DP - User Management

- DynaSys users
- User creation in DynaSys
    - User scope and role
    - User roles and type of accesses per GBU
    - User DynaSys server access
    - User Group mailing
- Sales Manager/Sales Employee creation
- DynaSys user creation details per GBU
    - Aroma
        - Demand Planner
        - Sales Representative
        - Global Key Account Manager (GKAM)
    -

4.TECHNOLOGY SOLUTIONS
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- RSD
- PRICING TEAM
- DEMAND PLANNER
- PRODUCT MANAGER

5.NOVECARE
- Sales Employee
- Customer Service Rep. CSR (not currently used by Novecare)
- S&OP Planner
- S&OP Leader
- Global Key Account Manager (GKAM) / Regional Key Account Manager (RKAM)
- Regional Market Director (RMD) / Business Development Manager (BDM)

7.Composites
- Demand Planner
- PMI
- PMI Admin
- Regional Sales Manager
- Account Manager

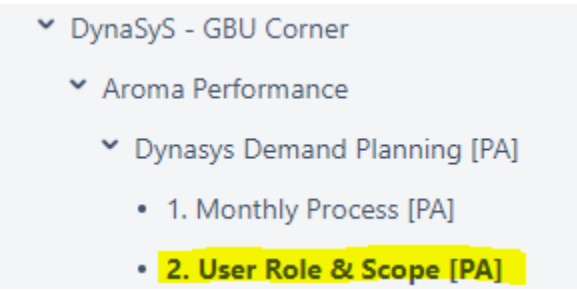
8. Oil&Gas
- Sales Employee
- S&OP Planner
- S&OP Leader

DynaSys users

Different users have accesses to DynaSys, below is a global overview of the main roles and action in the system :

Role	Responsibility
Sales Employee (Sales Manager / Account Manager)	Update Sales Team forecasts for its Material x Ship-To (based on its portfolio defined in SAP- Sales group/Account manager)
Sales Assistant (CSR/CSS)	Update Customer/CSR forecasts for its Material x Ship-To (based on its portfolio defined in SAP))
Global Key Account Manager	View the forecast for the global scope he is in charge of (Customer group (=Key Account), Product range...)
Demand Planner (S&OP Manager)	Key Users of the tool : Manage the DFUs life cycle, Review the statistical forecast, Validate the final forecast for its scope
Controlling (Finance)	Review the Budget/MTP

Each GBU may have different roles. More details are available in the Wiki DynaSys GBU Corner pages :



User creation in DynaSys

- **User scope and role**

A User will have at least one Role and one Scope :

- the Role depends on his fonction and define which workspaces, models and shortcuts he can access
- the Scope defines which DF/data he has access to

Each user will have :

- One (or many) role(s)
- One (or many) scope(s)
- One profile (viewer, global planner…)

Each role/scope will be defined through a User Group.

The steps to create a new user are :

- Create User

Note : Avoid to re-use an old user for traceability/connection dashboard except if the user was deleted for more than 1 year (Refer to the YY.MM in the user name)

- Create scope User group(s)

Note : Don't duplicate User group to avoid to duplicate the security

- Define security for the User group(s) scope
- Assign User group(s) scope to the new user
- Assign User group(s) role to the new user

Each role is linked to :

- Workspaces,
- Shortcuts,
- Calculations
- Write/Read on models

The Security is set-up in the Workspace, the Forecast/User models and the Shortcuts.

The User group to assign a role to a user are generally defined during the project phase. No new user group for a role should be defined for a new user creation.

- **User roles and type of accesses per GBU**

When receiving a request for an access, the first step is to collect all required information :

- User Name
- Windows ID
- GBU
- Role (refer to list below)
- Scope (refer to list below)

GBU	Database	Role	Scope	Model security	User profile	Type of access
AROMA PERFORMANCE	DP1	Demand Planner	Zone		Global Planner	Remote
		Sales Rep.	Sales group code (WP1) Account Manager code (PF1)		Collaborator	Remote *(Migration to web in progress)*
		Global Key Account Manager	GBU Ship-To Group name/code		Viewer	Remote *(Migration to web in progress)*
COMPOSITE	DP2	Demand Planner	All		Global Planner	Remote
		Account Managers	Forecast Customers		Collaborator	Web
		PMI Users	Primary / Secondary / Other Sales Coordinators		Collaborator	Web

NOVECARE	DP3	S&OP Manager	Windows Login + set-up by Main Shipping plant / Main Production plant	U00 - Impot - IN U99 - Export - OUT x. Supersession x. Master Tables Update x. Users Scope Management y. GBU - NOVECARE z. MTP / Commercial RoadMap z. Budget	Global Planner	Remote
		Sales Manager	Sales group code (WP1) Account Manager (PF1)	U00 - Impot - IN x. Supersession x. Users Scope Management y. GBU - NOVECARE z. MTP / Commercial RoadMap z. Budget	Collaborator	Web
		Sales Assistant (CSR - Customer Service Representative)	ZI Partner code (WP1) CSS Representative code (PF1)	U00 - Impot - IN x. Supersession x. Users Scope Management y. GBU - NOVECARE z. MTP / Commercial RoadMap z. Budget	Collaborator	Web
		Global Key Account Manager	Ship-To KA name/code	U00 - Impot - IN x. Supersession x. Users Scope Management y. GBU - NOVECARE z. MTP / Commercial RoadMap z. Budget	Viewer	Web
		RMD (Regional Market Director)	Zone and BfC Market	U00 - Impot - IN x. Supersession x. Users Scope Management y. GBU - NOVECARE z. MTP / Commercial RoadMap z. Budget	Viewer	Web

		BDM (Business Development Manager)	Zone and BfC Market	U00 - Impot - IN x. Supersession x. Users Scope Management y. GBU - NOVECARE z. MTP / Commercial RoadMap z. Budget	Viewer	Web
TS	DP1	Demand Planner	Zone + BU		Global Planner	Remote
		Product Manager	Manually set-up		Collaborator	Web
		Sales Rep.	Sales group code (WP1)		Collaborator	Web
		RSD	List of Sales Rep.		Collaborator	Web
		Pricing Team	Full GBU		Collaborator	Remote

- Security user model

Security user model DP3 (1).xlsx

- **User creation**

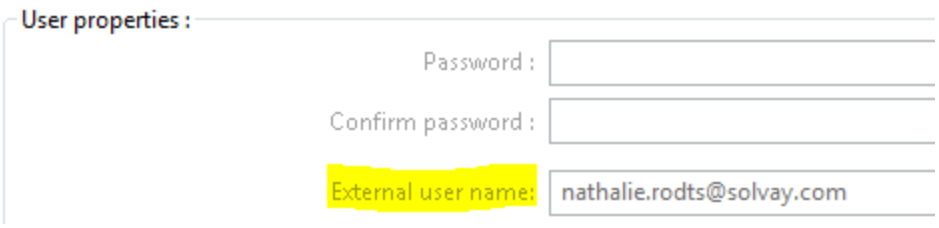
User description naming should follow the rule below :

GBU / Role / Country code / LAST and first name

Examples :

Name	Description
ACEVEDOD	TS / SREP / CL / ACEVEDO David
ACHEN	SP / Sales Manager / CN / CHEN Arthur
ACOGNET	CH / DP / FR / VANESSE Anne
ACOGNET	CH / Viewer / FR / VANESSE Anne
ADAMSK	TS / DRP / UK / ADAMS Kate
ADAS	CH / SREP / IN / DAS Ashish
ADENG	CS / SREP / CN / DENG Weiqing (Aleen)

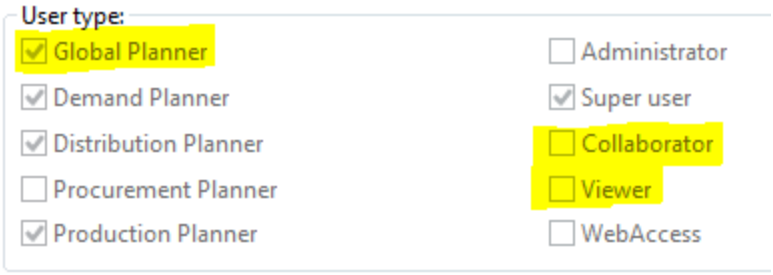
The email of the user should also be registered in the External user name :



The available user types for the GBU users are :

- Global Planner for Demand /S&OP Planners
- Collaborator for Sales Manager
- Viewer for users who just need view access

Note : Do not give "Administrator" to GBU users, they would be able to get connected during the import processes

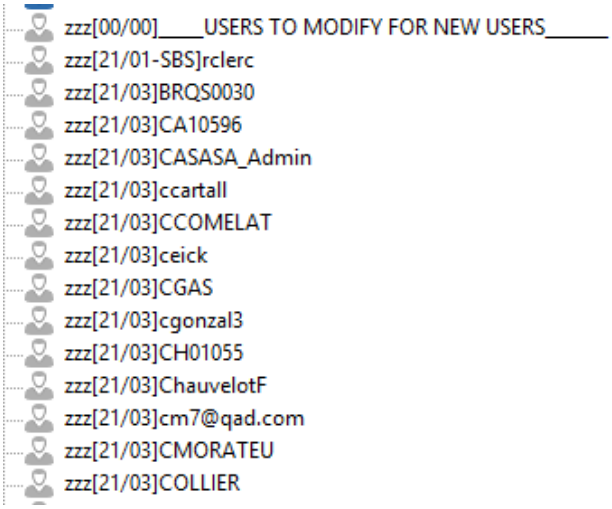


Administrator and Super user are for SBS users for system maintenance

- **User deletion**

When a user is obsolete :

- Rename the user with zzz before the user name. The YY/MM does correspond to the Year/Month when the user can be re-used (=Year+1. Current Month)
- Deactivate it



Note: if the user was working on our SBS team, rename the user with zzz[YY/MM-SBS]ID.

- ### User DynaSys server access

The Server access is only required for Remote access. For Web access, no remote access is required.

If a user needs a server access, send an email to your interface team.

- ### User Group mailing

New users should also be added in the corresponding Google group :

$DynasysUsersDP

$DynasysUsersDP2

$DynasysUsersDP3

If users are Key Users (=Demand planners), they should be also added in the following Google group :

$DynasysDP-KeyUsers

$DynasysDP2-KeyUsers

$DynasysDP3-KeyUsers

Sales Manager/Sales Employee creation

This process is applicable for all GBUs except PEROX and SA&D. For PEROX and SA&D, the Sales Manager is managed at the Account Manager level.

The Sales Employee User scope needs to be set-up following different steps :

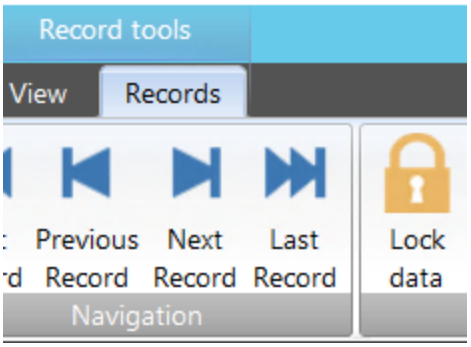
- create the Sales Employee ID (with the email, WindowsID) and corresponding condition
- link the Sales Employee to the Sales Employee ID
- create the Sales Employee User group and update the Master tables security

- Step 1 : Create a new Sales Employee ID

Create a new entry in the Master table Sales Employee ID

Note : This step needs exclusive access to the tool. It has to be done during the release.

To create a new entry, click on "Lock data"



The data to register are :

Code = email

Name = LAST NAME First Name

Short name = User Login

Sales Employee ID records

Code	Name	Short name
maeva.baptiste@solvay.com	BAPTISTE Maeva	*BE024151*
laurent.rocher@solvay.com	ROCHER Laurent	*LROCHER2*

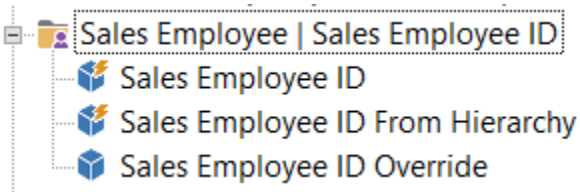
- Step 2 : Create the condition linked to the Sales Employee ID

- Step 3 : Link the Sales Employee to the Sales Employee ID

Sales Employee correspond to the Sales Group code in WP1 or the Account Manager code in PF1.

A Sales Employee ID could be linked to more than one Sales Employee.

You can either update directly in the table during a release or use the datafield : Sales Employee ID Override, which will update the hierarchy during the night.



- Step 4 : Update the security
- Step 5 : Simulate the user to make sure the user sees some DFUs in his portfolio

DynaSys user creation details per GBU

For all users :

Login : Windows ID

External user name : eMail

Aroma

	User Description	Role User group	Scope User group		
			User group to be created (*Do not duplicate an existing one)*	Condition to be created	Security to be updated
Demand Planner	PA / DP / Country code / LAST and First Name	AROMA - GBU AROMA - Role Demand - Scope EU (or AP, NA, LA)	(included in the Role User group)	N/A	N/A
Sales Representative	PA / SREP / Country code / LAST and First Name	AROMA - GBU AROMA - Role Sales Rep	PA - SREP / LAST NAME and First Name	PA - SREP / LAST NAME and First Name Parent Master Table : Sales Employee ID Selection mask : eMail (Sales Employee ID code) Note : Prior to this step, the Sales Employee ID should be created and linked to the corresponding Sales Employee(s) code (Refer to paragraph : Sales Manager /Sales Employee creation for more details)	Material: Shipto@DC table Sales Employee ID Table
Global Key Account Manager (GKAM) Note : Sales Representative who are also GKAM have 2 accounts and can switch from one account to another (Refer to the specific page on "Switch user feature for more details)	PA / GKAM / Country code / LAST and First Name	GKAM - GBU Ship-to Group Name	GKAM / GBU Ship-to Group Name	GKAM / GBU Ship-to Group Name Parent Master Table : GBU Ship-to Group Selection mask : GBU Ship-to Group + ^ at the beginning of the code and $ at the end of the code	Material: Shipto@DC table Ship-to@BU table

4.TECHNOLOGY SOLUTIONS

	Description	Role user group	Scope User group		
			User group to be created ***(Do not duplicate an existing one)***	**Condition to be created**	**Security to be updated**
Sales employee	TS / SREP / Country code / LAST & First Name	TS - Role Sales manager	TS - SREP - Country code / LAST & First Name	TS - SREP - Country Code / LAST & First Name	Sales Employee ID table Sales Employee table Material: Shipto@DC table
Pricing team	TS / Pricing team / Country code / LAST & First Name	TS - Princing Team	N/A	N/A	N/A

DEMAND PLANNER	TS / DP / Country code / LAST and First Name	DP - TS (MS) or DP - TS (PA) or DP - TS (PHOS - HENCHANG) or DP - TS (PHOS - PHOSPHINE) or DP - TS (PHOSPHORUS)	N/A	N/A	N/A

Sales Rep. SREP

Create the user:

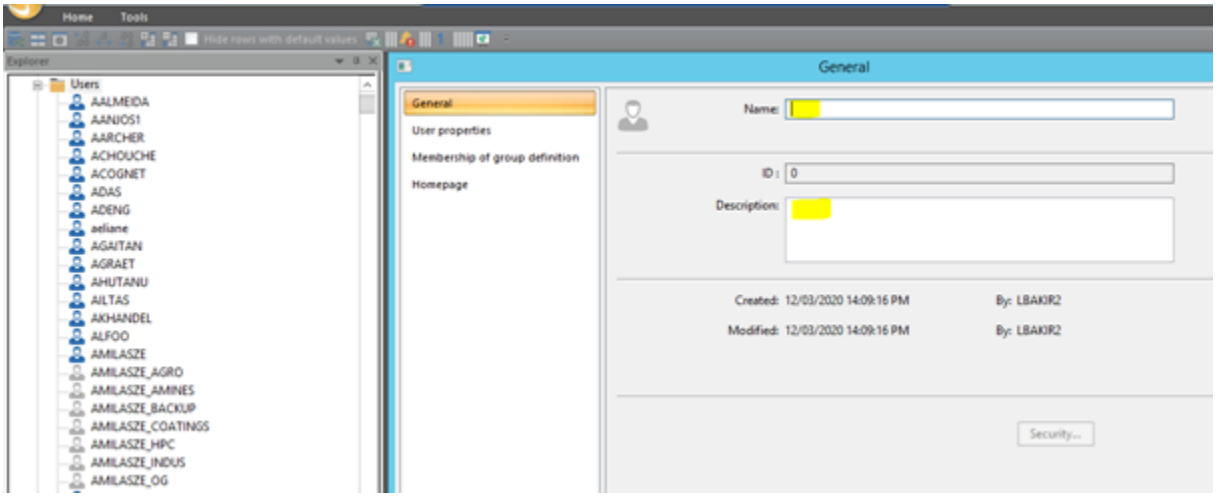
Name: Windows ID

Description : TS / SREP / Country code / LAST & First Name

User Properties:

Check “Collaborator”

Check “Account Enabled”



Create the user Group :

Create the user group (DO NOT DUPLICATE AN EXISTING ONE)

Name : TS – Country Code / LAST & First Name

Assign to this user group the user created

Delete any other existing assignments copied from duplicata

Create condition:

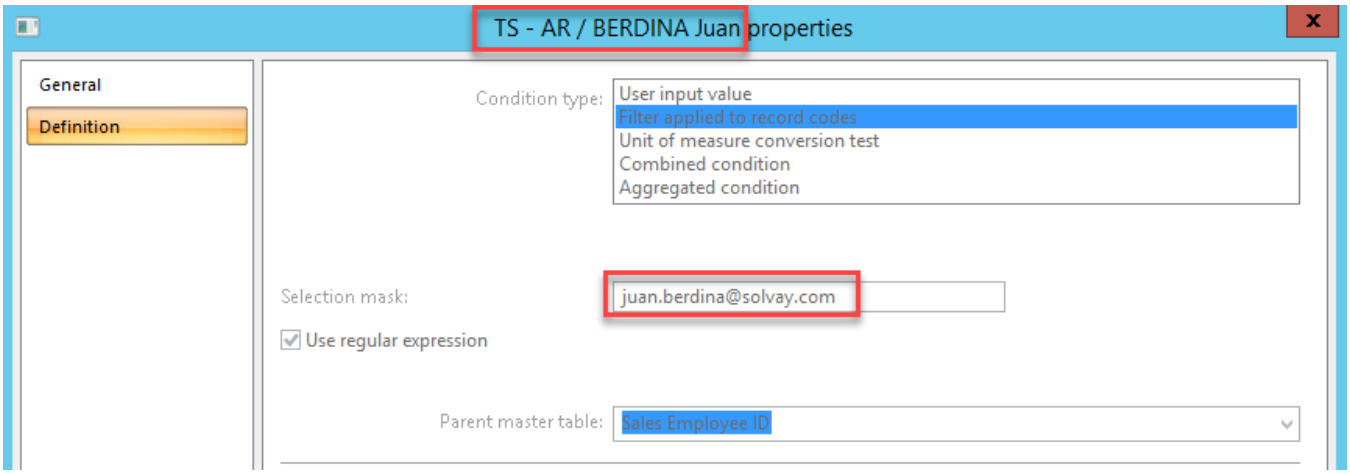
Under table **Sales Employee ID**

Name: TS - Country Code / LAST & First Name

Condition Type: Filter applied to record codes

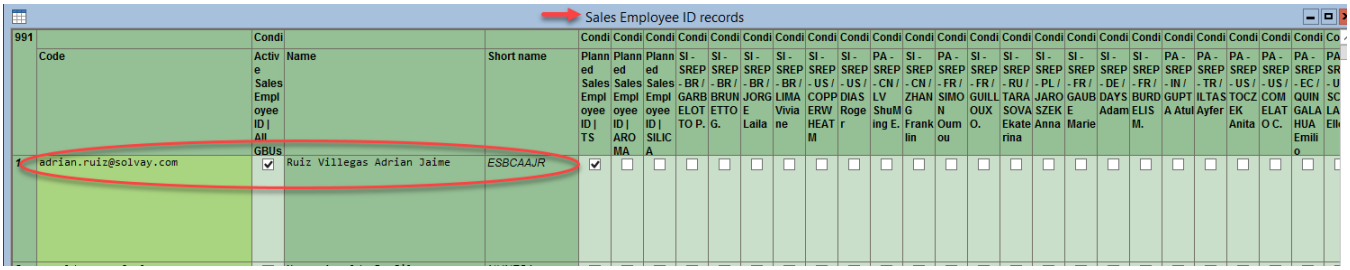
Selection mask : input the user's email address

Parent master table: Sales Employee ID



>>> This step should be done during a release... (Exclusive access needed!)

Update the **Sales Employee ID** table, add the user's email address into the table and tick the related condition you just created in the previous step



Update the security of master tables: " **Sales Employee**" > Right click > Security > Advanced security > Go to user group line (created step before) and put the condition (created before)

Repeat this step for all master tables which are parents of "**Sales Employee**" table (the most important one is : **Material:Shipto@DC** table)

RSD

xxx

PRICING TEAM

Create the user :

Login : Windows ID

Description : TS / Pricing team / Country code / LAST and First Name

Assign the following user groups :

TS - Princing Team

DEMAND PLANNER

Create the user :

Login : Windows ID

Description : TS / DP / Country code / LAST and First Name

Assign the following user groups :

TS - DP- ...

PRODUCT MANAGER

5.NOVECARE

Sales Employee

Create the user:

Login: Windows ID

Login SAP

Description: CS / SREP / Country code / LAST and first name

Assign the user to the following user groups role (for entry at DFU level) :

NOVECARE - SALES REP (KG) **or** NOVECARE - SALES REP (LB)

If it is a MCZ Sales Rep, assign the following user groups role (for entry at MCZ level) :

NOVECARE - SALES REP - MCZ (KG) **or** NOVECARE - SALES REP - MCZ (LB)

To activate the user please follow the steps mentioned in this Google Sheet.

Create the user group scope :

Create a new user group (DO NOT DUPLICATE AN EXISTING ONE)

Name: NOV - SREP - Country Code / LAST and first name

Assign to this user group the user created

Delete any other existing assignments copied from duplicata

Create condition:

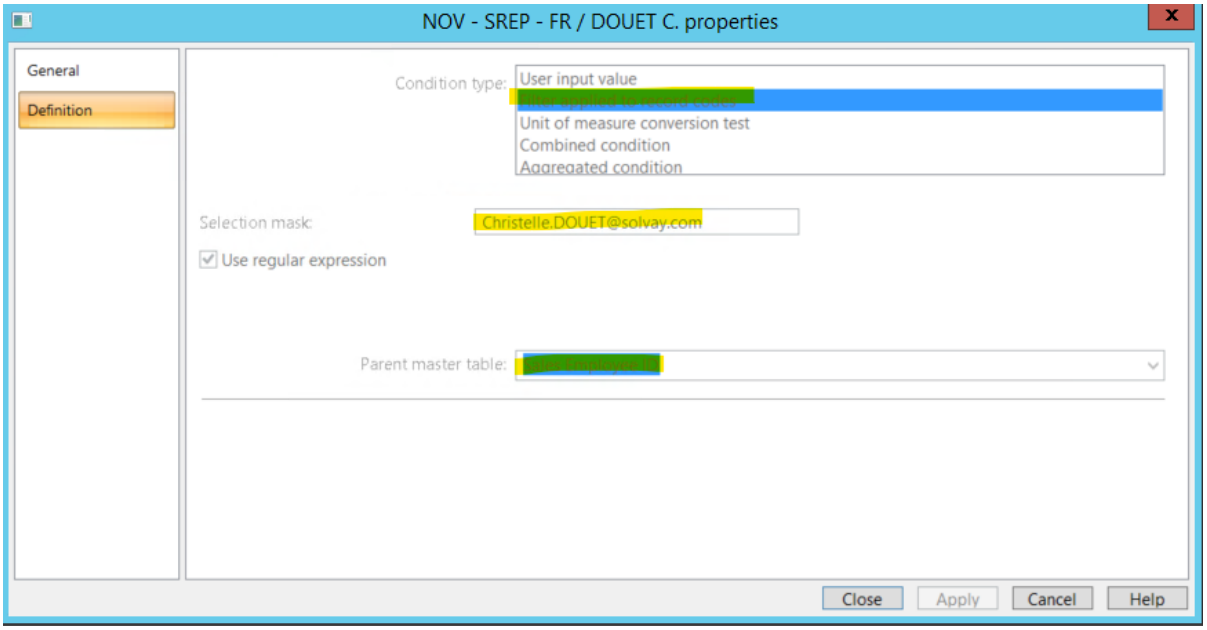
Under table Sales Employee ID

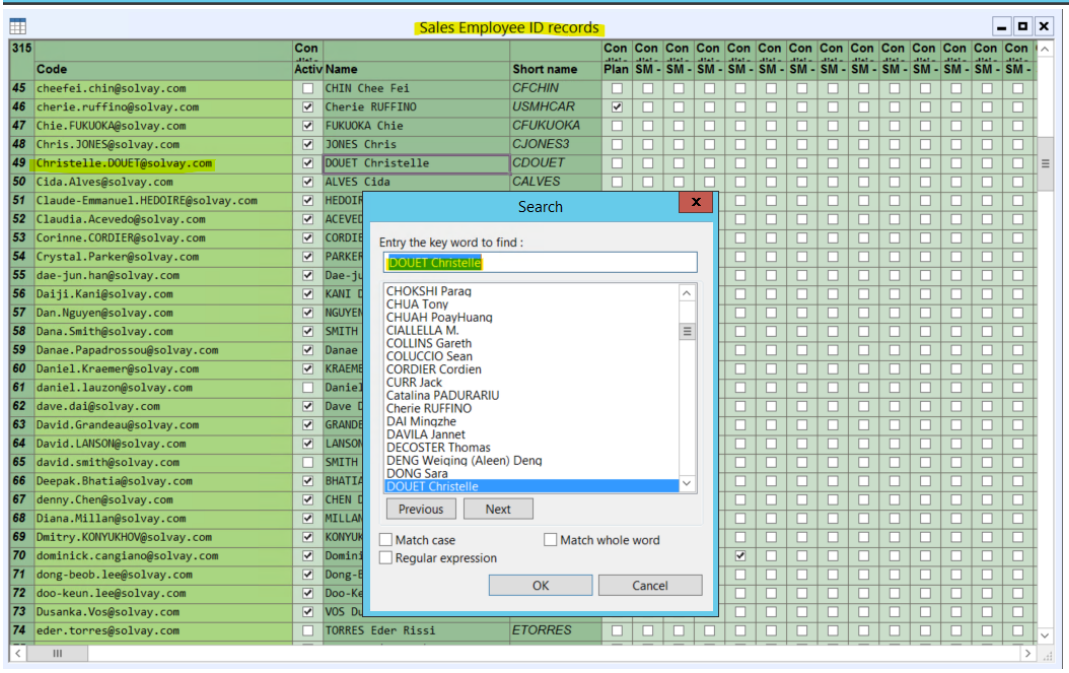
Name: NOV - SREP - Country Code / LAST and first name

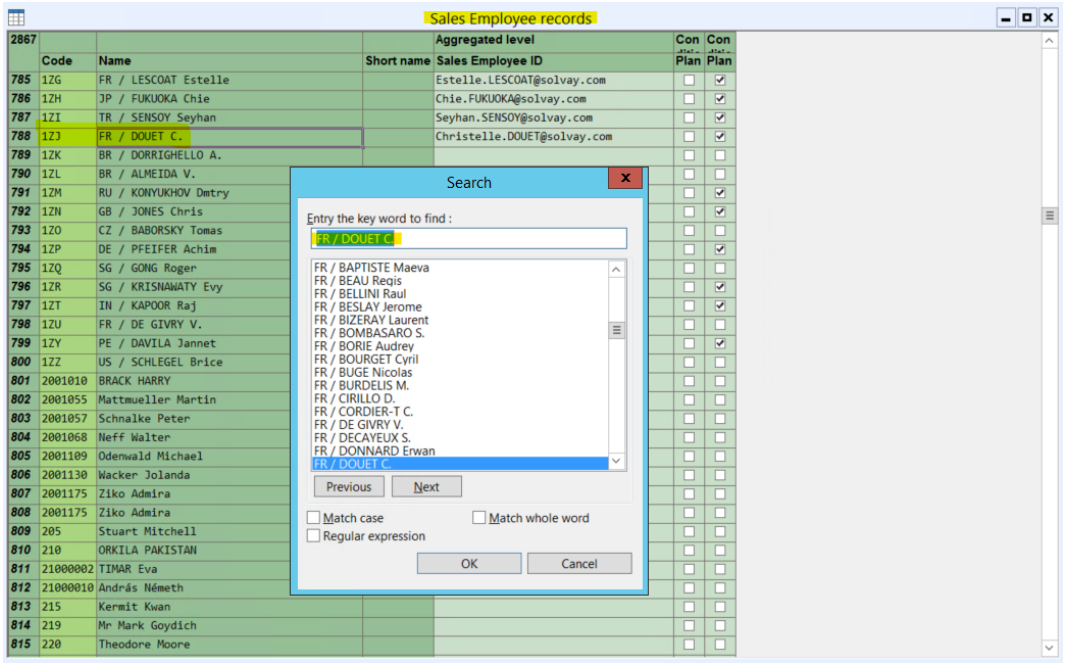
Type: Filter applied to record codes

Selection mask: User email address (Search in Sales Employee table the name of the Sales Employee you want to create, use the email address in the corresponding field)

>>> This step should be done during a release.

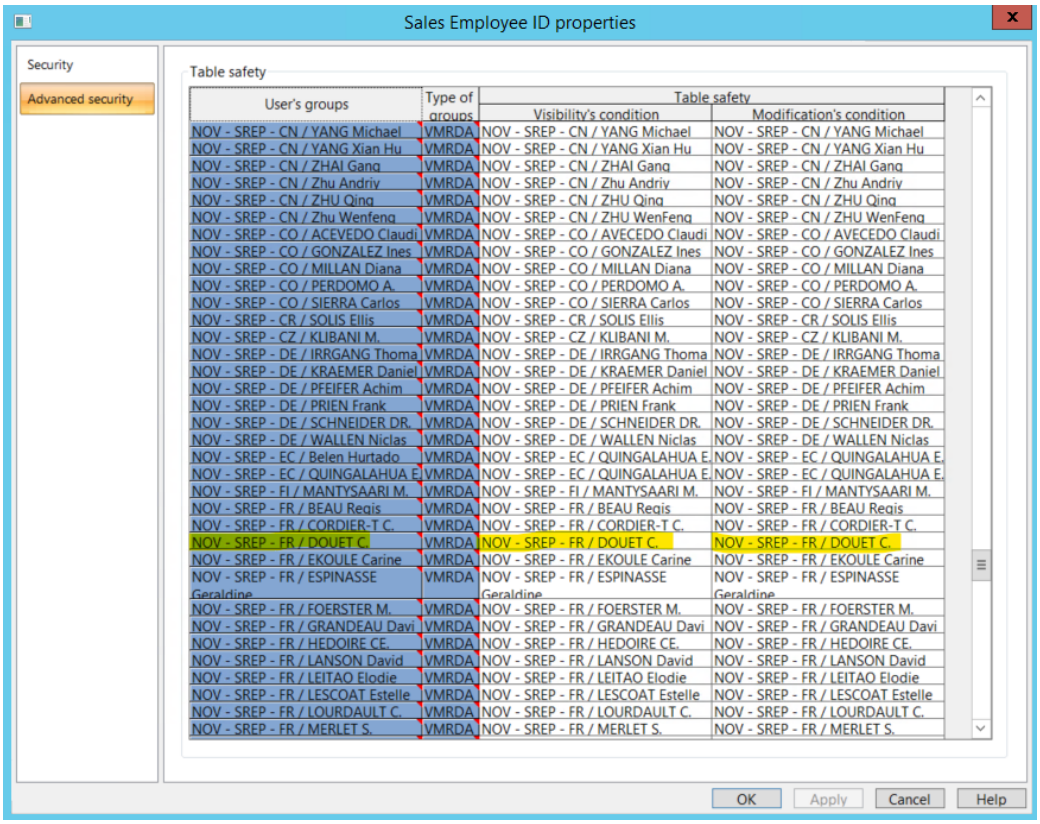

NOV - SREP - FR / DOUET C. properties
General
Definition
Condition type:
User input value
Unit of measure conversion test
Combined condition
Aggregated condition
Selection mask:
Christelle.DOUET@solvay.com
Use regular expression
Parent master table:
Close
Apply
Cancel
Help

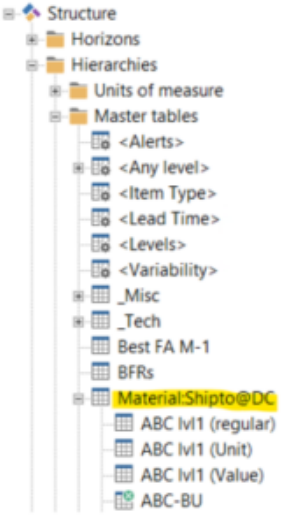

Sales Employee ID records
Code
Name
Short name
cheefei.chin@solvay.com
CHIN Chee Fei
CFCHIN
cherie.ruffino@solvay.com
Cherie RUFFINO
USMHCAR
Chie.FUKUOKA@solvay.com
FUKUOKA Chie
CFUKUOKA
Chris.JONES@solvay.com
JONES Chris
CJONES3
Christelle.DOUET@solvay.com
DOUET Christelle
CDOUET
Cida.Alves@solvay.com
ALVES Cida
CALVES
Search
Entry the key word to find :
DOUET Christelle
CHOKSHI Paraq
CHUA Tony
CHUAH PoayHuanq
CIALLELLA M.
COLLINS Gareth
COLUCCIO Sean
CORDIER Cordien
CURR Jack
Catalina PADURARIU
Cherie RUFFINO
DAI Mingzhe
DAVILA Jannet
DECOSTER Thomas
DENG Weiqing (Aleen) Deng
DONG Sara
DOUET Christelle
Previous
Next
Match case
Match whole word
Regular expression
OK
Cancel

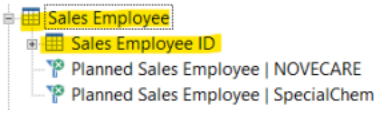


Update the security of master tables: “Sales Employee ID” > Right click > Security > Advanced security > Go to user group line (created step before) and put the condition (created before)

Repeat this step for all master tables which are parents of “Sales Employee ID” table (the most important one is : Material:Shipto@DC table)



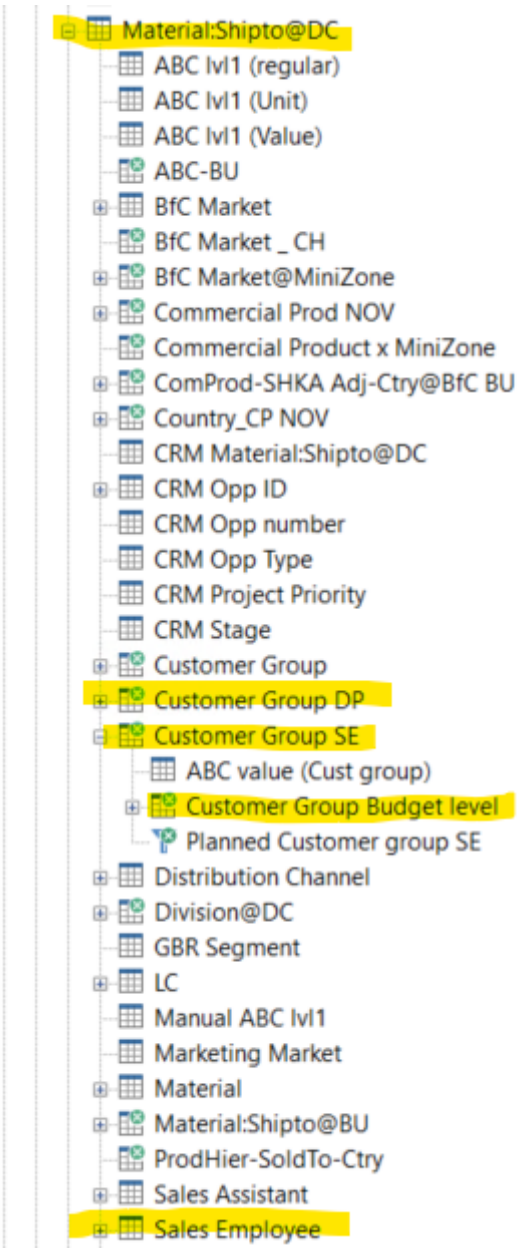




************Important***********

THE SECURITY OF NEW LEVELS IN HIEARARCHY SHOULD BE UPDATED AS WELL

Customer Group Budget Level
Customer Group SE
Sales Employee



Customer Service Rep. CSR (not currently used by Novecare)

Create the user:

Login: Windows ID

Description: CS / CSR / Country code / LAST and first name

Assign the user to the following user groups:

NOVECARE - CSR

Create the user group:

Create a new user group (DO NOT DUPLICATE AN EXISTING ONE)

Name: NOV - CSR / LAST and first name

Assign to this user group the user created

Delete any other existing assignments copied from duplicata

Create condition:

Under table CSR

Name: NOV - CSR / LAST and first name

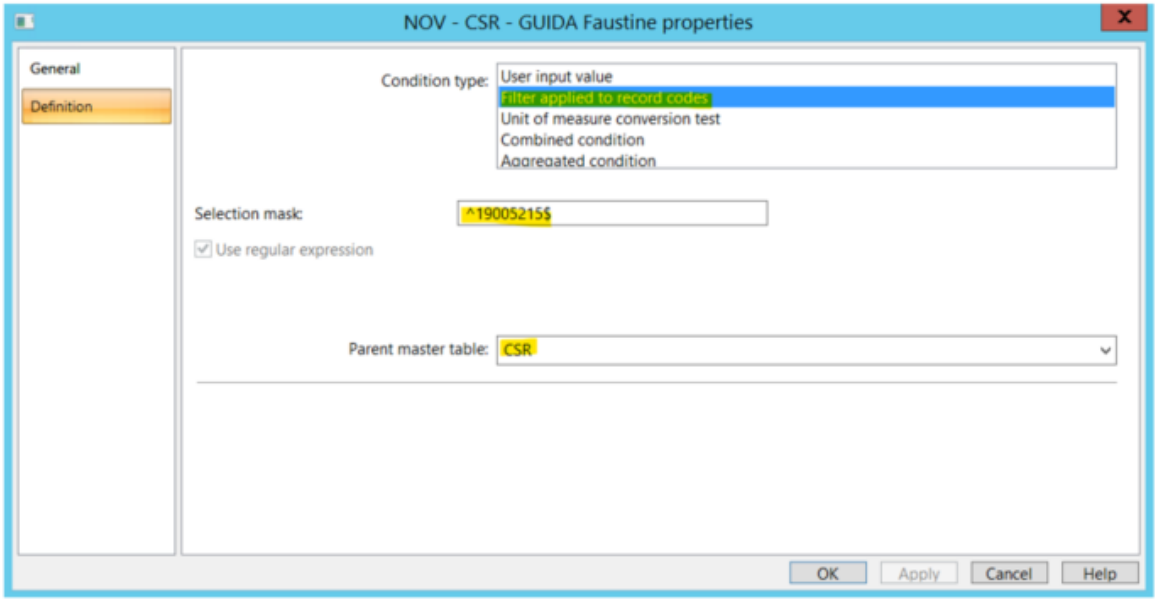
Type: Filter applied to record codes

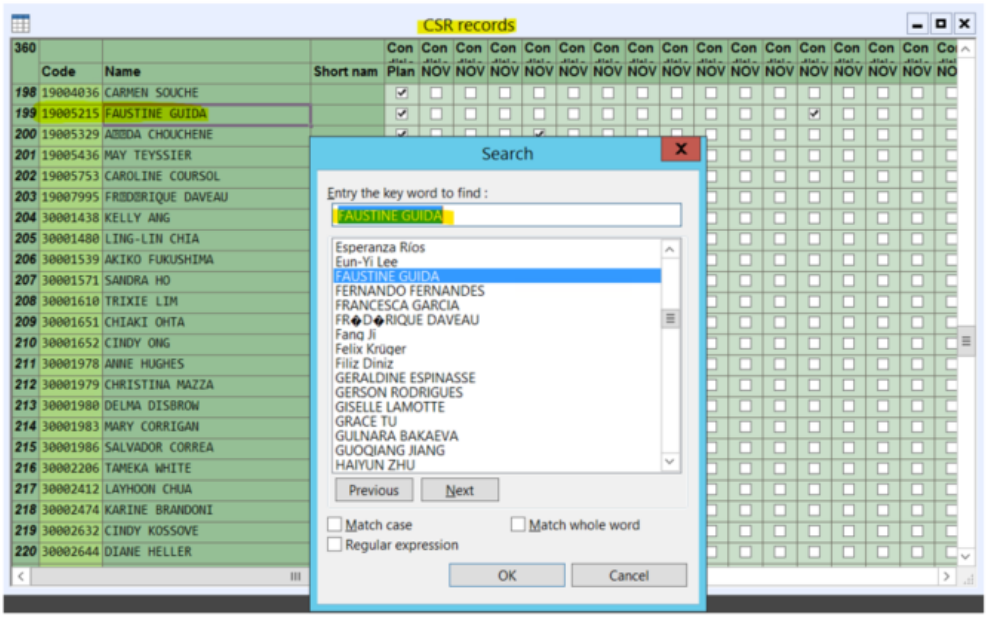
Selection mask: code of the CSR (Search in CSR table the name of the CSR you want to create, use his code in this field)

Add ^ at the beginning of the code

Add $ at the end of the code

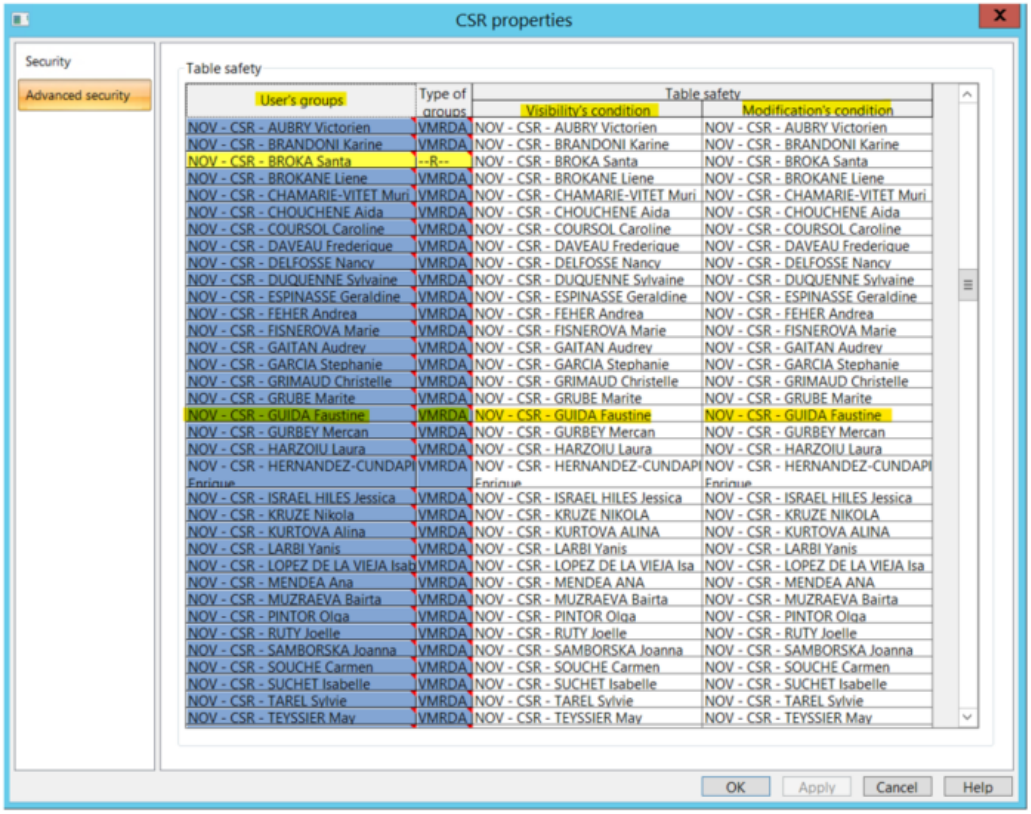
>>> This step should be done during a release.

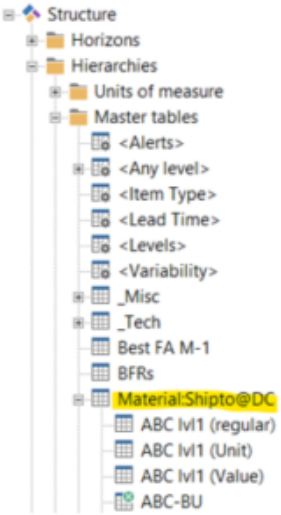


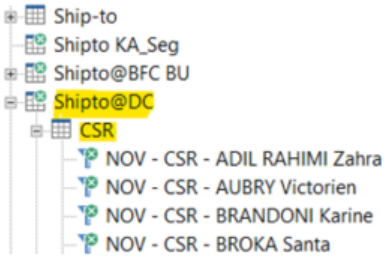


Update the security of master tables: “CSR > Right click > Security > Advanced security > Go to user group line (created step before) and put the condition (created before)

Repeat this step for all master tables which are parents of “CSR table (the most important one is : Material:Shipto@DC table)







S&OP Planner

Create the user:

Login: Windows ID

Description: CS / SOP Manager / Country code / LAST and First name

Assign the user to following user groups:

NOVECARE - S&OP Planner

Create the user Group:

Create a new user group (DO NOT DUPLICATE AN EXISTING ONE)

Name: NOV - S&OP Manager - Country Code / LAST and First name

Assign to this user group the user created

Delete any other existing assignments copied from duplicata

Create condition:

Add ^ at the beginning of the code

Add $ at the end of the code

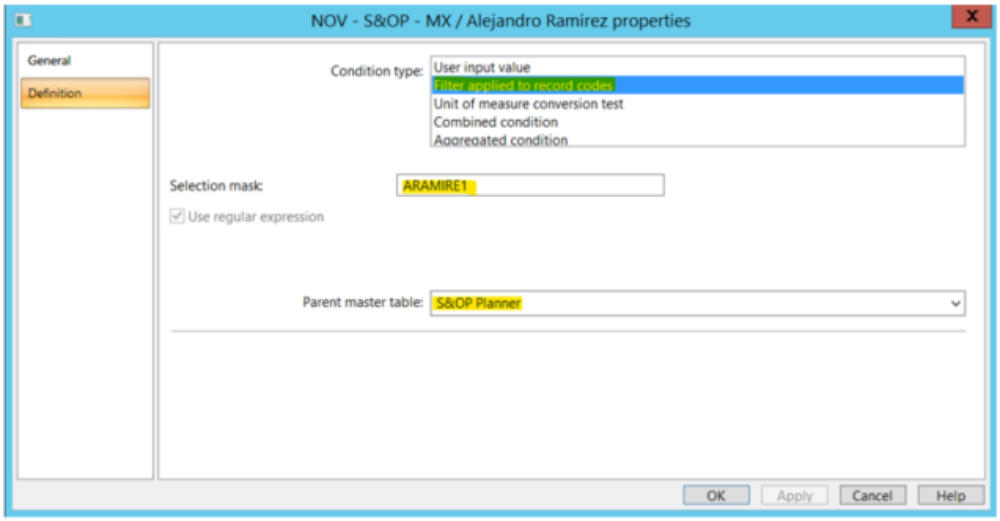
Under table S&OP Planner

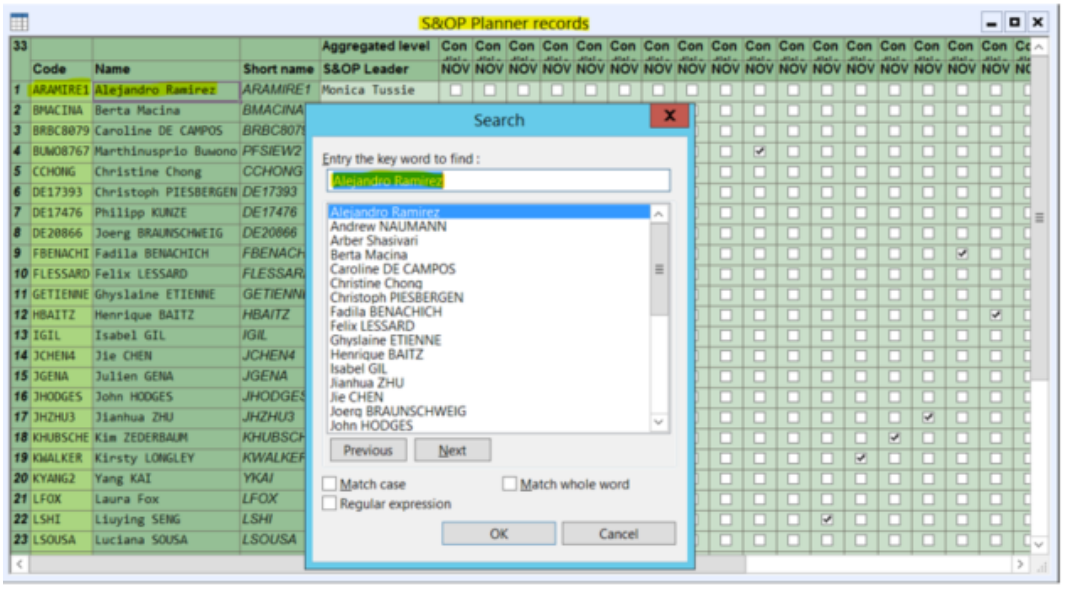
Name: NOV - S&OP - Country Code / LAST and First name

Type: Filter applied to record codes

Selection mask: code of the S&OP Planner (Search in S&OP Planner table the name of the S&OP planner you want to create, use his code in this field)

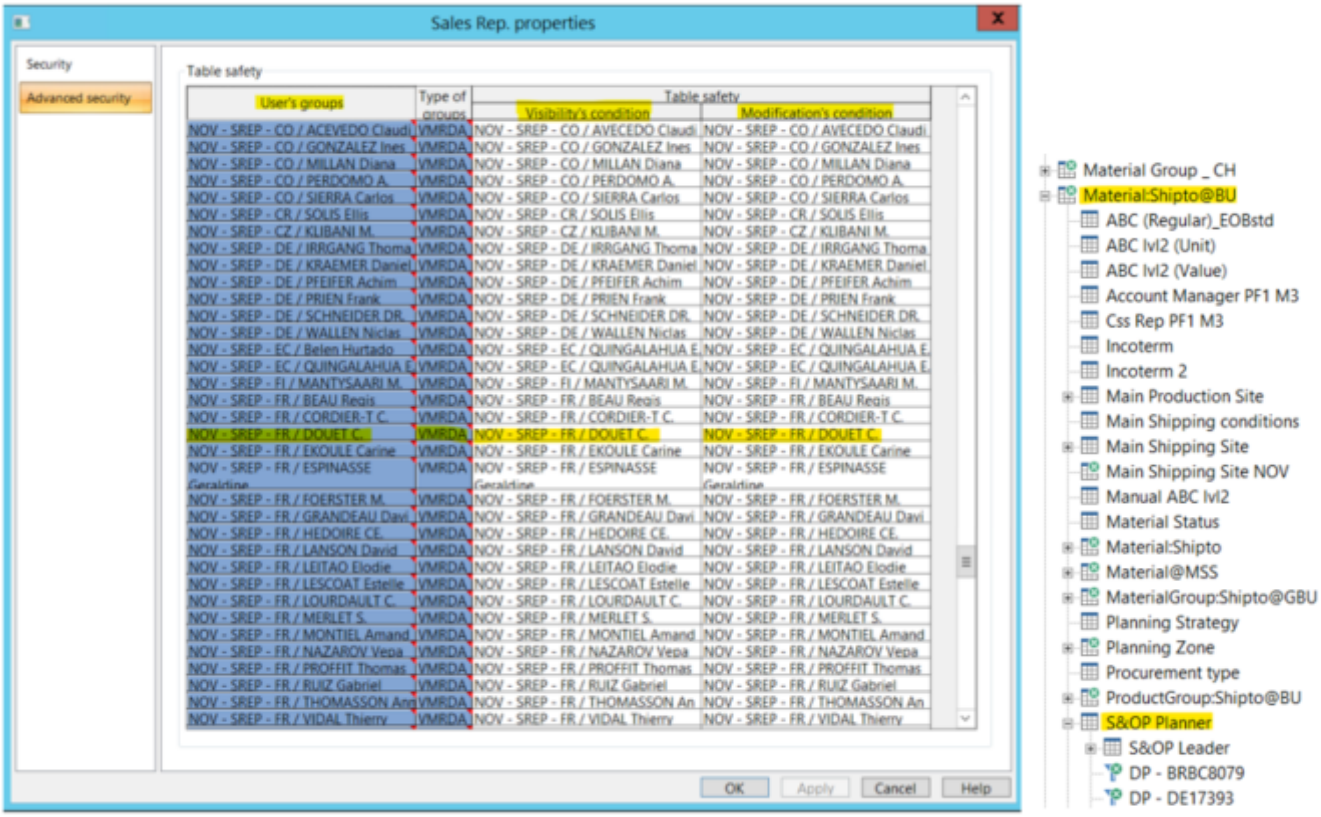
>>> This step should be done during a release.





Update the security of master tables: “S&OP Planner” > Right click > Security > Advanced security > Go to user group line (created step before) and put the condition (created before)

Repeat this step for all master tables which are parents of “S&OP Planner” table (the most important one is : Material:Shipto@DC table)



+ Link between S&OP Leader and S&OP Planner: Update the S&OP Planner table and assign the correct S&OP Leader to the correct S&OP Planner, depending on the zone.

S&OP Planner records

34				Aggregated level	Condi	Condi	Condi	Condi	Condi	Condi	Co
	Code	Name	Short name	S&OP Leader	NOV -	NOV -	NOV -	NOV -	NOV -	NOV -	NO
1	ARAMIRE1	Alejandro Ramirez	*ARAMIRE1*	Monica Tussie	☐	☐	☐	☐	☐	☐	☐
2	BMACINA	Berta Macina	*BMACINA*	Walter CUNHA	☐	☐	☐	☐	☐	☐	☐
3	BRBC8079	Caroline DE CAMPOS	*BRBC8079*		☐	☐	☐	☐	☐	☐	☐
4	BUWO8767	Marthinusprio Buwono	*PFSIEW2*	Christine CHONG	☐	☐	☐	☐	☐	☐	☐
5	CCHONG	Christine Chong	*CCHONG*	Christine CHONG	☐	☐	☐	☐	☐	☐	☐
6	DE17393	Christoph PIESBERGEN	*DE17393*		☐	☐	☐	☐	☐	☐	☐
7	DE17476	Philipp KUNZE	*DE17476*		☐	☐	☐	☐	☐	☐	☐
8	DE20866	Joerg BRAUNSCHWEIG	*DE20866*		☐	☐	☐	☐	☐	☐	☐
9	FBENACHI	Fadila BENACHICH	*FBENACHI*	Julien GENA	☐	☐	☐	☐	☐	☐	☐
10	FLESSARD	Felix LESSARD	*FLESSARD*	Julien GENA	☑	☐	☐	☐	☐	☐	☐
11	GETIENNE	Ghyslaine ETIENNE	*GETIENNE*	Julien GENA	☐	☐	☐	☐	☑	☐	☐
12	GUER1226	Lizeth Guerrero	*GUER1226*		☐	☐	☐	☐	☐	☐	☐
13	HBAITZ	Henrique BAITZ	*HBAITZ*	Walter CUNHA	☐	☐	☐	☐	☐	☐	☐

Swith User Role Feature

Reactivate and modify accounts to allow the user to switch to another market (for demand review).

More information --> **3. Switch User funtionality**

S&OP Leader

Create the user:

Login: Windows ID

Description: CS / SOP Leader / Country code / LAST and First name

Assign the user to following user groups:

NOVECARE - S&OP Planner

Create the user Group:

Create a new user group (DO NOT DUPLICATE AN EXISTING ONE)

Name: NOV - S&OP Leader - Mini Zone / LAST and First name

Assign to this user group the user created

Delete any other existing assignments copied from duplicata

Create condition:

Under table S&OP Leader

Name: NOV - S&OP Leader - Mini Zone - LAST and First name

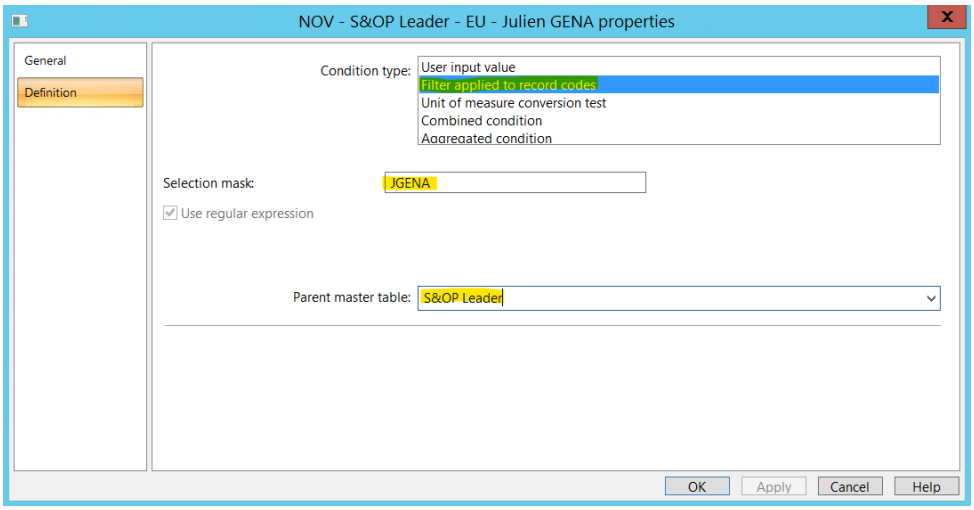
Type: Filter applied to record codes

Selection mask: code of the S&OP Leader (Search in S&OP Leader table the name of the S&OP planner you want to create, use his code in this field)

Add ^ at the beginning of the code

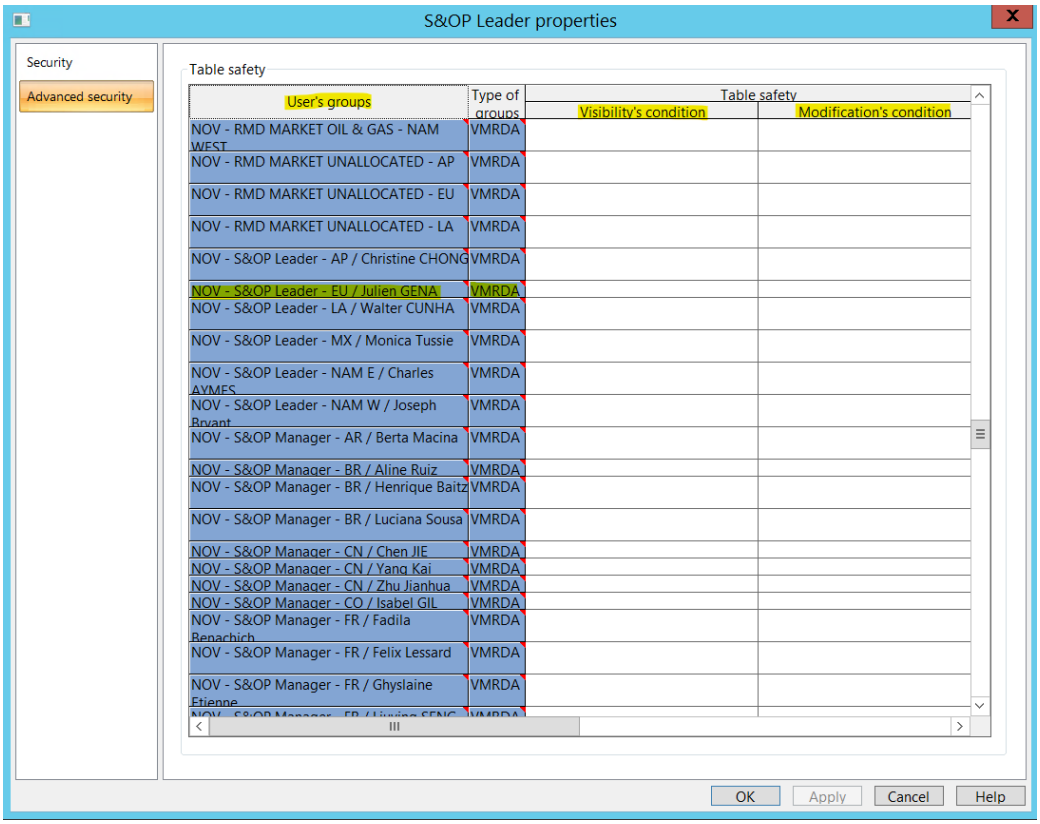
Add $ at the end of the code

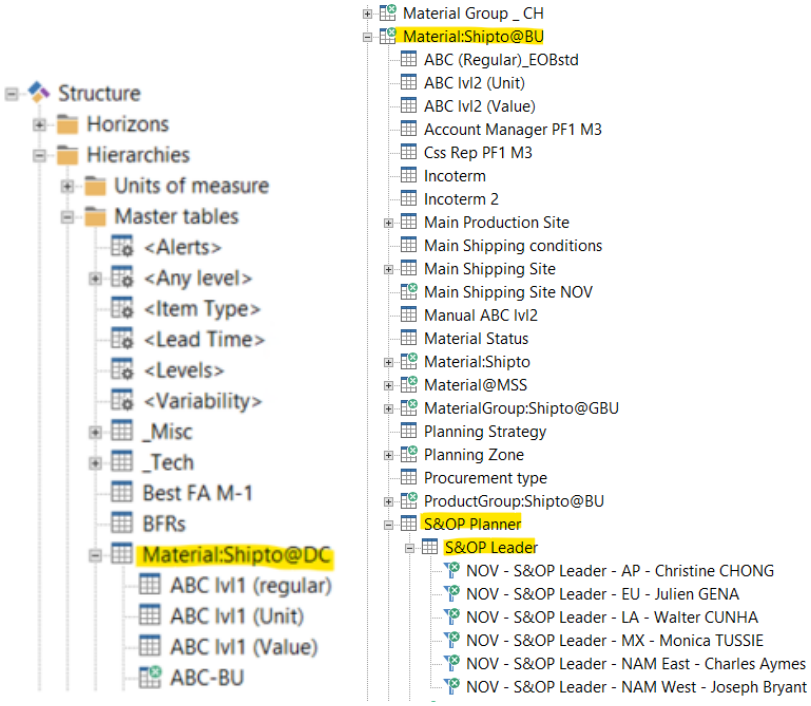
>>> This step should be done during a release.



Update the security of master tables: “S&OP Leader” > Right click > Security > Advanced security > Go to user group line (created step before) and put the condition (created before)

Repeat this step for all master tables which are parents of “S&OP Leader” table (the most important one is : Material:Shipto@DC table)

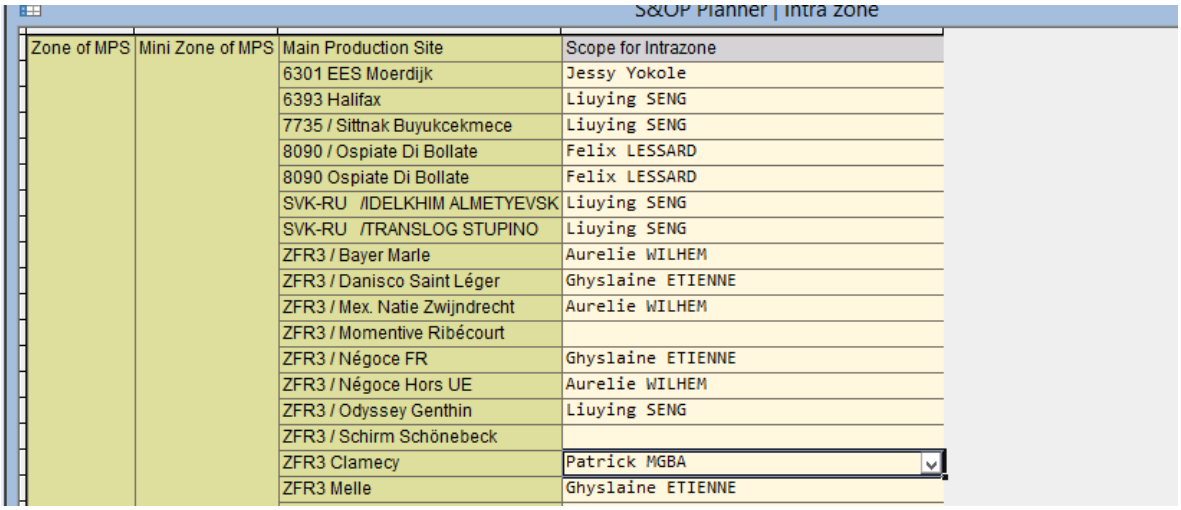




Assign sites to the S&OP leader :

Open Workspace NOVECARE - A0 User right Management

Assign his site to the planner in tabs Intra zone flow and Inter zone flow



Global Key Account Manager (GKAM) / Regional Key Account Manager (RKAM)

A user who is SREP can be also a GKAM

Create the user group:

Create a new user group (DO NOT DUPLICATE AN EXISTING ONE)

Name: GKAM - ShiptoKAName

Assign the user to the user group created

Delete any other existing assignments copied from duplicata

Create condition:

Under table Shipto KA

Name: GKAM - ShiptoKACode

Type: Filter applied to record codes

Selection mask: code of the GBU Ship-to Group (ask the requester for the code)

Add ^ at the beginning of the code

Add $ at the end of the code

>>> This step should be done during a release.

Create combined condition:

Under table Shipto KA Adjusted

Name: SHKA x Zone - ShiptoKAName Zone

exemple: SHKA x Zone - BERCEN NA

Condition type: Combined condition

Left operand: Add condition previously created

Right operand: Zone Shipto - Zone

>>> This step should be done during a release.

Update the security of the 3 master tables Material:Shipto/ Material:Shipto@BU / Material: Shipto@DC:

For each master table:

Right click > Security > Advanced security

Go to user group line (created step before)

Put the condition

>>> This step should be done during a release.

Regional Market Director (RMD) / Business Development Manager (BDM)

A user who is SREP or BDM can also be a RMD

Create the user:

Login: Windows ID

Description: CS / RMD / Country code / LAST and First name

Assign the user to following user groups:

NOVECARE - RMD (KG)

NOVECARE - BDM (KG)

Create the user Group:

Create a new user group (DO NOT DUPLICATE AN EXISTING ONE)

Name: NOV - RMD Market Market Name - Mini Zone

Assign to this user group the user created

Delete any other existing assignments copied from duplicata

Create condition:

Under table XXX

Name: XXX

Type: Filter applied to record codes

Selection mask: code of the XXX (Search in XXX table the name of the XXX you want to create, use his code in this field)

Add ^ at the beginning of the code

Add $ at the end of the code

>>> This step should be done during a release.

Update the security of master tables:

“Material:Shipto@DC” > Right click > Security > Advanced security

Go to user group line (created step before)

Put the condition

>>> This step should be done during a release.

7.Composites

Demand Planner

Create 1 new user :

- Login : Windows ID

Description : CM / DP / Country code / LAST and First name

User Properties : Global Planner, Demand Planner, Distribution Planner, Production Planner, Super user, Account Enabled, External user name: email address

Assign the user to the following user groups : CM - Role Demand Planner

PMI

Create 4 new users :

- Login : Windows ID

Description : CM / Sales Coordinator / Country code / LAST and First name

User Properties : Collaborator, Account Enabled, External user name: email address

Assign the user to the following user groups : CM - Role Sales Coordinator

- Login : Windows ID_BACKUP

Description : CM / Sales Coordinator / Country code / LAST and First name

User Properties : Collaborator, Account Disabled

Assign the user to the following user groups : CM - Role Sales Coordinator

- Login : Windows ID_SC2

Description : CM / Sales Coordinator / Country code / LAST and First name

User Properties : Collaborator, Account Disabled

Assign the user to the following user groups : CM - Role Sales Coordinator

- Login : Windows ID_SC3

Description : CM / Sales Coordinator / Country code / LAST and First name

User Properties : Collaborator, Account Disabled

Assign the user to the following user groups : CM - Role Sales Coordinator

Create 3 new user groups :

- Name : AERO - Sales Coordinator - First and Last Name

Assign the new users Windows ID and Windows ID_BACKUP (created above) to this group

Assign the following Tools access rights : Shortcut bar, Menu bar, Quick access menu, Message Window, and Tool Bar

- Name : AERO - Sales Coordinator - First and Last Name (Other)

Assign the new user Windows ID_SC3 (created above) to this group

Assign the following Tools access rights : Shortcut bar, Menu bar, Quick access menu, Message Window, and Tool Bar

- Name : AERO - Sales Coordinator - First and Last Name (Secondary)

Assign the new user Windows ID_SC2 (created above) to this group

Assign the following Tools access rights : Shortcut bar, Menu bar, Quick access menu, Message Window, and Tool Bar

>> Complete when no users are connected to DP2 <<

Add Condition to the Primary Sales Coordinator Master table :

- Name : SC-First and Last Name
- Description : Sales Coordinator-PMI
- Definition : Condition type = User input value, Parent master table = Primary Sales Coordinator

Add User to Primary Sales Coordinator Master table :

- Open the Primary Sales Coordinator Master table
- Lock the data for editing (Click Records on Menu bar, then click on the Lock data icon)
- Add new record into table : Code (next sequential number), Name (First and Last Name), check off the new condition created above

Add Condition to the Secondary Sales Coordinator Master table :

- Name : SC2-First and Last Name
- Definition : Condition type = Filter applied to record codes, Selection mask = Code from the Primary Master table, Parent master table = Secondary Sales Coordinator

Add User to Secondary Sales Coordinator Master table :

- Open the Secondary Sales Coordinator Master table
- Lock the data for editing (Click Records on Menu bar, then click on the Lock data icon)
- Add new record into table : Code (next sequential number - should match the Primary Sales Coordinator code), Name (First and Last Name)

Add Condition to the Other Sales Coordinator Master table :

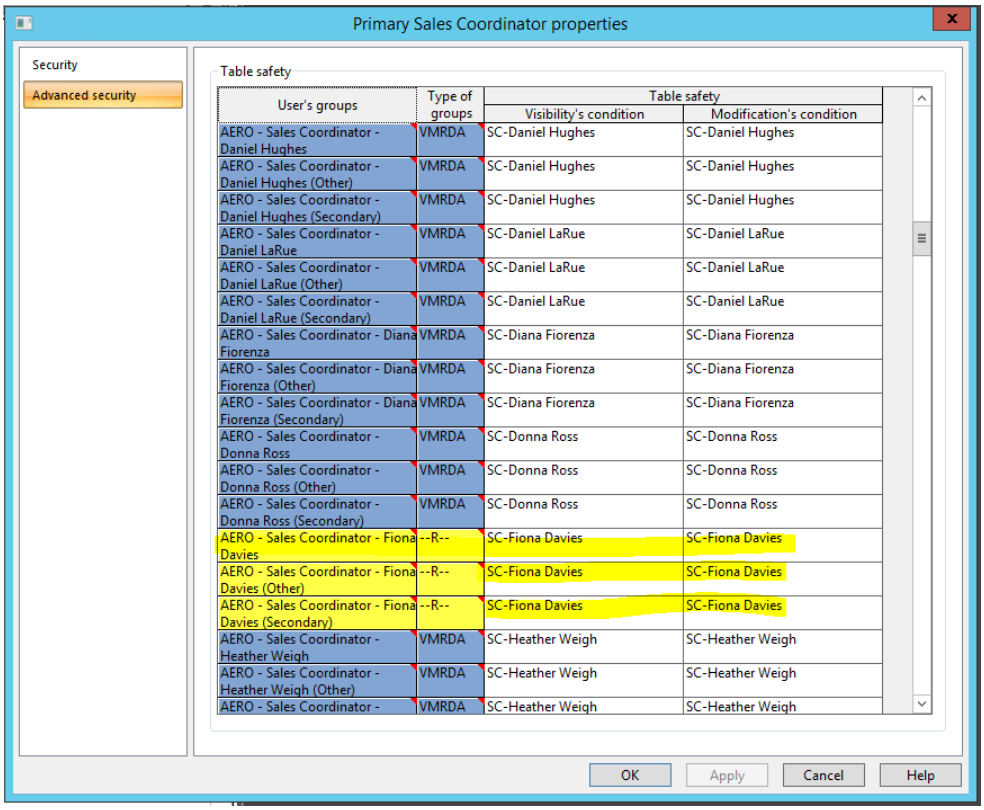
- Name : SC3-First and Last Name
- Definition : Condition type = Filter applied to record codes, Selection mask = Code from the Primary Master table, Parent master table = Other Sales Coordinator

Add User to Other Sales Coordinator Master table :

- Open the Other Sales Coordinator Master table
- Lock the data for editing (Click Records on Menu bar, then click on the Lock data icon)
- Add new record into table : Code (next sequential number - should match the Primary Sales Coordinator code), Name (First and Last Name)

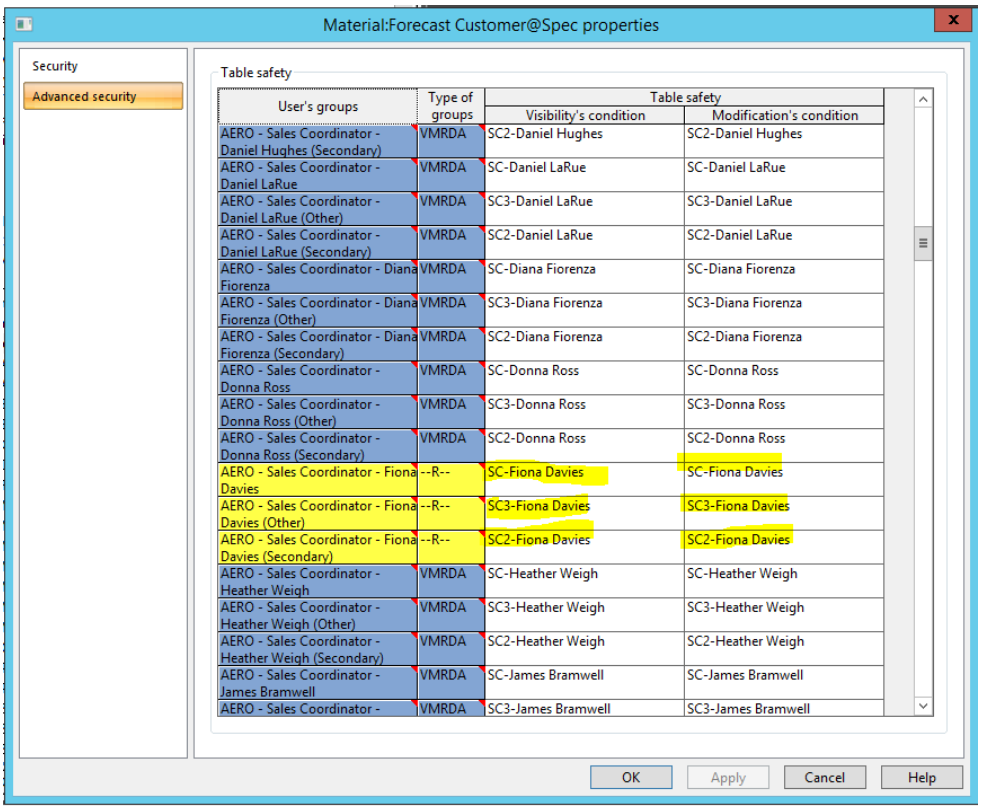
Modify the Advanced Security of the Primary Sales Coordinator Master table :

- Right-click on the Primary Sales Coordinator Master table
- Click on Security
- Click on Advanced secruity in the Primary Sales Coordinator properties box
- Scroll down to the newly created user groups
- Add the newly created condition for the Primary Sales Coordinator Master table to each new user group



Modify the Advanced Security of the Material:Forecast Customer@Spec Master table :

- Right-click on the Material:Forecast Customer@Spec Master table
- Click on Security
- Click on Advanced secruity in the Material:Forecast Customer@Spec properties box
- Scroll down to the newly created user groups
- Add the newly created condition for the Primary Sales Coordinator Master table, Secondary Sales Coordinatory Master table, and Other Sales Coordinatory Master table to each new user group (Other = SC3, Secondary = SC2)



PMI Admin

Create 6 new users :

- Login : Windows ID

Description : CM / Sales Coordinator / Country code / LAST and First name

User Properties : Collaborator, Account Enabled, External user name: email address

Assign the user to the following user groups : CM - Role PMI (Sales Coordinator)

- Login : Windows ID_BACKUP

Description : CM / Sales Coordinator / Country code / LAST and First name

User Properties : Collaborator, Account Disabled

Assign the user to the following user groups : CM - Role PMI (Sales Coordinator)

- Login : Windows ID_GLOBAL

Description : CM / PMI Admin / Country code / LAST and First name

User Properties : Collaborator, Account Disabled

Assign the user to the following user groups : AERO - PMI Admin - Global Scope and CM - Role PMI Admin.

- Login : Windows ID_ADMIN

Description : CM / PMI Admin / Country code / LAST and First name

User Properties : Collaborator, Account Disabled

Assign the user to the following user groups : CM - Role PMI Admin.

- Login : Windows ID_SC2

Description : CM / Sales Coordinator / Country code / LAST and First

Properties : Collaborator, Account Disabled

Assign the user to the following user groups : CM - Role PMI (Sales Coordinator)

- Login : Windows ID_SC3

Description : CM / Sales Coordinator / Country code / LAST and First name

User Properties : Collaborator, Account Disabled

Assign the user to the following user groups : CM - Role PMI (Sales Coordinator)

Create 4 new user groups :

- Name : AERO - Sales Coordinator - First and Last Name

Assign the new users Windows ID and Windows ID_BACKUP (created above) to this group

Assign the following Tools access rights : Shortcut bar, Menu bar, Quick access menu, Message Window, and Tool Bar

- Name : AERO - Sales Coordinator - First and Last Name (Other)

Assign the new user Windows ID_SC3 (created above) to this group

Assign the following Tools access rights : Shortcut bar, Menu bar, Quick access menu, Message Window, and Tool Bar

- Name : AERO - Sales Coordinator - First and Last Name (Secondary)

Assign the new user Windows ID_SC2 (created above) to this group

Assign all Tools access rights

- Name : AERO - PMI Admin - First and Last Name

Assign the new user Windows ID_ADMIN (created above) to this group

Assign the following Tools access rights : Shortcut bar, Menu bar, Quick access menu, Message Window, and Tool Bar

>> Complete when no users are connected to DP2 <<

Add Condition to the PMI Admin Master table :

- Name : PMI Admin - First and Last Name
- Description : Sales Coordinator-PMI
- Definition : Condition type = User input value, Parent master table = PMI Admin

Add Condition to the Primary Sales Coordinator Master table :

- Name : SC-First and Last Name
- Description : Sales Coordinator-PMI
- Definition : Condition type = User input value, Parent master table = Primary Sales Coordinator

Add User to Primary Sales Coordinator Master table :

- Open the Primary Sales Coordinator Master table
- Lock the data for editing (Click Records on Menu bar, then click on the Lock data icon)

- Add new record into table : Code (next sequential number), Name (First and Last Name), PMI Admin (Choose the Admin entered in the PMI Admin table above), check off the new condition created above

Add Condition to the Secondary Sales Coordinator Master table :

- Name : SC2-First and Last Name
- Definition : Condition type = Filter applied to record codes, Selection mask = Code from the Primary Master table, Parent master table = Secondary Sales Coordinator

Add User to Secondary Sales Coordinator Master table :

- Open the Secondary Sales Coordinator Master table
- Lock the data for editing (Click Records on Menu bar, then click on the Lock data icon)
- Add new record into table : Code (next sequential number - should match the Primary Sales Coordinator code), Name (First and Last Name)

Add Condition to the Other Sales Coordinator Master table :

- Name : SC3-First and Last Name
- Definition : Condition type = Filter applied to record codes, Selection mask = Code from the Primary Master table, Parent master table = Other Sales Coordinator

Add User to Other Sales Coordinator Master table :

- Open the Other Sales Coordinator Master table
- Lock the data for editing (Click Records on Menu bar, then click on the Lock data icon)
- Add new record into table : Code (next sequential number - should match the Primary Sales Coordinator code), Name (First and Last Name)

Add Condition to the Material:Forecast Customer@Spec Master table :

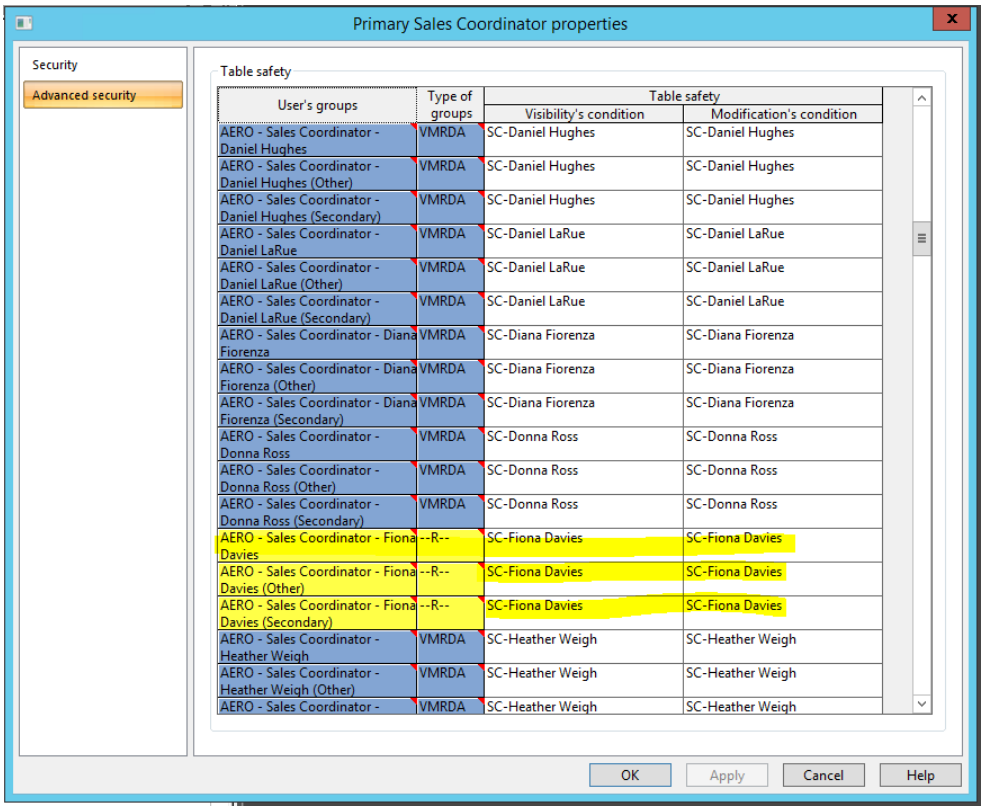
- Name : Admin PMI at DFU - First and Last Name
- Definition : Condition type = Combined condition, Left operand = Active L2, Logic operator = AND, Right operand = PMI Admin condition (from the PMI Admin Master table) for new user, Parent master table = Material:Forecast Customer@Spec

Add Condition to the Forecast Customer Master table :

- Name : PMI Admin FC - First and Last Name
- Definition : Condition type = Aggregated condition, Detailed condition = Admin PMI at DFU condition (from the Material:Forecast Customer@Spec Master table) for new user, Logic operator = OR, Parent master table = Forecast Customer

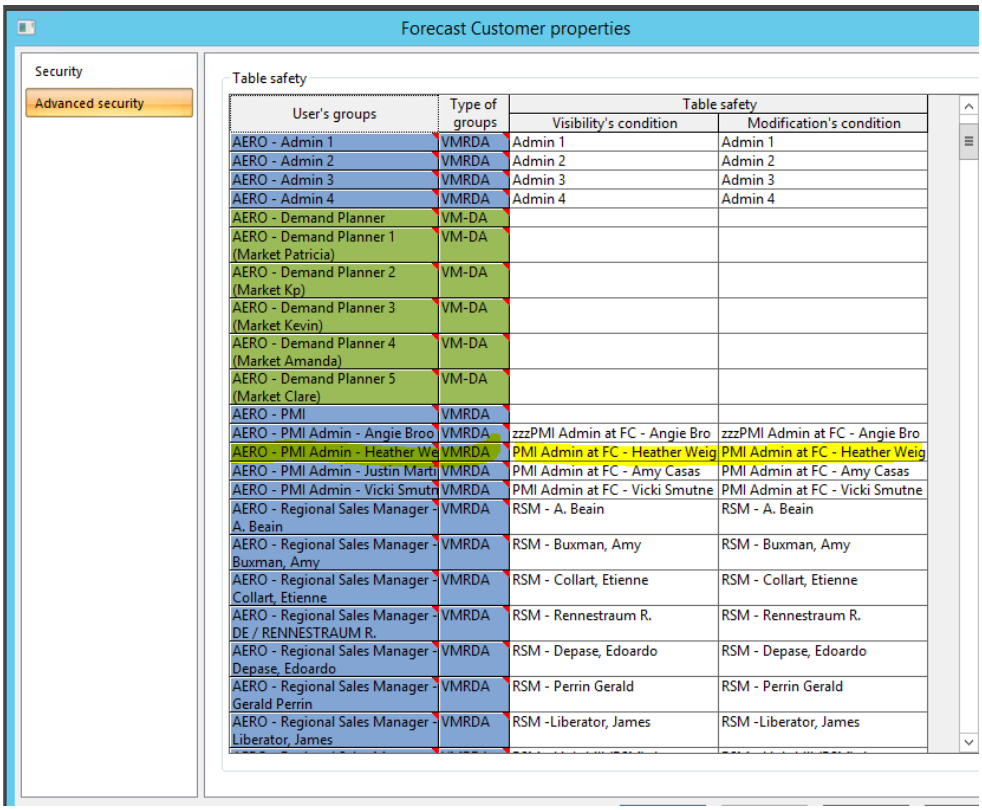
Modify the Advanced Security of the Primary Sales Coordinator Master table :

- Right-click on the Primary Sales Coordinator Master table
- Click on Security
- Click on Advanced secruity in the Primary Sales Coordinator properties box
- Scroll down to the newly created user groups
- Add the newly created condition for the Primary Sales Coordinator Master table to each new user group



Modify the Advanced Security of the Forecast Customer Master table :

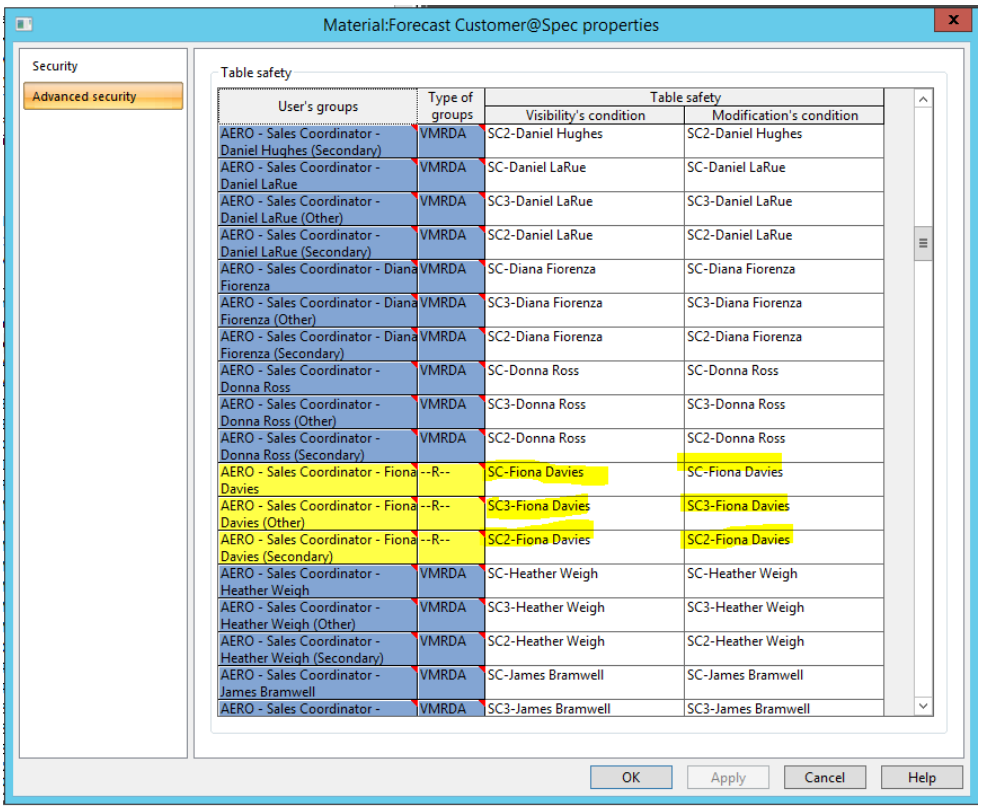
- Right-click on the Forecast Customer Master table
- Click on Security
- Click on Advanced secruity in the Forecast Customer properties box
- Scroll down to the newly created PMI Admin user group
- Add the newly created condition for the Forecast Customer Master table



User's groups	Type of groups	Table safety	
		Visibility's condition	Modification's condition
AERO - Admin 1	VMRDA	Admin 1	Admin 1
AERO - Admin 2	VMRDA	Admin 2	Admin 2
AERO - Admin 3	VMRDA	Admin 3	Admin 3
AERO - Admin 4	VMRDA	Admin 4	Admin 4
AERO - Demand Planner	VM-DA		
AERO - Demand Planner 1 (Market Patricia)	VM-DA		
AERO - Demand Planner 2 (Market Kp)	VM-DA		
AERO - Demand Planner 3 (Market Kevin)	VM-DA		
AERO - Demand Planner 4 (Market Amanda)	VM-DA		
AERO - Demand Planner 5 (Market Clare)	VM-DA		
AERO - PMI	VMRDA		
AERO - PMI Admin - Angie Broo	VMRDA	zzzPMI Admin at FC - Angie Bro	zzzPMI Admin at FC - Angie Bro
AERO - PMI Admin - Heather We	VMRDA	PMI Admin at FC - Heather Weig	PMI Admin at FC - Heather Weig
AERO - PMI Admin - Justin Marti	VMRDA	PMI Admin at FC - Amy Casas	PMI Admin at FC - Amy Casas
AERO - PMI Admin - Vicki Smutn	VMRDA	PMI Admin at FC - Vicki Smutne	PMI Admin at FC - Vicki Smutne
AERO - Regional Sales Manager - A. Beain	VMRDA	RSM - A. Beain	RSM - A. Beain
AERO - Regional Sales Manager - Buxman, Amy	VMRDA	RSM - Buxman, Amy	RSM - Buxman, Amy
AERO - Regional Sales Manager - Collart, Etienne	VMRDA	RSM - Collart, Etienne	RSM - Collart, Etienne
AERO - Regional Sales Manager - DE / RENNESTRAUM R.	VMRDA	RSM - Rennestraum R.	RSM - Rennestraum R.
AERO - Regional Sales Manager - Depase, Edoardo	VMRDA	RSM - Depase, Edoardo	RSM - Depase, Edoardo
AERO - Regional Sales Manager - Gerald Perrin	VMRDA	RSM - Perrin Gerald	RSM - Perrin Gerald
AERO - Regional Sales Manager - Liberator, James	VMRDA	RSM -Liberator, James	RSM -Liberator, James

Modify the Advanced Security of the Material:Forecast Customer@Spec Master table :

- Right-click on the Material:Forecast Customer@Spec Master table
- Click on Security
- Click on Advanced secruity in the Material:Forecast Customer@Spec properties box
- Scroll down to the newly created user groups
- Add the newly created condition for the Primary Sales Coordinator Master table, Secondary Sales Coordinatory Master table, and Other Sales Coordinatory Master table to each new user group (Other = SC3, Secondary = SC2)
- Add the newly created condition for the Forecast Customer Master table



Regional Sales Manager

Create new user :

- Login : Windows ID

Description : CM / Regional Sales Manager / Country code / LAST and First name

User Properties : Viewer, Enable account, External user name: email address

Assign the user to the following user groups : CM - Role Regional Sales Manager

Create 1 new user group :

- Name : AERO - Regional Sales Manager - REGION / LAST NAME First Name (For example: AERO - Regional Sales Manager - GB / SMITH Paul)

Assign the new user Windows ID to this group

Assign the following Tools access rights : All options with the exception of the Shortcut bar

>> Complete when no users are connected to DP2 <<

Add Condition to the Regional Sales Manager Master table :

- RSM - REGION / LAST NAME First Name (For example: RSM - GB / SMITH Paul)
- Definition : Condition type = Filter applied to record codes, selection mask = sales group code Parent master table = Regional Sales Manager

Add User to Regional Sales Manager Master table :

- Open the Regional Sales Manager Master table
- Lock the data for editing (Click Records on Menu bar, then click on the Lock data icon)
- Add new record into table : Code (Sales Group Code from SAP - see first step in process), Name (REGION / LAST NAME First Name - For example: GB / SMITH Paul).

Modify the Advanced Security of the Regional Sales Manager Master table :

- Right-click on the Regional Sales Manager Master table
- Click on Security
- Click on Advanced security in the Regional Sales Manager properties box
- Scroll down to the newly created user groups
- Add the newly created condition for the Regional Sales Manager Master table to the new user group

Modify the Advanced Security of the Forecast Account Manager Master table :

- Right-click on the Forecast Account Manager Master table
- Click on Security
- Click on Advanced security in the Forecast Account Manager properties box
- Scroll down to the newly created user groups
- Add the newly created condition for the Forecast Account Manager Master table to the new user group

Modify the Advanced Security of the Forecast Customer Master table :

- Right-click on the Forecast Customer Master table
- Click on Security
- Click on Advanced security in the Forecast Customer properties box
- Scroll down to the newly created user groups
- Add the newly created condition for the Forecast Account Manager Master table to the new user group

Modify the Advanced Security of the Ship-to Master table :

- Right-click on the Ship-to Master table
- Click on Security
- Click on Advanced security in the Ship-to properties box
- Scroll down to the newly created user groups
- Add the newly created condition for the Forecast Account Manager Master table to the new user group

Modify the Advanced Security of the Material:Forecast Customer@Spec Master table :

- Right-click on the Material:Forecast Customer@Spec Master table
- Click on Security
- Click on Advanced security in the Material:Forecast Customer@Spec properties box
- Scroll down to the newly created user group
- Add the newly created condition for the Forecast Account Manager Master table to the new user group

Modify the Advanced Security of the Material:Shipto:Spec@DC Master table :

- Right-click on the Material:Shipto:Spec@DC Master table
- Click on Security
- Click on Advanced security in the Material:Shipto:Spec@DC properties box
- Scroll down to the newly created user group
- Add the newly created condition for the Forecast Account Manager Master table to the new user group

Account Manager

Sales Group (Need a better process for this step!!):

- *We need to have a sales group set up in SAP before the account manager can be setup. Amanda Pullen may know what this is or what code we should use. Look in the BW file and in SAP for the proper code.*

Regional Sales Manager:

- Usually supplied in the ticket, but if not we need to know who the account manager will be reporting to.

Create new user :

- Login : Windows ID

Description : CM / Sales Team / Country code / LAST and First name

User Properties : Collaborator, Enable account, External user name: email address

Assign the user to the following user groups : CM - Role Forecast Account Manager

Create 1 new user group :

- Name : AERO - Sales Team - REGION / LAST NAME First Name (For example: AERO - Sales Team - GB / DAVIS Matt)

Assign the new user Windows ID to this group

Assign the following Tools access rights : Menu bar, Quick access menu, Message Window, and Tool Bar

>> Complete when no users are connected to DP2 <<

Add Condition to the Forecast Account Manager Master table :

- Name : REGION / LAST NAME First Name (For example: GB / DAVIS Matt)
- Definition : Condition type = User input value, Parent master table = Forecast Account Manager

Add User to Forecast Account Manager Master table :

- Open the Forecast Account Manager Master table
- Lock the data for editing (Click Records on Menu bar, then click on the Lock data icon)
- Add new record into table : Code (Sales Group Code from SAP - see first step in process), Name (REGION / LAST NAME First Name - For example: GB / DAVIS Matt), set the Regional Sales Manager, check off the new condition created above

Modify the Advanced Security of the Forecast Account Manager Master table :

- Right-click on the Forecast Account Manager Master table
- Click on Security
- Click on Advanced security in the Forecast Account Manager properties box
- Scroll down to the newly created user groups
- Add the newly created condition for the Forecast Account Manager Master table to the new user group

Modify the Advanced Security of the Forecast Customer Master table :

- Right-click on the Forecast Customer Master table
- Click on Security
- Click on Advanced security in the Forecast Customer properties box
- Scroll down to the newly created user groups
- Add the newly created condition for the Forecast Account Manager Master table to the new user group

Modify the Advanced Security of the Ship-to Master table :

- Right-click on the Ship-to Master table
- Click on Security
- Click on Advanced security in the Ship-to properties box
- Scroll down to the newly created user groups
- Add the newly created condition for the Forecast Account Manager Master table to the new user group

Modify the Advanced Security of the Material:Forecast Customer@Spec Master table :

- Right-click on the Material:Forecast Customer@Spec Master table
- Click on Security
- Click on Advanced security in the Material:Forecast Customer@Spec properties box
- Scroll down to the newly created user group
- Add the newly created condition for the Forecast Account Manager Master table to the new user group

Modify the Advanced Security of the Material:Shipto:Spec@DC Master table :

- Right-click on the Material:Shipto:Spec@DC Master table
- Click on Security
- Click on Advanced security in the Material:Shipto:Spec@DC properties box

- Scroll down to the newly created user group
- Add the newly created condition for the Forecast Account Manager Master table to the new user group

8. Oil&Gas

Sales Employee

Create the user:

Login: Windows ID

Login SAP

Description: OG / SREP / Country Code / LAST and first name

Assign the user to the following user groups:

OG - Sales rep (KG)

Create the user group:

Create a new user group (DO NOT DUPLICATE AN EXISTING ONE)

Name: OG - SREP - Country Code / LAST and first name

Assign to this user group the user created

Delete any other existing assignments copied from duplicata

Create condition:

Under table Sales Employee ID

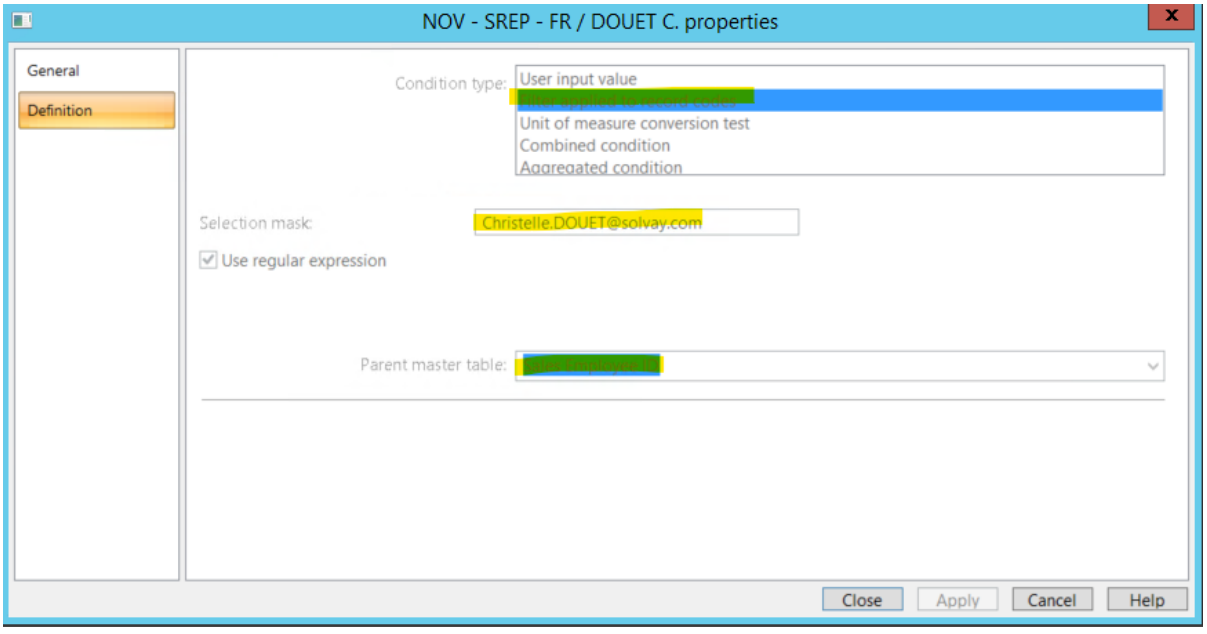
Name: OG - SREP - Country Code / LAST and first name

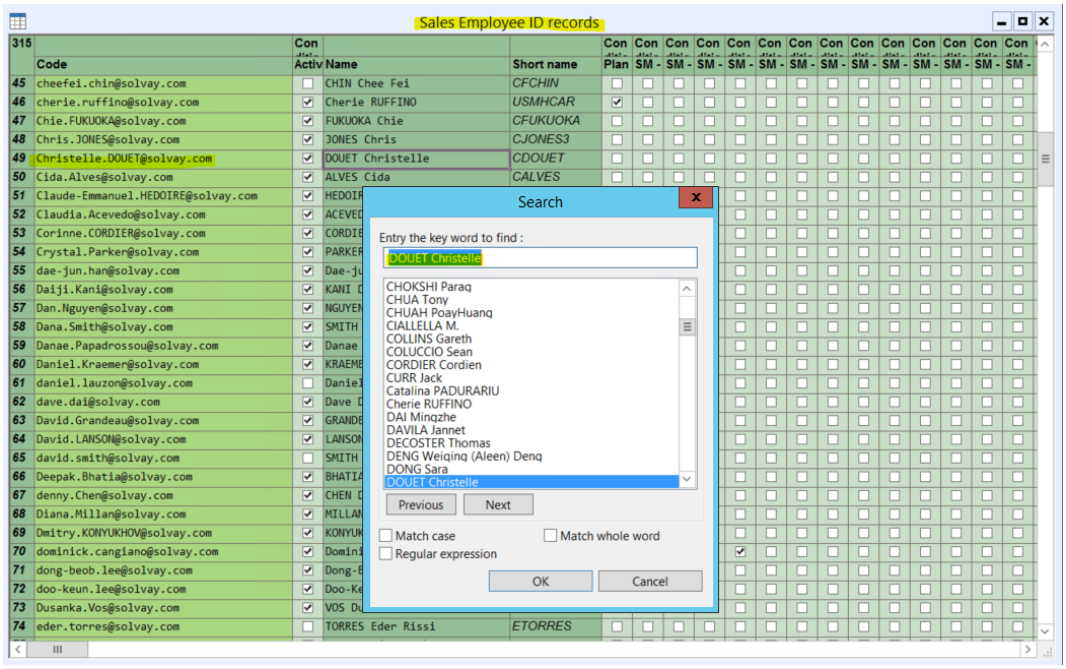
Type: Filter applied to record codes

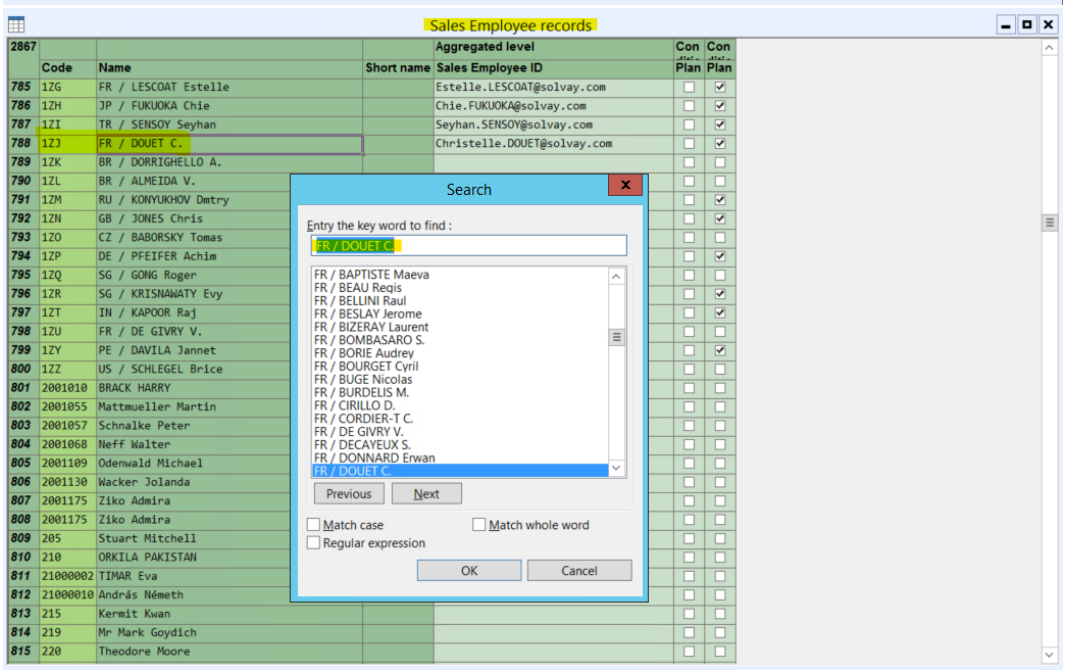
Selection mask: User email address (Search in Sales Employee table the name of the Sales Employee you want to create, use the email address in the corresponding field)

>>> This step should be done during a release.

Note: email should be in lower case.

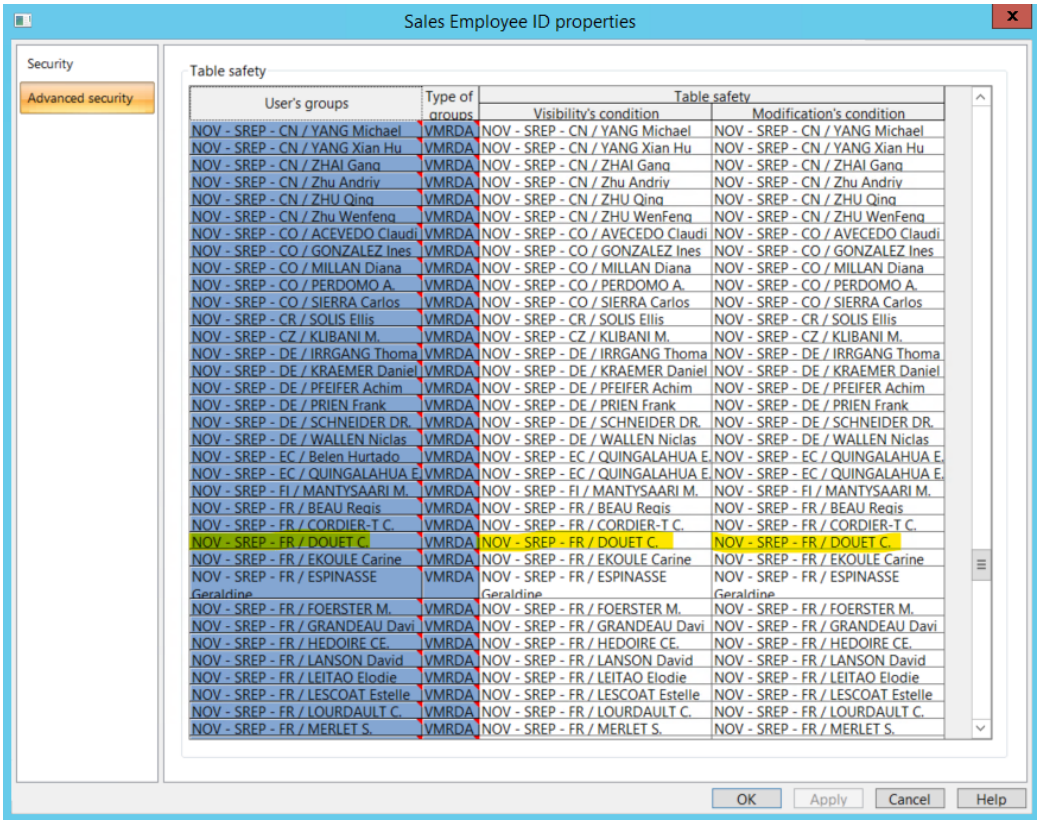






Update the security of master tables: “Sales Employee ID” > Right click > Security > Advanced security > Go to user group line (created step before) and put the condition (created before)

Repeat this step for Material:Shipto@DC table



S&OP Planner

Create the user:

Login: Windows ID

Description: OG / SOP Manager / Country Code / Country Code / First and last name

Assign the user to following user groups:

OG - S&OP Planner

Create the user Group:

Create a new user group (DO NOT DUPLICATE AN EXISTING ONE)

Name: OG - S&OP Manager - Country Code / First and last name

Assign to this user group the user created

Delete any other existing assignments copied from duplicata

Create condition:

Add ^ at the beginning of the code

Add $ at the end of the code

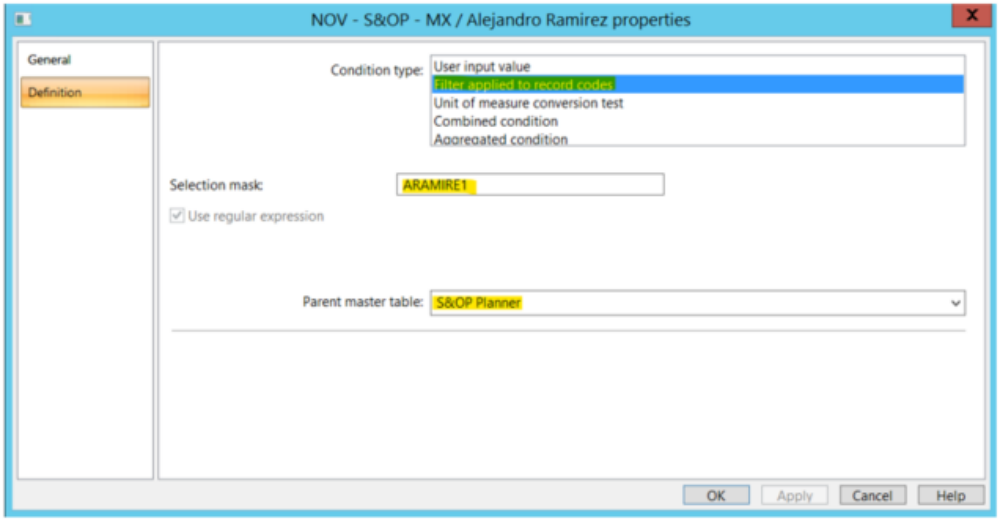
Under table S&OP Planner

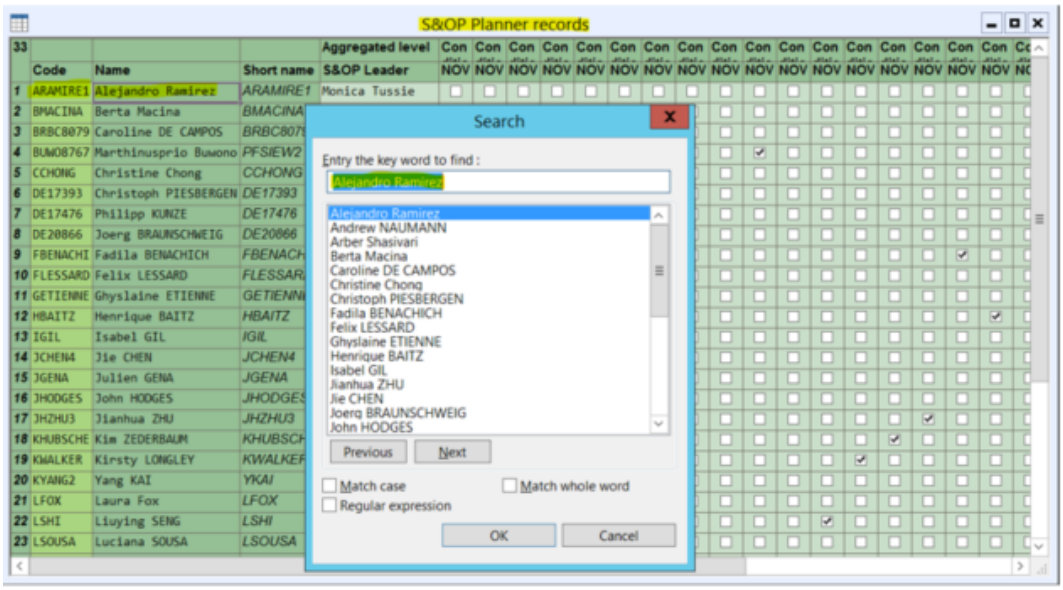
Name: OG - S&OP - Country Code / First and last name

Type: Filter applied to record codes

Selection mask: code of the S&OP Planner (Search in S&OP Planner table the name of the S&OP planner you want to create, use his code in this field)

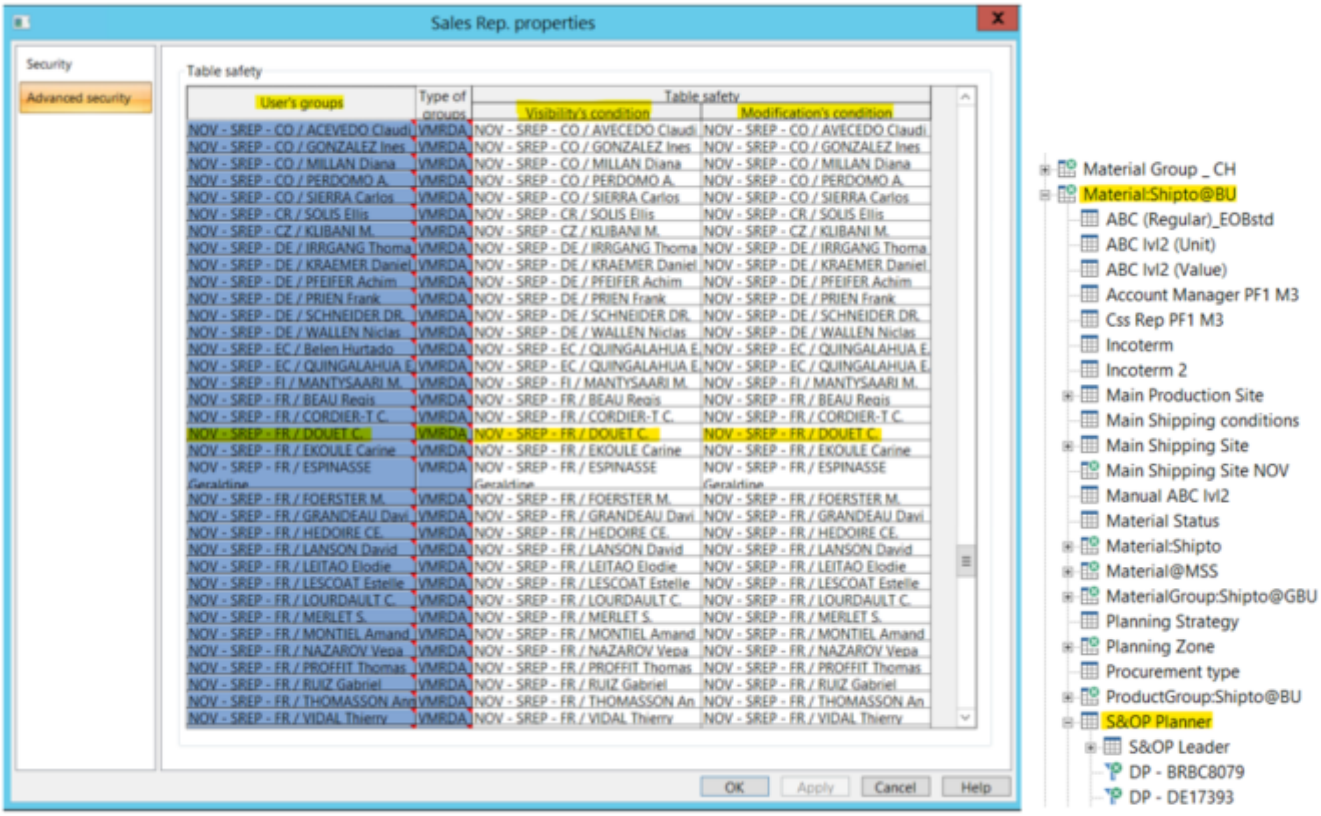
>>> This step should be done during a release.





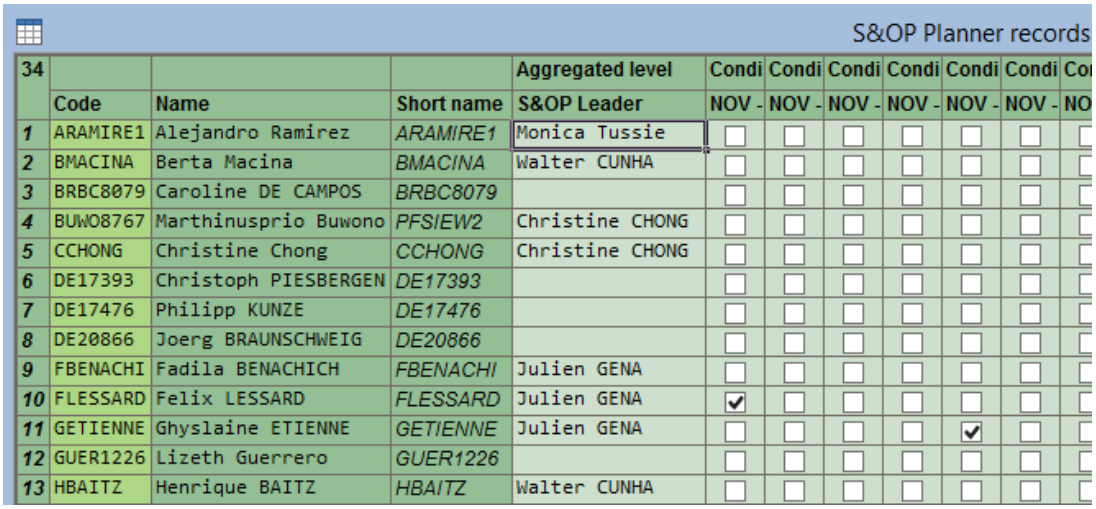
Update the security of master tables: “S&OP Planner” > Right click > Security > Advanced security > Go to user group line (created step before) and put the condition (created before)

Repeat this step for all master tables which are parents of “S&OP Planner” table (the most important one is : Material:Shipto@DC table)



+ Link between S&OP Leader and S&OP Planner:

- Update the S&OP Planner table and assign the correct S&OP Leader to the correct S&OP Planner, with related data field.



34				Aggregated level	Condi	Condi	Condi	Condi	Condi	Condi	Co
	Code	Name	Short name	S&OP Leader	NOV -	NOV -	NOV -	NOV -	NOV -	NOV -	NO
1	ARAMIRE1	Alejandro Ramirez	*ARAMIRE1*	Monica Tussie	☐	☐	☐	☐	☐	☐	☐
2	BMACINA	Berta Macina	*BMACINA*	Walter CUNHA	☐	☐	☐	☐	☐	☐	☐
3	BRBC8079	Caroline DE CAMPOS	*BRBC8079*		☐	☐	☐	☐	☐	☐	☐
4	BUWO8767	Marthinusprio Buwono	*PFSIEW2*	Christine CHONG	☐	☐	☐	☐	☐	☐	☐
5	CCHONG	Christine Chong	*CCHONG*	Christine CHONG	☐	☐	☐	☐	☐	☐	☐
6	DE17393	Christoph PIESBERGEN	*DE17393*		☐	☐	☐	☐	☐	☐	☐
7	DE17476	Philipp KUNZE	*DE17476*		☐	☐	☐	☐	☐	☐	☐
8	DE20866	Joerg BRAUNSCHWEIG	*DE20866*		☐	☐	☐	☐	☐	☐	☐
9	FBENACHI	Fadila BENACHICH	*FBENACHI*	Julien GENA	☐	☐	☐	☐	☐	☐	☐
10	FLESSARD	Felix LESSARD	*FLESSARD*	Julien GENA	☑	☐	☐	☐	☐	☐	☐
11	GETIENNE	Ghyslaine ETIENNE	*GETIENNE*	Julien GENA	☐	☐	☐	☐	☑	☐	☐
12	GUER1226	Lizeth Guerrero	*GUER1226*		☐	☐	☐	☐	☐	☐	☐
13	HBAITZ	Henrique BAITZ	*HBAITZ*	Walter CUNHA	☐	☐	☐	☐	☐	☐	☐

S&OP Leader

Create the user:

Login: Windows ID

Description: OG / SOP Leader / Country Code / First and last name

Assign the user to following user groups:

OG - S&OP Leader

Create the user Group:

Create a new user group (DO NOT DUPLICATE AN EXISTING ONE)

Name: OG - S&OP Leader - Mini Zone / First and last name

Assign to this user group the user created

Delete any other existing assignments copied from duplicata

Create condition:

Under table S&OP Leader

Name: OG - S&OP Leader - Mini Zone - First and last name

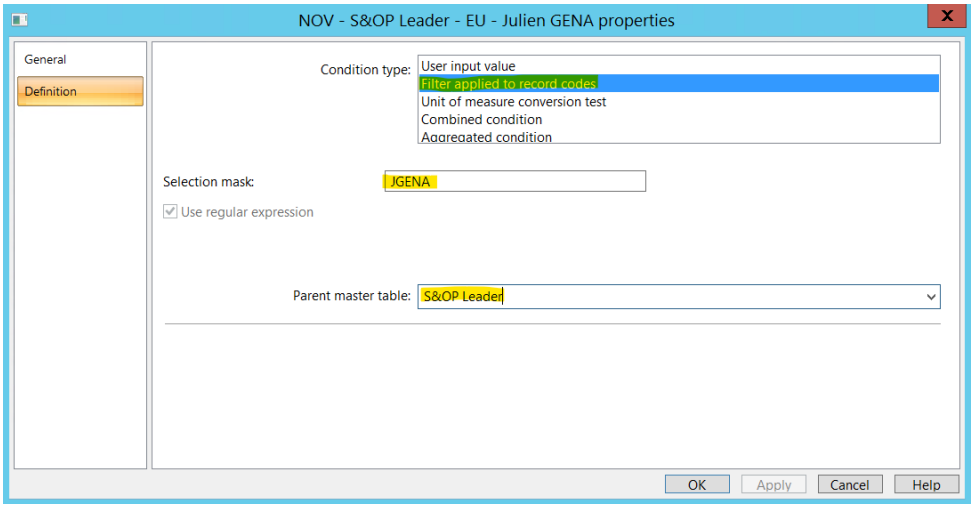
Type: Filter applied to record codes

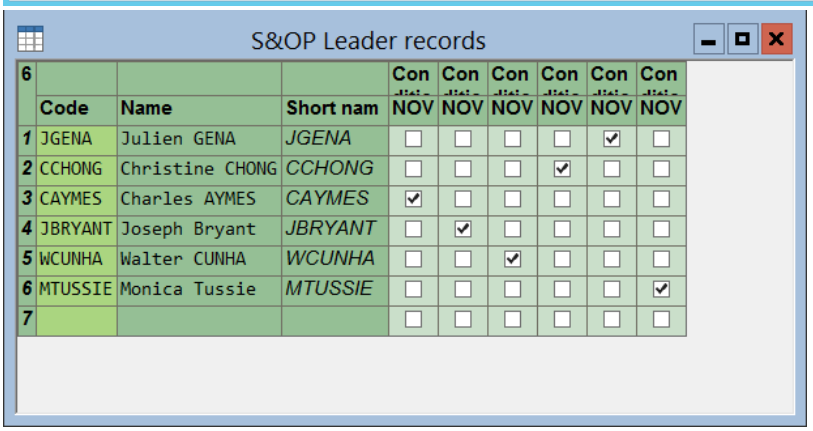
Selection mask: code of the S&OP Leader (Search in S&OP Leader table the name of the S&OP planner you want to create, use his code in this field)

Add ^ at the beginning of the code

Add $ at the end of the code

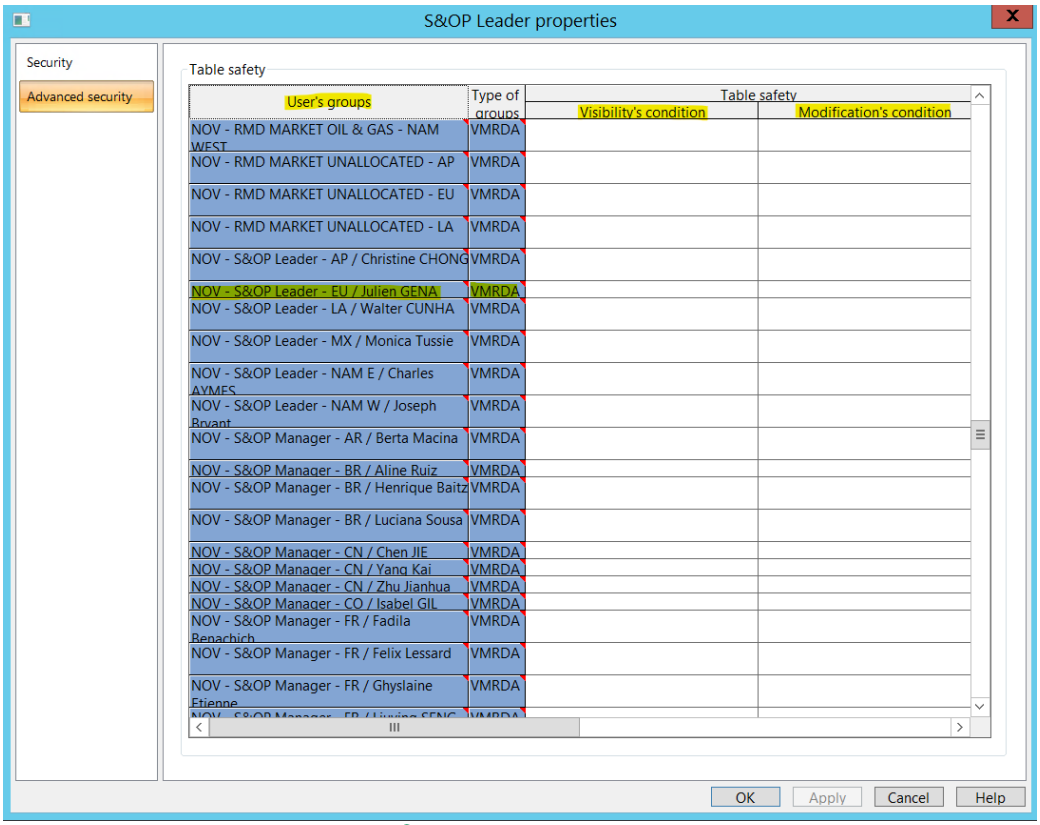
>>> This step should be done during a release.

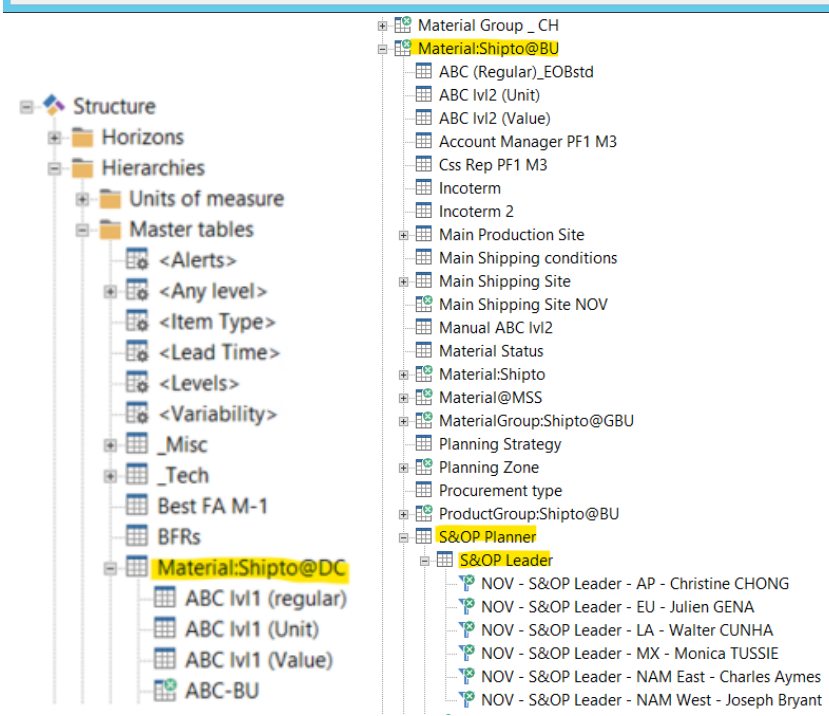




Update the security of master tables: “S&OP Leader” > Right click > Security > Advanced security > Go to user group line (created step before) and put the condition (created before)

Repeat this step for all master tables which are parents of “S&OP Leader” table (the most important one is : Material:Shipto@DC table)

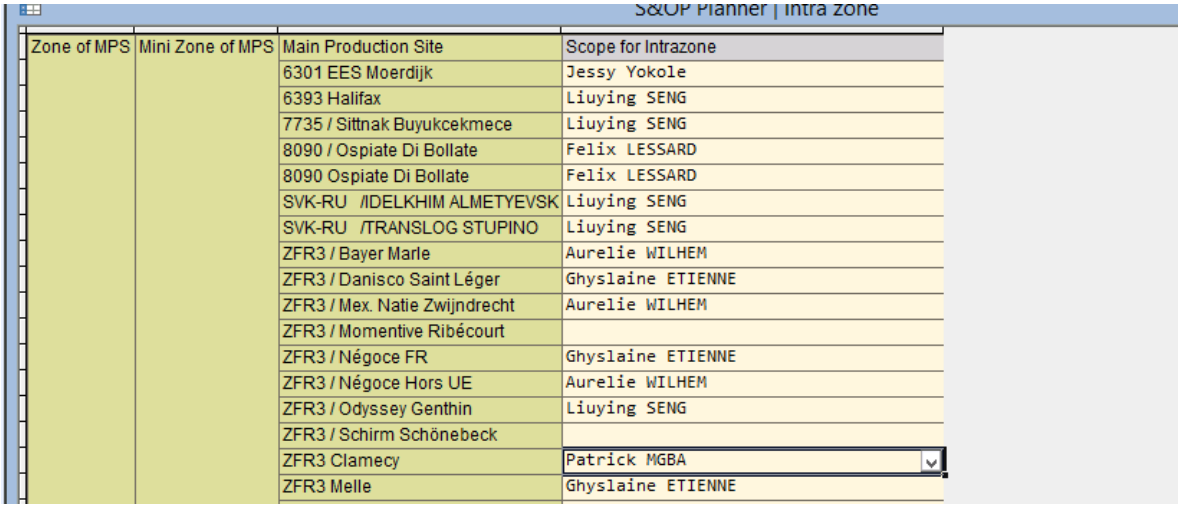




Assign sites to the S&OP leaser :

Open Workspace NOVECARE - A0 User right Management

Assign his site to the planner in tabs Intra zone flow and Inter zone flow



Zone of MPS	Mini Zone of MPS	Main Production Site	Scope for Intrazone
		6301 EES Moerdijk	Jessy Yokole
		6393 Halifax	Liuying SENG
		7735 / Sittnak Buyukcekmece	Liuying SENG
		8090 / Ospiate Di Bollate	Felix LESSARD
		8090 Ospiate Di Bollate	Felix LESSARD
		SVK-RU /IDELKHIM ALMETYEVSK	Liuying SENG
		SVK-RU /TRANSLOG STUPINO	Liuying SENG
		ZFR3 / Bayer Marle	Aurelie WILHEM
		ZFR3 / Danisco Saint Léger	Ghyslaine ETIENNE
		ZFR3 / Mex. Natie Zwijndrecht	Aurelie WILHEM
		ZFR3 / Momentive Ribécourt	
		ZFR3 / Négoce FR	Ghyslaine ETIENNE
		ZFR3 / Négoce Hors UE	Aurelie WILHEM
		ZFR3 / Odyssey Genthin	Liuying SENG
		ZFR3 / Schirm Schönebeck	
		ZFR3 Clamecy	Patrick MGBA
		ZFR3 Melle	Ghyslaine ETIENNE