

Introduction:

The purpose of this Job Aid is to guide staff with the roles FM.07 (Certifying Officer) and SD.04 (Services Delivery Releaser) through the process of approving, or rejecting, Service Orders that have been submitted to them by virtue of their role and mapping.

The approval process is the same for both but the circumstances in which they will need to perform the approval, and what they are approving, is different. The FM.07 Certifying Officer (FM Earmarked Funds Document Certifier) role will be located within the service recipient and be mapped to approve service orders that contain planned charges against a specific cost collector, these can be one of a Cost Centre, WBS Element or Internal Order. Whereas, the SD.04 Services Delivery Releaser will be located within the service provider, mapped to the appropriate Plant and Planner Group, and will approve and release service orders that are not budget relevant, hence do not involve cost recovery.

A budget relevant Service Order is one that has services that are charged against a client's budget and requires their approval. A non-budget relevant Service Order is not charged against a client's budget and in most cases would be statistical so they are approved within the service provider from an operational perspective only.

The steps involved are similar for both roles and sets of circumstances so the guidance provided herein is relevant to both. Any differences will be indicated.

When the SD.03 Services Delivery Planner has created either a ZM01 or ZM04 type Service Order, set it to Awaiting Approval status and saved it, an email is automatically sent to the Certifying Officer, FM.07, for budget relevant service orders and Services Delivery Releaser, SD.04 for non-budget relevant service orders requesting their approval. In the email, the following information will be provided and it will appear as per the screenshot below:

- The Service Order Number
- The Description of the Service Order (as input by the SD.03)
- Provisioning Cost Center
- The Umoja name of the person who created the Service Order

It should be noted that all staff mapped to the FM.07 role for the cost collector (Cost Centre/WBS Element/Internal Order) entered in the Service Order will receive this message. Also, all SD.04s for the Plant and Planner Group used will receive the email for non-budget relevant Service Orders. The same applies to automatic emails generated as detailed later in this Job Aid, on Reject or Release, all mapped to the relevant roles will receive the emails.

Please review Service Order No. 000010004783

Created TSEGA KELETA

Dear Approver,

The Service Order to which this message refers has been created and requires your action. Please log in to the system to review the service order and indicate your decision. To Approve, select the status "APPR - Order Approved", or to Reject, select the status "REJT - Order Rejected".

To communicate any information to the SD Planner, including the reason for rejection if rejected, you should use the Notification that is embedded in the Service Order.

Service Order details are:
Service Order Number: 000010004783
Service Order Description: UN Habitat CD Unit,RCB Branch CERT
Provisioning Cost Center: 10254
Service Order Creator: TKELETA

Regards,
SAP Production System

This is an auto generated message: please do not reply to the e-mail

Trigger

Perform this procedure when you need to approve a Service Order.

Prerequisites

Service Order is in Awaiting Approval status

Transaction Code

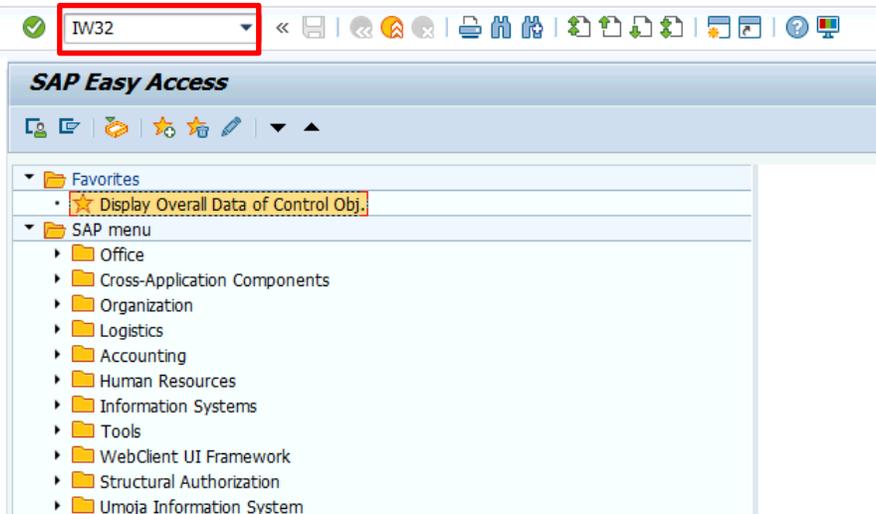
IW32

Responsibilities

For a budget relevant service order, the FM.07 is to review the costs associated with the Service Order, validate account assignment, services (operations) and/or components to be provided are accurately reflected and in accordance with their request. The information to review for an SD.04 is similar except that for non-budget related service orders there are no costs to review.

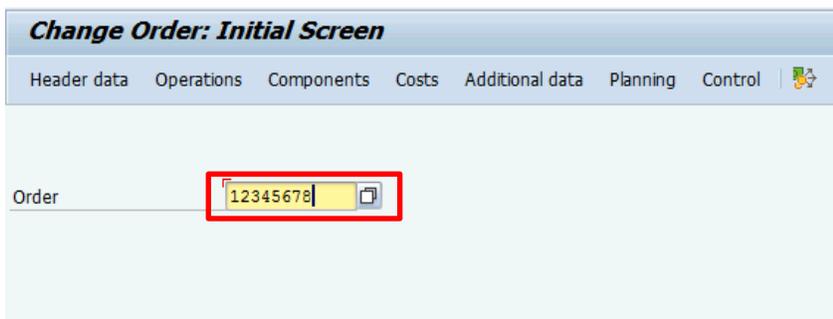
Step-by-Step Instructions

1. Enter IW32 in the Command field



2. Click the Enter icon

3. Enter the Order number (from the email) in the Order field and click enter:



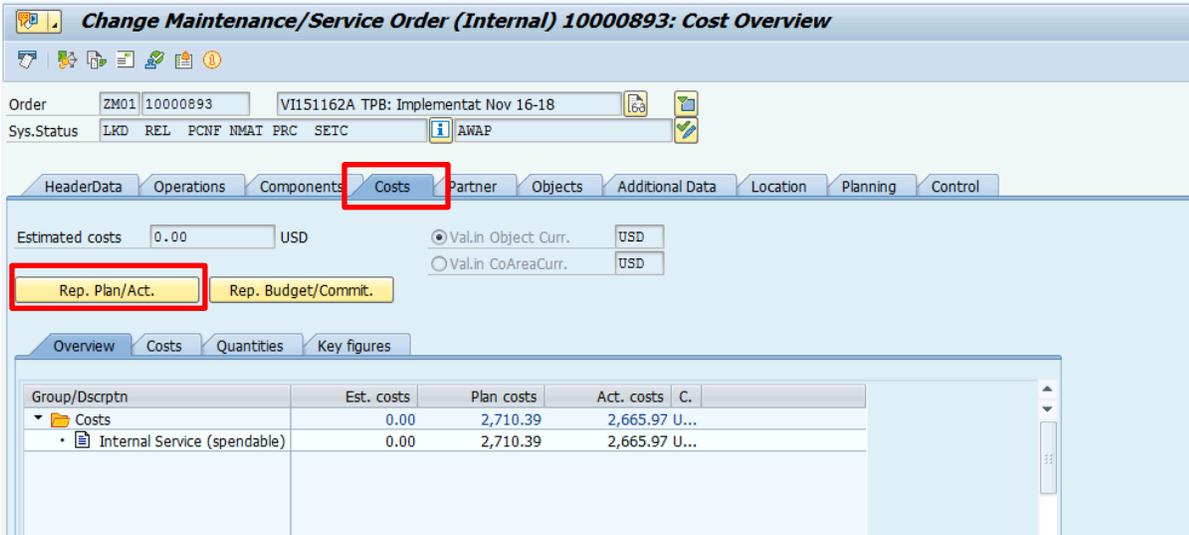
Note: For budget relevant Service Orders the User Status is AWAP (Awaiting Approval) and the System Status at this time is LKD (Locked), which means that only those mapped to FM.07 can change the order and the only change they can make is to Approve or Reject. The FM.07 cannot make any data changes to the Service Order, nor can the SD.03 or SD.04, until it is approved.

4. Click the Operations tab. Review the list of the activities/operations planned to be provided. Repeat for the Components tab if there are any.

The screenshot shows the 'Change Maintenance/Service Order (Internal) 10000893: Operation Overview' screen. The 'Operations' tab is selected and highlighted with a red box. The table below lists various activities with their respective details.

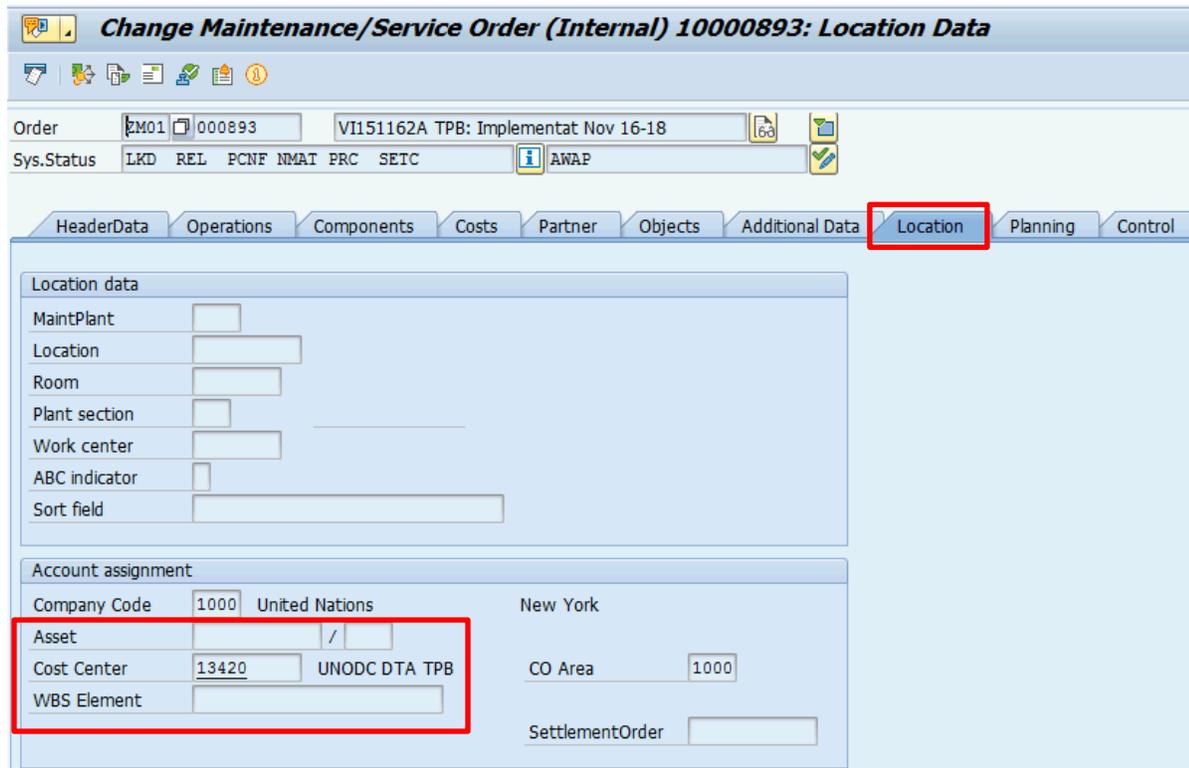
Op...	SOp	Work ctr	Plant	Co...	StTextK	S...	Operation short text	LT	Actual work	Work	Un	N...	Dur.	Un	C.Key	ActTyp	Recipient	
0010		ACM-C001	AT00	SM00			Conference officer			3.0	3.0	DAY1	3.0	DAY2	Calculate ...	RC1080		
0020		ACM-C001	AT00	SM00			Technician			3.0	3.0	DAY1	3.0	DAY2	Calculate ...	RC1571		
0030		ACM-C001	AT00	SM00			Overtime		9.300	9.3	H	1	9.3	H	2	Calculate ...	RC1103	
0040		DSS-A001	AT00	SM00			Security Services		24.200	24.2	H	1	24.2	H	2	Calculate ...	RS1097	
0050		DSS-A001	AT00	SM00			Badges		24	50	ZEA	1	50	ZEA	2	Calculate ...	RS1202	
0060		ACM-B201	AT00	SM00			USB Sticks BGB		0	1	ZEA	1	1	ZEA	2	Calculate ...	RC1516	
0070		ACM-B201	AT00	SM00			Photo Copying		2,200	2,200	ZEA	1	2,200	ZEA	2	Calculate ...	RC1574	

5. Click the Costs tab. Review the total costs of the Service Order. For a more detailed breakdown of the costs, click on the “Rep. Plan/Act.” button.

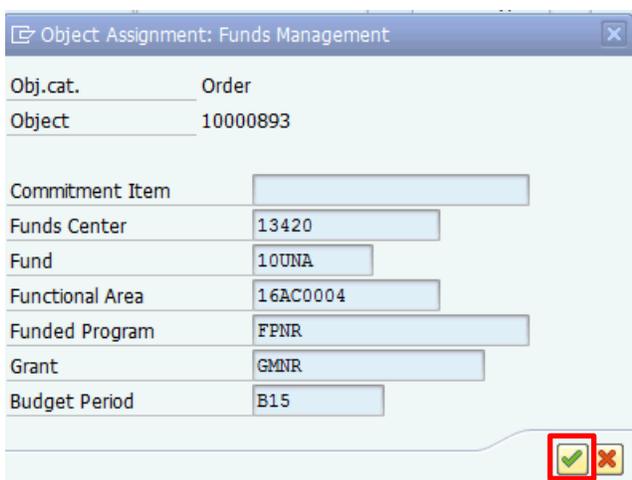
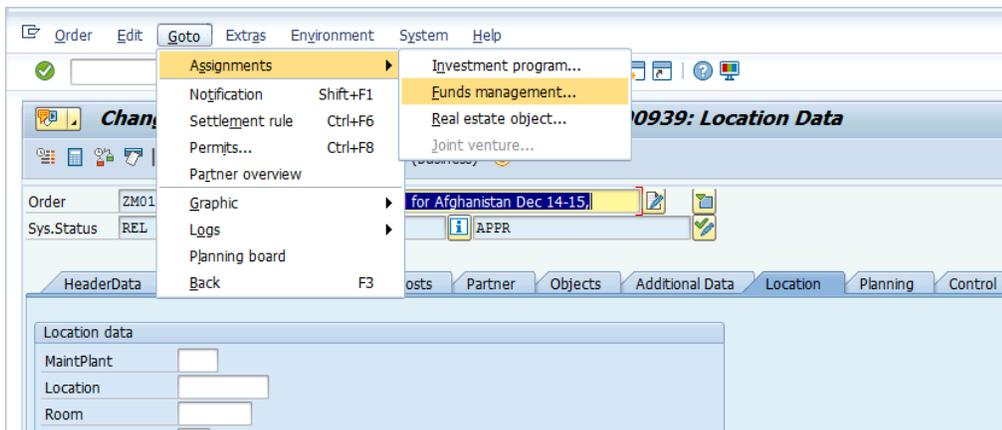


6. Click the Location tab. Review the following fields:

- Asset (if relevant)
- Cost Centre/WBS Element/Internal Order (as relevant)



7. Select the Goto > Assignments > Funds Management menu item. The “Assignment: Funds Management” screen will pop up. Review the Fund Assignment and click on the green check mark when done.



8. Click the Back icon

9. When you are satisfied that everything is in order, click the Change Status icon to change the status of the Order to Approved. You can do this from within any tab.

Change Maintenance/Service Order (Internal) 10000893: Location Data

Order ZM01 10000893 VI151162A TPB: Implementat Nov 16-18

Sys.Status LKD REL PCNF NMAT PRC SETC AWAP

HeaderData Operations Components Costs Partner Objects Additional Data **Location** Planning Control

Location data

MaintPlant
Location
Room
Plant section
Work center
ABC indicator
Sort field

Account assignment

Company Code 1000 United Nations New York
Asset /
Cost Center 13420 UNODC DTA TPB CO Area 1000
WBS Element
SettlementOrder

10. To approve, select “03 APPR Order Approved” radio button and click on the green check mark located on the bottom right side

Set User Status

Status with status no.

01 HELD Order Held

02 AWAP Awaiting Approval

03 APPR Order Approved

04 REJT Order Rejected

Status w/o status no.

Green check mark icon

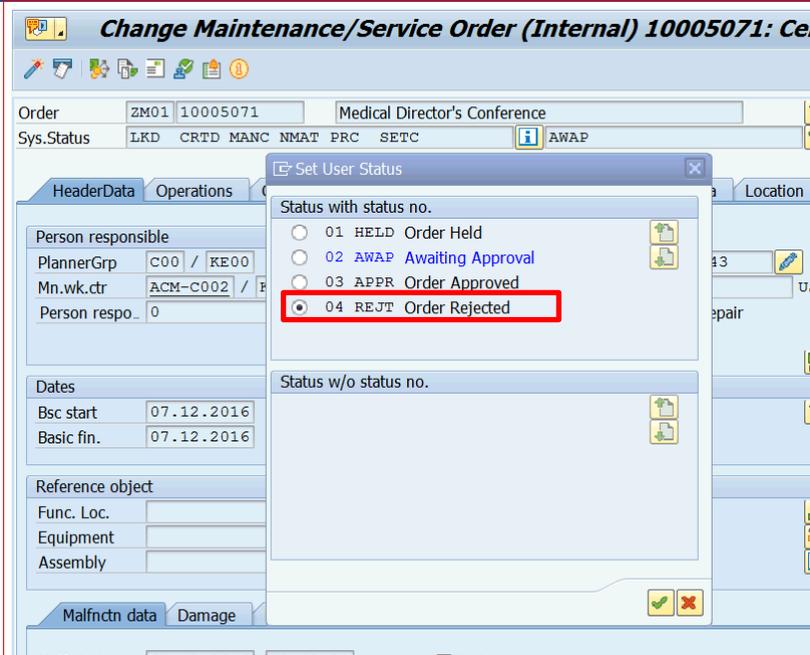
11. Click the Save button. If you do not save, the Service Order will not be approved and still locked for both SD.03 and SD.04.

12. It is important to note that in approving a budget relevant service order the FM.07 is also confirming that funds are available to cover the costs associated with it, even though budget is not consumed at this stage of the process.

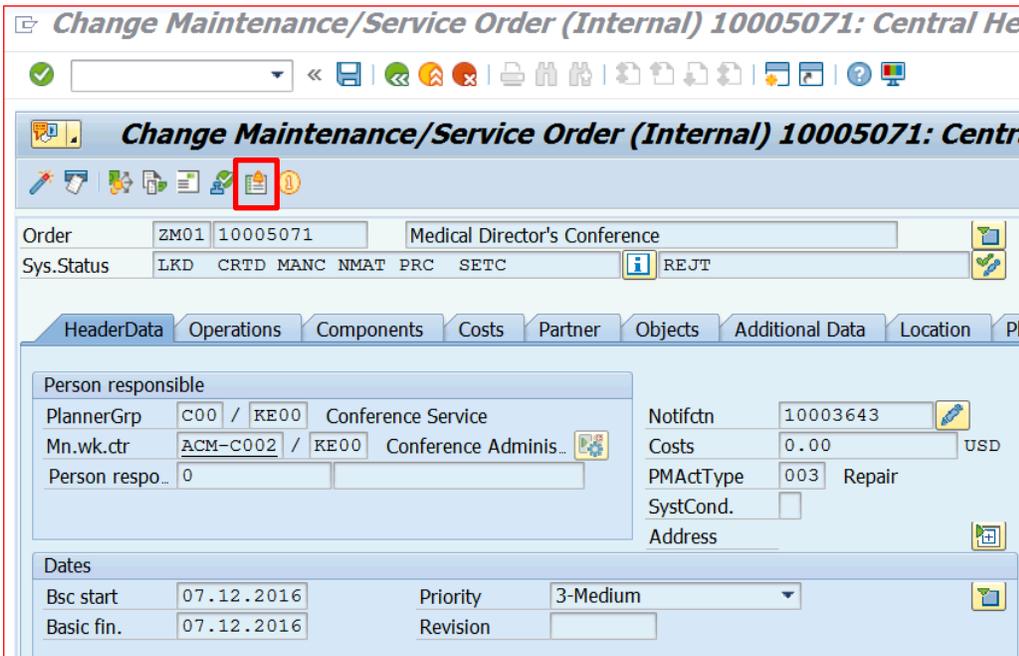
13. An email will automatically be sent to the Service Order Releaser (SD.04) advising that the Service Order is approved. They can then release the order for the work to be carried out and/or goods issued. The message received will be similar to the one received at the beginning of this process, as per below.



14. Alternatively, if for any reason you want to Reject the Service Order, follow Step 9 above but when you get the 'Set User Status' pop-up select '04 REJT Order Rejected' instead of Order Approved.



15. When you reject a Service Order you also need to enter a reason for rejection in the embedded Notification. To do this, before you save the Service Order, click on the Notification icon, indicated below, and you will get the screen shown in the second screen below. Enter text in the free text field reflecting the reason for rejection. Then click the green arrow back button. The system will record the date, time and name of entry, this information will be visible in the Service Order to anyone who opens it.



Change PM Notification: Generic Notification

Notification: 10003643 ZZ Medical Director's Conference
 Notific. Status: NOPR ORAS RQCR
 Order: 10005071

Notification

Reference object
 Functional loc.
 Equipment
 Assembly

Subject
 Coding
 Description: Medical Director's Conference

Dear Planner, I have rejected this Service Order because the services you have entered are more than we agreed. Kindly contact me to discuss. Thank you

Responsibilities
 Planner group: C00 / KE00 Conference Service
 Main WorkCtr: ACM-C002 / KE00 Conference Administrative Support
 Department resp.
 Person respons.
 Reported by: Notif.date: 01.12.2016 18:42:24

16. When the Service Order is now saved it will automatically generate the message below to the SD.03 Planner.

Please review Service Order No. 000010004783

Created TSEGA KELETA

Dear Planner,

The Service Order to which this message refers has been rejected. Please log in to the system to review the Notification that is embedded in the Service Order and take required action.

Service Order details are:
 Service Order Number: 000010004783
 Service Order Description: UN Habitat CD Unit,RCB Branch CERT
 Rejected By: TKELETA

Regards,
 SAP Production System

This is an auto generated message: please do not reply to the e-mail

17. The SD.03 Planner should then open the Service Order, review the embedded Notification and take the necessary action(s).