

A photograph of a person on the deck of a boat, leaning over and handling ropes. The boat's hull is dark with the name 'almoghli' written in white. The background shows a bright sky and the sea.

Simplified Order Entry and Projects Validation

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Agenda

- 1. Introduction**
- 2. Overview – Who we are @ Siemens–6 min video**
- 3. Data Management before Winshuttle**
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Solutions using transaction SHUTTLE / Runner**
- 5. Return on Investment**
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Introduction – Michael Vlad

- Started with Siemens Canada BT Division as a building automation project manager – certified PMP
- Project team leader for Project System Module during the SAP implementation project (1 ½ years duration), responsible for migration of 3000 projects from legacy systems; met the aggressive deadline of Go Live date of April 7, 2006
- 6 years SAP experience (SAP 4.6C)
- Current primary responsibility: SAP National Projects / Training / Support / Process Optimization / Other 3rd party tools maintenance

Overview – Who we are @ SIEMENS

[SV_English_Final_301208.wmv](#)

- Building Technologies is part of Industry Sector @ Siemens Canada Ltd.
- Provides a complete offering of technical infrastructure for security, life safety, comfort and efficiency in buildings. Innovative products, systems, total solutions and services - worldwide
- 60 % of the business mix of Building Technologies are projects related to construction industry

Website:

http://www.siemens.ca/web/portal/en/ProductsServices/Pages/building_technologies.aspx

Overview – What is a project

- Based on PMI the definition of a project is:

“A temporary endeavor undertaken to create a unique product, service or result”
- We manage projects based on PM@ Siemens methodology comprising of 5 process groups: initiating, planning, executing, monitoring and controlling and closing.
- In BT world a project is created in SAP from a template:



Overview – What is a project

- We are also creating small projects that we call “small works” which are executed much faster



- In SAP we manage “projects” in PS (Project System) module and “small works” in CS (Customer Service) module

Data Management before Winshuttle

- Manual entry
- Decentralized at the branches (x 10)
 - Creating and setting up a Project in SAP using Project System module with the characteristics of construction industry e.g. hold back, retention billing and progress billing – it took approx. 1 ½ hrs
 - Creating and setting up Small Work type project in SAP using the Customer Maintenance Module (Service) – it took approx. ½ hrs

Data Management before Winshuttle

- Many data entry errors caused by manual data entry into SAP R/3 >>> correcting errors and sometimes Order Intake not recognized in a timely fashion
- Labour intensive work processes
- Ineffective use of employee time doing manual SAP data entry

Options

- **To continue.....Manual data entry**
- **Custom ABAP programming – by CIO**
 - >> eCATT
 - >> SAP Solution – LSMW
- **Third party tools**

The solution? Winshuttle

- Discovered Winshuttle during a visit to our colleagues in the USA during “exporting” a Canadian customized report into their SAP platform

- Key reason for selecting Winshuttle
 - > Secure by maintaining the SAP security
 - > Proven and Flexible Solutions
 - > Used by Siemens BT USA and easy approval for Implementation from CIO
 - > Very easy to Use and Easy to Deploy

The solution? Winshuttle

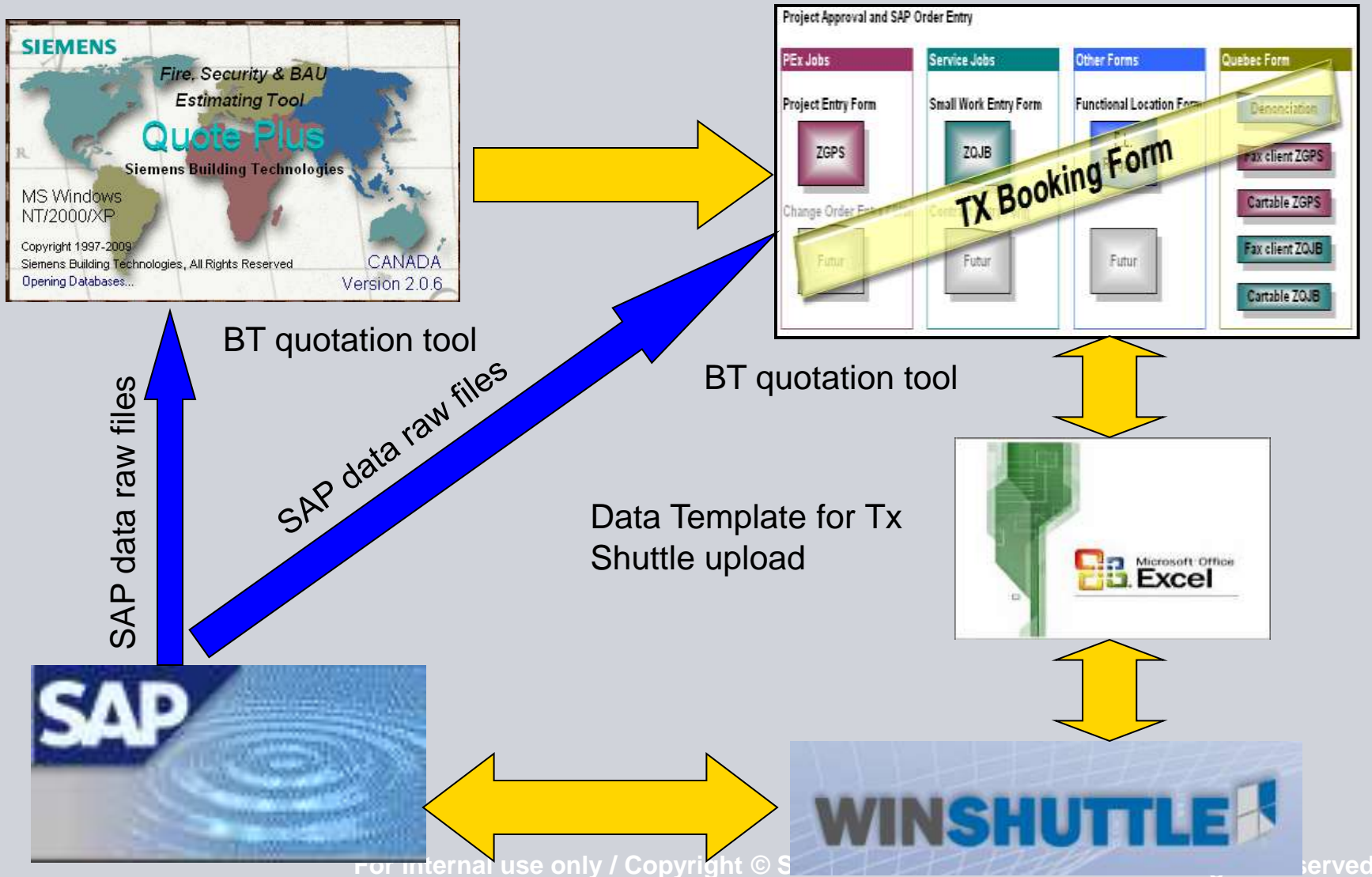
- Downloaded and experimented for one week with the project creation in PS module and then presented the solution to the top management (initially the 45 minutes of a project creation task was reduced to under 2 minutes)
- Achieve standardization, simplification and an optimized process
 - Centralized Projects Creation in SAP (WBS + SW)
 - Centralized error Handling process
 - Order Intake for projects and small works for our company is loaded automatically in SAP

Simplified Data Management via Winshuttle Solutions using transaction SHUTTLE / Runner

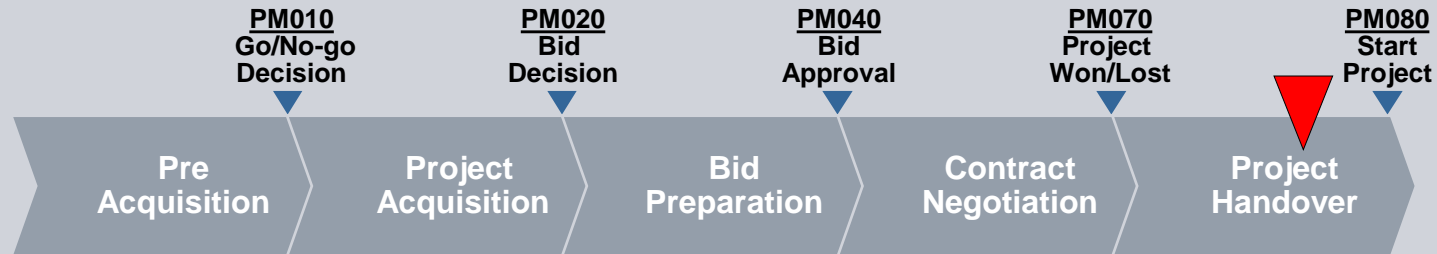
SIEMENS

Add an excel with the big picture – tonight

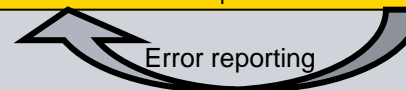
TX Shuttle DATA Load Process



Process Overview



Quotation Tools	TX Booking Form	TX Booking Approval	TX Shuttle	SAP validation
<p>CS Estimating .xls etc..</p>				
<i>Sales Rep</i>	<i>Sales Rep</i>	<i>Controller</i>	<i>Automatic</i>	<i>TX Team / Controller</i>



Branch Approval Chart



This CHART is updated by the Branch Controller and reflects the **Branch specific** approval structure!!

Example Small Works:

Small Work Approval			
BAU	Sales Manager	Service Manager	Branch Manager
Name	Gilles Blouin	Stephane Lapierre	Marcel Laflamme
Email	gilles.blouin@siemens.com	stephane.lapierre@siemens.com	marcel.laflamme@siemens.com
Approval needed below %GM	100%	100%	0%
Approval needed above Sell Value \$	10000.00	5000.00	149999.00
FS	Sales Manager	Service Manager	Branch Manager
Name	Jean-Marc Gervais	Stephane Lapierre	Marcel Laflamme
Email	jean-marc.gervais@siemens.com	stephane.lapierre@siemens.com	marcel.laflamme@siemens.com
Approval needed below %GM	100%	100%	0%
Approval needed above Sell Value \$	5000.00	5000.00	149999.00
SES	Sales Manager	Service Manager	Branch Manager
Name	Jean-Marc Gervais	Stephane Lapierre	Marcel Laflamme
Email	jean-marc.gervais@siemens.com	stephane.lapierre@siemens.com	marcel.laflamme@siemens.com
Approval needed below %GM	100%	100%	0%
Approval needed above Sell Value \$	5000.00	5000.00	149999.00

Divisional Approvals based on % GM and \$ Sales amount

Organizational Approvals based on LoA %GM and \$ Sales amount

Branch Controlling Controller	Name	E-mail	Login Approval
	Michel Pregent	michel.pregent@siemens.com	pregentm
Substitute #1	Marie Francis	marie.francis@siemens.com	franci-m
Substitute #2	Stephane Lapierre	stephane.lapierre@siemens.com	lapierres
Substitute #3			
Substitute #4			
Substitute #5			
Substitute #6			
Substitute #7			
Substitute #8			
Substitute #9			
Substitute #10			

Branch Controlling approval based on NT Login authorization

TX Shuttle DATA Load Process – Branch Files



FILES

Project Approval and SAP Order Entry Vxx.xls (PASOE file)

Working file used to enter all the project's information. The Vxx indicate the version like V5w as an example.

MainInfo.xls

Master file containing all the information related to customers, functional locations, employees and labor rates. This file is updated every night and the information comes from SAP.

Approvals.xls

File containing the "Branch" LoA.

Options.xls

File containing the "Main Region" selected by each users of the PASOE file

TX Shuttle DATA Load Process – HQ Files

FILES

VA41_Small_Works.xls

File that contains all small works information to be uploaded in SAP. This file is populated with job's information every time the controller approves a small work job. Every night, the Shuttle software takes the information of this file and send it to SAP. After this, the information in the file is automatically copy into an "Errors" file and cleared.

CJ01_WBS.xls

Same as above but for WBS job.

VA41_SW_Errors.xls

Error file that contains all the small works information for all the branches. This file is used to capture all errors that can occur during the transfer from Excel to Shuttle to SAP.

CJ01_WBS_Errors.xls

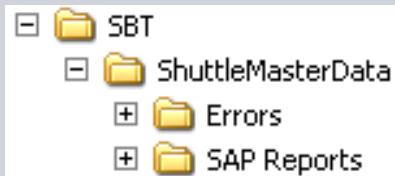
Same as above but for WBS job.

TX Shuttle DATA Load Process – Typical Branch

FOLDERS STRUCTURE

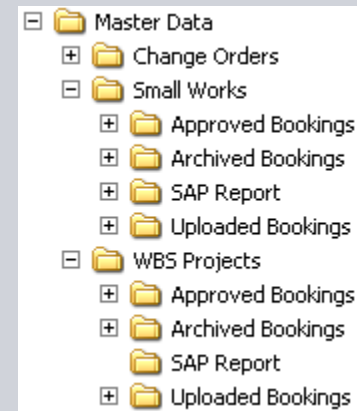
National Server Contains:

SAP Text Files that is used to update the MainInfo.xls
MainInfo.xls updated every night and copied to all branches
VA41_SW_Errors.xls
CJ01_WBS_Errors.xls



Branch Server Contains:

MainInfo.xls updated every night
Approvals.xls
VA41_Small_Works.xls
CJ01_WBS.xls



TX Shuttle DATA Load Process – Typical Branch

DATA TRANSITION



Quote+ will generate an Excel file with job data from the template “Project Approval and SAP Order Entry V03.xls”

By clicking the JobInfo button, this will open the Options.xls file to get the actual user’s region (province), open the MainInfo.XLS to populate the data for the drop down menus and open the Approvals.xls to get the actual Branch LoA information

Employee will complete job information and will approve the file. Automatically, the file will be saved on the server in a specific “APPROVED” folder with pattern JobNameEstimate#.xls. An email will also be generated to all the LoA recipients for their approval

By clicking the Controller approval button, this will open the VA41_Small_Work.xls or the CJ01_WBS.xls and copy the project’s information to one of these files.

TX Shuttle DATA Load Process – Typical Branch

DATA TRANSITION



A	B	C	D	E
ID Column	Customer purchase order number	Customer purchase order date	Sold-to party	Ship-to party
	VBKD-BSTKD	VBKD-BSTDK	KUAGV-KUNNR	KUWEV-KUNNR
1	Header or Detailed Data	Header	Header	Header
2	From YBA script	From YBA script	From YBA script	From YBA script
3				
4				
5				
6				
7				

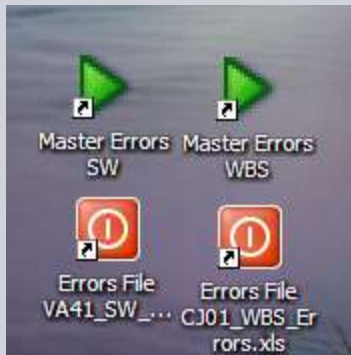
Every night, the WinShuttle software will open and get the information of VA41_Small_Work.xls and CJ01_WBS.xls of each branches and transfer it to SAP.

After 10 minutes VA41_Small_Work.xls and CJ01_WBS.xls will automatically copy all their information to VA41_SW_Errors.xls and CJ01_WBS_Errors.xls and clear their information to get new data for the next day. After this, all files will be saved and closed

Every morning, the “TX Shuttle team” will check the errors files to assure that all the entries validated for accuracy in SAP

Error Resolution

Example for projects



Return on Investment

Task	Records	Freq.	SAP Module	Setup / Run Time	ROI (CND)	Advantages
Loading Automatically Projects and Small Works	56564	Daily	PS / CS	5 hours – by scheduler	220 FTE	Improved Data Integrity Reduction in manual data entry errors / corrections Improved Productivity Streamline the sales process
Loading new materials in MM, various MM maintenance	458	Daily	Master Data	FTE	?????	Improved Data Integrity Reduction in manual data entry errors / corrections Improved Productivity

Looking Forward

- Automation of Projects Change Orders and Re-estimates
- Automation of Service Contracts Upload in SAP
- Exploring new ways using Winshuttle new product range for improving the current automated process

Questions

Questions

