

SRM7 How to Modify user

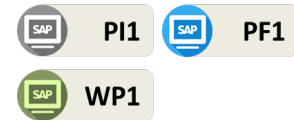
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Scope



ERP



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INTRODUCTION

Objectives and scope of this procedure

This OP explains the several ways to modify a user.

Requirements

- User must be created in SRM7 and set on the Procurement Organization structure.
- Check if the user already exists in SRM7 (transaction SU01) and Procurement Organization structure. If it already exists, check its validity date. If it is in the past, just reactivate the user by changing the end of validity date into 31.12.9999.
- BIP Application Manager requesting the user modification must create a ticket with the intended changes.
- Check the Application Manager on table: https://docs.google.com/spreadsheets/d/1_5H3sPBO7bN3HJvOcx_hRUsmujwLHhYKoTXEpmRxU3M/edit#gid=2051071738

Validation

Go to BP2 - Tcode SU01 and check if the user exists and is valid.

User Maintenance: Initial Screen

User:

Alias:

- If not, contact the application manager to request the creation of the user.

- If the user is created but the validity date is in the past, reactivate the user see "**2.1. Reactivate the user and assign to structure**"

Go to BP2 - Tcode PPOSA_BBP and check if user exists

General Attributes (EBP) Display

05.09.2016 + 3 Mont

Organizational Assignment

Code
Bell
Michael
US10005

Find User

With name: US10005

Assigned to: []

Object: []

Find Add X

Hit list

Existence	User	Code
	Michael Bell	Bell

#1#2#3

#	Main activities	Tips / Best practices	Key points
1	Click on the "Search term"		
2	Enter the user ID		
3	Double click on the user name		

Now we can proceed with any user modification.

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

Reactivate the user and assign to structure

Normally when a user is removed from the structure he is also deactivated on Tcode SU01, by changing the validity date.

However the user can be reactivated and set on the Procurement Organization structure again. To do this we need to reactivate the user and then assign him to the Procurement Organization structure.

Change the validity date

Go to BP2 - Tcode SU01

User Maintenance: Initial Screen

User:

Alias:

#1#2

Address Logon data SNC Defaults Parameters Roles Profiles Gr...

Alias:

User Type:

Password

New Password Rules (Uppercase/Lowercase Must Be Correct)

Initial password:

Repeat password:

Password Status:

User Group for Authorization Check

User group: RESERVED to SRM7 - Default User Group

Validity Period

Valid from:

Valid through:

#3#4

#	Main activities	Tips / Best practices	Key points
1	Enter the user ID		
2	Click on the icon "  "		
3	Select tab "Logon data"		
4	Enter a future date on "Valid through"		

Assign to the Procurement Organization structure

Go to BP2 - Tcode PPOSE





#7

Object abbr.	Object name	OrgUnit abbr	Start date	End Date
<input checked="" type="checkbox"/>	VMAHESHW V Maheshwari	RQAPIN8026	24.03.2014	31.12.9999

#8#9#10#11

Organization and Staffing Change #12

#	Main activities	Tips / Best practices	Key points
1	Click on "Search Term" to find the receiving department		
2	Enter the department ID in "With name"	This search can also be done with the name of the department	

3	Double click on the Name		
4	Click on the icon "  " Display/Change		
5	Right click on the department		
6	Click "Assign"		
7	Click "Incorporates"		
8	Enter the user ID in "With name"	This search can also be done with other information "Last/First Name"	
9	Click on the button "  "		
10	Select the correct user		
11	Click on the button "  "		
12	Click on the button "  " to save the changes		

Check the user after the move using the Tcode USERS_GEN.
Same action as "2.2.2. Check moving user".

Move requester from one plant to another

Before the moving it's necessary to check if there are pending Shopping carts and work items for this user, if yes please ask if they should be transferred to another user.

- To transfer Shopping carts or Work items please see operating procedure **BP2 – Transfer Shopping Cart and Work items between users.**


Before moving the requester from a department to another one, it's also necessary to check if the moving user and the department of destiny are correct.
Go to BP2 - Tcode USERS_GEN


Manage User and Employee Data

General Task List


Select Action

Create


 Copy User and Employee Data from Template

 Generate User and Employee Data


Consistency check

 Check User and Employee Data

Export

 Export User and Employee Data

Correction

 Delete User Accounts and Employees

#1

#	Main activities	Tips / Best practices	Key points
1	Click on "Check User and Employee data"		

Check receiving department

Object Synchronization and Repair

Object and Check Restriction

<input type="checkbox"/> Central Persons	0	
<input type="checkbox"/> Employee	0	
<input type="checkbox"/> Positions	0	
<input type="checkbox"/> Business Partner (Employee Role)		
<input type="checkbox"/> User		
<input checked="" type="checkbox"/> Organizational Unit(s)	50034097	
<input type="checkbox"/> Business Partner (Organizational Unit Role)		
<input type="checkbox"/> Branch from Organizational Unit	0	

Central Persons Only

Object Overview

Type	Number	Abbreviation	Start of Relationship	End of Relationship	Partner Number	Basic Data	Address	Object existence/consistency	Object links	Address consistency	Attribute supply
0	50034097	RQEUBEANZ	22.05.2015	31.12.9999	100027635	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

#1#2#3

#4

#	Main activities	Tips / Best practices	Key points
1	Click on the square "Organizational Unit(s)"		
2	Enter the Department ID		
3	Click on the icon " " to execute		
4	Check if all fields are green		

Check Moving user

Object Synchronization and Repair

Object and Check Restriction

<input type="checkbox"/> Central Persons	0	
<input type="checkbox"/> Employee	0	
<input type="checkbox"/> Positions	0	
<input type="checkbox"/> Business Partner (Employee Role)		
<input checked="" type="checkbox"/> User		
<input type="checkbox"/> Organizational Unit(s)	0	
<input type="checkbox"/> Business Partner (Organizational Unit Role)		
<input type="checkbox"/> Branch from Organizational Unit	0	

Central Persons Only

Object Overview

Type	Number	Abbreviation	Object existence/consistency	Object links	Address consistency	Attribute supply	Other
US	VMAHESHW	V Maheshwari	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

#3#1#2

#4

#	Main activities	Tips / Best practices	Key points
1	Click on the square "Organizational Unit(s)"		
2	Enter the User ID		
3	Click on the icon " " to execute		

4	Check if all fields are green		
---	-------------------------------	--	--

Move user

Go to BP2 - Tcode PPOSE





#7

Object abbr.	Object name	OrgUnit abbr	Start date	End Date
<input checked="" type="checkbox"/>	VMAHESHW V Maheshwari	RQAPIN8026	24.03.2014	31.12.9999

#8#9#10#11

Organization and Staffing Change #12

#	Main activities	Tips / Best practices	Key points
1	Click on "Search Term" to find the receiving department		
2	Enter the department ID in "With name"	This search can also be done with the name of the department	

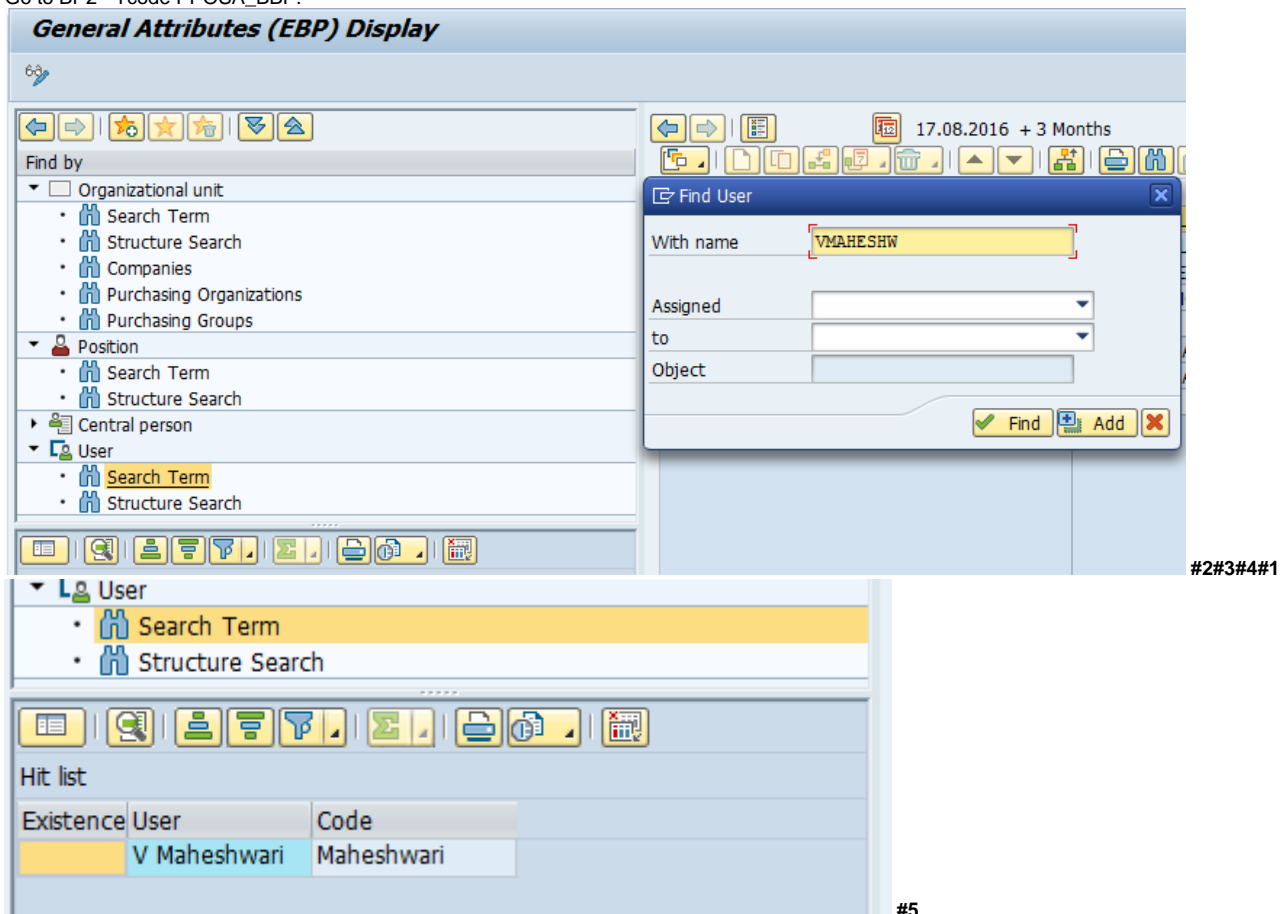
3	Double click on the Name		
4	Click on the icon "  " Display/Change		
5	Right click on the department		
6	Click "Assign"		
7	Click "Incorporates"		
8	Enter the user ID in "With name"	This search can also be done with other information "Last/First Name"	
9	Click on the button "  "		
10	Select the correct user		
11	Click on the button "  "		
12	Click on the button "  " to save the changes		

Check the user after the move using the Tcode USERS_GEN.
Same action as: "2.2.2. Check moving user".

Modify attributes

The attributes are the most common change on the user. There are two types of attributes, the normal attributes and the extended attributes and we can make changes in both.

Go to BP2 - Tcode PPOSA_BBP.



General Attributes (EBP) Display

17.08.2016 + 3 Months

Find User

With name: VMAHESHW

Assigned to: [Dropdown]

Object: [Dropdown]


Find Add

#2#3#4#1

Hit list

Existence	User	Code
	V Maheshwari	Maheshwari

#5

#	Main activities	Tips / Best practices	Key points
1	Click on the icon "  " Display/Change		
2	Click on "Search Term"		
3	Enter the user ID in "With name"	This search can also be done with other information "Last/First Name"	
4	Click "Find"		
5	Double click on the User name		

Change Attributes

There are several attributes that can be change on the user level. We can change the catalogs, company code and manager position. The catalogs are the most common attribute to change and we can add as many as we want. For the company code we can also add several to the user but only as additional ones, there should be one by default. The manager position we can only have one position.

#1#2#3

#5.1#4#5.2

#	Main activities	Tips / Best practices	Key points
1	Double click on the user Position		
2	Select the tab "Attributes"		<p>The attributes that can be changed on this level are:</p> <ul style="list-style-type: none"> • Catalogs (CAT) • Company code (BUK) Additional one • Manager Position (ZMANAGER)
3	Double click on the field you want to change		
4	To add a line		
4.1	Click to add a new line		
5	To remove a line		
5.1	Select the line to remove		
5.2	Click to remove the line		

Note: For the ZMANAGER attribute we can only have one position.

Change Extended Attributes

On this level we can only change the Locations and the PO value limits attributes.
To modify the locations (plant) on the extended attributes

Details for Position V Maheshwari

Basic Data | **Attrib. Inheritance** | Attributes | Extended Attributes | Responsibility | Function

Product Categories PO Value Limits
 Locations Storage Locations

Partner ID	Plnt	Com...	Description	Src. System	Default	Deactivate	In...
0100009475	8026	6059	RHODIA SPECIALTY CHEMICA...	ECC6 WP1 c1...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
				ECC6 WP1 client 400	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				PF1_020	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				SRM BP2 client 400	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

#1#2#3#4

#	Main activities	Tips / Best practices	Key points
1	Select the tab "Extended Attributes"		<p>The extended attributes that can be changed on this level are:</p> <ul style="list-style-type: none"> • Locations (plant) additional one (to add an additional plant, the company code of the plant must also be added to the user on the attribute BUK) • PO Value Limits (Output limit)
2	Click on the circle "Locations"		
3	Select the legacy of the plant (Rhodia or Solvay)		
4	Enter the code of the plant		

To modify the PO value limits (Output limit) on the extended attributes

Details for Position V Maheshwari

Basic Data | **Attrib. Inheritance** | Attributes | Extended Attributes | Responsibility | Function

Product Categories PO Value Limits
 Locations Storage Locations

Local Values

Approval Limit Currency

Output Limit Currency

User Budget Currency Validity

#1#2#3#4

#	Main activities	Tips / Best practices	Key points
1	Select the tab "Extended Attributes"		
2	Click on the circle "PO Value Limits"		
3	Select the currency		
4	Insert the value of the Output limit		

Change data for user

The User's data can be changed in order to match with Active Directory only (GRC).
Example: User Bobby Miner was created as a contractor and becomes a Solvay employee.

- If GRC is already updated, you can apply the changes accordingly
- If GRC is not updated yet, ask to the user to contact his local Helpdesk who will update GRC

To change the data for a user we have 3 steps:

1. Change user (SU01)
2. Change Central Person (BP)
3. Change Position (PPOSA_BP)

Organizational Assignment	Code	ID	Business ...
▼ Bobby Miner-contractor	Miner-contra	US BMINER	
▼ Bobby Miner-contractor	MINER-CONTRA	CP 50025300	100012386
▶ Bobby Miner-contractor	BMINER	S 50025299	

2
3

Step 1 - Change user

Go to BP2 - Tcode SU01

User Maintenance: Initial Screen

User:

Alias:

Maintain User

User: Last Changed On: Status:

Address | Logon data | SNC | Defaults | Parameters | Roles | Profiles | Gr...

Person

Title: Last name: First name:

Academic Title: Format:

Function: Department:

Room Number: Floor: Building:

Communication

Language: Telephone: Extension:

Mobile Phone: Fax: Extension:

E-Mail: Comm. Meth:

Assign other company address... Assign new company address...


Company

USERS EDIT GOTO INFORMATION ENVIRONMENT

Maintain User #5

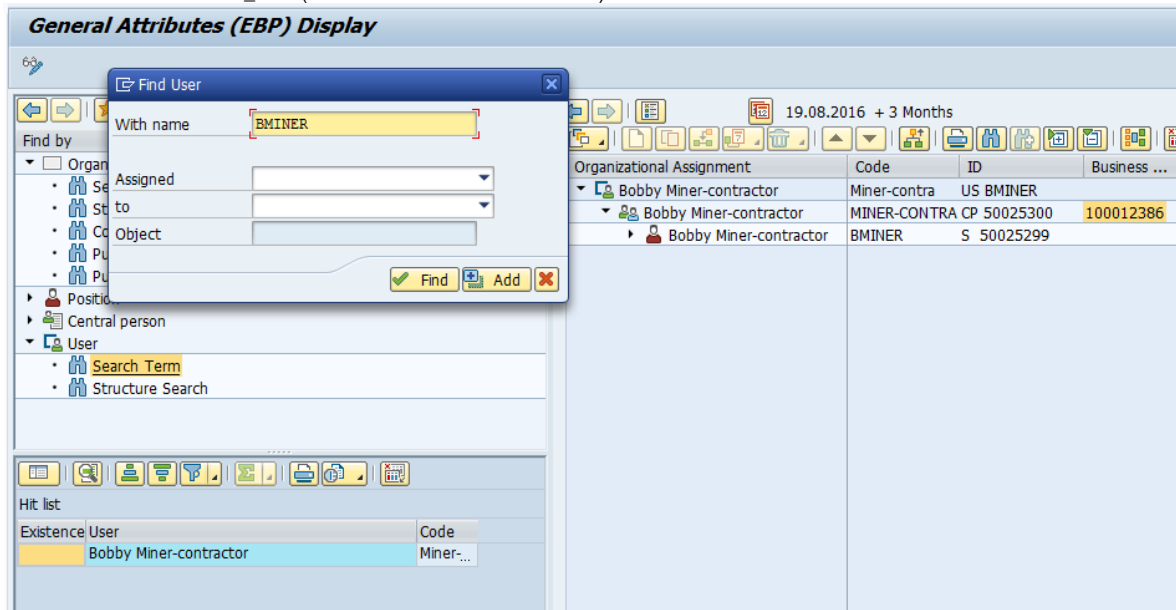
#1#2#3#4

#	Main activities	Tips / Best practices	Key points
1	Enter the User ID		
2	Click on the button " "		
3	Change the Name		

4	Change the Email		
5	Click on the button "  " to save the changes		

Step 2 - Change Central Person

Go to BP2 - Tcode PPOSA_BBP (to check the Business Partner ID)

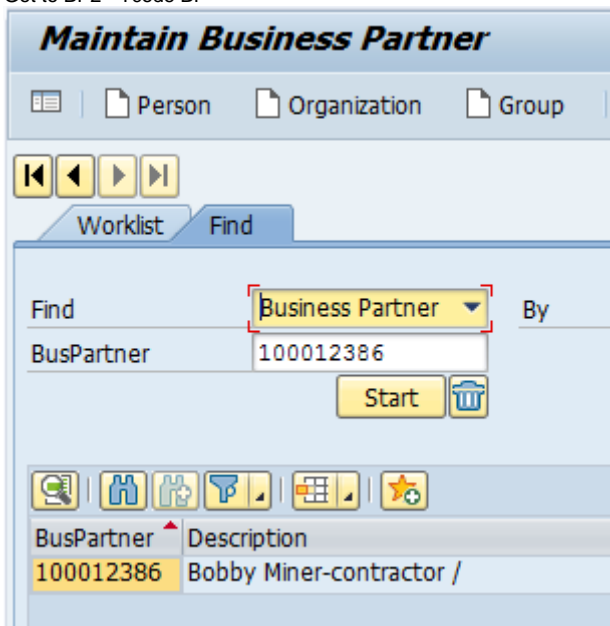


The screenshot shows the SAP 'General Attributes (EBP) Display' interface. A 'Find User' dialog box is open, with 'BMINER' entered in the 'With name' field. The background table displays organizational assignments for Bobby Miner-contractor, including the Business Partner ID 100012386.

#1#2#4#5#3

#	Main activities	Tips / Best practices	Key points
1	Click on "Search Term"		
2	Enter the user ID in "With name"	This search can also be done with other information "Last/First Name"	
3	Click "Find"		
4	Double click on the User name		
5	Take note of the Business Partner		

Got to BP2 - Tcode BP



The screenshot shows the SAP 'Maintain Business Partner' interface. The 'Find' tab is active, and 'Business Partner' is selected in the 'Find' dropdown. The 'BusPartner' field contains '100012386'. The result table shows 'Bobby Miner-contractor /'.

#1#2#3#4

Change Person: 100012386

Person Organization Group General Data Relationships

Business partner 100012386 ✓ Bobby Miner-contractor /

Change in BP role Business Partner (Gen.)

Validity Period 01.01.0001 - 31.12.9999

Address Address Overview Identification Control Payment Transactions Status

Name

Title Mr.

First name Bobby

Last name Miner-contractor

Search Terms

Search Term 1/2 MINER-CONTRACTOR BOBBY

#5#6#7

Person 100012386: Maintain Relationships

Person Organization Group Employee Relationship Change: General Data

Business partner 100012386 ✓ Bobby Miner-contract

Overview Is Employee of (1)

Relationship Cat. All

Relationship to BP From

Description Business partner A. Descrip

Is Employee of 100003751 RQ0241

Business partner 1 100012386 Bobby Miner-contractor /

Relationship Cat. Is Employee of

Business partner 2 100003751 RQ0241NOV / NONE

Valid from 22.09.2014

Valid To 31.12.9999

Validity Change

Valid from 22.09.2014

Valid To 31.12.9999

Address Data

Addr. Overview Print Preview

Person

Function

Department

Room Number Floor Building

Communication

Language

Telephone +1 410-354-8338 Extension

Mobile Phone

Fax Extension

E-Mail Bobby.Miner-contractor@solvay.com



Comm. Meth

Company

RQ0241NOV / / NONE

Partner

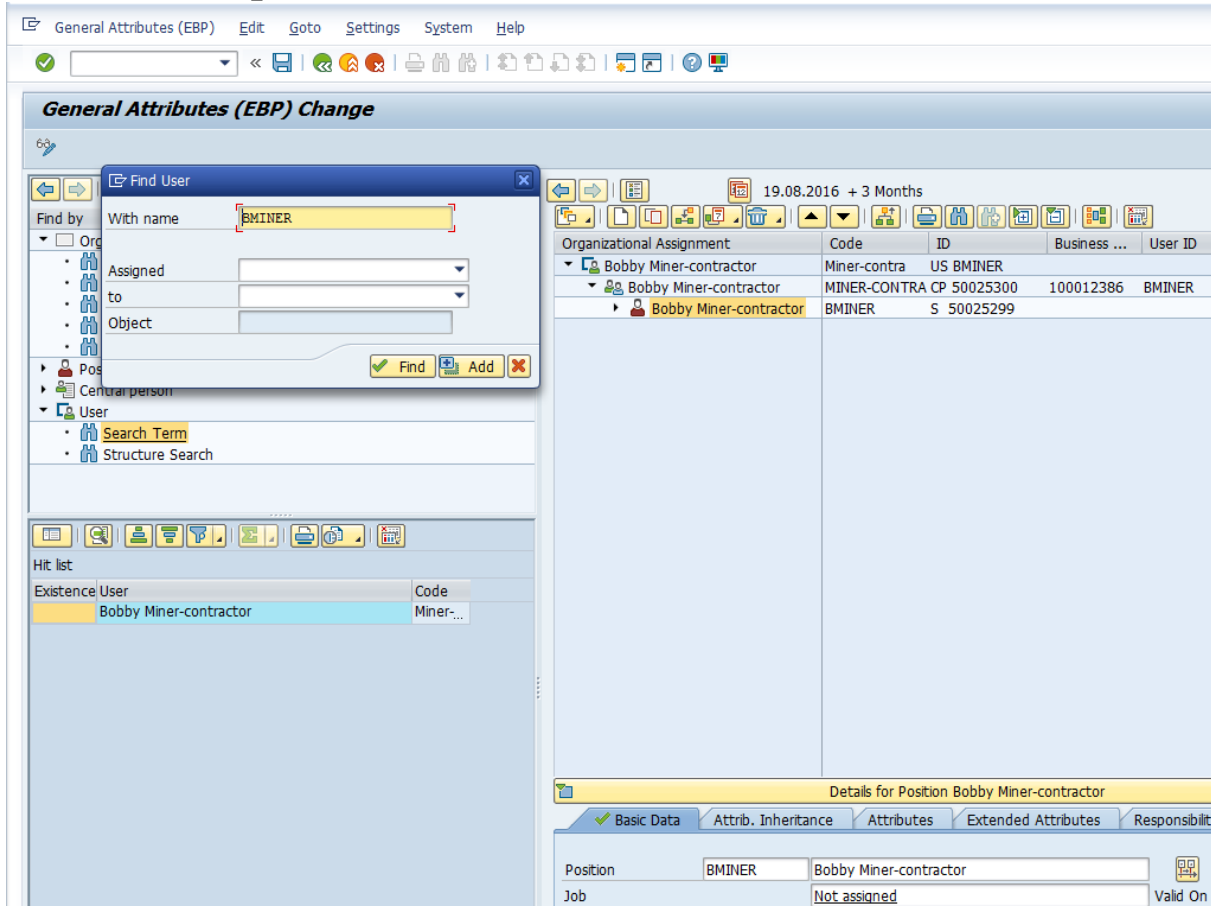
#9#10#11#8

#	Main activities	Tips / Best practices	Key points
1	Enter the Business Partner ID		
2	Click on button " Start "		
3	Double click on the BP found		
4	Click on the icon "  " Display/Change		
5	Update the "Last Name"		
6	Update "Search Term 1/2"		
7	Click on "Relationships"		
8	Double click on the line		
9	Click on the button "  "		
10	Update the "E-mail"		

11	Click on the button "  "		
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Step 3 - Change Position

Go to BP2 – Tcode PPOSA_BBP





The screenshot shows the SAP 'General Attributes (EBP) Change' window. A 'Find User' dialog box is open, with 'BMINER' entered in the 'With name' field. The 'Organizational Assignment' table displays the following data:

Organizational Assignment	Code	ID	Business ...	User ID
Bobby Miner-contractor	Miner-contra	US BMINER		
Bobby Miner-contractor	MINER-CONTRA CP	50025300	100012386	BMINER
Bobby Miner-contractor	BMINER	S 50025299		

The 'Hit list' shows the following results:

Existence	User	Code
	Bobby Miner-contractor	Miner...

At the bottom, the 'Details for Position Bobby Miner-contractor' section shows the position code 'BMINER' and the user 'Bobby Miner-contractor'. The job is listed as 'Not assigned'.

#	Main activities	Tips / Best practices	Key points
1	Click on the icon "  " Display/Change		
2	Click on "Search Term"		
3	Enter the user ID in "With name"	This search can also be done with other information "Last/First Name"	
4	Click "Find"		
5	Double click on the User name		
6	Double click on the Position		
7	Update the Position name		
8	Click on the button "  " to save the changes		

User Lock

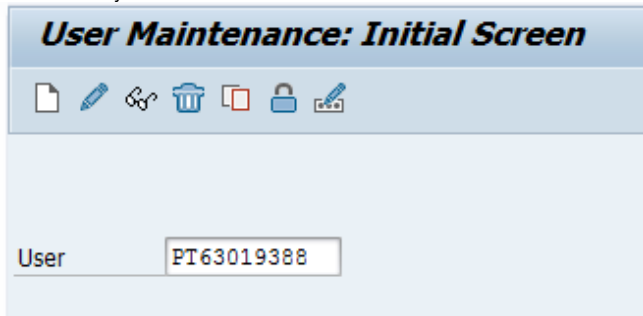
Although nowadays with the single sign-on functionality this may be a very rare case, it may happen that for some reason a user cannot access SRM7 and is prompted with a pop-up window where he should enter his password, but this fails and the user is locked for excess of attempts. In this case, the user must be unlocked and his password reset.

Check if the validity date of the user is valid. If not, contact the Application Manager of the user to validate if any actions are to be taken. If yes, proceed with unlocking the user.

Go to BP2 - Tcode SU01

Check validity of user

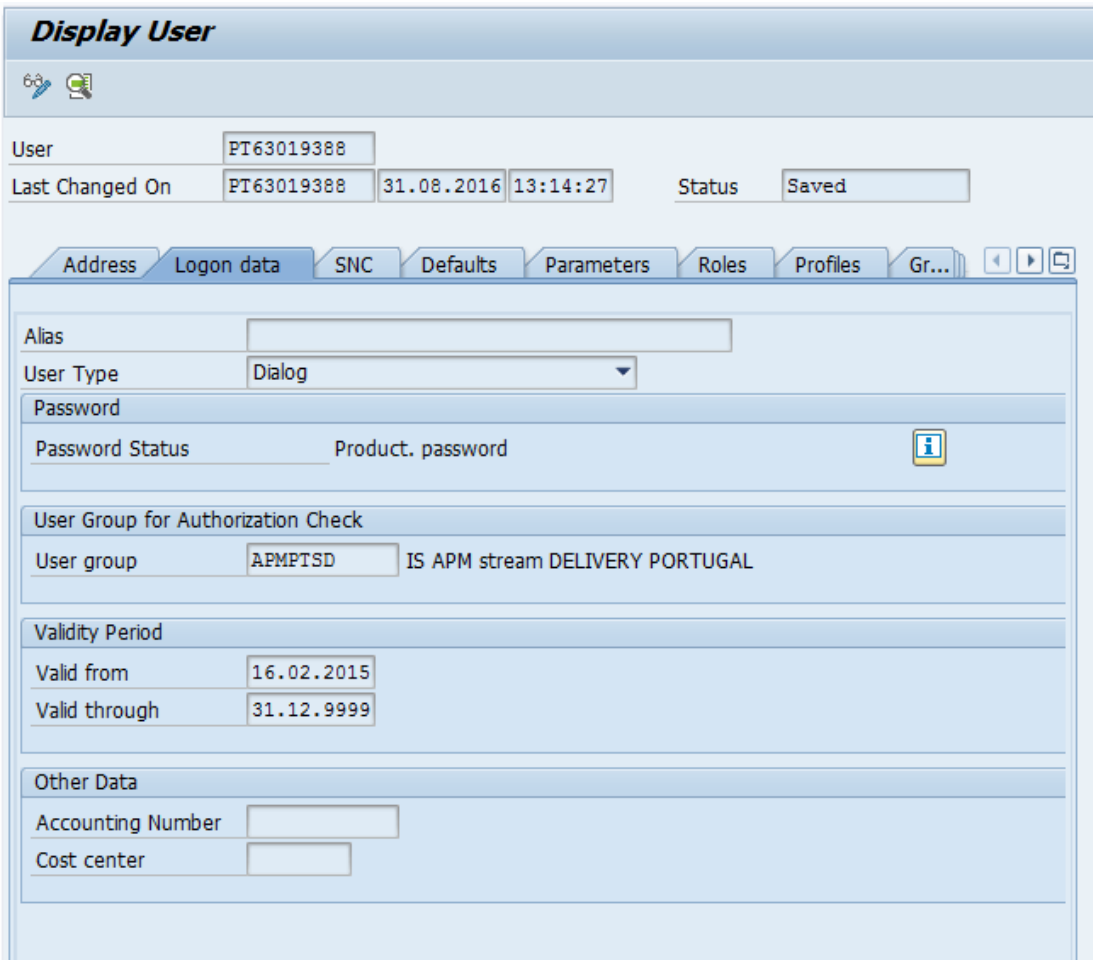
User Maintenance: Initial Screen



The screenshot shows the 'User Maintenance: Initial Screen' in SAP. It features a toolbar with icons for file operations, editing, and locking. Below the toolbar, there is a text input field labeled 'User' containing the value 'PT63019388'.


#1#2

Display User










The screenshot shows the 'Display User' screen in SAP. It displays user details for 'PT63019388'. The 'Last Changed On' field shows '31.08.2016 13:14:27' and the 'Status' is 'Saved'. The screen has several tabs: 'Address', 'Logon data', 'SNC', 'Defaults', 'Parameters', 'Roles', 'Profiles', and 'Gr...'. The 'Logon data' tab is active, showing fields for 'Alias', 'User Type' (set to 'Dialog'), 'Password', 'Password Status', 'Product. password', 'User Group for Authorization Check' (set to 'APMPTSD'), 'Validity Period' (Valid from '16.02.2015' to '31.12.9999'), and 'Other Data' (Accounting Number and Cost center).

#3#4

#	Main activities	Tips / Best practices	Key points
1	Enter the user ID		
2	Click on the icon "  " Display		
3	Select tab "Logon data"		
4	Check if the "Valid through" has a valid date	The date should be in the future	

Unlock

User Maintenance: Initial Screen











User

#1#2

Unlock User PT63019388




Locked by system manager !



#3

Unlock User PT63019388

Locked due to incorrect logons !

#3

#	Main activities	Tips / Best practices	Key points
1	Enter the user ID		
2	Click on the icon "  " Lock/Unlock		
3	Click on the icon "  " to Unlock		

Once the user is unlock change the password and send the new password to the user private email.

Change password

Go to BP2 - Tcode SU01.

User Maintenance: Initial Screen

User: BMINER

Alias:

#1#2

Maintain User

User: BMINER

Last Changed On: PT63019388 19.08.2016 14:35:49

Status: Saved

Address | Logon data | SNC | Defaults | Parameters | Roles | Profiles | Gr...

Alias:

User Type: Dialog

Password

New Password Rules (Uppercase/Lowercase Must Be Correct)



Initial password: *****

Repeat password: *****

Password Status: Product. password

User Group for Authorization Check

#3#4#5#6

#	Main activities	Tips / Best practices	Key points
1	Enter the User ID		
2	Click on the button "  "		
3	Select the Tab "Logon data"		
4	Enter a new password		
5	Repeat the password		
6	Click on the button "  " to save the changes		

After the change send the new password to the user private email by your email.

Note: Don't send the password from the ticket.

REFERENCES

ATTACHMENTS

No document attached.

End of document