

SRM7 Purchasing Matrix Maintenance

Author(s)	Verification	Approval
<i>Perla Chagas</i> <i>BO EU Data & Analysis Operator</i>	<i>Luís Dias</i> SRM Team Leader	<i>Sara Fonseca</i> <i>Data Manager</i> XXXXXX <i>Data & Analysis Process Expert</i>
27.06.2018	17.08.2018	22.02.2019

Version Control

Version	Date	Description
00	27.06.2018	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 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 **ZWPUT036**

Restrict Data Range

☒ No Restrictions
☐ Enter conditions
☐ Variant

Display Maintain Transport Customizing

#1 points to the Table/View field.
 #2 points to the Maintain button.

Information

Caution: The table is cross-client

#3 points to the confirmation buttons (checkmark and question mark).

#	Main activities	Tips / Best practices	Key points
1	Insert table ZWPUT036		
2	Click in "maintain" button		
3	Confirm the message		

To add lines

Change View "Purchasing Matrix": Overview

New Entries

#4

Geo...	Category ID	Project. M	Net price	Net price	Capex	Loc
01		☐	0,00	0,00	Empty	App
01		☐	0,00	9.999.9...	Empty	App
02		☐	0,00	0,00	Empty	App
02		☐	0,00	9.999.9...	Empty	App
03		☐	0,00	0,00	Empty	App
03		☐	0,00	9.999.9...	Empty	App
AP	1	☐	0,00	0,00	Empty	App
AP	1	☐	0,00	90.000, ...	Empty	Rev
AP	1	☐	90.000, ...	9.999.9...	Empty	App
AP	1	☒	0,00	0,00	Empty	App
AP	1	☒	0,00	90.000, ...	Empty	Rev
AP	1	☒	90.000, ...	9.999.9...	Empty	App
AP	2	☐	0,00	0,00	Empty	App
AP	2	☐	0,00	90.000, ...	Empty	Rev
AP	2	☐	90.000, ...	9.999.9...	Empty	App
AP	2	☒	0,00	0,00	Empty	App
AP	2	☒	0,00	90.000, ...	Empty	Rev
AP	2	☒	90.000, ...	9.999.9...	Empty	App

New Entries: Details of Added Entries

Geographical Zone **#5**

Category ID **#6**

☐ Project Mode **#7**

Net Price

Net Price **#8**

Purchasing Matrix **#9**

Capex	Empty
Local	Empty
Panel	Empty
Contractor	Empty

#	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

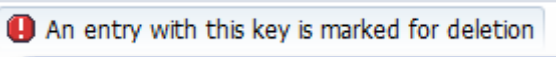
New Entries

Purchasing Matrix

Geo...	Category ID	Project. M	Net price	Capex	Loc
01		☐	0,00	0,00	Empty
01		☐	0,00	9.999.9...	Empty
02		☐	0,00	0,00	Empty
02		☐	0,00	9.999.9...	Empty
03		☐	0,00	0,00	Empty
03		☐	0,00	9.999.9...	Empty
AP	1	☐	0,00	0,00	Empty
AP	1	☐	0,00	90.000, ...	Empty
AP	1	☐	90.000, ...	9.999.9...	Empty
AP	1	☒	0,00	0,00	Empty
AP	1	☒	0,00	90.000, ...	Empty
AP	1	☒	90.000, ...	9.999.9...	Empty
AP	2	☐	0,00	0,00	Empty
AP	2	☐	0,00	90.000, ...	Empty
AP	2	☐	90.000, ...	9.999.9...	Empty
AP	2	☒	0,00	0,00	Empty
AP	2	☒	0,00	90.000, ...	Empty
AP	2	☒	90.000, ...	9.999.9...	Empty

#11 points to the 'Project. M' column header.

#12 points to the 'Net price' column header.

#	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**

Maintain Table Views: Initial Screen

Find Maintenance Dialog

Table/View **TVARV** 

Restrict Data Range

☒ No Restrictions
☐ Enter conditions
☐ Variant

 Display  **Maintain**  Transport  Customizing

#14 points to the Table/View field.
#15 points to the Maintain button.

Information

 Caution: The table is cross-client

#16 points to the confirmation buttons.

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

Maintain Table TVARVC: Selection Variables

    Individual maintenance

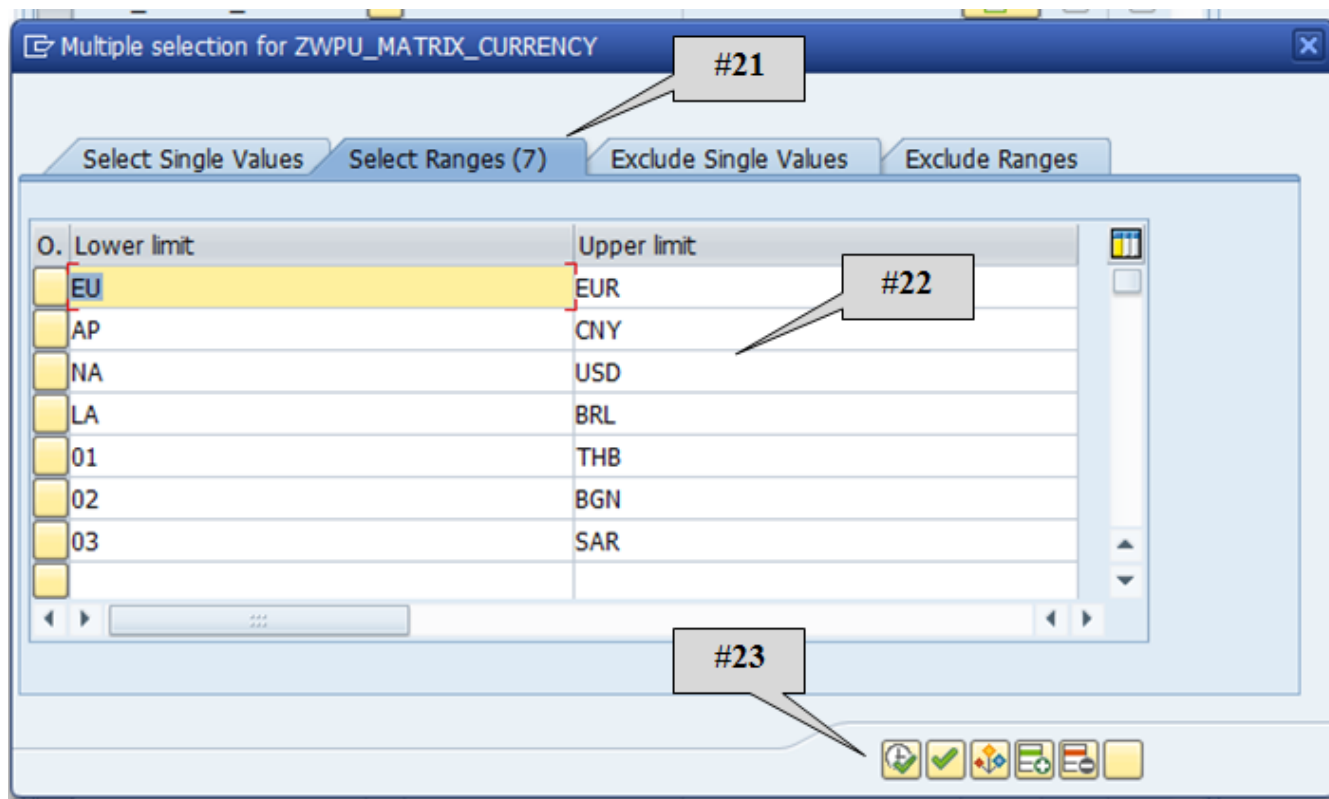
Contents of Table TVARVC ☐ Include changed entries in transport request

Parameter **Selection Options**

Name	O.	Lower limit	Upper limit	Mult...	Ca...	Int...
ZWPU_CO_COD		7681			☐	☐
ZWPU_CR_NON_VAL		7523			☐	☐
ZWPU_MATRIX_CURRENCY		EU	EUR		☐	☒
ZWPU_PLANTS_GOODS					☐	☐
ZWPU_PLANTS_SERVICE		0229			☐	☐
ZWPU_USERSMNGT_NOTI...					☐	☐
ZWPU_VIRTUAL_CATALOG		0MATERIALSEARCHPF1			☐	☐
ZWPU_VIRTUAL_CATALO...		0MATERIALPMLINK			☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐
					☐	☐

#18 points to the O. column.
#19 points to the Selection Options tab.
#20 points to the Upper limit column.

#	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.

End of document