ExampTo Insight

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English

ExampTo Insight Application

Configuration Guide

v.0.7

EMT

Brand Solutions

Revision History

Version	Date	Description	Author
0.1	05.04.2012	Document created	Olena Derzhko
0.2.	12.04.2012	*Section 10.18. Create Service Point as Architectural Object Type* added. *Section 11. Mapping for CAD in SAP* edited. Some attributes were changed, added.	Olena Derzhko
0.3	19.04.2012	*Section 2. Flexible Real Estate Management (RE-FX)* added. *Section 3. ExampTo Insight Central Settings* added.‘ *Section 12.17 Configuration of Reservation Module* changed. *Section 5.4. Define Work Order Email Sending changed.* *Section 4.5. Central Settings for Incident Processing changed.* *Section 5.6. Central Settings for Work Order Processing* chnaged.	Olena Derzhko
0.4	26.04.2012	*The following sections were added:* *14. Master Data: Measurement.* *15. Conditions and Flows* *16. Accounting: Define Posting Activities*	Olena Derzhko
0.5	9.05.2012	*Corrections made after Bert’s comments.*	Olena Derzhko
0.6	17.05.2012	*Structure of the document changed according to logical workflow for configuration required for FM Isnight proper functioning.*	Olena Derzhko
0.7	06.06.2012	*The following sections were added:* *2.2.4. Define BP Roles Groupings* *2.2.5. Define BP Roles*	Olena Derzhko

Icons

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1. ExampTo Insight: Configuration Guide

1.1. Purpose

This configuration guide provides the information for Configuration Manager of ExampTo Insight application to configure SAP settings according to the business need.

1.2. Scope

The document scope comprises the following main sections describing a required SAP configuration for:

1. Initial Settings, required as prerequisite for proper functioning of all the ExampTo Insight modules, including basic settings, basic activation etc.
2. Configuration for ExampTo Insight modules:
   - Reservations
   - Incidents
   - Work Orders
   - Space Management
   - Reporting

The values for configuration settings are provided in exemplification of trial configuration, while during real configuration process the data should be actual and entered according to the current project need.

1.3. Target Audience

The target audience of this guide is Configuration Managers who have appropriate rights in SAP system and approproite skills and competence to perform the configuration described further in the document.

2. Initial Settings

2.1. Basic Settings

2.1.1. Activate Real Estate Extension

Procedure

1. Access the activity using the following navigation options:

Transaction Code	**SPRO**
IMG Menu	*SAP Customizing Implementation Guide → Flexible Real Estate Management (RE-FX)→ Basic Settings → Activate Real Estate Extention*

2. On the *Change View "Central Customizing for ExampTo Insight product": Details* screen, make sure the entries are as follows:

Financil Extes. (EA-FIN) Active	checked
BTE Application (RE) Active	checked

3. In the *"Activate Real Estate Extension" section* make the following entries:

Extensive Active	checked

4. Save your entries.

The activation of the mentioned indicators allows using the functions of Flexible Real Estate Management.

2.1.2. Activate Subfunction

Procedure

1. Access the activity using the following navigation options:

Transaction Code	**SPRO**
IMG Menu	*SAP Customizing Implementation Guide → Flexible Real Estate Management (RE-FX)→ Basic Settings → Activate Subfunction*

2. On the *Change View "Activation of(Sub)application for RE-FX": Overview* screen, make the following entries:

Appl.	Application name	Actv.
AJCE	Cost Efficiency Analysis	
CD01	UI for Retroactive Changes	
CDSP	Condition Split	checked
C001	CO Integration Enhancements	checked
GI01	Graphical Integration	checked
LUM	Land Use Management (DE)	checked
ORPO	Seating/Move Planning	checked
ORRS	Room Reservations	checked
SC01	SC Settlement Enhancement	checked
SCAL	Accural/Def. Of Service Chgs	checked
TRCM	Cash management and Forecast	checked
XX01	Other Addit. Functions in EhP2	checked

3. Save your entries.

The activation of the mentioned subfunctions of the Flexible Real Estate Management makes them visible on the user interface and its transactions and reports can be executed directly.

2.1.3. Make Basic Settings in Company Code

Procedure

1. Access the activity using the following navigation options:

Transaction Code	**SPRO**
IMG Menu	*SAP Customizing Implementation Guide → Flexible Real Estate Management (RE-FX)→ Basic Settings → Make Basic Settings in Company Code*

2. On the *Change View "Company-Code-Dependent Settings": Overview* screen, using the *'New Entries'* button, make the following entries:

CoCd	CCTp	Accounting System	Company Code Opts
NL01	Standard Company Code	FI	

3. Save your entries.

2.1.4. Activate Real Estate Management in Controlling Area

Procedure

1. Access the activity using the following navigation options:

Transaction Code	**SPRO**
IMG Menu	*SAP Customizing Implementation Guide → Flexible Real Estate Management (RE-FX)→ Basic Settings → Activate Real Estate management in Controlling Area*

2. On the *Change View "Company-Code-Dependent Settings": Overview* screen, using the *'New Entries'* button, make sure there is the following entries present in the table:

COAr	Name
FMI00	ExampTo Insight

3. Select the record and double-click the *Active component/control indicators* option in left-side menu.
4. On the *Display View "Activate components/control indicators" Details* screen, make sure the following entries are present in the table:

Controlling Area	**FMI00 ExampTo Insight**
Fiscal Year	*2012 to 9999*
Activate Components	
Cost Centres	*Component active*
Order Management	*Component active*
Commit. Management	*Component active*
ProfitAnalysis	*Component not active*
Acty-Based Costing	*Component Active for Parallel and Integrated Calculation*
Profit Center Acctg	*checked*
Projects	*checked*
Sales Orders	*checked*
W. Commit. Mgt	*checked*
Cost Objects	*checked*
Real Estate Mgmt	*checked*
Other Indicators	
All Currencies	*checked*
Variances	*checked*
CoCd Validation	*checked*

Alternative Authorization Hierarchies for Profit Centres	
Alternat. Hier.1	*0001*
Alternat. Hier.2	
Alternative Authorization Hierarchies for Profit Centres	
Alternat. Hier.1	*0001*
Alternat. Hier.2	

5. Double-click the *Assignment of company code(s)* option in left-side menu.
6. Make sure there are the following entries are present in the *'Assigned Company Codes'* table:

COAr	Name
FMI00	**ExampTo Insight**

2.2. Business Partner

2.2.1. Activate Time-Dependent Data for Business Partner

Procedure

1. Access the activity using the following navigation options:

Transaction Code	`SPRO`
IMG Menu	*SAP Customizing Implementation Guide → Flexible Real Estate Management (RE-FX) → Business Partner → General Settings for Business Partner → Activation Switch for Functions*

2. On the *Change View "Activation Status for Function" Overview* screen, enter required records, like shown in the table below:

Development	Active	Description
BUT000		Time Dependency BP Central Data (Table BUT000)
BUT020	checked	Time Dependency BP Addresses
BUT0BK	checked	Time Dependency BP Bank Data
BUT100	checked	Time Dependency BP Roles
IBANONLY		Time Dependency BP Roles

3. Save your entries.

2.2.2. Define Groupings and Assign Number Ranges

1. Access the activity using the following navigation options:

Transaction Code	`SPRO`
IMG Menu	*SAP Customizing Implementation Guide → Flexible Real Estate Management (RE-FX) → Business Partner → Basic Settings → Number Range and Groupings → Define Groupings and Assign Number Ranges*

2. By using the *New Entry* button, enter required records, like shown in the table below:

Grouping	Short name	Description	Number ra
IMMO	Real Estate	Real Estate Partner (I)	01

3. Save your entries.

2.2.3. Create Name Format

1. Access the activity using the following navigation options:

Transaction Code	`SA13`

2. By using the *New Entry* button on Change View “name formats”: Overview screen, enter required records, like shown in the table below:

Cty	Format
DE	01
DE	02
US	01
NL	01

3. In the Name Formats table, select *NL 01, and double-click the Name format field option in the left menu.*

4. By using the *New Entry* button on Change View *“Name Formats Field”* table, enter required records, like shown in the table below:

Pos.	Field Name
1	TITLE Form of Address
2	NAME_FIRST First Name
3	INITIALS “Middle Initial or”
4	NAME_LAST Last Name

5	TITLE_ACA1 Academic Title

5. Save your entries.

2.2.4. Define BP Roles Groupings

Procedure

1. Access the activity using the following navigation options:

Transaction Code	**SPRO**
IMG Menu	*SAP Customizing Implementation Guide → Flexible Real Estate Management (RE-FX) → Business Partner → General Settings for Business Partner → Business Partner Roles → Define BP Roles Groupings*

2. On the *Change View “BP Roles Groupings”: Overview* screen,
3. By using the *New Entry* button on Change View *“BP Roles Groupings”: Overview* screen, enter the following values, like shown in the ‘BP Role Groupings’ table below:

Role Groupings	Title	Description
BKK001	Bank Customer - Private	Bank Customer - Private
BKK002	Bank Customer - Company	Bank Customer - Company
BKK003	Employee	Employee

4. Select the *BKK003* value in a table, and double-click the *BP Role Groupings -- > BO Roles* option in the Dialog Structure tree, by using the *New Entry* button on Change View *“BP Roles Groupings”: Overview* screen, enter the following values, like shown in the ‘*BP Role Groupings -- > BO Roles*’ table below:

BP Role	Title
BUP003	Employee
TR0813	Occupant

5. Save your entries.

2.2.5. Define BP Roles

Procedure

1. Access the activity using the following navigation options:

Transaction Code	**SPRO**
IMG Menu	*SAP Customizing Implementation Guide → Flexible Real Estate Management (RE-FX) → Business Partner → Relevant Settings for Business Partner in RE Context → Business Partner Roles → Define BP Roles*

2. On the *Change View "BP Roles": Overview* screen,
3. By using the *New Entry* button on Change View *"BP Roles": Overview* screen, enter the following values, like shown in the table below:

BP Roles	Title	Description
TR0813	Occupant	Reservation Occupier/desks

4. Double-click *TR0813* row in the "BP Roles" table, make sure the values are as shown in the table below:

<table>
<tr><td>BP Role Cat.</td><td colspan="2">TR0813</td></tr>
<tr><td colspan="3">BP Role Categories</td></tr>
<tr><td>Title</td><td colspan="2">Room Occupant</td></tr>
<tr><td>Description</td><td colspan="2">Room Occupant</td></tr>
<tr><td>Hide</td><td colspan="2"></td></tr>
<tr><td colspan="3">BP Role Category</td></tr>
<tr><td>BP Role Cat.</td><td>TR0813</td><td>Room Occupant</td></tr>
<tr><td>checked</td><td colspan="2">Stud Assignment BP Roles -- > BP Role Cat.</td></tr>
</table>

5. Click *BP Role Category -->Business Transaction* option in Dialog Structure tree, by using the *New Entry* button on Change View *"BP Role Category -->Business Transaction": Overview* screen, enter the following values, like shown in the table below:

Brans	Text	Modify. Indicator
BPUS	Business Partner Usage	Transaction Allowed

6. Save your entries.

FUNC	AO Function	AO Function	checked	ROL	Property is Not Allowed for Object	1 Property is Allowed for Object

1. Save your entries.