

Using Logistics Dashboard ~ for Freight Forwarders

Quick Reference Guide



Using this quick reference guide assumes that you have obtained a Covisint id and password

Requesting the Logistics Dashboard Application

1. Log in to www.covisint.com
2. Click **Administration Tools** from the left menu bar.
3. Click **Request a Service Package**.
4. Click the **Request** button next to Logistics Dashboard.
5. If required, key in additional information, then click **Request**. You will be contacted via email when your request has been approved by your administrator.

RESULT: You have successfully requested Logistics Dashboard.

Logging in to Logistics Dashboard

1. Navigate to www.covisint.com
2. Key in your User Name and Password, then click **Login**.
3. Click **Logistics Dashboard** from the My Applications menu.

RESULT: You have successfully logged in to Logistics Dashboard.

Setting Your Language and Time Zone Preferences

1. From the Logistics Dashboard view, click **Preferences** tab.
2. From the drop-down menu, select the language in which you wish to view the dashboard.
3. From the drop-down menu, select the time zone in which you are working.
4. Click **Save**.

RESULT: You have successfully configured your preferences.

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Viewing the Materials Summary Tab

- From the Logistics Dashboard view, click **Materials Summary** tab.

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Material Summary Transportation Summary Shipment Detail Preference Administration

Covisint Logistics

Material Summary Search

Part Number: Ship-To:

Supplier/DUNS Number: From Date/Time Imported:

Shipping Schedule: To Date/Time Imported:

Material Summary Search Results

Viewing 1 - 1 of 1 Show 30 Results per page

Part Number	Supplier	DUNS Number	Shipping Schedule	Date	Plant	Transit	Past Due Quantity	Months				
								Dec 06	Jan 07	Feb 07	Mar 07	Apr 07
16245102	DELPHI DELCO ELECTRONICS SYSTEMS	000124727	026100	10/01/2006	72479	0	0	0	50	0	50	0

Viewing 1 - 1 of 1 Show 30 Results per page



From this screen, a Freight Forwarder is able to verify status of parts history or parts in transit. The Freight Forwarder may also check this screen find the due date of a part in transit. This is accomplished by searching for a supplier sending certain part number destined for a given plant.

- Optionally, key in search criteria such as Part Number, Supplier/DUNS number, Ship To, From date and time imported, To date and time imported. Note: The date field is not open. You must select the date from the calendar icon.
- Click **Search**. The search results are displayed. At this point you are able to view delivery schedules.

RESULT: You have successfully viewed the Materials Summary tab.

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Viewing Transportation Summary

- From the Logistics Dashboard, click **Transportation Summary** tab.

Transportation Summary Search

Shipper Number: Ship-To:

Milestone:

From Date/Time Imported: 1:00 AM

To Date/Time Imported:

Transportation Summary Search Results

Viewing 1 - 4 of 4

Milestone	Description	Shipper Number	Ship Type	Planned Arrival	Actual Arrival	Final Destination	Details
<input type="checkbox"/> 1		999999-111306	Ocean	12/05/2006			
<input type="checkbox"/> 4		999999-111307	Ocean	12/05/2006		11/30/2006	
<input type="checkbox"/> 4		999999-111309	Air	12/05/2006		12/01/2006	
<input type="checkbox"/> 2		999999-111308	Ocean	12/05/2006			

Viewing 1 - 4 of 4

History Option: Status Option:

Set milestone filters by selecting the milestone in column 1, then click **Add->**. The milestone filter is set in the column 2. Repeat as desired.



From this screen, a Freight Forwarder is able to search for shipments using search criteria, such as:

- Milestones: Viewing current milestone status and associated dates provides an instant view of whether expected shipments are in synch with planned arrival dates.
- Can indicate what shipments are in-transit and which shipments may need expediting.

Proceed to the next page for work steps regarding the Transportation Summary screen

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Viewing Transportation Status

- From the Logistics Dashboard, click **Transportation Summary** tab.

Transportation Summary Search

Shipper Number: Ship-To:

From Date/Time Imported: 1:00 AM

To Date/Time Imported:

Column 1 Milestone:

Column 2

Transportation Summary Search Results

Viewing 1 - 4 of 4 Show 10 Results per page

Milestone	Description	Shipper Number	Ship Type	Planned Arrival	Actual Arrival	Final Destination	Details
<input type="checkbox"/> 1		999999-111306	Ocean	12/05/2006			
<input type="checkbox"/> 4		999999-111307	Ocean	12/05/2006		11/30/2006	
<input type="checkbox"/> 4		999999-111309	Air	12/05/2006		12/01/2006	
<input type="checkbox"/> 2		999999-111308	Ocean	12/05/2006			

Viewing 1 - 4 of 4 Show 10 Results per page

History Option: Status Option:

- Optionally, key in search criteria such as Part Number, Supplier/DUNS number, Ship To, Ship From date and time imported, To date and time imported. You must select the date from the calendar icon.
- Click **Search**. The search results are displayed.
- Enable the checkbox of the item you wish to view.
- Perform one or more of the following:

If you wish to...	Then...
Manually change milestone data	<ol style="list-style-type: none"> Click on the hyperlinked number in the Shipper Number column. Proceed to the section of this guide entitled <i>Manually Changing Milestone Data</i>.
View a historical summary view	<ol style="list-style-type: none"> Click Summary View. Proceed to the section of this guide entitled <i>Viewing Shipment Summary History</i>.
View shipment details / parts summary	<ol style="list-style-type: none"> Click Part View. Proceed to the section of this guide entitled <i>Viewing Shipment Details / Parts Summary</i>.
Increase a milestone	<ol style="list-style-type: none"> Click Increase Milestone. Confirm increase by clicking OK.

RESULT: You have successfully viewed transportation status.

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Manually Changing Milestone Data



From this screen a Freight Forwarder is able to view part detail for the shipper number, change data elements (as configured by the Buyer during Setup phase) for milestones, and to:

- Delete Shipments (ASNs) for milestones 0,1, or 2 as needed.
- Add notes

1. From the Transportation Summary tab, click on the *Shipper Number hyperlink* to view the details screen.
2. Modify any of the open text fields as you wish, if authorized to do so. Fields are configured for you during initial setup by the Buyer Company Administrator. If a field is not editable for you, it has been configured that way by the Buyer Company Administrator and is not an error.
3. Click **Update**.
4. Optionally, you may scroll to the bottom of the screen to view Part Level Detail.

RESULT: You have successfully changed milestone data.

Deleting Shipments (ASN) for Milestones ≤ 0, 1, 2

1. From the Logistics Dashboard view, click **Shipment Details** tab.
2. Key in the Shipper Number in the open text field.
3. Click **Search**.
4. Click on the *Shipper Number hyperlink* to view the details screen.
5. Click **Delete**.
6. Click **OK** to confirm that you wish to delete.

RESULT: You have successfully deleted shipments for milestones ≤ 0, 1, 2

Adding a Note to the Shipment Details Screen

1. From the Shipment Details screen for a given shipper number, click **Notes**.
2. Key in the text in the “note” window, then click **Save**.

RESULT: You have successfully added a note to the shipment details screen.

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Viewing Shipment Summary History



From this screen, a Freight Forwarder is able to check data about selected shipment(s) such as the last status update date, and the user that performed the update (in response to Supplier and Buyer questions on status). Freight Forwarder may also view details in response to delays or errors that were experienced in the shipping lane processes, such as:

- finding Reload Container Numbers/ Conveyance, etc.
- finding Bills of Lading numbers

1. From the Logistics Dashboard view, click **Transportation Summary** tab.
2. Enable the checkbox of the item you wish to view.
3. Click **Summary View**. An historical view of shipment details for the selected shipper number is displayed.
4. Optionally, sort the results displayed by clicking  in the column header.

RESULT: You have successfully viewed shipment summary history.

Viewing Shipment Details / Parts Summary



From this screen, a Freight Forwarder is able to determine if a part number were contained in a shipment as well as the stated quantity of that part (in response to questions from Supplier or Buyer or members of Buying Company).

1. From the Logistics Dashboard view, click **Shipment Details** tab.

RESULT: You have successfully viewed shipment details / parts summary.