

SRM7 Monitoring of SC pending approvals

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00	03.08.2018	New document

Table of Contents

1. INTRODUCTION
 - 1.1. Objectives and scope of this procedure
 - 1.2. Requirements
2. STEPS OF THE PROCESS
 - 2.1. To extract the report
 - 2.2. To setup "SC Automation" folder on Drive H
 - 2.3. To run the Macro "MasterFile-SC"
 - 2.4. Preparing the information to be sent
 - 2.4.1 Draft email
 - 2.4.2 Copying information to GDrive
 - 2.5. To send the emails massively via YAMM
 - 2.6. Freshdesk ticket handling
 - 2.7. Second Reminder – Provisioning side
3. REFERENCES
4. ATTACHMENTS

INTRODUCTION

Objectives and scope of this procedure

This OP explains how to send emails of shopping carts pending approval massively and how to proceed with second reminder done by Provisioning teams.

Requirements

- Have access to Shopping Carts Approval Monitor. For this, 3 roles in SU01 must be added to the user:

ZR_SRM_BP_S01
ZR_SRM_BP_S03
ZW_RCS_BC_S01

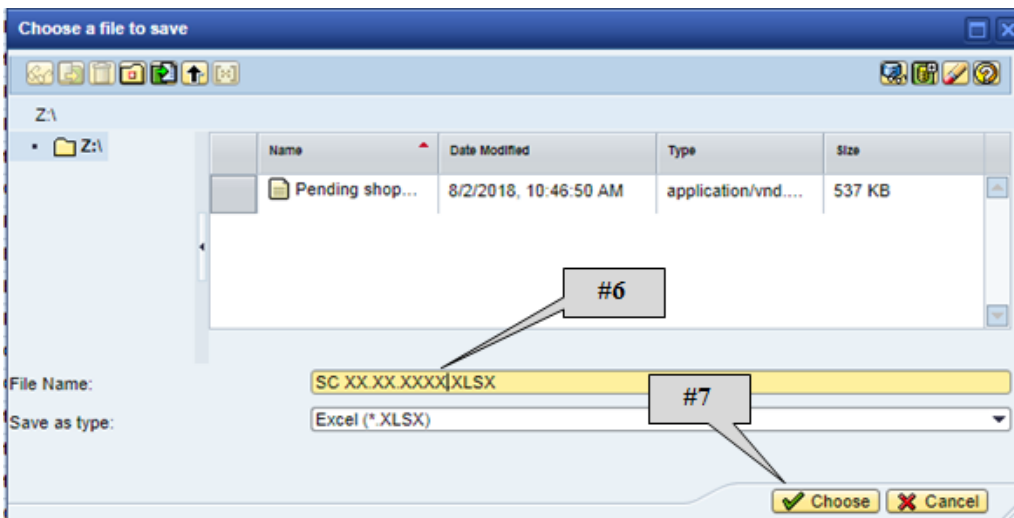
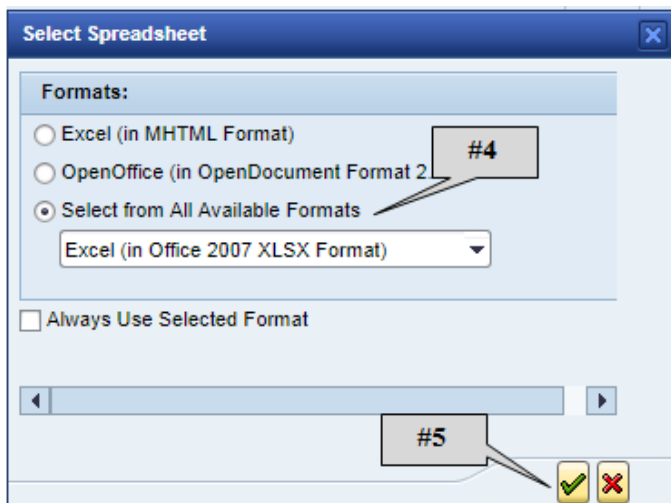
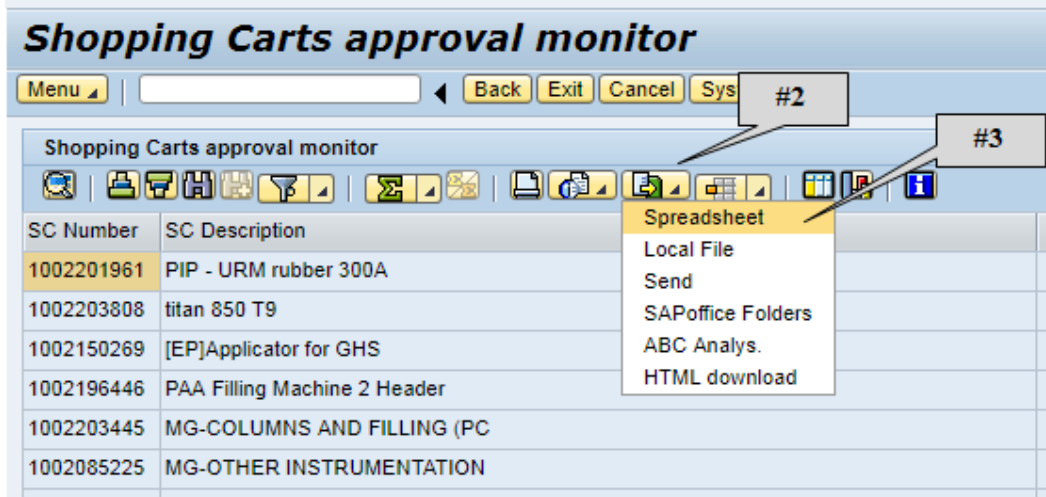
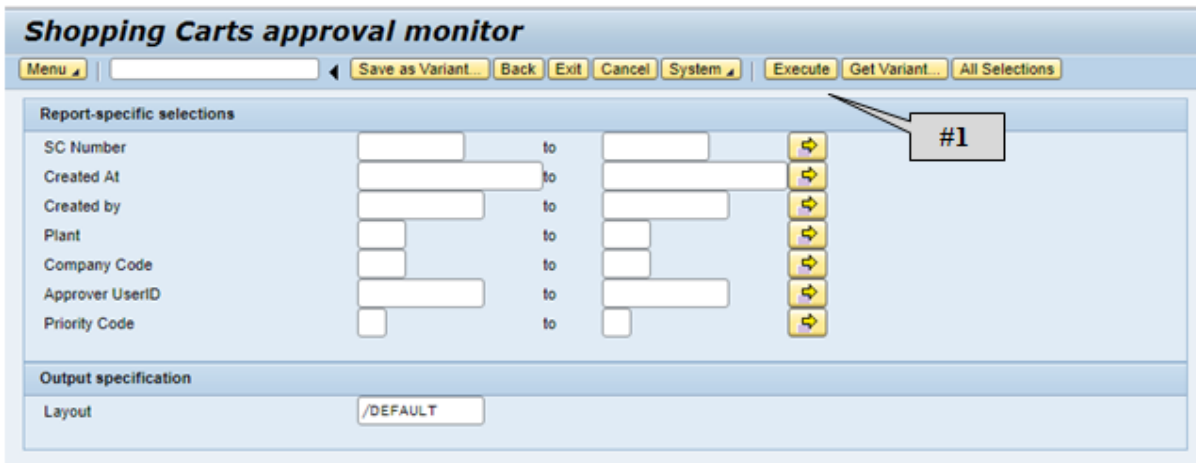
- To send the emails massively through Google Drive, it is necessary to have access to Data & Analysis mailbox (General SBS-Codif): ptp-data.analysis@solway.com

STEPS OF THE PROCESS

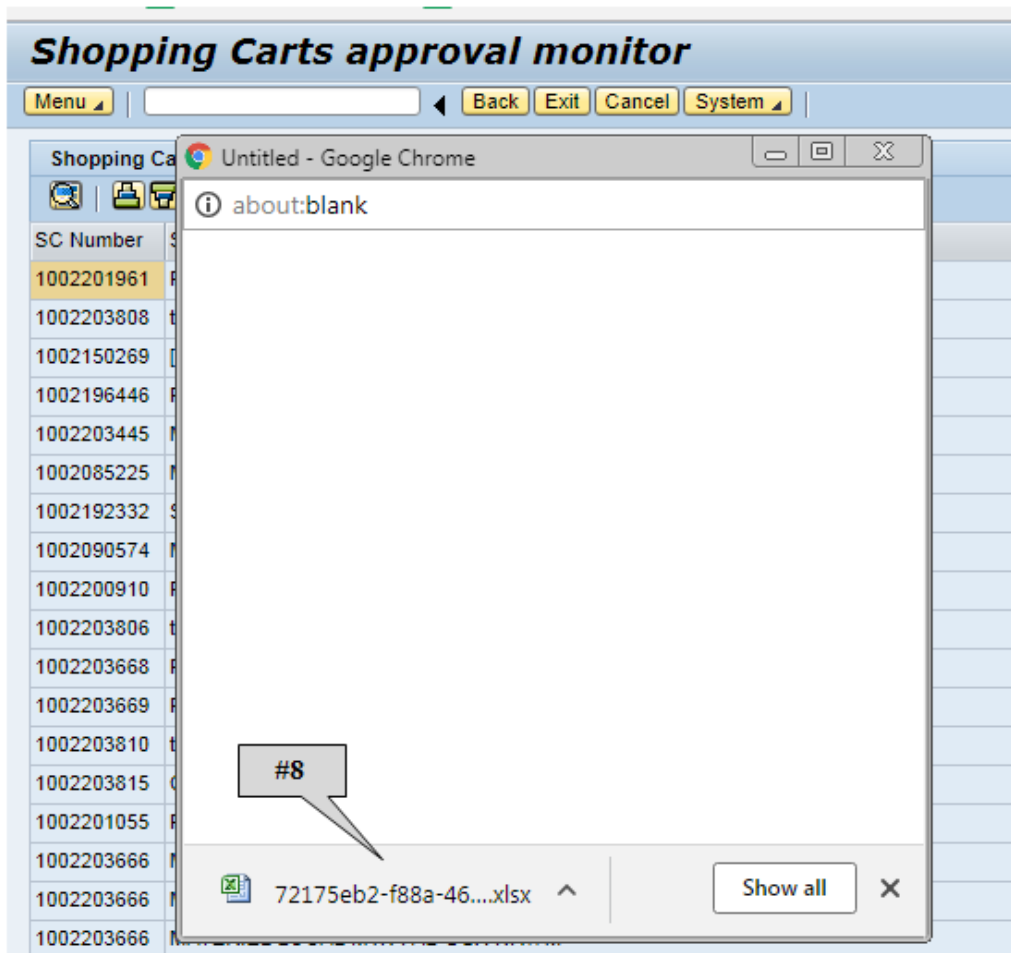
To extract the report

Go to link:

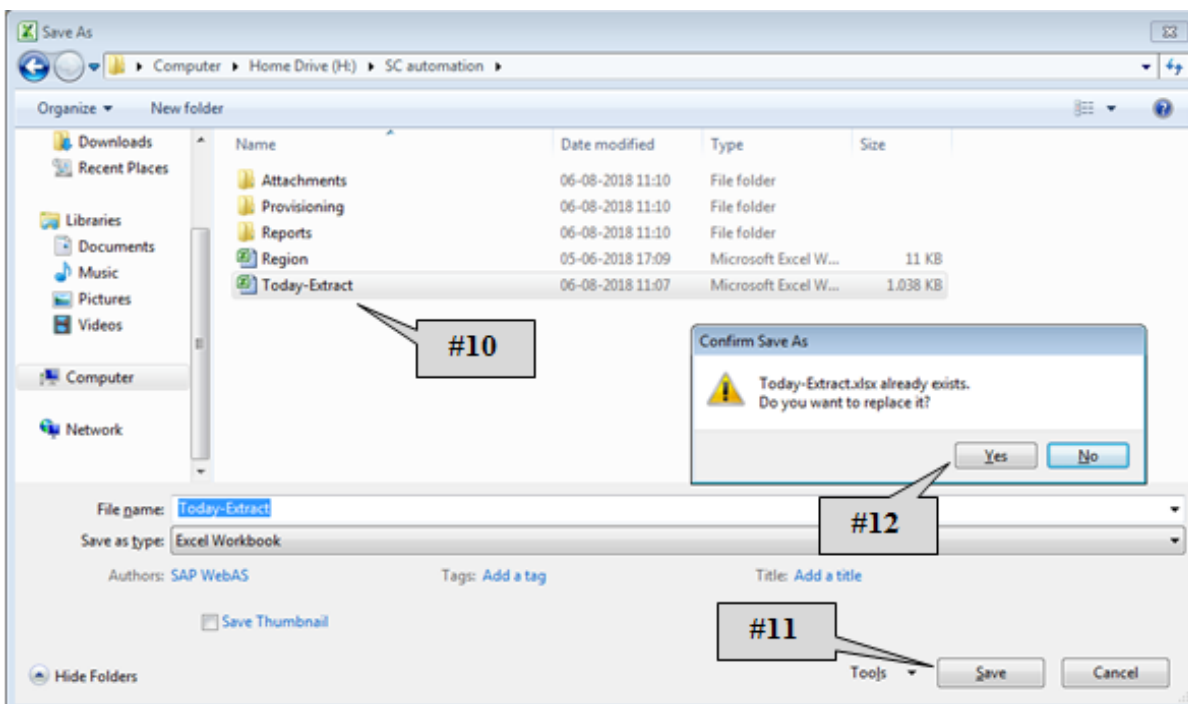
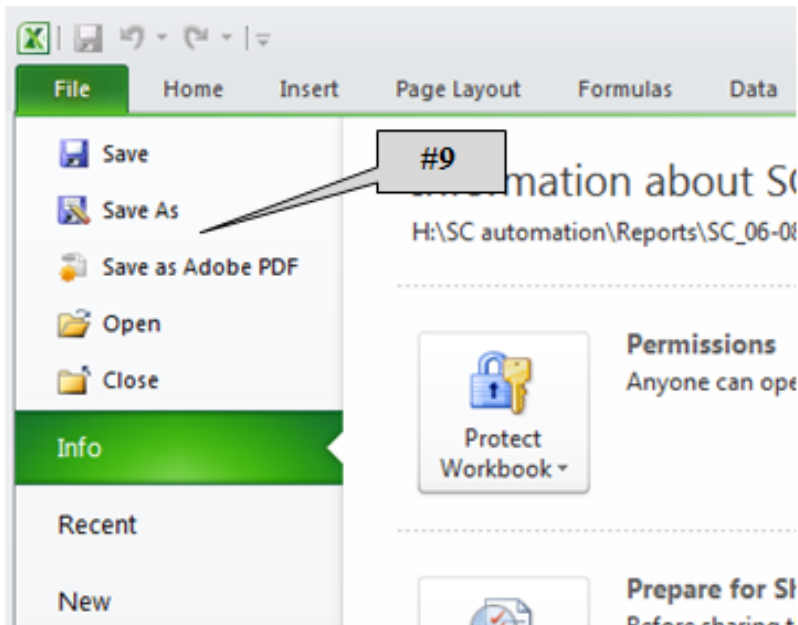
http://bp2sapr3.ibm.be.solway.com/sap/bc/gui/sap/its/webgui/?~-transaction=*START_REPORT%20D_SREPOVARI-REPORTTYPE=AQ;D_SREPOVARI-REPORT=ZW_P2P;D_SREPOVARI-EXTDREPORT=ZSC_APPROVAL;D_SREPOVARI-VARIANT=/DEFAULT;DYNP_OKCODE=OKAY&sap-client=400&sap-language=EN



#	Main activities	Tips / Best practices	Key points
1	Execute the query	Don't insert any date	
2	Select "Export"		
3	Select "Spreadsheet" type		
4	Click on "Select from All Available Formats" > select "Excel (in Office 2007 XLSX Format)"		
5	Confirm		
6	Enter a name	Insert any name. Example: 03.08.2018 The previous extractions can be deleted. Just select the line and then the trash can	
7	Select "Choose" button		



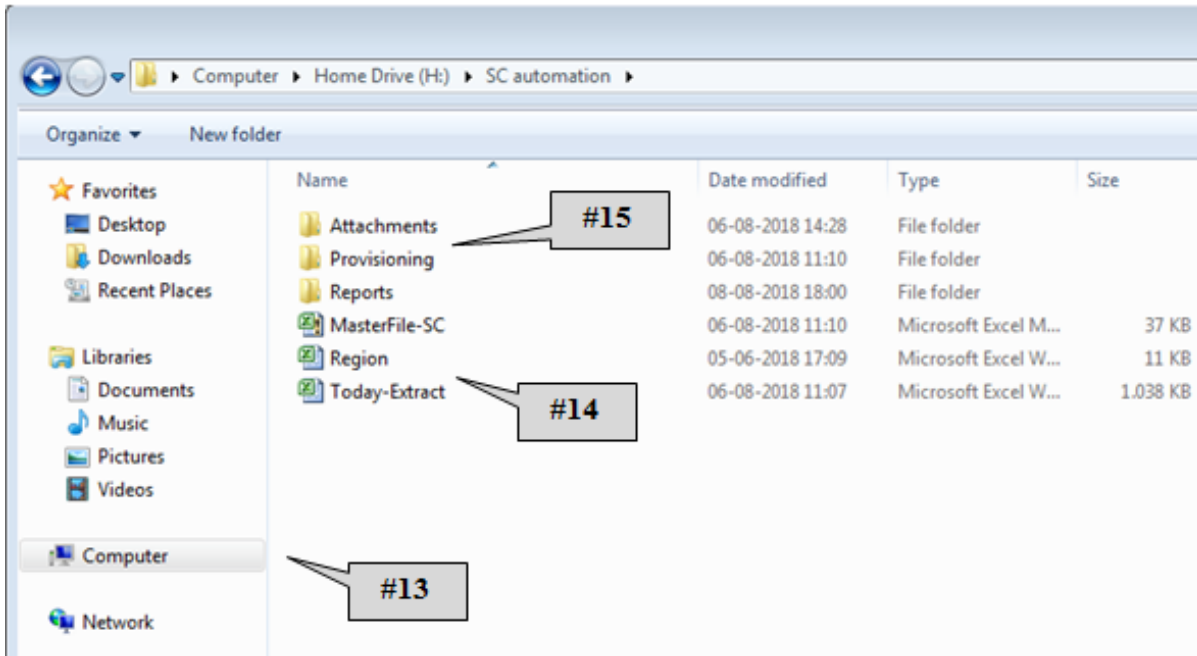
#	Main activities	Tips / Best practices	Key points
8	Open de file		<ul style="list-style-type: none"> • The file will appear in a different window. Just close it after. • Also, it will have a different name. This name doesn't matter as it will be changed after saved.



#	Main activities	Tips / Best practices	Key points
9	Go to File and select "Save As"		
10	Search for "SC Automation" folder and select the file "Today-Extract"		Find on 2.2 how "to setup the folder SC Automation on Drive H"
11	Save		
12	Select YES to replace the existent file		

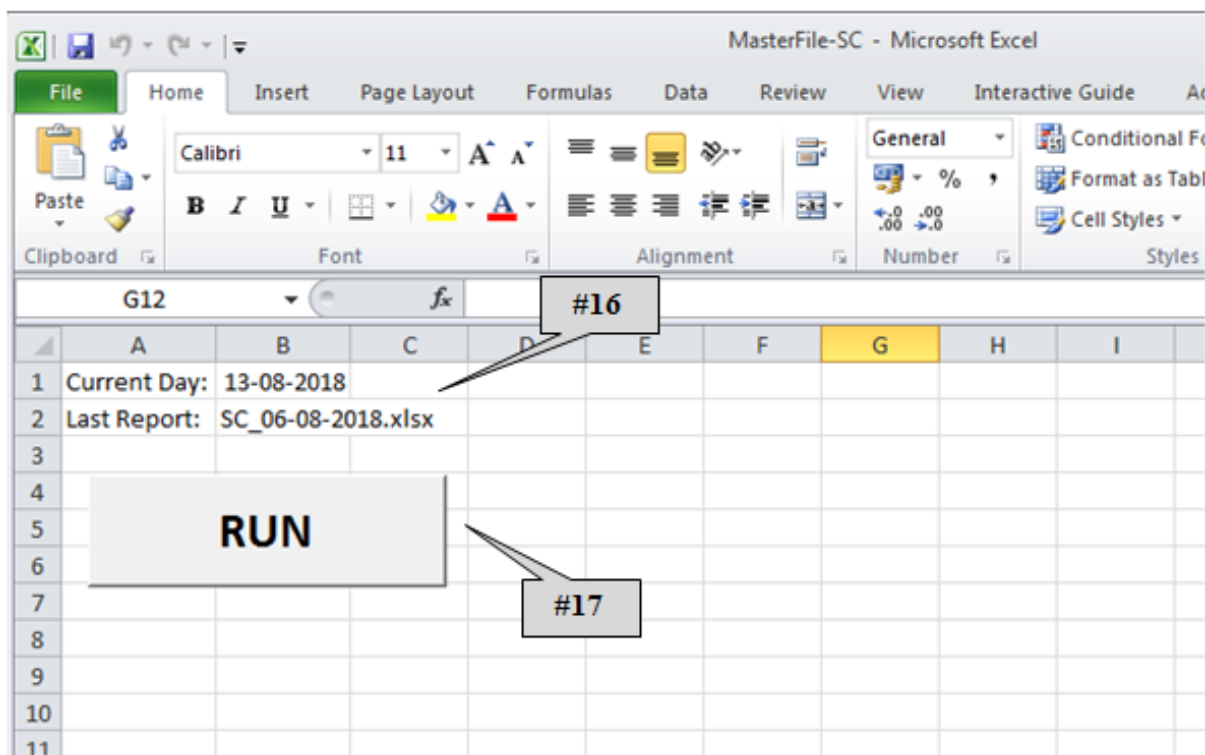
To setup "SC Automation" folder on Drive H

This process only needs to be done once.



#	Main activities	Tips / Best practices	Key points
13	Go to Computer > Home Drive H and create a folder "SC Automation"	Never change the name of any file or folder	
14	Save the files "MasterFile-SC", "Today-Extract" and "Region"		<ul style="list-style-type: none"> • MasterFile-SC: the macro to create the report; <ul style="list-style-type: none"> ◦ Today-Extract: extraction file done previously via link;* ◦ Region: contains the companies by region (file related to second reminder sent to Provisioning teams).*
15	Then create the folders "Attachments" and "Reports"		<ul style="list-style-type: none"> • "Attachments" is the folder where the attachments will be created to be sent after; • "Reports" is the folders of previous reports done.

To run the Macro "MasterFile-SC"



#	Main activities	Tips / Best practices	Key points
16	Open "MasterFile-SC.xlsm" and check "Current Day" and "Last Report"		<ul style="list-style-type: none"> • Current Day: this is programmed to appear the next day of reporting in 7 days after the last report. I must be the day which the report is been created; • Last Report: make sure the file is correct as the last report ran.
17	Press "RUN" button		<ul style="list-style-type: none"> • The current report will be created in the folder "Reports" as "SC_DD-MM-YYYY.xlsx"; • The attachments (per approver) will be created in the folder "Attachments".

Preparing the information to be sent

2.4.1 Draft email

This process only needs to be done once.

The screenshot shows an email draft in a dark-themed interface. The subject line is "Shopping Cart pending approvals" with callout box #18. The "To" field is empty with callout box #19. The "From" field is "Chagas, Perla <perla.chagas@solvay.com>". The body text includes a greeting "Hello {{First Name}} {{Last Name}}.", a paragraph about monitoring shopping carts, a list of requests, and a recommended action to approve or reject. Callout box #20 points to the "Recommended Action(s) to be taken:" section. The email ends with "Best Regards, PIP D&A Team" and contact information for the SRM7 Data & Analysis Team.

#	Main activities	Tips / Best practices	Key points
18	Don't insert any recipient		
19	Subject: Shopping Cart pending approvals		
20	Copy the layout below	Leave it as "saved" (draft)	

Email template:

Hello {{First Name}} {{Last Name}},

During the monitoring of shopping carts pending on approval, we identified that the following requests are created:

for more than 10 days, with delivery foreseen within 15 days, and / or are created for more than 15 days.

List is attached to this email.

Recommended Action(s) to be taken:

Please approve or reject the Shopping carts

Click on the following link to log on directly to SRM and carry out the action:

<https://srm7.solvay.com/NWBC>

Please find below, a guideline presentation on how to approve:

<https://drive.google.com/drive/folders/0B8wY0sDVGUzXcjVpdXI2Y1FTRWs>

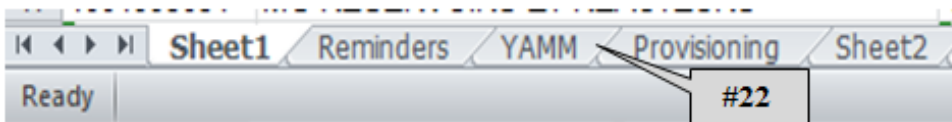
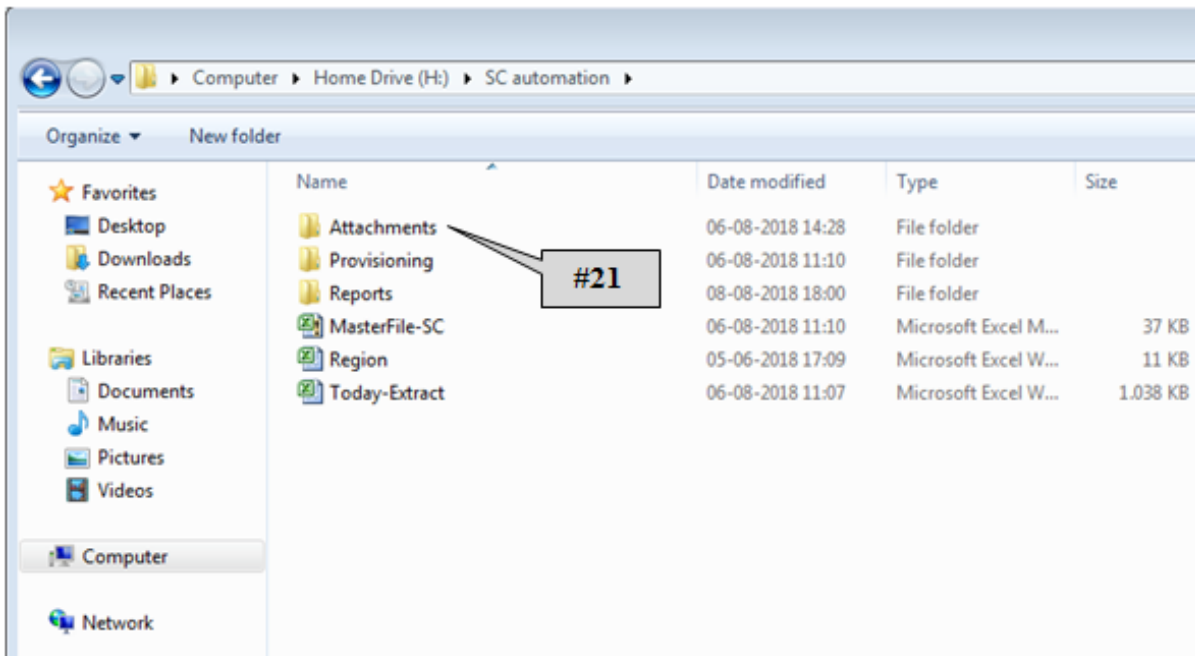
Shopping carts with status pending on approval (not linked with Plant Maintenance) and older than 60 days and delivery date in the past will be deleted.

If Shopping cart has 0 amount, the deletion will be carried out after 180 days.

In case you require any support/advice please reply to this message.

Best Regards,
PtP D&A Team

2.4.2 Copying information to GDrive



	A	B	C	D	E	F	G	H
1	First Name	Last Name	Email	Attachment				
2	Abdelkrim	Mouritany	Abdelkrim.	SC Reminder_06-08-2018_Abdelkrim Mouritany.xlsx				
3	Ademar	PASETTI	Ademar.Pa	SC Reminder_06-08-2018_Ademar PASETTI.xlsx				
4	Adrien	DEWAELE	adrien.dew	SC Reminder_06-08-2018_Adrien DEWAELE.xlsx				
5	Alexandra	ROBERT	Alexandra.	SC Reminder_06-08-2018_Alexandra ROBERT.xlsx				
6	Alise		Alise.Kam	SC Reminder_06-08-2018_Alise Kamss.xlsx				
7	Amanda	Gasparotto	Amanda.G	SC Reminder_06-08-2018_Amanda Gasparotto.xlsx				
8	Americo	LUVIZOTTO	Americo.Li	SC Reminder_06-08-2018_Americo LUVIZOTTO.xlsx				
9	An	Nuyttens	an.nuytten	SC Reminder_06-08-2018_An Nuyttens.xlsx				
10	Andre	DANG-VAN	Andre.DAN	SC Reminder_06-08-2018_Andre DANG-VAN.xlsx				
11	Andreas	LAUE	Andreas.Li	SC Reminder_06-08-2018_Andreas LAUE.xlsx				
12	Anne-Soph	PRIVOLT	Anne-Soph	SC Reminder_06-08-2018_Anne-Sophie PRIVOLT.xlsx				
13	Antoine	Pams	Antoine.Pa	SC Reminder_06-08-2018_Antoine Pams.xlsx				
14	Antonio	GONZALE	Antonio.Gr	SC Reminder_06-08-2018_Antonio GONZALEZ.xlsx				
15	Arnaud	BENOIST	Arnaud.BE	SC Reminder_06-08-2018_Arnaud BENOIST.xlsx				
16	Arnaud	DOUET	arnaud.dou	SC Reminder_06-08-2018_Arnaud DOUET.xlsx				

#	Main activities	Tips / Best practices	Key points
21	Go to "Attachments" folder on Drive H and drop all the files in "Attachments" folder on GDrive		
22	Go to "YAMM" sheet in the current report	YAMM: Yet Another Mail Merge (add-on of Google)	<ul style="list-style-type: none"> Sheet 1: all the line items in need of action, including the past ones. This will be used to verify the file of the following week; Reminders: the line items that need action but don't have a reminder yet (which will be sent by email). Reminders' rules: <ul style="list-style-type: none"> Days from Creation > 15 AND Days to Delivery > 14 Days from Creation > 10 AND Days to Delivery < 16 YAMM: information needed to run YAMM and send the emails via GDrive.
23	Copy and paste all the lines to YAMM sheet on GDrive	Start the selection from the second one	To access this sheet on GDrive: My Drive > SRM7 Team > ROUTINES > SC Approval Monitor > Automation

To send the emails massively via YAMM

#	Main activities	Tips / Best practices	Key points
24	In YAMM sheet on GDrive, select "Add-ons" button		
25	Go to "Yet Another Mail Merge" option		
26	Select "Start Mail Merge" option		

#	Main activities	Tips / Best practices	Key points
27	Name of the sender : PtP D&A		Setup done only once.
28	Email template: select the one created as draft		Setup done only once.
29	Unflag option "Track emails opened, clicked or bounced"		Setup done only once.
30	Click on "+Alias, filters, personalized attachments..."		Setup of sender email: done only once; Setup of attachments: to do every time.

Start Mail Merge ✕

Send from:

Sheet filter: Disabled. [Set up](#)

Reply-to address:

Personalized attachments: Attach files in column D to emails sent.
[Import from Drive folder](#)

Unsubscribe link: Disabled. [Set up](#)

YAMM Polls Disabled. [Set up](#)

Start Mail Merge ✕

Selected folder:

Column to check for matches:

#	Main activities	Tips / Best practices	Key points
31	Send from: ptp-data.analysis@solvay.com		Setup done only once.
32	Flag the option "Attach files in column D to emails sent"		Setup done every time.
33	Click on "Import from Drive folder"		
34	Select the folder "Attachments" of GDrive		Setup done every time.
35	Select the option "Attachment"		Setup done every time.
36	Click on "Import files"	Make sure that the quantity of imported attachments is the same of emails (rows). The alert message will appear after importation.	It will creates a link (in column D) to the attachment and the file will be sent in the email as an excel file.

Start Mail Merge ✕

📄 All files (130) imported - All rows have an attachment.

Send from:

Sheet filter: Disabled. [Set up](#)

Reply-to address:

Personalized attachments: Attach files in column D to emails sent.
[Import from Drive folder](#)

Unsubscribe link: Disabled. [Set up](#)

YAMM Polls Disabled. [Set up](#)

#37

Start Mail Merge ✕

📄 All files (130) imported - All rows have an attachment.

You can still email 1500 recipients from this add-on today. Emails will be sent to recipients in column C ([change](#)).

Sender Name:

Email Template:
[Browse more email templates...](#)

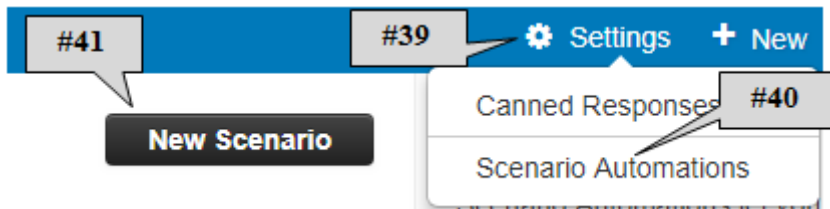
Track emails opened, clicked or bounced

[+ Alias, filters, personalized attachments...](#) #38

#	Main activities	Tips / Best practices	Key points
37	Click on "Back"		
38	Send the emails		The emails will be sent and the tickets will be automatically created on Freshdesk

Freshdesk ticket handling

Create a scenario



#	Main activities	Tips / Best practices	Key points
39	Click on "Settings"		
40	Go to "Scenario Automations"		
41	Select "New Scenario"		

Edit Scenario

Scenario Name *

SC reminders

Description

example: "Mark the Ticket as a Bug and assign to QA"

Actions

Perform these actions

-
⋮

Set Status as

Closed

-
⋮

Assign to Agent

Perla.chagas

+
Add new action

Available for :

- Myself
- All agents
- Agents in group

#45
Cancel
Save

#	Main activities	Tips / Best practices	Key points
42	Scenario Name: "SC reminders" is an example		
43	Select Action: "Set Status as" > Closed		
44	Click on "Add new action"; Select Action: "Assign to Agent" > agent name		"Available for" will be by default for the agent.
45	Save		

After the emails are sent and the tickets be created, go to Freshdesk, select all the tickets with subject "Shopping Carts pending approvals" and apply the scenario;

NOTES:

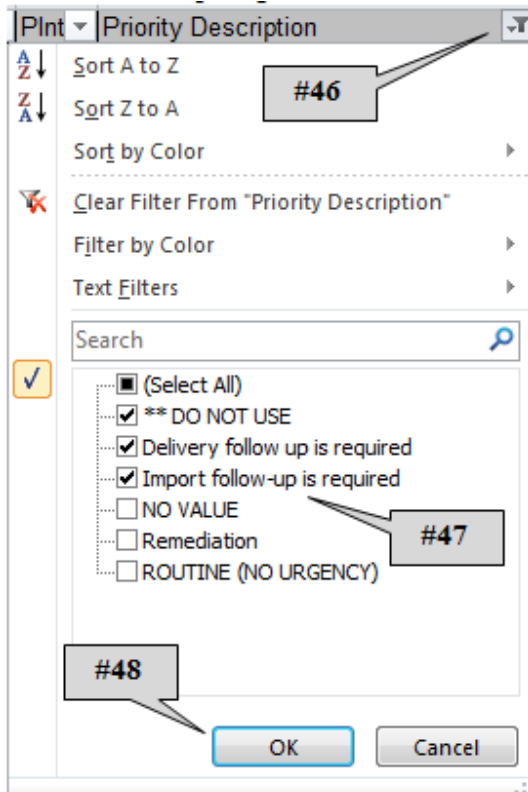
1. Pay attention to the tickets with different subject. They must remain in the queue;
2. If the email was not correct sent to the approval, it will have an automatic message saying the message was not delivered. In that case, the approval could left the company and we have to proceed with the necessary steps to correct the structure;
3. Clear the following information:
 - Attachments on both drives (GDrive and Drive H);

- YAMM on GDrive

1. Add current report to "Reports" folder in GDrive

Second Reminder – Provisioning side

In the current report, go to "Sheet 1".



#	Main activities	Tips / Best practices	Key points
46	Make a filter in column "Priority Description"		
47	Select the priorities "DO NOT USE", "Delivery follow up is required" and "Important follow-up is required"	The priorities have been updated in SRM7 tool. For now, select the option "DO NOT USE" until further information.	
48	Click ok		

A	B	C	D	E	F	G
SC Number	SC Description	Item	Item description	CoC	Print	Priority Description
1002257756	George 固 Hollowfiber Humidification syste	1	George 固 Hollowfiber Humidification syste	7728	7746	Delivery follow up is required
1002257741	XML 固 竹軒銀杏大门改造	1	XML 固 竹軒銀杏大门改造	7728	7746	Delivery follow up is required
1002261813	C1-PEÇAS P/ FIAÇÃO BARMAG-TORK-OERLIK	6	C1-1-012-0407-BIROTOR G. UNIT-ORÇ. 1761114	7523	7515	Delivery follow up is required
1002261813	C1-PEÇAS P/ FIAÇÃO BARMAG-TORK-OERLIK	5	C1-1-012-0271-BIROTOR G. UNIT-ORÇ. 1761114	7523	7515	Delivery follow up is required
1002261813	C1-PEÇAS P/ FIAÇÃO BARMAG-TORK-OERLIK	4	C1-1-011-1177-ADAPTOR CABLE-ORÇ. 1761114	7523	7515	Delivery follow up is required
1002261813	C1-PEÇAS P/ FIAÇÃO BARMAG-TORK-OERLIK	3	C1-1-011-2698-OPERAT. STATION-ORÇ. 1761114	7523	7515	Delivery follow up is required
1002261813	C1-PEÇAS P/ FIAÇÃO BARMAG-TORK-OERLIK	2	C1-1-008-4216-OPERAT. STATION-ORÇ. 1761114	7523	7515	Delivery follow up is required
1002261813	C1-PEÇAS P/ FIAÇÃO BARMAG-TORK-OERLIK	1	C1-E-001-0912-FAN GEBLAESE-ORÇ. 1761114	7523	7515	Delivery follow up is required
1002263928	Consumo gas lp p/planta	1	CONSUMO DE GAS LP PARA LA PLANTA	7723	8356	** DO NOT USE
1002261843	C1-PEÇAS P/ FIAÇÃO BARMAG-TORK-OERLIK	5	C1-A-E03-9779-DIG. MANOMETER-ORÇ. 1761531	7523	7515	Delivery follow up is required
1002261843	C1-PEÇAS P/ FIAÇÃO BARMAG-TORK-OERLIK	4	C1-A-083-2014-SOLENOID VALVE-ORÇ. 1761531	7523	7515	Delivery follow up is required
1002261843	C1-PEÇAS P/ FIAÇÃO BARMAG-TORK-OERLIK	3	C1-1-000-7878-RELIEFVALVE 1/4-ORÇ.1761531	7523	7515	Delivery follow up is required
1002261843	C1-PEÇAS P/ FIAÇÃO BARMAG-TORK-OERLIK	2	C1-A-D25-8377-DIAPHRAGM-ORÇ. 1761531	7523	7515	Delivery follow up is required
1002261843	C1-PEÇAS P/ FIAÇÃO BARMAG-TORK-OERLIK	1	C1-1-012-7783-TOOTH.B.2525-ORÇ. 1761531	7523	7515	Delivery follow up is required
1002262963	TRAVASO BM020	1	TRAVASO BM020 CON CISTERNA	0270	MSCB	Delivery follow up is required
1002236541	Contrato Friendslab_Fibras	1	Contrato Friendslab_Fibras	7523	7592	Delivery follow up is required
1002265878	MRA-Monitora/os de água subterrâneas 1	1	2 Monitora/os de água subterrânea 2018	7523	7592	Delivery follow up is required
1002261213	C1-RODO PASSA CERA E LAVA PISO	1	RODO PASSA CERA REF. 1467	7523	7515	Delivery follow up is required
1002261213	C1-RODO PASSA CERA E LAVA PISO	2	RODO LAVA PISO SEM CASO 2102	7523	7515	Delivery follow up is required
1002263847	PENEIRA E ELEVADOR HELICOIDAL L3	1	WFT 11/5-26 DV	6343	8631	Import follow-up is required
1002263847	PENEIRA E ELEVADOR HELICOIDAL L3	2	SRK 8/4-#-V	6343	8631	Import follow-up is required

Item description	CoC	Plnt	Priority Description	Net Price	Crc	Deliv. date
George 固 Hollowfiber Humidification syste	7728	7746	Delivery follow up is required	0,00	CNY	11-08-2018
XML 固 竹軒银杏大门改造	7728	7746	Delivery follow up is required	0,00	CNY	11-08-2018
C1-1-012-0407-BIROTOR G.UNIT-ORÇ. 1761114	7523	7515	Delivery follow up is required	729,00	EUR	31-07-2018
C1-1-012-0271-BIROTOR G.UNIT-ORÇ. 1761114	7523	7515	Delivery follow up is required	729,00	EUR	31-07-2018
C1-1-011-1177-ADAPTOR CABLE-ORÇ. 1761114	7523	7515	Delivery follow up is required	1212,00	EUR	31-07-2018
C1-1-011-2698-OPERAT. STATION-ORÇ. 1761114	7523	7515	Delivery follow up is required	972,40	EUR	31-07-2018
C1-1-008-4216-OPERAT. STATION-ORÇ. 1761114	7523	7515	Delivery follow up is required	548,45	EUR	31-07-2018
C1-E-001-0912-FAN GEBLAESE-ORÇ. 1761114	7523	7515	Delivery follow up is required	204,50	EUR	31-07-2018
CONSUMO DE GAS LP PARA LA PLANTA	7723	8356	** DO NOT USE	18,24	MXN	01-08-2018
C1-A-E03-9779-DIG. MANOMETER-ORÇ. 1761531	7523	7515	Delivery follow up is required	385,00	EUR	31-07-2018
C1-A-083-2014-SOLENOID VALVE-ORÇ. 1761531	7523	7515	Delivery follow up is required	54,15	EUR	31-07-2018
C1-1-000-7878-RELIEFVALVE 1/4-ORÇ.1761531	7523	7515	Delivery follow up is required	5,70	EUR	31-07-2018
C1-A-D25-8377-DIAPHRAGM-ORÇ. 1761531	7523	7515	Delivery follow up is required	11,30	EUR	31-07-2018
C1-1-012-7783-TOOTH.B.2525-ORÇ. 1761531	7523	7515	Delivery follow up is required	100,15	EUR	31-07-2018
TRAVASO BM020 CON CISTERNA	0270	MSCB	Delivery follow up is required	0,00	EUR	
Contrato Friendslab_Fibras	7523	7592	Delivery follow up is required	219000,00	BRL	
2 Monitora/os de água subterrâneas	7523	7592	Delivery follow up is required	0,00	BRL	
RODO PASSA CERA REF.1467	7523	7515	Delivery follow up is required	0,00	BRL	15-08-2018
RODO LAVA PISO SEM CASO 2102	7523	7515	Delivery follow up is required	0,00	BRL	15-08-2018
WFT 11/5-26 DV	6343	8631	Import follow-up is required	92790,00	EUR	16-08-2018
SRK 8/4-II-V	6343	8631	Import follow-up is required	13185,00	EUR	16-08-2018

#	Main activities	Tips / Best practices	Key points
49	Check with previous report if there is any pending shopping cart that wasn't sent to Provisioning team previously	Selected in red on previous file: the Provisioning teams (by region) was already notified in order to contact the approver. If the same shopping cart appears, don't send again to Provisioning.	
50	Separate by company the shopping carts to be sent according to the region		NAM: <ul style="list-style-type: none"> ○ don't send SCs from Cytec; ○ SCs from Mexico send to Provisioning LAM.

NOTES:

- For NAM, LAM and APAC regions, create a ticket and send an excel file "SC Monitoring POC list" with the pending shopping carts (example below ticket #2167311).

SC pending approval POC follow-up 13.08.2018

Perla.chagas reported a day ago (Mon, 13 Aug at 11:51 AM) via Phone

Dear team,


Following the procedure of second level of outbound for Shopping Carts pending on approval, I'm sending to you now the file for follow-up of 13.08.2018.

Please, before contact the approvers, please check if the shopping carts are already approved.

Thank you in advance for your support.

Best regards,
Perla Chagas

1 Attachment

×  SC Monitorin...
(9.71 KB)

- For EMEA region, there is a file on GDrive (link below). It's necessary to create a new tab on this file and then send an email to the following persons:

Filipe Almeida (filipe.almeida@solvay.com);

Natalia Reis (natalia.reis@solvay.com)

Nathalie Carvalho (nathalie.carvalho@solvay.com);

Ana Faustino (Ana.Faustino@solvay.com);

Carlos Antunes (carlos.antunes@solvay.com)

Vera Jacob (vera.jacob@solvay.com)

Maria Teresa Domingo (maria.domingo@solway.com)

Alfredo Serrano (alfredo.serrano@solway.com);

Link for file in GDrive: https://docs.google.com/spreadsheets/d/1B3R1nYMRFQn6jo_P5-Ps6Gteb2qWXIldTArSvGFRxRA/edit#gid=2141332566

REFERENCES

ATTACHMENTS

No document attached.

End of document