Creating Projects in SAP

(Not Manually…With Winshuttle)

Corey B. Holstege
Project Lead, The Home Depot

WINSHUTTLE USER GROUP | ANNUAL CONFERENCE ATLANTA 2017

Agenda

- Introduction
- The Challenge
- The Solution
- Benefits, Lessons Learned & Future Plans
- Q&A

About The Home Depot

- Founded in 1978
- World's largest home improvement retailer
- More than 2,200 stores across North America.
- $88.5 Billion in Revenue in 2015
- 385,000+ Associates
- More than 35,000 products in store and more than 1 million products online

About me

- Transplant to Atlanta, GA from Grand Rapids, MI
- Project Lead in Finance Integration
- At The Home Depot for 2 years
- 4 years as an SAP Consultant with Accenture
- Worked with SAP for 8 years
- Avid DIY-er and bookworm

The Challenge

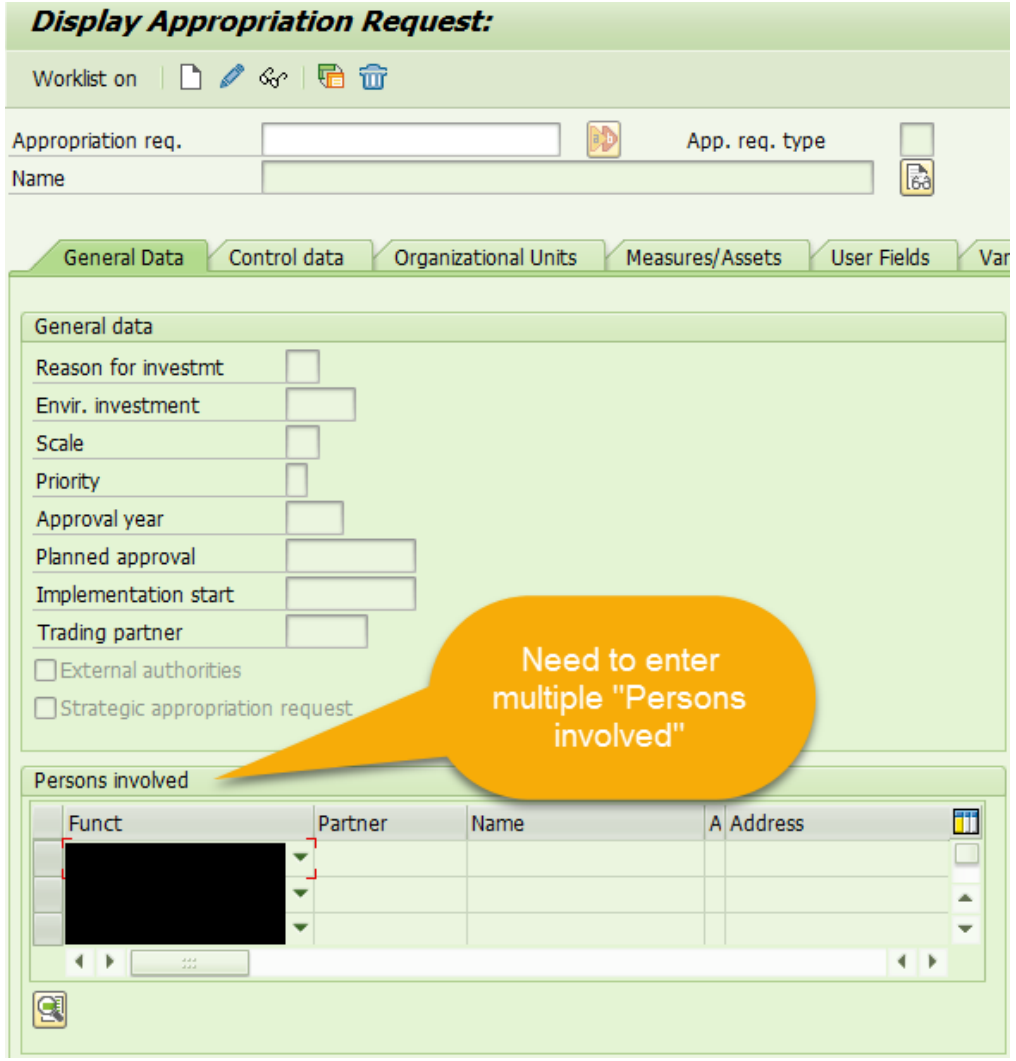
- A Finance group annually creates between 300 and 1,000 projects in SAP.
- One Associate would key these in manually, one at a time.
- It took approximately 5 minutes per project totaling 1 to 2 weeks full time (i.e. 40-80 hours) to create all the necessary projects.
- This Associate would literally do nothing else for up to 2 weeks.
- A 23 page SOP existed for this process, utilizing two Tcodes: IMA11 and CJ20N.

The Solution

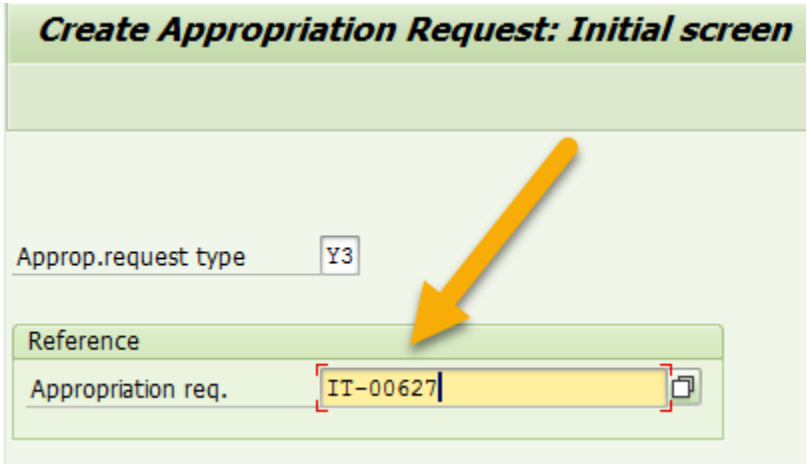
- Transaction V10.7
- 7 scripts total
- 6 of the scripts chained together
- 1 Excel workbook
- 1 Text file
- 1 macro

Script 1: Create Appropriation Request

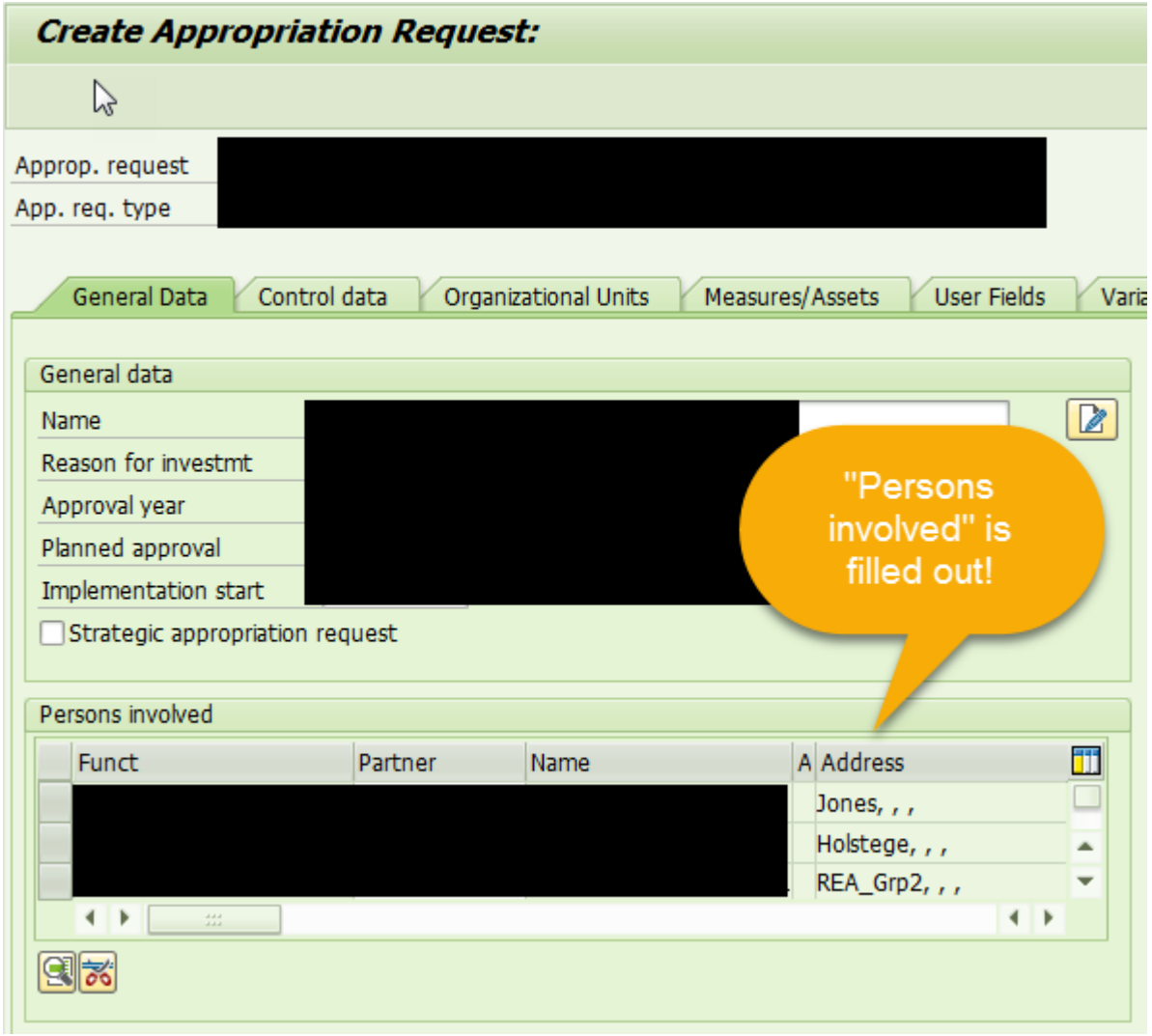
- Tcode: IMA1N
- Mode: Batch
- Number of Fields uploaded: 10



Script 1: Create Appropriation Request



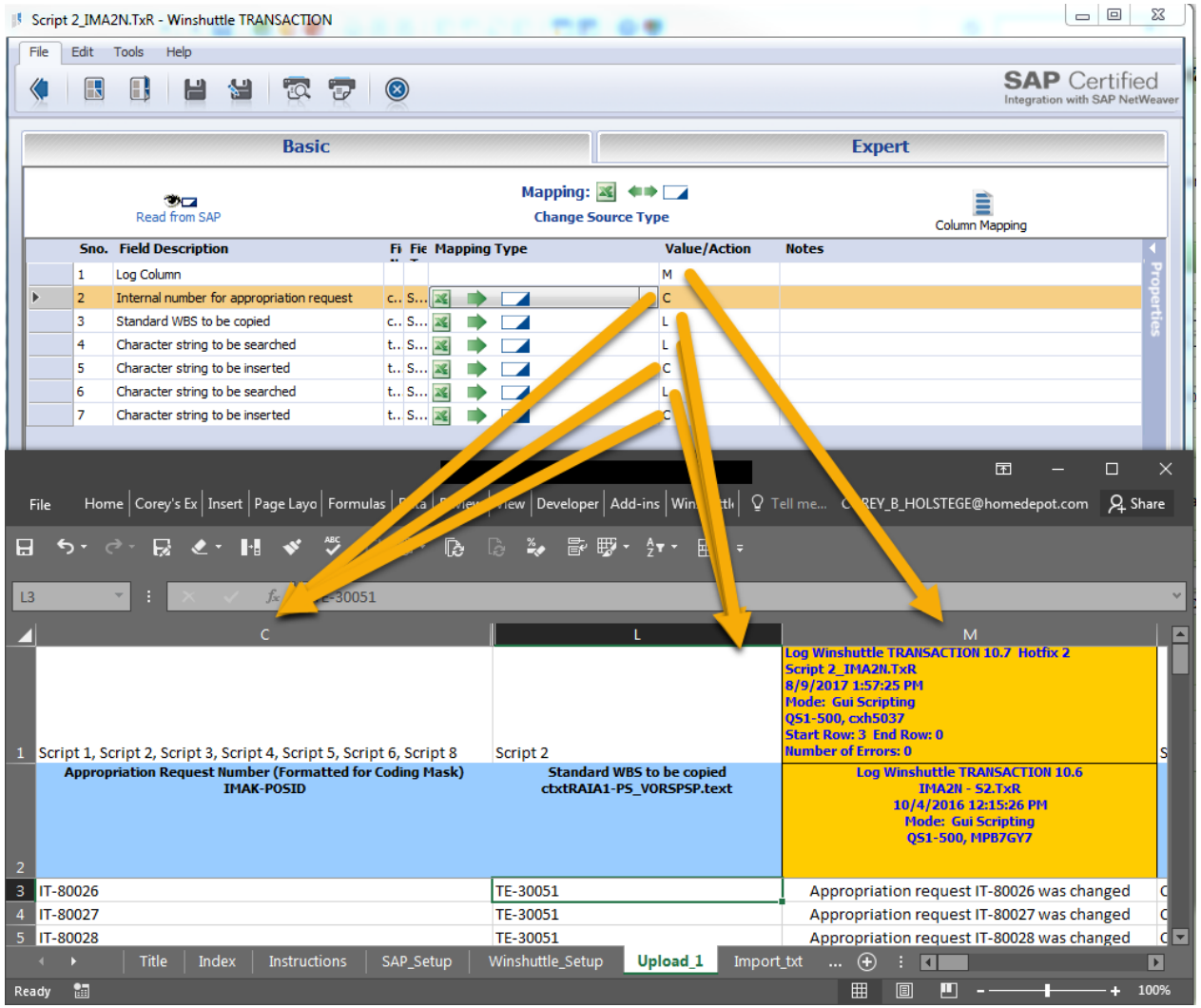
Using “Reference” can “insert” values you need!



Script 2: Create Capital and Expense WBS Elements

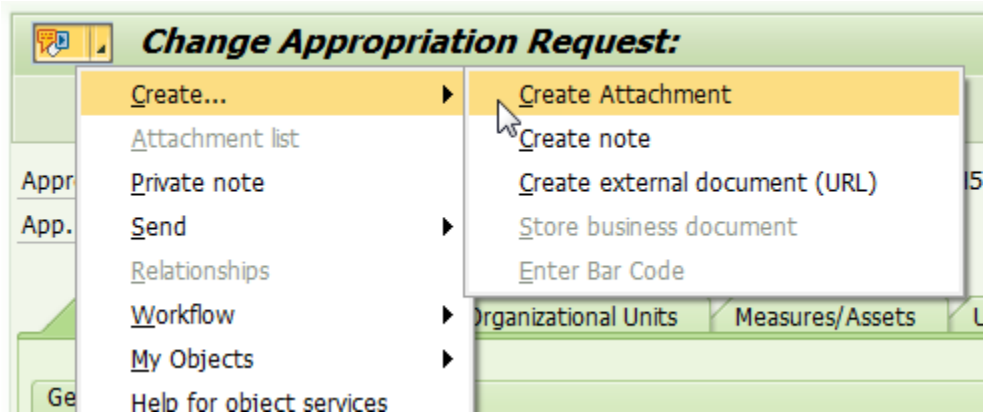
- Tcode: IMA2N
- Mode: GUI Scripting
- Number of Fields uploaded: 3

You can map multiple SAP fields from multiple Scripts to the same Column in Excel



Script 3: Attach Documentation in SAP

- Tcode: IMA2N
- Mode: GUI Scripting
- Number of Fields uploaded: 3



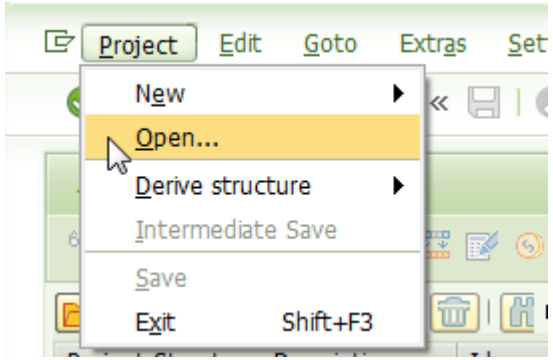
You can upload attachments!

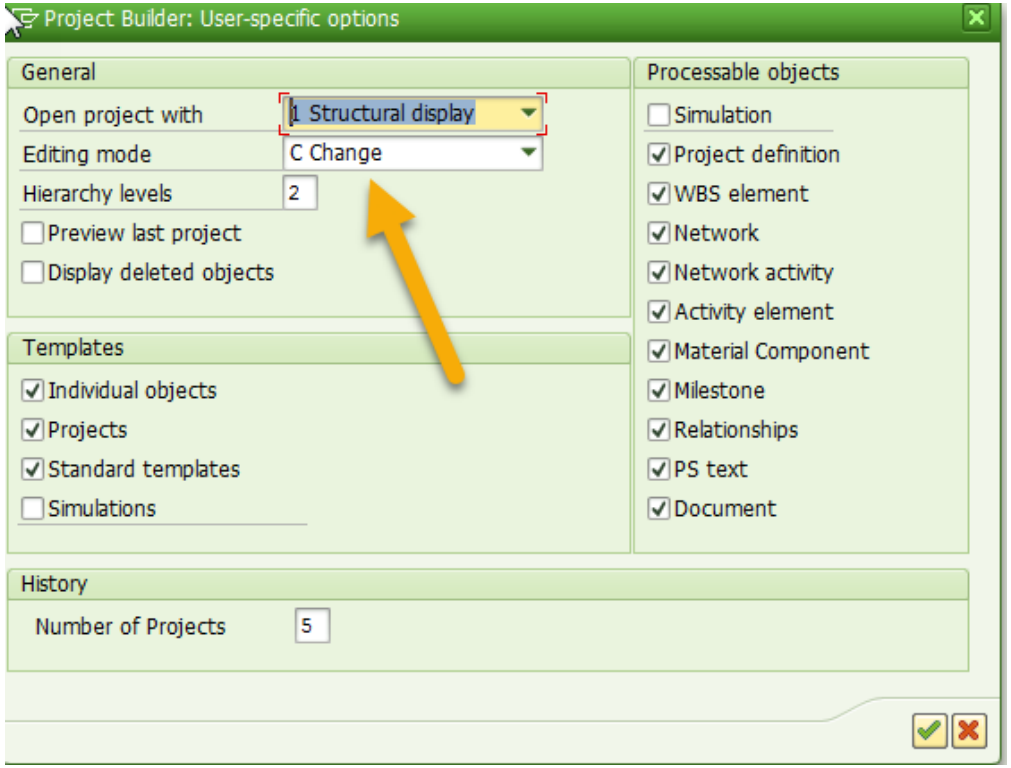
"No changes were made" doesn't mean nothing was done.

	C	N	O	P
1	Script 1, Script 2, Script 3, Script 4, Script 5, Script 6, Script 8	Script 3	Script 3	Log Winshuttle TRANSACTION 10.7 Hotfix 2 Script 3_IMA2N.TxR 8/9/2017 1:57:56 PM Mode: Gui Scripting QS1-500, cxh5037 Start Row: 3 End Row: 0 Number of Errors: 0
2	Appropriation Request Number (Formatted for Coding Mask) IMAK-POSID	Directory cbxtDY_PATH.text	File Name cbxtDY_FILENAME.text	Log Winshuttle TRANSACTION 10.6 IMA2N - Attachment.TxR 10/4/2016 12:22:03 PM Mode: Gui Scripting QS1-500, MPB7GY7
3	IT-80026	C:\Users\cxh5037\Documents	IT-01668 Project Name One Pager or CBA.xlsx	No changes were made to appropriation request IT-80026

Script 4: Enter additional Data

- Tcode: CJ20N
- Mode: Non-batch with Controls
- Number of Fields uploaded: 3



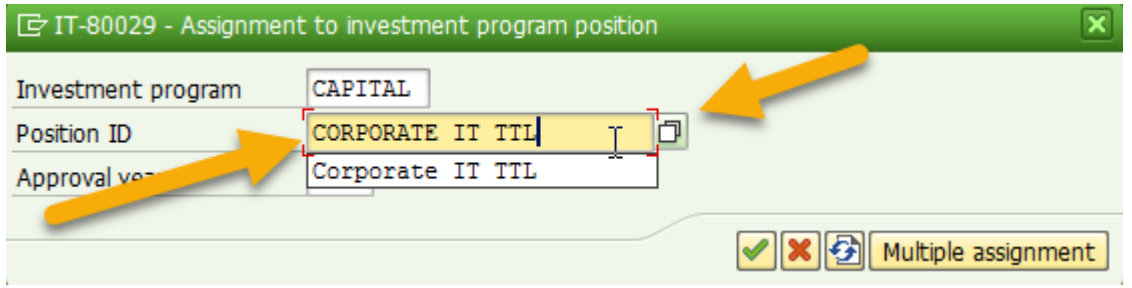


Always use the Menus in CJ20N.

There is a setting that controls if CJ20N opens in “Display” or “Change” mode.

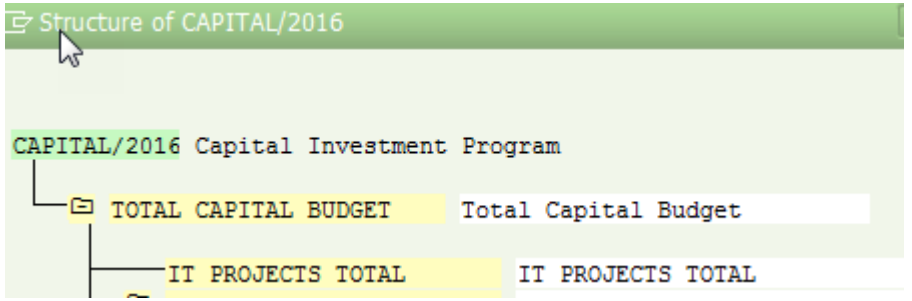
Script 5: Enter additional Data

- Tcode: CJ20N
- Mode: Non-batch with Controls
- Number of Fields uploaded: 4



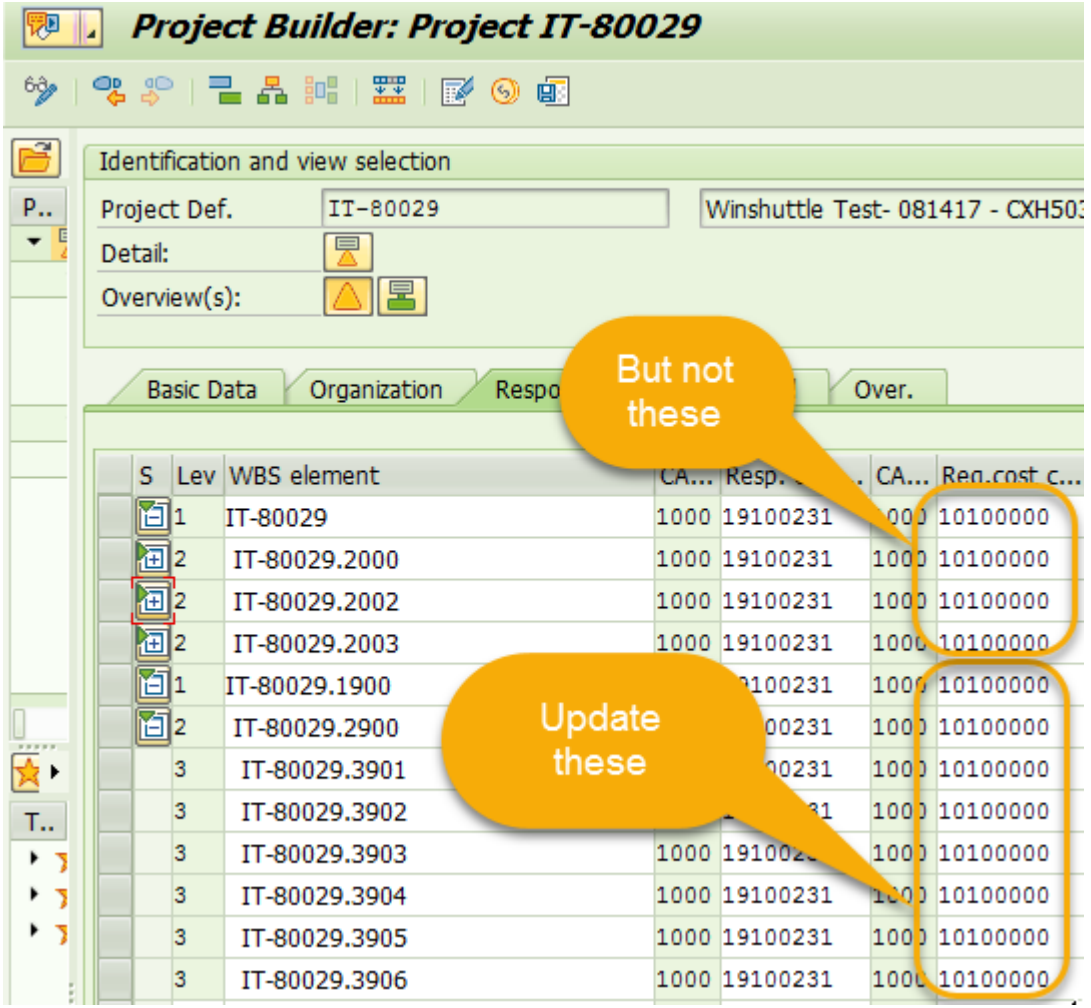
Deviate from the SOP where necessary.

Don't search….enter the value directly!



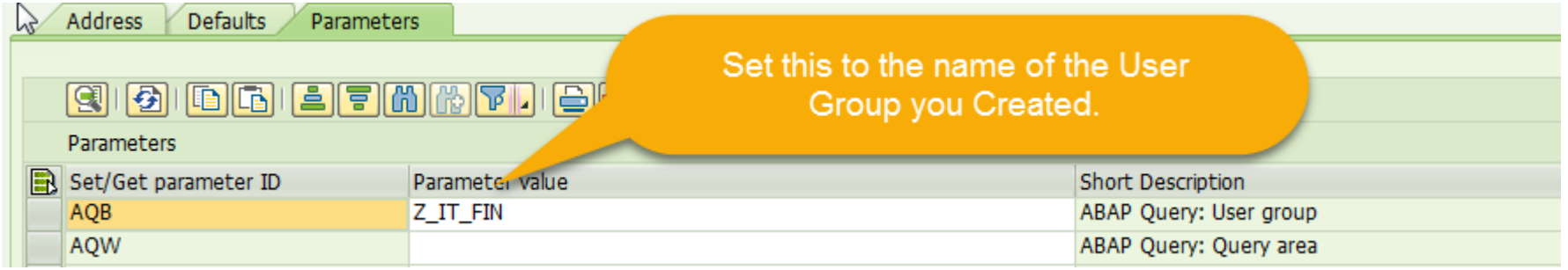
Script 6: Retrieve WBS elements

- Tcode: SQ01
- Mode: Batch
- Number of Fields uploaded: 1



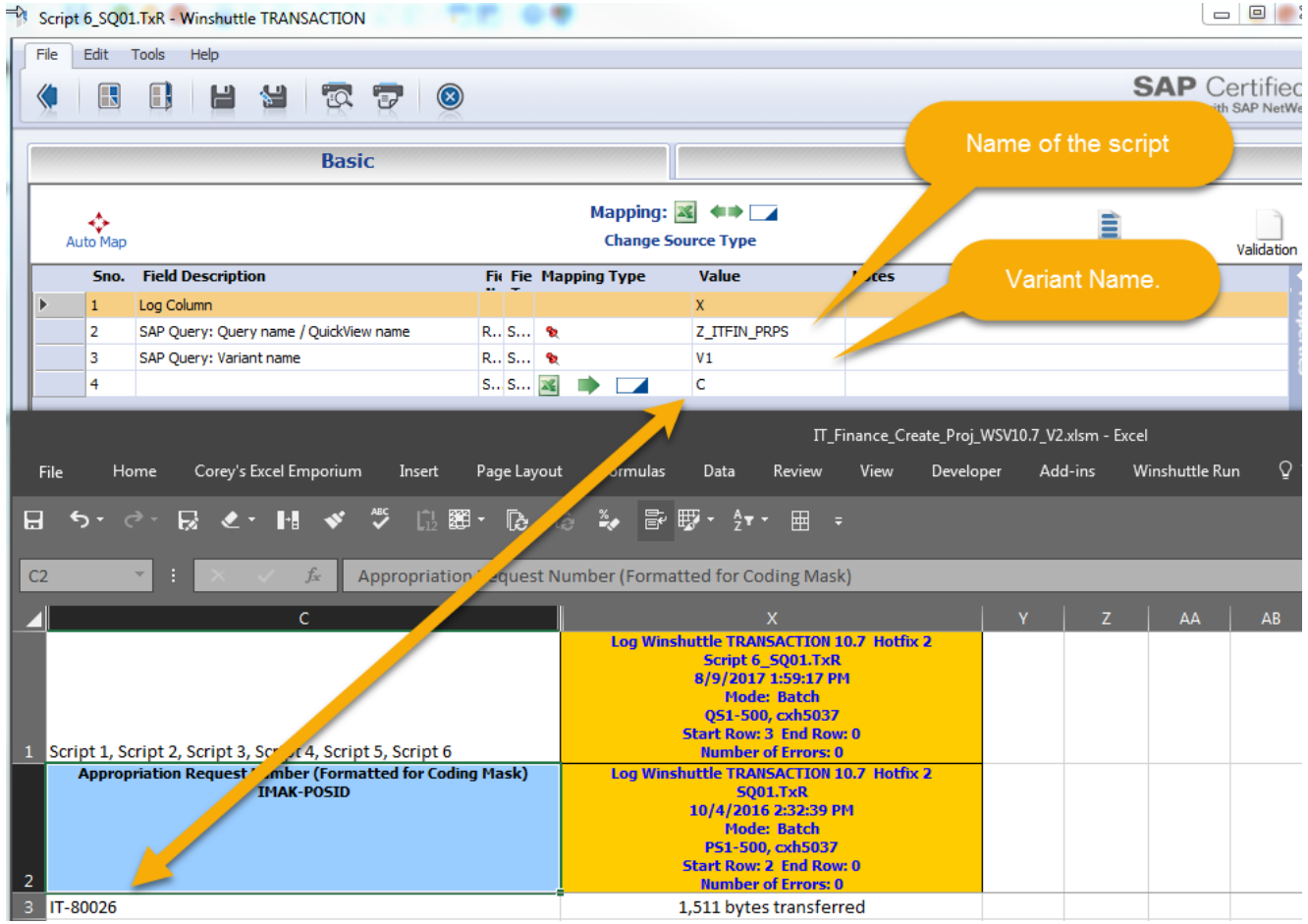
Script 6: Retrieve WBS elements

- Create Variant in SQ01 to store file location of text file
- Set User Parameters in SU3 to default Query Area and User Group in SQ01



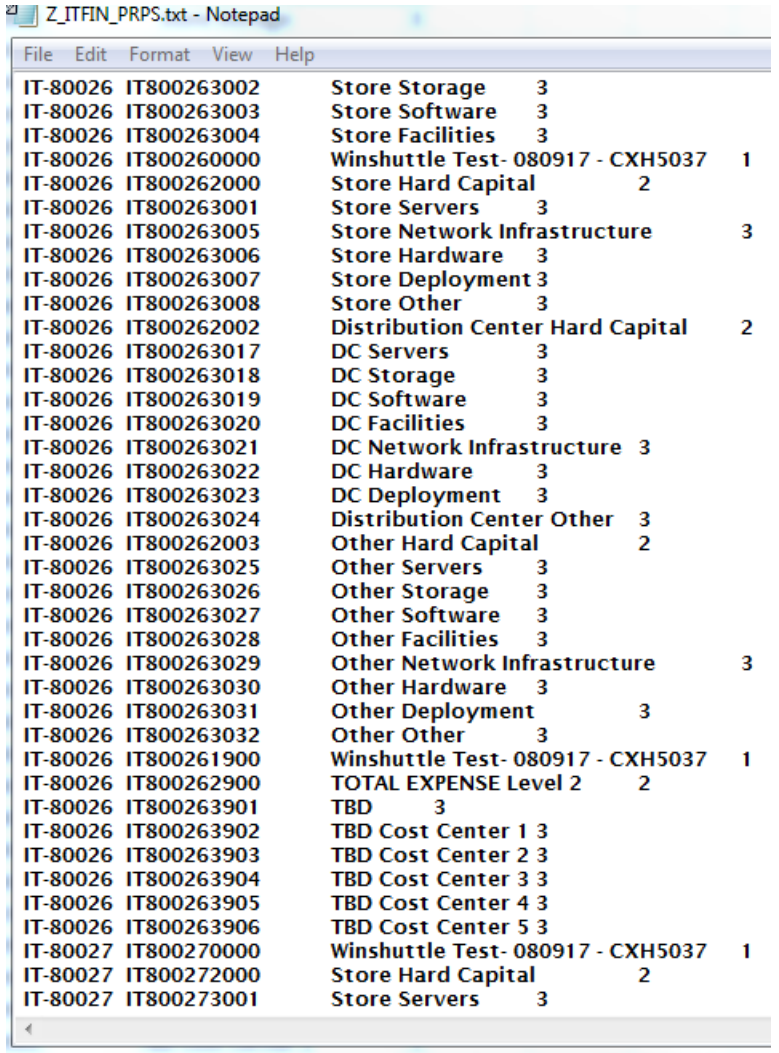
Script 6: Retrieve WBS elements

- Default the name of the query and the name of the variant in the script
- This reduces the input fields on the excel workbook
- Keeps the workbook clean for the user



Script 6: Retrieve WBS elements

- End result is a text file that lists:
  - Project #
  - WBS Element
  - Description
  - Level of the WBS Element in the project

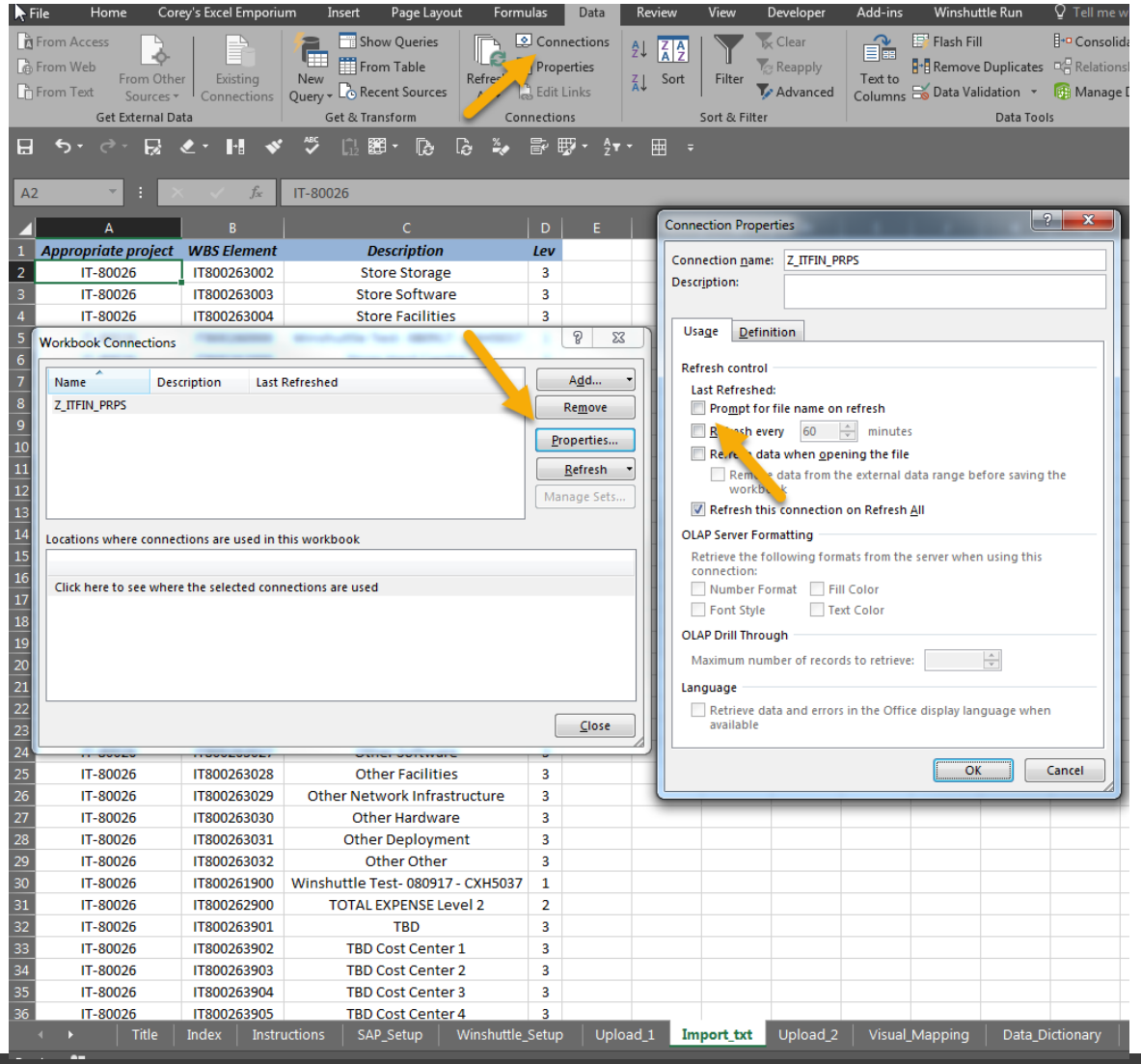

Z_ITFIN_PRPS.txt - Notepad

File Edit Format View Help

IT-80026	IT800263002	Store Storage	3
IT-80026	IT800263003	Store Software	3
IT-80026	IT800263004	Store Facilities	3
IT-80026	IT800260000	Winshuttle Test- 080917 - CXH5037	1
IT-80026	IT800262000	Store Hard Capital	2
IT-80026	IT800263001	Store Servers	3
IT-80026	IT800263005	Store Network Infrastructure	3
IT-80026	IT800263006	Store Hardware	3
IT-80026	IT800263007	Store Deployment	3
IT-80026	IT800263008	Store Other	3
IT-80026	IT800262002	Distribution Center Hard Capital	2
IT-80026	IT800263017	DC Servers	3
IT-80026	IT800263018	DC Storage	3
IT-80026	IT800263019	DC Software	3
IT-80026	IT800263020	DC Facilities	3
IT-80026	IT800263021	DC Network Infrastructure	3
IT-80026	IT800263022	DC Hardware	3
IT-80026	IT800263023	DC Deployment	3
IT-80026	IT800263024	Distribution Center Other	3
IT-80026	IT800262003	Other Hard Capital	2
IT-80026	IT800263025	Other Servers	3
IT-80026	IT800263026	Other Storage	3
IT-80026	IT800263027	Other Software	3
IT-80026	IT800263028	Other Facilities	3
IT-80026	IT800263029	Other Network Infrastructure	3
IT-80026	IT800263030	Other Hardware	3
IT-80026	IT800263031	Other Deployment	3
IT-80026	IT800263032	Other Other	3
IT-80026	IT800261900	Winshuttle Test- 080917 - CXH5037	1
IT-80026	IT800262900	TOTAL EXPENSE Level 2	2
IT-80026	IT800263901	TBD	3
IT-80026	IT800263902	TBD Cost Center 1	3
IT-80026	IT800263903	TBD Cost Center 2	3
IT-80026	IT800263904	TBD Cost Center 3	3
IT-80026	IT800263905	TBD Cost Center 4	3
IT-80026	IT800263906	TBD Cost Center 5	3
IT-80027	IT800270000	Winshuttle Test- 080917 - CXH5037	1
IT-80027	IT800272000	Store Hard Capital	2
IT-80027	IT800273001	Store Servers	3

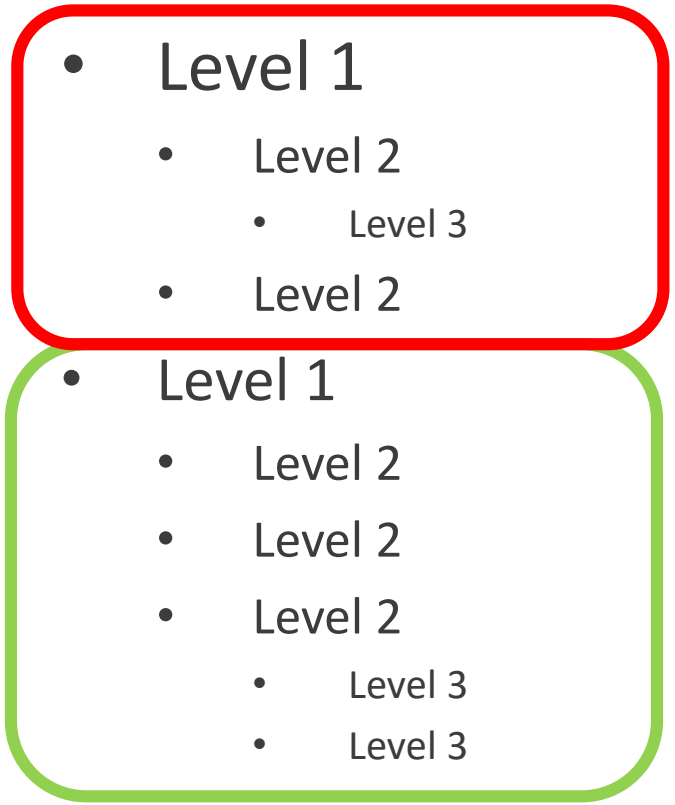
Load text file into Excel

- Link the text file to a worksheet in the Excel Workbook.
- After first load, uncheck “Prompt for file name on refresh”



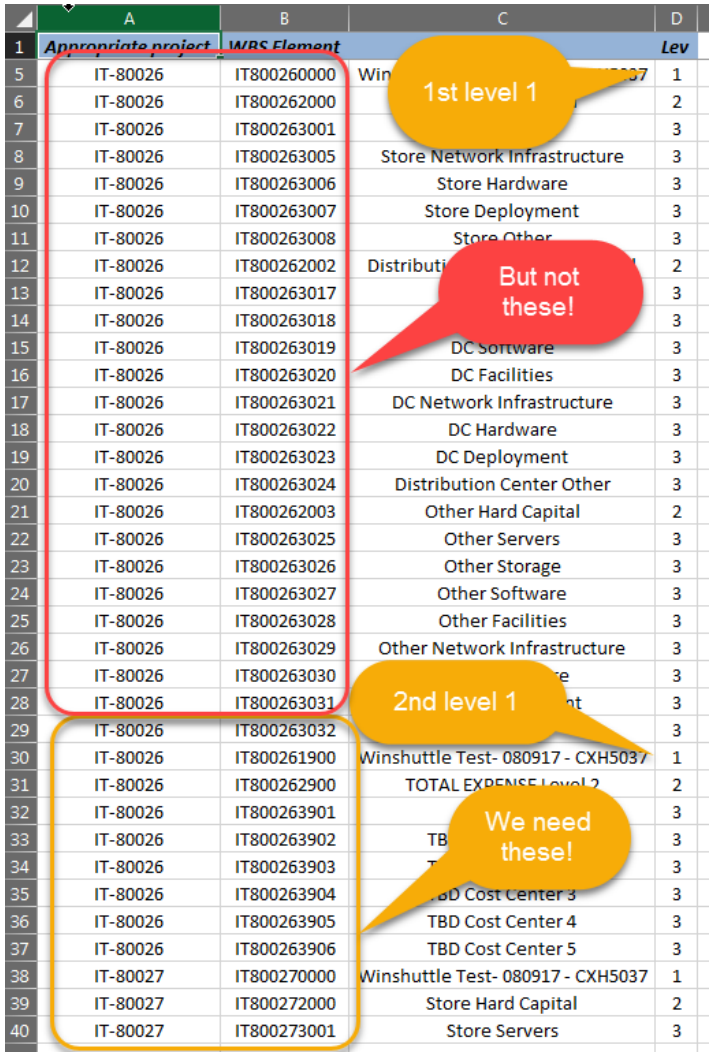
Remember…

- Remember SQ01 script downloaded ALL WBS #s for the project
- We only need to update the WBS #s under the Second Level 1



Macro to prep data for script 7

- Refreshes data connection to populate worksheet from text file
- Finds the 2nd level 1 for each project and copies the project # and WBS # to another worksheet



	A	B	C	D
1	Appropriate project	WBS Element		Lev
5	IT-80026	IT800260000	Win	1
6	IT-80026	IT800262000		2
7	IT-80026	IT800263001		3
8	IT-80026	IT800263005	Store Network Infrastructure	3
9	IT-80026	IT800263006	Store Hardware	3
10	IT-80026	IT800263007	Store Deployment	3
11	IT-80026	IT800263008	Store Other	3
12	IT-80026	IT800262002	Distributi	2
13	IT-80026	IT800263017		3
14	IT-80026	IT800263018		3
15	IT-80026	IT800263019	DC Software	3
16	IT-80026	IT800263020	DC Facilities	3
17	IT-80026	IT800263021	DC Network Infrastructure	3
18	IT-80026	IT800263022	DC Hardware	3
19	IT-80026	IT800263023	DC Deployment	3
20	IT-80026	IT800263024	Distribution Center Other	3
21	IT-80026	IT800262003	Other Hard Capital	2
22	IT-80026	IT800263025	Other Servers	3
23	IT-80026	IT800263026	Other Storage	3
24	IT-80026	IT800263027	Other Software	3
25	IT-80026	IT800263028	Other Facilities	3
26	IT-80026	IT800263029	Other Network Infrastructure	3
27	IT-80026	IT800263030		3
28	IT-80026	IT800263031		3
29	IT-80026	IT800263032		3
30	IT-80026	IT800261900	Winshuttle Test- 080917 - CXH5037	1
31	IT-80026	IT800262900	TOTAL EXPENSE Level 2	2
32	IT-80026	IT800263901		3
33	IT-80026	IT800263902	TB	3
34	IT-80026	IT800263903		3
35	IT-80026	IT800263904	BD Cost Center 3	3
36	IT-80026	IT800263905	TBD Cost Center 4	3
37	IT-80026	IT800263906	TBD Cost Center 5	3
38	IT-80027	IT800270000	Winshuttle Test- 080917 - CXH5037	1
39	IT-80027	IT800272000	Store Hard Capital	2
40	IT-80027	IT800273001	Store Servers	3

Macro to prep data for script 7

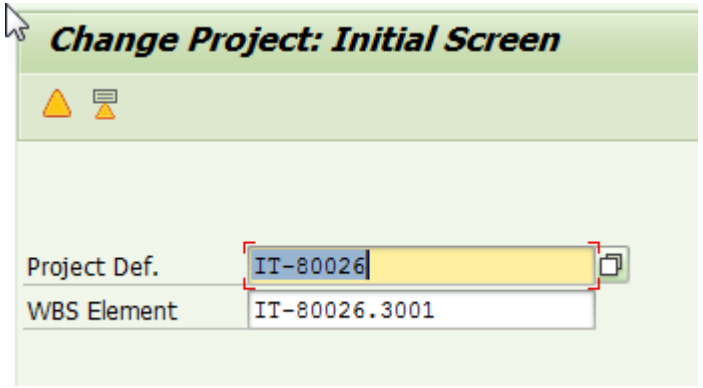
- Copies the Cost Center # in Cell C3 down for every row that was put on the worksheet.
- Data is prepped for Script 7

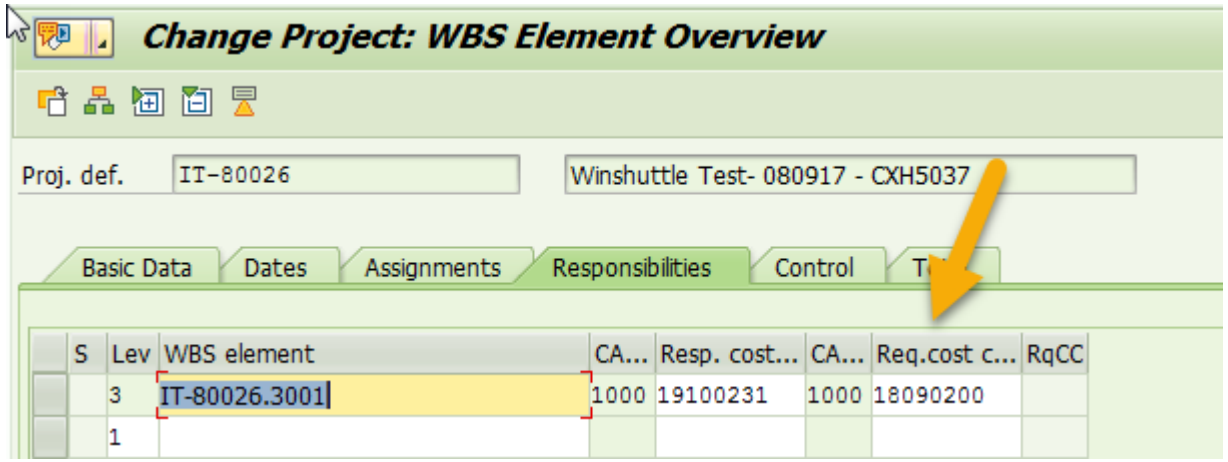
	A	B	C	D
1	Script 7	Script 7	Script 7	Log Winshuttle TRANSACTION 10.7 Hotfix 2 Script 7_CJ02.TxR 8/9/2017 2:01:00 PM Mode: Non-Batch without Controls QS1-500, cxh5037 Start Row: 3 End Row: 0 Number of Errors: 0
2	*PROJ-PSPID	*PRPS-POSID	Requesting cost center PRPS-AKSTL(01)	Log Winshuttle TRANSACTION 10.6 CJ02 - S6.TxR 10/5/2016 10:14:14 AM Mode: Non-Batch without Controls QS1-500, MPB7GY7
3	IT-80026	IT-80026.0000	18090200	Project IT-80026 is being changed
4	IT-80026	IT-80026.2000	18090200	Project IT-80026 is being changed
5	IT-80026	IT-80026.3001	18090200	Project IT-80026 is being changed
6	IT-80026	IT-80026.3005	18090200	Project IT-80026 is being changed
7	IT-80026	IT-80026.3006	18090200	Project IT-80026 is being changed
8	IT-80026	IT-80026.3007	18090200	Project IT-80026 is being changed
9	IT-80026	IT-80026.3008	18090200	Project IT-80026 is being changed
10	IT-80026	IT-80026.2002	18090200	Project IT-80026 is being changed
11	IT-80026	IT-80026.3017	18090200	Project IT-80026 is being changed
12	IT-80026	IT-80026.3018	18090200	Project IT-80026 is being changed

Script 7: Retrieve WBS elements

- Tcode: CJ02
- Mode: Non-batch without controls
- Number of Fields uploaded: 3+

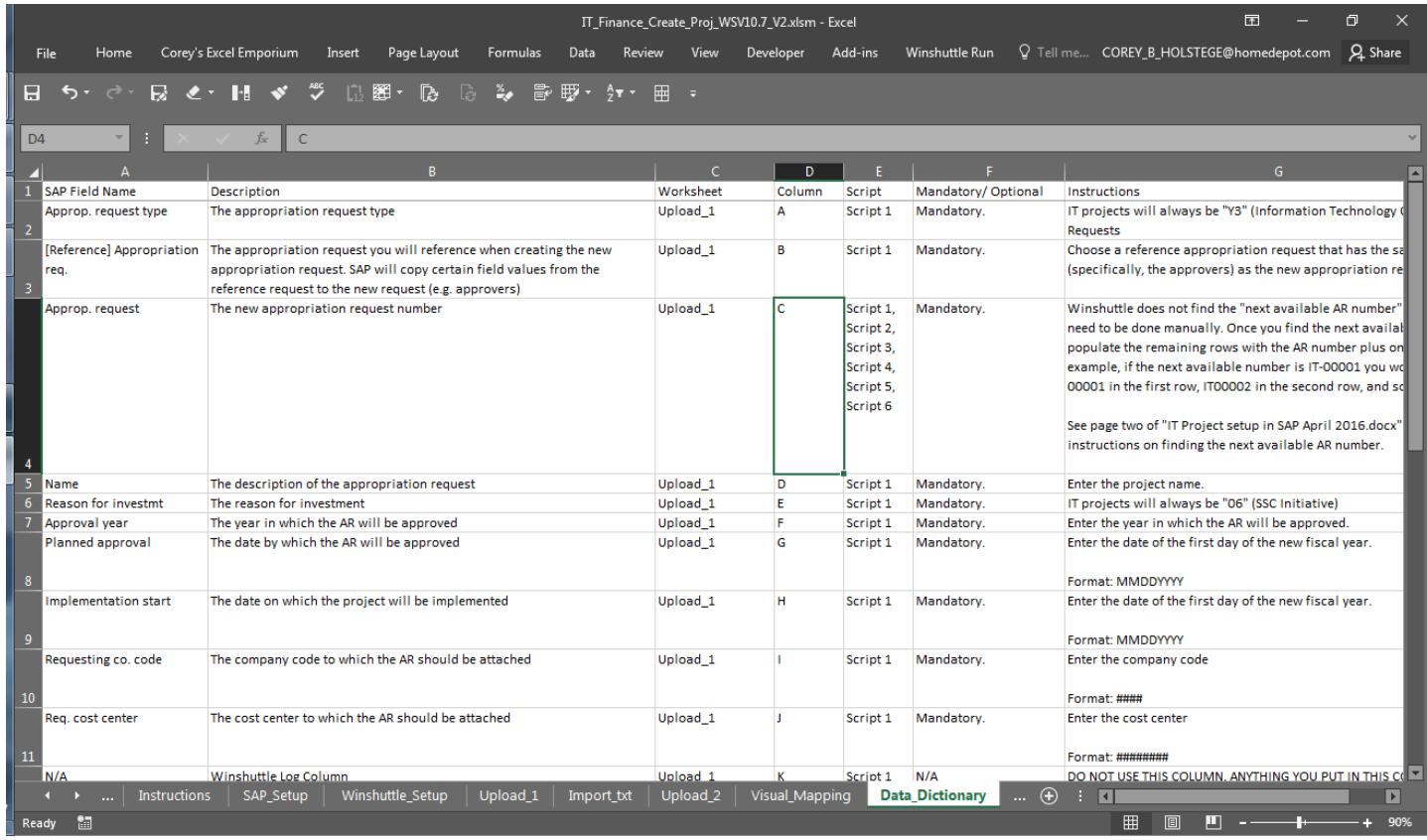
Sometimes you need to update items one by one.





Wrap it up in a bow

- Additional worksheets:
  - Index
  - Instructions
  - SAP Setup
  - Winshuttle Instructions
  - Visual Mapping
  - Data Dictionary



	A	B	C	D	E	F	G
1	SAP Field Name	Description	Worksheet	Column	Script	Mandatory/ Optional	Instructions
2	Approp. request type	The appropriation request type	Upload_1	A	Script 1	Mandatory.	IT projects will always be "Y3" (Information Technology Requests
3	[Reference] Appropriation req.	The appropriation request you will reference when creating the new appropriation request. SAP will copy certain field values from the reference request to the new request (e.g. approvers)	Upload_1	B	Script 1	Mandatory.	Choose a reference appropriation request that has the sa (specifically, the approvers) as the new appropriation re
4	Approp. request	The new appropriation request number	Upload_1	C	Script 1, Script 2, Script 3, Script 4, Script 5, Script 6	Mandatory.	Winshuttle does not find the "next available AR number" need to be done manually. Once you find the next availal populate the remaining rows with the AR number plus on example, if the next available number is IT-00001 you wo 00001 in the first row, IT00002 in the second row, and so See page two of "IT Project setup in SAP April 2016.docx" instructions on finding the next available AR number.
5	Name	The description of the appropriation request	Upload_1	D	Script 1	Mandatory.	Enter the project name.
6	Reason for investmt	The reason for investment	Upload_1	E	Script 1	Mandatory.	IT projects will always be "06" (SSC Initiative)
7	Approval year	The year in which the AR will be approved	Upload_1	F	Script 1	Mandatory.	Enter the year in which the AR will be approved.
8	Planned approval	The date by which the AR will be approved	Upload_1	G	Script 1	Mandatory.	Enter the date of the first day of the new fiscal year. Format: MMDDYYYY
9	Implementation start	The date on which the project will be implemented	Upload_1	H	Script 1	Mandatory.	Enter the date of the first day of the new fiscal year. Format: MMDDYYYY
10	Requesting co. code	The company code to which the AR should be attached	Upload_1	I	Script 1	Mandatory.	Enter the company code Format: ####
11	Req. cost center	The cost center to which the AR should be attached	Upload_1	J	Script 1	Mandatory.	Enter the cost center Format: ########
	N/A	Winshuttle Log Column	Upload_1	K	Script 1	N/A	DO NOT USE THIS COLUMN. ANYTHING YOU PUT IN THIS C

Results

- Manually: approximately 5+ minutes per project
- Solution: approximately 2 minutes per project
- Allows the user to multi-task while the scripts are executing, improving productivity
- Improves accuracy of data entry

Lessons Learned

- Understand the business process that you are scripting
- Partner with IT
- Ensure that all Tcodes your scripts use are assigned to an SAP role in Production
- Ensure the Associate has access to all Tcodes that need to be utilized
- You can map multiple SAP fields, from multiple Scripts, to the same Column in Excel
- There are many ways to do the same thing in ECC
- As simple as possible, as complex as necessary
- It will always take longer than you planned
- Sometimes you have to scrap a script
- Communication
- You can upload attachments!

What's next

- Transition to Studio
- Continue to refine the current scripts
- Expand the solution to other departments

Thank you
Remember to complete your session evaluation!
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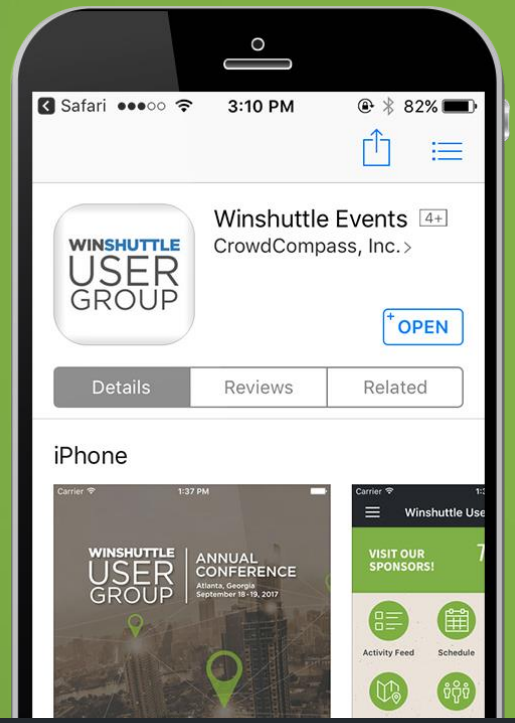
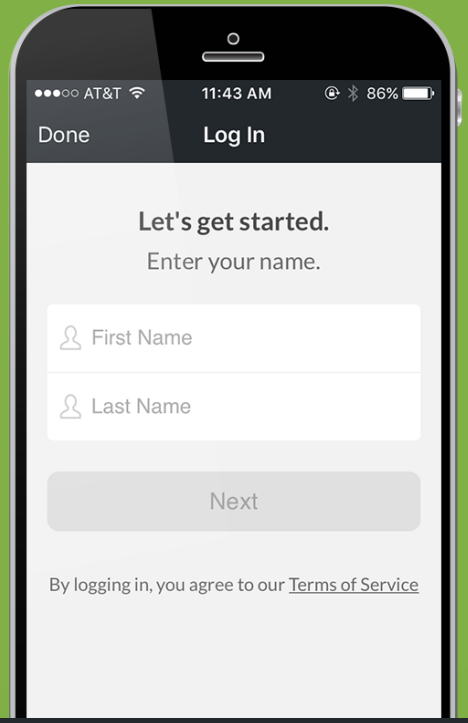
ANNUAL
CONFERENCE
ATLANTA 2017

Download & login to the WUG app!

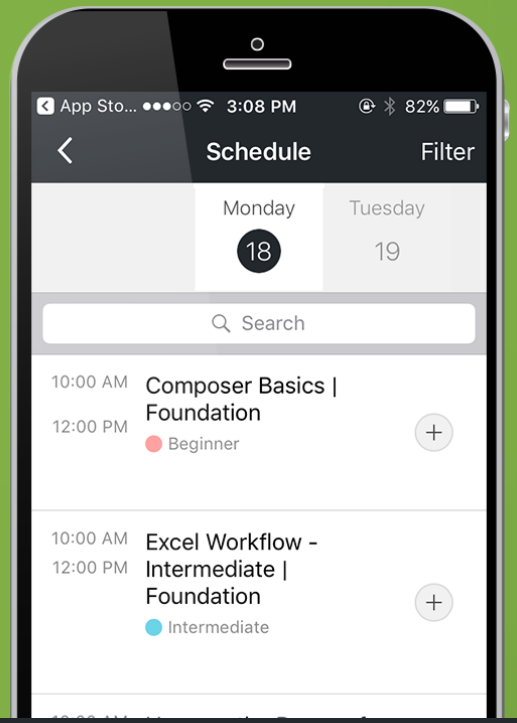
Download from the AppStore or Google Play

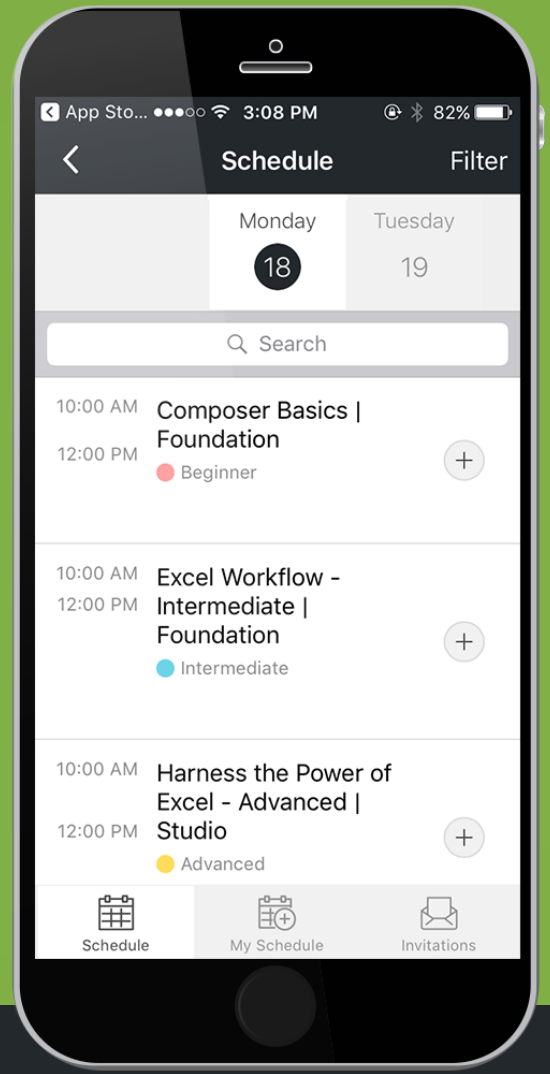
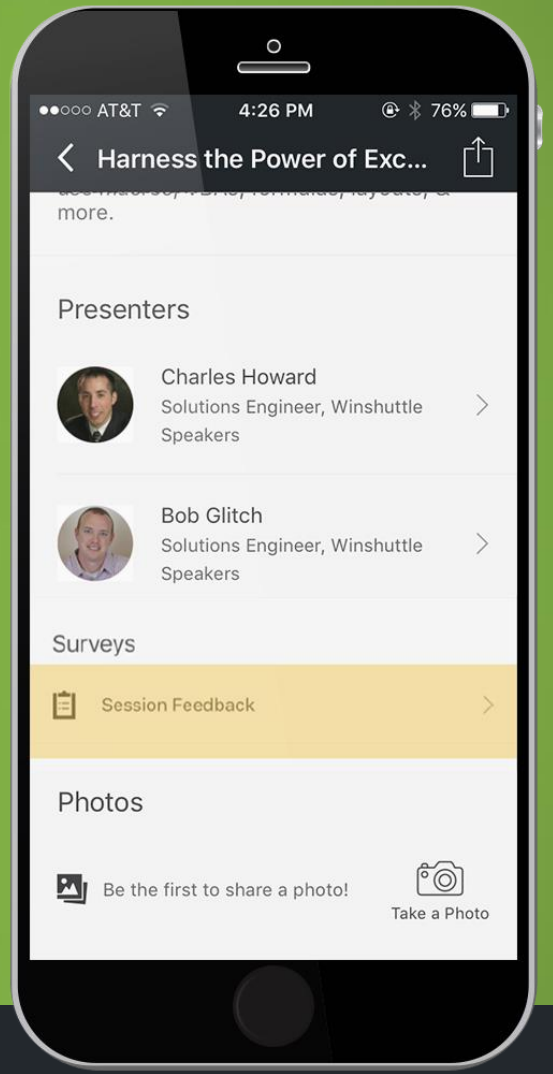


Click the menu icon & select Login for more features



Find sessions, build a schedule, network & more!



Have questions? Ask a Winshuttle team member!

Remember to complete the session survey!