How to leverage SAP Notifications to meet any business need

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How to leverage SAP Notifications to meet any business need

- WHAT: Overview of SAP Notifications
- WHY: Benefits of using SAP Notifications
- HOW: Demonstrations and Examples
WHAT... is a Notification?

- SAP Notifications are cross-application tools that allow you to capture any business information in a flexible and powerful structure.

- In standard SAP, Notifications are primarily used in the following areas:
  - Quality Notifications (Quality Management)
  - Maintenance Notifications (Plant Maintenance)
  - Service Notifications (Customer Service/Service Management)

- BUT.. Notifications can be easily enhanced and adapted to meet just about any business need!
Notification Structure

- Partner Org. Structure
  - User Vendor
- Q. Notif Header
- Tasks
- Activities From Action Box

Nonconformance Item

Causes

Tasks

Activities

Notification header
- Info related to the overall notification
  - General data
  - Tasks
  - Activities

Item overview

- Item
- Item
- Item

Individual notification related defects

Information related to a single defect item

Causes

Tasks

Activities
Notification Structure

- **Header** - Contains a variety of general identification and processing information that applies to the quality notification as a whole.

- **Partners** - Employees, business partners (customers, suppliers), and/or locations that are referenced or responsible for the Notification.

- **Items** - By default, contains coded information regarding a problem or defect but can be adjusted to track any type of coded information. One or more items can be created for a notification.

- **Tasks** - Used for tracking assignment, planning, and status information. One or more tasks can be created against the notification header or for a notification item.

- **Activities** - Used for tracking coded events or actions. One or more activities can be created against the notification header or for a notification item.

- **Causes** - By default, one or more coded reasons against an item record.

- NOTE: Don’t get caught up in the naming… these are simply “information structures” that can be configured (and even renamed) to meet your needs.
Okay... Once I have the data in a Notification, what can I do with it??
**Notification Example**

Create Notification: Vendor/matl problem

- Notification Header, Tabs, and Tab content can all be defined using configuration (no ABAP required!)
- All selectable options are defined in the QM Catalogs
- Action Boxes can be configured to run standard or custom functions/processes
- You can select which standard subscreens appear on each tab (and where they go) or your IT department can help define your own fields and subscreens
### Reference fields and screens

<table>
<thead>
<tr>
<th>Quantities</th>
<th>Reference object</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complaint qty</td>
<td>Material QM_PPAP_EA</td>
</tr>
<tr>
<td>Ref. quantity</td>
<td>QM_PPAP_PLAN_SELECTION-EA</td>
</tr>
<tr>
<td>ReturnDelivQty</td>
<td>Revision Level</td>
</tr>
<tr>
<td>Def. qty (int.)</td>
<td>Serial number</td>
</tr>
<tr>
<td></td>
<td>Device data</td>
</tr>
<tr>
<td></td>
<td>Vendor Mat. No.</td>
</tr>
<tr>
<td></td>
<td>MPN Material</td>
</tr>
<tr>
<td></td>
<td>Reference Documents</td>
</tr>
<tr>
<td></td>
<td>Reference no.</td>
</tr>
<tr>
<td></td>
<td>Reference Documents</td>
</tr>
</tbody>
</table>

- There are many standard reference fields/screens that can integrate into existing SAP processes and systems.
Notification Example

- All standard and custom partners can be referenced
Notification Example (continued)

- Tasks can be assigned and tracked
- Activities can be used to log significant events
WHY… use a Notification?

- Notifications are not limited to the Quality, PM, and Service space. They can be used to track just about anything!
- Notifications are built into SAP ECC so you already own the functionality – not additional licensing is required (ROI)
  - In addition, Notifications can be easily integrated with other ECC areas including MM, PP, SD, FI/CO, PS, DMS, etc.
- Notifications can be configured and used without relying on IT
  - BUT… IT can help tailor your solution (usually with minimal effort)
SAP Notifications: Benefits

- Flexible and scalable!
- Custom subscreens are standard. (Note: Requires ABAP resource for custom functionality)
- Notification User Status can be used to manage business requirements (email, print, manage work steps, etc. and track sub-process steps)
- Workflow and deadline monitoring are standard
- Notification Items can be used to track used multiple catalog types of information including causes, activities, defect locations, defect codes, etc.
- Action boxes extends other SAP functionality to the specific notification
- Notification tasks can be used to assign individuals work to do with workflow.
- Can be used to manage almost any business process
SAP Support of Notifications

- SAP continues to update and enhance Notifications in various ways:
  - Continuously offer new features via ECC Enhancement Packages
  - Notification integration to new Quality Issue Management (QIM) tool and MII
  - Notification creation via SAP ERP Quality Issue mobile app
  - Various standard reporting and analysis options are available too
EhP 3: Send Notification e-mail with attachments

- Notification with assigned documents from SAP Document Management System.
- Activity to send notification to involved parties.
- New for sending attachments with EhP3.
EhP 4: Support for Digital Signatures

When processing a notification, digital signatures are required for distinct steps, e.g. on status change or when performing distinct activities at header or task level. Also signature strategies are allowed.
Integration with SAP’s new Quality Issue Management (QIM) tool

SAP QIM – A Comprehensive Approach
Monitoring, Coordinating, and Analyzing Issues and Activities

### Flexibility in defining relevant queries

Across different sources and applications, e.g. ERP notifications and items, audit actions, FMEA defects

### Monitoring control via traffic light
Web-based Entry of Notifications via SAP MII

- Example is available as part of the QM productivity pack for SAP MII
- Download via https://www.sdn.sap.com/irj/sdn/downloads
Reporting and Analysis

- **Standard SAP reports/worklists for Notifications:**
  - Notification: QM10/11/50, IW28/29/30, IW58/59
  - Item: QM14/15, IW68/69
  - Task: QM12/13, IW66/67
  - Activity: QM16/17, IW64/65

- “QM Cockpit”
  - New ECC-based reporting tool

- **BW**
  - Standard Notification extracts exist

**QM Cockpit for Evaluations**
- Ad-hoc evaluations of quality notifications
- Specific graphics types:
  - Pareto Chart
  - Scatter Plot

**Queries and Figures via SAP NetWeaver BW**
- Notifications: Number, in time, outstanding
- Tasks: Number, outstanding, successful
- Time: Processing time, down-time ...
Endless possibilities

- Engineering Change Management
- Financial and Process Auditing
- Compliance (Conflict Minerals)
- Product Innovation
- Issue Tracking and Management (Help Desk)
HOW ... can I get started using Notifications?

1. Identify the business opportunity
2. Identify the information and tracking needs
3. Use SAP’s standard Notification structures to look for similarities that can be leveraged in your custom Notification
4. Configure a “prototype” system in you SAP Sandbox
5. Finalize the requirements and solution, transport through your production landscape
6. Celebrate your success!!
Getting started: the basics in 8 easy steps!

- “Customer Contact” notification
- Scenario: We need a place to capture information and create follow-up tasks each time a customer calls
- First, go to the Quality Notification configuration options within the IMG:
Step 1: Create New Notification Type

- Select “Define Notification Types” in the IMG

- Since we want to capture customer-related information, start by copying one of the existing customer-based notification types. Enter your new two character notification type and description.

- NOTE: Don’t worry about the other field values for now.
Step 2: Define the Screen and Tab Layout

- Copy standard screens and tabs (but this is where you go to easily customize the layout later on)

Transfer of Customizing Settings in Table TQSCR

<table>
<thead>
<tr>
<th>Activity</th>
<th>Notification type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy Screen Areas from the Standard System</td>
<td>21</td>
</tr>
<tr>
<td>Define Screen Areas and Tabs</td>
<td></td>
</tr>
<tr>
<td>Define Initial Screens</td>
<td></td>
</tr>
<tr>
<td>Format Notification Long Text</td>
<td></td>
</tr>
<tr>
<td>Field Selection: General Screens</td>
<td></td>
</tr>
<tr>
<td>Field Selection: Initial Screens</td>
<td></td>
</tr>
<tr>
<td>Field Selection: Reference Object Screens</td>
<td></td>
</tr>
<tr>
<td>Field Selection: Partner Screens</td>
<td></td>
</tr>
</tbody>
</table>
Step 3: Configure/Create Catalog Data

- Catalogs contain coded values that you can reference in your notification.
- Start with the Catalog Type
  - Select if existing ones should be used or if new Catalog Types are needed
Step 3: Configure/Create Catalog Data (continued)

- Create your catalogs by first creating one or more groups and then enter the coded values for each group.
- It can be helpful to start each group with the same prefix.
Step 3: Configure/Create Catalog Data (continued)

- Repeat the catalog creation steps for your Tasks, Activities, and all other catalog data
  - You can always add this information later if you aren’t sure what to enter yet

![Diagram of catalog creation steps for Tasks and Activities]

- Catalog: 2 Tasks
- Code group: CC-TASKS
- Codes:
  - Code: FOLL, Short text for code: Follow-Up Call
  - Code: RESR, Short text for code: Research Suggestion

- Catalog: 8 Activities (OM)
- Code group: CC-ACT
- Codes:
  - Code: A, Short text for code: Customer Call
  - Code: B, Short text for code: Customer E-mail
  - Code: C, Short text for code: Internal Note
  - Code: D, Short text for code: Status Update
Step 4: Create a Catalog Profile

The Catalog Profile simply links “filters” your Catalog data so you don’t need to see all of the values used by other Notification types.

- Quality Notifications
  - Overview of Notification Type
  - Notification Creation
  - Notification Type
    - Define Notification Types
    - Define Number Ranges
    - Define Screen Templates
    - Allocate Start Values for Transactions
    - Allowed Change of Notification Type
    - Define Notification Process
  - Notification Content
    - Maintain Catalogs
      - Define Catalog Profile
    - Catalogs and Catalog Profiles for Notification Type
    - Assign Code Groups to Disciplines
  - Partners

- New Entries
- Dialog Structure
- Catalog profiles
- Catalogs / code groups
- Catalog profile
  - CC0000001
  - Catalog
    - D
      - CC*
    - 2
      - CC*
    - 8
      - CC*
    - W
      - CC*
    - X
      - CC*
Step 5: Link the Catalog Profile and Notification

- We need to link the Catalog Profile to the Notification so it knows which Catalog data to use.

Notice that custom catalog types were referenced here. You will see the impact in a later slide.
Since we copied a customer-specific Notification Type when we first created our Notification, those partner functions were copied over. If you needed to add/remove partner types, you can do it using these options:
Step 7: Define Priorities

Priorities can be used to determine the importance of a particular Notification (and drive due dates)

These values will be used to automatically set the start and end dates based on the priority selected.
Step 8: Test your new Notification

- Run t-code QM01 to try out your new Notification (and drive due dates)
Step 8: Test your new Notification (continued)

- Catalog values are available

![Diagram showing catalog values and notification setup](image)
Step 8: Test your new Notification (continued)

- Priority selection controls the start/end dates of the Notification

![Image of Priority selection details]

<table>
<thead>
<tr>
<th>Notification</th>
<th>%00000000001</th>
<th>Z1</th>
<th>Customer Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notific. Status</td>
<td>OSNO NOTI</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Execution**

- **Priority**: 3 Medium
- **Req. start**: 09/30/2013 17:03:45
- **Required End**: 10/25/2013 17:03:45
- **Malfunc. start**: 09/25/2013 17:06:08
- **Malfunc. end**: 00:00:00
Step 8: Test your new Notification (continued)

- Since the custom Catalogs “Impact” and “Materials” were used for the Item configuration, SAP automatically renames the columns to match the Catalog names.
Step 8: Test your new Notification (continued)

- Tasks and Activity Catalog values are now available

<table>
<thead>
<tr>
<th>No.</th>
<th>Code gr.</th>
<th>Task</th>
<th>Task code text</th>
<th>Task text</th>
<th>Task Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>CC-TASKS</td>
<td>FOLL</td>
<td>Follow-Up Call</td>
<td>Follow up with customer</td>
<td>TSOS</td>
</tr>
</tbody>
</table>

**Catalog Selection**

- Task
- CC-TASKS: Customer Contact Tasks
  - FOLL: Follow-Up Call
  - RESR: Research Suggestion

**Code groups**

<table>
<thead>
<tr>
<th>Code gr.</th>
<th>Short text</th>
<th>Status of code group</th>
</tr>
</thead>
<tbody>
<tr>
<td>CC-TASKS</td>
<td>Customer Contact Tasks</td>
<td>Released</td>
</tr>
</tbody>
</table>

**Catalog**

<table>
<thead>
<tr>
<th>Code</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Tasks</td>
</tr>
</tbody>
</table>

**Code group**

<table>
<thead>
<tr>
<th>Code group</th>
<th>Customer Contact Tasks</th>
</tr>
</thead>
</table>

**Codes**

<table>
<thead>
<tr>
<th>Code</th>
<th>Short text for code</th>
<th>Follow-up</th>
</tr>
</thead>
<tbody>
<tr>
<td>FOLL</td>
<td>Follow-Up Call</td>
<td></td>
</tr>
<tr>
<td>RESR</td>
<td>Research Suggestion</td>
<td></td>
</tr>
</tbody>
</table>
These are just a few basic steps to get started with creating your own custom Notification type.

Additional configuration is probably necessary to get everything working exactly as needed.
Recap

- WHAT: Overview of SAP Notifications
- WHY: Benefits of using SAP Notifications
- HOW: Demonstrations and Examples
THANK YOU FOR PARTICIPATING.

SESSION CODE: 510

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