
SCH_S2009170000021			TL	100 KG	0.10 CUMTR	21/09/2020 18:00 Euro...	22/09/2020 09:00 Euro...	SCHAEFFLER TECHN...		100 KG	0.10 CUMTR		
SCH_S2010090000021			PARCEL	50 KG	0.30 CUMTR	12/10/2020 12:14 Euro...	13/10/2020 12:14 Euro...	SCHAEFFLER TECHN...		50 KG	0.30 CUMTR		
SCH_S2104050000021			TL	325 KG	0.99 CUMTR	07/04/2021 18:30 Euro...	07/04/2021 23:14 Euro...	EMIL HEMBECK GMB...	SCHAEFFLER TECHN...	306 KG	0,85 CUMTR	HIRSCHAID	99114
SCH_S2104120000022			TL	2,116 KG	6,23 CUMTR	12/04/2021 08:15 Euro...	12/04/2021 14:56 Euro...	EMIL HEMBECK GMB...	SPEDITION PFLAUM ...	1,992 KG	5,29 CUMTR	STRULLENDORF	99129
SCH_S2009120000028			TL	1 KG	0.05 CUMTR	14/09/2020 18:00 Euro...	15/09/2020 09:00 Euro...	SCHAEFFLER TECHN...		1 KG	0,05 CUMTR		
SCH_S2009120000029			TL	120 KG	0,90 CUMTR	14/09/2020 18:00 Euro...	15/09/2020 09:00 Euro...	SPEDITION PFLAUM ...		120 KG	0,90 CUMTR		
SCH_S2009120000029			TL	10 KG	0,50 CUMTR	14/09/2020 18:00 Euro...	15/09/2020 09:00 Euro...	SCHAEFFLER TECHN...		10 KG	0,50 CUMTR		
SCH_S2009120000014			PARCEL	45 KG	0,80 CUMTR	14/09/2020 18:00 Euro...	15/09/2020 09:00 Euro...	SCHAEFFLER TECHN...		45 KG	0,80 CUMTR		
SCH_S2009120000019			PARCEL	10 KG	0,38 CUMTR	14/09/2020 18:00 Euro...	17/09/2020 09:00 Euro...	SCHAEFFLER TECHN...		10 KG	0,38 CUMTR		
SCH_S2009120000020			PARCEL	1 KG	0,40 CUMTR	14/09/2020 18:00 Euro...	15/09/2020 09:00 Euro...	SCHAEFFLER TECHN...		1 KG	0,40 CUMTR		
SCH_S2103145000021			TL	325 KG	0,99 CUMTR	24/03/2021 09:59 Euro...	25/03/2021 08:00 Euro...	EMIL HEMBECK GMB...	SPEDITION PFLAUM ...	306 KG	0,85 CUMTR	STRULLENDORF	99129
SCH_S2009110000029			TL	20 KG	0,70 CUMTR	23/09/2020 18:00 Euro...	23/09/2020 09:00 Euro...	SCHAEFFLER TECHN...		20 KG	0,70 CUMTR		
SCH_S2009120000022			TL	100 KG	0,10 CUMTR	21/09/2020 20:14 Euro...	22/09/2020 14:43 Euro...	SCHAEFFLER TECHN...		100 KG	0,10 CUMTR		
SCH_S2009150000024			TL	100 KG	0,10 CUMTR	21/09/2020 18:00 Euro...	22/09/2020 14:43 Euro...	SCHAEFFLER TECHN...		100 KG	0,10 CUMTR		
SCH_S2010030000021			TL	100 KG	0,10 CUMTR	05/10/2020 18:00 Euro...	06/10/2020 09:00 Euro...	SCHAEFFLER TECHN...		100 KG	0,10 CUMTR		
SCH_S2010140000021			PARCEL	10 KG	0,35 CUMTR	19/10/2020 18:00 Euro...	20/10/2020 09:00 Euro...	SCHAEFFLER TECHN...		10 KG	0,35 CUMTR		
SCH_S2104070000023			TL	325 KG	0,99 CUMTR	12/04/2021 18:30 Euro...	13/04/2021 14:15 Euro...	EMIL HEMBECK GMB...	SPEDITION PFLAUM ...	306 KG	0,85 CUMTR	STRULLENDORF	99129

New Query Refine Query Export Saved Query: Execute Query

Here is also the option to sort, search and export data.

10.5 Shipment Workbench



Shipment Workbench

The screenshot displays the Transportation Management System (Prod) interface. The left pane, titled 'Booked Shipments', contains a table with columns: ID, Enroute, H a z., Service Provider ID, Mo de, and Equipm ent. The table lists several shipment records with their respective statuses and providers. Below the table, it indicates 'Records 100 of 1000'. The right pane shows a map of Europe and surrounding regions, including Norway, Finland, and parts of the Middle East and Africa. The map includes major cities and geographical features.

ID	Enroute	H a z.	Service Provider ID	Mo de	Equipm ent
SCH S23120700...	ENROUTE_NOT ST...		DACHSER	TL	LSP-CH
SCH S23120700...	ENROUTE_NOT ST...		GEIS	TL	LSP-CH
SCH S23120700...	ENROUTE_NOT ST...		GEIS	TL	LSP-CH
SCH S23120600...	ENROUTE_NOT ST...		GEIS	TL	LSP-CH
SCH S23120600...	ENROUTE_NOT ST...		GEIS	TL	LSP-CH
SCH S23120600...	ENROUTE_ENROUTE		DACHSER	TL	LSP-CH
SCH S23120500...	ENROUTE_NOT ST...		RABEN	LTL	LSP-CH
SCH S23120500...	ENROUTE_NOT ST...		GEIS	TL	LSP-CH

The shipment workbench shows the shipments and the LSP's (after planning). If you select (mark) one shipment you will see your related transport orders. Also the shipment workbench shows the status of a shipment, like if it was picked up or delivered or delayed etc. Just scroll to the right.

Status "Enroute" gives information about the status of transport execution.

Enroute	Status
ENROUTE_COMPLETED	SECURE RESOURCES_ACCEPTED
ENROUTE_ENROUTE	SECURE RESOURCES_ACCEPTED
ENROUTE_COMPLETED	SECURE RESOURCES_ACCEPTED
ENROUTE_NOT STARTED	SECURE RESOURCES_ACCEPTED
ENROUTE_COMPLETED	SECURE RESOURCES_ACCEPTED
ENROUTE_COMPLETED	SECURE RESOURCES_ACCEPTED

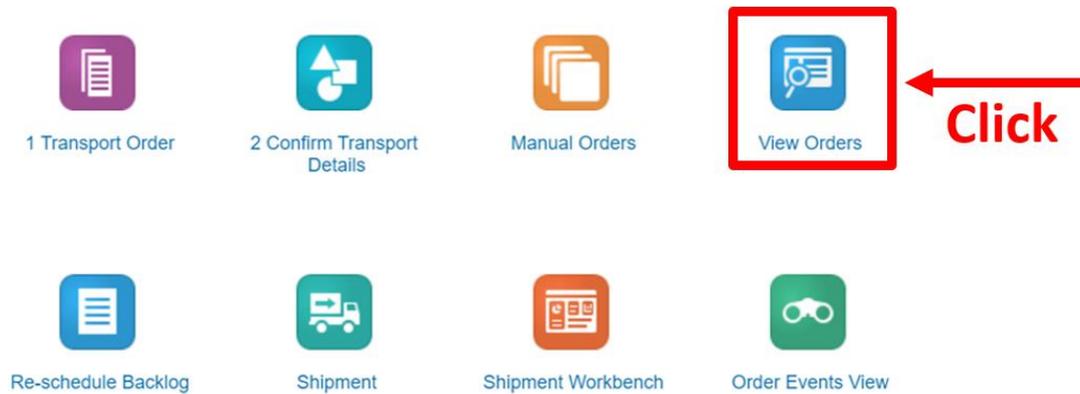
ENROUTE_COMPLETED: picked up and delivered
 ENROUTE_ENROUTE: picked up but not yet delivered
 ENROUTE_NOT STARTED: not picked up yet
 ENROUTE_DELAYED: delayed

Status: SECURE RESOURCES_ACCEPTED = LSP has agreed to execute the shipment

11 Upload of Documents

TMS has always the option to upload documents. All uploaded documents are visible for all related parties to the transport. (see also „2 Confirm Transport Details“)

Click on “View Orders”.



Order Release

Total Found: 3

<input checked="" type="checkbox"/>	+	ID	Ind	Ready To Ship	Delivery Date	Incoterms	Ship From
<input checked="" type="checkbox"/>	+	SCH.SA-0005189427-00010-5015	<input type="radio"/>		08/04/2021 23:59...	EXW	299333-VE
<input type="checkbox"/>	+	SCH.SA-0005171835-00010-1089	<input type="radio"/>		09/04/2021 23:59...	EXW	299333-VE
<input type="checkbox"/>	+	SCH.PO-0028804018-00010-0001	<input type="radio"/>	06/04/2021 09:35...	12/04/2021 23:59...	FCA	299333-VE
Total							

You need to mark the order to which you want to upload documents. Then click on “Actions”.

Order Release

Total Found: 3

<input checked="" type="checkbox"/>	+	ID	Ind	Ready To Ship	Delivery
<input checked="" type="checkbox"/>	+	SCH.SA-0005189427-00010-5015	<input type="radio"/>		08/04/202
<input type="checkbox"/>	+	SCH.SA-0005171835-00010-1089	<input type="radio"/>		09/04/202
<input type="checkbox"/>	+	SCH.PO-0028804018-00010-0001	<input type="radio"/>	06/04/2021 09:35...	12/04/202
Total					

Actions	
Order Management	
Utilities	
View Documents	
Upload Document	

Upload Document

* Document File



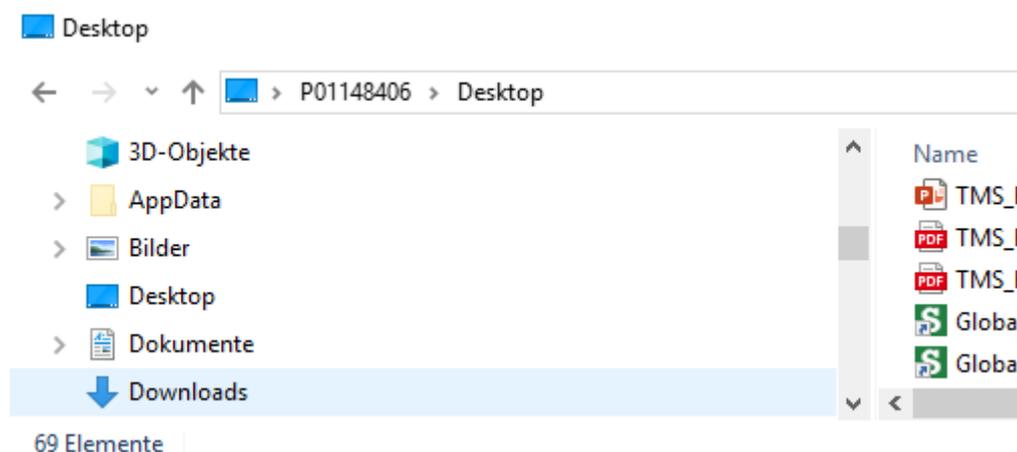
Content Management System



Upload

Click on "Select file".

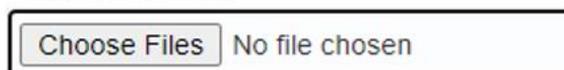
Now Explorer opens and you can select a document.



You select the document and click on open.

Upload Document

* Document File



Content Management System



By clicking on "Upload" the document is uploaded to the order and is available for all authorized parties.

Documents Upload Successful

You have successfully uploaded the following documents:

Document ID	File Name	View Content	Document Type
SCH.DOCUMENT-013	Document.docx	<input type="button" value="View Content"/>	<input type="text" value="Select Document Type."/> <input type="button" value="Go"/>

12 How to change your Password

Open Oracle Cloud Account

<https://otmgtm-a611142.otm.em2.oraclecloud.com/>

ORACLE Cloud
a611142
Oracle Cloud Account Sign In

User Name

Password

Sign In

Need help signing in? [Click here](#)

ORACLE Cloud
a611142

Kennwort vergessen?
Haben Sie Probleme mit Ihrem Kennwort? Setzen Sie es hier zurück.

Wie lautet Ihr Benutzername?

Weiter

Abbrechen

1. Benutzernamen eingeben
Benutzername ist ihre Firmen-Email-Adresse

2. Anklicken

ORACLE Cloud

a611142

franziska.stoecker@schaeffler.com



Password Reset Notification Sent.

A password reset notification will be sent to the recovery email address associated with your username **franziska.stoecker@schaeffler.com**. If you haven't received the password reset email, then please check your spam folder or contact your system administrator. You can also retry after 10 minutes.

Now wait for the Email.

Please Reset Your Password for Your a611142 Account

Oracle <no-reply@oracle.com>
An Stoecker, Franziska SP/HZA-LSP

Wenn Probleme mit der Darstellungsweise dieser Nachricht bestehen, klicken Sie hier, um sie im Webbrowser anzuzeigen.
Klicken Sie hier, um Bilder herunterzuladen. Um den Datenschutz zu erhöhen, hat Outlook den automatischen Download von Bildern in dieser Nachricht verhindert.

** CAUTION - email originated from outside the Schaeffler organization

Hello Franziska Stöcker,

On Sunday, March 5, 2023, at 8:04:58 AM CST, you requested to reset your password. You must reset your password on the [Password Reset page](#).

Password Reset

Details

If the [Password Reset page](#) link doesn't work, please copy and paste the following URL into the address bar of your browser:

<https://ids-475b1c9658ab406884d739baea0584a7.identity.oraclecloud.com:443/ui/v1/resetpwd?token=00IQ7tzRY75u7ETIQ7gUu937e0uSJKQL8Z%2Fu%2Bv1pP18%3D>

Important: This link will expire on Sunday, March 5, 2023 9:04:59 AM CST. Also, if you don't recognize this message, contact your system administrator at manuel.schlag@schaeffler.com

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ORACLE Cloud

a611142

franziska.stoecker@schaeffler.com

Reset your password

Set a password for your user account.

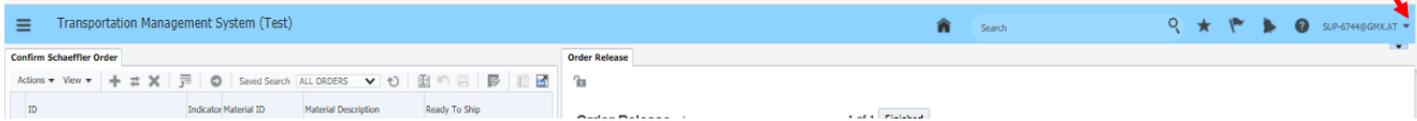
New Password

Confirm New Password

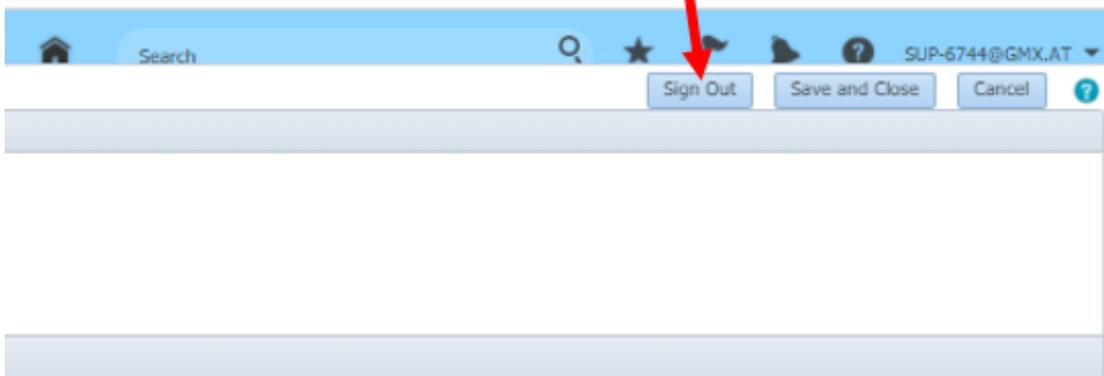


13 How to log-off/sign-out

To sign out click here



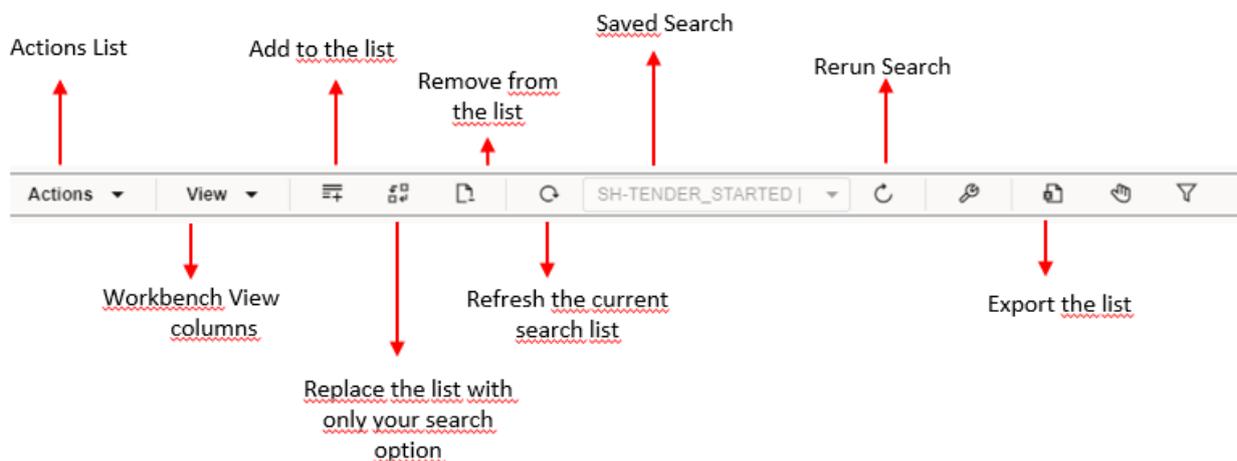
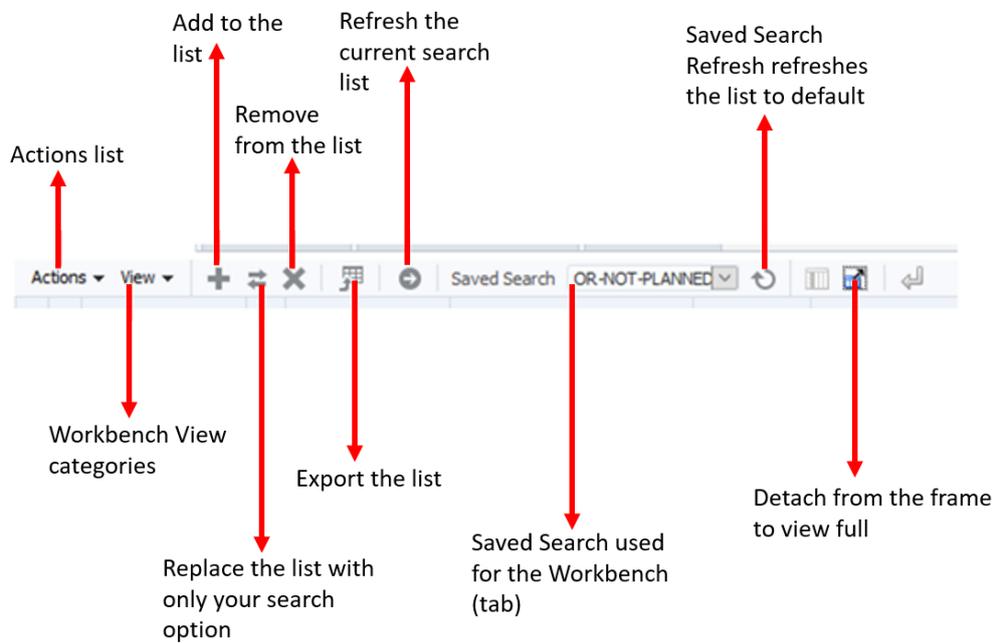
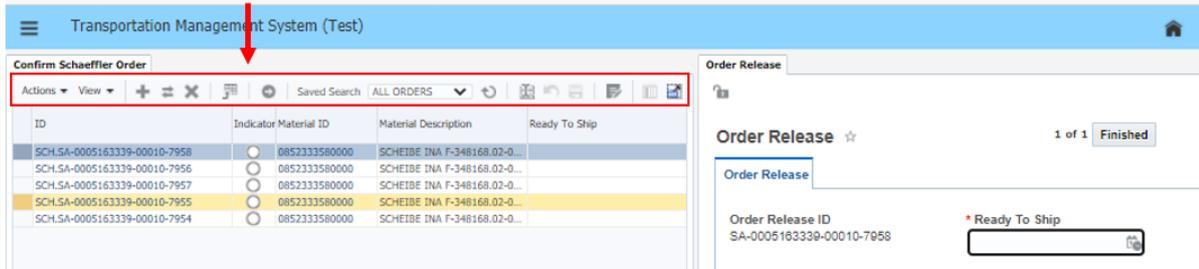
And now click on "Sign Out"



14 Tipps & Tricks

14.1 Explanation of the “Ribbon” and its symbols in “Schaeffler Orders”

Explanation of the “Ribbon” and its symbols in “Schaeffler Orders”



Actions:

Under Actions, the user is enabled to start activities. In the role of the logistics service provider, this concerns the confirmation/rejection of transport orders and the upload of attachments to OTM shipments in the Shipment View application.

View:

Under view you can adjust various settings regarding the screen view to your needs. You can show/hide, move or freeze columns. In addition, it is also possible to display the list in a separate window.

Add:

If you have searched and selected a specific OTM shipment, you can add more OTM shipments to the list by clicking on the plus.

Replace:

Under Replace you can replace the currently displayed list and search for specific OTM Shipments. This feature is very useful for searching OTM shipments individually.

Remove:

With a click on Remove you can remove a selected OTM Shipment from the current list. This disappears only from your current selection, but not from the Workbench.

Export:

The button Export offers the possibility to export the current list or only single OTM Shipments into an Excel file. To do this, you must select the corresponding OTM Shipments.

Refresh:

By clicking Refresh, the currently selected list / OTM Shipments will be updated with regard to its content. The specific selection of shipments is retained.

Saved Searches:

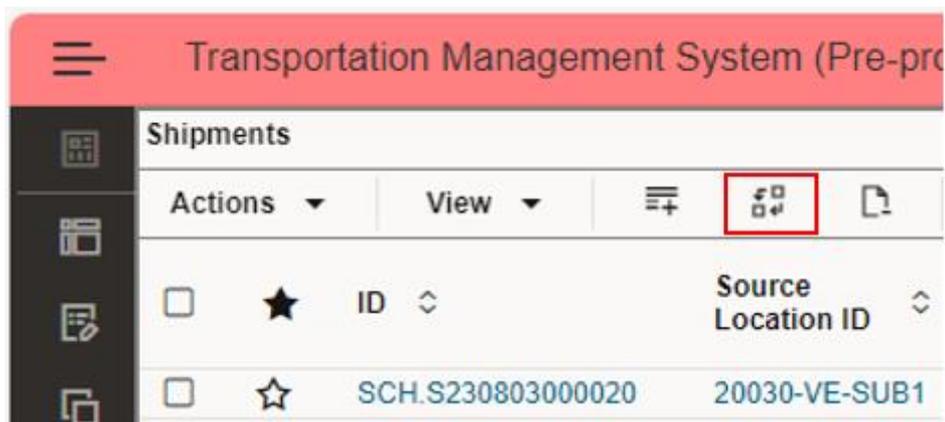
The Saved Searches selection field allows you to quickly switch between different lists without having to set individual parameters under Replace. For the logistics service provider, the saved searches "ALL SHIPMENTS" which shows all shipments in the list, "SH-TODAY_SHIPMENT" which shows the shipments with start/pick-up date today and "SHIPMENT_TENDER_SR_ACCEPTED" which shows all shipments which already have been accepted by the logistics service provider, are available.

3. Search function

The search function in OTM is a central component to filter the required OTM Shipments. There are different search options depending on the workbench. In the Online Booking/Tendering as well as in the Enter Booking Details Workbench the search can be started by clicking on the "New Query" button at the bottom of the window.



In the Shipment Events Workbench the search is started by clicking on the Replace button and then on "New Query".



In the Shipment View Workbench, the search mask is located directly at the start. Entering the search criteria and then clicking on Search starts the search and the output of the results. If no content is entered in the search fields, all available OTM Shipments will be displayed when "Search" is clicked.

Each search has a similar structure. In the search window you can enter the object number. E.g. S231116000005 instead of SCH. S231116000005. The SCH. stands for Schaeffler and is not required in the search. Additionally, you can enter further search criteria.

Attention, each additional search criterion restricts the search.

Select a search specification in the drop-down field next to the object number. The explanations for the individual search criteria can be found here:

- Begins with: If the element begins with a certain word
- Ends with: If the element ends with a certain word
- Is Null: If the element needs to be Null
- Not Null: If the element is not Null
- One Of: If there is more than one criteria and want them all listed
- Not One Of: All the ones apart from the one criteria
- Contains: When only a part of the element is known
- Same As: When you want the exact one

Hint: The search criteria “Contains” is very useful here and promises a great search success.

If the search was successful, the available OTM shipments will be displayed.

Shipments

Finish

Shipment View Total Found: 28 Always Open in New Window

Records 28 of 28 Selected: 1

<input checked="" type="checkbox"/>	☆	ID	Source Location ...	Source City	Source Country Code ID	So
<input checked="" type="checkbox"/>	☆	SCH.S231101000032	0043-SH	STRULLEND...	DE	96
<input type="checkbox"/>	☆	SCH.S231101000034	ATL	ATLANTA	US	
<input type="checkbox"/>	☆	SCH.S231102000018	0029-SH	HIRSCHAID	DE	96
<input type="checkbox"/>	☆	SCH.S231102000019	1AG-BR	1AG	DE	
<input type="checkbox"/>	☆	SCH.S231102000023	373146-VE	CHARLESTON	US	29
<input type="checkbox"/>	☆	SCH.S231102000033	0043-SH	STRULLEND...	DE	96
<input type="checkbox"/>	☆	SCH.S231102000034	1AG-CN	1AG	DE	
<input type="checkbox"/>	☆	SCH.S231102000038	0043-SH	STRULLEND...	DE	96
<input type="checkbox"/>	☆	SCH.S231102000039	1AG-KR	1AG	DE	
<input type="checkbox"/>	☆	SCH.S231102000041	0043-SH	STRULLEND...	DE	96
<input type="checkbox"/>	☆	SCH.S231102000042	1AG-US	1AG	DE	
<input type="checkbox"/>	☆	SCH.S231102000048	0043-SH	STRULLEND...	DE	96
<input type="checkbox"/>	☆	SCH.S231102000049	1AG-CN	1AG	DE	
<input type="checkbox"/>	☆	SCH.S231107000001	287006-VE	JACKSON	US	49

New Query Refine Query Export

To select the OTM Shipment, set the checkmark and click Finish. This will transfer the selected OTM Shipment to the Workbench, where it will be available for editing.

Shipments

Actions View SH-TENDER_STARTED |

<input type="checkbox"/>	☆	ID	Source Location ID	Source City	Source Country Code ID	Source Postal Code
<input type="checkbox"/>	☆	SCH.S231101000032	0043-SH	STRULLE...	DE	96129

If the OTM shipment is not available or an error occurred in the search, you get the message “no data was returned” is displayed.

Buy Shipment

Finish

Buy Shipment

Total Found: 0

No data was returned.

New Query **Refine Query** Saved Query:  **Execute Query**

If you want to change the search without entering all the information again or adding another search criteria, use the “Refine Query” button. Here all the information of your previous searches will be taken over. Clicking “Search” will start the new search with the new/changed search criteria.

The search gives you the results in a list. If there are more than 100 search results, the list is reduced to these 100 results. By clicking on “All”, all results will be displayed.

Always Open in New Window

Records 100 of 113 100 Selected: 0

Source	Destination	Cost	Gross Weight	Gross Volume	Enroute	Status
7629-vE	0007-0099-9e	17 EUR	27 KG	0.07 CUMTR	ENROUTE_NOT STAR	SECURE RESOURCES_NOT STAR
7629-vE	0007-0099-9e	15 EUR	50 KG	0.07 CUMTR	ENROUTE_NOT STAR	SECURE RESOURCES_NO RESP
7629-vE	7791-vE	175 EUR	832 KG	4.50 CUMTR	ENROUTE_COMPLET	SECURE RESOURCES_ACCEPTE
7629-vE	0007-0099-9e	16 EUR	58 KG	0.26 CUMTR	ENROUTE_COMPLET	SECURE RESOURCES_ACCEPTE
7629-vE	7791-vE	335 EUR	117 KG	0.60 CUMTR	ENROUTE_NOT STAR	SECURE RESOURCES_NO RESO
7629-vE	0007-0099-9e	38 EUR	27 KG	0.14 CUMTR	ENROUTE_NOT STAR	SECURE RESOURCES_NOT STAR
7629-vE	7791-vE	48 EUR	63 KG	0.71 CUMTR	ENROUTE_NOT STAR	SECURE RESOURCES_NOT STAR
7629-vE	7791-vE	81 EUR	37 KG	0.14 CUMTR	ENROUTE_NOT STAR	SECURE RESOURCES_NOT STAR
7629-vE	7791-vE	95 EUR	1,277 KG	5.62 CUMTR	ENROUTE_NOT STAR	SECURE RESOURCES_NOT STAR
7629-vE	7791-vE	83 EUR	275 KG	0.91 CUMTR	ENROUTE_COMPLET	SECURE RESOURCES_ACCEPTE
7629-vE	7791-vE	38 EUR	26 KG	0.07 CUMTR	ENROUTE_COMPLET	SECURE RESOURCES_ACCEPTE
7629-vE	7791-vE	38 EUR	26 KG	0.07 CUMTR	ENROUTE_COMPLET	SECURE RESOURCES_ACCEPTE
7629-vE	7791-vE	40 EUR	93 KG	0.48 CUMTR	ENROUTE_NOT STAR	SECURE RESOURCES_NOT STAR
7629-vE	7791-vE	95 EUR	1,277 KG	5.62 CUMTR	ENROUTE_NOT STAR	SECURE RESOURCES_NOT STAR
7629-vE	7791-vE	35 EUR	38 KG	0.42 CUMTR	ENROUTE_NOT STAR	SECURE RESOURCES_NOT STAR
7629-vE	7791-vE	38 EUR	36 KG	0.07 CUMTR	ENROUTE_COMPLET	SECURE RESOURCES_ACCEPTE
7629-vE	7791-vE	48 EUR	63 KG	0.71 CUMTR	ENROUTE_NOT STAR	SECURE RESOURCES_NOT STAR
7629-vE	7791-vE	40 EUR	93 KG	0.48 CUMTR	ENROUTE_NOT STAR	SECURE RESOURCES_NOT STAR
7629-vE	7791-vE	24 EUR	148 KG	0.60 CUMTR	ENROUTE_COMPLET	SECURE RESOURCES_ACCEPTE
7629-vE	7791-vE	81 EUR	37 KG	0.14 CUMTR	ENROUTE_NOT STAR	SECURE RESOURCES_NOT STAR
7629-vE	7791-vE	40 EUR	93 KG	0.48 CUMTR	ENROUTE_NOT STAR	SECURE RESOURCES_ACCEPTE
7629-vE	7791-vE	40 EUR	93 KG	0.48 CUMTR	ENROUTE_NOT STAR	SECURE RESOURCES_ACCEPTE
7629-vE	7791-vE	174 EUR	4,110 KG	18.33 CUMTR	ENROUTE_NOT STAR	SECURE RESOURCES_NOT STAR
7629-vE	7791-vE	179 EUR	3,831 KG	16.86 CUMTR	ENROUTE_NOT STAR	SECURE RESOURCES_NOT STAR
7629-vE	7791-vE	0 EUR	0 KG	0.00 CUMTR		

14.2 Explanation of “Indicators”

All the Indicators and its status that are currently in the system

						
	White	Blue	Yellow	Green	Orange	Red
ORDER	1. Order is Confirmed 2. Order Planning status is changed to Planning_unscheduled	1. Order is Cancelled	1. Order is Modified via Integration 2. Order Planned status changes to any of the below a. Planning_executed - partial b. Planning_planned - final c. Planning_planned - partial	1. Order Planning status changes to Planning_executed - final	1. Order Planning status changes to Planning_planned - failed	
SHIPMENT	1. Shipment is Created	1. Secure Resources - Accepted 2. Secure Resources - Pickup Notification		1. Enroute - Completed 2. Enroute - Enroute 3. Enroute - Unloaded - full 4. Enroute - unloaded - partial	1. Pickup date is modified by LSP, Supplier and Planner (estimated pickup only)	1. Enroute - Delayed 2. Enroute - Diverted 3. Feasibility - Infeasible 4. Secure Resources - Declined

14.3 Getting all search results (Standard: 100 data records at a time)

Buy Shipment Total Found: 113

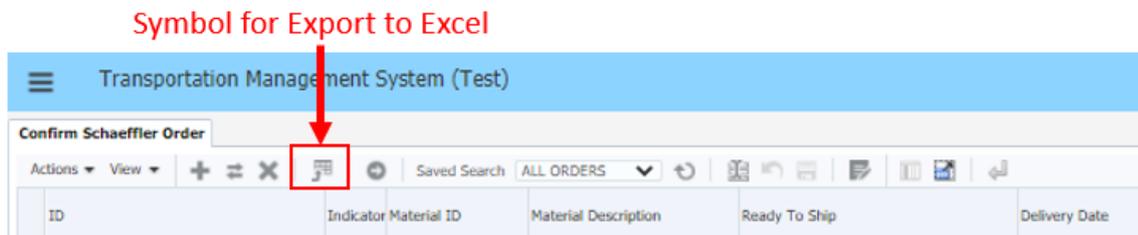
ID	L...	H...	Service Provider ID	Mode	Equipment	Start Date	End Date	Comments	Source	Destination	Cost	Gross Weight	Gross Volume	Enroute	Status
SCH.S2004980000	DHL EXPRESS	PARCEL	VAN	08/04/2020 10:24	Euro...	08/04/2020 1...	7628:VE	0007-0099-SH	17 EUR	27 KG	0.07 CUMTR	ENROUTE_NOT STAR...	SECURE RESOURCES_NOT STAR...
SCH.S2004972000	LPS	PARCEL	VAN	07/04/2020 16:59	Euro...	08/04/2020 0...	7628:VE	0007-0099-SH	15 EUR	50 KG	0.07 CUMTR	ENROUTE_NOT STAR...	SECURE RESOURCES_NO RESP...
SCH.S2004982000	GEIS	TL	SWAP BODY	23/06/2020 12:00	Euro...	24/06/2020 1...	7628:VE	7731:VE	175 EUR	832 KG	4.50 CUMTR	ENROUTE_COMPLET...	SECURE RESOURCES_ACCEPTE...
SCH.S2004988000	LPS	PARCEL	VAN	09/04/2020 08:00	Euro...	09/04/2020 1...	7628:VE	0007-0099-SH	16 EUR	58 KG	0.28 CUMTR	ENROUTE_COMPLET...	SECURE RESOURCES_ACCEPTE...
SCH.S2004922000	GEHERIC	TL	VAN	24/06/2020 09:48	Euro...	24/06/2020 1...	7628:VE	7731:VE	335 EUR	117 KG	0.60 CUMTR	ENROUTE_NOT STAR...	SECURE RESOURCES_NO RESO...
SCH.S2004972000	GEIS	TL	VAN	07/04/2020 15:59	Euro...	07/04/2020 1...	7628:VE	0007-0099-SH	30 EUR	27 KG	0.14 CUMTR	ENROUTE_NOT STAR...	SECURE RESOURCES_NOT STAR...
SCH.S2010980000	GEIS	TL	STANDARD-TL	22/10/2020 16:00	Euro...	23/10/2020 0...	7628:VE	7731:VE	48 EUR	83 KG	0.71 CUMTR	ENROUTE_NOT STAR...	SECURE RESOURCES_NOT STAR...
SCH.S2010920000	FEETZ	TL	VAN	03/07/2020 00:17	Euro...	03/07/2020 1...	7628:VE	7731:VE	81 EUR	37 KG	0.14 CUMTR	ENROUTE_NOT STAR...	SECURE RESOURCES_NOT STAR...
SCH.S2010140000	FEETZ	TL	STANDARD-TL	20/10/2020 23:59	Euro...	21/10/2020 1...	7628:VE	7731:VE	85 EUR	1,277 KG	5.62 CUMTR	ENROUTE_NOT STAR...	SECURE RESOURCES_NOT STAR...
SCH.S2009840000	GEIS	TL	VAN	25/06/2020 15:07	Euro...	26/06/2020 0...	7628:VE	7731:VE	63 EUR	275 KG	0.91 CUMTR	ENROUTE_COMPLET...	SECURE RESOURCES_ACCEPTE...
SCH.S2007390000	GEIS	TL	VAN	13/07/2020 14:07	Euro...	14/07/2020 2...	7628:VE	7731:VE	30 EUR	26 KG	0.07 CUMTR	ENROUTE_COMPLET...	SECURE RESOURCES_ACCEPTE...
SCH.S2007398000	GEIS	TL	VAN	22/07/2020 16:25	Euro...	23/07/2020 2...	7628:VE	7731:VE	30 EUR	26 KG	0.07 CUMTR	ENROUTE_COMPLET...	SECURE RESOURCES_ACCEPTE...
SCH.S2010140000	GEIS	TL	STANDARD-TL	21/10/2020 23:59	Euro...	22/10/2020 1...	7628:VE	7731:VE	48 EUR	83 KG	0.49 CUMTR	ENROUTE_NOT STAR...	SECURE RESOURCES_NOT STAR...
SCH.S2010980000	FEETZ	TL	STANDARD-TL	20/10/2020 23:59	Euro...	21/10/2020 1...	7628:VE	7731:VE	85 EUR	1,277 KG	5.62 CUMTR	ENROUTE_NOT STAR...	SECURE RESOURCES_NOT STAR...
SCH.S2010980000	GEIS	TL	STANDARD-TL	21/10/2020 08:30	Euro...	21/10/2020 1...	7628:VE	7731:VE	35 EUR	36 KG	0.42 CUMTR	ENROUTE_NOT STAR...	SECURE RESOURCES_NOT STAR...
SCH.S2007390000	GEIS	TL	VAN	22/07/2020 23:26	Euro...	23/07/2020 2...	7628:VE	7731:VE	30 EUR	36 KG	0.07 CUMTR	ENROUTE_COMPLET...	SECURE RESOURCES_ACCEPTE...
SCH.S2010980000	GEIS	TL	STANDARD-TL	21/10/2020 10:00	Euro...	21/10/2020 1...	7628:VE	7731:VE	48 EUR	63 KG	0.71 CUMTR	ENROUTE_NOT STAR...	SECURE RESOURCES_NOT STAR...
SCH.S2010140000	GEIS	TL	STANDARD-TL	21/10/2020 23:59	Euro...	22/10/2020 1...	7628:VE	7731:VE	49 EUR	83 KG	0.49 CUMTR	ENROUTE_NOT STAR...	SECURE RESOURCES_NOT STAR...
SCH.S2007390000	GEIS	TL	VAN	18/06/2020 15:11	Euro...	19/06/2020 0...	7628:VE	7731:VE	24 EUR	148 KG	0.09 CUMTR	ENROUTE_COMPLET...	SECURE RESOURCES_ACCEPTE...
SCH.S2007390000	FEETZ	TL	VAN	03/07/2020 10:18	Euro...	03/07/2020 1...	7628:VE	7731:VE	81 EUR	37 KG	0.14 CUMTR	ENROUTE_NOT STAR...	SECURE RESOURCES_NOT STAR...
SCH.S2011020000	GEIS	TL	STANDARD-TL	23/11/2020 23:59	Euro...	24/11/2020 1...	7628:VE	7731:VE	40 EUR	93 KG	0.49 CUMTR	ENROUTE_NOT STAR...	SECURE RESOURCES_ACCEPTE...
SCH.S2011020000	GEIS	TL	STANDARD-TL	23/11/2020 23:59	Euro...	24/11/2020 1...	7628:VE	7731:VE	40 EUR	93 KG	0.49 CUMTR	ENROUTE_NOT STAR...	SECURE RESOURCES_ACCEPTE...
SCH.S2011030000	FEETZ	TL	STANDARD-TL	25/11/2020 23:59	Euro...	26/11/2020 1...	7628:VE	7731:VE	174 EUR	4,110 KG	18.33 CUMTR	ENROUTE_NOT STAR...	SECURE RESOURCES_NOT STAR...
SCH.S2011030000	FEETZ	TL	STANDARD-TL	20/11/2020 23:59	Euro...	23/11/2020 1...	7628:VE	7731:VE	179 EUR	3,831 KG	16.86 CUMTR	ENROUTE_NOT STAR...	SECURE RESOURCES_NOT STAR...
Total											0 EUR	0 KG	0.00 CUMTR		

Click on All to view all the search Results

Each Search result screen display 100 elements at a time. If there are more and click all to see it on the screen.

14.4 Export to Excel

Everywhere you see this symbol



or a button with "Export" by clicking on it you can export the data to Excel.

<input type="checkbox"/>	+	SCH.SA-010020210322-0020-0001	⚠	18/03/2021 23:59...	18/03/21
<input type="checkbox"/>	+	SCH.SA-0005171835-00010-1067	⚠	18/03/2021 07:30	18/03/21
Total					

Export

Button for Export to Excel

15 Special Terms & Abbreviations

LSP:

Logistics Service Provider

OR (Order Release):

The standard object for Transportation Demand is the Order Release in OTM which is the basis for shipment planning. An order release represents the transportation requirements for the movement of goods.

OTM:

Oracle Transport Management (The specific name of the TMS used by Schaeffler).

Shipment:

A shipment in OTM is the result of operational planning where transport demands (order releases) are planned and optimized. Example: one truck with 5 transport demands going from A to B is one shipment.

Ship Unit(s):

Same meaning as Handling Units.

Term of OTM which means a single unit like a colli, with length, width, height and weight which is calculated based on material number, material quantity and packaging instructions.

THU (Transport Handling Unit):

Represents the object used to hold the goods during transportation, e.g. a pallet.

TMS:

Transport Management System

16 Example Email Notification to Supplier

16.1 Example: Email Notification in case a new order is transferred from Schaeffler SAP to TMS for a supplier

Instruction **You are registered to receive notifications regarding order status information. This email contains order information and the current status update.**

Event **Order SA-0005163339-00010-7967 - Please Log on to Supplier WebApp as New Order has been created**

Message Severity **Informational**

Order ID and Reference Number

ID	SCH.SA-0005163339-00010-7967	
	Reference Number Qualifier	Reference Number Value
	GLOG	SCH.SA-0005163339-00010-7967
	PO	0005163339-00010
Reference Number	SCH.COMPANY_CODE	0060
	SCH.ORDER_TYPE	SA
	SCH.PO_DOCUMENT_CATEGORY	L
	SCH.PURCHASING_ORG	0060
	SCH.TRANSPORT_COST_TYPE	STANDARD
	SCH.VENDOR	6744-VE

Order Information

Origin Name **EMIL HEMBECK GMBH & CO. KG**

Origin Location **LÜDENSCHIED, 58509 DE**

Dest Name **SPEDITION PFLAUM GMBH**

Dest Location **STRULLENDORF, 96129 DE**

Time Windows

Pickup From	To	
Delivery From	To	2021-04-21 23:59:59 Euro-

pe/Berlin

Product Information

Release Total Quanti- ties	Total Weight	Total Volu- me	Total Ship Unit Count	Total Packaged Item Count
			0	0

Table Name	Primary Key	Action	Details	
			Column Name	Before After
OrderRelease	SCH.SA- 0005163339- 00010-7967	CREATE	sourceLocationGid	SCH.6744-VE
			isLocStale	false
			totalDeclaredValue	0.0 EUR
			termLocationText	LÜDENSCHIED, INCOTERMS 2010
			mustShipThruPool	false
			inspectionRequired	MAY BE REQUI- RED
			isConsolidateOrEquipment	false
			totalItemPackageCount	80000
			planToLocationGid	SCH.7791-VE
			orderReleaseGid	SCH.SA- 0005163339- 00010-7967
			isKnownShipper	false
			lateDeliveryDate	2021-04-21 23:59:59 Euro- pe/Berlin
			onRtExecution	false
			locAmount	0.0 EUR
			releaseMethodGid	SCH.SCHAEFFLER
			mustShipThruXDock	false
			mustShipDirect	false
deliveryIsAppt	false			
orderReleaseXid	SA-0005163339- 00010-7967			

			isLocRequired		false
			bundlingType		AUTOMATIC
			shipUnitOrigin		RL
			importLicenseRequired		MAY BE REQUIRED
			isTopoff		false
			orderReleaseTypeGid		SCH.PURCHASE-ORDER
			priority		1
			dutyPaid		NA
			destLocationGid		SCH.0007-0099-SH
			planFromLocationGid		SCH.6744-VE
			totalPackagingUnitCount		0
			isTemplate		false
			pickupIsAppt		false
			incoTermGid		FCA
			customerUnitizationRequest		false
			isSplittable		false
			domainName		SCH
			timeWindowEmphasisGid		BOTH
			otmVersion		6.0
			attribute2		0007
			isPreEnteredPu		false

[URL](#)

[OTM Order Release Manager](#)

16.2 Example of an Email Notification to a Supplier after an order was planned for transportation to inform about the concrete LSP and when the LSP will come to pick-up

Shipment Information			
Carrier Contact Information			
Carrier Name	Test LSP	Contact Name	
Contact Fax		Contact Phone	
Contact E-mail	OR-HZA-tm-global@schaeffler.com		
Shipment Details			
Shipment Reference ID	S210325000002		
Pick-Up Stops Total	1	Delivery Stops Total	1
Transport Mode	TL	Total Distance	381_KM
Requested Equipment	STANDARD-TRAILER		
Hazardous Goods	N	Count of Handling Units TOTAL	4
Temp Controlled	N	Shipment Planned Weight	1540_KG
Count of Orders	3	Shipment Planned Volume	0.61_CUMTR
Delivery Instructions			
Order ID	Instructions		
Stop Sequence Overview			
Shipment Reference ID	S210325000002		

+											
Location ID		Arrival Time	Departure Time	Address		Contact Name			Contact Phone		
299333-VE		2021-03-26 15:00 Europe/Prague	2021-03-26 17:00 Europe/Prague	Test Supplier 1 Test City DE		299333					
Activity	Transport Handling Unit	Count	Total Weight	Ship Unit Weight	Total Volume	Ship Unit Volume	Length	Width	Height	Order ID	Ship Unit ID
PICK UP	ONE-WAY-HALF-PAL-800X60 OMM	2	907 KG	454 KG	0.31 CUM TR	0.15 CUM TR	800.00 MM	600.00 MM	320.00 MM	SA-0005169 427-00010-5016	SA-0005169 427-00010-5016-001
PICK UP	ONE-WAY-HALF-PAL-800X60 OMM	1	454 KG	454 KG	0.15 CUM TR	0.15 CUM TR	800.00 MM	600.00 MM	320.00 MM	SA-0005169 427-00010-5017	SA-0005169 427-00010-5017-001
PICK UP	ONE-WAY-HALF-	1	179 KG	179 KG	0.15 CUM TR	0.15 CUM TR	800.00 MM	600.00 MM	320.00 MM	SA-0005171 835-	SA-0005171 835-

Stop 1