



a. hartrodt
TRANSPORT IS OUR BUSINESS

DARF MAN DAS?

ESM als Address Maintenance Portal

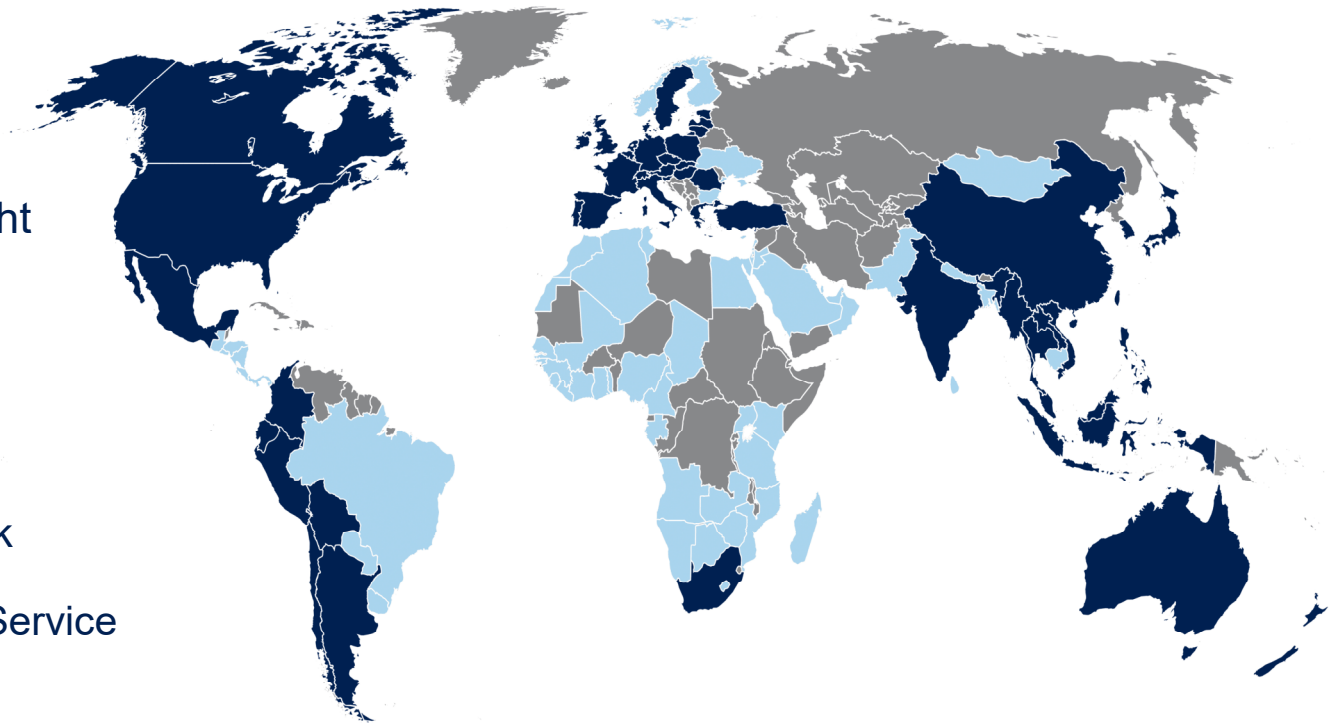
Tim Jost & Christopher Brandt
04.12.2024

A. HARTRODT - TRANSPORT IS OUR BUSINESS

- 1887 in Hamburg gegründet
- über 2000 Mitarbeiter in 47 Ländern
- Logistik Dienstleister in Luft - & Seefracht

Über mich:

- Seit 2015 als Werkstudent im Service Desk
- Ab 2021 Consultant for Software Asset & Service Management
- Betreuung unserer ESM Instanzen und Umsetzung von Projekten



- a. hartrodt offices
- a. hartrodt partners
- no representation

01

VORBEREITUNG

Warum machen wir das?



AUSGANGSLAGE – DEZENTRAL UND UNSTRUKTURIERT

- Anfragen per E-Mail an lokal Verantwortliche
- Kundendaten global über Weboberfläche verwaltet und gehalten
- Eingeschränkte Administrationsmöglichkeiten
- inkompatibel mit neuer Transport Management Software Datenbank
- Mangelhafte Dokumentation

Edit company address

Company name	<input type="text"/>	Picture URL:	<input type="text"/>
Street / street no.	<input type="text"/>		
Zip code / town	<input type="text"/>		
State	<input type="text"/>	Suburb	<input type="text"/>
P.O.Box / P.O.Box zip	<input type="text"/>	P.O.Box town / P.O.Box state	<input type="text"/>
Country symbol / Country	<input type="text"/>		<input type="text"/>
Delivery address	<input type="text"/> (Name)		
	<input type="checkbox"/> Remove delivery address		
Phone	<input type="text"/>	Fax	<input type="text"/>
Email	<input type="text"/>	Web address	<input type="text"/> http://
Industry	<input type="text"/> 01 please select an industry	Number of employees	<input type="text"/>
Customer Number	auto	Turnover	<input type="text"/>

ANFORDERUNGEN – ZENTRAL UND STRUKTURIERT



- Globales Portal für Anfragen
- Zentral durch ein Team verwaltet
- Dokumentation aller Vorgänge
- Dynamische & Nutzerfreundliche Eingabemaske
- Validierung von Eingaben
- Inhouse Administration des Systems

WARUM EINE EIGENE ESM INSTANZ?

- Analyse verschiedener System, die wir bereits nutzen
 - z.B. SharePoint, M42 ESM
- Erste Idee das als Service in IT System zu hinterlegen, aber:
 - saubere Abtrennung ist aufwendig
 - Die Prozesse passen eher zu der Handhabung von Tickets, als Services
 - Customizing Wünsche konträr zu IT Anforderungen
 - Stabilität und Wartung
 - Rückbau?

The image shows a screenshot of a web form for address maintenance. The form is divided into several sections:

- Full Name:** A text input field with a red error message below it: "The field is mandatory".
- Address:** A large text input field with a red error message below it: "The field is mandatory".
- Additional Address Information:** A text input field.
- Country:** A dropdown menu with "All Countries/Regions" selected, and a "State" text input field.
- Post Code:** A text input field with a red error message below it: "The field is mandatory".
- City:** A text input field.
- Phone:** A text input field.
- Fax:** A text input field.
- E-Mail:** A text input field.
- Website URL:** A text input field.
- Service Type:** A text input field.
- Organization Types:** A text input field.
- Business Type:** A text input field with "Company/Business" selected.
- UN/LOCODE:** A text input field with a tooltip below it: "Has to be five characters, only number and Capital Letters are allowed".
- Registration Number Type:** A text input field.
- Registration Number:** A text input field.
- VAT Number:** A text input field.
- Controlling Branch:** A text input field.
- Sales Representative:** A text input field.

At the bottom of the form, there are two tabs: "New Tab" (selected) and "Tab 2".

Local Company Name: A text input field.

Local Address: A large text input field.

Local Country: A text input field.

Local City: A text input field.

Local Post Code: A text input field.

Local State: A text input field.

Contact Name: A text input field.

Contact Job Title: A text input field.

Contact Fax: A text input field.

DAS PROJEKT AUS LMBIT SICHT

- Wirklich die grüne Wiese
- Gute Vorbereitung durch a. hartrodt
 - Projektablaufpläne
 - Fachliche Ansprechpartnerin Teil des Projektteams
- Kreativer Freiraum, da keine Nachfolgeprojekte berücksichtigt werden müssen
- Umdenken der Prozesse war eine Herausforderung



02

DURCHFÜHRUNG

Was haben wir getan?

FRONTEND

- Ausgangslage sind vier Fälle
 - Activity CIs ohne Task und Change
 - Custom Dialog für jeden Fall
 - Auf Standardprozesse aufgebaut

Address Maintenance Portal Home

Search in Navigation

- Home
- Requests
- Support
- AMP Homepage

Ticket **Incident** **SerReq** **Problem**

NEW
New Address

Select this option, if you want to request a **new address**, which can't be found in your actual TMS.

Amend an existing Address

Select this option, if you want to request an **amendment or transfer to CW1 PRD** for an address, which is already existing in your actual TMS.

Sales

Select this option, if you want to request any **sales related changes** to an existing address or organization.

Other

Select this option, if you have a **general question** about an address or the AMP itself.

Update Note: 06.06.2024

In order to see all changes, you might need to reload the page (F5) and/or delete your browser cache.

NEW || Replaced freetext State field with predefined list

To further improve the overall Data Quality, you can now choose from a predefined list of States. The List is directly imported from CargoWise One.

You can enter one of the following criteria into the State field to search:

- CW1 State Code
- State Name
- Country Name

Operating Hours of the Data Entry Team

General organizations: Mon 04:00 - Sat 08:00 PHST
Global carrier: Mon - Fri 08:00 - 16:00 CE(S)T / MYT

FRONTEND

- Ausgangslage sind vier Fälle
 - Activity CIs ohne Task und Change
 - Custom Dialog für jeden Fall
 - Auf Standardprozesse aufgebaut

- Und wenn es doch mehr werden, baut man sie einfach
 - Größter Aufwand ist Anpassen der Dialoge
 - „It just works“

Address Maintenance Portal Home

Search in Navigation

- Home
- Requests
- Support
- AMP Homepage

Ticket	Incident	SerReq	Problem	???
 New Address	 Amend an existing Address	 Sales	 Other	 Standalone Compliance Check (DPS)
Select this option, if you want to request a new address, which can't be found in your actual TMS.	Select this option, if you want to request an amendment or transfer to CW1 PRD for an address, which is already existing in your actual TMS.	Select this option, if you want to request any sales related changes to an existing address or organization.	Select this option, if you have a general question about an address or the AMP itself.	Select this option, if you need to screen an address/vessel against sanctions lists.

Update Note: 06.06.2024

In order to see all changes, you might need to reload the page (F5) and/or delete your browser cache.

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DIALOG – NEUE ADRESSE

Address Type

Address Category
Business

Address Type
Shipper

Notify Users

First, choose the correct **Address Category** for the address you want to request.
Secondly, choose the correct **Address Type** that describes the to-be-requested address best.
Depending on the first two choices, a third level drop-down-menu might appear. Choose the correct option accordingly.
Please proceed to fill the address information into the respective fields.
Keep in mind the **main fields will only accept latin characters**. Proceed to use the translated address function in addition to the latin one if you require a non-latin version to be entered.
To add **contact person information**, click the respective checkbox. The corresponding fields will pop up for you to fill in the necessary information.
To add **local language address information**, click the respective checkbox. The corresponding fields will pop up for you to fill in the necessary information.
If you want to speed up the verifying process, attach a document, screenshot or corresponding e-mail next to the "comments" field.
If you want to enter additional information without a respective field, please enter it into the "Comments" Field below.
Click "Save" or "Done" to send the request.

Definition of Official Agents/Intercompany

Intercompany: a. hartrodt office

Official agent: [current list of agents](#)

Address Data

Full Name
The field is mandatory

Address
The field is mandatory

Postcode
The field is mandatory

City
The field is mandatory

Suburb

State

Country
The field is mandatory

Phone
Format: +1 212 456 7890

Fax
Format: +1 212 456 7890

E-mail
non-personalised e-mail (e.g. info@example.com)

URL
link to homepage, e.g. https://www.example.com

Business Registration Number Type
insert Type of number (e.g. VAT, USCI, ABN, NIT, GST); max. 10 characters

Business Registration Number
insert full Registration Number

WICE CRM: Office
The field is mandatory

Remarks / Notes

Add Contact Person

Add Translated Address

Contact Person Details

Contact Name
The field is mandatory

Contact Job Title
Role/Department of Contact Person

Contact Email
The field is mandatory

Contact Workphone
direct dialing phone, format +1 212 456 7890

Contact Mobile Phone
mobile phone, format +1 212 456 7890

Contact Fax

Full Name The field is mandatory

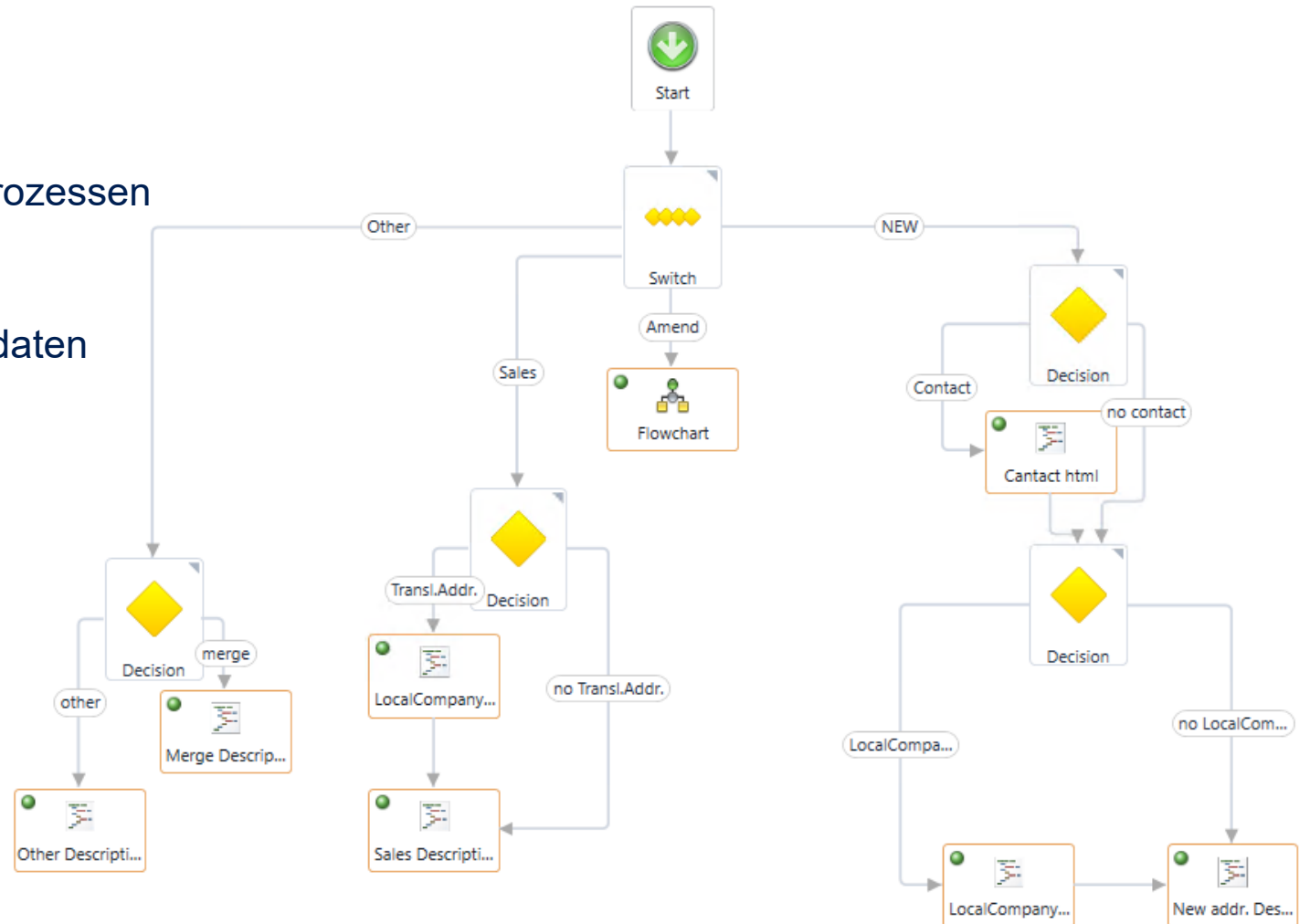
CANCEL SAVE DONE

KONFIGURATION – ZUWEISUNG AN ROLLEN

<input type="checkbox"/>	Organisati...	Shipper Type	Organi...	Forwarder Agent Type	Logistics Services	Carrier Type	Amend Existing Address Optio...	Recipient Role
<input type="checkbox"/>	Q	Q	Q	Q	Q	Q	Q	Q
<input type="checkbox"/>								Tax Authority
<input type="checkbox"/>								Group Accounting
<input type="checkbox"/>							Add translated address	Compliant Business Processing
<input type="checkbox"/>							Add contact person	Compliant Business Processing
<input type="checkbox"/>		Shipper						Compliant Business Processing
<input type="checkbox"/>		Consignee						Compliant Business Processing
<input type="checkbox"/>		Broker						Compliant Business Processing
<input type="checkbox"/>		Warehouse						Compliant Business Processing
<input type="checkbox"/>				CFS				Compliant Business Processing
<input type="checkbox"/>		Forwarder						Compliant Business Processing
<input type="checkbox"/>				Air CTO				Compliant Business Processing
<input type="checkbox"/>				Sea CTO / Stevedore				Compliant Business Processing
<input type="checkbox"/>				Rail Head / Depot				Compliant Business Processing
<input type="checkbox"/>				Road Depot / Transit Shed				Compliant Business Processing
<input type="checkbox"/>				Ferry / Inland Water Terminal				Compliant Business Processing
<input type="checkbox"/>				Container Yard				Compliant Business Processing
<input type="checkbox"/>				Fumigation contractor				Compliant Business Processing
<input type="checkbox"/>						Line Haul		Compliant Business Processing
<input type="checkbox"/>						Trucking Company / Road Transp...		Compliant Business Processing
<input type="checkbox"/>						Rail		Compliant Business Processing
<input type="checkbox"/>							Other changes	Compliant Business Processing

BACKEND

- Orientierung an M42 Standard Prozessen
 - Gehärtet gegen „Falschbenutzung“
- Eine Daten Definition mit Adresdaten
- Nur 21 Custom Workflows
 - 13 Aktionen
 - 8 Konformitätsregeln





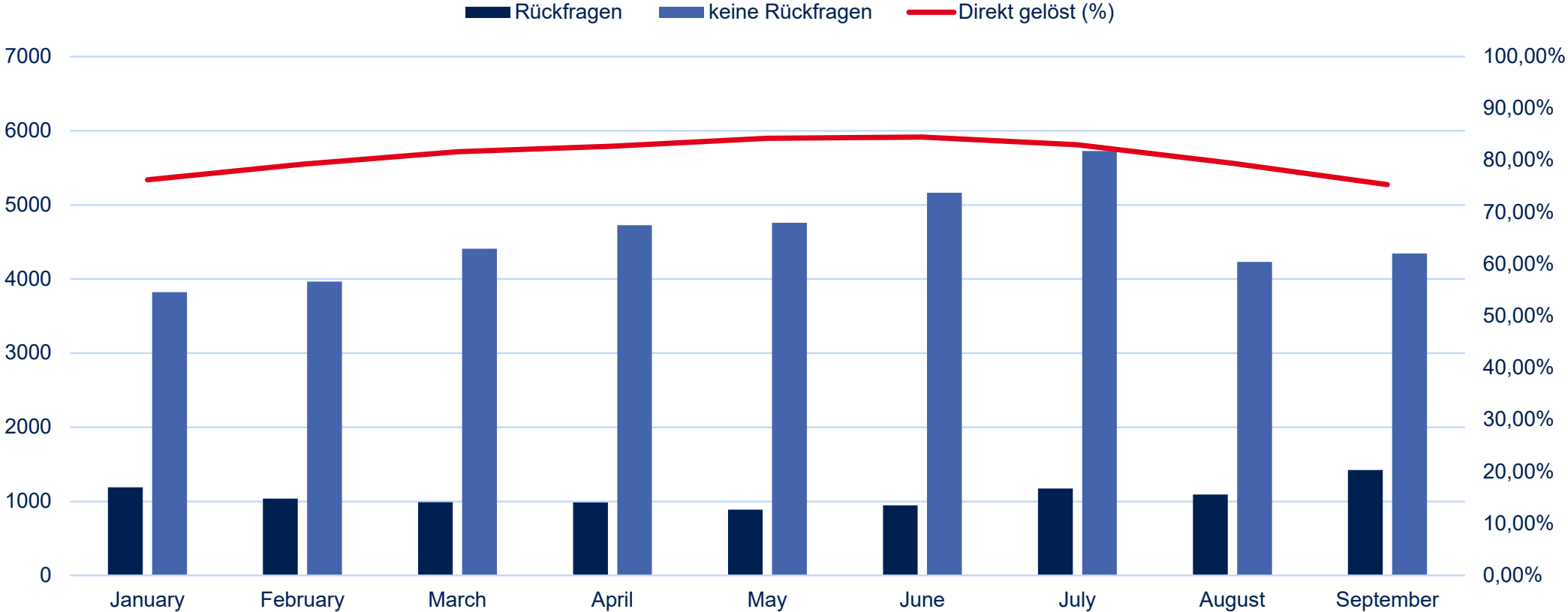
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03

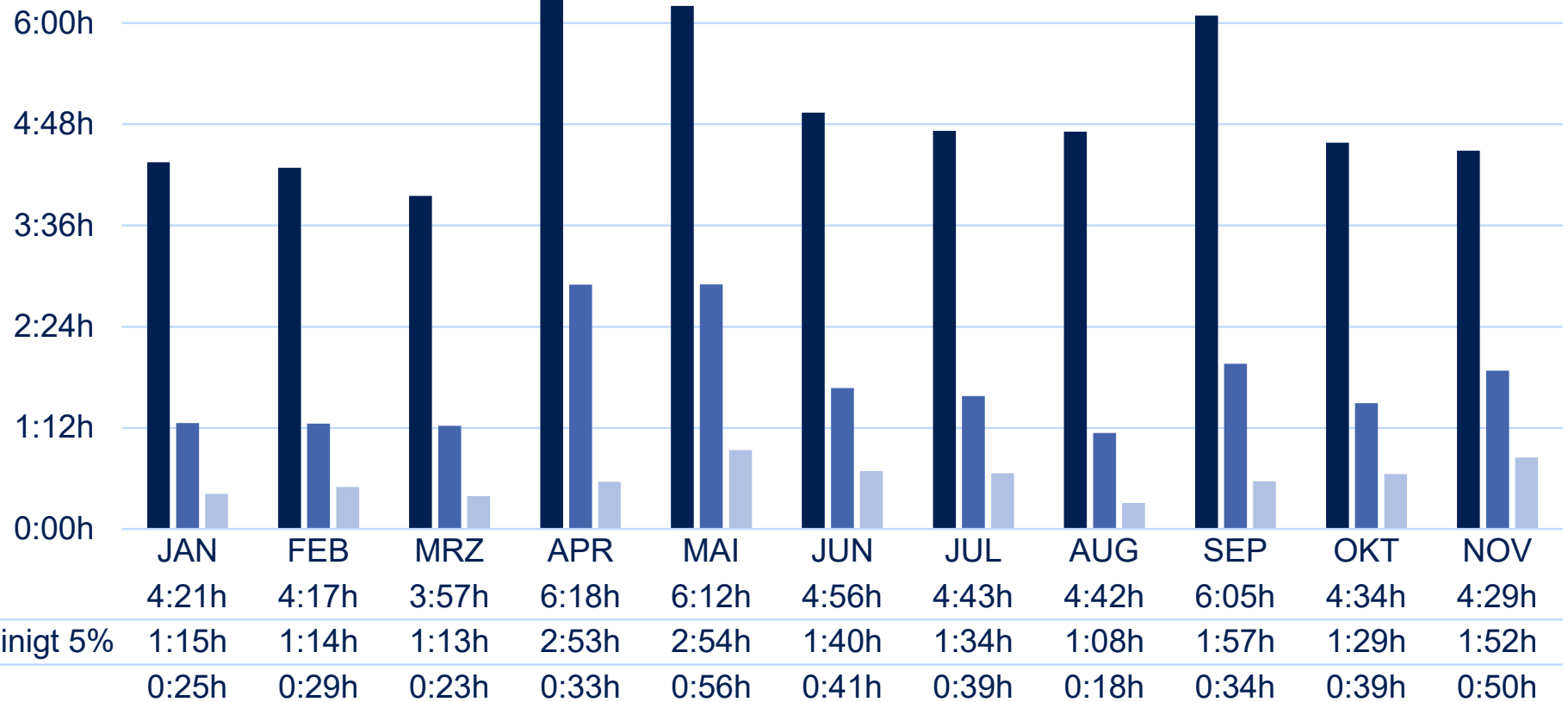
RÜCKBLICK

Was hat es gebracht?

FIRST SHOTS - 2024



TIME TO SOLVE



FEEDBACK DER ANWENDER



- + Einfache Einarbeitung neuer Kollegen
- + Bedienung durch die Aktionsknöpfe selbsterklärend
- + Geringer Dokumentationsaufwand
- + Schnelles abarbeiten von Anfragen durch Vorlagen

- Kollegen sind manchmal zu schnell für Konformitätsregeln
- Teils unterschiedliche Handhabung zum IT ESM Portal



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