

SRM7 Technical approval position

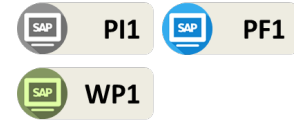
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Scope



ERP



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INTRODUCTION

Objectives and scope of this procedure

This OP explains how to create, update and delimit a Technical approval position in SRM7.

Requirements

- GENERIC users never can be assigned to an approval position.
- Check Technical Organization structure.
- Check if users, involved in the request, are created.
- BIP Application Manager requesting must create a ticket.
- Check the Application Manager on table: https://docs.google.com/spreadsheets/d/1_5H3sPBO7bN3HJvOcx_hRUsmujwLHhYKoTXEpmRxU3M/edit#gid=2051071738+

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

Create Technical approval position

The creation of the approval position consists in 2 steps.

- Creation of the approval department for the country
- Creation of the approval position in the new department

Create approval department for the country

If no department exists for the country, you have to create one first.


If the department is already created, you can proceed with the **2.1.2. Creation of the approval position.**


Go to BP2 – Tcode PPOSA_BBP

The screenshot displays the SAP 'General Attributes (EBP) Change' interface. On the left, a tree view shows the organizational structure under 'Find by' with categories like 'Organizational unit', 'Position', 'Central person', and 'User'. The 'Organizational unit' section is expanded to show 'EUROPE TECHNICAL APPROVED'. A context menu is open over this unit, listing actions: 'Goto', 'Create', 'Copy', 'Assign', 'Delimit', and 'Delete'. The 'Create' option is highlighted. A 'Choose Relationship' dialog box is open in the foreground, showing a list of relationships: 'Is line supervisor of' (Organizational unit) and 'Incorporates' (Position). The 'Incorporates' relationship is selected. The background table shows staff assignments for 'EUROPE TECHNICAL APPROVED' with columns for Code (TC EU), ID (O 5000185), Business ... (10001336), and User ID.

#6#7

#1#2#3#4#5

#	Main activities	Tips / Best practices	Key points
1	Click on the icon "  " Display/Change		
2	Click on "Structure Search"		
3	Double click on the Zone of the Country		
4	Right click on the department		


5	Select "Create"		
6	Click on the "Is line supervisor of"		
7	Click on icon "  "		

Double click on the new department and fill the necessary information:

• New organizational unit New org unit O 50051506 07.09.2

Details for Organizational unit New organizational unit

Basic Data Address Function Responsibility Attributes Attrib. Inheritance Extended Attributes

Organizational unit New org unit New organizational unit 

Valid from 07.09.2016

#1#2#3

#	Main activities	Tips / Best practices	Key points
1	Select the tab "Basic Data"		
2	Fill with ("TC" + Zone code + Country code)		All in capital letters
3	Fill with (Country + "TECHNICAL APPROVERS")		All in capital letters

Details for Organizational unit FRANCE TECHNICAL APPROVERS

Basic Data Address Function Responsibility Attributes Attrib. Inheritance Extended Attributes

Subtype Main address

Address suppl.

House no/street

City NONE

Postal code

Country FR Region

Telephone no.

Valid from 04.06.2012

To 31.12.9999

#1#2#3



#	Main activities	Tips / Best practices	Key points
1	Select the tab "Address"		
2	Fill with "NONE"		
3	Fill with Country code		

Create approval position

Go to BP2 – Tcode PPOSA_BBP

#1#2#3#4#5

#6#7

#	Main activities	Tips / Best practices	Key points
1	Click on the icon "  " Display/Change		
2	Click on "Structure Search"		
3	Double click on the Country of the position		
4	Right click on the department		
5	Select "Create"		
6	Click on the "Incorporates"		
7	Click on icon "  "		

Double click on the new position and fill the necessary information:

#1#2#3#4

#	Main activities	Tips / Best practices	Key points
1	Select the tab "Basic Data"		
2	Fill with ("TC" + Zone code + Country code + plant code and number)		All in capital letters
3	Fill with (Zone code + "TC"+ plant name + description)		Zone code and TC in capital letters
4	Tick the square "Head of own organizational unit"		This is what makes a position an approval position

Extended attributes:
Product categories

Details for Position EU TC - Belle Etoile

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

Product Categories PO Value Limits
 Locations Storage Locations

Product Categories						
Product Category	To Product Category	Src. System	Default	Deactivate	Inhe...	
0110	0111Z	BP2 SRM7 pr...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

#1#2#3#4

#	Main activities	Tips / Best practices	Key points
1	Select tab "Extended Attributes"		
2	Click on the circle "Product Categories"		
3	Enter the Product categories	Can be inserted an interval or individually	
4	Select the system (BP2_400)		

Locations

Details for Position EU TC - Belle Etoile

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

Product Categories PO Value Limits
 Locations Storage Locations

Plnts								
Partner ID	Plnt	Com...	Description	Src. System	Default	Deactivate	In...	
0100000810	7822	ZFR3	ZFR3 Belle Etoile	ECC6 WP1 c1...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

#1#2#3#4

#	Main activities	Tips / Best practices	Key points
1	Select tab "Extended Attributes"		
2	Click on the circle "Locations"		
3	Enter the plant code		
4	Select the system of the plant		

Assign user to approval position

Go to BP2 – Tcode PPOSE

Organization and Staffing Change

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Find by

- Organizational unit
- Position
 - Search Term
 - Structure Search
- Job
- User
- Task
- Object history

Hit list

Icon	Existence	Name
		EU TC - Gorzow

Staff assignments (structure) Chief

POLAND TECHNICAL AP Gabriela MACIE...

EU TC

- Goto
- Create
- Copy
- Assign
- Delimit
- Delete
- Change percentage
- Move up in rank
- Move down in rank
- Expand node
- Collapse node

07.09.2016 + 3 Mor

#1#2#4#5#3

Choose Relationship

- Position
 - Holder Central person
 - Holder Person
 - Holder User

✓ ✗

#6

User (2)

Search Term Structure Search Users by address data

Search Term

#7

User (2) 1 Entry found

Search Term Structure Search Users by address data

Object abbr.	Object name	Start date	End Date
MACIEJEWICZ	Gabriela MACIEJEWICZ	01.01.1900	31.12.9999

#8#9

#	Main activities	Tips / Best practices	Key points
1	Click on the icon " " Display/Change		
2	Click on "Search Term" and search for the position to assign the user		
3	Double click on the position		
4	Right click on the position		
5	Click on "Assign"		
6	Click on "Holder – User"		

7	Enter the user ID		
8	Tick the correct user		
9	Click on icon "  "		

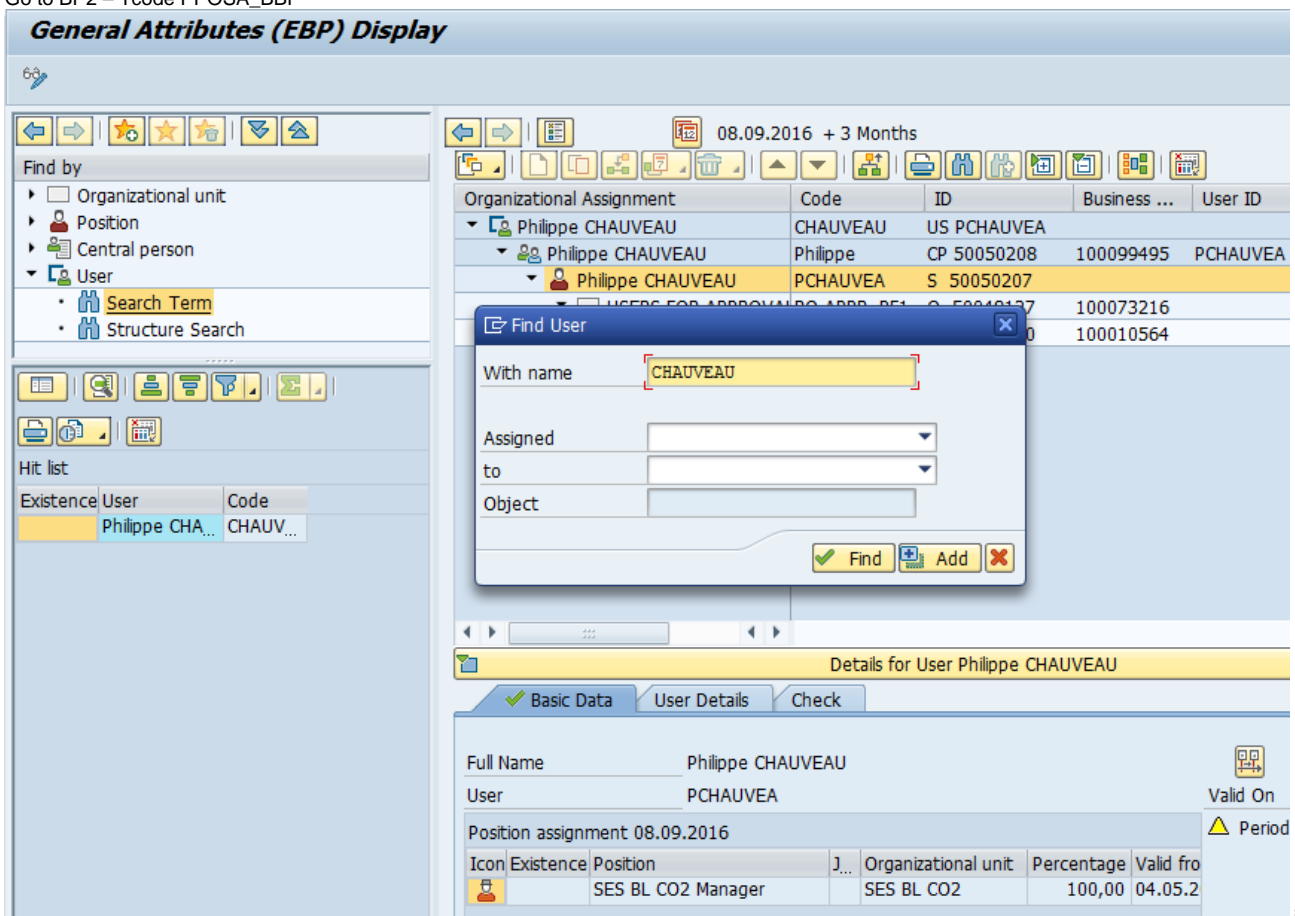
Modify approval position

Change user

Before we can change a user from a Technical approval position there are some checks that need to be done.

- **Check if user to remove has other approval position**

Go to BP2 – Tcode PPOSA_BBP



General Attributes (EBP) Display

08.09.2016 + 3 Months

Organizational Assignment	Code	ID	Business ...	User ID
Philippe CHAUVEAU	CHAUVEAU	US PCHAUVEA		
Philippe CHAUVEAU	Philippe	CP 50050208	100099495	PCHAUVEA
Philippe CHAUVEAU	PCHAUVEA	S 50050207		
US50050208	US50050208	CP 50050208		100073216
				100010564

Find User

With name: CHAUVEAU

Assigned to: []

Object: []

Buttons: Find, Add, X


Details for User Philippe CHAUVEAU

Basic Data | User Details | Check


Full Name: Philippe CHAUVEAU

User: PCHAUVEA

Position assignment 08.09.2016

Icon	Existence	Position	J...	Organizational unit	Percentage	Valid fro
		SES BL CO2 Manager		SES BL CO2	100,00	04.05.2

#1#2#3#4#5

#	Main activities	Tips / Best practices	Key points
1	Click on "Search Term" and search for the position to assign the user		
2	Enter the user ID		
3	Click on the button "  Find "		
4	Double click on the user		
5	Check the approval positions for the user		

If the user has only one position you should contact the *Application Manager* to confirm if the user is a company leaver.

If the user has several approval positions but is not leaving all of them there is no need to contact.

If the user is indeed a company leaver you need to remove him from the approval position first and after this deactivate the user. To do this please see operating procedure **SRM7 – How to Deactivate a user**.

- **Check if the user has Shopping Carts or Work items pending**

To check the shopping carts and work items please see operating procedure - **SRM7 – Transfer Shopping Carts and Work Items between users**.

- **Check if the user substitute is created on Procurement organization structure**

Go to BP2 – Tcode PPOSA_BBP

General Attributes (EBP) Display

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08.09.2016 + 3 Months

Find by

- Organizational unit
- Position
- Central person
- User
 - Search Term
 - Structure Search

Organizational Assignment

Organizational Assignment	Code	ID
Denis Mathis	Mathis	US DMAT
Denis Mathis	Denis	CP 50049
Denis Mathis	DMATHIS	S 50049
SNC BUTACHIMIE - Ch	RQ7866PI2	O 50008

Find User

With name: DMATHIS

Assigned to: [Dropdown]

Object: [Dropdown]

Find Add X

Hit list

Existence	User	Code
	Denis Mathis	Mathis

#1#2#3#4#5

#	Main activities	Tips / Best practices	Key points
1	Click on "Search Term" and search for the position to assign the user		
2	Enter the user ID		
3	Click on the button " Find "		
4	Double click on the user		
5	Check if user is created		

If the user is not created in the Procurement Organization structure you need to contact the Application Manager to confirm where to create the user in the structure.

After the confirmation you need to create the user. To create the user see operating procedure **SRM7 – How to create a user**

When you have all the information and the checks are all done, you can proceed with the change of user. To do this you will assign the substitute to the position and then delimit the user to remove.

Go to BP2 – Tcode PPOSE

Organization and Staffing Change

63

08.09.2016 + 3 Months

Find by

- Organizational unit
 - Search Term
 - Structure Search
- Position
- Job
- User
- Task
- Object history

Staff assignments (structure)

Staff assignments (structure)	Chief
POLAND TECHNICAL APPROVERS	Gabriela
EU TC - G	
Gabriel	

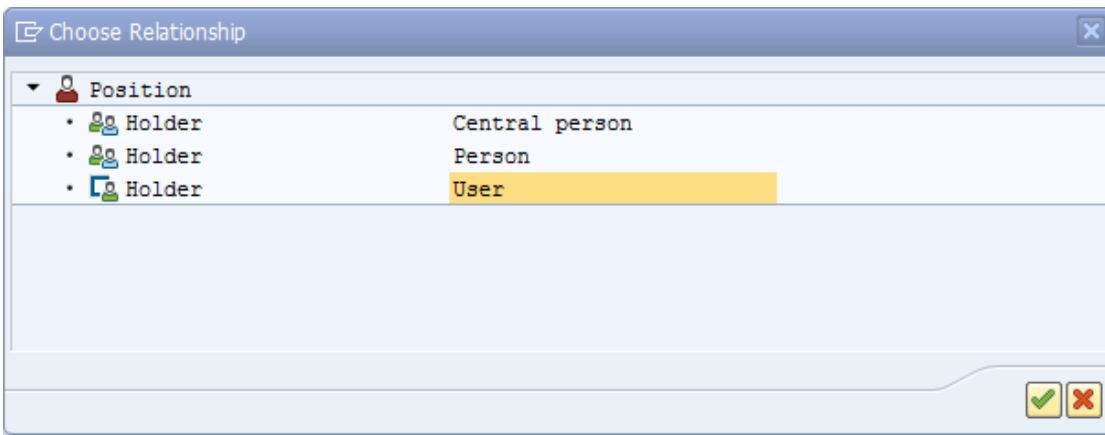
Context menu:

- Goto
- Create
- Copy
- Assign
- Delimit
- Delete
- Change percentage
- Move up in rank
- Move down in rank
- Expand node
- Collapse node

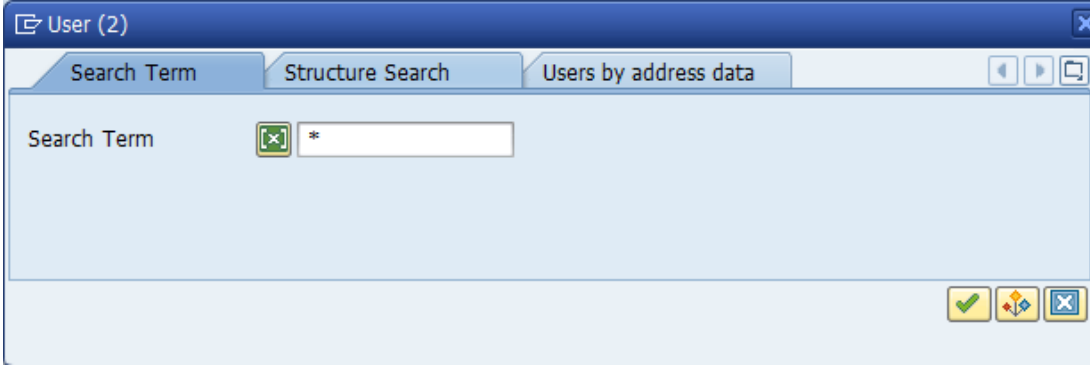
Hit list

Existence	Name	Chief...
	POLAND TECHNICAL APPROVERS	Gabriela MACIEJEWICZ

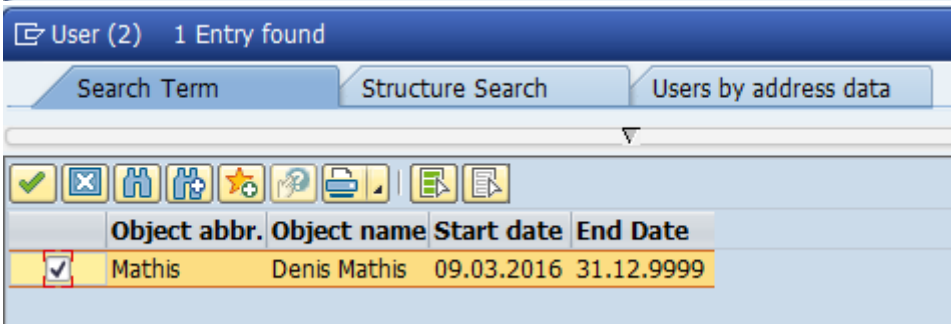
#1#2#3#4



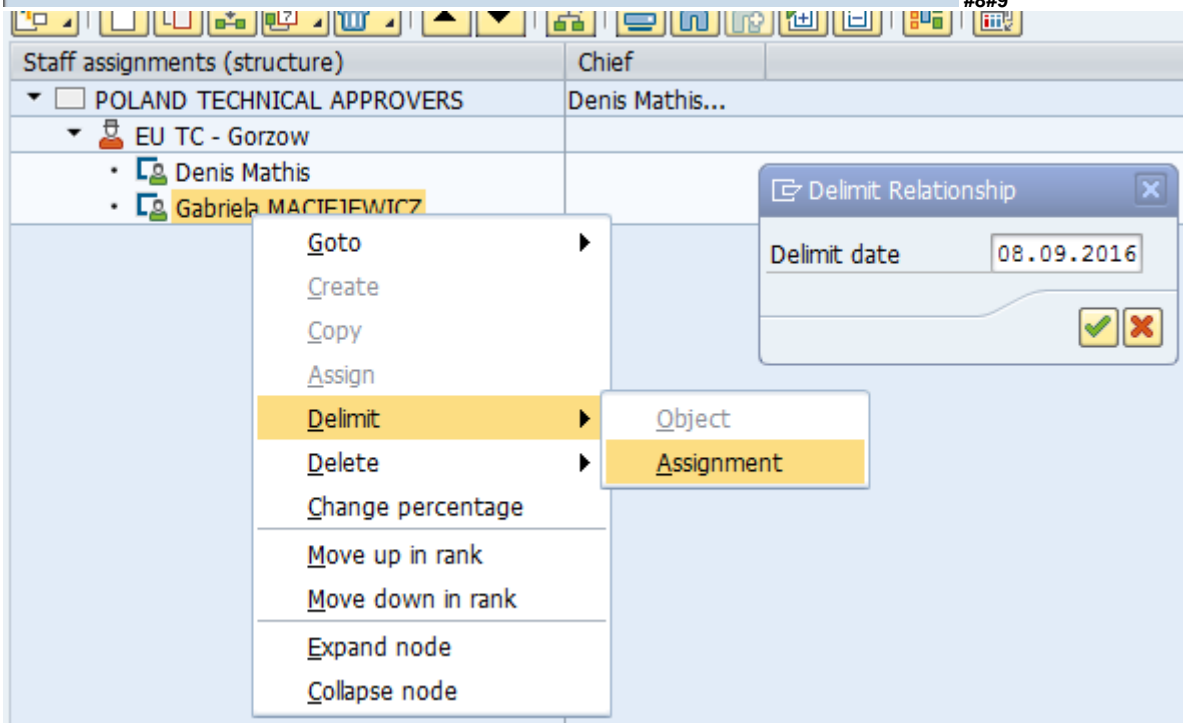
#5



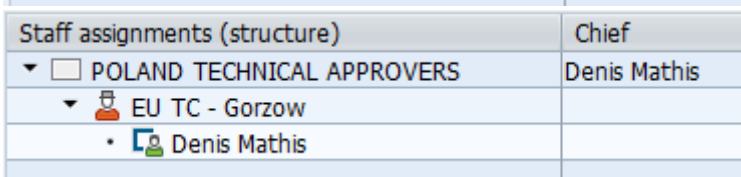
#6#7





#8#9



#10#11#12

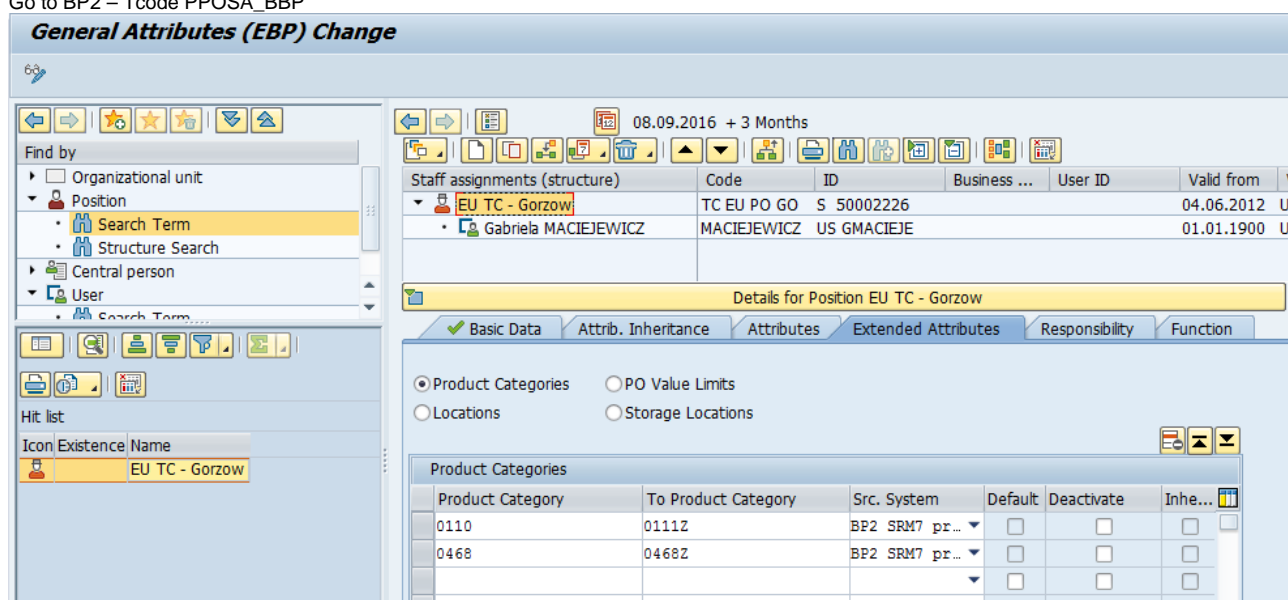


#13

#	Main activities	Tips / Best practices	Key points
1	Click on "Search Term" and search for the department above the position		
2	Double click on the department		
3	Right click on the position		
4	Click on "Assign"		
5	Click on "Holder - User"		
6	Enter the user ID		
7	Click on icon "  "		
8	Tick the square to select the user		
9	Click on icon "  "		
10	Right click on the user to remove from the position		
11	Click on "Delimit - assignment"		
12	Enter the end date	Should be a yesterday date in order to the user disappear from the position	
13	Confirm if the user to position is correct		

Change Extended attributes

Go to BP2 – Tcode PPOSA_BBP



General Attributes (EBP) Change

08.09.2016 + 3 Months

Staff assignments (structure)

Code	ID	Business ...	User ID	Valid from	V
TC EU PO GO	S 50002226			04.06.2012	Ur
Gabriela MACIEJEWICZ	MACIEJEWICZ US GMACIEJE			01.01.1900	Ur


Details for Position EU TC - Gorzow

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

Product Categories PO Value Limits
 Locations Storage Locations

Product Category	To Product Category	Src. System	Default	Deactivate	Inhe...
0110	0111Z	BP2 SRM7 pr...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0468	0468Z	BP2 SRM7 pr...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

#1#2#3#4

#	Main activities	Tips / Best practices	Key points
1	Click on the icon "  " Display/Change		
2	Click on "Search Term" and search for position		
3	Double click on the position		
4	Select the tab "Extended attributes"		On this level you can change the "Product Categories" and "Locations"

Delimit approval position

Before we can delimit a Technical approval position there are some checks that need to be done.

- **Check if user to remove has other approval position**

If the user has only one position you should contact the *Application Manager* to confirm if the user is a company leaver.

If the user has several approval positions but is not leaving all of them there is no need to contact.

If the user is indeed a company leaver you need to remove him from the approval position first and after this deactivate the user. To do this please see operating procedure **SRM7 – How to Deactivate a user**.

- Check if the user has Shopping Carts or Work items pending

To check the shopping carts and work items please see operating procedure - **SRM7 – Transfer Shopping Carts and Work Items between users.**

- Check if the extended attributes of the position to delimit are under another approver responsibility

The extended attributes "Locations" and "Product Categories" of the position should be under another position. To do this please confirm with the Application Manager to which position they should be transferred.

After the transfer you can delete the attributes of the position and proceed to delimit the position.

When you have all the checks done, you can proceed with the removal of approval position. To do this you will delimit the user from the position, delimit the position and then delimit the department if needed.

First we will delimit the user from the position


Go to BP2 – Tcode PPOSE

The screenshot displays the SAP 'Organization and Staffing Change' (PPOSE) interface. On the left, the 'Find by' section shows a search for 'POLAND TECHNICAL APPROVERS' under the 'Organizational unit' category. The 'Hit list' below shows the search results. The main area shows the 'Staff assignments (structure)' for 'POLAND TECHNICAL APPROVERS' with user 'Gabriela MACIEJEWICZ'. A context menu is open over the user, with 'Delimit' selected, and a sub-menu showing 'Assignment' highlighted. A 'Delimit Relationship' dialog box is also visible, showing the delimit date as '08.09.2016'.

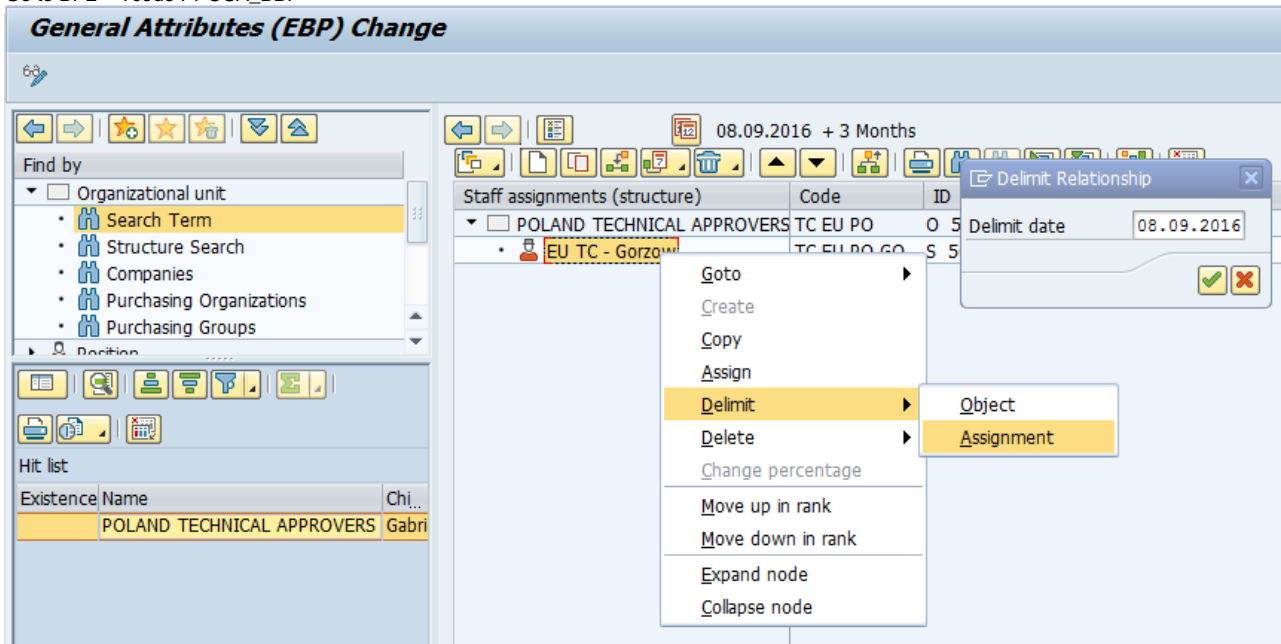
#1#2#3#4#5

#6

Staff assignments (structure)	Chief
<ul style="list-style-type: none"> <ul style="list-style-type: none"> POLAND TECHNICAL AP EU TC - Gorzow <ul style="list-style-type: none"> EU TC - Gorzow 	


#	Main activities	Tips / Best practices	Key points
1	Click on the icon "  " Display/Change		
2	Click on "Search Term" and search for the department where the position is		
3	Double click on the department		
4	Right click on the user		
5	Click on "Delimit - assignment"		
6	Enter the end date	Should be a yesterday date in order to the user disappear from the position	

Now we will delimit the position from the department and the department.
Go to BP2 – Tcode PPOSA_BBP

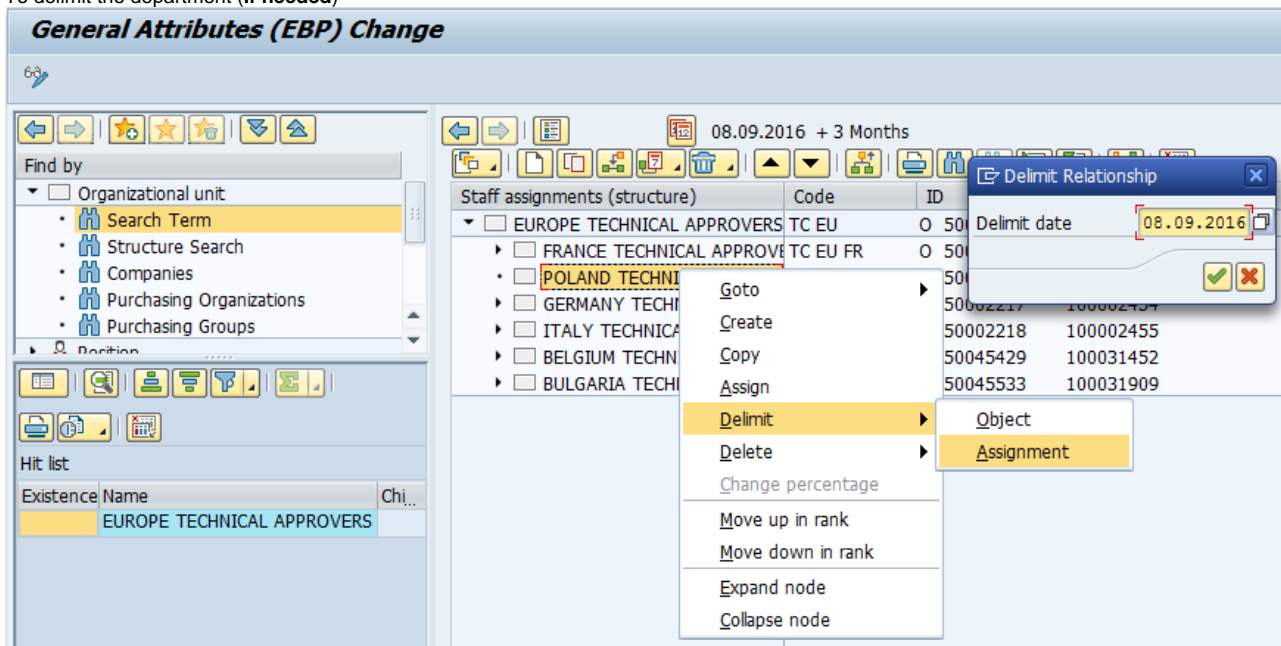


#1#2#3#4#5

#6

#	Main activities	Tips / Best practices	Key points
1	Click on the icon "  " Display/Change		
2	Click on "Search Term" and search for the department where the position is		
3	Double click on the department		
4	Right click on the position		
5	Click on "Delimit - assignment"		
6	Enter the end date	Should be a yesterday date in order to the user disappear from the position	

To delimit the department (If needed)



#1#2#3#4#5

#	Main activities	Tips / Best practices	Key points
1	Click on "Search Term" and search for the department above the department to delimit		
2	Double click on the department		
3	Right click on the department to delimit		

4	Click on "Delimit - assignment"		
5	Enter the end date	Should be a yesterday date in order to the user disappear from the position	

REFERENCES

ATTACHMENTS

No document attached.

End of document