

SRM7 Purchasing Matrix Maintenance

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Table of Contents

- 1. INTRODUCTION
 - 1.1. Objectives and scope of this procedure
 - 1.2. Requirements
- 2. STEPS OF THE PROCESS
 - 2.1. To edit the matrix
 - 2.2. To add lines
 - 2.3. To delete lines
 - 2.4. Currency of reference
 - 2.5. Freshdesk ticket handling
- 3. REFERENCES
- 4. ATTACHMENTS

INTRODUCTION

Objectives and scope of this procedure

This OP explains how to maintain the Purchasing Matrix in SRM7.

Requirements

- Changes must be validated by the Purchasing Key User for the region (check on list below): https://docs.google.com/spreadsheets/d/1_5H3sPBO7bN3HJvOcx_hRUsmujwLHhYKoTXEpmRxU3M/edit#gid=2051071738
- The amount must follow the PtP Simplification: the lower threshold of 10k€ (or equivalent) is applied globally. This amount can only be changed if new Simplification rules are created.


STEPS OF THE PROCESS

To edit the matrix

Go to BP2 – transaction **SM31**

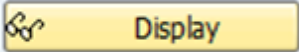
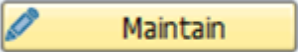
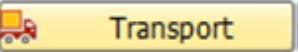

Maintain Table Views: Initial Screen

Find Maintenance Dialog

Table/View 


Restrict Data Range


No Restrictions
 Enter conditions
 Variant

 Display  Maintain  Transport  Customizing



#1

#2

Information 

 Caution: The table is cross-client

#3

#	Main activities	Tips / Best practices	Key points
1	Insert table ZWPUI036		
2	Click in "maintain" button		
3	Confirm the message		

To add lines

Change View "Purchasing Matrix": Overview

New Entries

Geo...	Category ID	Project. M	Net price	Net price	Capex	Loc
01		<input type="checkbox"/>	0,00	0,00	Empty	App
01		<input type="checkbox"/>	0,00	9.999.9...	Empty	App
02		<input type="checkbox"/>	0,00	0,00	Empty	App
02		<input type="checkbox"/>	0,00	9.999.9...	Empty	App
03		<input type="checkbox"/>	0,00	0,00	Empty	App
03		<input type="checkbox"/>	0,00	9.999.9...	Empty	App
AP	1	<input type="checkbox"/>	0,00	0,00	Empty	App
AP	1	<input type="checkbox"/>	0,00	90.000, ...	Empty	Rev
AP	1	<input type="checkbox"/>	90.000, ...	9.999.9...	Empty	App
AP	1	<input checked="" type="checkbox"/>	0,00	0,00	Empty	App
AP	1	<input checked="" type="checkbox"/>	0,00	90.000, ...	Empty	Rev
AP	1	<input checked="" type="checkbox"/>	90.000, ...	9.999.9...	Empty	App
AP	2	<input type="checkbox"/>	0,00	0,00	Empty	App
AP	2	<input type="checkbox"/>	0,00	90.000, ...	Empty	Rev
AP	2	<input type="checkbox"/>	90.000, ...	9.999.9...	Empty	App
AP	2	<input checked="" type="checkbox"/>	0,00	0,00	Empty	App
AP	2	<input checked="" type="checkbox"/>	0,00	90.000, ...	Empty	Rev
AP	2	<input checked="" type="checkbox"/>	90.000, ...	9.999.9...	Empty	App

New Entries: Details of Added Entries

Geographical Zone

Category ID

Project Mode

Net Price

Net Price

Purchasing Matrix

Capex

Local

Panel

Contractor







#	Main activities	Tips / Best practices	Key points
4	Click on New Entries		
5	Enter the region		Regions AP: Asia Pacific NA: North America LA: Latin America EU: Europe
6	Enter the domain or segment		
7	Flag the option if it is for project		

8	Enter the amounts	1 st net price for lower amount 2 nd net price for higher amount	
9	Select the action to be performed by the purchasers		Actions Empty: the system will not take in consideration Approval: the system will send the work item for approval Review: the system will send the work item for review
10	Save		

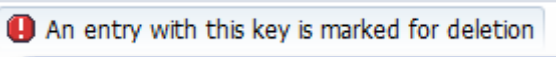
Note: after created the new line, it is possible to change the "roles" of the purchasers. However, it is not possible to change the amounts. To correct the amounts, the line must be deleted and then a new line must be created.

To delete lines

Change View "Purchasing Matrix": Overview

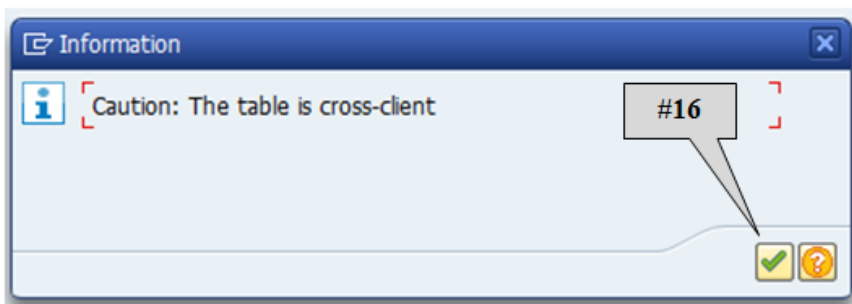
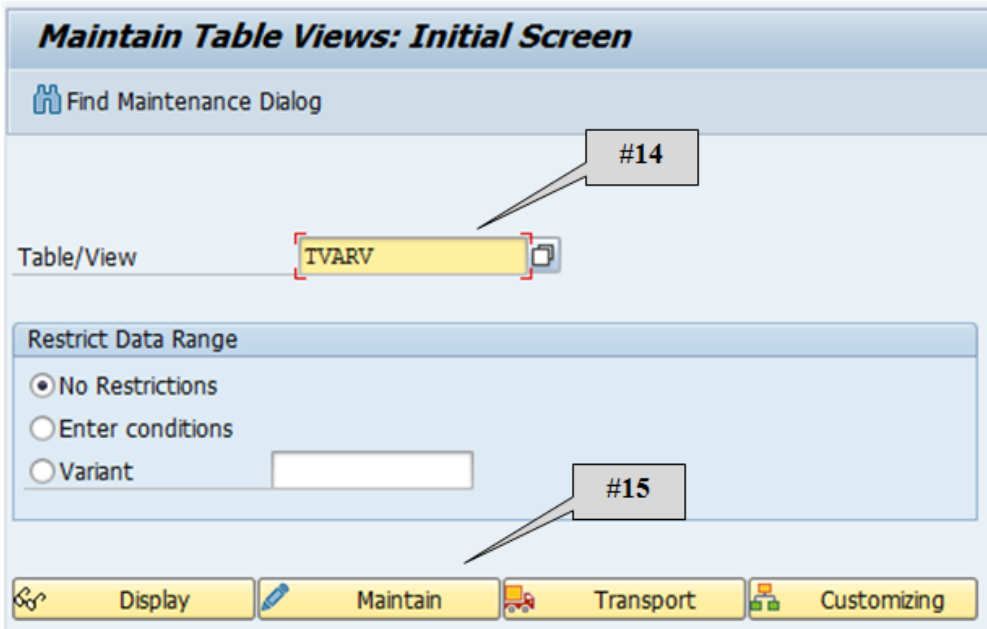
New Entries      

Geo...	Category ID	Project. M	#12	Net price	Capex	Loc
01		<input type="checkbox"/>	0,00	0,00	Empty	App
01		<input type="checkbox"/>	0,00	9.999.9..	Empty	App
02	#11	<input type="checkbox"/>	0,00	0,00	Empty	App
02		<input type="checkbox"/>	0,00	9.999.9..	Empty	App
03		<input type="checkbox"/>	0,00	0,00	Empty	App
03		<input type="checkbox"/>	0,00	9.999.9..	Empty	App
AP	1	<input type="checkbox"/>	0,00	0,00	Empty	App
AP	1	<input type="checkbox"/>	0,00	90.000, ..	Empty	Rev
AP	1	<input type="checkbox"/>	90.000, ..	9.999.9..	Empty	App
AP	1	<input checked="" type="checkbox"/>	0,00	0,00	Empty	App
AP	1	<input checked="" type="checkbox"/>	0,00	90.000, ..	Empty	Rev
AP	1	<input checked="" type="checkbox"/>	90.000, ..	9.999.9..	Empty	App
AP	2	<input type="checkbox"/>	0,00	0,00	Empty	App
AP	2	<input type="checkbox"/>	0,00	90.000, ..	Empty	Rev
AP	2	<input type="checkbox"/>	90.000, ..	9.999.9..	Empty	App
AP	2	<input checked="" type="checkbox"/>	0,00	0,00	Empty	App
AP	2	<input checked="" type="checkbox"/>	0,00	90.000, ..	Empty	Rev
AP	2	<input checked="" type="checkbox"/>	90.000, ..	9.999.9..	Emotv	App

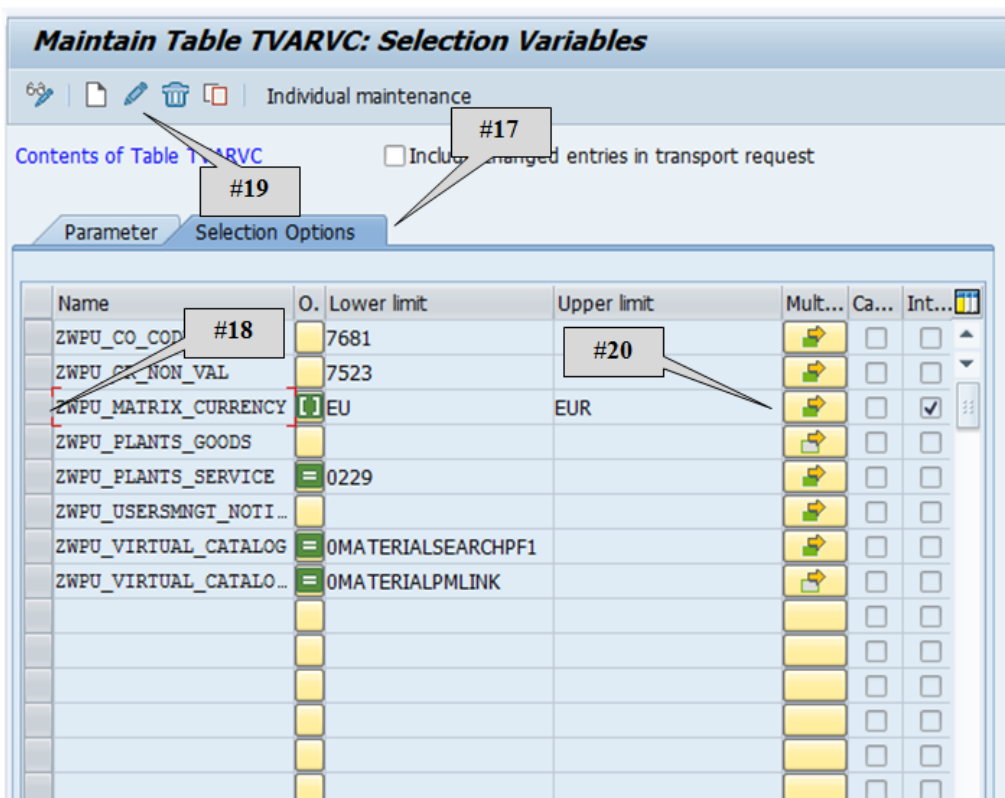
#	Main activities	Tips / Best practices	Key points
11	Select the line		
12	Click on delete button		
13	Save	Without saving first, the system will not allow to create another similar line after 	

Currency of reference

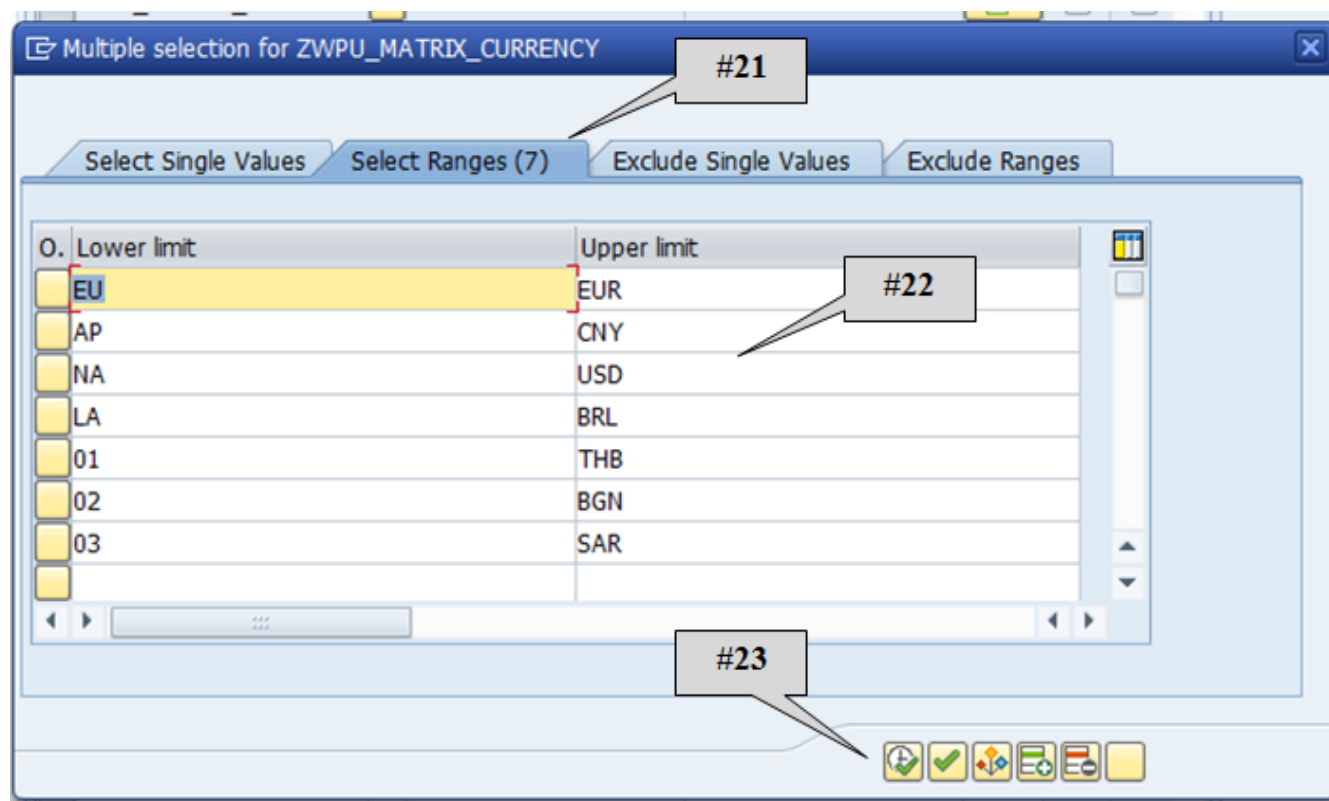
In BP2, go to transaction **SM30**, enter the table **TVARV**



#	Main activities	Tips / Best practices	Key points
14	Enter the table TVARV		
15	Click in maintain button		
16	Confirm the message		



#	Main activities	Tips / Best practices	Key points
17	Go to tab Selection Options		
18	Select the line ZWPU_MATRIX_CURRENCY		
19	Click on the pencil to make the changes		
20	Click on the button of multiple selection		



#	Main activities	Tips / Best practices	Key points
21	Go to tab Select Ranges		
22	Change the currencies		
23	Click on copy to confirm		
24	Save		

Note: this change is done only if requested/necessary.

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 (f or 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**

REFERENCES

ATTACHMENTS

No document attached.

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