

SRM Support Guide

Document Control Information

Document Edit History

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Table of Contents

Administrative Tasks	4
Shopping cart ownership transfer process	4
Adding/Modifying Product Categories	16
Adding/Modifying Company Codes	16
Adding/Modifying SRM Doc types	17
Adding/Modifying Account Assignment Category (If required)	18
Using the Work Item ID	21

List of Figures

Figure 1:	Shopping Cart.....	4
Figure 2:	Approval Compliance Report.....	4
Figure 3:	Creation Date.....	5
Figure 4:	Shopping Cart Ownership Change.....	5
Figure 5:	Select Team Shopping Carts.....	6
Figure 6:	Shopping Cart Ownership Change.....	6
Figure 7:	SC Visibility after SC Ownership Transfer document.....	6
Figure 8:	Product Categories.....	7
Figure 9:	Data Browser Table EKKO Selection Screen.....	7
Figure 10:	Data Browser Table EKKO Select Entries 10.....	8
Figure 11:	Data Browser Table EKET Select Entries 12.....	8
Figure 12:	Purchasing Document Table (1).....	9
Figure 13:	Purchasing Document Table (2).....	9
Figure 14:	Select Single Values (4).....	10
Figure 15:	Approval Compliance Report Purchase Order and Creation Date.....	10
Figure 16:	Shopping Cart Ownership Change (1).....	11
Figure 17:	Select Team Shopping Cart.....	11
Figure 18:	Shopping Cart Ownership Change (2).....	12
Figure 19:	General Attributes (EBP) Change.....	12
Figure 20:	General attributes (EBP) Change Find User (1).....	13
Figure 21:	Search term.....	13
Figure 22:	General attributes (EBP) Change (3).....	14
Figure 23:	Users Record.....	14
Figure 24:	General Attributes (EBP) Change (4).....	15
Figure 25:	Select Extended Attributes Tab.....	16
Figure 26:	Adding Modifying Product Categories.....	16
Figure 27:	Details for Position.....	17
Figure 28:	Insert Line Icon.....	17
Figure 29:	Adding/Modifying SRM Doc types.....	18
Figure 30:	Details for Position overview and Account Assignment Category.....	18
Figure 31:	Transfer Supplier Master Records.....	19
Figure 32:	Display Workflows: Select an Object.....	20
Figure 33:	Data on Linked Workflows.....	21
Figure 34:	Workflow Log.....	21
Figure 35:	Process Work Items as Administrator.....	22
Figure 36:	Process Work Item as Administrator (1 Entry).....	22
Figure 37:	Choose Agent.....	23
Figure 38:	Data Browser: Table ZMM_PUR_DETERMINE: Selection Screen.....	24
Figure 39:	Workitem ID.....	24
Figure 40:	Process Work Item as administrator.....	25
Figure 41:	Restart after Error.....	25

1. Overview

The purpose of this document is to demonstrate to the reader how to use and support the SRM software.

Administrative Tasks

Shopping cart ownership transfer process

Scenario 1: A specified shopping cart is needed to be transferred to another user.

Step 1: Open the shopping cart and locate in the ticket the creation date and company code.

If multiple shopping carts are present, the carts can be entered as input in report t-code: ZSRM_APPROVALCOMP (compliance report).

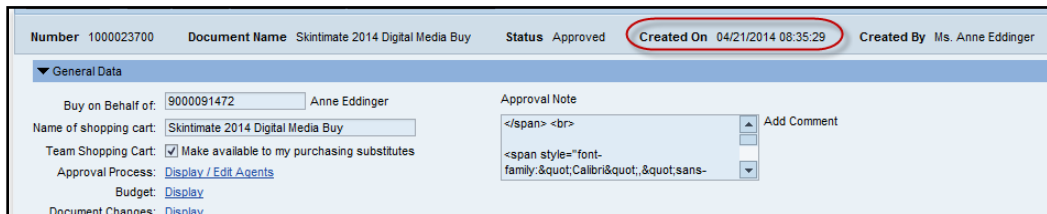


Figure 1: Shopping Cart

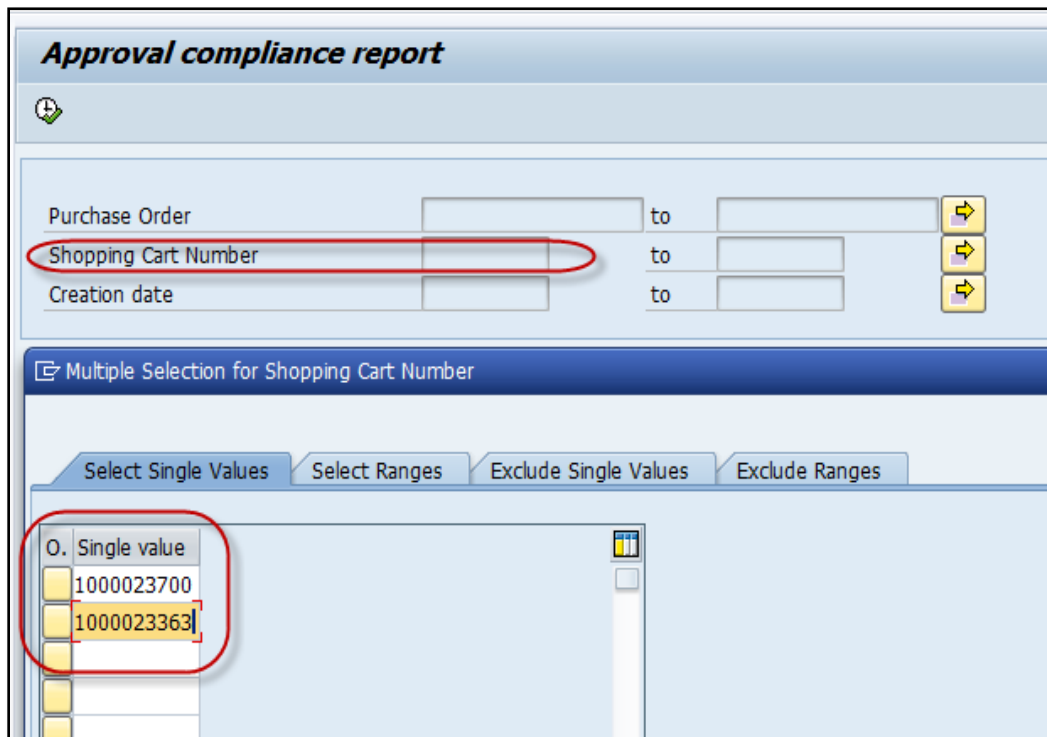


Figure 2: Approval Compliance Report

Approval compliance report

PO#	BACKENDSYS	SC#	Creation date	Description	COMP CODE
94000024...	PRDCLNT400	1000023363	04/16/2014	Women's 16-24 Cross Brand Media Buy	1000
94000025...	PRDCLNT400	1000023700	04/21/2014	Skintimate 2014 Digital Media Buy	1000

Figure 3: Creation Date

- Step 2: In the SRM backend, run the t-code: ZMM_CHANGE_OWNERSHIP
- Step 3: Enter the original shopping carts owner's User ID in the shopping cart Owner ID box.
- Step 4: Enter the substituting shopping carts owner's User ID in the Team Substitute ID box.
- Step 5: Enter the company code.
- Step 6: In SC Creation Date, enter a range date beginning 1 or 2 days prior to the shopping cart's creation date and a date 1 or 2 days after.
- Step 7: Select "ALL" in the Item Status scroll down.
- Step 8: Select the clock face with the green checkmark in the upper left-hand-corner to execute the report.

Shopping Cart Ownership Change

SC Owner ID: EDDINGAN


Team Substitute ID: CUCCAROA

Company Code: 1000

SC creation Date: 04/19/2014 to 04/22/2014

Item Status: ALL

Figure 4: Shopping Cart Ownership Change

- Step 9: System will display the shopping cart number which is being transferred.
- Step 10: Select the checkbox and click .

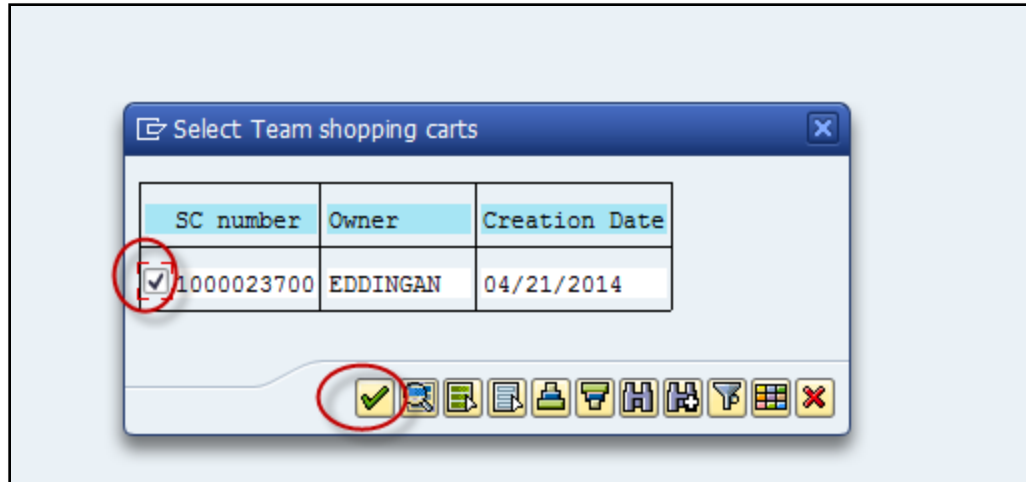


Figure 5: Select Team Shopping Carts

Step 11: Once you select the checkbox you will receive the below notification that substitute is created and purchase order is updated.



Figure 6: Shopping Cart Ownership Change



SC visibility after SC ownership transfer.d

Figure 7: SC Visibility after SC Ownership Transfer document

Scenario 2: User wants all open purchasing orders to be transferred from one user to another user.

Step 12: Access PPOMA_BBP and check which backend system is assigned to the user. For example: Ann Eddinger (EDDINGAN) belongs to OTC (PRDCLNT400)

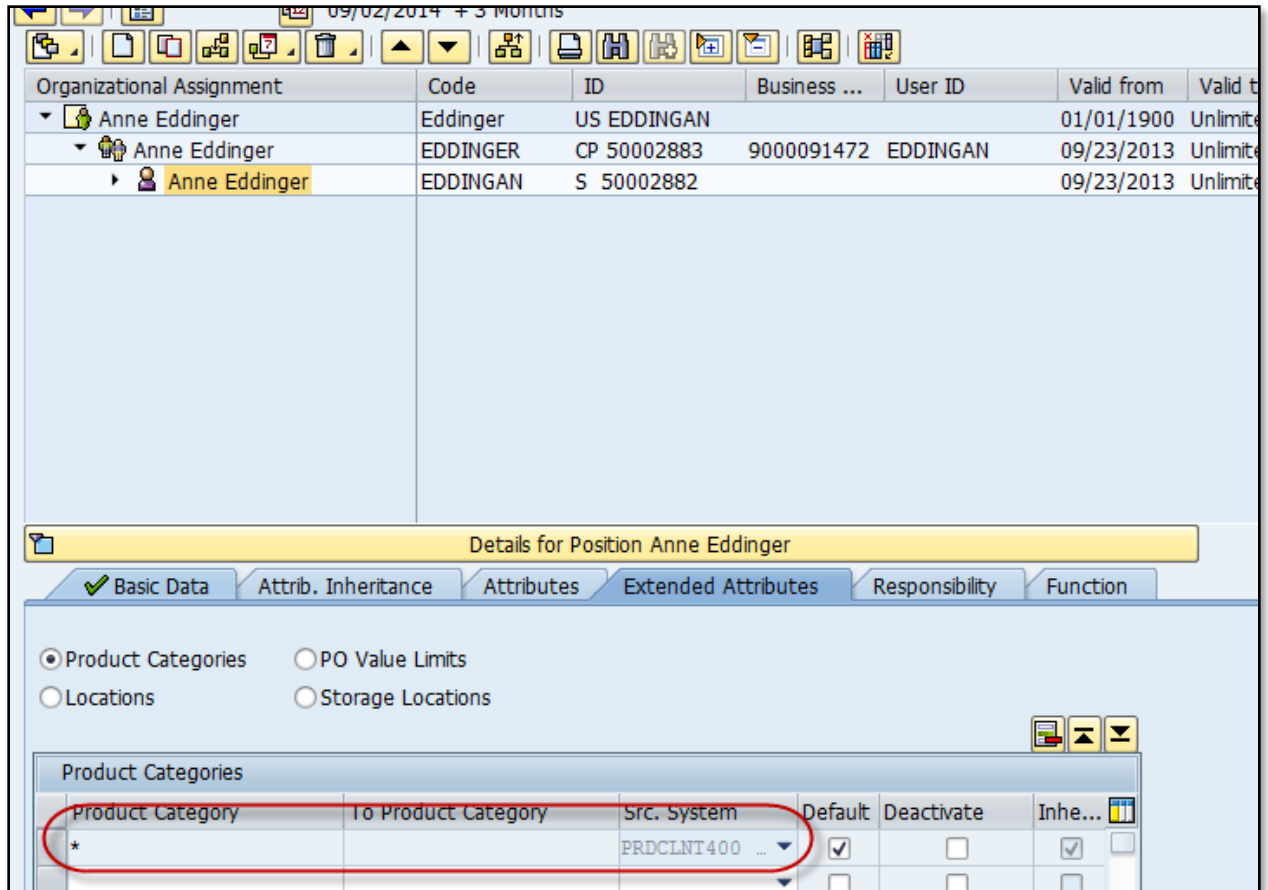


Figure 8: Product Categories

Step 13: Go to OTC backend system and check the list of purchase orders created by the user in table EKKO.

For example using doc type ZSCM & ZCMO and created by User ID (EDDINGAN). The report can be exported as excel file.

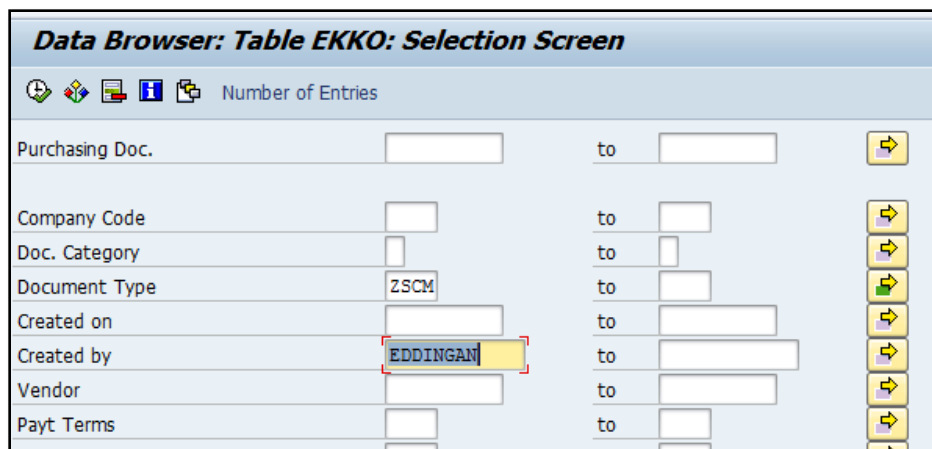


Figure 9: Data Browser Table EKKO Selection Screen

Data Browser: Table EKKO Select Entries 10

Cl.	Purch.Doc.	CoCd	C	Type	Ctl	D	S	Created on	Created by	ItInt	LItem	Vendor	Language	PayT
400	9400000762	1000	F	ZSCM			9	12/11/2013	EDDINGAN	10	10	0000100624	E	AE38
400	9400000825	1000	F	ZSCM			9	12/16/2013	EDDINGAN	10	10	0000056025	E	AE20
400	9400000954	1000	F	ZSCM			9	01/02/2014	EDDINGAN	10	10	0000076033	E	AN1G
400	9400001141	1000	F	ZSCM			9	01/14/2014	EDDINGAN	10	10	0000081770	E	AN1P
400	9400002005	1000	F	ZSCM			9	03/17/2014	EDDINGAN	10	20	0000100624	E	AE38
400	9400002006	1000	F	ZSCM			9	03/17/2014	EDDINGAN	10	20	0000100624	E	AE38
400	9400002023	1000	F	ZSCM			9	03/18/2014	EDDINGAN	10	10	0000100624	E	AE38
400	9400002461	1000	F	ZSCM			9	04/17/2014	EDDINGAN	10	10	0000070508	E	AE3C
400	9400002501	1000	F	ZSCM			9	04/21/2014	EDDINGAN	10	10	0000100624	E	AE38
400	9400002549	1000	F	ZSCM			9	04/22/2014	EDDINGAN	10	10	0000070508	E	AN1P

Figure 10: Data Browser Table EKKO Select Entries 10

Step 14: In SRM page “se16” table EKET, enter the purchase orders.

Step 15: Export the Scheduled Quantity and the Delivered Quantity to excel and calculate the difference between scheduled quantity (PO quantity) and the delivered quantity (G.R/ confirmed quantity). The POs, which has the difference in ‘Open quantity’ will be taken into consideration for shopping cart transfer ownership process.

Data Browser: Table EKET Select Entries 12

Cl.	Purch.Doc.	Item	Sched.	Deliv. Date	StatDelD	C	Scheduled Qty	Qty Delivered	Issued Quantity	Time
400	9400000762	10	1	12/09/2013	12/09/2013	1	347,050.000	320,322.36...	0.000	00:00:00
400	9400000825	10	1	12/18/2013	12/18/2013	1	3,700.000	3,700.000	0.000	00:00:00
400	9400000954	10	1	01/06/2014	01/06/2014	1	3,323.000	3,272.340	0.000	00:00:00
400	9400001141	10	1	03/31/2014	03/31/2014	1	11,696.000	11,696.000	0.000	00:00:00
400	9400002005	10	1	03/17/2014	03/17/2014	1	1.000	3.000	0.000	00:00:00
400	9400002005	20	1	03/17/2014	03/17/2014	1	1.000	1.000	0.000	00:00:00
400	9400002006	10	1	03/17/2014	03/17/2014	1	1.000	1.000	0.000	00:00:00
400	9400002006	20	1	03/17/2014	03/17/2014	1	1.000	1.000	0.000	00:00:00
400	9400002023	10	1	03/17/2014	03/17/2014	1	1.000	1.000	0.000	00:00:00
400	9400002461	10	1	06/30/2014	06/30/2014	1	350,529.000	0.000	0.000	00:00:00
400	9400002501	10	1	09/30/2014	09/30/2014	1	240,551.000	240,551.00...	0.000	00:00:00
400	9400002549	10	1	09/30/2014	09/30/2014	1	1,288,900.000	276,058.82...	0.000	00:00:00

Figure 11: Data Browser Table EKET Select Entries 12

LOOKUP								=F2-G2
	A	B	C	D	E	F	G	H
1	Cl.	Purch.Doc.	Item	Deliv. Date	StatDelID	Scheduled Qty	Qty Delivered	Open PO qty
2	400	9400000762	00010	12/09/2013	12/09/2013	347,050.000	320,322.360	=F2-G2
3	400	9400000825	00010	12/18/2013	12/18/2013	3,700.000	3,700.000	
4	400	9400000954	00010	01/06/2014	01/06/2014	3,323.000	3,272.340	
5	400	9400001141	00010	03/31/2014	03/31/2014	11,696.000	11,696.000	
6	400	9400002005	00010	03/17/2014	03/17/2014	1.000	3.000	
7	400	9400002005	00020	03/17/2014	03/17/2014	1.000	1.000	
8	400	9400002006	00010	03/17/2014	03/17/2014	1.000	1.000	
9	400	9400002006	00020	03/17/2014	03/17/2014	1.000	1.000	
10	400	9400002023	00010	03/17/2014	03/17/2014	1.000	1.000	
11	400	9400002461	00010	06/30/2014	06/30/2014	350,529.000	0.000	
12	400	9400002501	00010	09/30/2014	09/30/2014	240,551.000	240,551.000	
13	400	9400002549	00010	09/30/2014	09/30/2014	1,288,900.000	276,058.820	

Figure 12: Purchasing Document Table (1)

Step 16: Rows highlighted in red, as shown below, have to be taken into consideration for shopping cart transfer ownership processes.

A	B	C	D	E	F	G	H
Cl.	Purch.Doc.	Item	Deliv. Date	StatDelID	Scheduled Qty	Qty Delivered	Open PO qty
400	9400000762	00010	12/09/2013	12/09/2013	347,050.000	320,322.360	26,727.640
400	9400000825	00010	12/18/2013	12/18/2013	3,700.000	3,700.000	0.000
400	9400000954	00010	01/06/2014	01/06/2014	3,323.000	3,272.340	50.660
400	9400001141	00010	03/31/2014	03/31/2014	11,696.000	11,696.000	0.000
400	9400002005	00020	03/17/2014	03/17/2014	1.000	1.000	0.000
400	9400002006	00010	03/17/2014	03/17/2014	1.000	1.000	0.000
400	9400002006	00020	03/17/2014	03/17/2014	1.000	1.000	0.000
400	9400002023	00010	03/17/2014	03/17/2014	1.000	1.000	0.000
400	9400002461	00010	06/30/2014	06/30/2014	350,529.000	0.000	350,529.000
400	9400002501	00010	09/30/2014	09/30/2014	240,551.000	240,551.000	0.000
400	9400002549	00010	09/30/2014	09/30/2014	1,288,900.000	276,058.820	1,012,841.180

Figure 13: Purchasing Document Table (2)

Step 17: Multiple purchase orders can be entered into the t-code: ZSRM_APPROVALCOMP (COMPLIANCE REPORT). The shopping cart Creation Date and Company Code appears as output. See Figure 15.

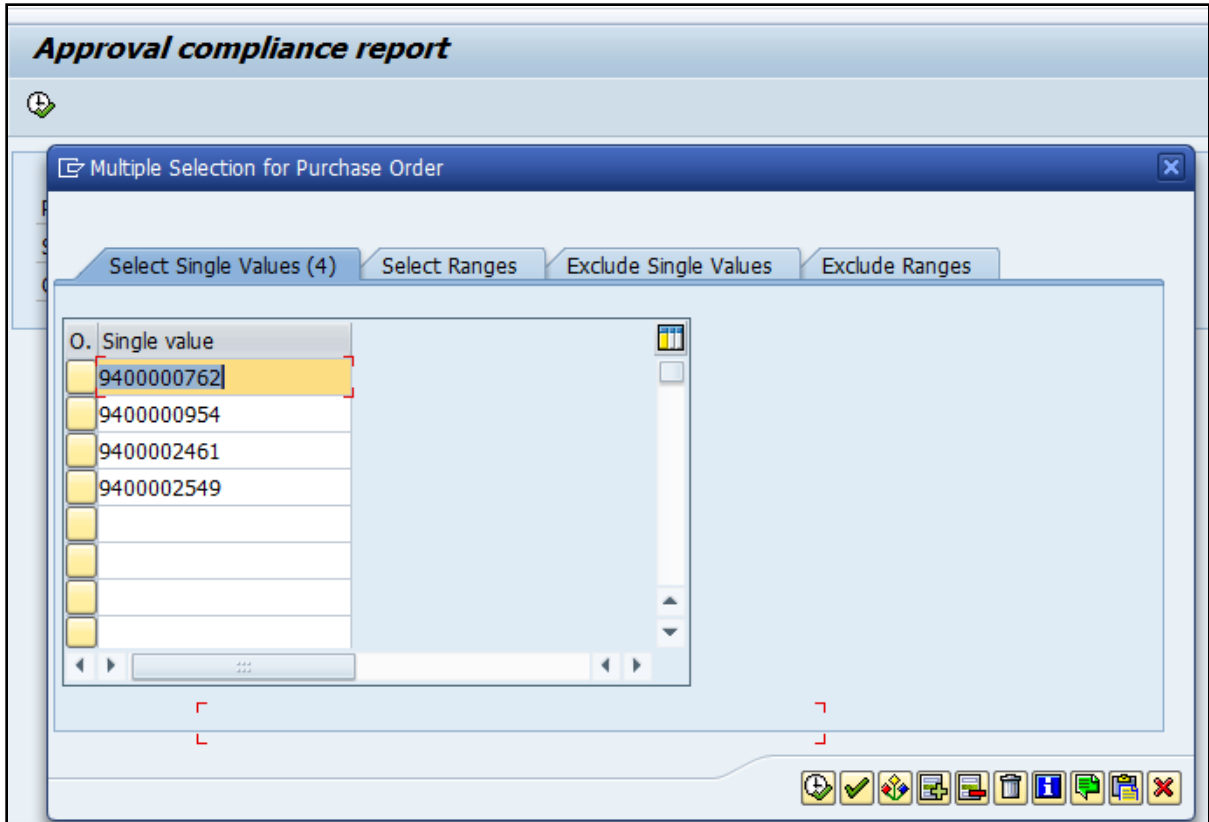


Figure 14: Select Single Values (4)

Approval compliance report


PO#	BACKENDSYS	SC#	Created By	BUYONBEHAF	Creation date	Description	COMP CODE
94000007...	PRDCLNT400	1000008743	EDDINGAN	EDDINGAN	12/09/2013	EDDINGAN 12/09/2013 13:40	1000
94000009...	PRDCLNT400	1000008746	EDDINGAN	EDDINGAN	12/09/2013	Keno BzzAgent Skintimate coupon Printing	1000
94000024...	PRDCLNT400	1000023363	EDDINGAN	EDDINGAN	04/16/2014	Women's 16-24 Cross Brand Media Buy	1000
94000025...	PRDCLNT400	1000023700	EDDINGAN	EDDINGAN	04/21/2014	Skintimate 2014 Digital Media Buy	1000

Figure 15: Approval Compliance Report Purchase Order and Creation Date

- Step 18: Open t-code ZMM_CHANGE_OWNERSHIP and begin transferring the shopping cart ownerships one-at-a-time.
- Step 19: Enter the original shopping cart User ID in Shopping Cart Owner ID field and the person to who the ownership is to be transferred in the 'Team Substitute ID' field.
- Step 20: Enter the company code in SC Creation Date. Enter a range from 1 or 2 days prior to the SC Creation Date and 1 or 2 days after the creation date. Select ALL in the Item Status drop down. Select the clock with the green check mark in the upper right-hand-corner.

Figure 16: Shopping Cart Ownership Change (1)

Step 21: System will display the shopping cart ownership number which is to be transferred.

Step 22: Select the checkbox and click 

SC number	Owner	Creation Date
<input checked="" type="checkbox"/> 1000023700	EDDINGAN	04/21/2014

Figure 17: Select Team Shopping Cart

After the checkbox is selected you will receive the below notification that the Substitute is created and the Purchase Order is updated.



Figure 18: Shopping Cart Ownership Change (2)

Step 23: Inform the concerned user to check the shopping cart in the Team Cart tab and create the confirmation.

2. Granting Additional Access via Attributes (PPOMA_BBP)

Step 24: Use transaction PPOMA_BBP in SRM to add or modify access for a SRM user. This document will show you how to add or modify the user’s access to ECC systems, locations, product categories, company codes, SRM doc types, and account assignment categories. Initial PPOMA_BBP screen will look like this:

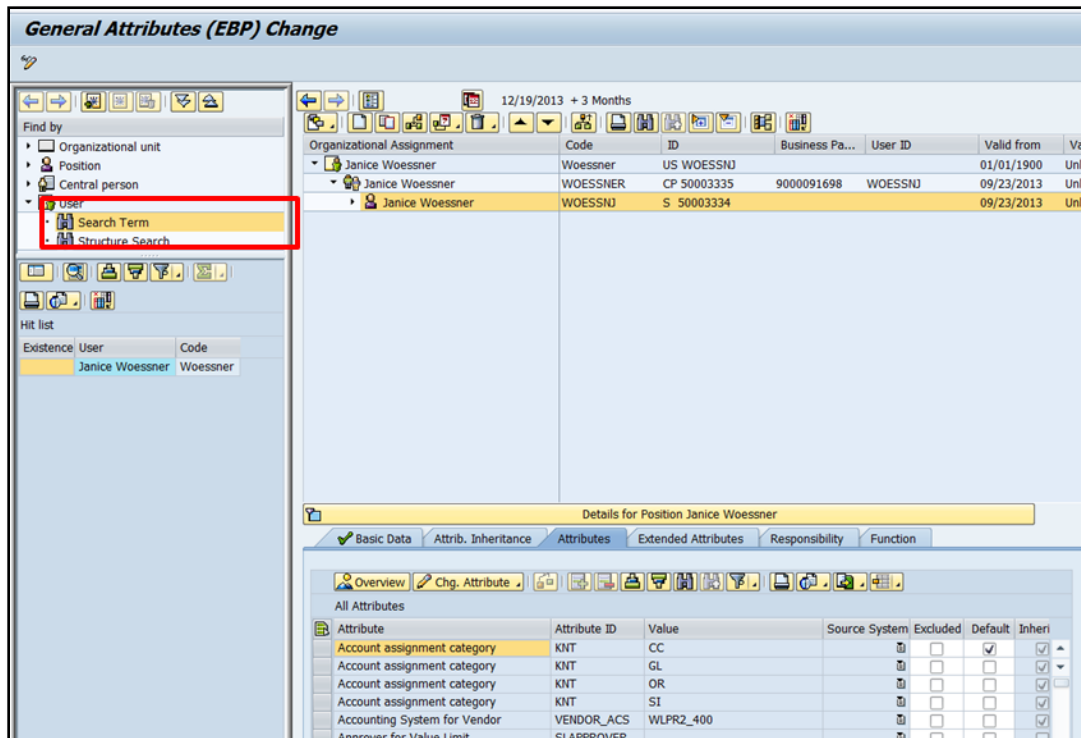


Figure 19: General Attributes (EBP) Change

Step 25: First, locate the user. Select User and enter the user name.

Step 26: In the Search Term (left-hand-side of screen), enter the first few letters of user's last name and select the Find button.

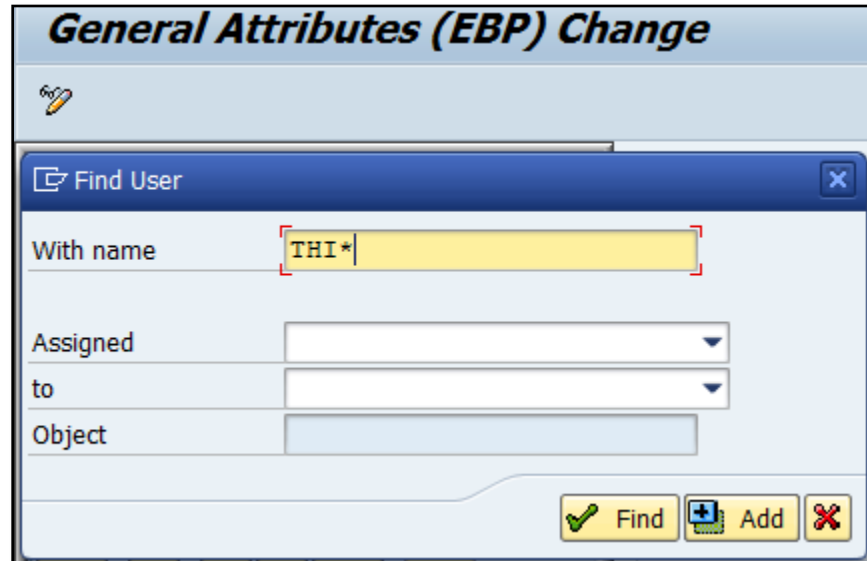


Figure 20: General attributes (EBP) Change Find User (1)

Step 27: Select the user name from the list that appears, as shown below, on the left-hand-side of the screen by double clicking on the user name.

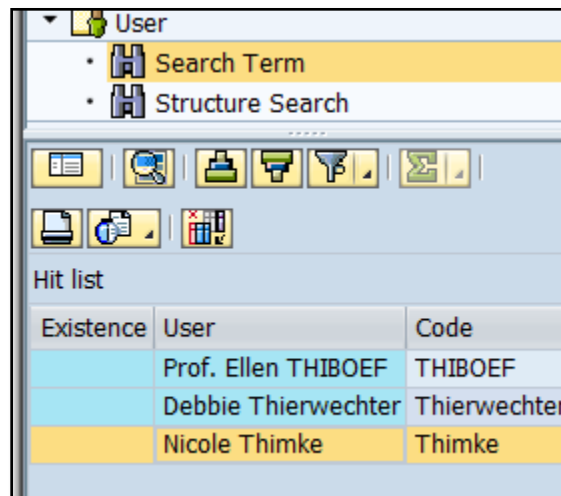


Figure 21: Search term

Step 28: Once you double click on the user's name, the following screen will appear (see figure 22).

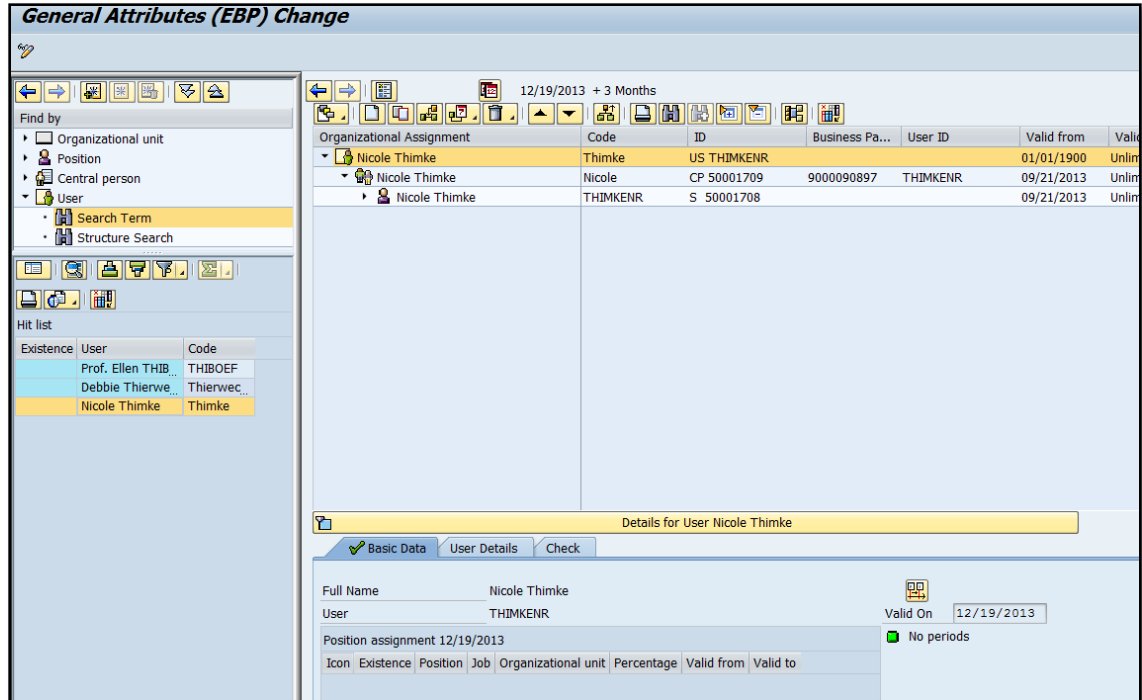


Figure 22: General attributes (EBP) Change (3)

Once the user's record has been accessed you will need to maintain additional access.

Step 29: Double click on the person's name beside the people icon.

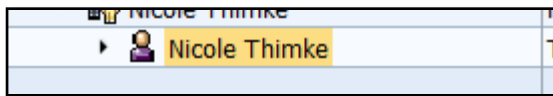


Figure 23: Users Record

The user's details will now be displayed in various tabs at the bottom section of the screen.

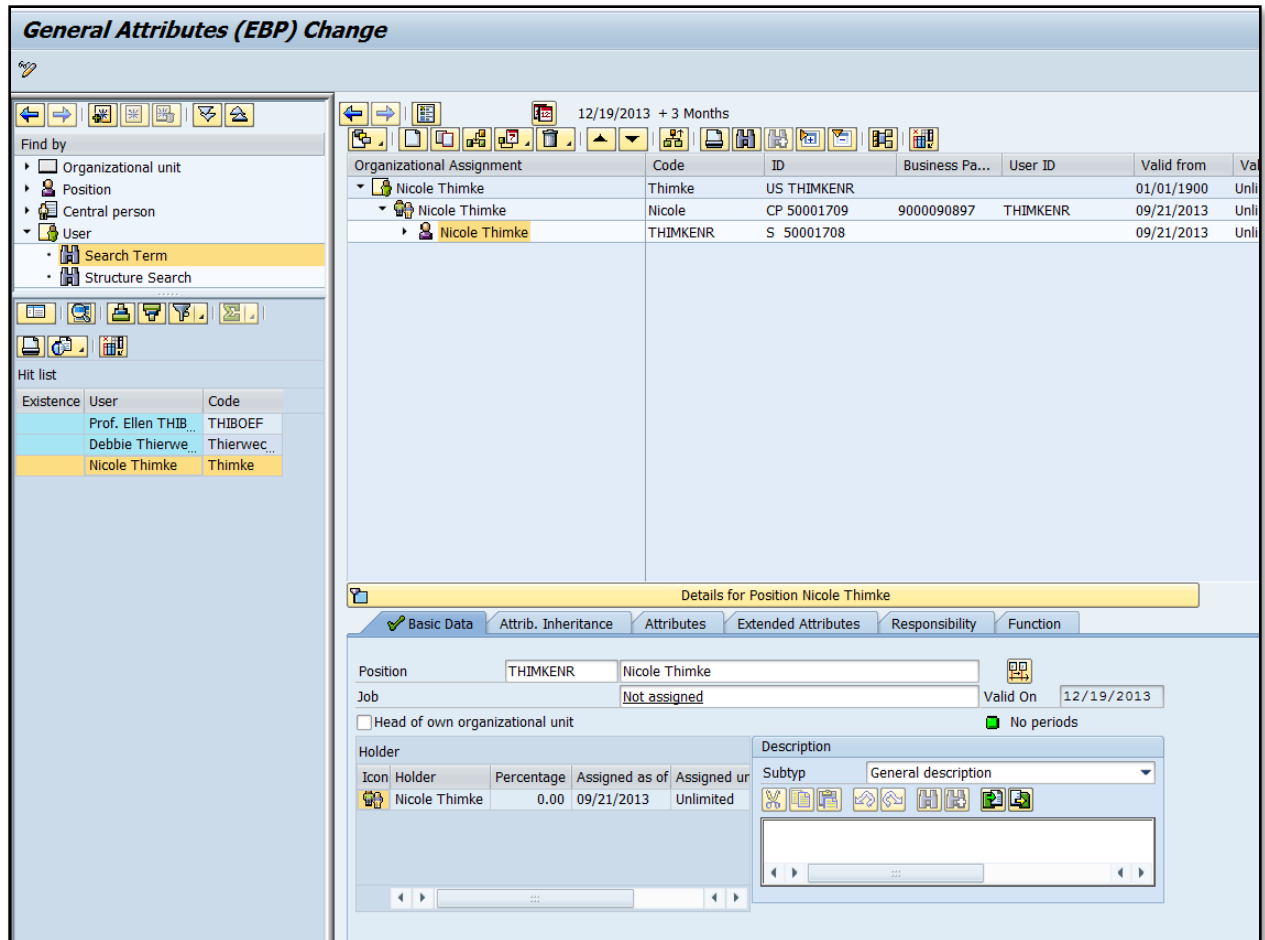


Figure 24: General Attributes (EBP) Change (4)

- Step 30: Select the “Extended Attributes” tab, additional locations and product categories are added here.
- Step 31: Select the Locations button in the upper right-hand-corner and enter the plant and system to add and modify locations.
- Step 32: Select Enter.

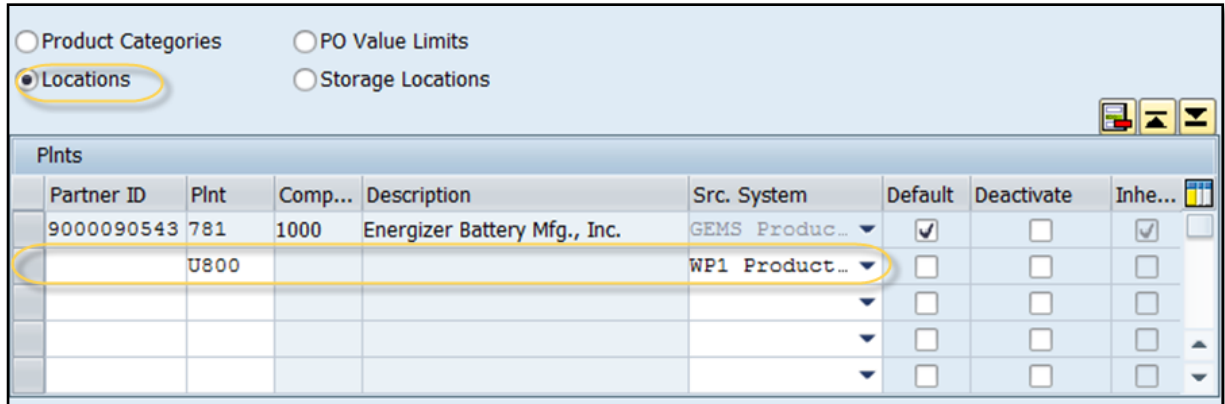


Figure 25: Select Extended Attributes Tab

Adding/Modifying Product Categories

Step 33: Select the Product Categories button to access the Product Categories screen. For new product categories, enter product category (either * or particular categories).

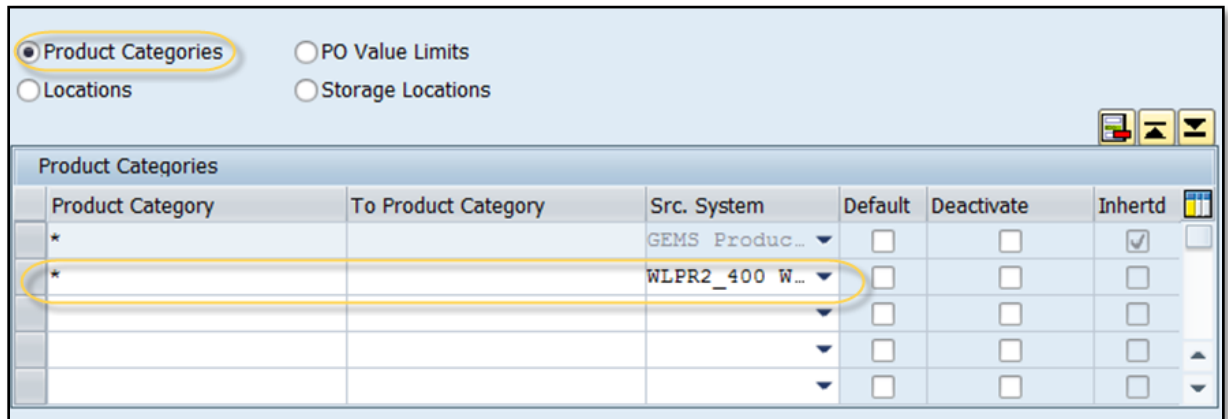


Figure 26: Adding Modifying Product Categories

Step 34: Check that the user has access in the correct company codes. You don't always need to add new company codes when you add locations. New company codes might need to be added if the system is new to the user, or the user needs a location added with a different company code.

Adding/Modifying Company Codes

Step 35: Select the Attributes tab and select the Chg. Attribute icon. A list of items, which can be changed, will appear.

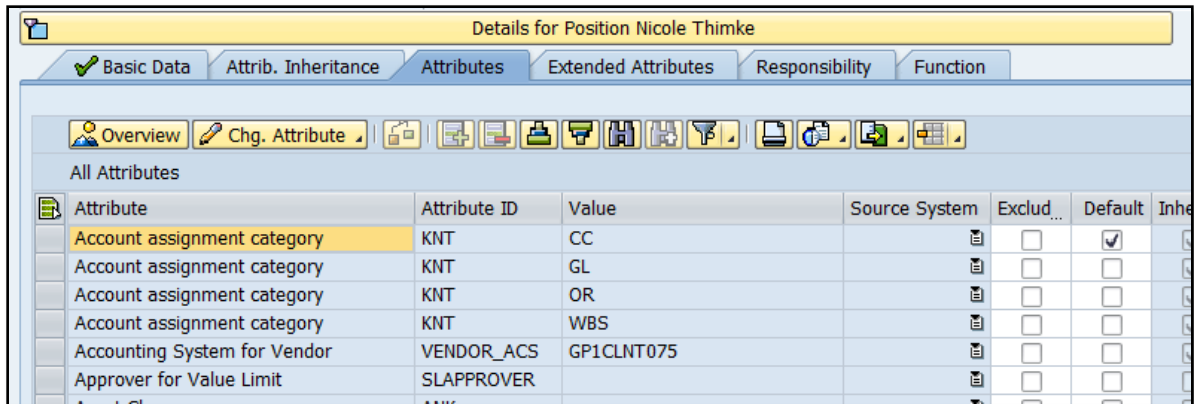


Figure 27: Details for Position

Step 36: Select company code from the list. Select the Insert Line icon (shown in the figure below). This will insert a line which can be populated with the new company code information.

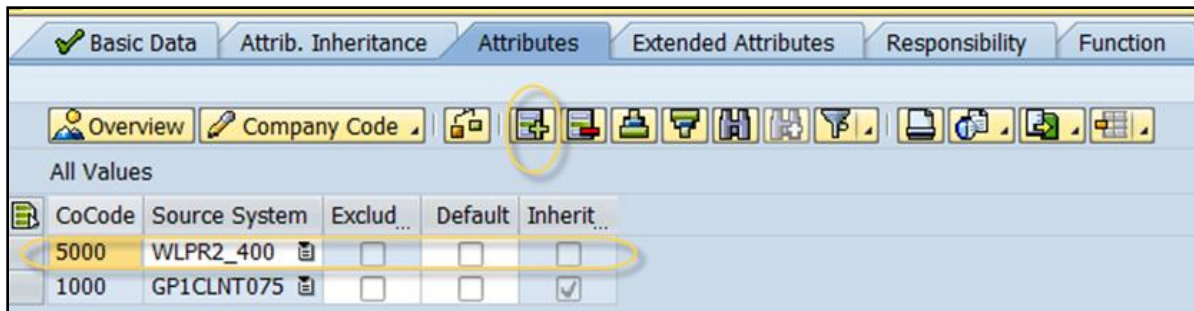


Figure 28: Insert Line Icon

Step 37: Ensure the user has access to all the SRM doc types needed in each system.

Adding/Modifying SRM Doc types

Step 38: Select the Chg. Attribute icon. It now says Company Code.

Step 39: To get your drop down list select Document Type in R/3 System.

Step 40: Select the Insert Line icon twice and enter the types of documents needed.

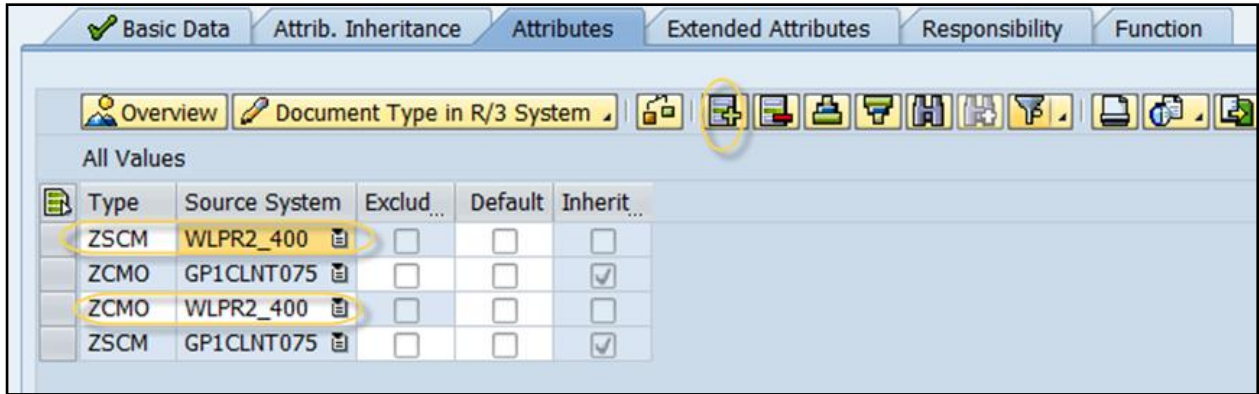


Figure 29: Adding/Modifying SRM Doc types

This page allows the user to modify account assignment categories that are supposed to be available, but not listed.

Adding/Modifying Account Assignment Category (If required)

Step 41: Select the Chg. Attribute icon. Select the Account Assignment Category button. This will allow you to add additional categories as needed.

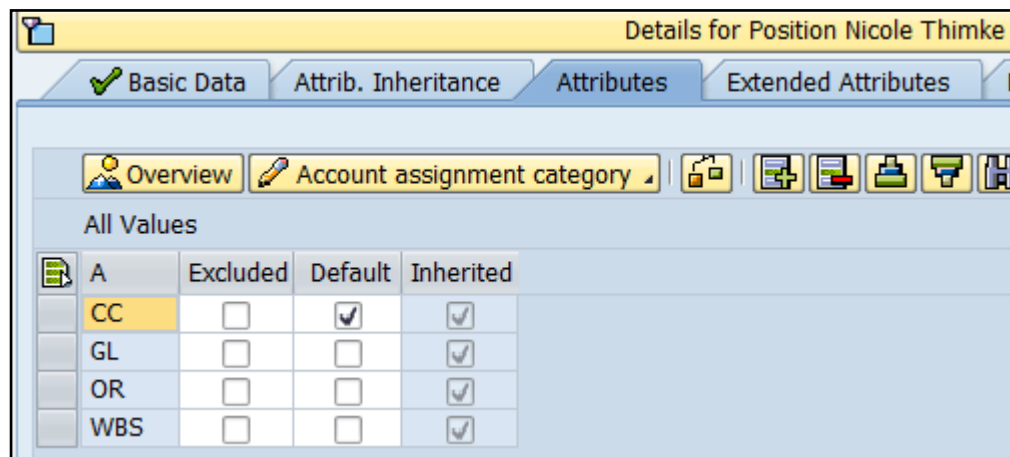


Figure 30: Details for Position overview and Account Assignment Category

Step 42: Select Save to record the changes for the SRM user.

3. Transferring Vendor from ECC to SRM

Step 43: Use the transaction code BBPGETVD and enter the data shown below. Select the Start Transfer button.

- System: Backend system being replicated from
- Supplier: Vendor number from the backend system
- Purchasing Organization: Appropriate purchasing organization for the vendor from which to replicate

- Object ID: 50000645

Transfer Supplier Master Records

System: PRDCLNT400

Limit Supplier Selection

Supplier: From 103839 To

Purchasing Organization: From po01 To

Transfer Purely Credit-Side Supplier as Invoicing Party:

Without Reference to Backend Purchasing Org.:

Transfer Information Number (LFA1-KRAUS) from Dun & Bradstreet:

Take Uniform Resource Location (LFA1-LFURL) as E-Mail:

Address Comparison to Identify Duplicates:

Only Transfer Suppliers for the Following Roles:

Organizational Object for Supplier

Object ID: 50000645

Internal Number Assignment Only

Only Transfer R/3 Numbers

If R/3 Number Assignment is not Possible: Internal Number Assignmnt

Start Transfer Cancel

Figure 31: Transfer Supplier Master Records

4. Forwarding Work Items to Other Users

To forward work items for other users you will use a two-step process.

Step 44: Use transaction SWI6 and enter data shown below:

- BO BOR Object Type
- Bus Type – BUS2121
- Key = SC number
- Selection Variant (all instances)
- Selection Period (all)

Display Workflows: Select an Object

Object Type Category: BO BOR Object Type

Object Type: BUS2121 EC Requirement Covera...

Key: 1000050415

Selection variant: 0 All Instances

Task: []

Task group: []

Component: []

Selection Period: 005 All

Buttons: Enter Object Key, Enter 'BUS2121', Enter object key as SC #, Enter 'All instances', Enter 'All'

Figure 32: Display Workflows: Select an Object

Step 45: Once the workflow is displayed, select the Display Workflow button.

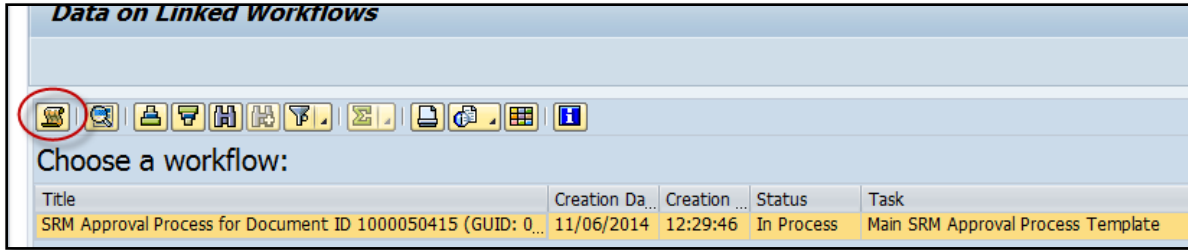


Figure 33: Data on Linked Workflows

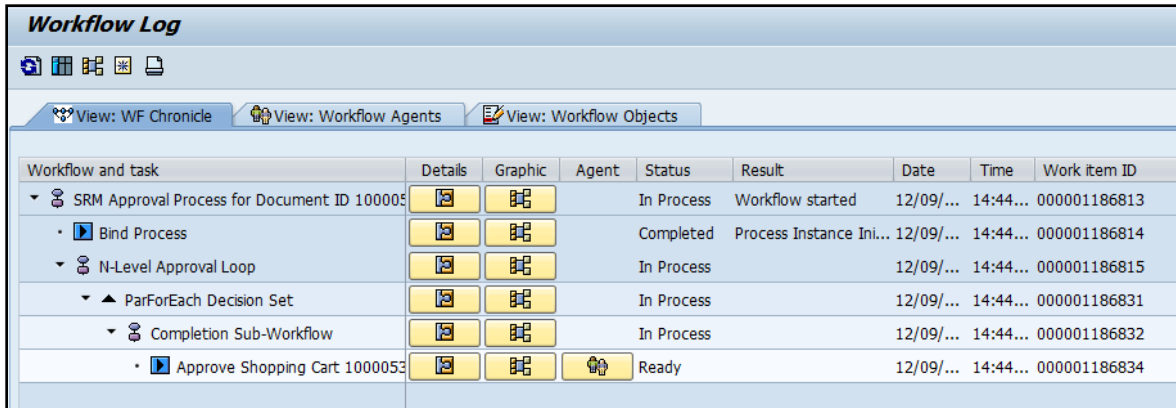


Figure 34: Workflow Log


Step 46: If the Work Item ID is not displayed, go to Extras -> Show IDs.

Using the Work Item ID


Step 47: Use the transaction SWIA to enter the Work Item ID in the Identification field and select the "Clock with Green Arrow" to execute.


Process Work Item As Administrator


Selection Using Work Item ID


Identification to 


Selection Using Work Item Properties


Type to 

Status to 

Priority to 


Deadline Status to 

Task to 

Task Group 

Top-Level Work Items Only

Selection Using Time Period

Creation Date to 

Creation Time to

Output Options (+Version, +Administrator)

Switch On

Figure 35: Process Work Items as Administrator

Step 48: On the next screen, select the Work Item ID and then select the Forward Icon (see figure 36).

Process Work Item As Administrator (1 Entry)

Without Check Replace Manually Complete Manually

ID	Status	Workflow	Work Item Type	Task	CreateDate	Create...	Work item text	C	B	Priority
1186834	READY	1186832	Dialog Step	TS40007953	12/09/2014	14:44:16	Approve Shopping Cart 1000053968 with Value 514.00 USD	<input type="checkbox"/>	5	Medium



Figure 36: Process Work Item as Administrator (1 Entry)

Step 49: In the popup, enter the User ID to which the work item should be forwarded.

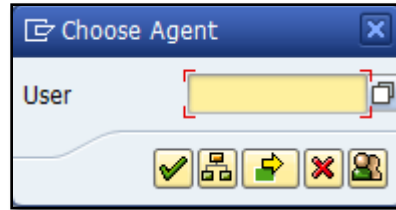


Figure 37: Choose Agent

5. Common Error Handling Procedures
6. Incorrect Shopping Cart Status

Step 50: Run transactions CLEAN_REQREQ_UP and BBP_GET_STATUS_2

7. Shopping Cart Errors
8. Vendor Lacking Terms or Blocked for Procurement

It is possible for shopping carts to be created with vendors that lack payment terms or have been blocked for procurement after the vendor has already been assigned in the SC. In both cases, the vendors need to be updated to successfully process the SC. The alternative is to have the user create a new SC with presumably a more appropriate vendor.

9. Approver Errors
10. Resolving Buyer Approver Assignment Issue

If you find a 'Z_STRATEGY_APPROVER' error in the approver process overview tab in the shopping cart, please do the below steps to correct the error.

Step 51: Open the shopping cart and get the product category and plant from the Item Data.

Step 52: The plant number can be obtained from table: BBP_LOCMAP

Step 53: Go to SE16 table: ZMM_PUR_DETERMINE

Step 54: Check: Logical System, Plant and Category ID to verify if the User ID is missing

Data Browser: Table ZMM_PUR_DETERMINE: Selection Screen

Number of Entries

Logical System	<input type="text"/>	to	<input type="text"/>	<input type="button" value="→"/>
Plant	<input type="text"/>	to	<input type="text"/>	<input type="button" value="→"/>
Category ID	<input type="text"/>	to	<input type="text"/>	<input type="button" value="→"/>
User Name	<input type="text"/>	to	<input type="text"/>	<input type="button" value="→"/>
Width of Output List	<input type="text" value="250"/>			
Maximum No. of Hits	<input type="text" value="200"/>			

Figure 38: Data Browser: Table ZMM_PUR_DETERMINE: Selection Screen

Step 55: If User ID is missing, Go to BBP_PD→get shopping cart Workitem- ID

Step 56: Go to: SWIA →Enter Workitem ID→highlight the work item→Restart after error

```

BBP  0100  USD  USD
Workflow Item:
Workitem-ID  000001033313
Task         WS40000014
Text         SRM Approval Process for Document ID 10000
Status       ERROR
Statustext
Date         10/17/2014
Time         10:07:41
No Workflow Item Found

Versions:
GUID                Type No.    Closed    Ch
005056B85A451ED495AFC1EC50AEC6DD  10

Messages:
Object was not Checked
-> Check Again

Change Document:
Change document has not been read
-> Read Change Document (sorted by time)
-> Read Change Document (sorted by table)
    
```

Figure 39: Workitem ID

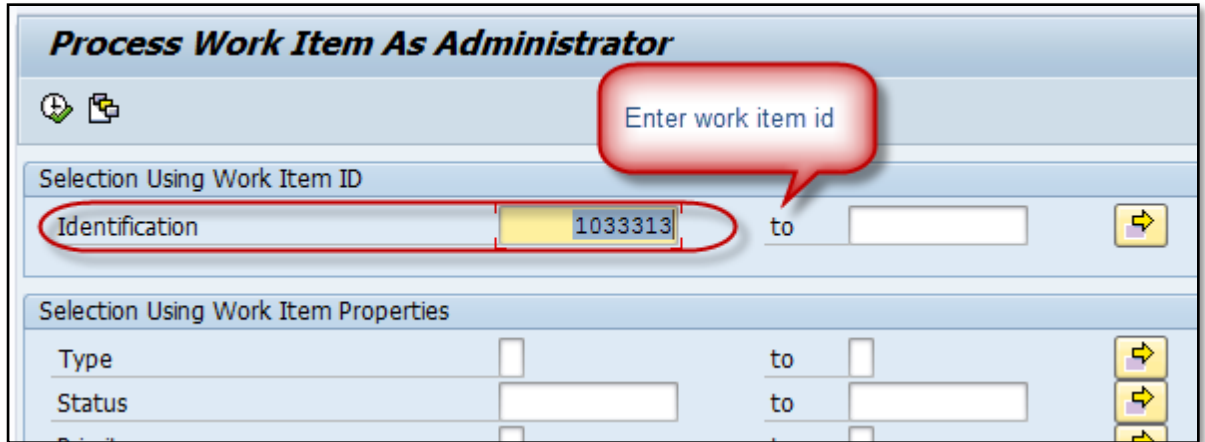


Figure 40: Process Work Item as administrator

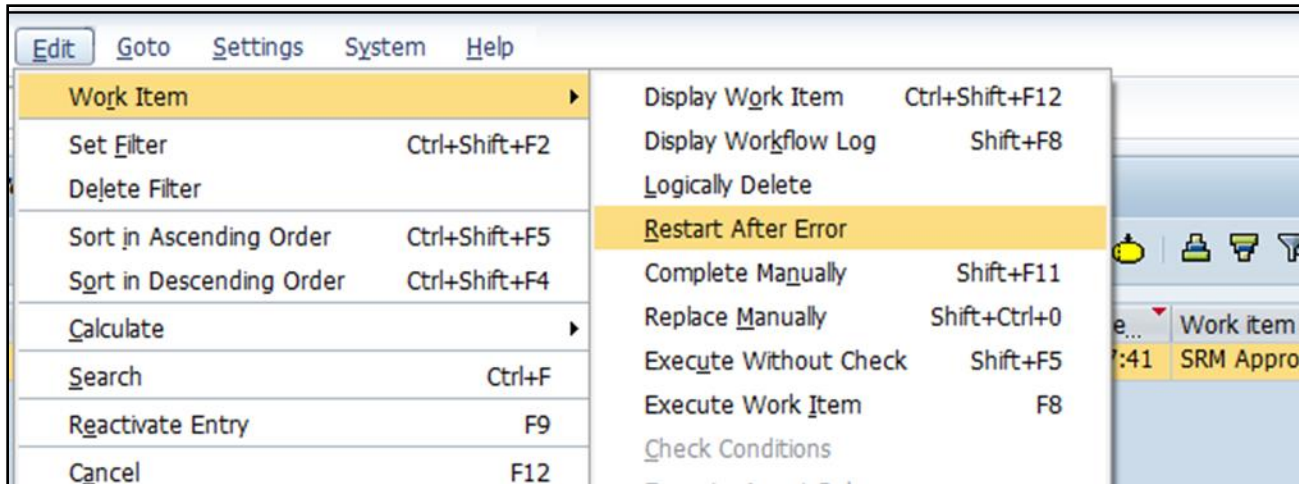


Figure 41: Restart after Error

Step 57: To verify the error has been corrected and the buyer is determined, select the refresh button.