

SRM7 - Update the financial matrix

SRM7 - Update the financial matrix

>> Back to [Data & Reporting](#) home page

- [How to determine the approval limit ?](#)
- [How to create an approval position ?](#)
- [How to modify an approval position ?](#)
- [How to remove an approval position ?](#)
- [How to transfer the cost centers to a new approval position ?](#)
- [How to submit a request to the SRM7 team ?](#)

When creating a request to update the SRM7 structure, the best way is to provide the Financial structure file with the intended modifications.

The file contains every information needed to make the creation, modification or removal in the structure. By indicating on the file the necessary information, the SRM7 team should be able to make the changes more quickly without back and forth.

Reminder

Detailed procedure to extract the [SRM7 financial matrix](#)

How to determine the approval limit ?

The approval limit should follow the threshold table:

The table has 13 levels of approval. The level 0 is not an approval limit, it is an output limit (value to which the shopping cart can be created without the need to be financially approved).

On the financial structure hierarchy, the approval limits need to be defined according to the level of the position. The higher position needs to have always a higher approval limit than the position below.

Example:

NOV WW R&D DEPARTEMENT	O	50003675						
NOV WW R&D Vice President	S	50003676	1,000,000	EUR	X	MARCHAN JPMARCH Jean-Pierre		
NOV WW R&D Best practices	O	50003677						
NOV WW R&D Best practices manager	S	50003678	100,000	EUR	X	FERLIN Pa S8662129 Patrick.FER		
NOV WW R&D EXPERT	O	50003677						
NOV WW R&D Engineer	S	50003678	50,000	EUR	X	CASTAING JCASTAIN Jean-Chris		
NOV FR R&D APPLICATION SPECIALIST	O	50003680						
NOV FR R&D Engineer	S	50003681	5,000	EUR	X	FARHOOSI RFARHOOSI ROYA.FAR		
NOV AP R&D DEPARTEMENT	O	50003682						
NOV AP Manager of AP Application L	S	50003683	200,000	SGD	X	CRISTOBA GCRISTOB Galdier.CRI		
NOV SG R&D LAB AP POLYMERISATION	O	50003685						
NOV SG R&D Lab Manager	S	50003686	9,000	SGD	X	XU Frank FXU1 Frank.XU@		

How to create an approval position ?

When requesting the creation of Financial approval position in SRM7 the following information is needed:

- Name of Position Department and Approval Position
- [Approval limit](#)
- User information (Name, ID and Email)

Example:

Add a line to the file for the Department and Position.



ORGANIZATIONAL UNITS AND POSITIONS					ORGID	Approval limit	Currency	No Delegation	User	Login	e-mail address	Suppliance
NOVE CARE Gbu					O	50000107						
NOVE CARE President					S	50000108	65.000.000	USD	X	BUTSTRAL	EBUTSTRAL	Emmanuel
NOV NA LEGAL					O	50047307						
NOV NA Legal Lead Attorney					S	50047308	130.000	USD	X	SAVIANO A	ASAVIANO	Anthony Sai
NOV NA LEGAL AND COMPLIANCE					O	50047309						
NOV NA LEGAL AND COMPLIANCE Attorney					S	50047310	65.000	USD	X	CLASSON G	GCLASSON	Gregory Cl
NOV NA LEGAL IAM					O	50047311						
NOV NA LEGAL IAM Attorney					S	50047312	65.000	USD	X	CROS Phil	PCROS	Philippe Cr
NOV WW FINANCIAL					O	50003623						
NOV WW Financial Manager/VP of Finance					S	50003625	3.900.000	USD	X	DAUMAS S	SDAUMAS	Sandrine D
NOV WW BUSINESS					O	50003659						
NOV WW Business Controller					S	50003660	13.000	USD	X	SIMON Ste	SSIMON2	Stephane S
Add NOV EU BUSINESS					O							
Add NOV EU Business Analyst					S		5.000	EUR	X	CARMEL M	MCARMEL	Moshe Car

 Submit your request to the SRM7 team

How to modify an approval position ?

Sometimes it can be necessary to make some modifications on the Position.

The modifications can be the following:

- Change the [approval limit](#)
 - Indicate the new approval limit for the position
- Change Approver name of the position code
 - Indicate the new approver for the position
- Move Department/position
 - Indicate in the file the new place for the position

Example:



ORGANIZATIONAL UNITS AND POSITIONS					ORGID	Approval limit	Currency	No Delegation	User	Login	e-mail address	Suppliance
NOVE CARE Gbu					O	50000107						
NOVE CARE President					S	50000108	65.000.000	USD	X	BUTSTRAL	EBUTSTRAL	Emmanuel
NOV NA LEGAL					O	50047307						
NOV NA Legal Lead Attorney					S	50047308	130.000	USD	X	SAVIANO Anthony	ASAVIANO	Anthony.Saviano@soyay.com
Modify NOV NA LEGAL AND COMPLIANCE					O	50047309						
NOV NA LEGAL AND COMPLIANCE Attorney					S	50047310	65.000	USD	X	CLASSON Gregory	GCLASSON	Gregory.CLASSON@soyay.com
Move from line 12 NOV NA LEGAL IAM					O	50047311						
Move from line 13 NOV NA LEGAL IAM Attorney					S	50047312	65.000	USD	X	CROS Philippe	PCROS	Philippe.CROS@soyay.com
NOV WW FINANCIAL					O	50003623						
NOV WW Financial Manager/VP of Finance					S	50003625	3.900.000	USD	X	DAUMAS Sandrine	SDAUMAS	Sandrine.DAUMAS@soyay.com
NOV NA LEGAL IAM					O	50047311						
NOV NA LEGAL IAM Attorney					S	50047312	65.000	USD	X	CROS Philippe	PCROS	Philippe.CROS@soyay.com
NOV WW BUSINESS					O	50003659						
NOV WW Business Controller					S	50003660	13.000	USD	X	SIMON Stephane	SSIMON2	Stephane.Simon@soyay.com

 Submit your request to the SRM7 team

How to remove an approval position ?

When requesting the removal of a user in SRM7 the following information is needed:

Necessary information:

- Department/position
- Indicate if the user is a Company leaver (can be indicated on the description of the request)
- Inform to whom the pending Work items (shopping carts pending on approval) should be transferred. Please note that Work items that are not transferred would not be processed and the order will not proceed.

The position cannot be removed if is linked to an active Cost Object (Cost center/WBS code).

- How to transfer the cost centers to a new approval position ?

Example:

ORGANIZATIONAL UNITS AND POSITIONS				CRGD	Approval limit	Currency	No Delegation	User	Login	e-mail address	Supplance
NOV/CARE Gbr				0	5000107						
NOV/CARE President				0	5000110	85,000,000 USD	X	BOUSTRALNE Emmanuel	BOUSTRALNE	Emmanuel.Boustralne@schwey.com	
NOV NA LEGAL				0	50047307						
Modify NOV NA Legal lead Attorney				0	50047308	130,000 USD	X	SAUVANOS Anthony	ASAVANOS	Anthony.Sauvanos@schwey.com	
NOV NA LEGAL AND COMPLIANCE				0	50047309						
Modify NOV NA LEGAL AND COMPLIANCE Attorney				0	50047310	65,000 USD	X	CLASSON Gregory	GCLASSON	Gregory.Classon@schwey.com	
Move from line 12 NOV NA LEGAL LM				0	50047311						
Move from line 13 NOV NA LEGAL RM Attorney				0	50047312	65,000 USD	X	CROUS Philippe	PCROUS	Philippe.CROUS@schwey.com	
NOV WW FINANCIAL				0	5000252						
NOV WW Financial Manager/VP of Finance				0	5000255	3,000,000 USD	X	DAUMAS Sandrine	SDAUMAS	Sandrine.DAUMAS@schwey.com	
Move to line 8 NOV NA LEGAL LM				0	50047311						
Move to line 9 NOV NA LEGAL RM Attorney				0	50047312	65,000 USD	X	CROUS Philippe	PCROUS	Philippe.CROUS@schwey.com	
NOV WW BUSINESS				0	5000350						
NOV WW Business Controller				0	5000350	13,000 USD	X	SIMON Stephane	SSIMON2	Stephane.Simon@schwey.com	



Submit your request to the SRM7 team

How to transfer the cost centers to a new approval position ?

The approval position can only be removed from the structure if no active Cost Object (cost center/WBS code) is linked to the position.

If the Position is linked to any active cost object it needs to be deactivated or transferred to another position.

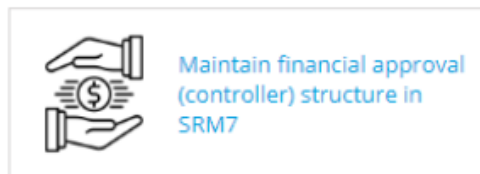
Procedure to request the update of the approval position of a cost center: [Request the creation / update of Master Data](#)

How to submit a request to the SRM7 team ?

The requests to the SRM7 must be done via [Service One](#)

In [Service One](#), the service *Maintain financial approval (controller) structure in SRM7* can be found in the catalog:

>> Procurement >> Procurement Data & Analytics >> Structures for provisioning



1. Attach the modified excel structure file to the ticket (see "+ Attach files" icon).
2. When the request is created, the SRM team will proceed with the necessary actions.
3. After that the ticket requester will be informed accordingly.

Upload (Excel file)



Attach Files

or drag and drop files here