

# COMPASS Procedure

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## Contents

- [Introduction](#) ..... 1
- [Procedure step-by-step](#) ..... 1

## Introduction

This procedure has as main objective, providing all the newcomers in the Purchasing family with the necessary accesses related to the purchasing function, covering the purchasing tools, such as CONVERGENCE / SATT / ARIBA / SPRINT / QV / VWF registered in the online google sheet "COMPASS" in the link below:

[https://docs.google.com/spreadsheets/d/1\\_PhPnMKiXuEi9pzPofH-nLLzkqj6f3LudtsWgiSnxbg/edit#gid=0](https://docs.google.com/spreadsheets/d/1_PhPnMKiXuEi9pzPofH-nLLzkqj6f3LudtsWgiSnxbg/edit#gid=0)

Besides, this procedure can also being used with the objective of removing accesses of people who are about to leave the company, or function.

## Procedure step-by-step

1. In order to be initiated, there must be a request registered by the Purchasing Process Leader, Performance Managers or their Delegates, in COMPASS for a certain new member in the purchasing family
1. This request, must be verified and approved by the Purchasing Process Leader, who creates a ticket directed to the group PtP D&A Purchasing Tools, entitled by "Compass > Name of the Requester"
1. When receiving this ticket entitled by "Compass > Name of the Requester", the group PtP D&A Purchasing Tools (L1) must consult the google sheet COMPASS through the link above, to verify one-by-one the accesses previewed for addition/removal to the concerned new member/leaver, in function of the concerned purchasing tool (CONVERGENCE / SATT / ARIBA / SPRINT/QV / VWF).
1. After consulting this google sheet COMPASS, the group must proceed with the addition/removal of the accesses accordingly:
  - For the purchasing tools administrated by PtP D&A Purchasing Tools (CONVERGENCE / SATT/ ARIBA) the group PtP D&A Purchasing Tools must proceed directly with the addition or removal of the concerned accesses, and testing the accesses in order to make sure that it is working smoothly.

- For the purchasing tools administered by other groups (SPRINT / QV / VWF) the group PtP D&A Purchasing Tools must create one ticket per tool accordingly to what is previewed in COMPASS, by recurring to the Freshdesk function “new ticket”, or “clone ticket” (being preferable to use the option “clone ticket” since it allows to keep the approval of the Purchasing Process Leader registered in the clone ticket). This newly created clone ticket must be then redirected by the group PtP D&A Purchasing Tools, to the concerned groups in Level 2 (L2), accordingly to the “Escalation procedures in Freshdesk” in the link below:

note: inform the L2 to not inform the customer about the access. Only the requester (agent from PtP D&A Purchasing Tools).

<https://drive.google.com/open?id=0B9zD4aWragfLYWdEd3otaXZQS2s>

1. In order to make sure that all the accesses initially previewed in COMPASS are effectively provided, the group PtP D&A Purchasing Tools must follow up the newly created clone tickets through the email box in the quality of “requester”, being therefore informed by the concerned group once accesses were provided to the new member (in order to close the clone ticket).
1. For finishing this procedure, when the group PtP D&A Purchasing Tools makes sure that all the accesses initially previewed in COMPASS were effectively provided, it is necessary to welcome the new member by forwarding a message (with the Purchasing Process Leader and Performance Manager in copy) within the COMPASS ticket initially created by the Purchasing Process Leader, containing the list of accesses provided together with the “Welcome Package” link which is below:

<https://drive.google.com/open?id=1WWWl3FwSBzRyphu5ILwyKgBba4vsuJXN2cPtEAaukv0>

The standard message for welcome the new member must be written as follows:

Dear **(name of the new member)**,

The PSCE Team from SBS Lisbon comes hereby to inform you that, in the quality of new member in the Purchasing Family, you have been provided with access to the purchasing tools mentioned below, as per agreement of the Purchasing Process Leader - Sylvie Severini:

**(list of purchasing tools + accesses data)**

Considering this, you are now able to access all the refereed tools, in order to execute your professional daily activity in a smoothly way. Besides, our team also prepared a “Welcome Package” specially designed for supporting the new members in their first login and contact with the tools, available through the following link:

<https://drive.google.com/open?id=1WWWl3FwSBzRyphu5ILwyKgBba4vsuJXN2cPtEAaukv0>

or [https://drive.google.com/open?id=14kCscvezBjnNsd39CXrl6fiBVR5lqgp7\\_IG9nVUBLIQ](https://drive.google.com/open?id=14kCscvezBjnNsd39CXrl6fiBVR5lqgp7_IG9nVUBLIQ) (if the only provided tool is CONVERGENCE)

Please do not hesitate to contact our team in case you need any further support,

*Best Regards,*

**PSCE SBS Lisbon Team**

1. For the accesses removal it is not necessary to inform the person who is about to leave, only being necessary to inform the Purchasing Process Leader that the request has been completed.
1. When completed the procedure COMPASS the group PtP D&A Purchasing Tools can close the initial ticket created by the Purchasing Process Leader, being always possible for the requester or / and new member to reopen the ticket, in case of necessity.