

CHANGE AGENT UPDATE: FALL 2016



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Summary



In this fall edition, we have information for you on:

Project Updates:

- **P&F Update Makes Getting New Employee Network Access Faster**
- **Purchase Requisition Notification Process Makes Workflow More Visible**
- **New Cash Receipt Journal Process Makes Bank Clearing Automated, More Efficient**
- **EAM Update**

Tips & Tricks:

- **User Interface Shortcuts in SAP**
- **How to Create a T-Code Shortcut on Your Desktop**

(Yes, these are repeated from the last update; we have a number of new Change Agents and there was a request for these to be sent again.)

Miscellaneous:

- [EBS' New Logo](#)

Our next update for Winter will be issued the second week of January 2017.

+ Charlie

Project Updates

Processes & Forms Update

The New Hire Form has been revised to assist Bureau P&F Initiators in requesting computer access and account setup for new employees. This process will allow the BTS Helpdesk to set up computer user IDs without waiting for the new hire action to be entered in SAP.

The screenshot shows the 'Hire an Employee' form in SAP. The form is titled 'Hire an Employee' and includes fields for Reason Code, Pers. Number (01010939), Begin Date (09/06/2016), and Legal Name (First and Last). The Legal Name fields are highlighted with a red box. Below the form, there is a section for 'Requested Action(s) - Check all that Apply' with a radio button for 'Temporary HR 3.03'.

The Legal Name – First and Last will show in each step of the “short form”, approval steps 1 through 4. In addition, the Legal Name – First and Last will show in the “long form” presented at the 5th approval step in the New Hire section of the form.

Once the form is without error and sent on to the 2nd approval step, an e-mail is sent directly to the initiator of the form with the new SAP User ID included. You can then use the information in the email to fill in the required fields in the BTS network request form for the new employee in your Bureau.

For more detailed information and a list of all the updates made to P&F, go [[HERE](#)].

P&F Online Documentation

Online now, there is a variety of training materials, job aids, and videos for P&F available in the SAP Learning Center.

P&F Section	Print Instructions	Video Instructions
Main Page	Work Instructions	Video Links

Purchase Requisition Notification Process

SAP Inbox notifications are ineffective unless the user keeps his or her SAP Inbox open or checks regularly. Email notifications sent to Outlook will have greater visibility. Below are some common questions and answers.

When will requisitioners and approvers start to receive email notifications?

September 16th

What are the choices for email notification?

Approvers:

- 1 to 1 (one email per work item—approval awaiting review)
- 1 batch sent at midnight
- 2 batches: 1 at noon, 1 at midnight
- Opt out (designed for approvers who keep their SAP Inbox open)

Requisitioners:

- 1 to 1 (one email per work item—requisition released & 48 hour reminder)
- Opt out

What is the default email notification preference?

1 to 1

Will the default be set when email notifications go live?

Yes. There is no need to set your preference if you plan to leave it at 1 to 1.

Can notification preferences be set before September 16th?

Our goal is to have the program in the SAP production system 1-2 days prior to go-live on Sept. 16th, allowing users to set preferences before going live. A communication will be sent by EBS when the system is ready.

How do I change my notification preference?

Approvers

SAP Transaction Code: ZREQEML1

Requisitioners

SAP Transaction Code: ZREQEML2

FYI:

Requisitioners and approvers were asked to notify their change agents if they received the email communication from EBS, but don't think that they should have the role.

Consider reviewing your bureau's workflow table and reducing the number of approvers if you have more than you need. A bureau approver can use transaction SBWP to create and activate a workflow substitute if they will be out of the office. The substitute just has to have the same approver role.

New Cash Receipt Journal Process (FV50)

EBS and Treasury have worked collaboratively to develop improvements to the Cash Module (CM). The changes being implemented will increase SAP's automated clearing of Bank GL account line items, and decrease staff's manual clearing of these items. Automated clearing statistics for CM over the last year have been substandard; at a rate of 30% of all Cash / Revenue Posting (CR) Journal Entries (J/E). This project is expected to increase automated clearing of CR J/E to 70-80% while providing bureaus faster clearing of their entries.

Screen Change for All GL Users (FV50)

The GL entry screen will change to ensure the assignment field is visible; currently it appears further to the right requiring users to scroll over. We are making it visible on the initial screen so users don't forget to complete it.

The screenshot shows the SAP GL entry screen with the following details:

- Basic Data:** Document Date: 08/11/2016, Currency: USD, Posting Date: 08/12/2016, Reference: PERMITS 072516, Doc. Header Text: Permit Receipts, Document Type: CR Cash/revenue posting, Company Code: COP1 City of Portland U.S.A.
- Amount Information:** Total Dr. 5,000.00 USD, Total Cr. 5,000.00 USD.
- Table:** 2 Items (Screen Variant: COP-FV50)

Sta	Gl/L acct	Short Text	D/C	Amount in doc	Cost center	Order	WBS element	Fund	Business	Grant	Assignment
✓	111042	WF Cr Card - E	D	5,000.00							
✓	439100	Misc svc chgs	H	5,000.00	FRPR000007	9FRPR0000004		100000	FR00	NOT-RELE	8024119999

New Business Process (for Users Entering CR Journal Entries)

- Assignment field must be filled with Merchant ID number or Location ID number
- Posting date must reflect when the funds are posted to our bank account

Work Instructions:

[FV50 Work Instruction | Print Document \(PDF\)](#)

[FV50 Work Instruction | Video Document](#)



Enterprise Asset Management

The EBS team is working with Procurement and LSI Consulting to revise and update the contract. The contract documents frame the terms and conditions, scope, roles and responsibilities, timeline, price, and system architecture of this Project.



The contract is targeted to be complete October of 2016.

SAP Tips & Tricks

User Interface Shortcuts

You may already know about these handy text shortcuts in SAP. But there's probably one or two from this list that you may not know about. Check out this list and try these

out sometime if you're not already using them. They will make your day using SAP a lot faster.

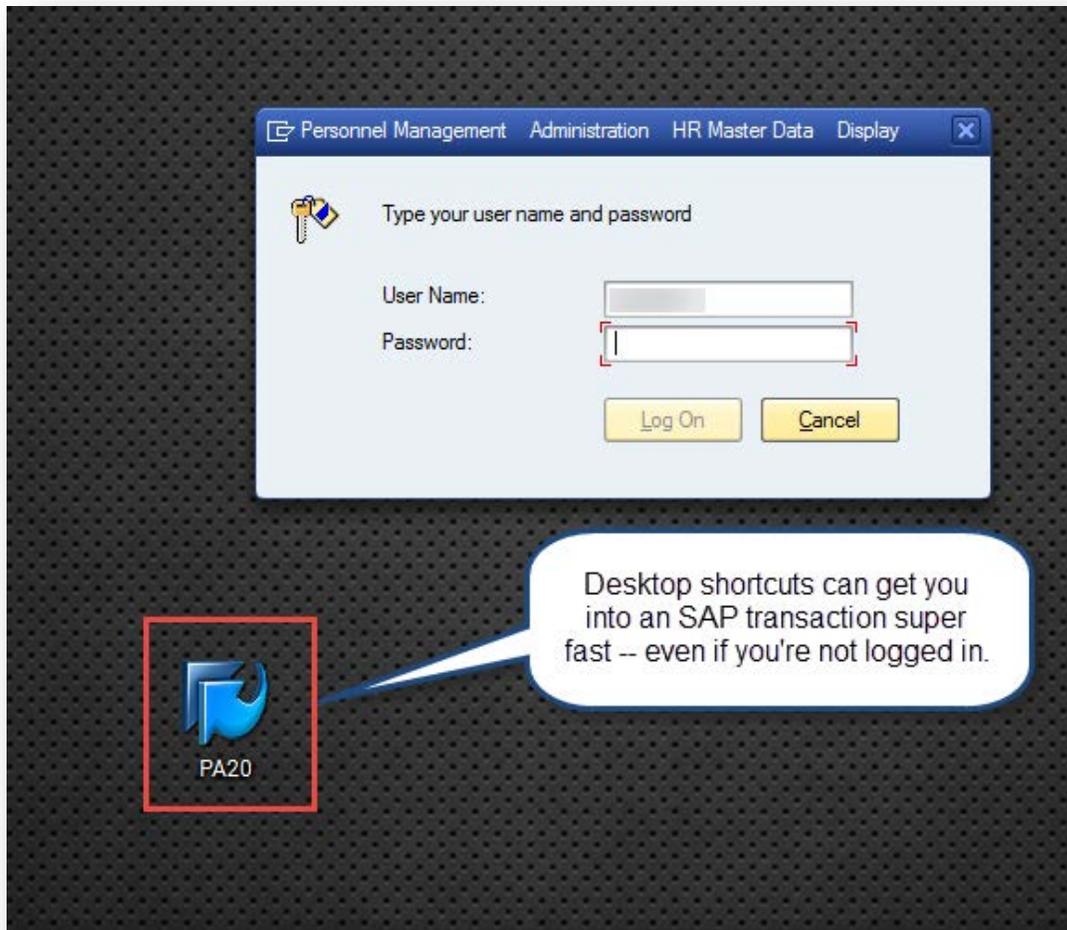
(This list is also attached in PDF form or can be found [here](#). Please share with your SAP users.)

Shortcut	What it does.
<code>/n</code>	Takes the user to the root SAP Easy Access menu from anywhere.
<code>/n + [T-code]</code>	Takes the user directly to the desired T-code from anywhere. For example, <code>/nVA01</code> will take the user directly to the Create Sales Order screen.
<code>/* + [T-code]</code>	Like <code>/n + [T-code]</code> , but takes the user directly into the desired T-code with the last values used. For example, <code>/*XD02</code> will take the user directly into change mode screen for the last customer you were changing.
<code>/nex</code>	Closes all windows for the current system/client and logs off of SAP.
<code>/o</code>	It also allows you to open a new session.
<code>/o + [T-code]</code>	When used as a prefix to a transaction code, it will open the target transaction in a new window. For example, <code>/ova01</code> will open up the Create Sales Order screen in a new window.

Creating a Transaction Code Shortcut on Your Desktop

Many of you go into specific transactions over and over during a day. While it's easy enough to login to SAP and then click on one of your favorites, did you know that you can also create a desktop shortcut out of a transaction favorite? With a simple double-click on such a shortcut, you can log directly into that specific transaction in SAP. Super fast. Super easy.

Watch [this video](#) to learn how: <https://youtu.be/E7R3hajnR6k>



EBS Has a New Logo

You may have noticed that the EBS Team has adopted a new logo. If you're curious why this change was made, you can find the explanation [[HERE](#)].



Online Resources: Change Agents

► [Bureau Change Agents](#)

- ▶ [Change Agent Guide](#)
- ▶ [Change Agent Resource Page](#)

Online Resources: All Users

- ▶ [SAP Documentation](#)

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