SRM7 How to create user

Scope

APAC EMEA
LAM NAM

ERP

PI1 PF1
WP1

References

Attachments

+

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INTRODUCTION

Objectives and scope of this procedure

This OP explains how to create a user when he doesn't exist in SRM7.

Requirements

- User to be created in SRM7 must have a user ID in GRC tool
- Check if the user already exists in SRM7 (transaction SU01). If he already exists, check his validity date. If it is in the past, just reactivate the user by changing the end of validity date to 31.12.9999
- The creation of the SRM7 account of a user needs to be done when user needs access as requester, as approver, to display or as administrator:

  1. If user is a **requester**:

     1.1. BIP Application Manager/ End User Partner (EUP) requesting the user creation must create a ticket with the Procurement Organization excel file in which he must set up the new user.
     He also has to provide the name of the manager / financial approver and position (in the financial approval structure) of the hierarchical manager of the user.
     Check the Application Manager/EUP on SRM AM & WW Controllers list.

     1.2 If user to be created is from **NAM region** (US, CA or MX), account creation request needs to be submitted by his manager or by End User Partner of the site, through the Form.

     1.3 For **EMEA region**, there is the possibility to use a Form to account creation request. This form should be submitted by user´s manager or by EUP of the site.
     However, if the form was sent by the user or another person (ex: user colleague), SRM7 team can accept the request but need to ask for approval to user's manager with EUP of the site in copy. If needed, for additional clarification, escalate to Dirk Vercammen (responsible to give training to EUP's in EMEA zone).

     If the Form was not sent SRM7 team will proceed according to 1.1, however, team can always inform about the Form for future requests.

  2. If user is only an **approver**:
     Requesting the creation of the assignment of the user to an approval position is enough to proceed with user creation (in this case user is assigned to "Users for Approval Only – TO USE" structure).
     According with the type of approver - Technical (TC), Purchasing (PU) or Financial (FI) - request must be sent by Application Manager (for TC), Purchasing Key User (for PU) or Application Manager or WW/Zone/Function Controller (for FI).

  3. If user needs access only to **display** shopping carts (usually Service Centers Provisioning and Accounts Payable teams):
     Request must be submitted by manager of the user.

  4. If user is a new member in the Data & Analysis / SRM7 team access needs to be provided as **administrator**.

- Once user is created, user data must not be changed in SRM7 (last name, first name and e-mail address) unless in order to be updated according to an Active Directory change (information available in GRC).
- Users created for Brazilian companies / plants (except for company ZBR1) also have to be created in the platform of Mercado Eletronico.

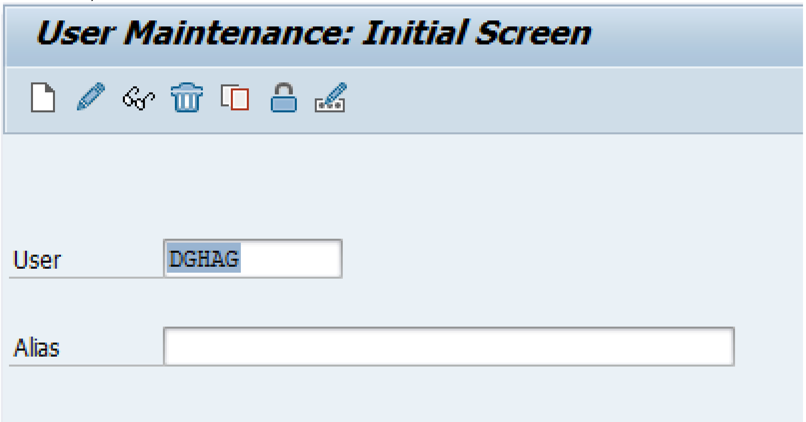
- Once the SRM7 accesses have been provided, a ticket requesting to grant accesses in Mercardo Eletronico should be created to PtP D&A LAM/NAM
- For this request, we must send the user ID and advise if it is a requester or approver

For users created on the departments related to Purchasing & Supply Chain we have to contact the buyer responsible for this project, Mr. Jefer Citadini, asking if the new user will be a purchasing approver, before contact the Mercado Eletronico to create the user in the platform.

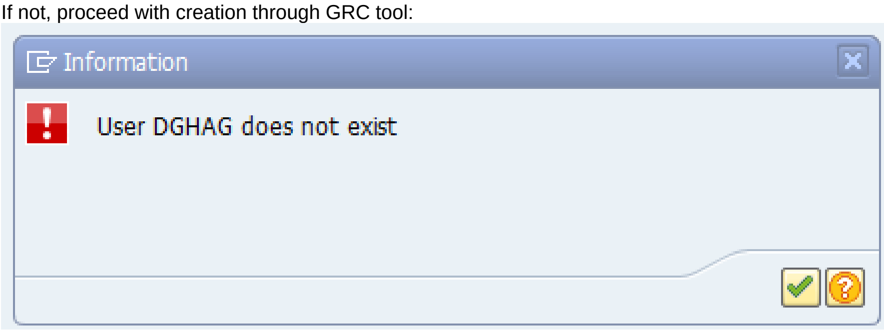
- WHO IS THE TEAM RESPONSIBLE TO PROVIDE ACCESS TO THE USER:
  - SBS PTP D&A SRM Team:
    - Access requests related to end users in BP2, BV2 and BQ2
      (Access to create and approve shopping carts as well as to visualize – general requests)
  - IS-SD-AUTHORIZATION Team:
    - Access requests related to IS users, auditors and technical users in BP2, BV2, BQ2, BD2
      (Access to specific roles and transactions)

Validation

Go to BP2, Tcode - SU01 – Check if the user exits:



If not, proceed with creation through GRC tool:



Freshdesk ticket handling

When a ticket arrives to the PTP D&A SRM Freshdesk Group, the ticket is pick up by a team member.
The ticket needs to be updated (if needed) to the correct classification "PTP Request ", PTP-Process "Data & Analysis, PTP-Subprocess "SRM7" and PTP-Category "Approval structures maintenance".

- Make analysis of the request to see the person responsible to validate the request.
- Check if the ticket requester is the Site Application manager /WW Controller/Purchaser Key User or was validated by Site Application manager/WW Controller/Purchaser Key User. To check the person responsible to validate see the link below:

{+}https://docs.google.com/spreadsheets/d/1_5H3sPBO7bN3HJvOcx_hRUsmujwLHhYKoTXEpmRxU3M/edit#gid=2051071738+

If not an approved requester, the team contact the Site Application manager (AM)/WW Controller/Purchaser Key User to validate the request. (1)
Change the status of the ticket to "Need for more information"
If yes, proceed with the changes

- Make the necessary changes
- After the modifications are done the team member Inform all involved parties in the loop of the changes made.

The ticket can now be closed.
Change the Ticket status to "Closed".

(1) When an email is sent asking for more details (requester) or some kind of approval (AM + WW Controller), always put all involved parties in the loop (Requester + AM/WW Controller);

- If no feedback was provided, after 3 days we send the 1st reminder asking for feedback;

- If no feedback was provided, after 3 days we send the 2nd reminder asking for feedback;

- Finally if no feedback was provided, after 3 days we send a 3rd message with the following text:

**Dear xxxx,*
As we didn't received any feedback for our question/s it's not possible to our Team proceed with your request.

Please be informed that we need your site Application Manager/ WW Controller/Purchaser Key User approval to proceed with your account creation as requested (for example).

Dear Application Manager, we will proceed with the closure of this ticket.

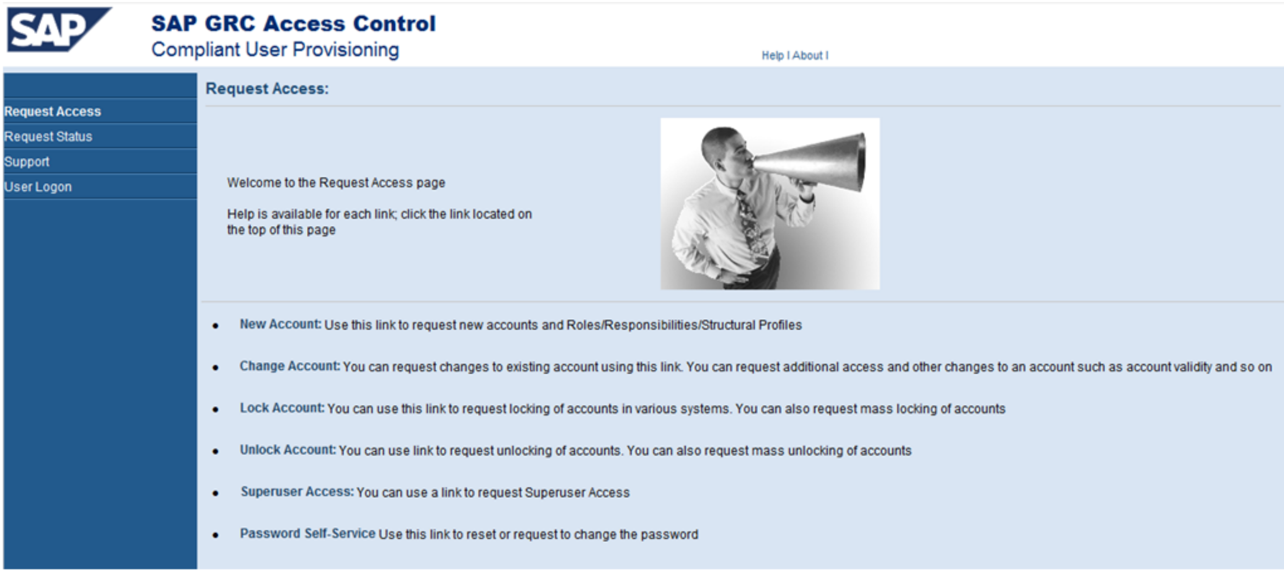
If you can provide us the requested feedback please just reply to this message and the ticket will automatically re-open in order to our Team proceed with requested actions.

Always at your disposal,
*SRM Team**

STEPS OF THE PROCESS

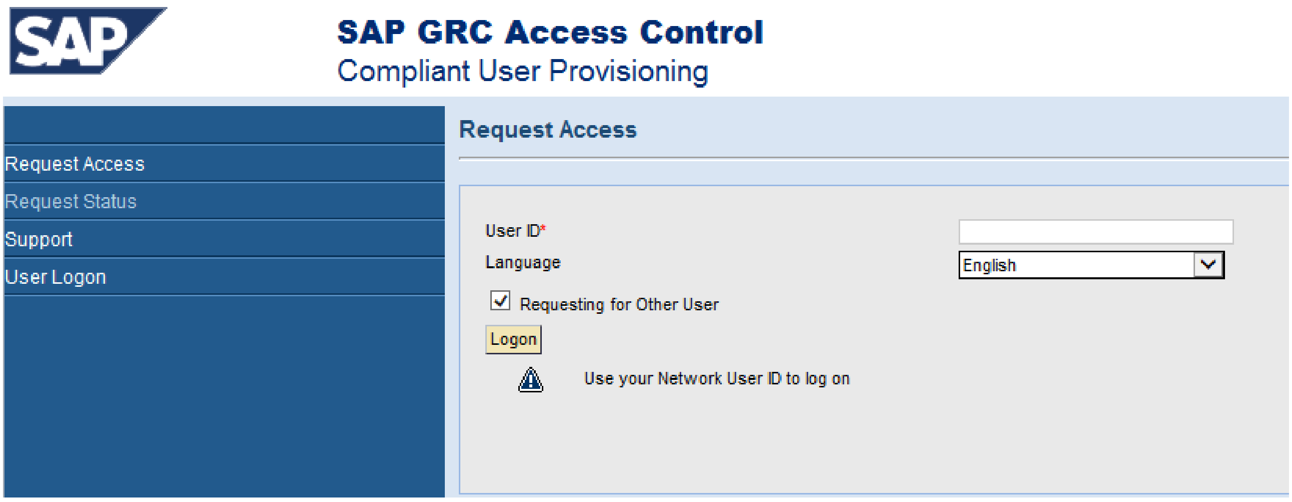
User Creation on GRC tool

Go to the URL link (with Internet Explorer): http://pyjsapr3.ibm.be.solvay.com/AE/index.jsp



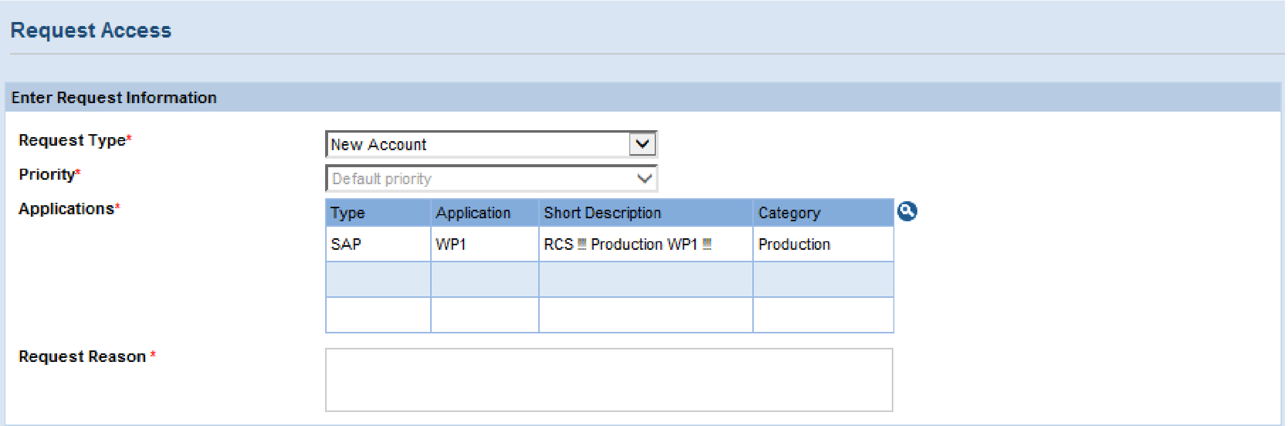
#1#2

#	Main activities	Tips / Best practices	Key points
1	Click on "Request Access"		
2	Click on "New Account"		



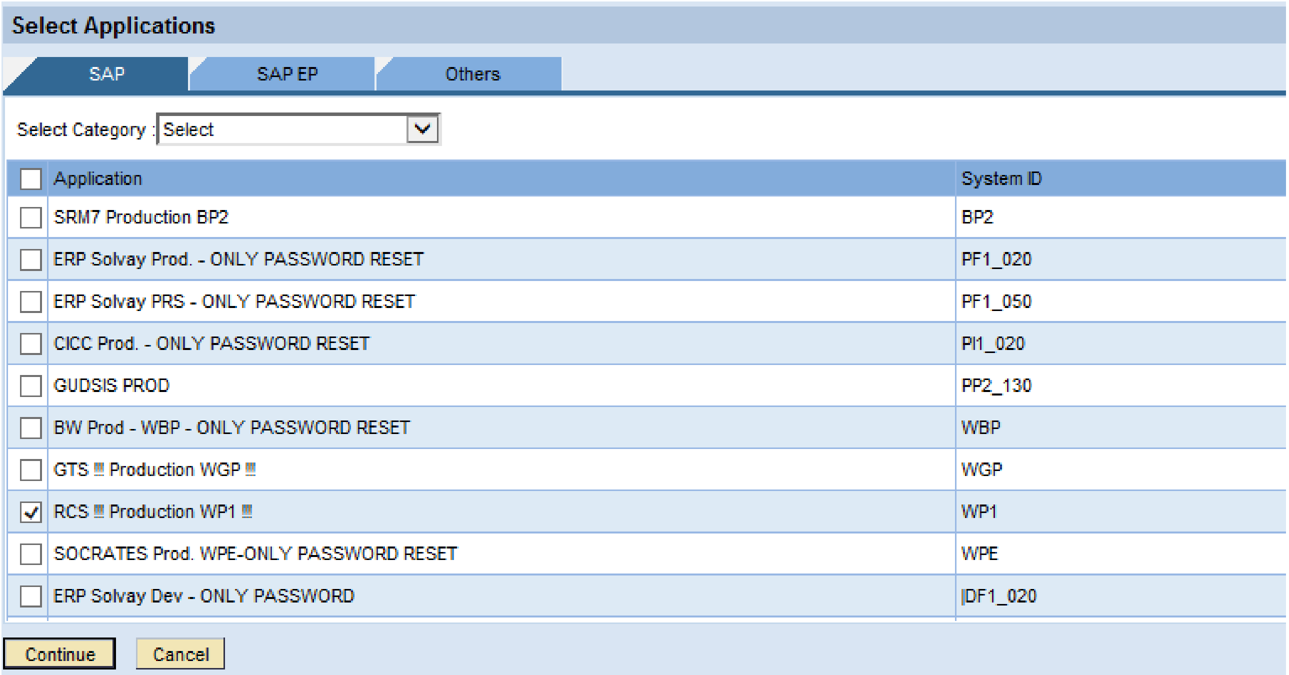
#1#2#3#4

#	Main activities	Tips / Best practices	Key points
1	Enter your own user ID		
2	Chose "English" as language		
3	Select option "Requesting for Other User"		
4	Click on "Logon" button		



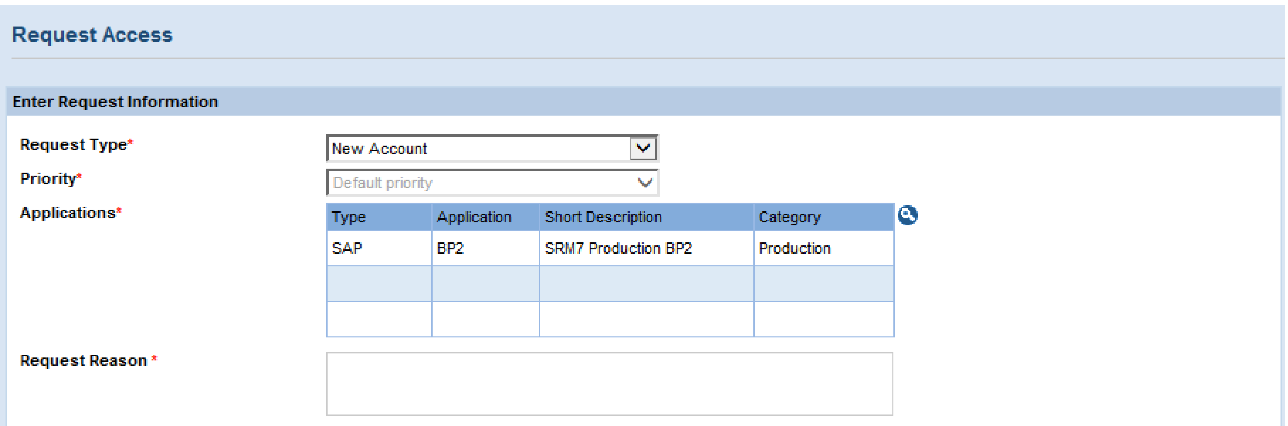
#1

#	Main activities	Tips / Best practices	Key points
1	Click on the loop to search the application correct - SRM7		The application for WP1 production appears by default. So, it's necessary to deselect this option and select the correct one for SRM7.



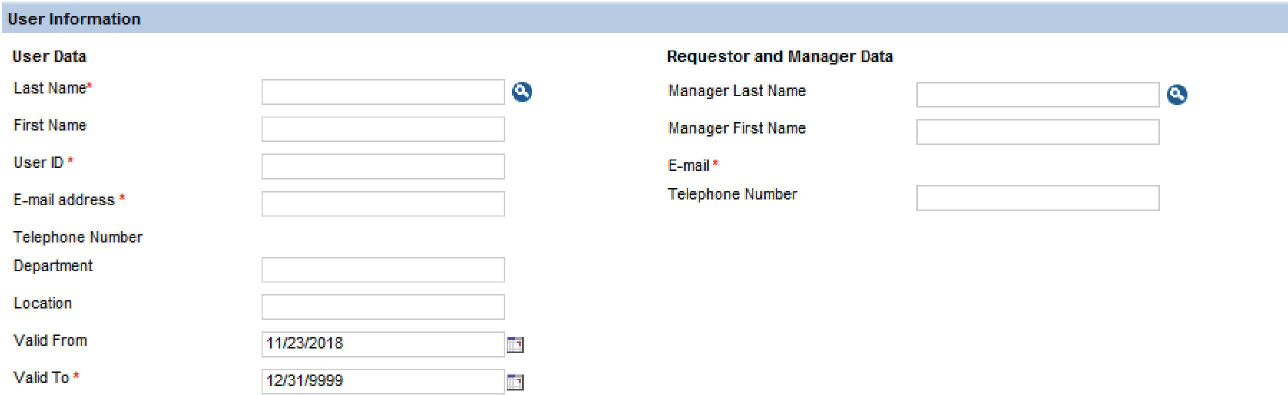
#1#2#3

#	Main activities	Tips / Best practices	Key points
1	Select "SRM7 Production BP2"		
2	Deselect "RCS Production WP1"		
3	Press "Continue" button		



#1

#	Main activities	Tips / Best practices	Key points
1	Enter the reason "SRM7 + Freshdesk ticket number"		

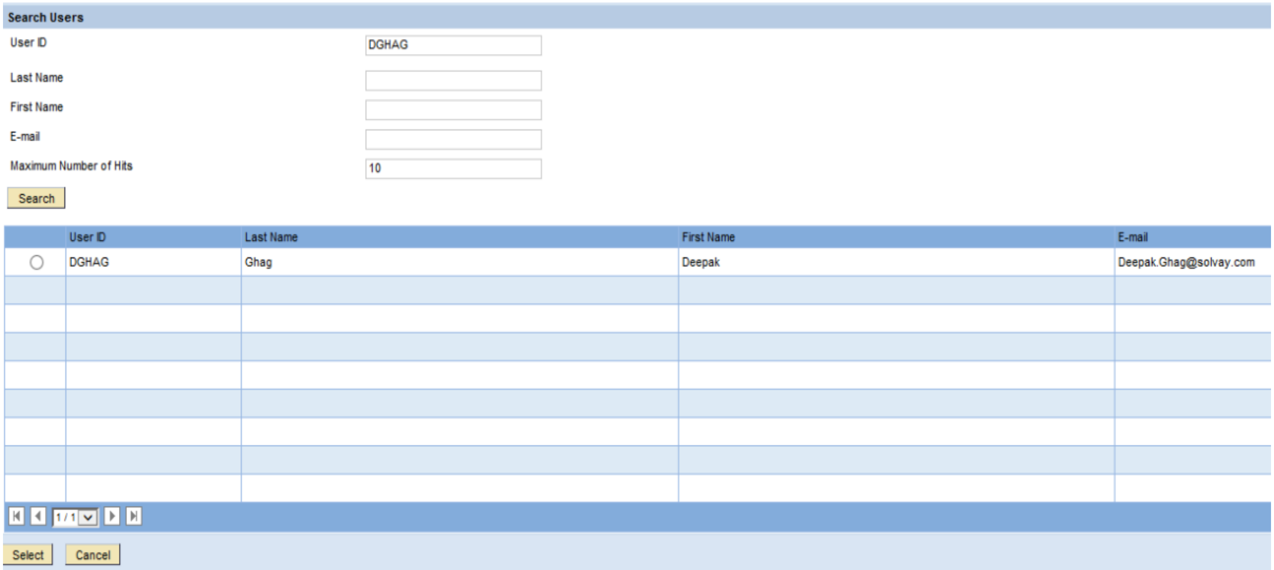

User Information

User Data
Last Name*
First Name
User ID *
E-mail address *
Telephone Number
Department
Location
Valid From 11/23/2018
Valid To * 12/31/9999

Requestor and Manager Data
Manager Last Name
Manager First Name
E-mail *
Telephone Number

#1

#	Main activities	Tips / Best practices	Key points
1	Click in the loop to search user		

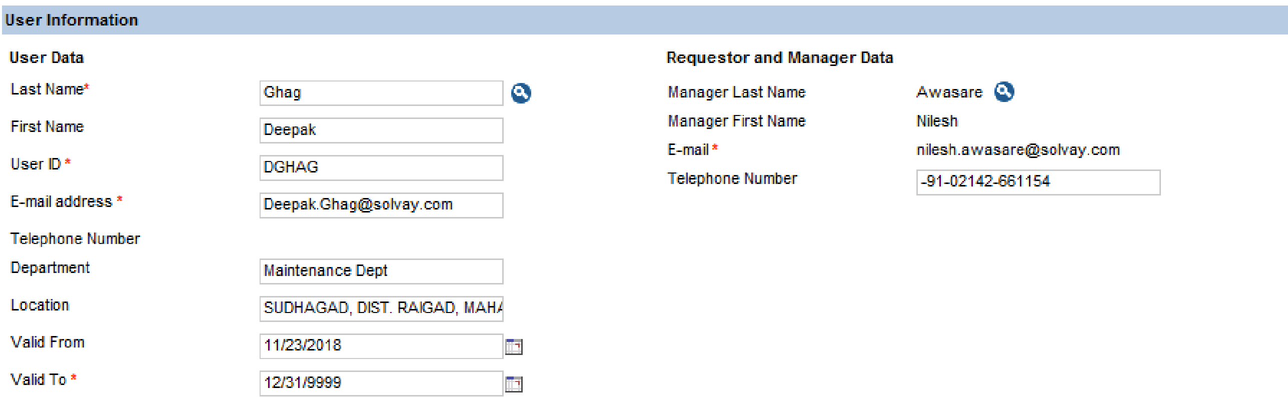

Search Users
User ID DGHAG
Last Name
First Name
E-mail
Maximum Number of Hits 10
Search

	User ID	Last Name	First Name	E-mail
○	DGHAG	Ghag	Deepak	Deepak.Ghag@solvay.com

1 / 1
Select Cancel

#1#2#3#4

#	Main activities	Tips / Best practices	Key points
1	Enter user ID in "User ID"	This search can also be done by the other fields "Last /First Name" or "E-mail"	Note that all information about the new user has to be exactly like the file sent by the Application Manager. If the information is not the same the AM should contact the Local Helpdesk to update the LDAP directory.
2	Click on "Search" button to find the user		
3	Click on the user to be created		As mentioned, just select the user if all information in this window is according to the Excel file sent.
4	Click on "Select" button		

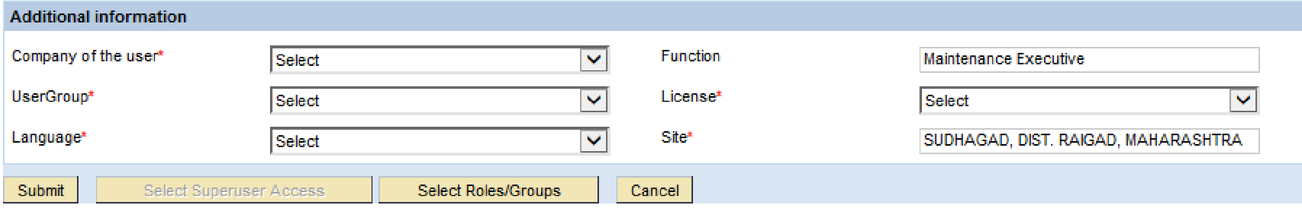

User Information

User Data
Last Name* Ghag
First Name Deepak
User ID * DGHAG
E-mail address * Deepak.Ghag@solvay.com
Telephone Number
Department Maintenance Dept
Location SUDHAGAD, DIST. RAIGAD, MAH/
Valid From 11/23/2018
Valid To * 12/31/9999

Requestor and Manager Data
Manager Last Name Awasare
Manager First Name Nilesh
E-mail * nilesh.awasare@solvay.com
Telephone Number -91-02142-661154

#1#2

#	Main activities	Tips / Best practices	Key points
1	Click on the loop button to modify user's manager	Check first if position is a Financial Approval. The requester's manager needs to be in the Financial structure.	In case user's manager in GRC is different of AM's file, it has to be modified (as the same done to user)



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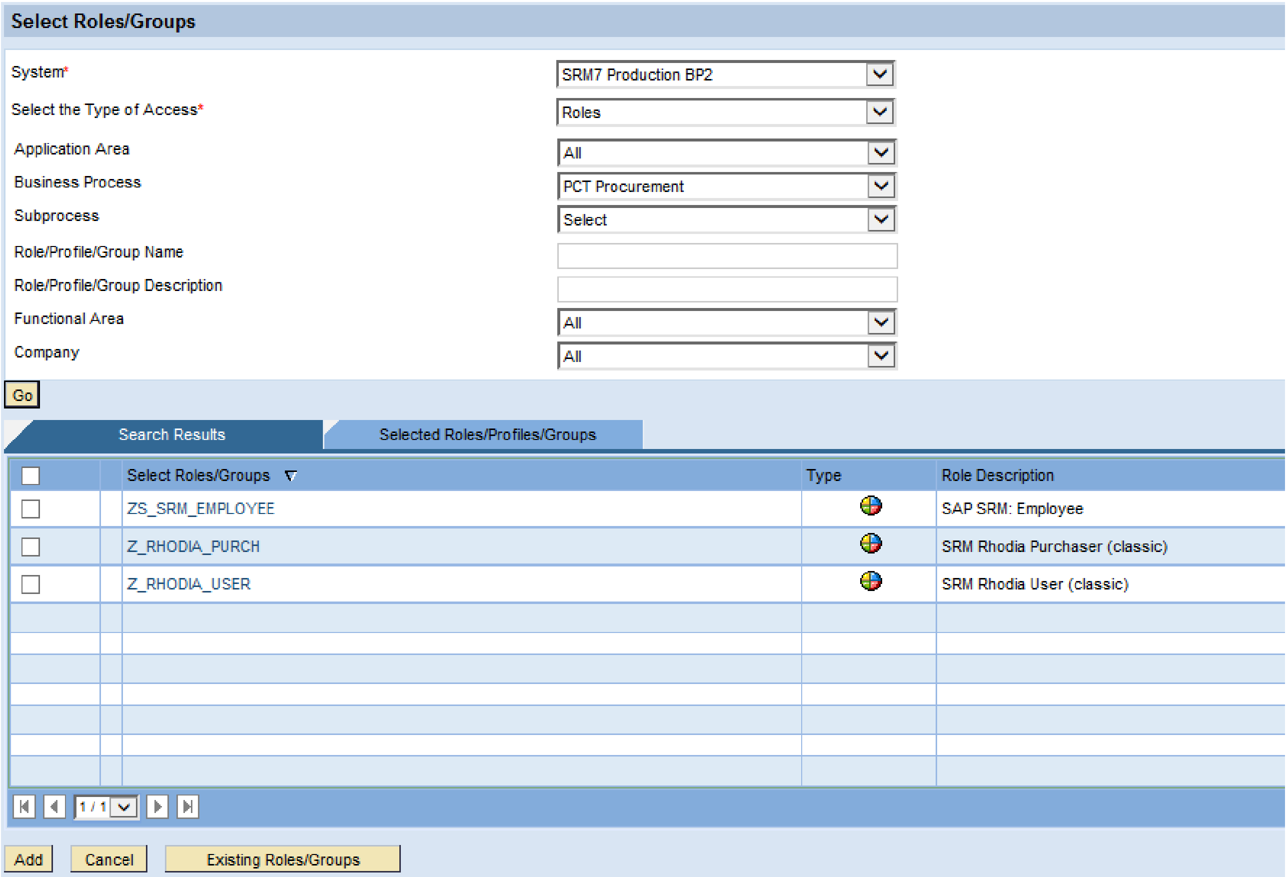
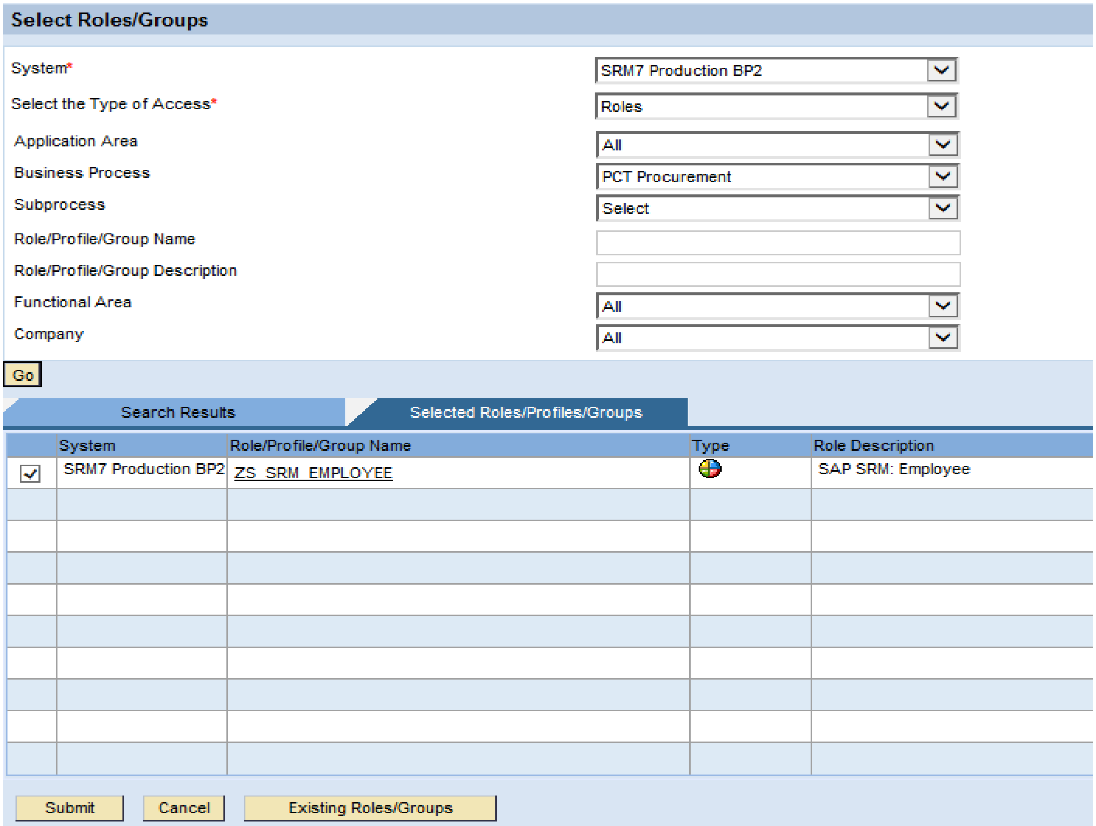
5#6

#	Main activities	Tips / Best practices	Key points
1	Choose the company of the user		
2	User group: select "SRM7"		
3	Language: choose the most appropriated		There are just 9 languages. In case of doubts, select "English".
4	License: select "BW End User"		
5	Site: if not defined, define it according with the information provided		Usually it's already defined
6	Press "Select Roles/Groups" button		



#1#2#3#4

#	Main activities	Tips / Best practices	Key points
1	Enter "PCT Procurement" as the Business Process		
2	Click on "Go" button		
3	Select "ZS_SRM_EMPLOYEE" role		If user is: • a Buyer (purchasing approver), select also "Z_RHODIA_PURCH" role • an Application Manager, Controller, Front Office or Back Office*, select also "Z_RHODIA_USER" role * ex: provisioning and accounts payable teams, as mentioned in the requirements
4	Click on "Add" button		



#1

#	Main activities	Tips / Best practices	Key points
1	Click on "Submit" button		

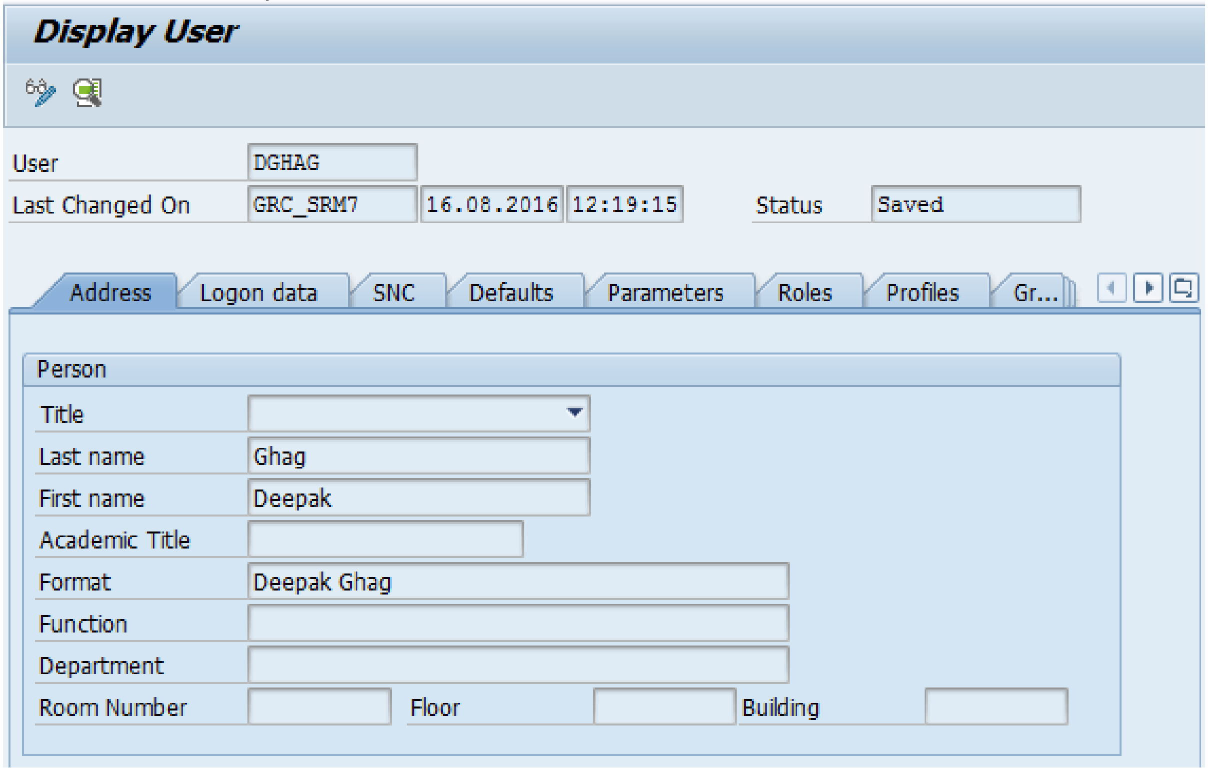
#1

#	Main activities	Tips / Best practices	Key points
1	A message confirms that the user was created.		An e-mail is automatically sent to the user with user ID and password.

Note: GENERIC users can be created in SRM if already created in GRC, but only as requester never with an approval position.

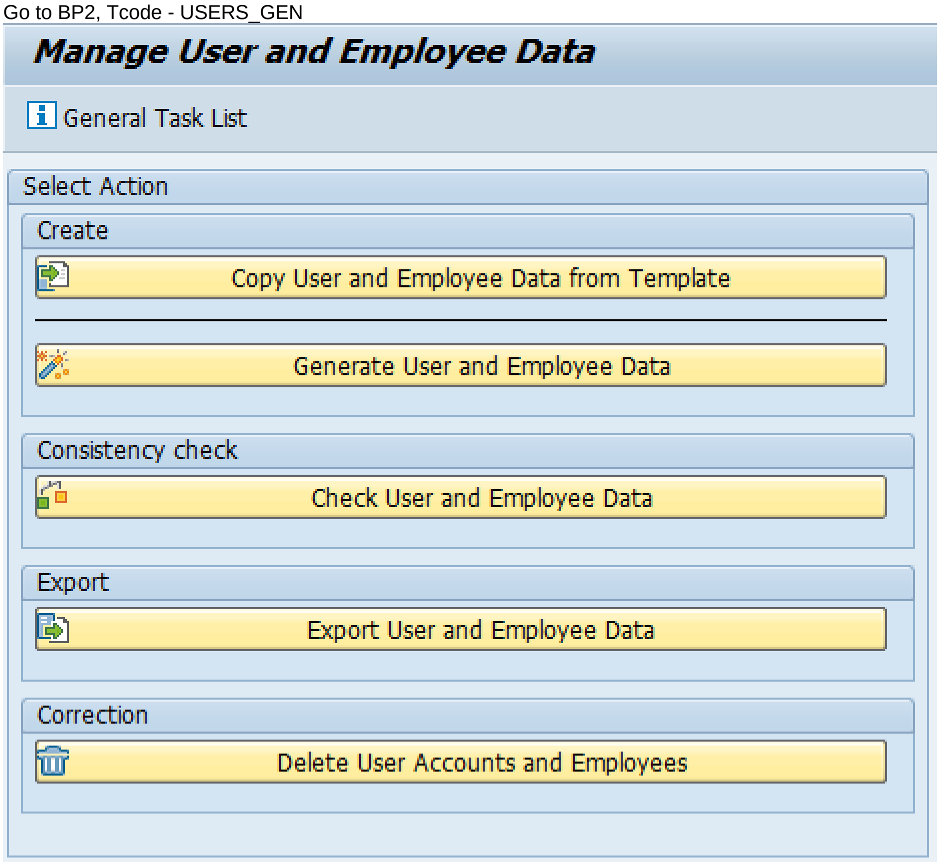
Confirmation of the user creation

Go to BP2, Tcode - SU01
Check if the user was correctly created.



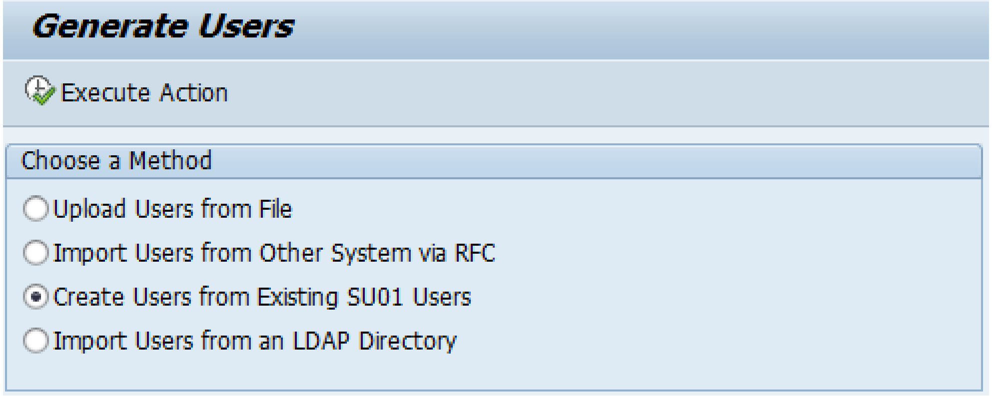
Assign the user to the Procurement Organization structure

Go to BP2, Tcode - USERS_GEN



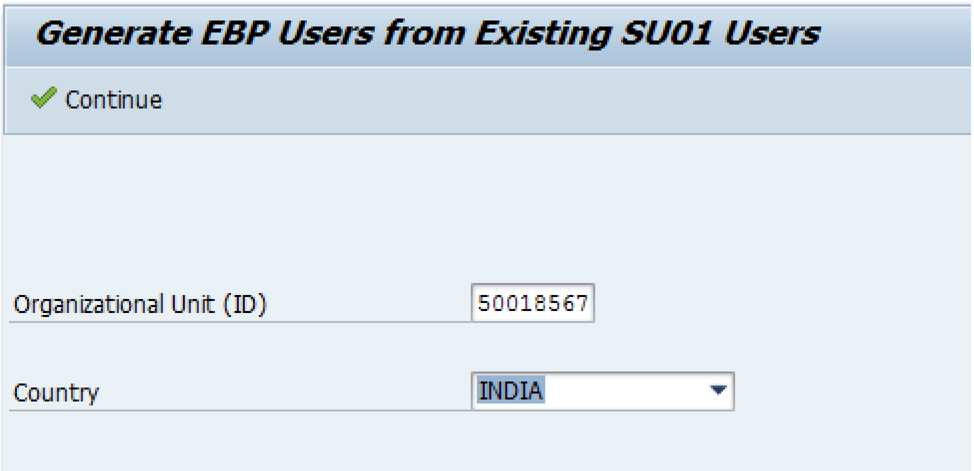
#1

#	Main activities	Tips / Best practices	Key points
1	Click on "Copy User and Employee Data from Template" button		



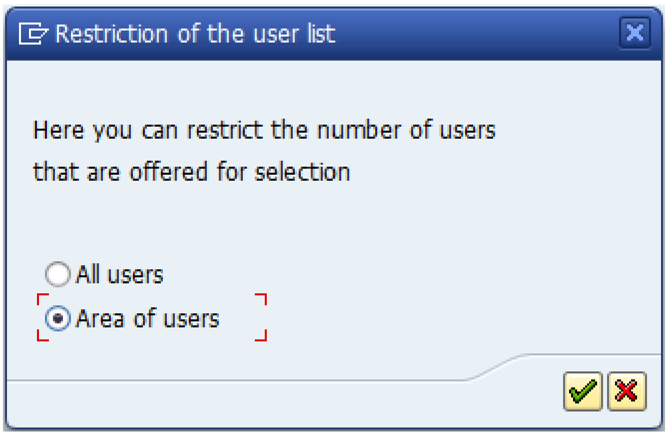
#1#2

#	Main activities	Tips / Best practices	Key points
1	Click on the option "Create Users from Existing SU01 Users"		
2	Click on "Execute Action" button		



#1#2#3

#	Main activities	Tips / Best practices	Key points
1	Enter the "Organizational Unit ID" which user has to be assigned		The user can be assigned to: • "Customer Support Desk", for Customer Support Desk • "Delivery and Service Centers", for Back-office or Front-office • "Plants", for Requesters (to create shopping carts) • "Users for Approval Only – TO USE", for who will only approve shopping carts
2	Enter the country related to the Organizational Unit		
3	Press "Continue" button		

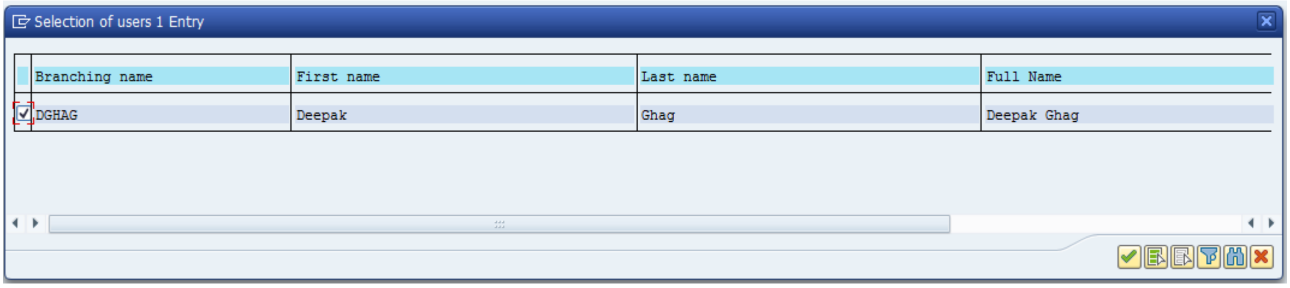


#1#2

#	Main activities	Tips / Best practices	Key points
1	Select "Area of users"		
2	Press "Continue"		

#1#2

#	Main activities	Tips / Best practices	Key points
1	Enter the user ID		
2	Press "Continue"		



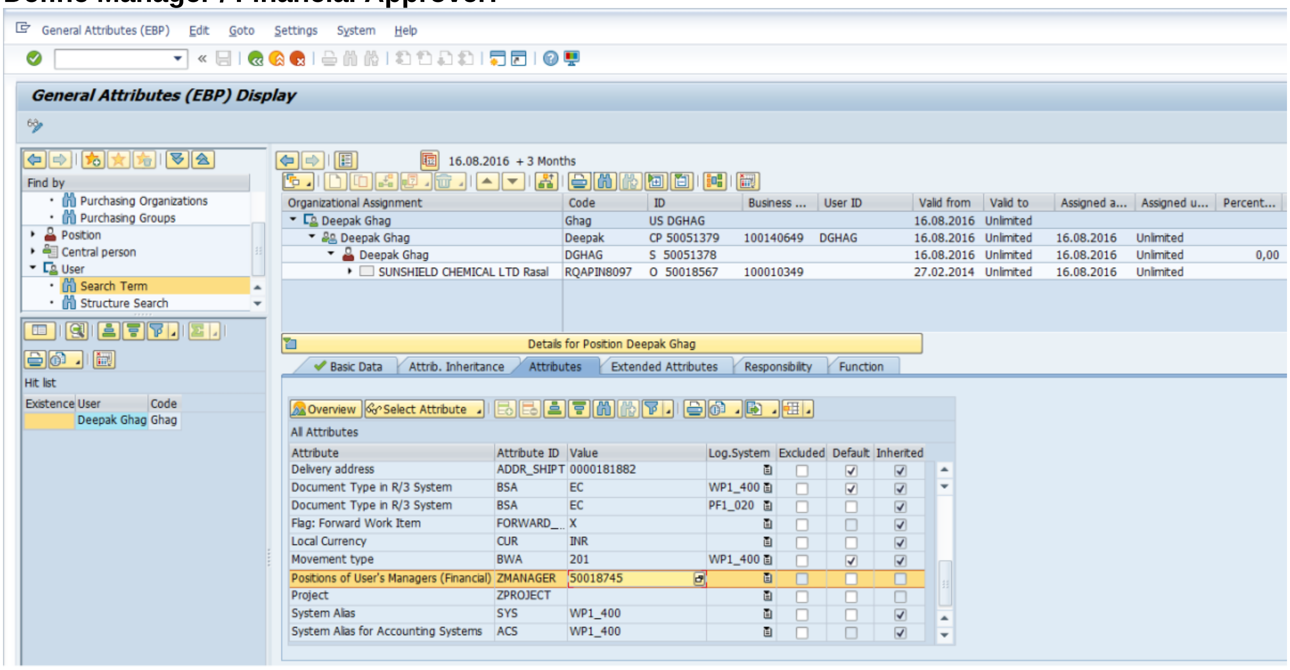
#1#2

#	Main activities	Tips / Best practices	Key points
1	Select the user line		
2	Press "Copy" button to validate		

Manage the requester attributes in the structure

Go to BP2, Tcode - PPOSA_BBP

Define Manager / Financial Approver:

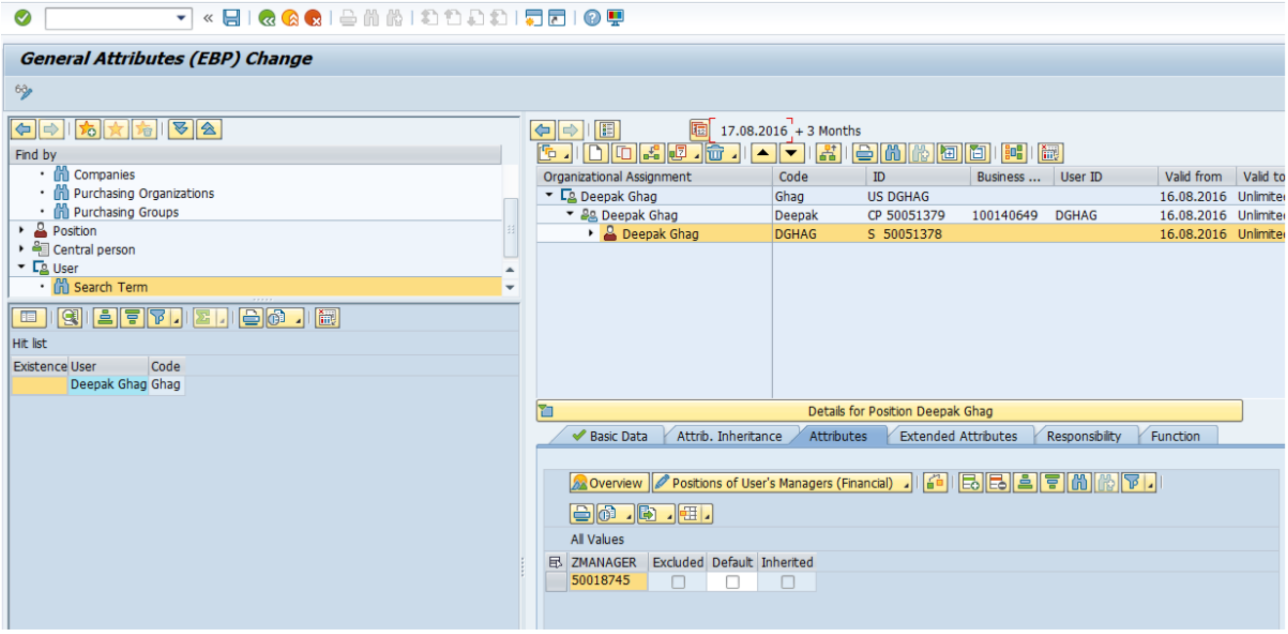


#1#2#3#

4#5#6

#	Main activities	Tips / Best practices	Key points
1	Search by user's ID		
2	Double click on user		
3	Double click on user's position		
4	Click on "Attributes" tab		
5	Click on the button to make changes		

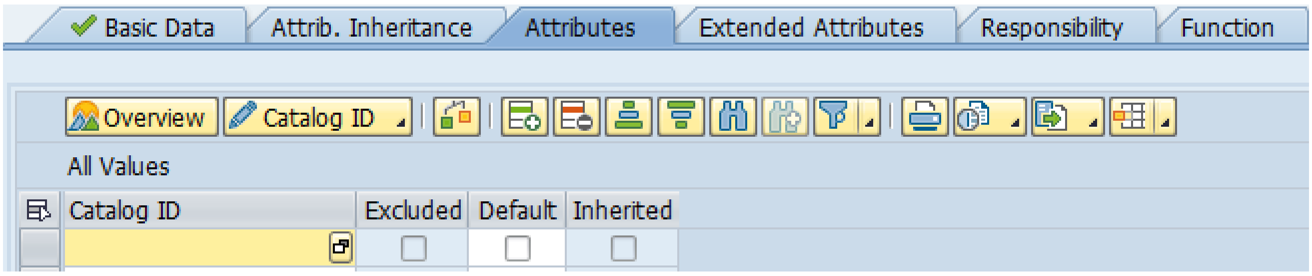
6	Double click on "ZMANAGER" option		



#1#2#3#4

#	Main activities	Tips / Best practices	Key points
1	Enter manager's / financial approver position code		
2	Click on button "Overview" to return to all attributes		
3	Save changes		
4	Click on button to return to mode Display		

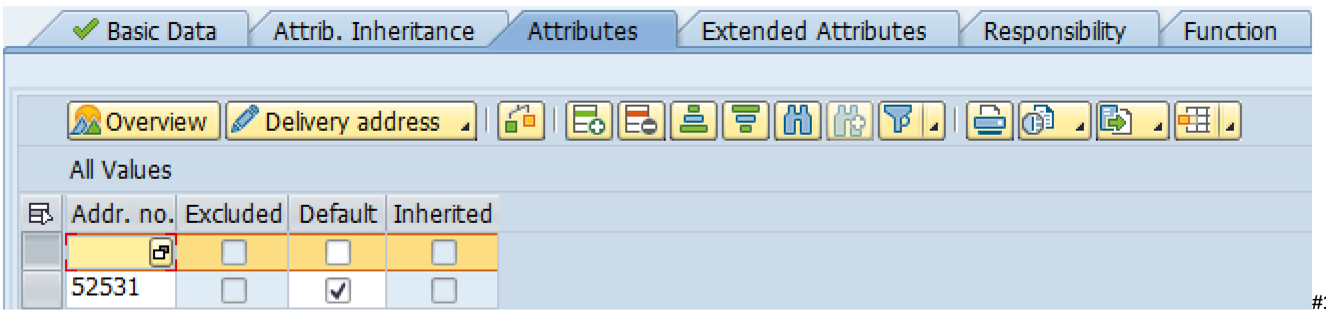
Provide access to catalogs to the user:



#1#2#3

#	Main activities	Tips / Best practices	Key points
1	Double click on "CAT" option on "Attributes" tab		
2	Click on "Add line"		
3	Insert the catalogs the user needs access to		Check if catalog is active and restrict / not restrict. (This information can be found on the list of e-catalogs)

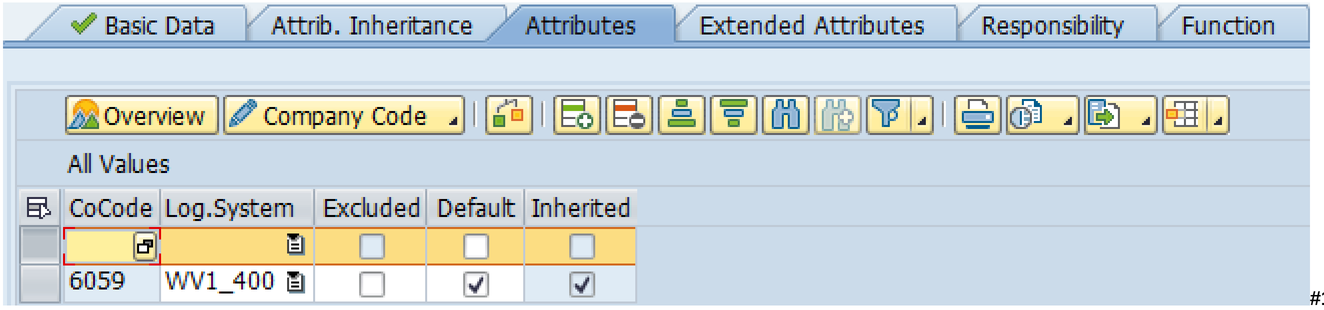
Provide access to an additional delivery address:



#1#2#3

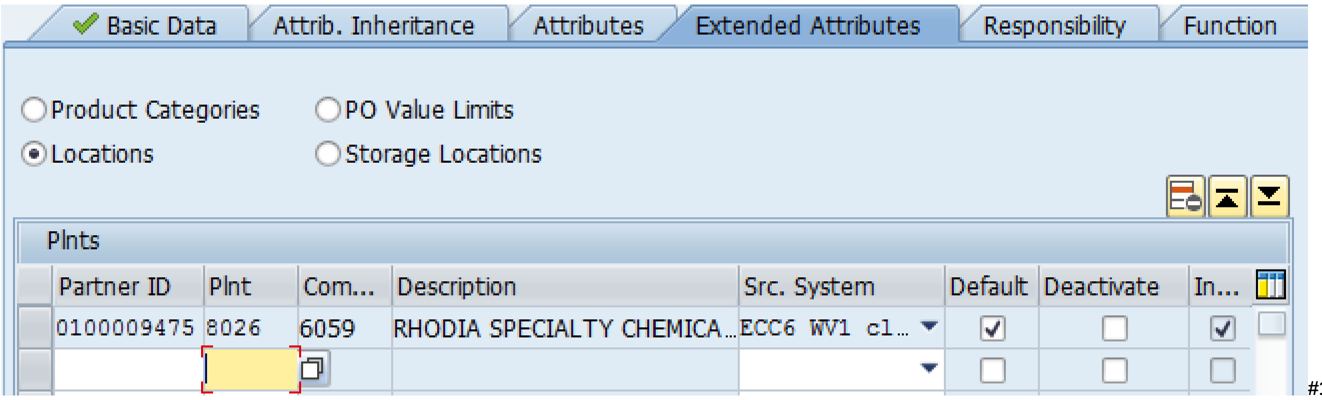
#	Main activities	Tips / Best practices	Key points
1	Double click on ADDR_SHIPT option on "Attributes" tab		
2	Click on "Add line"		
3	Insert the code of the address		

Provide access to other co-plants:



#1#2

#	Main activities	Tips / Best practices	Key points
1	Double click on BUK option on "Attributes" tab		Check first if this other company already exists in procurement organization
2	Choose the back-end system of the company		In case the back-end system is not the correct one system will not give an error Be careful not to insert the wrong system to avoid that the setup is not correct



#1#2#3#4

#	Main activities	Tips / Best practices	Key points
1	Click on "Extended Attributes" tab		
2	Select "Locations"		
3	Inset the plant code of the plant the user needs access to		Check first if this other plant already exists in procurement organization
4	Choose the back-end system of the company and press Enter		Line will be added (partner ID and company associated)

Note: Extended Attribute "Output limit" (defined on "PO Value Limits") is inherited at users' level from the country department (self approval limit).

Self approval limit amount can be checked on "Financial Validation Thresholds" table (level 0).

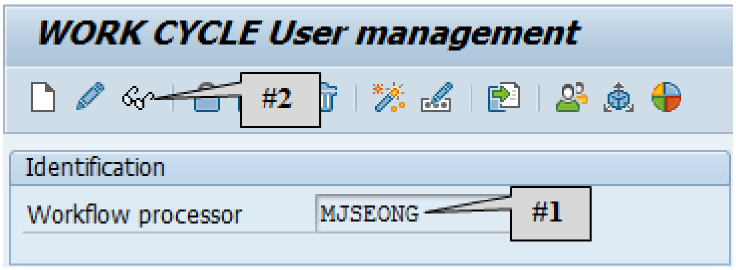
Create user in Work Cycle

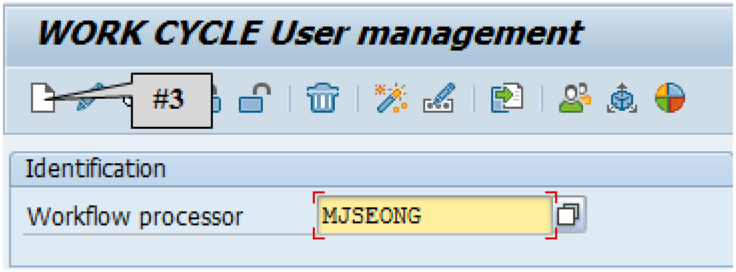
When a user receives access to SRM7, the user also needs to receive access to Work Cycle.

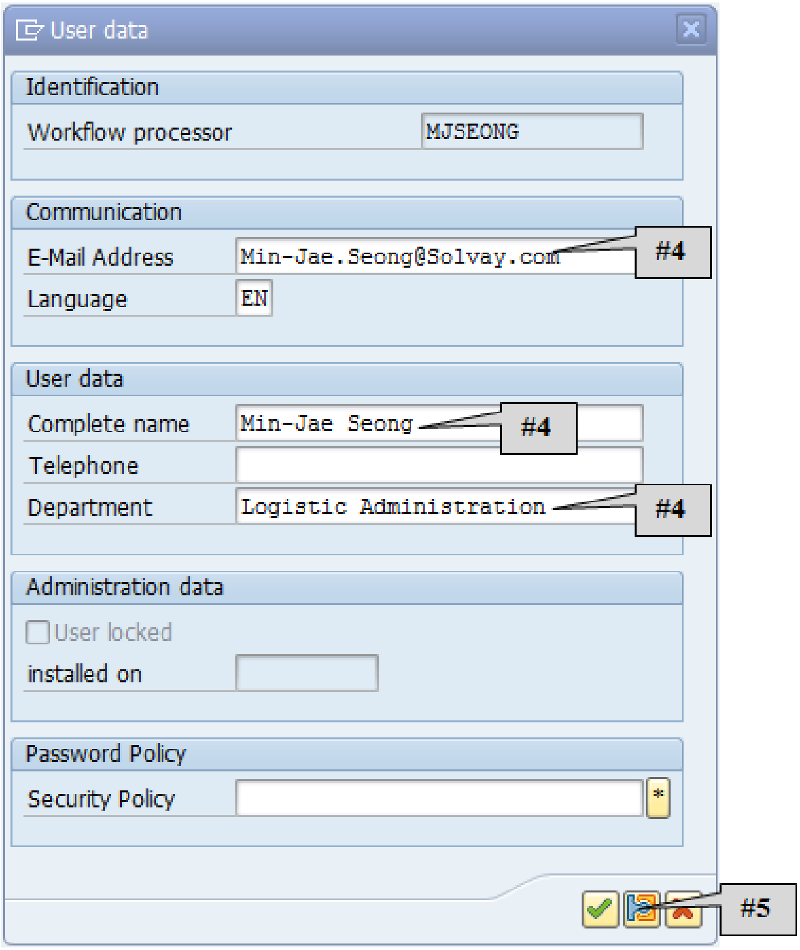
- If the user is a PF1 user, SRM7 Team will also create this access.

- If the user is a WP1 user, SRM7 Team doesn't need to do any action as the access will be automatically created.

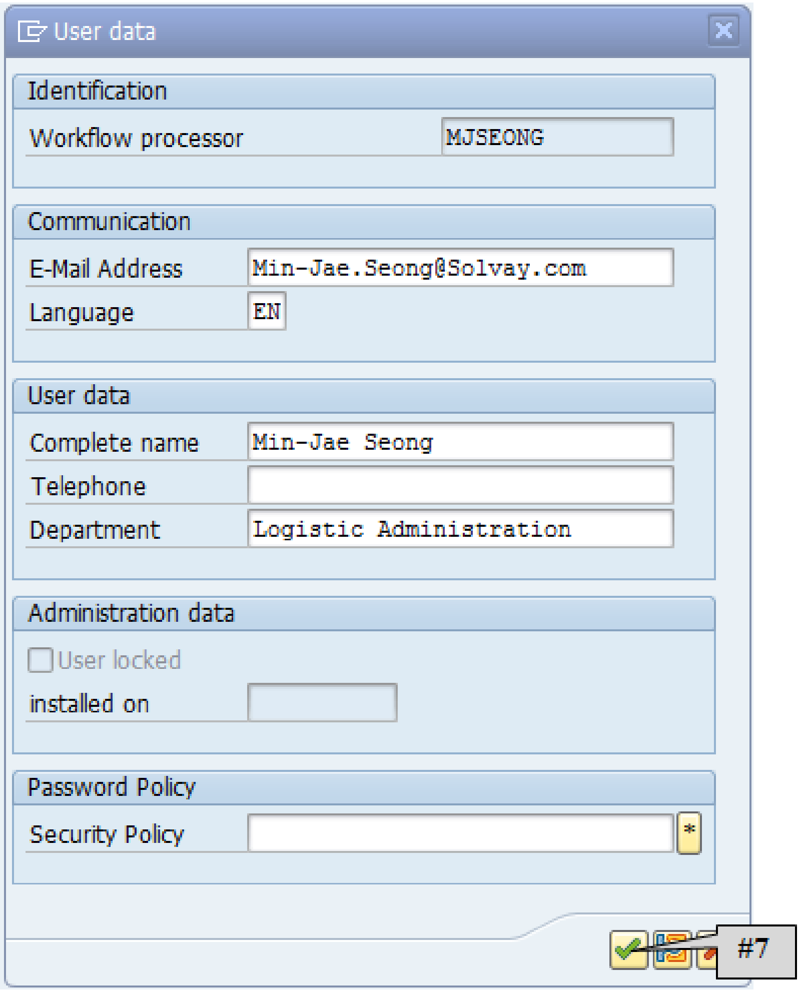
In order to create the access, go to PF1_020 and access t-code /COCKPIT/WUM

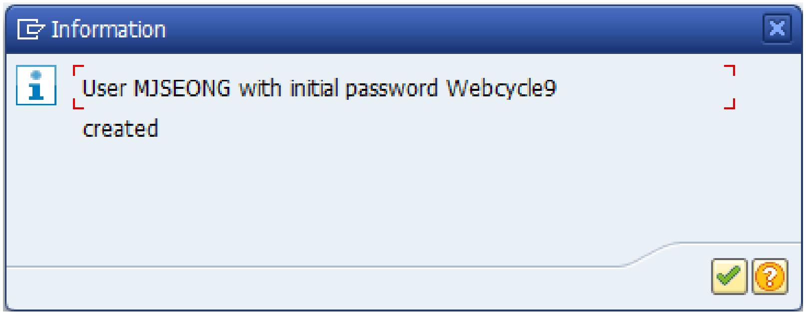


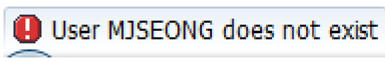

WORK CYCLE User management
#3
Identification
Workflow processor
MJSEONG


User data
Identification
Workflow processor
MJSEONG
Communication
E-Mail Address
Min-Jae.Seong@Solvay.com
#4
Language
EN
User data
Complete name
Min-Jae Seong
#4
Telephone
Department
Logistic Administration
#4
Administration data
User locked
installed on
Password Policy
Security Policy
#5


User data
SRM user name
MJSEONG
SAP user name
MJSEONG
First name
Min-Jae
Last name
Seong
Zone
AP
#6





#	Main activities	Tips / Best practices	Key points
1	Insert the ID of the user		
2	Click on “Display”		To check if the user is already created. If the user is still not created, the following message will appear: 
3	Go back and after inserting the ID of the user select “Create User”		
4	Fill the necessary details in “User data”		Check user data in GRC
5	Click on “Customer fields” and fill information		
6	Select “Continue”		
7	Then “Continue”		A message will appear confirming that the user was created

REFERENCES

ATTACHMENTS

End of document

Workflow history

This view shows the 5 most recent entries. The complete workflow log is available from the 'Document Activity' menu item.

Feb 26, 2020	Actor	Type	Activity	Version
Published	Patrícia Fonseca and Diane Kealy	Edit	multiple updates from Patrícia Fonseca and Diane Kealy	
	Diane Kealy	State	changed state to Published at 5:04 pm	v4
To be approved	Diane Kealy	State	gave *Approvers* approval at 5:04 pm	
	Rui Cabrita	State	assigned approval *Approvers* to Diane Kealy at 4:41 pm	
		State	changed state to To be approved at 4:41 pm	v3
For Review	Rui Cabrita	State	gave *Reviewers* approval at 4:41 pm	