

*OBS*WP2 - ZERS Material Master Data NAM

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Scope



ERP



References

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1. Objective and Scope

1.1 Objective of this Procedure

This document is a complement to Standard Operating Procedure "Article Creation and Management", adapting the process to North America. The Material Master Data management includes the material's creation, modification and deletion flags, as well as the Storage, MRP and Purchasing Views and PIR creation. These items will be presented in this procedure.

Requests can be performed by the Stockroom Coordinator or the Buyer, in this case, the request is auto-approved, as the Buyer is responsible for reviewing and approving the requests.

All requests are sent to Master Data via e-mail or Webform

E-mail: general.3s-codif@solvay.com

WebForm: <https://sites.google.com/a/solvay.com/solvay-buyer-portal/>

The PtP Portal User's guide can be found at: https://docs.google.com/a/solvay.com/presentation/d/1rln_Sp3OadG6nZUJLrd7VTJjYBUvCa1IsiPfyh7BNNk/edit#slide=id.p

The referral material mentioned in this procedure, such as ZHS Material Code List and Languages List are contained in the Main Master Data file.

This document's objective is to provide a guide to managing Material Master Data.

1.2 Scope

Under Master Data's scope, is the management of Industrial Supplies for NAM region.

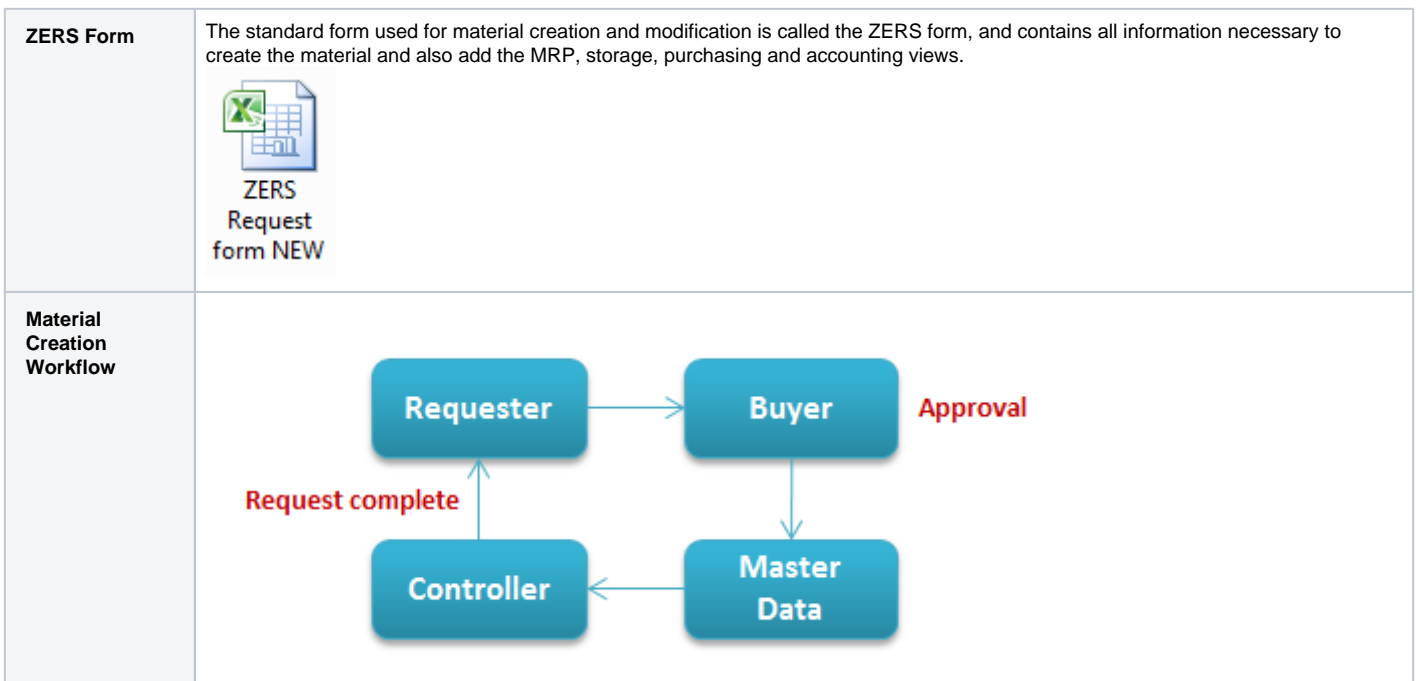
2. Main Part

2.1 Roles and Responsibilities

Requester	Prior to submitting a new request, it is the requester's responsibility to ensure the material does not exist in SAP already, so no duplicates are created in the system. If the material was not found, the ZERS form must be filled and submitted for the Buyer's review and approval. Once the authorization is obtained, the form and approval must be sent to Master Data team.
Master Data	Requests are received by the team, who will check if the form was filled correctly and if the required approval was obtained. A second search in the system is performed by the team, to ensure no duplicates are created. After the material and views are created, the request is forwarded to the site's Controller, who will create the Accounting View and finish the material creation process.

2.2 Creating Material



Description	Requests for material creation can be performed by the Stockroom Coordinator or the Buyer, in this case, the request is auto-approved, as the Buyer is responsible for reviewing and approving the requests.
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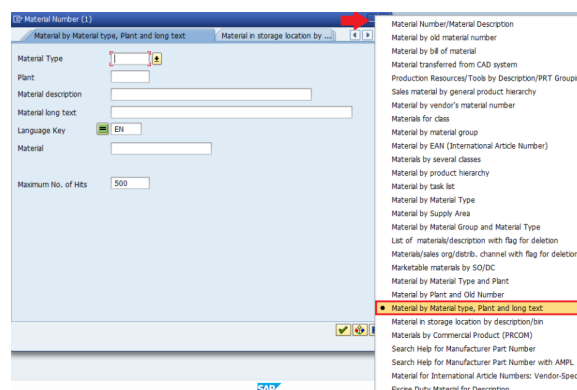
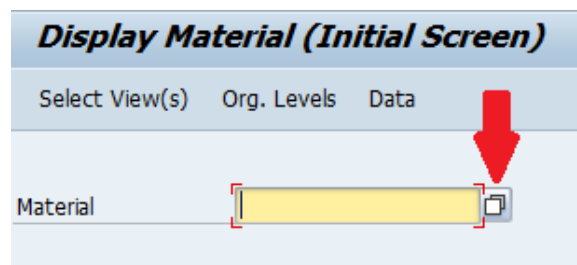


Checking duplicates

The requester is responsible for checking if the material is already created in the system, however, Master Data performs a final check, as explained below:

Go to SAP MM03

- Click on 
- Click on  to open the menu
- Select the option Material by Material type, Plant and long text



- Material type: ZERS

ZERS is the material type used for industrial supplies

Material description: Information available in the requester's form, under Material Short Description

Use * between words to search a range of words. For example: V*LV will bring as result the words VALVE and abbreviation VLV

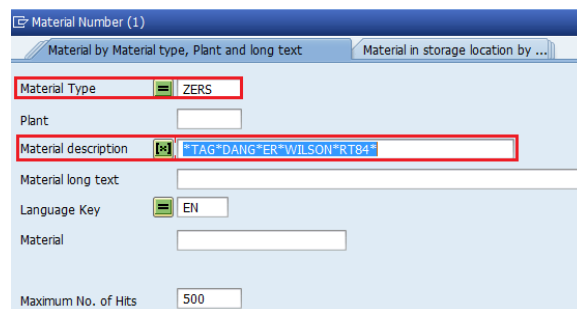
If the material has been found, it means it is possible that the request is a duplication, so contact the requester for verification. Inform the RCS material number and description for reference.

If the material was not found, continue the material creation.

Creating Material MM01


Go to SAP transaction MM01

- Industrial Sector: Chemical industry



- Material type: /Industrial Supplies

Enter

- Select Basic Data 1 and Basic Data 2 

On Basic data 1, the material number is filled automatically by the system. The remaining items, should be completed as detailed below:

- Short description: available in ZERS form

Check the ZERS form for the nomenclature's rules

- Base Unit of Measure: available in ZERS form

The base UOM should be the smallest unit possible. For example, if the material is requested by case, the base UOM should be each and the alternate UOM should be case.

Division for ZERS (Industrial Supplies)

- Material Group: available in ZERS form

- Division: WA

On Basic Data 2, follow the instructions below:

Check if the Material Group available in the ZERS form is included in the ZHS Material Code List.

- Check DG indicator profile
- Click on Additional Data

The ZHS Material Code List provides all material groups that should receive the Dangerous Group indicator ZHS, which means Supplies subject to Health, Safety and Environment requirements, printed in the PO.

On the Descriptions tab, complete the fields described below:

- Complete the Language field with the information found in the Languages list
- Copy the first line of the Material Description to the remaining lines

The first line will be populated automatically

If the base UOM is different from the Ordering UOM, there should be an Alternate Unit of Measure mentioned in the ZERS form. Complete the Units of measure tab with that information:

- Fill the second line with your Alternate UOM

In this example, 12 each = 1 case

On the Basic Data Text tab:

- Add the Long Description available in the ZERS form
- Copy the Material number and paste it in the ZERS form for future reference



2.3 Creating the MRP / Storage Views

MM01

Go to SAP transaction MM01

- Insert the material number
- Industry sector = Chemical Industry
- Material Type = Industrial Supplies

Enter

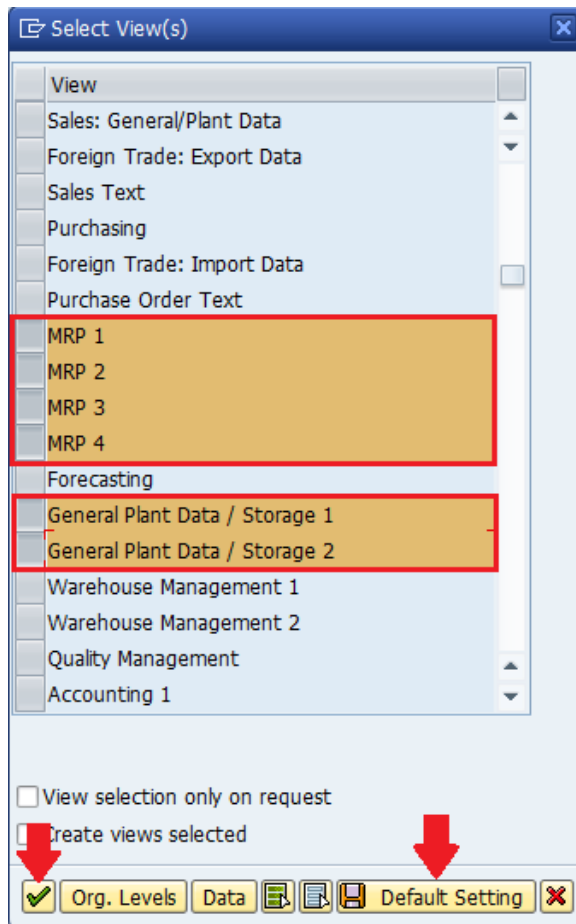
Language	Material Description
FR	TAG,DANGER,WILSON PART #RT84
IT	TAG,DANGER,WILSON PART #RT84
ES	TAG,DANGER,WILSON PART #RT84
DE	TAG,DANGER,WILSON PART #RT84
PT	TAG,DANGER,WILSON PART #RT84
PL	TAG,DANGER,WILSON PART #RT84
SK	TAG,DANGER,WILSON PART #RT84
EN	TAG,DANGER,WILSON PART #RT84
KO	TAG,DANGER,WILSON PART #RT84
JA	TAG,DANGER,WILSON PART #RT84
ZH	TAG,DANGER,WILSON PART #RT84

X	Alin	M...	<... Y	Bun	Len...	Width	Height	Un...	Volume	Vo...	Gross W...
1	EA	Per...	<... 1	EA							
1	CS	<... 12	EA								

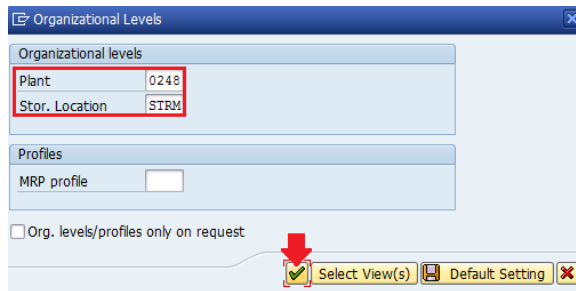
- Select all MRP views
- Select all General Plant Data / Storage views



When working with more than 1 item, the Default Setting button can be used so the views are automatically selected.



- Plant: Info in ZERS form
- Stor. Location: Info in ZERS form

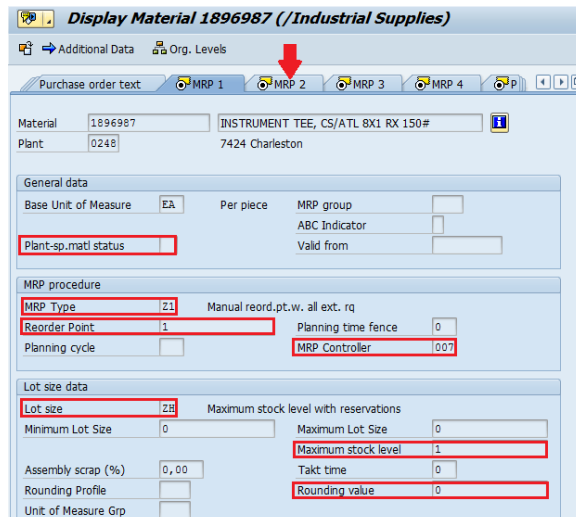


- Plant-sp. Matl status

A block (Z1) can be set in this field so the material cannot be used until all views are created.

- MRP Type: Info in ZERS form
- Reorder Point: Info in ZERS form
- MRP Controller: Info in ZERS form
- Lot Size: Info in ZERS form
- Max stock level: Info in ZERS form
- Rounding value: Info in ZERS form (Optional field)

Go to MRP 2 tab



- Prod stor. Location: Info in ZERS form
- Storage loc. For EP: Info in ZERS form
- Planned Deliv. Time: Info in ZERS form
- SchedMargin key: 000
- Safety Stock: Info in ZERS form

Go to MRP 3 tab

Display Material 1896987 (/Industrial Supplies)

Additional Data Org. Levels

MRP 1 MRP 2 MRP 3 MRP 4 Plant data / stor. 1

Material 1896987 INSTRUMENT TEE, CS/ATL 8X1 RX 150#
Plant 0248 7424 Charleston

Procurement

Procurement type Batch entry
Special procurement Prod. stor. location STRM
Quota arr. usage Default supply area
Backflush Storage loc. for EP STRM
JIT delivery sched. Stock det. grp
 Bulk Material

Scheduling

GR Processing Time 1 days Planned Deliv. Time 3 days
SchedMargin key 000 Planning calendar

Net requirements calculation

Safety Stock 0 Service level (%) 0,0
Min safety stock 0 Coverage profile
Safety time ind. Safety time/act.cov. 0 days
STime period profile

- Availability check: Info in ZERS form

Go to MRP 4 tab

No info is entered in this tab, however it must be created as well

Go to Plant Data/Stor 1 tab

Display Material 1896987 (/Industrial Supplies)

Additional Data Org. Levels

MRP 2 MRP 3 MRP 4 Plant data / stor. 1 Plant data ...

Material 1896987 INSTRUMENT TEE, CS/ATL 8X1 RX 150#
Plant 0248 7424 Charleston

Forecast Requirements

Period Indicator Fiscal Year Variant Splitting indicator

Planning

Strategy group Bwd consumption per. 0
Consumption mode Mixed MRP
Fwd consumption per. 0 Planning material
Ping conv. factor Planning plant
Planning matl BUnit

Availability check

Availability check 02 Tot. repl. lead time 0 days
Cross-project

Plant-specific configuration

ConfigurableMaterial
 Variant

- Storage Bin: Info in ZERS form

If the information was not provided in the form, insert NEW ITEM. The plant will later fill the actual bin reference.

Go to Plant data/stor 2 tab

Change Material 1896987 (/Industrial Supplies)

Additional Data Org. Levels Check Screen Data

MRP 4 Plant data / stor. 1 Plant data / stor. 2 Accounting 1 Accou...

Material 1896987 INSTRUMENT TEE, CS/ATL 8X1 RX 150#
Plant 0248 7424 Charleston
Stor. Loc. STRM Storeroom

General data

Base Unit of Measure EA Per piece Unit of issue
Storage Bin C9-7A Picking area
Temp. conditions Storage conditions
Container reqmts Haz. material number
CC phys. inv. ind. CC fixed Number of GR slips
Label type Lab.form Appr.batch rec. req.
 Batch management

Shelf life data

Max. storage period Time unit
Min. Rem. Shelf Life Total shelf life
Period Ind. for SLED Rounding rule SLED
Storage percentage

- Profit Center: Info in ZERS form



After creating the MRP and Storage views, the next step is to create the Purchasing View.

Display Material 1896987 (/Industrial Supplies)

Additional Data Org. Levels

Plant data / stor. 1 Plant data / stor. 2 Accounting 1 Accounting 2 P...

Material 1896987 INSTRUMENT TEE, CS/ATL 8X1 RX 150#
Plant 0248 7424 Charleston
Stor. Loc. STRM Storeroom

Weight/volume

Gross Weight 0,000 Weight unit
Net Weight 0,000
Volume 0,000 Volume unit
Size/dimensions

General plant parameters

Neg. stocks in plant SerLevel Log. handling group
Serial no. profile Distr. profile
Profit Center 0248-20449 Stock determ. group

2.4 Creating the Purchasing View

MM01

Enter SAP transaction MM01

- Enter the material code

Enter

Create Material (Initial Screen)

Select View(s) Org. Levels Data

Material	1896941
Industry sector	
Material Type	
Change Number	

Copy from...

Material	
----------	--

- Select the Purchasing View



Select View(s)

View
Basic Data 1
Basic Data 2
Classification
Sales: Sales Org. Data 1
Sales: Sales Org. Data 2
Sales: General/Plant Data
Foreign Trade: Export Data
Sales Text
Purchasing
Foreign Trade: Import Data
Purchase Order Text
MRP 1
MRP 2
MRP 3
MRP 4
Forecasting
General Plant Data / Storage 1

View selection only on request
 Create views selected

Org. Levels Data Default Setting

- Plant: Information available in the ZERS form



Organizational Levels

Organizational levels

Plant: 0248

Org. levels/profiles only on request

Select View(s) Default Setting

- Purchasing Group: Search for the information in the Main Master Data file, using the plant as reference
- Check the Autom. PO box
- Purchasing Value Key: 0004
- GR Processing Time: 1
- If the material is listed in the ZERS form as critical, check the Critical part box



After the Purchasing View is created, the next step is to create the Purchasing Info Record.

2.5 Creating a Purchasing Info Record

Description

The PIR is a method for managing the purchase price. An alternate management method is a contract. When a contract exists, then the PIR should not be used for the same material.

A new PIR is created when a purchase from a new material/supplier combination is needed. Within the PIR there is another unique combination named Purchasing Org. Data, formed by the combination of the Purchasing Org., Info Category and Plant Code. If one of those elements is changed, this results in a new record within the PIR.

In the PIR's General View the WW fields are available. These fields determine the information common to all plants using the material/supplier combination.

The PIR's maintenance is the buyer's and LPR's responsibility. Any information missing in the ZERS form (previously approved by the buyer) and necessary in the PIR should be completed by them.

Creating PIR

Check if the material has a Z1 Plant-supplier material status. This code means that the material creation is in progress, so it blocks the creation of the PIR and consequently, the PO.

To check and remove the Z1 block, go to SAP transaction MM02

- Insert the material number

Enter

- Select the Purchasing View



- Plant Number: Available in the ZERS form



If the field Plant-sp.matl status is populated, deleted its contents



Go to SAP transaction ME11

Insert the information below:

- Vendor: Information available in the ZERS form
- Material: Insert the material code created
- Purchasing Org: 3012

3012: Industrial Supplies North America

- Plant: information available in the ZERS forms

After all the information is filled in the first screen, press Enter

- Vendor Mat. No.: Information available in the ZERS form under column Supplier Part #
- Salesperson: Information available in the ZERS form
- Telephone: information available in the ZERS form
- Order Unit: Insert the alternate UOM in case it was provided

Enter

- Pl. Deliv. Time: Already populated
- Purch. Group: Check the Main Master Data file for the Buyer to the specific plant in use. After that, check the buyer's Purch. Group.
- Standard Qty: 1
- Tax Code: LN

LN: US – AP Sales tax

- Price: information available in the ZERS form

- Incoterms: information available in the ZERS form

Go to Conditions tab

- Update the validity period

The validity period is usually extended to 2 years



Go to Texts tab

- Double click in the Purchase order text field

- Insert the material's long description, available in the ZERS form



OBS: For imported materials, the following fields must be entered: Country of Origin, Region, appropriate Tax Code and Configuration Control (Z003 or Z004).

2.6 Changing a Material

Description

Requests to update a material can be sent by the Storeroom administrator, Buyer or LPR.

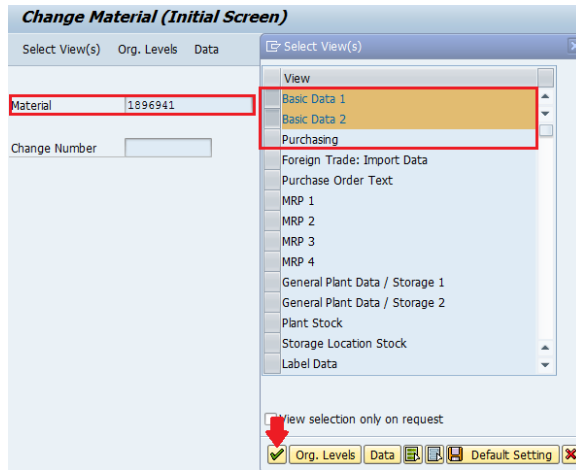
The information that is setup in tabs Basic Data 1 and Basic Data 2 are common to all plants that use the material. To update information present in those tabs, approval from all Storeroom personal from the different plants is necessary. Purchasing views are plant specific, so no approval is required.

Changing Material

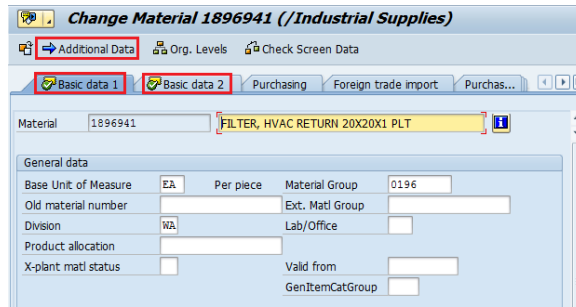
MM02

Go to SAP transaction MM02

- Insert the material number
- Enter
- Select the views desired



- Change the information in the respective tab



2.7 Deletion Flags

2.7.1 PIR Deletion Flag

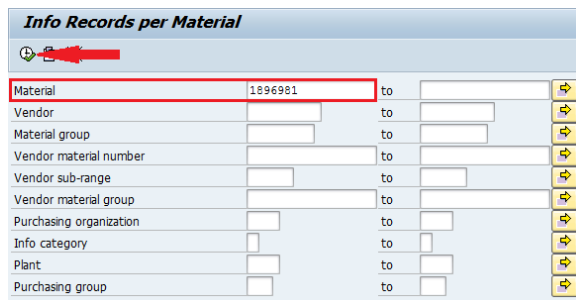
Description

If a new vendor will be used to supply a material or that material is no longer in use, a request to add a deletion flag for a PIR will be received.

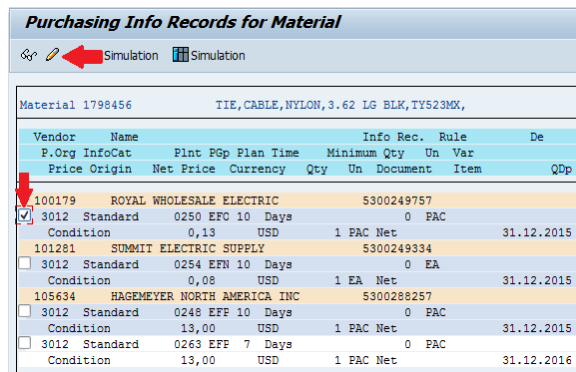
Deletion Flag

Go to SAP transaction ME1M

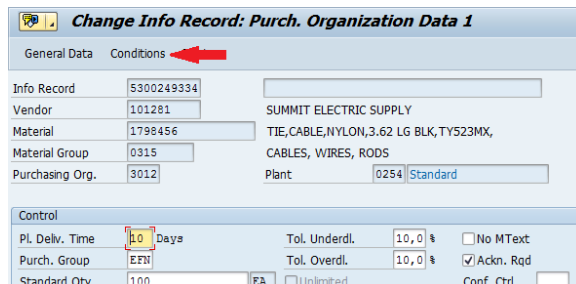
- Insert the material number



- Select the PIR desired



Go to Conditions tab



Double click on the Validity period

Validity Periods: Conditions

Select a validity period or create a new time period.

Valid From	Valid To
03.03.2009	31.12.2015

- Change the Valid to field to a past date



Change Gross Price Condition (PB00) : Condition Supplements

Variable key	Vendor	Material	P Org	Plant	C	Description
	101281	1798456	3012	0254	0	Standard

Validity

Valid From: 03.03.2009

Valid to: 31.12.2013

- Change the Purch. Group field to E00

Purch. Group used for deleted items. E00 = Corporate

Go to Extras

Go to Deletion Flags

Info Record Edit Extras Environment System Help

Change Info Record

General Data Conditions Texts

Info Record: 5300249334

Vendor: 101281

Material: 1798456

Material Group: 0315

Purchasing Org.: 3012

Control

Pl. Delv. Time: 10 Days

Purch. Group: E00

Standard Qty: 100 EA

Minimum Qty: EA

Tol. Underdl.: 10,0 %

Tol. Overdl.: 10,0 %

No MText:

Ackn. Rqd:

Conf. Ctrl:

Tax Code: LN

Check Deletion flag box desired

The complete info record box blocks the PIR from being used by all plants associated to it. Before checking this box, make sure to verify with all plants if that is convenient.



Change Info Record: Purch. Organization Data 1

General Data Purch. Org. Data 1 Conditions Texts

Info Record: 5300249334

Vendor: 101281

Material: 1798456

Material Group: 0315

Purchasing Org.: 3012

SUMMIT ELECTRIC SUPPLY

TIE, CABLE, NYLON, 3.62 LG BLK, TY523M

CABLES, WIRES, RODS

Plant: 0254 Standard

Deletion flags

Complete info record

Purch. org. data

2.7.2 Material Deletion Flag

Description

If the material is no longer in use, a request to add a deletion flag to it will be received. The deletion flag can be added to either the material or plant level. In the material level, all plants using the material will be affected. In this case, the approval from all plants is necessary. The plant level will affect only a specific plant, so other locations will still be able to request that particular material.

Deletion Flag

Go to SAP transaction MM06

- Input the material number
- Input the plant number

If the material is shared by multiple plants, the deletion flag must be added to the requester plant only, with exception of having approval from all plants

Enter

Material	1798456
Plant	0254
Stor. Location	
Valuation Type	
Sales Org.	
Distr. Channel	
Warehouse No.	
Storage Type	
Change Number	

- Check the material box if the deletion flag will be added to material level
- Check the plant box if the deletion flag will be added to the plant level



Flag Material for Deletion: Data Screen

Material 1798456 TIE, CABLE, NYLON, 3.62 LG BLK, TY523MX

Plant 0254 7424 Houston

Storage Location

Valuation Type

2.8 Updating Price and Validity Period

Description

Requests to update the PIRs validity period can be received.

Go to SAP transaction ME1M

- Insert the material number



Info Records per Material

Material 1798456 to

Vendor to

Material group to

Vendor material number to

Vendor sub-range to

- Select the PIR desired



Purchasing Info Records for Material

Material 1798456 TIE, CABLE, NYLON, 3.62 LG BLK, TY523MX

Vendor	Name	Info Rec.	Rule	De			
P.Org	InfoCat	Plnt	PGp	Plan Time	Minimum Qty	Un	Var
Price Origin	Net Price	Currency	Qty	Un	Document	Item	QDp
100179	ROYAL WHOLESALE ELECTRIC	5300249757					
<input checked="" type="checkbox"/>	3012 Standard	0250 EFO 10 Days			0	PAC	
	Condition	0,13 USD	1	PAC Net			31.12.2016
101281	SUMMIT ELECTRIC SUPPLY	5300249334					
<input type="checkbox"/>	3012 Standard	0254 EFN 10 Days			0	EA	
	Condition	0,08 USD	1	EA Net			31.12.2015
105634	HAGEMEYER NORTH AMERICA INC	5300288257					
<input type="checkbox"/>	3012 Standard	0248 EFF 10 Days			0	PAC	
	Condition	13,00 USD	1	PAC Net			31.12.2015
<input type="checkbox"/>	3012 Standard	0263 EFF 7 Days			0	PAC	
	Condition	13,00 USD	1	PAC Net			31.12.2016

Go to Conditions tab

Change Info Record: Purch. Organization Data 1

General Conditions Texts

Info Record 5300249757

Vendor 100179

Material 1798456

Material Group 0315

Purchasing Org. 3012

Control

Pl. Deliv. Time 10 Days

Purch. Group EFO

Standard Qty 1

Minimum Qty

Rem. Shelf Life

Origin Accept.

Shippg Instr.

Max. Quantity

Conditions

Net Price 0,13

Validity Periods: Conditions

Select a validity period or create a new time period.

Validity periods

Valid From	Valid to
11.03.2009	08.05.2014
15.05.2014	31.12.2016

Choose New validity period New with reference

- Add price
- Add validity period



Create Gross Price Condition (PB00) : Condition Supplements

Variable key

Vendor	Material	POrg	Plant	C	Description
100179	1798456	3012	0250	0	Standard

Validity

Valid From	15.05.2014	Valid to	31.12.9999
------------	------------	----------	------------

Condition supplements

CnTy	Name	Amount	Unit	per	U...	Deletio...	Scales	Texts
PB00	Gross Price	0,33	USD	1	PAC		<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>