



**SAP User Manual for Preventive Maintenance Plan Creation and
Scheduling**

**Indian Ports Association (IPA)
Implementation of Port EBS Project
Enterprise Business System**

**Business Process Manual for
Preventive Maintenance Plan Creation &
Scheduling**

Submitted by:

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SAP User Manual for Preventive Maintenance Plan Creation and Scheduling

This document is a desk reference tailored to the Maintenance Specialists. It is intended to provide information that will be helpful to support the Maintenance processes.

Document History:

Authors & Participants	
Role	Name

Revision History			
Date	Document Version	Document Revision Description	Author
01.11.2019	1.0	Initial Draft	



SAP User Manual for Preventive Maintenance Plan Creation and Scheduling

Reviewed and Approved By			
Name	Title	Date	Approved



SAP User Manual for Preventive Maintenance Plan Creation and Scheduling

In this chapter we are going to learn about how Master Data transactions will be handled in SAP system. Strategy Plan Creation & Scheduling is covered in this business process manual document.

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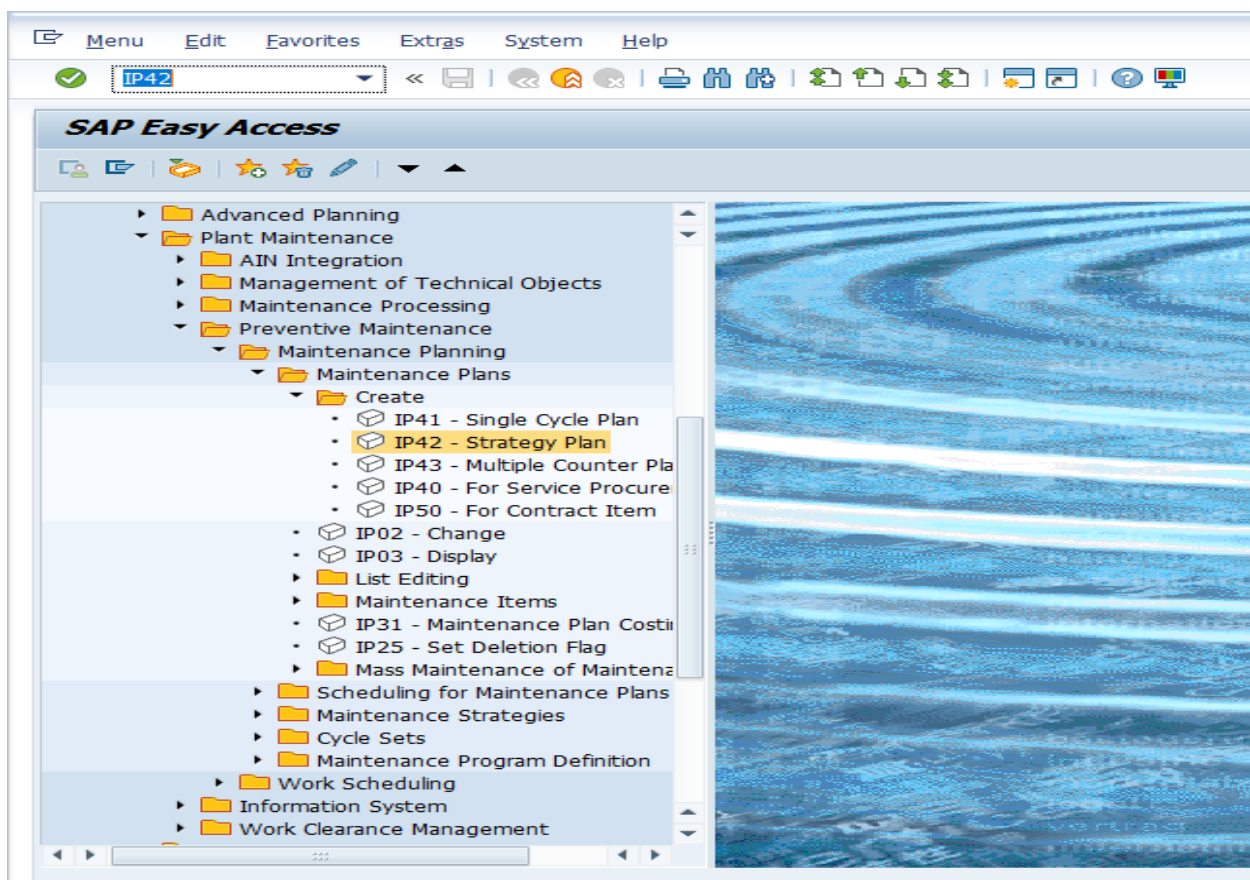
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Creation of Preventive Maintenance Plan

The below transaction code which we can use for creation of Equipment

Step 1: Enter Transaction code IP42 or IP01 in command bar (or) Follow the below navigation path



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Step 2: Double click on “IP42” the system will open the below screen

In the next screen

Create Maintenance Plan: Initial

Maintenance plan

Maint. plan cat.

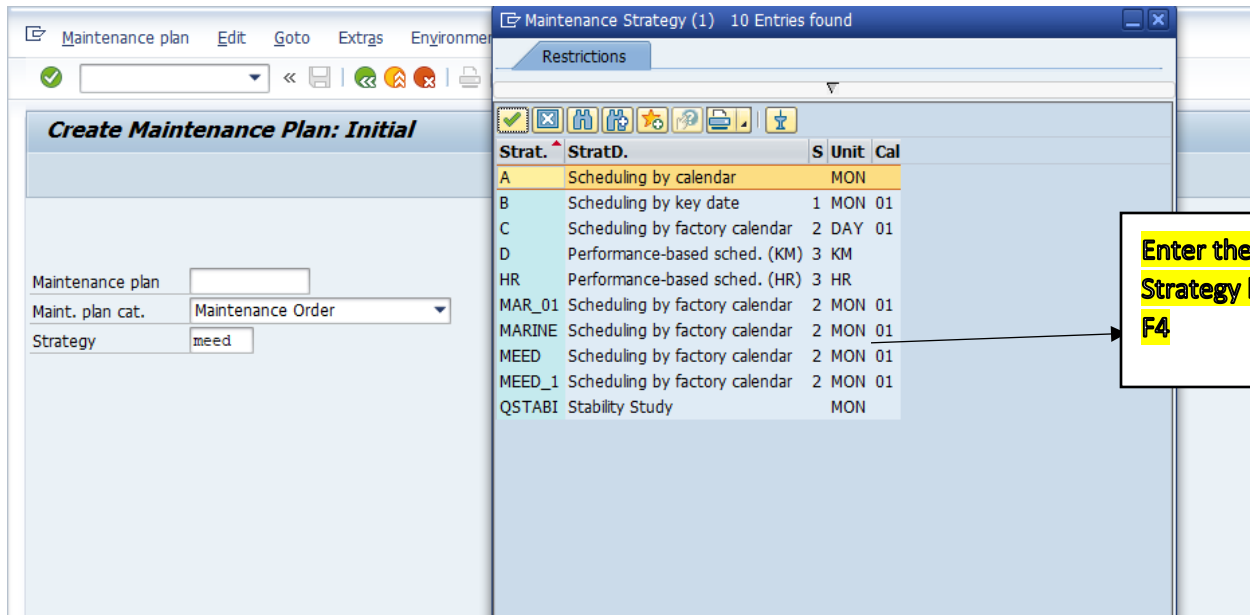
Strategy

Enter the Maintenance Plan Category & Strategy

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Step3:

Select the Maintenance Plan Category & Strategy by Pressing F4 & Press "Enter"



The screenshot shows the SAP 'Create Maintenance Plan: Initial' screen. On the left, there are input fields for 'Maintenance plan', 'Maint. plan cat.' (set to 'Maintenance Order'), and 'Strategy' (set to 'meed'). On the right, a 'Maintenance Strategy (1) 10 Entries found' dialog box is open, displaying a table of strategies. A callout box with an arrow points to the 'MEED' entry in the table, containing the text 'Enter the Strategy by Press F4'.

Strat.	StratD.	S	Unit	Cal
A	Scheduling by calendar		MON	
B	Scheduling by key date	1	MON	01
C	Scheduling by factory calendar	2	DAY	01
D	Performance-based sched. (KM)	3	KM	
HR	Performance-based sched. (HR)	3	HR	
MAR_01	Scheduling by factory calendar	2	MON	01
MARINE	Scheduling by factory calendar	2	MON	01
MEED	Scheduling by factory calendar	2	MON	01
MEED_1	Scheduling by factory calendar	2	MON	01
QSTABI	Stability Study		MON	



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Step4:

After Pressing “Enter” system will open the below Screen for capturing Maintenance Item Data

Create Maintenance Plan: Strategy plan

Maintenance plan

Maint. plan hea...

Maintenance plan cycle 28.01.2021 Maintenance plan scheduling parameters Maintenance plan additional data

Cycles

Cycle	Unit	Maintenance cycle text	Offset

Item Object list item Item location Cycle item 28.01.2021

Maintenance Item

Reference object

Functional loc.

Equipment

Assembly

Planning Data

Planning Plant Maint. Planner Group

Order Type MaintActivityType

SAP

Enter the Maintenance Plan Data

Enter the Maintenance Item Data



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Step 5:

Select the Maintenance item Details & Press “Enter”

Maintenance plan Maintenance plan

Maint. plan hea...

Maintenance plan cycle 28.01.2021 Maintenance plan scheduling parameters Maintenance plan additional data

Cycle	Unit	Maintenance cycle text	Offset

Item Object list item Item location Cycle item 28.01.2021

Maintenance Item Pump Preventive plan

Reference object

Functional loc.

Equipment

Assembly

Planning Data

Planning Plant Maint. Planner Group

Order Type MaintActivityType



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Maintenance item related details will updated in Plan screen

Maintenance plan Edit Goto Extras Environment System Help

Create Maintenance Plan: Strategy plan

Item Object list item Item location Cycle item 28.01.2021

Maintenance Item

Reference object

Functional loc.	<input type="text" value="1100-CD02-BLDG-HO..."/>	Main Hospital Building Air Conditioner
Equipment	<input type="text" value="10005155"/>	AC-174
Assembly	<input type="text"/>	

Planning Data

Planning Plant	<input type="text" value="1100"/> Chennai Port Trust	Maint. Planner Group	<input type="text" value="107"/> MEED
Order Type	<input type="text" value="ZM01"/> Preventive Maintenance	MaintActivityType	<input type="text"/>
Main WorkCtr	<input type="text" value="MEED_ELE"/> / <input type="text" value="1100"/> MEED Electrical	Business Area	<input type="text"/>
Priority	<input type="text"/>	Settlement Rule	<input type="text"/>
Sales Document	<input type="text"/>		

Task List

Typ	Task LstGrp	GrpCr	Description
A	<input type="text" value="134"/>	<input type="text" value="1"/>	AC Servicing

Select the General Task list



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Step 6:

Enter Call Horizon and Scheduling period, Object List details in below Screen

Maintenance plan scheduling parameters

Call horizon: 80 %

Scheduling period: 2 YR

Scheduling indicator: Time - factory caldr

Sort	Serial Num...	Material	Material description

Enter the Scheduling period for Plan & Call Horizon for Triggering

Enter Details for Object list items for same plan



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Step 7:

Enter the start of cycle date in below screen

Maintenance plan: Maintenance plan AC

Maint. plan hea...

Maintenance plan cycle 28.01.2021 | Maintenance plan scheduling parameters | Maintenance plan additional data

Date determination		Call control parameter		Scheduling indicator	
Shift Factor Late Compl.	100 %	Call horizon	80 %	<input type="radio"/> Time	
Tolerance (+)		Scheduling period	2 YR	<input type="radio"/> Time - key date	
Shift Factor Early Compl.	100 %	Completion Requirmnt	<input type="checkbox"/>	<input checked="" type="radio"/> Time - factory caldr	
Tolerance (-)		Start scheduling			
Cycle modification factor	1.00	Start of cycle: 28.01.2021			
Factory calendar	01				

Item | Object list item | Item location | Cycle item 28.01.2021

Maintenance Item: AC Preventive plan

Sort	Serial Num...	Material	Material description

Enter the Start Date for the plan



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Step 8:

Check the Maintenance plan Details and press "Save" Icon

Maintenance plan

Maint. plan hea...

Maintenance plan cycle 28.01.2021 | Maintenance plan scheduling parameters | Maintenance plan additional data

Cycles			
Cycle	Unit	Maintenance cycle text	Offset
	1 MON	30-days	0
	6 MON	180-days	0
	12 MON	360-days	0

Item | Object list item | Item location | Cycle item 28.01.2021

Maintenance Item

Reference object

Functional loc. Main Hospital Building Air Conditioner
Equipment AC-174
Assembly

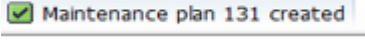
Planning Data

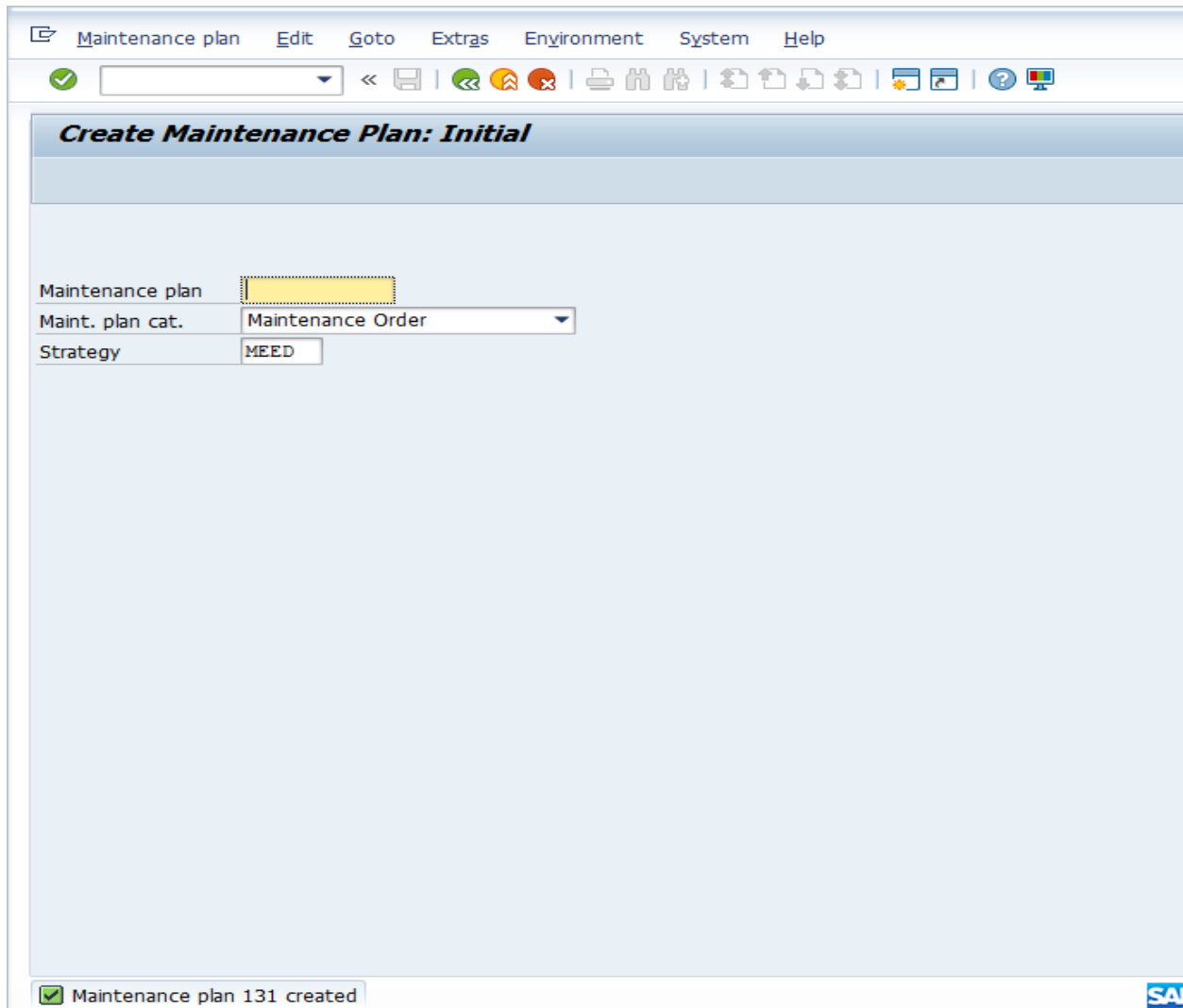
Planning Plant Chennai Port Trust | Maint. Planner Group MEED
Order Type Preventive Maintenance | MaintActivityType



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Step 9:

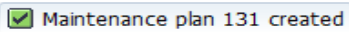
Once Plan is saved system propose below message”  ”



Maintenance plan

Maint. plan cat. Maintenance Order

Strategy MEED



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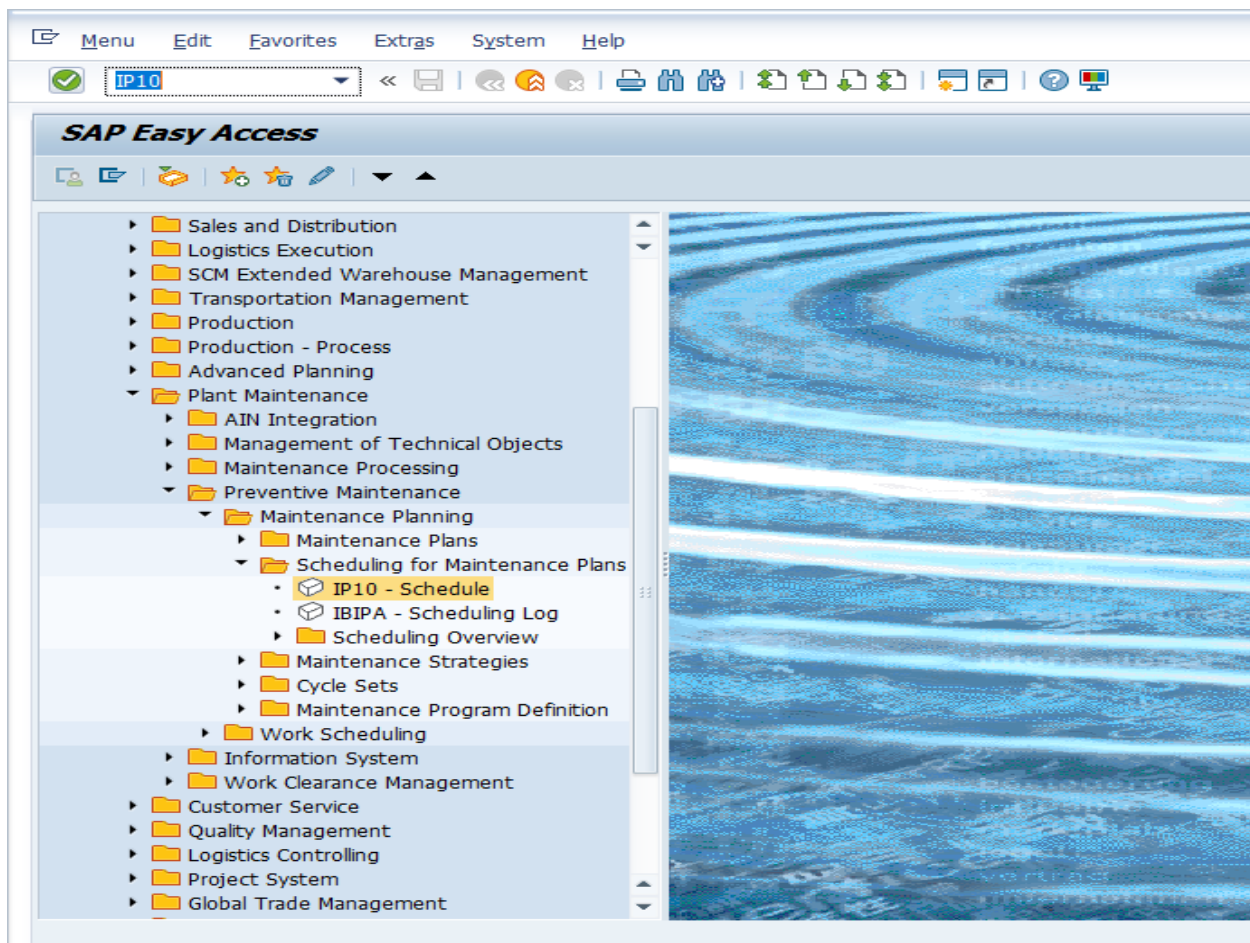


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Scheduling of Maintenance Plan

The below transaction code which we can use for creation of Equipment

Step 1: Enter Transaction code IP42 or IP01 in command bar (or) Follow the below navigation path

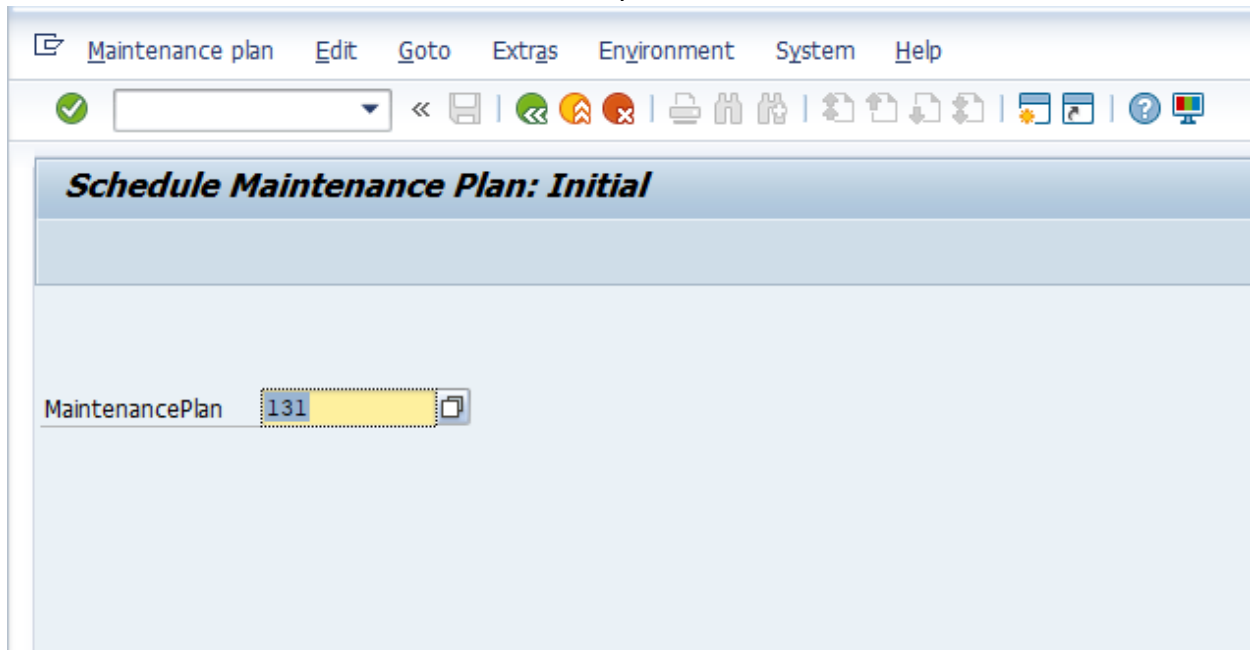




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Step 1:

Select the Maintenance Plan to be scheduled by F4 Selection

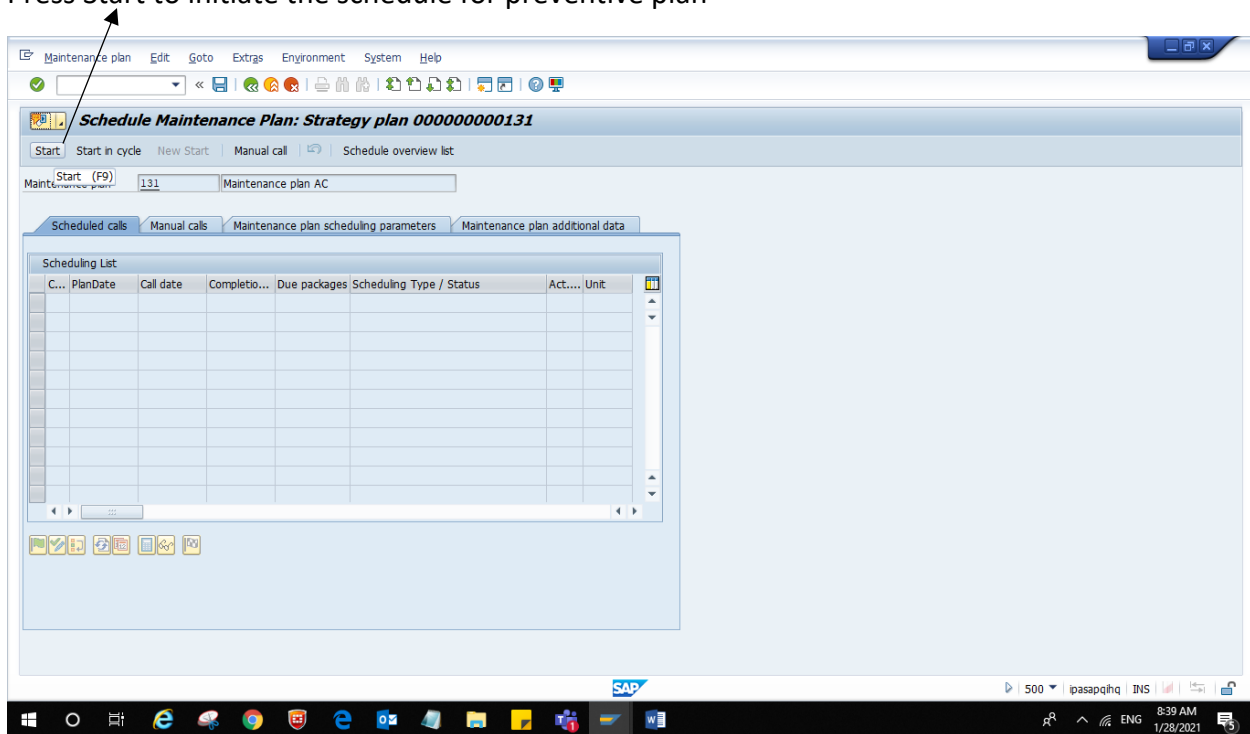




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Step 2:


Press Start to initiate the schedule for preventive plan

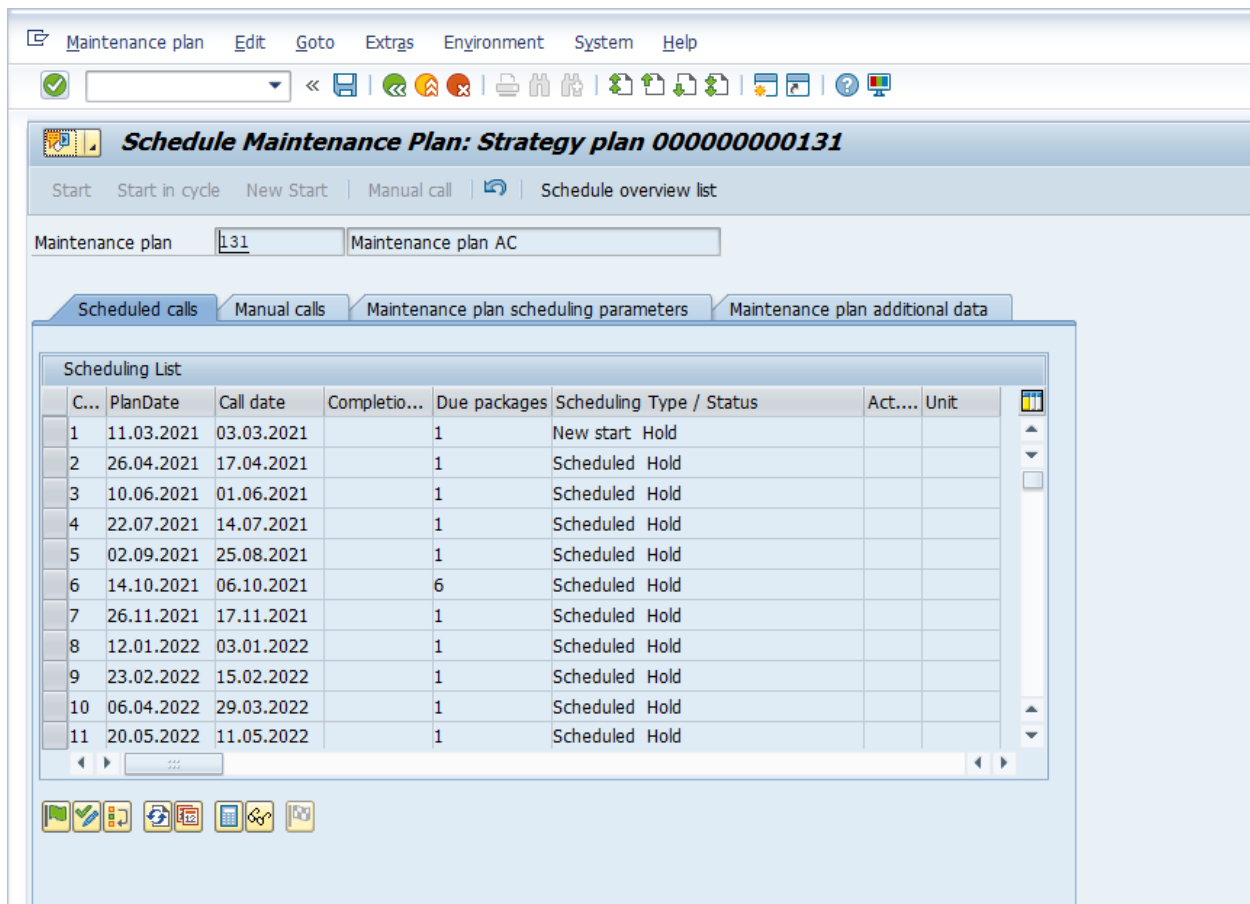




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Step 3:

Maintenance Plan Scheduled as per Strategy”  Maintenance plan 131 scheduled ”



The screenshot shows the SAP Scheduling List for Maintenance Plan 131. The interface includes a menu bar (Maintenance plan, Edit, Goto, Extras, Environment, System, Help), a toolbar with various icons, and a title bar for 'Schedule Maintenance Plan: Strategy plan 000000000131'. Below the title bar, there are tabs for 'Scheduled calls', 'Manual calls', 'Maintenance plan scheduling parameters', and 'Maintenance plan additional data'. The 'Scheduled calls' tab is active, displaying a table with the following data:

C...	PlanDate	Call date	Completi...	Due packages	Scheduling Type / Status	Act....	Unit
1	11.03.2021	03.03.2021		1	New start Hold		
2	26.04.2021	17.04.2021		1	Scheduled Hold		
3	10.06.2021	01.06.2021		1	Scheduled Hold		
4	22.07.2021	14.07.2021		1	Scheduled Hold		
5	02.09.2021	25.08.2021		1	Scheduled Hold		
6	14.10.2021	06.10.2021		6	Scheduled Hold		
7	26.11.2021	17.11.2021		1	Scheduled Hold		
8	12.01.2022	03.01.2022		1	Scheduled Hold		
9	23.02.2022	15.02.2022		1	Scheduled Hold		
10	06.04.2022	29.03.2022		1	Scheduled Hold		
11	20.05.2022	11.05.2022		1	Scheduled Hold		



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