

# 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	3				
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 Syste This is an auto gene	em rated message: please do not reply to the e-m	nail				

# 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



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SAP Easy Access
😰 🔄 🏷 h h h / I 🔻 🔺
Favorites
<ul> <li>Display Overall Data of Control Obj.</li> <li>SAP menu</li> </ul>
• 🗖 Office
Cross-Application Components
Organization
Logistics
Accounting
Human Resources
🕨 🛅 Information Systems
+ 🧰 Tools
🕨 🛅 WebClient UI Framework
Structural Authorization
🕨 🗀 Umoja Information System

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

Order: Ini	tial Screen				
Operations	Components	Costs	Additional data	Planning	Control 🛛 😽
123	345678	1			
	Order: Init	Operations Components	Operations Components Costs	Operations Components Costs Additional data	Operations Components Costs Additional data Planning

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.

	P. Change Maintenance/Service Order (Internal) 10000893: Operation Overvi																							
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Order Sys.Status	rder 2M01 10000893 VII51162A TPB: Implementat Nov 16-18 🔂 🛅 ys.Status LKD REL PCNF NMAT PRC SEIC 🚺 AWAP																							
Head	erData 🗸 C	perati	ons	C	omponen	ts	Costs	Partner	Objects	Additional [	Data	Location	Plannir	ng Con	rol									
Op	SOp Work	ctr P	lant	Co	StTextK	s	Operation	short text			LT	Actual work		Work	Un	N	Dur.	Un	C.	Кеу		ActTyp	Recipient	l
0010	ACM-C	001 A	тоо	5M0 0			Conference	e officer					3.0	3.	DAY	1	3	. 0 DA	Y 2	Calculate	🕶	RC1080		
0020	ACM-C	001 A	тоо :	5M0 0			Technician						3.0	3.	DAY	1	3	. 0 DA	Y 2	Calculate	🕶	RC1571		
0030	ACM-C	001 A	T00 :	5M0 0			Overtime						9.300	9.	вн	1	9	.3H	2	Calculate	🕶	RC1103		
0040	DSS-A	001 A	тоо :	5M0 0			Security Se	ervices					24.200	24.	٤H	1	24	.2H	2	Calculate	🔻	RS1097		
0050	DSS-2	001 A	тоо	5M0 0			Badges						24	5	ZEA	1	1	50 ZE/	A 2	Calculate	🕶	RS1202		
0060	ACM-E	201 A	тоо	5M0 0			USB Sticks	8GB					0		ZEA	1		1 ZE	A 2	Calculate	🕶	RC1516		
0070	ACM-E	201 A	тоо :	5M0 0			Photo Cop	ying					2,200	2,20	ZEA	1	2,2	00 ZE	<b>A</b> 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.

👎 🔎 Change Maintenance	/Service Ord	ler (Internal)	) 10000893: Cos	t Overview			
7 队 🖡 🖹 🖋 🗎 🛞							
Order ZM01 10000893 V Sys.Status LKD REL PCNF NMAT PRO	151162A TPB: Impl C SEIC	ementat Nov 16-18	3 🔒 📔				
HeaderData Operations Com	oonents Costs	Partner Ob	jects Additional Data	Location Planni	ng Control		
Estimated costs 0.00 USD OVal.in Object Curr. USD Val.in CoAreaCurr. USD Val.in CoAreaCurr. USD							
Group/Dscrptn	Est. costs	Plan costs	Act. costs C.			-	
<ul> <li>Costs</li> </ul>	0.00	2,710.39	2,665.97 U				
• 🗎 Internal Service (spendable)	0.00	2,710.39	2,665.97 U			**	

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

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

👦 🕽 Change Maintenance/Service Order (Internal) 10000893: Location Data
- 🌄   👺 🕞 三 🌌 🏥 🔕
Order       MO1       O00893       VI151162A TPB: Implementat Nov 16-18       Implementation         Sys.Status       LKD       REL       PCNF       NMAT       PRC       SETC       Implementation       SetC       Implementation
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

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.

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🔄 <u>O</u> rder <u>E</u> dit	Goto Extras Enviro	onment	System <u>H</u> elp	
<b>Ø</b>	A <u>s</u> signments	•	Investment program	
	No <u>t</u> ification S	hift+F1	Eunds management	
👎 🛃 Chan	Settle <u>m</u> ent rule	Ctrl+F6	Real estate object	0939: Location Data
94 🗖 95 👼 I	Permits	Ctrl+F8	Joint venture	
	Partner overview		(Dabinobby C	
Order ZM01	<u>G</u> raphic	•	for Afghanistan Dec 14-15,	
Sys.Status REL	Logs	•	1 APPR	
	Planning board			
HeaderData	<u>B</u> ack	F3	osts Partner Objects	Additional Data Location Planning Control
Location data				
MaintPlant				
Location				
Room				

🔄 Object Assignment: Funds Management 🛛 🛛 🔀						
Obj.cat.	Order					
Object	10000893					
Commitment Item						
Commitment Item						
Funds Center	13420					
Fund	10UNA					
Functional Area	16AC0004					
Funded Program	FPNR					
Grant	GMNR					
Budget Period	B15					

# 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	e Maintenance/Service Ord	ler (Internal) 1000089	3: Location Data
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Order ZM01 1 Sys.Status LKD F	0000893 VI151162A TPB: Impl EL PCNF NMAT PRC SETC	ementat Nov 16-18	
HeaderData	Operations Components Costs	Partner Objects Additi	onal Data Location Planning Control
Location data			
MaintPlant			
Location			
Room			
Plant section			
ABC indicator			
Sort field			
	J		
Account assignmen	t		
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.	
O 01 HELD Order Held	1
O 02 AWAP Awaiting Approval	
<ul> <li>03 APPR Order Approved</li> </ul>	
O4 REJT Order Rejected	
Status w/o status no.	
	<b>L</b>
	<b>×</b>





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.

Please review Service O	Please review Service Order No. 000010004784					
Created TSEGA K	ELETA					
Dear Releaser,						
The Service Order to which this m requires your action. To Release, Reject, select the status "Reject -	The Service Order to which this message refers has been Approved and requires your action. To Release, click on the "Green Flag" or to Reject, select the status "Reject - 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: 000010004 Service Order Description: UN Hal Provisioning Cost Center: 10254 Service Order Creator: TKELETA	4784 bitat CD Unit,RCB Branch CERT					

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.



Change Mainte	enance/Service Order (Internal) 10	)005071: Cei
/ 💎 💺 🔂 🖉 😫 🔕		
Order ZM01 10005071	Medical Director's Conference	
Sys.Status LKD CRTD MANC	Ter Set Liser Status	
HeaderData Operations (		Location
Person responsible	0 01 HELD Order Held	
PlannerGrp C00 / KE00	02 AWAP Awaiting Approval     03 APPR Order Approved	13
Person respo 0	• 04 REJT Order Rejected	pair
		IN
Dates	Status w/o status no.	
Bsc start 07.12.2016		1
Basic fin. 07.12.2016	<u>.</u>	1
Reference object		
Func. Loc.		6
Equipment		[
Assembly		
Malfnctn data Damage		

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 Maintenance/Service Order (Internal) 10005071: Central He			
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Change Maintenance/Service Order	· (Internal) 10005071: Centra		
/ 💎 💱 🔂 🖬 🖉 💼 🔍			
Order ZM01 10005071 Medical Director's Confer	rence 🛅		
Sys.Status LKD CRTD MANC NMAT PRC SETC	🚺 REJT 💅		
HeaderData Operations Components Costs Partner	Objects Additional Data Location Pl		
Person responsible			
PlannerGrp C00 / KE00 Conference Service	Notifctn 10003643		
Mn.wk.ctr ACM-C002 / KE00 Conference Adminis 👫	Costs 0.00 USD		
Person respo 0	PMActType 003 Repair		
	SystCond.		
	Address 🛅		
Dates			
Bsc start 07.12.2016 Priority 3-Mediu	ım 🔹 🛅		
Basic fin. 07.12.2016 Revision			



🖻 Change PM I	Notification: Generic Notification	
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P. Change	PM Notification: Generic Notification	
🥞   🏁   🖴 🔶 Partn	ier 📑 🕞 😅 🜄 🛃	
Notification	10003643 ZZ Medical Director's Conference	
Notific. Status	NOPR ORAS	
Order	10005071	
Notification		
Reference object		
Functional loc.		
Equipment		ėС
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	<b>Þ</b> ö
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 Orde log in to the syste Service Order and	r to which this message refers has been rejected. Please m to review the Notification that is embedded in the d 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 S	ystem	
This is an auto ge	enerated 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).