



**SAP User Manual for Calibration/Statutory/Survey Maintenance**

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

**Business Process Manual for  
Calibration/Statutory/Survey Maintenance**

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## SAP User Manual for Calibration/Statutory/Survey Maintenance

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			
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20.07.2020	1.0	Initial Draft	Sabariayyappan Balasubramaniyan, Mona Pal



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Reviewed and Approved By			
Name	Title	Date	Approved

### Introduction:

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## SAP User Manual for Calibration/Statutory/Survey Maintenance

The purpose of the document is to give awareness of the complete cycle of how the Calibration/Statutory/Survey Maintenance Process Handled in S4H (SAP) to the respective users.

### Summary:

In this chapter, we are going to learn about how Calibration/Statutory/Survey Maintenance transactions will be handled in SAP system. Equipment/Asset Planned maintenance is covered in this business process manual document.

Its starts right from Maintenance Order, material PR, Service PR up to maintenance order closure.

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### Creation of Maintenance Plan:

## SAP User Manual for Calibration/Statutory/Survey Maintenance

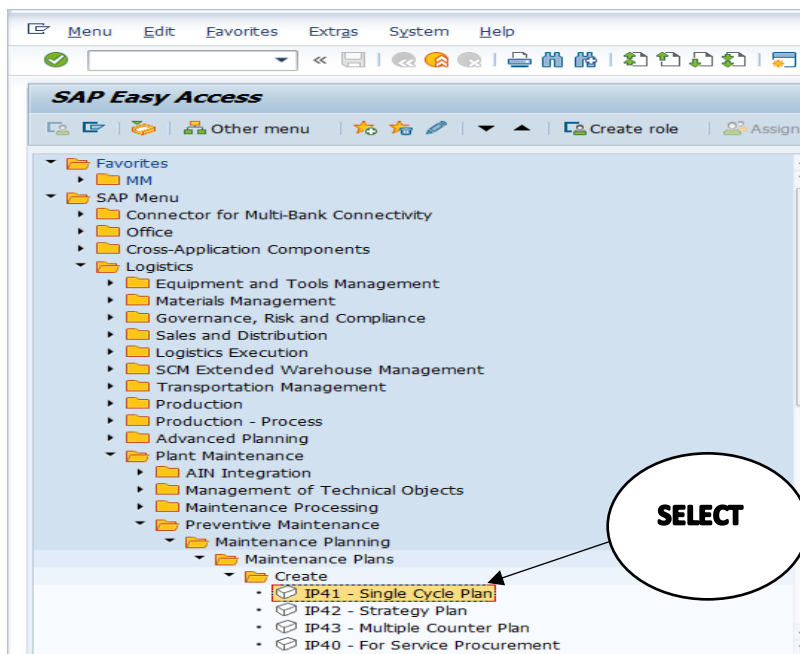
The below transaction code which we can use for creation of Maintenance Plan for Calibration/Statutory/Survey Maintenance Activity, this will be one time activity for coming years for functional location/equipment/Asset for planned Maintenance.

**Step 1:** Enter Transaction code IP41 in command bar (or) Follow the below navigation path Double click on “IP41” the system will open the below screen

In the next screen, enter the required details as below

### Under Initial Screen:

Maintenance Plan Category (PM Maintenance Order) press enter key to proceed





## SAP User Manual for Calibration/Statutory/Survey Maintenance

Maintenance plan

Maint. plan cat. Maintenance Order

Enter Description of Maintenance plan, Cycle Unit, Functional Location & Object list for proceed further. Shown below.

Maintenance plan Cal/Stat/Survey Maint

Maint. plan hea...

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

Cycle/Unit 1 yr

Cycle text

Offset/Unit

Counter

Enter the Item Details ie Equipment/ Functional Location Details and Maintenance Text and Press Enter





## SAP User Manual for Calibration/Statutory/Survey Maintenance

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

Cycle/Unit:  yr

Cycle text:

Offset/Unit:

Counter:

Item | Object list item | Item location

Maintenance Item:

Reference object

Functional loc.:






Equipment:



## SAP User Manual for Calibration/Statutory/Survey Maintenance

The other details from the equipment copied over the Planning Data and Location Details

Item Object list item Item location

Maintenance Item  Cal/Stat/Survey Maint     




Reference object

Functional loc.  Kala Chowkey

Equipment  5 HP Pumping Set No. 1

Assembly

Planning Data

Planning Plant	<input type="text" value="1000"/> Mumbai Port Trust	Maint. Planner Group	<input type="text" value="107"/> MEED
Order Type	<input type="text" value="ZM03"/> Calibration/Statutory/Survey Mai...	MaintActivityType	<input type="text"/>
Main WorkCtr	<input type="text" value="PM_CME"/> / <input type="text" value="1000"/> PM CME Departme...	Business Area	<input type="text"/>
Priority	<input type="text"/>	Settlement Rule	  
Sales Document	<input type="text"/> / <input type="text"/>		

Item Object list item Item location

Maintenance Item  Cal/Stat/Survey Maint

Location data

MaintPlant	<input type="text" value="1000"/> Mumbai Port Trust
Location	<input type="text"/>
Room	<input type="text"/>
Plant Section	<input type="text"/>
Work Center	<input type="text"/>
ABC Indicator	<input type="text" value="B"/> Medium
Sort Field	<input type="text"/>

Account assignment

Company Code	<input type="text" value="1000"/> Mumbai Port Trust	Mumbai
Asset	<input type="text"/>	
Business Area	<input type="text"/>	
Cost Center	<input type="text" value="10050401"/> Material Mgt Div-Gen	CO Area <input type="text" value="1000"/>
WBS Element	<input type="text"/>	Settlement Rule <input type="text"/>

go to next tab at header level to fill the details of Call Horizon,Scheduling Period and Start date of Maintenance Plan.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

**Create Maintenance Plan: Single cycle plan**

Maintenance plan

Maint. plan hea...

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

Date determination		Call control parameter		Scheduling indicator	
Shift Factor Late Compl.	<input type="text"/>	Call horizon	80 %	<input checked="" type="radio"/> Time	
Tolerance (+)	<input type="text"/>	Scheduling period	10 YR	<input type="radio"/> Time - key date	
Shift Factor Early Compl.	<input type="text"/>	Completion Requirement	<input type="checkbox"/>	<input type="radio"/> Time - factory caldr	
Tolerance (-)	<input type="text"/>				
Cycle modification factor	1,00				
Factory calendar	<input type="checkbox"/>				

Start scheduling

Start of cycle

After that click on save button, on the bottom you will get the msg after save with Maintenance Plan

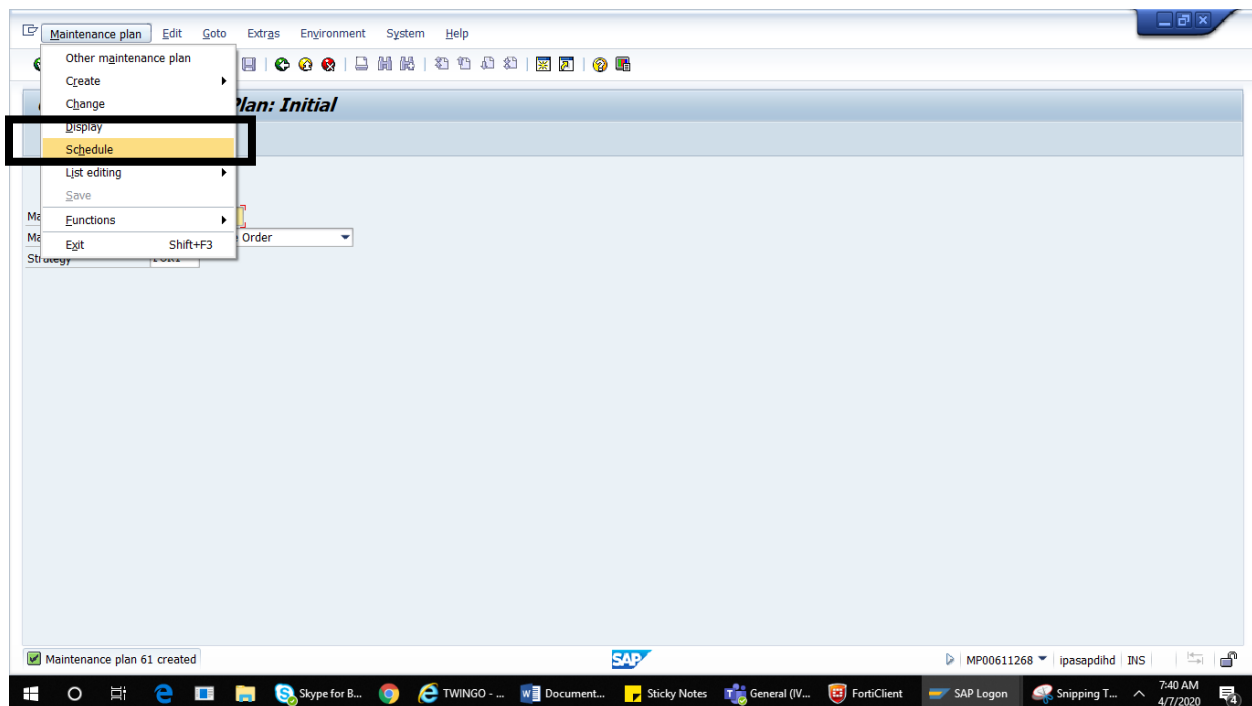
Number.

## SAP User Manual for Calibration/Statutory/Survey Maintenance

### Scheduling of Maintenance Plan

After this Step it will behave the same as Preventive maintenance plan Scheduling and Execution.

To plan/schedule the Maintenance Plan click the Menu on the same screen or enter transaction Code IP10





## SAP User Manual for Calibration/Statutory/Survey Maintenance

This will show the screen below and press “Start” button.

C...	PlanDate	Call date	Completio...	Scheduling Type / Status	Act....	Unit
1	31.12.2020		03.07.2020	New start Complete		181-Da
2	31.12.2021			Scheduled Called		
3	31.12.2022	19.10.2022		Scheduled Hold		
4	31.12.2023	19.10.2023		Scheduled Hold		
5	30.12.2024	18.10.2024		Scheduled Hold		
6	30.12.2025	18.10.2025		Scheduled Hold		
7	30.12.2026	18.10.2026		Scheduled Hold		
8	30.12.2027	18.10.2027		Scheduled Hold		
9	29.12.2028	17.10.2028		Scheduled Hold		
10	29.12.2029	17.10.2029		Scheduled Hold		
11	29.12.2030	17.10.2030		Scheduled Hold		

Press “Enter” it will show the calls can be generated based on start date and task list packages. Save the same and see the list of generated orders.

You can do scheduling with IP30 also where you can schedule more than one Maintenance Plan

You need to provide Maintenance Plan Numbers, Maint. Plan Category, Strategy & Duration & Execute.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Program Edit Goto System Help

Deadline Monitoring for Maintenance Plans (Batch Input IP10)

Deadline monitoring for maintenance plans

Maintenance Plan	1	to	4	
Maint. plan cat.	PM	to		
MaintPlan sort field		to		
Maintenance Strategy		to		

Interval for Call Objects: 365 DAY

Rescheduling incl.

Immediate start for all

Log Control

Application Log

Log (Batch Input)

Mode: Call transaction / BDC session

Call transaction

Call mode: N

BDC session

Group name: IP1020200720

User ID: SB00621355


Save incorrect transactions

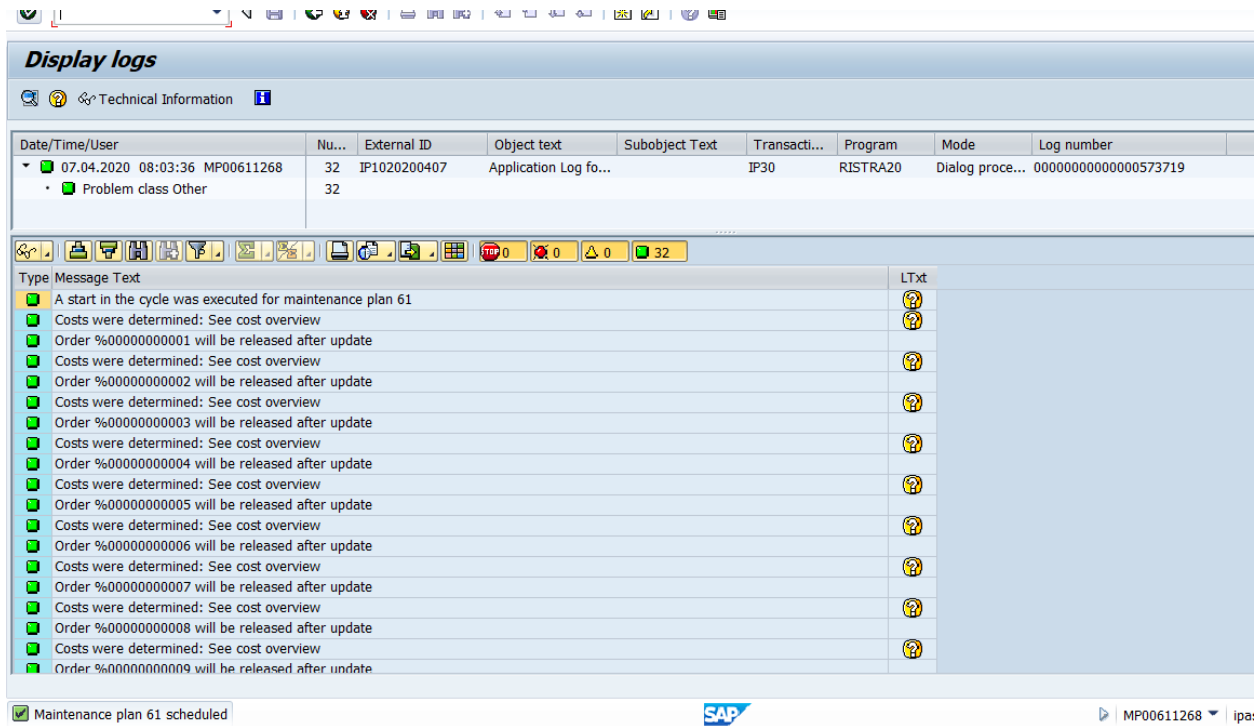
Save errors

PC file/frontend



# SAP User Manual for Calibration/Statutory/Survey Maintenance

It will generate the schedule as below and then press Back  Button



**Display logs**

Technical Information

Date/Time/User	Nu...	External ID	Object text	Subobject Text	Transacti...	Program	Mode	Log number
07.04.2020 08:03:36 MP00611268	32	IP1020200407	Application Log fo...		IP30	RISTRA20	Dialog proce...	0000000000000573719
• Problem class Other	32							

Type Message Text

- A start in the cycle was executed for maintenance plan 61
- Costs were determined: See cost overview
- Order %000000000001 will be released after update
- Costs were determined: See cost overview
- Order %000000000002 will be released after update
- Costs were determined: See cost overview
- Order %000000000003 will be released after update
- Costs were determined: See cost overview
- Order %000000000004 will be released after update
- Costs were determined: See cost overview
- Order %000000000005 will be released after update
- Costs were determined: See cost overview
- Order %000000000006 will be released after update
- Costs were determined: See cost overview
- Order %000000000007 will be released after update
- Costs were determined: See cost overview
- Order %000000000008 will be released after update
- Costs were determined: See cost overview
- Order %000000000009 will be released after update

Maintenance plan 61 scheduled

SAP | MP00611268 | ipa

Click on "Back" button again for exit.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

To see the list of all generated Orders you need to run the Transaction IP24, with Functional Location/Equipment/Maintenance Plant/Maintenance Plan Numbers and “Execute”

The screenshot shows the SAP Scheduling overview list form: Selection Criteria. The form is divided into two main sections: Maintenance item selection and Maintenance dates. The Maintenance item selection section includes fields for Maint. plan cat. (PM), MaintPlan sort field, Maintenance Plan (11), Maintenance Item, Maintenance Strategy, Maint. item text, Functional Location, Equipment, Assembly, Material, and Serial Number. The Settlement rule section has radio buttons for with or w/o, w/, and w/o, and a checkbox for with object list. The Maintenance dates section includes fields for Order, Notification, Entry Sheet, Scheduled start date, Completion date, and Scheduling status. Each field has a 'to' field and a selection icon.

This will show the list of all generated and yet to generate the Maintenance Order.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

Scheduling overview list form: Maintenance Scheduling Overview List

S	Maintenance Item	MntPlan	Strat.	Maintenance item description	Call Number	Start date	Order
	161	11		Cal/Stat/Survey Maint	1	31.12.2020	1000081
	161	11		Cal/Stat/Survey Maint	2	31.12.2021	1000101
	161	11		Cal/Stat/Survey Maint	3	31.12.2022	
	161	11		Cal/Stat/Survey Maint	4	31.12.2023	
	161	11		Cal/Stat/Survey Maint	5	30.12.2024	
	161	11		Cal/Stat/Survey Maint	6	30.12.2025	
	161	11		Cal/Stat/Survey Maint	7	30.12.2026	
	161	11		Cal/Stat/Survey Maint	8	30.12.2027	
	161	11		Cal/Stat/Survey Maint	9	29.12.2028	
	161	11		Cal/Stat/Survey Maint	10	29.12.2029	
	161	11		Cal/Stat/Survey Maint	11	29.12.2030	

Schedule generated for one year from the date of trigger example 01.01.2020+365 days



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Open Order in IW32 and start execution of operation on given dates, as per operation you can go for tendering activity, internal execution.

The screenshot shows the SAP IW32 interface for a maintenance order. The title bar reads "Change Calibration/Statutory/Survey Maintenance 1000101: Cement". The status is "Complete (business)". The order number is ZM03 1000101, and the description is "Cal/Stat/Survey Maint". The system status is REL NMAT PRC.

The interface includes several tabs: HeaderData, Operations, Components, Costs, Objects, Additional Data, and Location. The "HeaderData" tab is active, showing the following fields:

Person responsible	
PlannerGrp	107 / 1000 MEED
Mn.wk.ctr	PM_CME / 1000 PM CME Departm...
Notifctn	
Costs	0,00 INR
PMActType	
SystCond.	

Dates	
Bsc start	31.12.2021
Basic fin.	31.12.2021
Priority	
Revision	

Reference object	
Func. Loc.	1000-COTN-0002 Kala Chowkey
Equipment	10000340 5 HP Pumping Set No. 1
Assembly	

First operation	
Operation	Cal/Stat/Survey Maint
WkCtr/Plnt	PM_CME / 1000
Work durtn	
Ctrl key	PM01
Number	
Calc. key	Calculate duration
Acty Type	
Oprtn dur.	



## SAP User Manual for Calibration/Statutory/Survey Maintenance

### External Service Creation in Maintenance Order

**Change Calibration/Statutory/Survey Maintenance 1000101: Operation Ove**

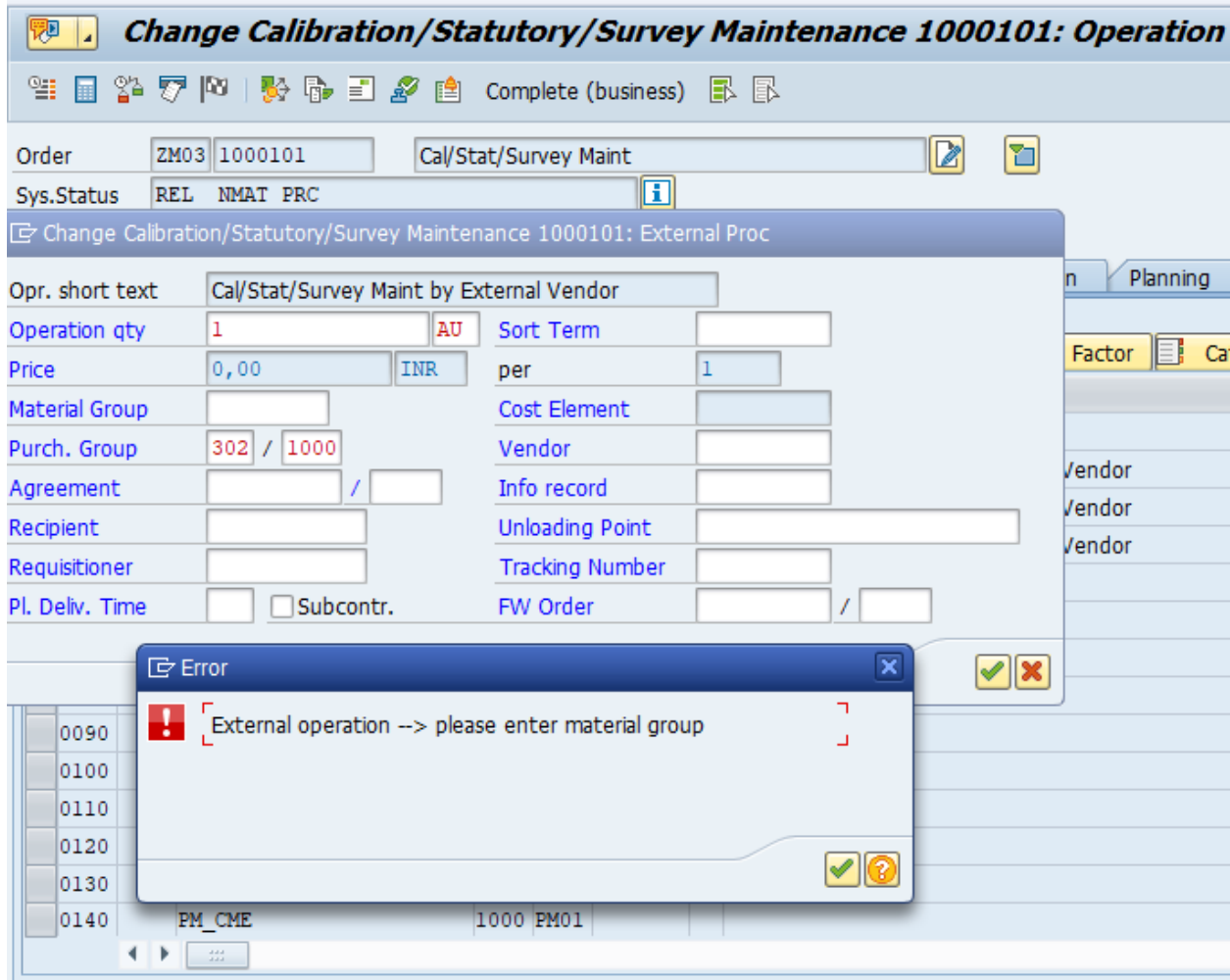
Order: ZM03 1000101 Cal/Stat/Survey Maint  
Sys.Status: REL GMPS JBFI MANC NMAT PRC SETC

HeaderData | Operations | Components | Costs | Objects | Additional Data | Location | Planning | Control

General	Internal	External	Dates	Act. Data	Enhancement	Ex. Factor	Catalog		
OpAc	SOp	Work Ctr	Plant	Co...	StTextK	S..	Operation short text	L...	Actual wc
0010		PM_CME	1000	PM01			Cal/Stat/Survey Maint		
0030		PM_CME	1000	PM03			Cal/Stat/Survey Maint by External Vendor		

## SAP User Manual for Calibration/Statutory/Survey Maintenance

For Cal/stat/survey Maint by External Vendor, change the control key from PM01 to PM03 because of Tendering activity.



And Press, “Enter”

Enter details of Material Group, Purchasing Group & Plant, press Enter, and fill the same details for next operation.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

The screenshot shows the SAP 'Change Calibration/Statutory/Survey Maintenance 1000101: External Proc' dialog box. The main window title is 'Change Calibration/Statutory/Survey Maintenance 1000101: External Proc'. The dialog box contains the following fields:

- Opr. short text: Cal/Stat/Survey Maint by External Vendor
- Operation qty: 1 (with 'AU' button)
- Price: 0,00 (with 'INR' button)
- Material Group: 72000000
- Purch. Group: 101 (with search icon) / 1000
- Agreement: /
- Recipient: /
- Requisitioner: /
- Pl. Deliv. Time: / (with 'Subcontr.' checkbox)
- Sort Term: /
- per: 1
- Cost Element: /
- Vendor: /
- Info record: /
- Unloading Point: /
- Tracking Number: /
- FW Order: /

At the bottom of the dialog box, there is a table with the following data:

0090	PM_CME	1000	PM01		
0100	PM_CME	1000	PM01		
0110	PM_CME	1000	PM01		
0120	PM_CME	1000	PM01		
0130	PM_CME	1000	PM01		
0140	PM_CME	1000	PM01		

System will generate the below Message

Message box content:  Purchase requisition for service activity / element cannot be generated



## SAP User Manual for Calibration/Statutory/Survey Maintenance

You need to maintain Service Operations.

Select the operation, click on External, and maintain the data, same need to be done for the further activities, which are planned for tendering.

**Change Calibration/Statutory/Survey Maintenance 1000101: External Proc**

Order 1000101 Activity 0030 / Ctrl key PM03  
 StdTextKey/ShrtText Cal/Stat/Survey Maint by External Vendor

General Internal **External** Dates Act. Data Dry Dock

Operation qty 1 AU Sort Term  
 Price 60.000,00 INR per 1  
 Material Group 72000000 Cost Element  
 Purch. Group 101 / 1000 Vendor  
 Agreement / Info record  
 Recipient Unloading Point  
 Requisitioner MP00611268 Tracking Number  
 Pl. Deliv. Time Subcontr. FW Order /

Services Components Relationships

Line	D..	Service No.	Short Text	Quantity	Un	Gross Price	Crcy	Overf. Tol.	U Cost Elem..
10	<input type="checkbox"/>	8300000085	Two Coats - Oil Bound Distemper	3	M2	20.000,00	INR		41300012
20	<input type="checkbox"/>						INR		
30	<input type="checkbox"/>						INR		
40	<input type="checkbox"/>						INR		

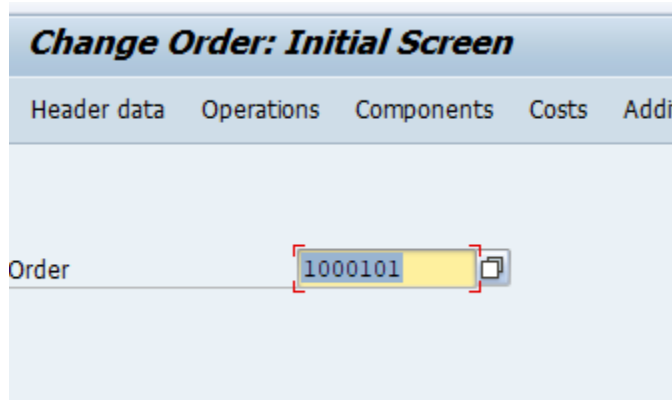
Click on Header Data & Save it.

Order saved with number 1000101

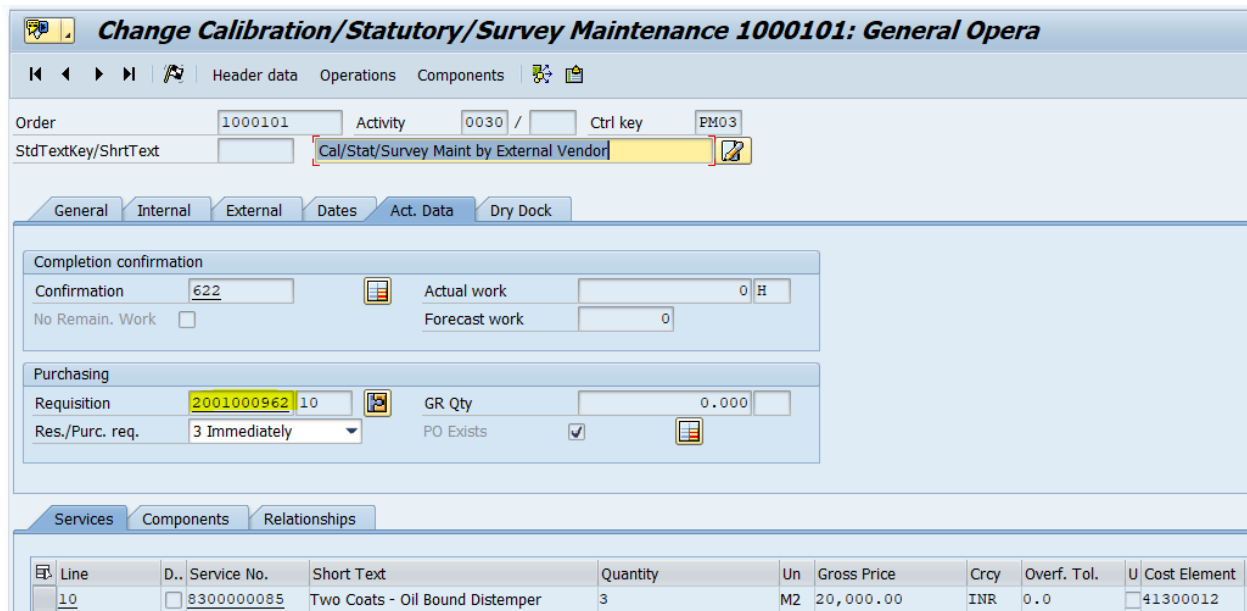
Open the order again & go to Operation Tab and Select the Operation and Actual Data.




## SAP User Manual for Calibration/Statutory/Survey Maintenance



PR is generated, now this need to be saved with tendering or Non Tendering.



## Purchase Requisition Creation MM Script

Go to Transaction Code ME52N and click on  button to open the PR, which is generated from maintenance order.

## SAP User Manual for Calibration/Statutory/Survey Maintenance

**Change Purchase Req. 2001000962**

Document Overview On | Personal Setting

ZZNB Standard PR

Header

Stat... Item A I

Quantity	Unit	C	Delivery Date	Valn Price	Per	Material Group
1	AU	D	31.12.2021	60,000.00	1	Construction S...
						0
						0
						0
						0

Select Document

Purchase Requisition **2001000962**

Pur. Order

Purch. Requisition

SRM Contract

Other Document ✖

Item: 1 [ 10 ] Cal/Stat/Survey Maint by External Vendor

Valuation | Account Assignment | Source of Supply | Versions | Status | Contact Person | Texts | Delivery Address | Customer I

Select Custom Field List

Data Fields  Email List  Terms & Conditions

Mode of Purchase: T Tender | Purchase types

Enter the PR Number and press “Enter” for update for Tendering activity.

**Change Purchase Req. 2001000962**

Document Overview On | Personal Setting

ZZNB Standard PR

Header

Stat... Item A I

Quantity	Unit	C	Delivery Date	Valn Price	Per	Material Group
1	AU	D	31.12.2021	60,000.00	1	Construction S...
						0
						0
						0
						0

Select Document

Purchase Requisition **2001000962**

Pur. Order

Purch. Requisition

SRM Contract

Other Document ✖

Item: 1 [ 10 ] Cal/Stat/Survey Maint by External Vendor

Valuation | Account Assignment | Source of Supply | Versions | Status | Contact Person | Texts | Delivery Address | Customer I

Select Custom Field List

Data Fields  Email List  Terms & Conditions

**Mode of Purchase: T Tender** | Purchase types





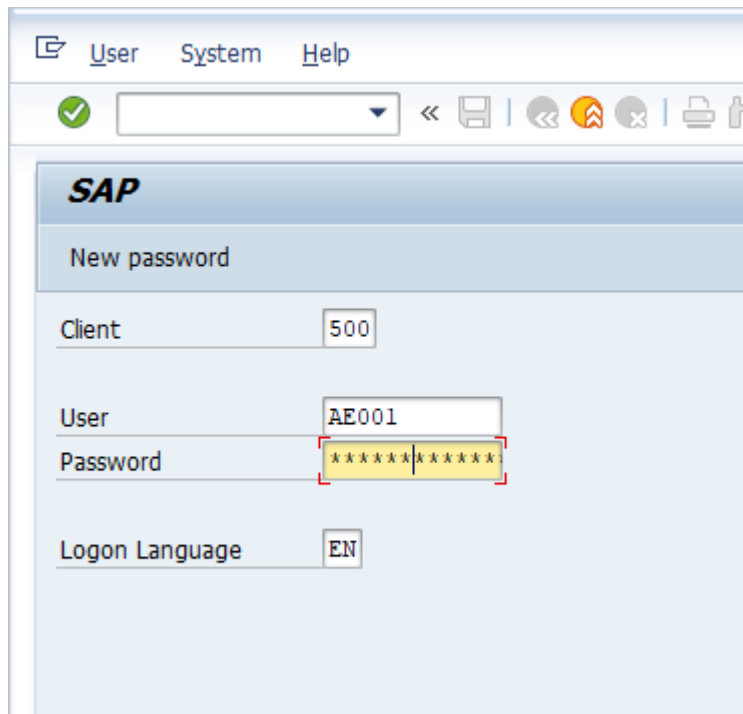
## SAP User Manual for Calibration/Statutory/Survey Maintenance

Go to customer data Tab, and fill the detail for Tender or Non Tender and Save the Purchase Req using Save Icon.

System will change Purchase requisition document & displays “Purchase Requisition 2001000962 Changed” message.

### Purchase Requisition Approval (Workflow)

Login as **Approver 1** (Assistant Engineer) in SAP System.



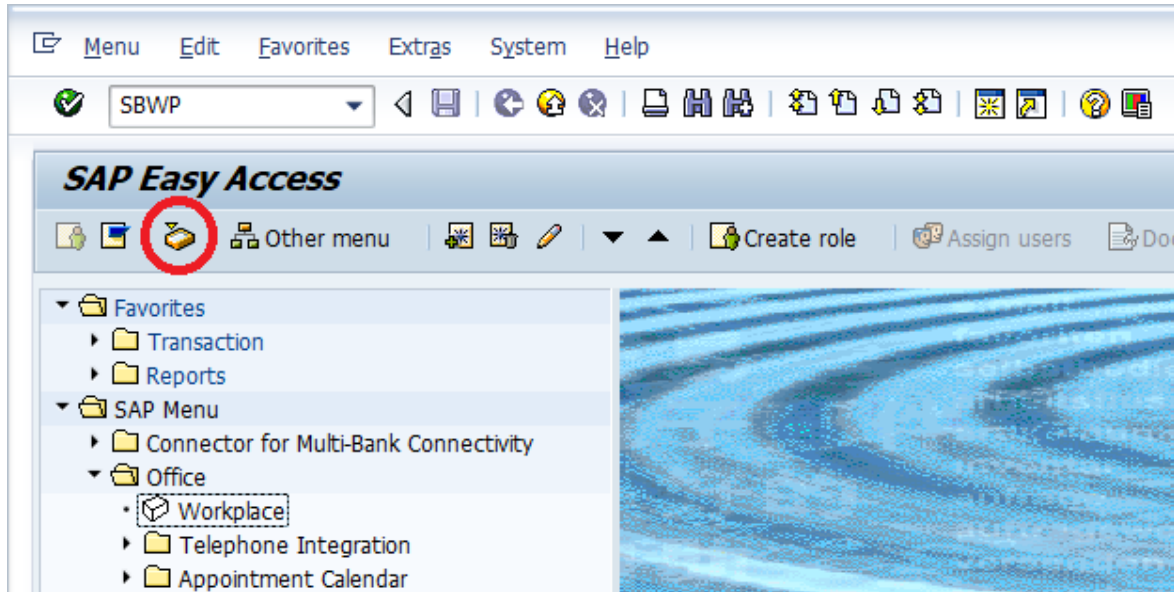
Click on “” **SAP Business Workspace** Button.

Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.

Transaction Code	SBWP
Menu Path	Easy Access → SAP Menu → Office → Workplace



## SAP User Manual for Calibration/Statutory/Survey Maintenance



Expand “Inbox” button, under workflow “**Approve Purchase requisition 2002000962**” message will appear.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

**Workflow 29**

Exe...	Title	Status	Work Item ID	Creation Date	Creation Ti...	P	Atta...	Con...
	Please approve the Purchase Requisition 2001000962		415071	23.07.2020	19:27:18	5		
	Please approve the Purchase Order 4000010071		415659	23.07.2020	13:04:49	5		
	Please approve the Purchase Order 4000010064		414818	22.07.2020	11:52:04	5		
	Please approve the Purchase Requisition 2001000963		415320	20.07.2020	02:34:58	5		
	Please approve the Purchase Requisition 2001000963		414579	20.07.2020	02:33:46	5		
	Please approve the Purchase Requisition 2001000962		414487	19.07.2020	15:13:42	5		
	Please approve the Purchase Requisition 2001000962		414486	19.07.2020	15:13:02	5		
	Please approve the Purchase Requisition 2001000961		415262	19.07.2020	15:10:39	5		
	Please approve the Purchase Requisition 2001000961		415261	19.07.2020	15:10:16	5		
	Please approve the Purchase Requisition 2001000959		415260	19.07.2020	15:10:03	5		
	Please approve the Purchase Requisition 2001000959		414485	19.07.2020	15:07:07	5		
	Please approve the Purchase Requisition 2001000959		414484	19.07.2020	15:06:38	5		

Tips & tricks: Send mail...

**Please approve the Purchase Requisition 2001000962**

Description	Objects and attachments
Select one of the available decision options. This completes the processing of this step. Before you make a decision, you can display the	No attachments or objects exist

Double Click on the “**Please Approve Purchase requisition 2002000962**” message. It will open the Purchase requisition document in Display mode.

Click on “” **Back** Button. System will open Decision step in workflow screen.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

**Decision Step in Workflow**

Workflow Create Import

Please approve the Purchase Requisition 2001000962

Choose one of the following alternatives

Approve Purchase Requisition
Reject Purchase Requisition
Display Purchase Requisition
Approval or Rejection History
Hold

<b>Description</b> Select one of the available decision options. This completes the processing of this step.  Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments.  If you choose Cancel, the user decision remains in your inbox for processing.	<b>Objects and attachments</b> No attachments or objects exist
---	---

Click on “**Approve Purchase Requisition**” Button to approve the Purchase Requisition.

Purchase Requisition will be approved with level 1.

Purchase Requisition Approval Request notification is forwarded to Approver 2

Login as **Approver 2** (Executive Engineer) in SAP System.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

The screenshot shows the SAP 'New password' form. The form is titled 'SAP' and 'New password'. It contains the following fields:

Client	500
User	EP001
Password	*****
Logon Language	EN

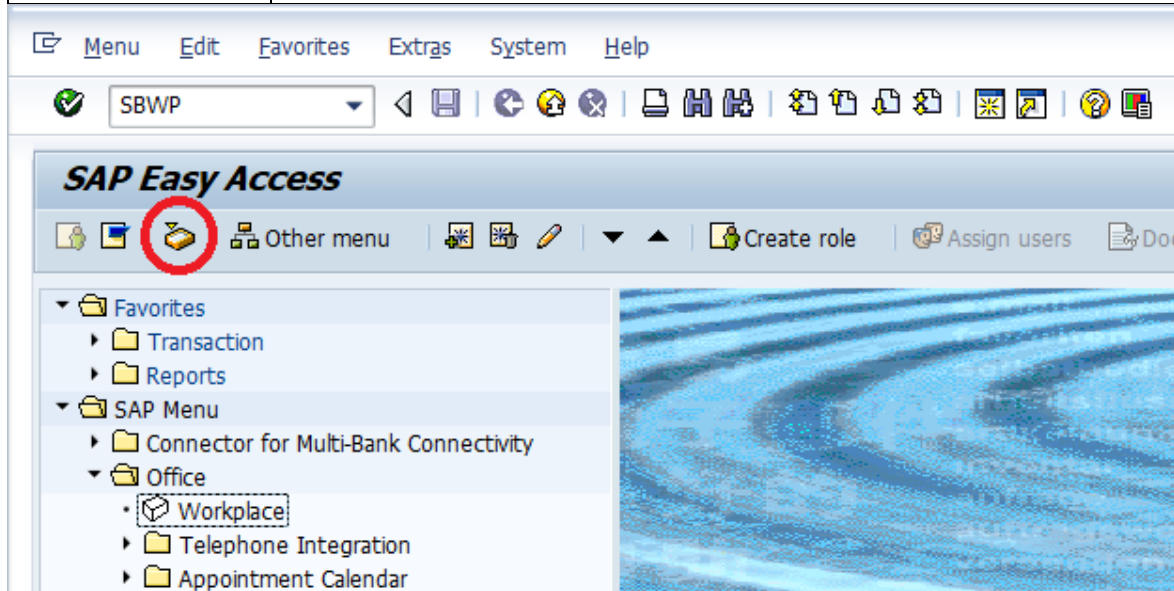
The 'User' field is highlighted with a yellow background and a red border. The 'Password' field is masked with asterisks.

## SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “” **SAP Business Workspace** Button.

Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.

Transaction Code	SBWP
Menu Path	Easy Access → SAP Menu → Office → Workplace



Expand “**Inbox**” button, under workflow “**Approve Purchase requisition 2002000962**” message will appear.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

The screenshot shows a SAP workflow interface. At the top, there is a toolbar with various icons. Below the toolbar, the title "Workflow 28" is displayed. A table lists several tasks, with the task "Please approve the Purchase Requisition 2001000962" highlighted in yellow. Below the table, a detailed view of this task is shown, including a description and a section for objects and attachments.

Exe...	Title	Status	Work Item ID	Creation Date	Creation Ti...	P	Atta...
	Please approve the Purchase Order 4000010071		415659	23.07.2020	13:04:49	5	
	Please approve the Purchase Order 4000010064		414818	22.07.2020	11:52:04	5	
	Please approve the Purchase Requisition 2001000963		415320	20.07.2020	02:34:58	5	
	Please approve the Purchase Requisition 2001000963		414579	20.07.2020	02:33:46	5	
	Please approve the Purchase Requisition 2001000962		414487	19.07.2020	15:13:42	5	
	Please approve the Purchase Requisition 2001000962		414486	19.07.2020	15:13:02	5	
	Please approve the Purchase Requisition 2001000961		415262	19.07.2020	15:10:39	5	
	Please approve the Purchase Requisition 2001000961		415261	19.07.2020	15:10:16	5	
	Please approve the Purchase Requisition 2001000959		415260	19.07.2020	15:10:03	5	
	Please approve the Purchase Requisition 2001000959		414485	19.07.2020	15:07:07	5	
	Please approve the Purchase Requisition 2001000959		414484	19.07.2020	15:06:38	5	
	Please approve the Purchase Requisition 2001000959		415258	19.07.2020	15:05:51	5	

**Please approve the Purchase Requisition 2001000962**

<p><b>Description</b></p> <p>Select one of the available decision options. This completes the processing of this step.</p> <p>Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments</p>	<p><b>Objects and attachments</b></p> <p>No attachments or objects exist</p>
--	--

Double Click on the “Please Approve Purchase requisition 2002000962” message. System will open the Purchase requisition document in Display mode.

Click on “” **Back** Button. System will open Decision step in workflow screen.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

**Decision Step in Workflow**

Workflow Create Import

Please approve the Purchase Requisition 2001000962

Choose one of the following alternatives

- Approve Purchase Requisition
- Reject Purchase Requisition
- Display Purchase Requisition
- Approval or Rejection History
- Hold

<p><b>Description</b></p> <p>Select one of the available decision options. This completes the processing of this step.</p> <p>Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments.</p> <p>If you choose Cancel, the user decision remains in your inbox for processing.</p>	<p><b>Objects and attachments</b></p> <p>No attachments or objects exist</p>
--	--

Click on “**Approve Purchase Requisition**” Button to approve the Purchase Requisition.

Purchase Requisition will be approved with level 2.

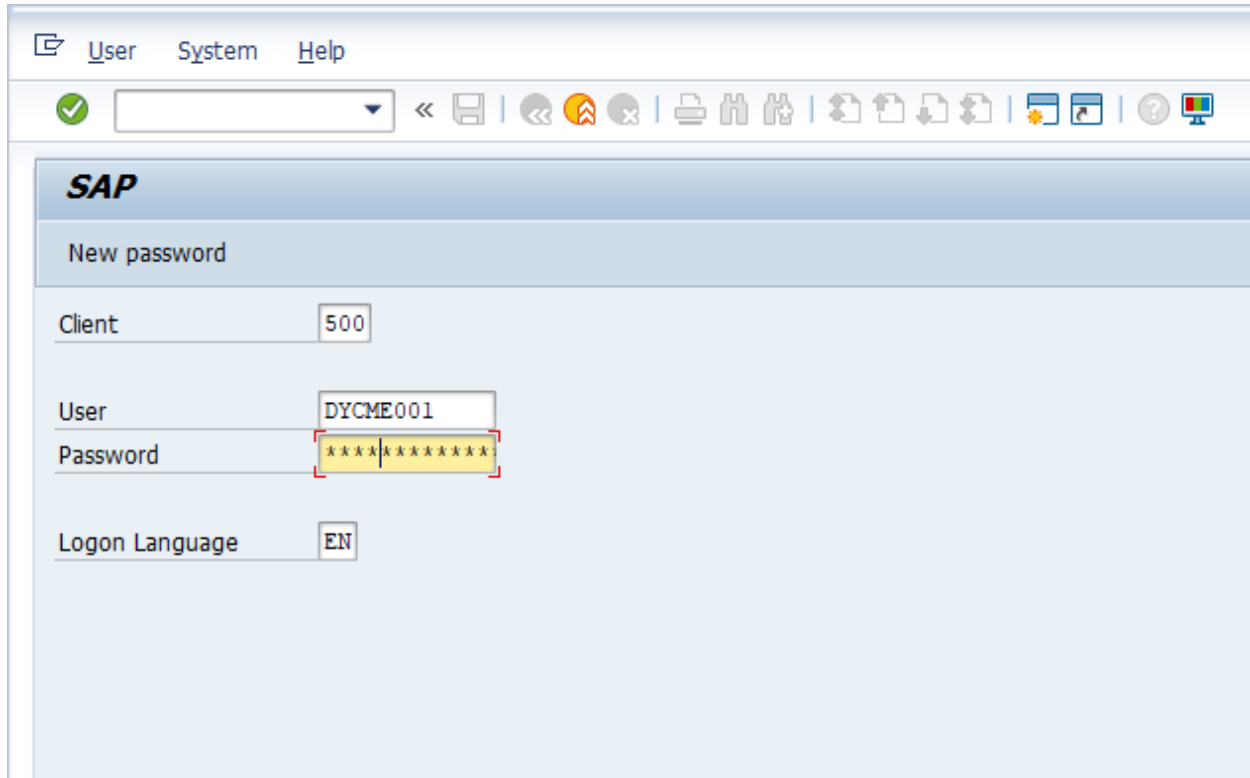
Purchase Requisition Approval Request notification is forwarded to Approver 3.

Login as **Approver 3** (Dy CME) in SAP System.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

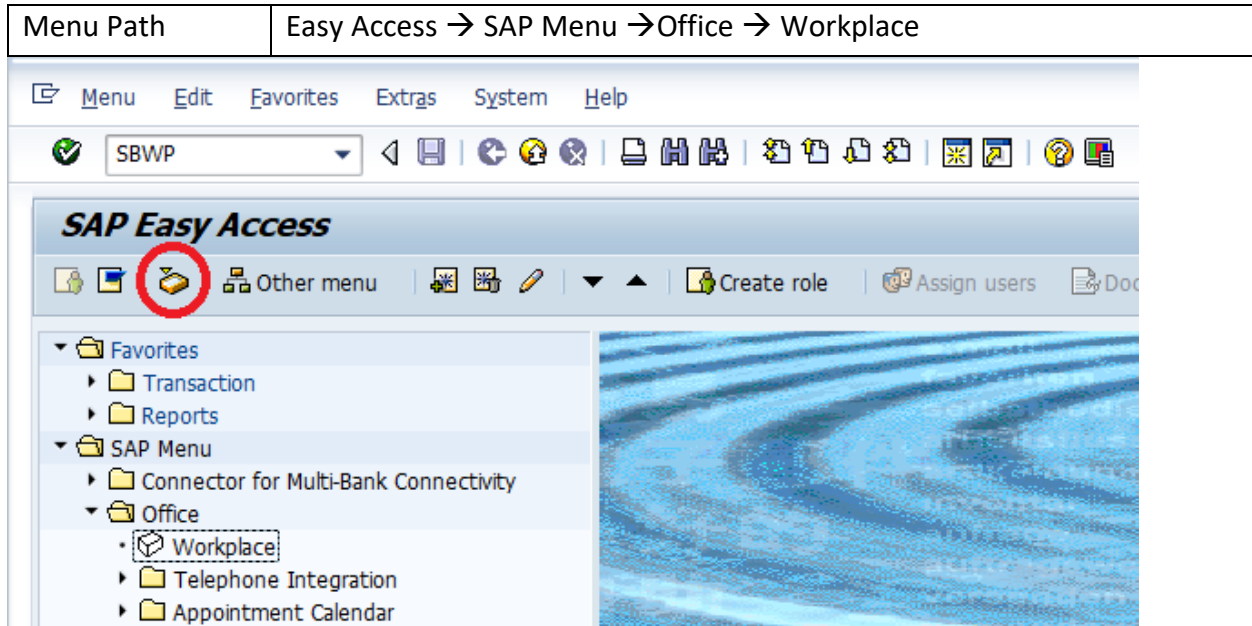


Click on “” **SAP Business Workspace** Button.

Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.

Transaction Code	SBWP
------------------	------

## SAP User Manual for Calibration/Statutory/Survey Maintenance



Expand “Inbox” button, under workflow “**Approve Purchase requisition 2002000962**” message will appear.



# SAP User Manual for Calibration/Statutory/Survey Maintenance

Workflow 28

Exe...	Title	Status	Work Item ID	Creation Date	Creation Ti...	P	At
	Please approve the Purchase Requisition 2001000962		415074	23.07.2020	19:32:41	5	
	Please approve the Purchase Order 4000010071		415659	23.07.2020	13:04:49	5	
	Please approve the Purchase Order 4000010064		414818	22.07.2020	11:52:04	5	
	Please approve the Purchase Requisition 2001000963		415320	20.07.2020	02:34:58	5	
	Please approve the Purchase Requisition 2001000963		414579	20.07.2020	02:33:46	5	
	Please approve the Purchase Requisition 2001000962		414486	19.07.2020	15:13:02	5	
	Please approve the Purchase Requisition 2001000961		415262	19.07.2020	15:10:39	5	
	Please approve the Purchase Requisition 2001000961		415261	19.07.2020	15:10:16	5	
	Please approve the Purchase Requisition 2001000959		415260	19.07.2020	15:10:03	5	
	Please approve the Purchase Requisition 2001000959		414485	19.07.2020	15:07:07	5	
	Please approve the Purchase Requisition 2001000959		414484	19.07.2020	15:06:38	5	
	Please approve the Purchase Requisition 2001000959		415258	19.07.2020	15:05:51	5	

⚙️ Tips & tricks: Deadline M


Please approve the Purchase Requisition 2001000962

<p><b>Description</b></p> <p>Select one of the available decision options. This completes the processing of this step.</p> <p>Before you make a decision, you can display the</p>	<p><b>Objects and attachments</b></p> <p>No attachments or objects exist</p>
---	--



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Double Click on the “**Please Approve Purchase requisition 2002000962**” message. System will open the Purchase requisition document in Display mode.

Click on “” Back Button. System will open Decision step in workflow screen.

Please approve the Purchase Requisition 2001000962

---

Choose one of the following alternatives

Approve Purchase Requisition
Reject Purchase Requisition
Display Purchase Requisition
Approval or Rejection History
Hold

---

<p><b>Description</b></p> <p>Select one of the available decision options. This completes the processing of this step.</p> <p>Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments.</p> <p>If you choose Cancel, the user decision remains in your inbox for processing.</p>	<p><b>Objects and attachments</b></p> <p>No attachments or objects exist</p>
--	--

Click on “**Approve Purchase Requisition**” Button to approve the Purchase Requisition.

Purchase Requisition will be approved with level 3.

Purchase Requisition Approval Request notification is forwarded to Approver 4.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Login as **Approver 4** (CME) in SAP System.

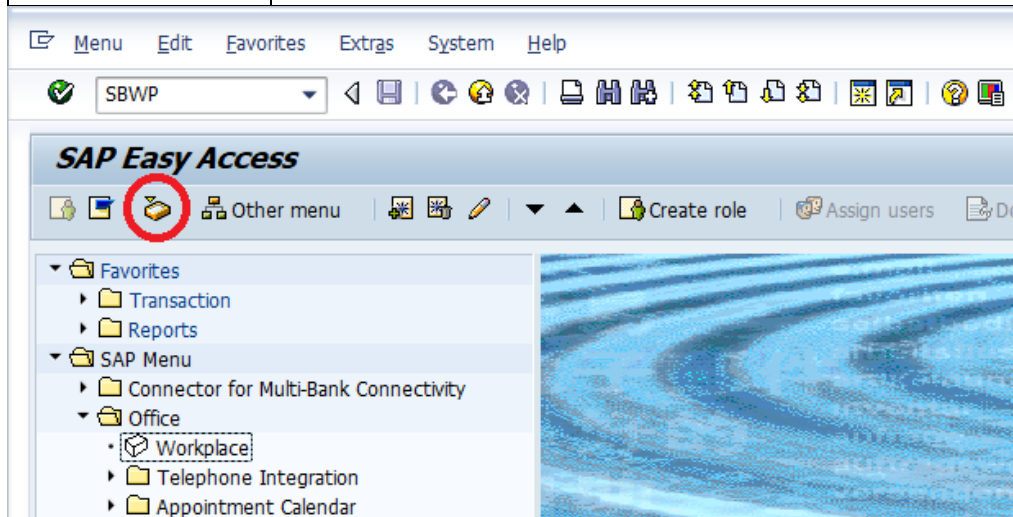
The screenshot shows the SAP login interface. At the top, there is a menu bar with 'User', 'System', and 'Help'. Below it is a toolbar with various icons. The main area is titled 'SAP' and contains a 'New password' section. The login fields are: Client (500), User (CME001), Password (masked with asterisks), and Logon Language (EN). A red arrow points to the Client field.

## SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “” **SAP Business Workspace** Button.

Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.

Transaction Code	SBWP
Menu Path	Easy Access → SAP Menu → Office → Workplace





## SAP User Manual for Calibration/Statutory/Survey Maintenance

Expand “Inbox” button, under workflow “Approve Purchase requisition 2002000962” message will appear.

**Workflow 28**

Exe...	Title	Status	Work Item ID	Creation Date	Creation Ti...	P	Atta
	Please approve the Purchase Requisition 2001000962		415080	23.07.2020	19:36:19	5	
	Please approve the Purchase Requisition 2001000962		415077	23.07.2020	19:34:17	5	
	Please approve the Purchase Order 4000010071		415659	23.07.2020	13:04:49	5	
	Please approve the Purchase Order 4000010064		414818	22.07.2020	11:52:04	5	
	Please approve the Purchase Requisition 2001000963		415320	20.07.2020	02:34:58	5	
	Please approve the Purchase Requisition 2001000963		414579	20.07.2020	02:33:46	5	
	Please approve the Purchase Requisition 2001000961		415262	19.07.2020	15:10:39	5	
	Please approve the Purchase Requisition 2001000961		415261	19.07.2020	15:10:16	5	
	Please approve the Purchase Requisition 2001000959		415260	19.07.2020	15:10:03	5	
	Please approve the Purchase Requisition 2001000959		414485	19.07.2020	15:07:07	5	
	Please approve the Purchase Requisition 2001000959		414484	19.07.2020	15:06:38	5	
	Please approve the Purchase Requisition 2001000959		415258	19.07.2020	15:05:51	5	

**Workflow 28**

**Tips & tricks:** Reserve wor


**Please approve the Purchase Requisition 2001000962**

Description	Objects and attachments
Select one of the available decision options. This completes the processing of this step. Before you make a decision, you can display the	No attachments or objects exist



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Double Click on the “**Please Approve Purchase requisition 2002000962**” message. System will open the Purchase requisition document in Display mode.

Click on “  ” **Back** Button. System will open Decision step in workflow screen.

Please approve the Purchase Requisition 2001000962	
Choose one of the following alternatives	
Approve Purchase Requisition	
Reject Purchase Requisition	
Display Purchase Requisition	
Approval or Rejection History	
Hold	
<b>Description</b> Select one of the available decision options. This completes the processing of this step.  Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments.  If you choose Cancel, the user decision remains in your inbox for processing.	<b>Objects and attachments</b> No attachments or objects exist

Click on “**Approve Purchase Requisition**” Button to approve the Purchase Requisition.

Purchase Requisition will be approved with level 4. Once the Purchase requisition is approved by all 4 level approvers, a notification is triggered to Purchase Requisition Initiator and all preceding approvers.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

This will go for tendering work will be awarded and need to do Service Consumption

For Service Consumption need to execute MM Script of Service Consumption.

### Portal Logon

#### EBS Portal & SSO to SRM Portal

Access the URL URL <https://10.9.7.22:8001/ebs-portal/> in IE browser. Below screen will be displayed.



Under “Port Users” tab provide your user-id and password.

Input the captcha as mentioned and then check the “Terms and Conditions” statement.

Click on “Submit” button.

## SAP User Manual for Calibration/Statutory/Survey Maintenance



A new window will be displayed and it will prompt to enter the OTP. OTP will be sent to your registered mobile.

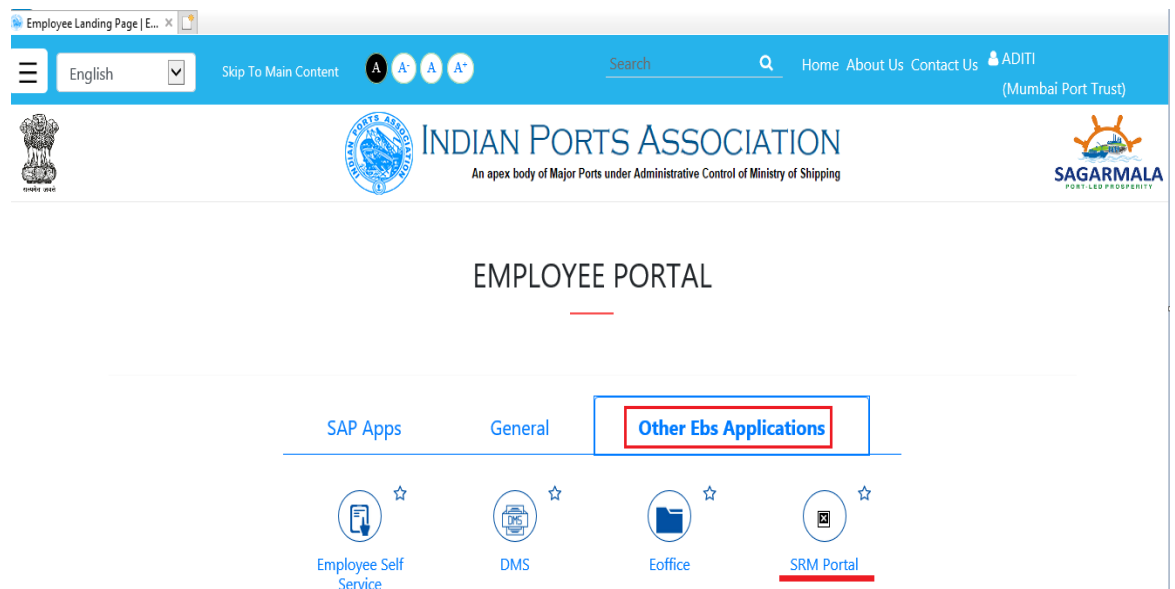
Input the OTP and click on “Verify OTP” button. Please see screenshot below.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

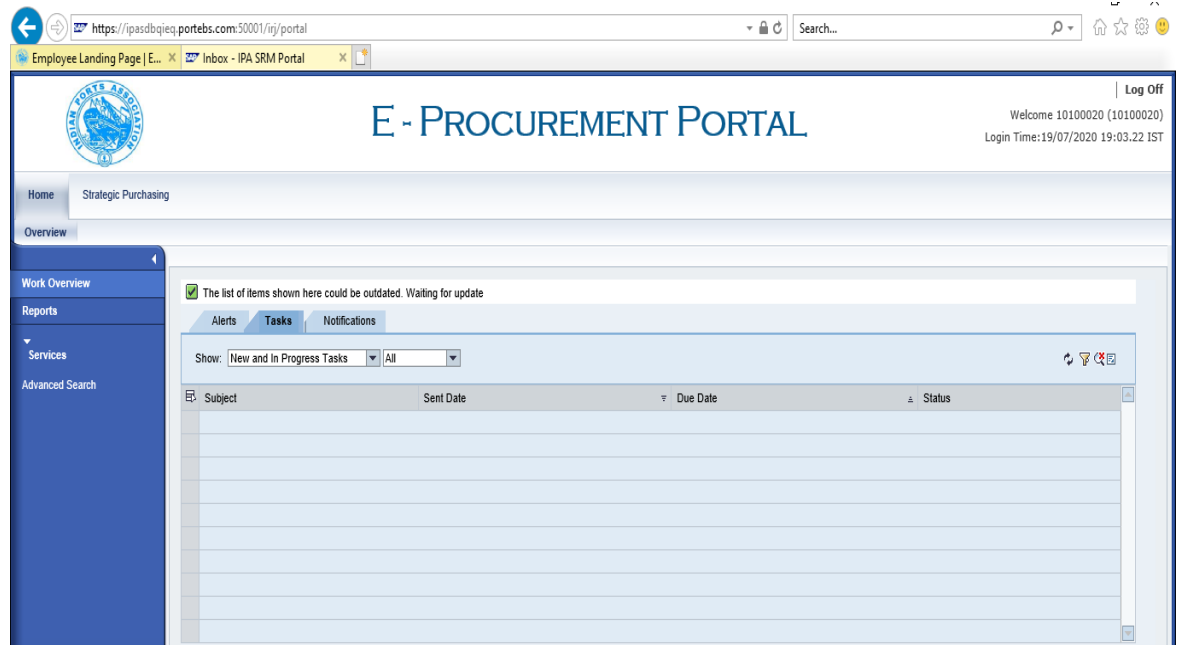
Once system verifies the OTP a new window will be displayed. Select “Other EBS Application” tab and click on “SRM Portal” link. Please see screenshot below.



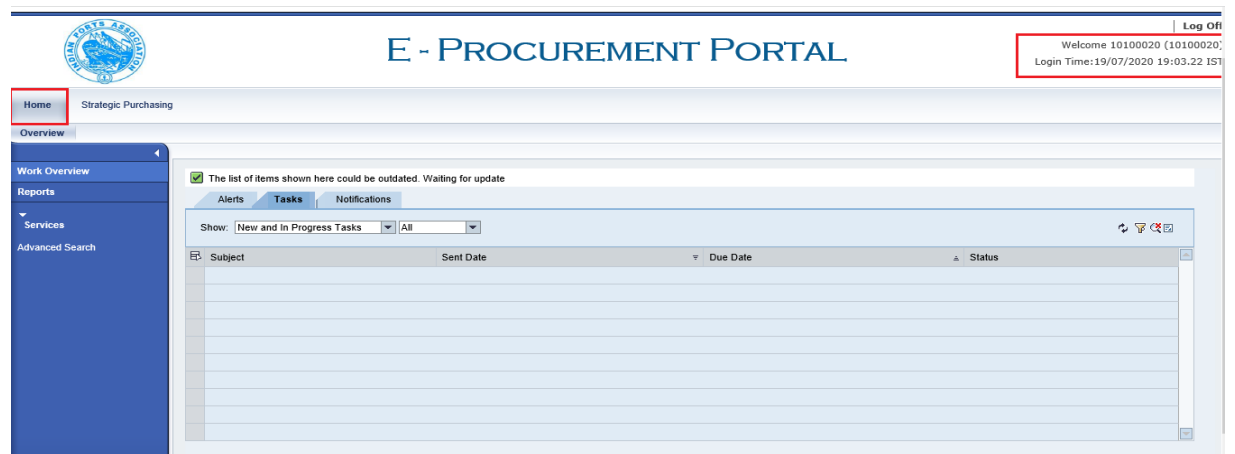
A new window will be opened wherein you will be redirected to the SRM portal through SSO. The screen will be displayed as shown below.



## SAP User Manual for Calibration/Statutory/Survey Maintenance



The screen contains the information of User id / Name and logon time at the right corner. The “Home” tab will be displayed on the left corner of the screen.





# SAP User Manual for Calibration/Statutory/Survey Maintenance

## Strategic Purchasing

Select "Strategic Purchasing" tab then click on "Strategic Sourcing" link. At the right side panel, user will be able to see the list of RFX's with various status.

This is basically a dashboard where the user can view and act upon the tender's created using their user-id's.

There are different search criteria's provided by system to search the Tender's created.

The screenshot shows the 'E-PROCUREMENT PORTAL' interface. The 'Strategic Purchasing' tab is active. On the left, a navigation menu includes 'Strategic Sourcing', 'Contract Management', 'Business Partner', 'Workload Redistribution', and 'Services'. The main content area displays search filters for 'RFXs - All'. A red box highlights the search criteria section, which includes fields for: Number (with 'To' field), RFX Type (dropdown), Name of RFX (text input), Status (dropdown), Processed Since (dropdown), Purchasing Organization (dropdown with value '05000634'), Product Category (dropdown), Submission Deadline (dropdown), My RFX (checkbox), Purchase Group (dropdown), and Number of RFX responses (with 'To' field). There are also links for 'Change Query', 'Define New Query', and 'Personalize'.

The screenshot shows the 'Strategic Sourcing' dashboard. A red box highlights the 'Active Queries' section. Below it, there are summary statistics for RFXs, Auctions, and Sourcing Templates. A table titled 'RFXs - All' is displayed, showing a list of RFXs with columns for RFX Number, RFX Name, Type, Status, RFX Category, Purchasing Organization, Submission Deadline, and Responses. A red box highlights the table's header and the first few rows of data.

RFX Number	RFX Name	Type	Status	RFX Category	Purchasing Organization	Submission Deadline	Responses
5100000162	Budgetary Offer	ZEOI	Awaiting Approval		Mumbai Port Trust Purchase Organisation	17.07.2020	0
5100000161	Copy of 5100000160 BSE Test	ZLT2	Published		Mumbai Port Trust Purchase Organisation	16.07.2020	0
5100000160	Copy of 5100000144 - BSE Test	ZLT2	Published		Mumbai Port Trust Purchase Organisation	14.07.2020	0
5100000152	10100020 08.07.2020 17:41:23	ZSTI	Awaiting Approval		Mumbai Port Trust Purchase Organisation	31.07.2020	0



## SAP User Manual for Calibration/Statutory/Survey Maintenance

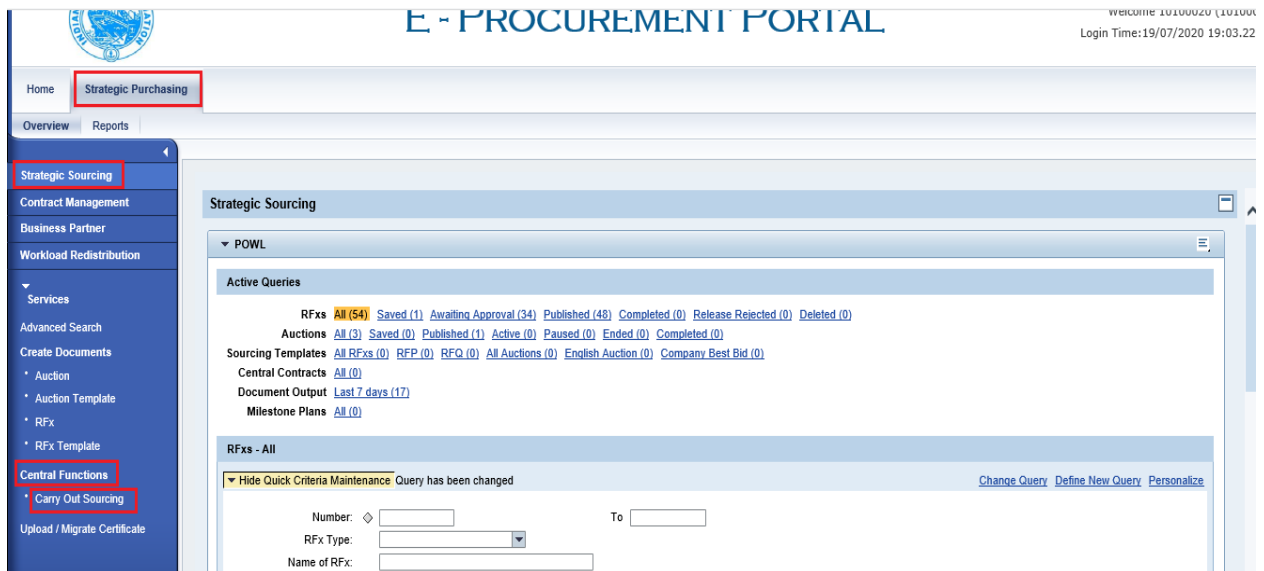
### Carry Out Sourcing

To see the list of purchase requisition's replicated from the backend HANA system & create tender's against them, user need to go to Carry Out sourcing option. Follow below steps.

Select “Strategic Purchasing” tab then click on “Strategic Sourcing” link. Under “Central Function” click on “Carry Out Sourcing” link.

Steps would be as **Strategic Purchasing → Strategic Sourcing → Central Functions → Carry Out Sourcing**.

Please see the screenshot below.



A new window will get displayed as shown below. This is the first step of searching the Purchase requisitions. There are various search criteria's provided through which you can search the purchase requisitions.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

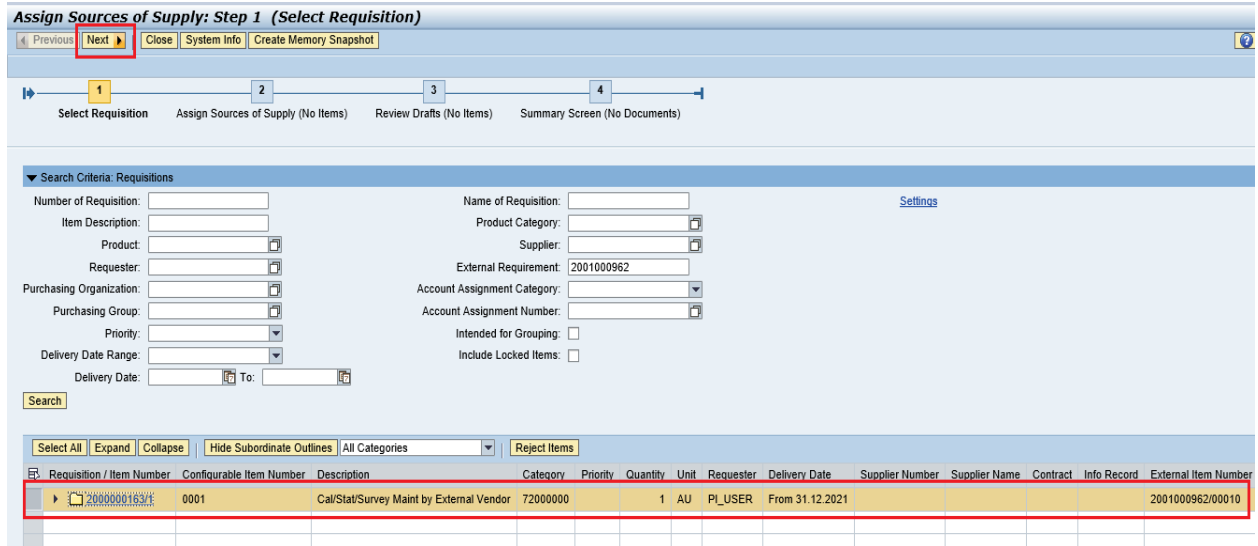
If you know the PR number, then enter SAP Purchase Requisition in “External Requisition” field and click on “Search” button. Purchase Requisition Line items shows below

Requisition / Item Number	Configurable Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Contract	Info Record	External Item Number
2000000163/1	0001	Cal/Stat/Survey Maint by External Vendor	72000000		1	AU	PI_USER	From 31.12.2021					2001000962/00010
2000000163/2	0001.AA	Two Coats - Oil Bound Distemper	72000000		3	M2	PI_USER	From 31.12.2021					2001000962/00010

Click on “Select All” button and click on “Next” button.



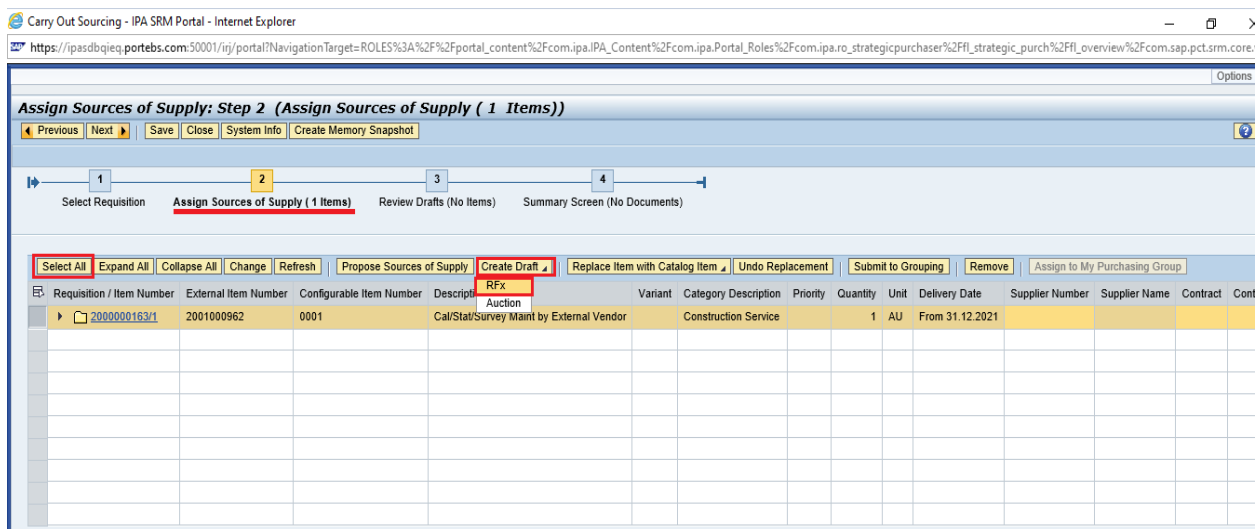
# SAP User Manual for Calibration/Statutory/Survey Maintenance



Once you click on “Next” button, system will direct to next step#2 of selecting the Draft document to be created.

Once again click on “Select All” button to ensure all the PR’s and line items are properly selected.

Then click on the “Create Draft” button and select “RFx” from the drop down list as shown in below screenshot.



Once you click on “Next” button, system will direct to next step#3 of selecting the Transaction Type for the tender to be created.





# SAP User Manual for Calibration/Statutory/Survey Maintenance

From the drop down list select “ZAT1 – Adv/Open Tender 1 Env” option.

**Assign Sources of Supply: Step 3 (Review Drafts ( 1 Items))**

Previous Next Process All Drafts Close Process Selected Drafts Edit Selected Drafts System Info Create Memory Snapshot

1 Select Requisition 2 Assign Sources of Supply (No Items) 3 **Review Drafts ( 1 Items)** 4 Summary Screen (No Documents)

Created Drafts

Change Selected Draft To Remove

Draft Name	Draft Type	Supplier Number	Supplier	Transaction Type
10100020 22.07.2020 15:31:01	Bid Invitation			ZAT1 : Adv/Opn Tender 1 Env ZAT2 : Adv/Opn Tender 2 Env ZEOI : EOI/Budgetary offer ZLT1 : Limited Tender 1 Env ZLT2 : Limited Tender 2 Env ZSTI : Single Tender

Details of Selected Drafts 10100020 22.07.2020 15:31:01

Remove Expand All Collapse All

Requisition / Item Number	Configurable Item Number	Description	Category	Quantity	Unit	Info Record	Net Price	Gross Price	Currency
2000000163 / 1	0001	Cal/Stat/Survey Maint by External Vendor	72000000	1	AU			0.00	INR
2000000163 / 2	0001.AA	Two Coats - Oil Bound Distemper	72000000	3	M2		20,000.00 per 1 M2	20,000.00	INR

Once the tender type is selected, click on the “Edit Selected Drafts” button as shown below.

**Assign Sources of Supply: Step 3 (Review Drafts ( 1 Items))**

Previous Next Process All Drafts Close Process Selected Drafts **Edit Selected Drafts** System Info Create Memory Snapshot

1 Select Requisition 2 Assign Sources of Supply (No Items) 3 **Review Drafts ( 1 Items)** 4 Summary Screen (No Documents)

Created Drafts

Change Selected Draft To Remove

Draft Name	Draft Type	Supplier Number	Supplier	Transaction Type
10100020 22.07.2020 15:31:01	Bid Invitation			ZAT1 : Adv/Opn Tender 1 Env

Details of Selected Drafts 10100020 22.07.2020 15:31:01

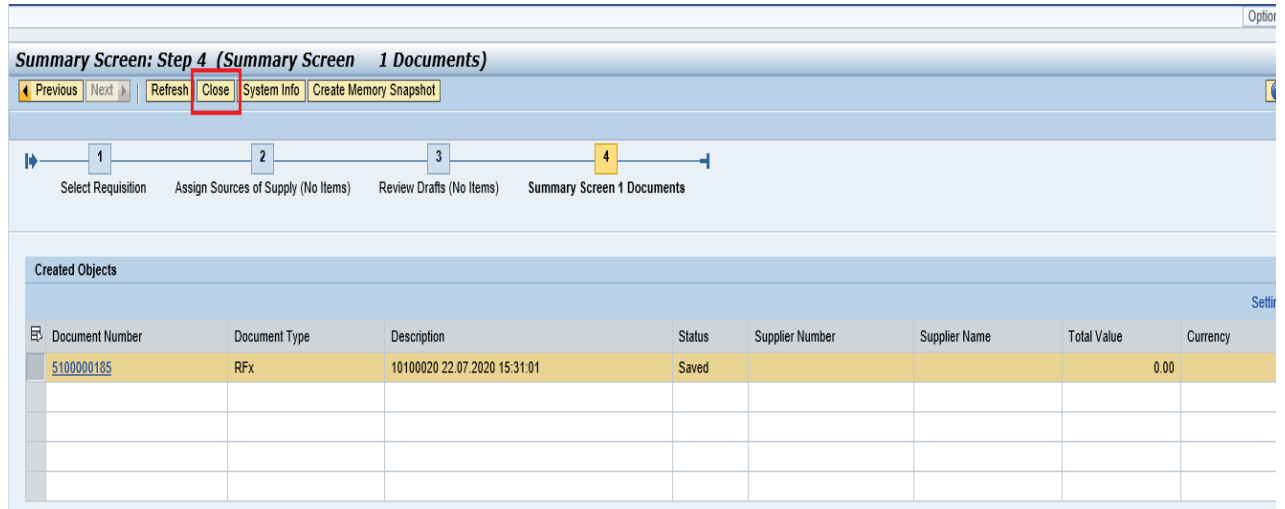
Remove Expand All Collapse All

Requisition / Item Number	Configurable Item Number	Description	Category	Quantity	Unit	Info Record	Net Price	Gross Price	Currency
2000000163 / 1	0001	Cal/Stat/Survey Maint by External Vendor	72000000	1	AU			0.00	INR
2000000163 / 2	0001.AA	Two Coats - Oil Bound Distemper	72000000	3	M2		20,000.00 per 1 M2	20,000.00	INR

## SAP User Manual for Calibration/Statutory/Survey Maintenance

A new window will get opened with all the details required for RFX creation.

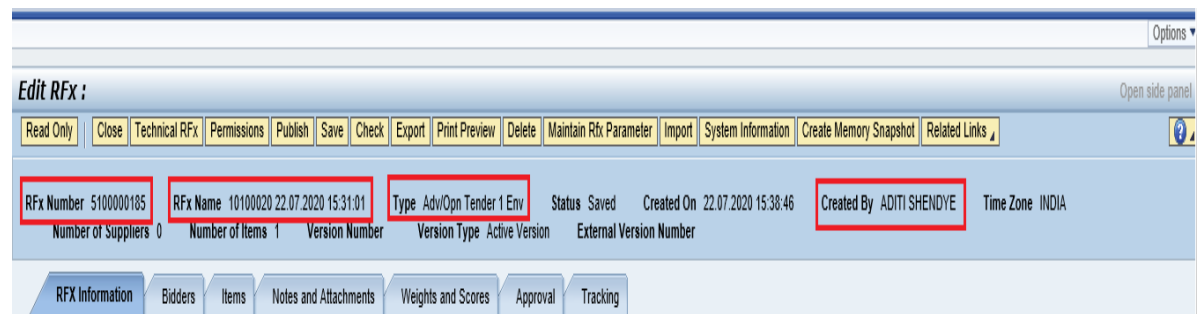
Details are explained in next section#4 – **RFX Creation**. Simultaneously system will automatically move to next step#4. Click on the “Close” button to close this screen.



## RFX Creation - Edit RFX

### RFX Parameters

The RFX screen will be in Edited mode. The RFX number will get generated automatically and it is an incremental unique number generated by system. The panel at the top displays the RFX number, RFX Name (40 characters), type of RFX and created by & creation date and time information. Please see the screenshot below.



The RFX name is defaulted by system in the format of “User Id, Date, Time”. The RFX Name can be modified if required by the Tender Creator with some meaningful short description of the tender.

Please see the screen shot below.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

The screenshot displays the 'Edit RFX' screen in SAP. It includes a menu bar with options like 'Read Only', 'Close', 'Technical RFX', 'Permissions', 'Publish', 'Save', 'Check', 'Export', 'Print Preview', 'Delete', 'Maintain Rfx Parameter', 'Import', 'System Information', 'Create Memory Snapshot', and 'Related Links'. Below the menu, there is a header section with RFX details: RFX Number 510000185, RFX Name 10100020 22.07.2020 15:31:01, Type Adv/Opn Tender 1 Env, Status Saved, Created On 22.07.2020 15:38:46, Created By ADITI SHENOYE, and Time Zone INDIA. The main content area is divided into several sections: Identification (RFx Name, Port Tender No, Tender Description, RFx Type, Publication Type), Event Parameters (Currency, Target Value, Detailed Price Information, Follow-On Document, Bidder Can Change RFX Responses, Allow Multiple RFX Responses for Each Company, Display Weighting to Bidders), Organization (Purchasing Organization, Purchasing Group), Dates (RFx Start Date, RFx Submission Date, Price Rfx Opening Date, Technical RFX Response Opening Date, End of Binding Period, Valid From / To), Tender Fee, Earnest Money Deposit, Security Deposit, and Scenario Award/Contract.

There are various fields provided on the RFX screen as below. Details description of the fields available for maintaining the data is given in table below.

RFX Information → RFX Parameters		
<b>Identification</b>		
Field	Description	Field Status
Port Tender No	Enter the internal port tender number followed by the respective Port.	Editable
Tender Description	This is 256 character in length. Used for entering the long description of the Tender	Editable
RFx Type	Type of Tender	Non-Editable
Publication Type	System Defaulted – Restricted RFX	Editable
<b>Organization</b>		
Purchasing Organization	System defaulted	Non-Editable



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Purchasing Group	System Defaulted	Non-Editable
<b>Dates</b>		
RFX Start Date	Date from which the Tender process will start after it is approved and published	Editable
RFX Submission Date	Date by which the Bidder should submit the response	Editable
Price Rfx Opening Date	RFX Price Opening Date	Editable
Technical RFX Response Opening Date	RFX Technical Opening Date	Editable
Valid From / To	Binding period of the tender	Editable
<b>Event Parameters</b>		
Currency	System Defaulted as INR. Not to be changed	Editable
Target Value	System defaulted based on the estimates in the Purchase requisition. Not to be modified.	Editable
Detailed Price Information	System defaulted. Not to be changed	Editable
Follow-on Document	Defaulted by system. The document to be created i.e. either a Purchase Order or Contract against the L1 bidder response. Not to be changed.	Editable
Bidder can change RFX Response	Will be checked by default. This allows the bidder to change the submitted responses until the RFX submission deadline date is not reached. If unchecked, response once submitted cannot be modified by the Bidder. Not to be changed.	Editable
Allow multiple RFX Response for each company	Will be checked by default. This allows the bidder to change the submitted responses multiple times, until the submission deadline date is not reached. If unchecked, Bidder cannot modify & re-submit the responses. Not to be changed.	Editable
AMC Indicator	Is applicable for the AMC tenders. If checked TCR with ALR/AVR will be generated	Editable



## SAP User Manual for Calibration/Statutory/Survey Maintenance

QSBC	Currently not available	Editable
Tender Fee Required	Check this field if tender fee needs to be collected from the Bidder	Editable
Tender Fee Percentage	Enter the percentage of amount to be collected from the Bidder. System automatically calculates the tender fee and displays in the Tender Fee field	Editable
Tender Fee	Buyer can input the amount here instead of entering the %	Editable
Submission Deadline	Tender Fee is required to be submitted before this Date and Time by the Bidder without which the Bidder will not be able to create & submit the responses	Editable
<b>Earnest Money Deposit</b>		
Required	Check this field if EMD fee needs to be collected from the Bidder	Editable
EMD Percentage	Enter the percentage of amount to be collected from the Bidder. System automatically calculates the EMD fee and displays in the EMD Fee field	Editable
Amount	Buyer can input the amount here instead of entering the EMD %	Editable
Submission Deadline	EMD Fee is required to be submitted before this Date and Time by the Bidder without which the Bidder will not be able to create & submit the responses	Editable
<b>Pre-Bid Meeting</b>		
Pre-Bid Meeting Required	Check this box if pre-bid meeting needs to be conducted with the Bidders.	Editable
Pre-Bid Start Date & Time	Provide the start date & time for the pre-bid meeting to be started	Editable
Pre-Bid End Date & Time	Provide the end date & time for the pre-bid meeting discussion	Editable
Pre-Bid Location	Location of the meeting that was held.	Editable
Pre-Bid Remarks	Mention the concluded points in the column. This is 256 characters in length.	Editable

We are creating this tender for AMC. So check the “AMC Indicator” field as shown below.



# SAP User Manual for Calibration/Statutory/Survey Maintenance

Number	5100000185	RFX Name	10100020 22.07.2020 15:31:01	Type	Adv/Opn Tender 1 Env	Status	Saved	Created On	22.07.2020 15:38:46	Created By	ADITI SHENDYE	Time Zone	INDIA
Number of Suppliers	0	Number of Items	1	Version Number	Version Type	Active Version	External Version Number						

**RFX Information** | Bidders | Items | Notes and Attachments | Weights and Scores | Approval | Tracking

Parameters | Questions | Notes and Attachments

**Identification**

RFX Name: 10100020 22.07.2020 15:31:01  
 Port Tender No: MBPT/2020/07/2201  
 Tender Description: THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.  
 RFX Type: Adv/Opn Tender 1 Env

**Event Parameters**

Currency: INR  
 Target Value: 60,000.00 INR  
 Detailed Price Information: Simple Price  
 Follow-On Document: Purchase Order or Contract  
 Bidder Can Change RFX Responses:   
 AMC Indicator:

Enter all the applicable details required for the tender to be published.

**Edit RFX :**

Read Only | Close | Technical RFX | Permissions | Publish | Save | Check | Export | Print Preview | Delete | Maintain Rfx Parameter | Import | System Information | Create Memory Snapshot | Related Links

RFX Number	5100000185	RFX Name	10100020 22.07.2020 15:31:01	Type	Adv/Opn Tender 1 Env	Status	Saved	Created On	22.07.2020 15:38:46	Created By	ADITI SHENDYE	Time Zone	INDIA
Number of Suppliers	0	Number of Items	1	Version Number	Version Type	Active Version	External Version Number						

**RFX Information** | Bidders | Items | Notes and Attachments | Weights and Scores | Approval | Tracking

RFX Parameters | Questions | Notes and Attachments

**Identification**

RFX Name: 10100020 22.07.2020 15:31:01  
 Port Tender No:  
 Tender Description:  
 RFX Type: Adv/Opn Tender 1 Env  
 Publication Type: Public RFX

**Organization**

Purchasing Organization: Mumbai Port Trust Purchase Organisation  
 Purchasing Group: Material Mgmt Purchase Group [Show Members](#)

**Dates**

RFX Start Date: 00:00:00  
 \* RFX Submission Date: 00:00:00  
 Price Rfx Opening Date: 00:00:00  
 Technical RFX Response Opening Date: 00:00:00  
 End of Binding Period:  
 Valid From / To: -

**Event Parameters**

Currency: INR  
 Target Value: 60,000.00 INR  
 Detailed Price Information: Simple Price  
 Follow-On Document: Purchase Order or Contract  
 Bidder Can Change RFX Responses:   
 Allow Multiple RFX Responses for Each Company:   
 Display Weighting to Bidders:

**Tender Fee**

Required:

**Earnest Money Deposit**

Required:   
 \* Reason for EMD Exclusion:

**Scenario Award/Contract**

Pre-bid Meeting

**Security Deposit**

\* Security Deposit Required:  
 \* Security Deposit Percentage:

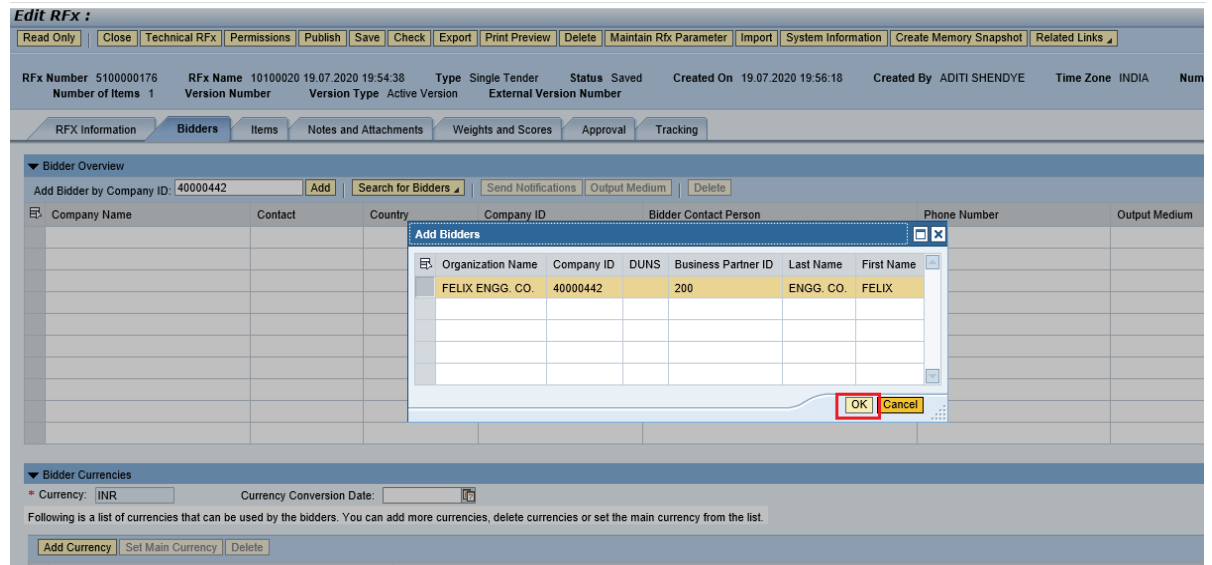
Click on the "Check" button. Any errors will be displayed in red color as highlighted below.



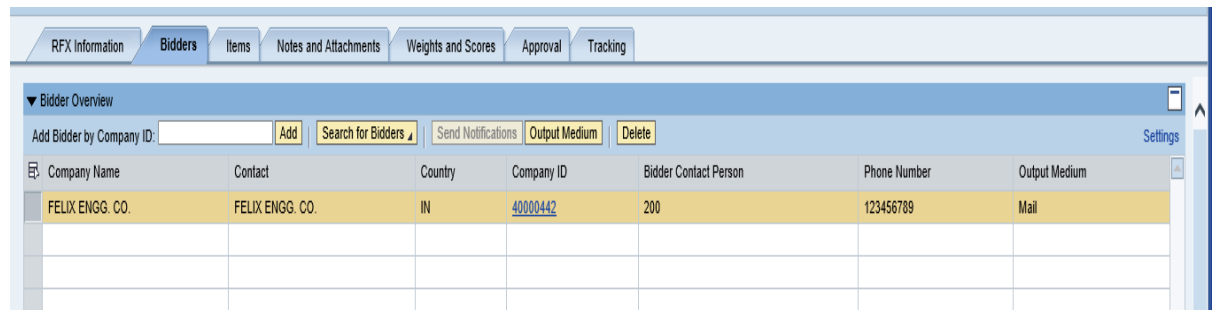


## SAP User Manual for Calibration/Statutory/Survey Maintenance

New confirmation window will be displayed and system will prompt for confirmation. Click on “Ok” button.



Bidder id will get added as shown in screen shot below.



### Maintain RFX Parameters

It's mandatory to maintain RFX parameters for any of the tender type.

Click on the button “Maintain RFX Parameter” as shown below.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

The screenshot shows the 'Edit RFX' screen in SAP. At the top, there is a menu bar with buttons: Read Only, Close, Technical RFX, Permissions, Publish, Save, Check, Export, Print Preview, Delete, Maintain Rfx Parameter (highlighted with a red box), Import, System Information, Create Memory Snapshot, and Related Links. Below the menu bar, the RFX details are displayed: RFX Number 5100000185, RFX Name 10100020 22.07.2020 15:31:01, Type Adv/Opn Tender 1 Env, Status Saved, Created On 22.07.2020 15:38:46, Created By ADITI SHENDYE, Time Zone INDIA. There are also fields for Number of Suppliers (0), Number of Items (1), Version Number, Version Type (Active Version), and External Version Number. Below this, there are tabs for RFX Information, Bidders, Items, Notes and Attachments, Weights and Scores, Approval, and Tracking. Under RFX Information, there are sub-tabs for RFX Parameters, Questions, and Notes and Attachments. The main content area is divided into several sections: Identification (RFX Name, Port Tender No, Tender Description, RFX Type, Publication Type), Event Parameters (Currency, Target Value, Detailed Price Information, Follow-On Document, Bidder Can Change RFX Responses, Allow Multiple RFX Responses for Each Company, Display Weighting to Bidders), Organization (Purchasing Organization, Purchasing Group), Tender Fee, Security Deposit, and Dates (RFX Start Date). A tooltip for the Tender Description field reads: 'THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.'

A new screen will be displayed. User can either add his own questionnaires or it can be selected from the available repository. Click on “Import” button to select questions from available repository. A new window will get displayed. Select multiple questions and then click on “Transfer” button.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

The screenshot shows the SAP 'Please maintain Question' dialog box for Bid No: 5100000185. The 'Import' button is highlighted with a red box. An 'Import' window is open, showing a table of questions to be imported. The 'Transfer' button in the 'Import' window is also highlighted with a red box.

Question	Group	Attachment Required
DO YOU HAVE PREVIOUS WORK EXPERIENCE. UPLOAD DOCUMENTS.	Eligibility Criteria	No
DO YOU HAVE PAN NO	Eligibility Criteria	No
DO YOU HAVE TAN NO.	Eligibility Criteria	No
IN LAST 7 YEARS, EXPERIENCE OF 3 COMPLETED PURCHASE ORDERS OF MINIMUM 4 LAKHS ATTACHED?	Eligibility Criteria	No
WHETHER ANNUAL AVERAGE TURN OVER. FOR LAST 3 YEARS IS ABOVE RS.10/15/50* LAKHS	Eligibility Criteria	No
WHETHER BIS LICENSE HOLDER	Eligibility Criteria	No
WHETHER DOCUMENTS FOR START UP ATTACHED?	Eligibility Criteria	Yes
WHETHER DOWN LOADING CHARGES OF RS.105/- PAID	Eligibility Criteria	No

Click on "Save" and then click on "Close" button to close the window. Please see screenshot below.

The screenshot shows the SAP 'Please maintain Question' dialog box after saving. The 'Save' and 'Close' buttons are highlighted with red boxes. The table below shows the saved data.

S.No	Group	Question	Attachment Required
1	Eligibility Criteria	WHETHER DOCUMENTS FOR START UP ATTACHED?	Yes
2	Eligibility Criteria	DOU YOU HAVE PAN NO	No

Data once saved, below system message will be displayed.

The screenshot shows a system message box with a green checkmark and the text "Data Store successfully...".



## SAP User Manual for Calibration/Statutory/Survey Maintenance

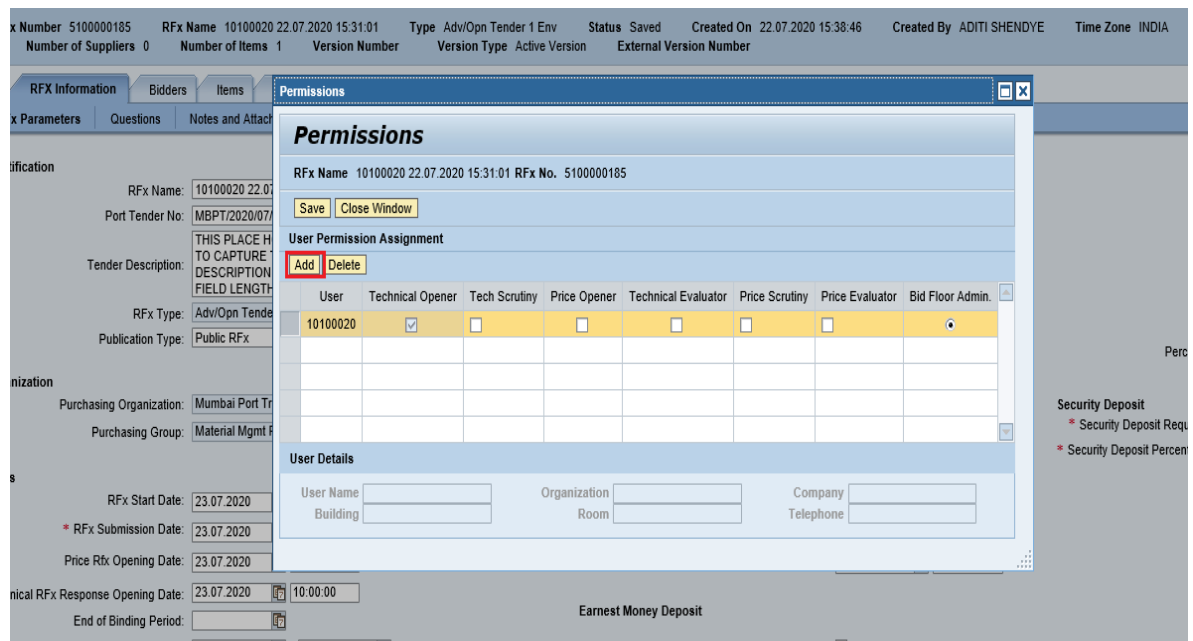
### Maintain Tender Committee

In this section we will see how the tender committee is maintained and will be responsible for performing the technical and commercial scrutiny and evaluation activities.

We have different roles defined in system that decides the activity to be performed by the individual user's.

Click on "Permission" button and add user-ids under the Tech Scrutiny, Price Opener, Tech Evaluator, Price Scrutiny and Price Evaluator roles

Since this is as open tender single envelope bid, we do not require to maintain the technical opener. The "Technical Opener" column is in display mode. System by default will consider the tender creator as an technical opener.



Once you click on "Add" button, Buyer needs to provide the user id and the then click on the "Search" button. System will display the user details. Select the row and then click on "Transfer" button. Please see screenshot below.



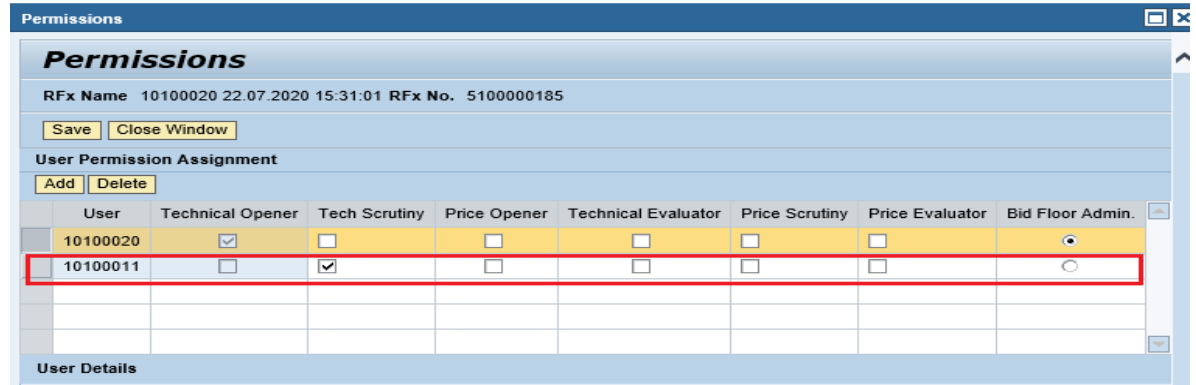
## SAP User Manual for Calibration/Statutory/Survey Maintenance

The screenshot shows the SAP 'Permissions' window. At the top, it displays 'Permissions' and 'RFx Name 10100020 22.07.2020 15:31:01 RFx No. 5100000185'. Below this are 'Save' and 'Close Window' buttons. The 'User Permission Assignment' section contains 'Add' and 'Delete' buttons and a table with columns: User, Technical Opener, Tech Scrutiny, Price Opener, Technical Evaluator, Price Scrutiny, Price Evaluator, and Bid Floor Admin. The first row shows user '10100020' with 'Technical Opener' checked and 'Bid Floor Admin' selected. Below the table is the 'User Details' section with input fields for User Name, Building, Organization, Room, Company, and Telephone. The 'Add User' section has input fields for User Name (containing '10100011'), First Name, and Last Name, with a 'Search' button. At the bottom, another 'User Details' table shows a user with Last Name 'SIDDHASANJAY APHALE', User ID '10100011', and Department '00000000'. A 'Transfer' button is highlighted at the bottom left.

User will be visible in the Permission tab as shown below.



## SAP User Manual for Calibration/Statutory/Survey Maintenance



Similarly, Buyer can add multiple users in the Permission tab and assign appropriate roles for performing the activities in SRM. After adding the user's & assigning respective roles the permission tab details will look like below. Please refer below table for the roles and its functionality.

Permission Tab (Tender Committee)		
Role Name	Role Description	Field Status
Bid Floor Admin	This role is assigned by default to the user creating the Tender i.e. the Buyer. Its recommended not to change	Editable
Technical Opener	User assigned under this role is responsible for opening the technical responses received. In Single Tender process, system will default this role to the Buyer creating the tender.	Non-Editable
Tech Scrutiny	User's responsible for performing the technical scrutiny	Editable
Technical Evaluator	User's responsible for performing the evaluation or reviews on the details submitted by the scrutiny team	Editable
Price Opener	User's responsible for performing the Price opening of the tender's once it is initiated by the Bid Floor Admin	Editable
Price Scrutiny	User's responsible for performing the price scrutiny	Editable
Price Evaluator	User's responsible for performing the evaluation or reviews on the details submitted by the scrutiny team	Editable



## SAP User Manual for Calibration/Statutory/Survey Maintenance

**Permissions**

RFx Name 10100020 22.07.2020 15:31:01 RFx No. 5100000185

Permissions updated successfully

**User Permission Assignment**

User	Technical Opener	Tech Scrutiny	Price Opener	Technical Evaluator	Price Scrutiny	Price Evaluator	Bid Floor Admin.
10100020	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10100011	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10100012	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10100013	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10100024	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10100016	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10100019	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10100017	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**User Details**

User Name  Organization  Company   
 Building  Room  Telephone

### Item Tab

Click on the “Items” tab of the RFx document. This tab contains all the BOQ items mentioned in the purchase requisition. All the items will be replicated from the purchase requisition automatically

To see the details of the item’s click on the “Details” button. System will display all the details pertaining to the material / services as shown in the screenshot below.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

The screenshot displays the SAP RFX (Request for Quote) interface. At the top, the 'Display RFX:' header includes a toolbar with options like Edit, Close, Technical RFX, Copy, Check, Export, Print Preview, Maintain Rfx Parameter, System Information, Create Memory Snapshot, and Related Links. Below this, a summary bar shows RFX Number 5100000185, RFX Name 10100020 22.07.2020 15:31:01, Type Adv/Opn Tender 1 Env, Status Saved, Created On 22.07.2020 15:38:46, Created By ADITI SHENDYE, and Time Zone INDIA. The 'Items' tab is selected and highlighted with a red box. The 'Item Overview' section shows a table with columns for Line Number, Item Type, Product ID, Description, Lot, Allow RFX Response Modification, Variant, Product Category, Quantity, Unit, Currency, Delivery Date, Notes, Attachments, and Internal Item. Two items are listed: an Outline item 'Cal/Stat/Survey Maint by External Vendor' and a Service item 'Two Coats - Oil Bound Distemper'. The 'Details' button for the selected item is also highlighted with a red box. Below the table, the 'Item : Two Coats - Oil Bound Distemper' details are shown, including Identification (Control Key: Service functional, Item Type: Service, Product ID: 8300000085, Description: Two Coats - Oil Bound Distemper, Product Category: 72000000 Construction Service) and Currency, Values and Pricing (Currency: INR, Quantity/Unit: 3 M2). The Service and Delivery section shows Delivery Date: From 31.12.2021.

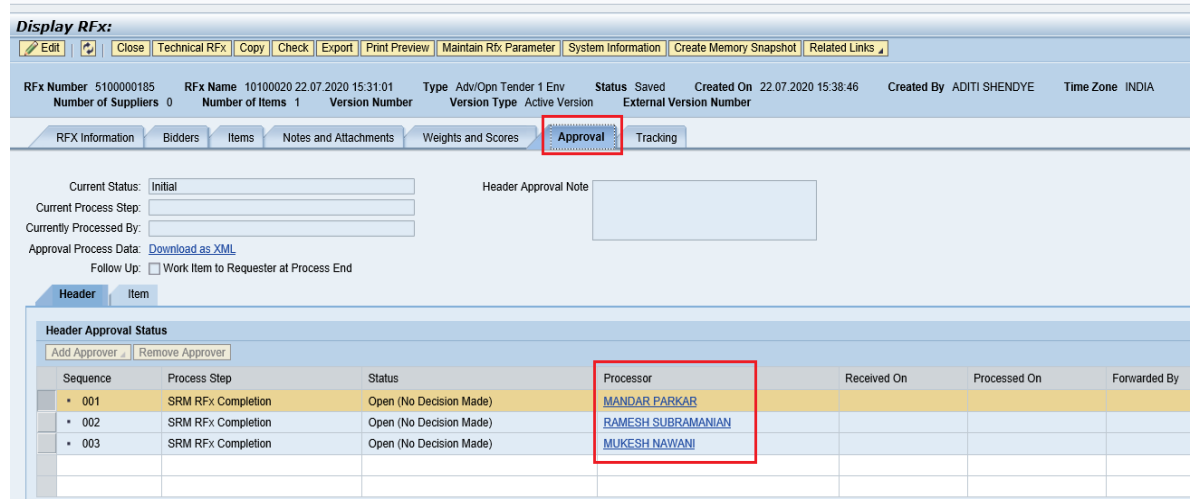
### Approval Tab

Under this tab, Buyer will be able to see the Approver's determined by the system. Depending on the value and type of the Tender the levels of approvals may vary.

Please see screenshot below.



## SAP User Manual for Calibration/Statutory/Survey Maintenance



### C-Folder Attachment

Before publishing the tender’s there are many supporting documents to be uploaded. Such as NIT document, Technical Specifications, Drawings etc. These documents are useful for the Bidder to understand the requirements and submit the technical and commercial responses accordingly. Please refer below table detailing about the standard folder’s available for uploading the documents and their purpose.

C-Folder		
Folder	Folder Description	Used By
External Area	Contains documents that are to be shared with the RFX respondents. NIT document has to be uploaded in the this area.	Buyer/Tender Creator
Collaboration	Used by RFX respondents and evaluators to exchange information, for example, the RFX respondents can ask questions that are answered by the evaluators.	Buyer / Bidder
Internal Area	Contains documents that are only to be viewed by users from the purchasing organization.	Port Users
Evaluation	Contains evaluator comments	Evaluators
Technical Bid	When the RFX respondent creates an RFX response, a folder is created under Technical_Bids in which the RFX respondent can store technical RFX response documents.	Bidder

To upload the documents in C-folder and digitally sign the uploaded documents, click on the “Notes and Attachment” tab located under “RFX Parameter” option. Scroll down and click on “Add Attachment” button





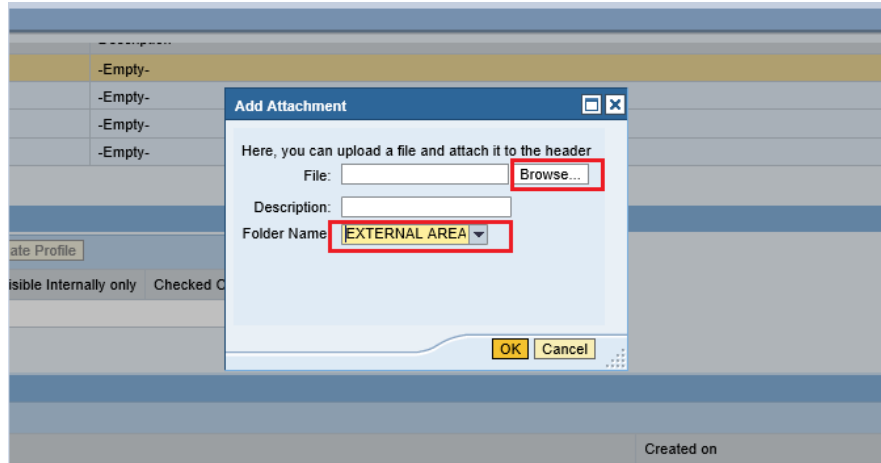
## SAP User Manual for Calibration/Statutory/Survey Maintenance

Please see the screenshot below.

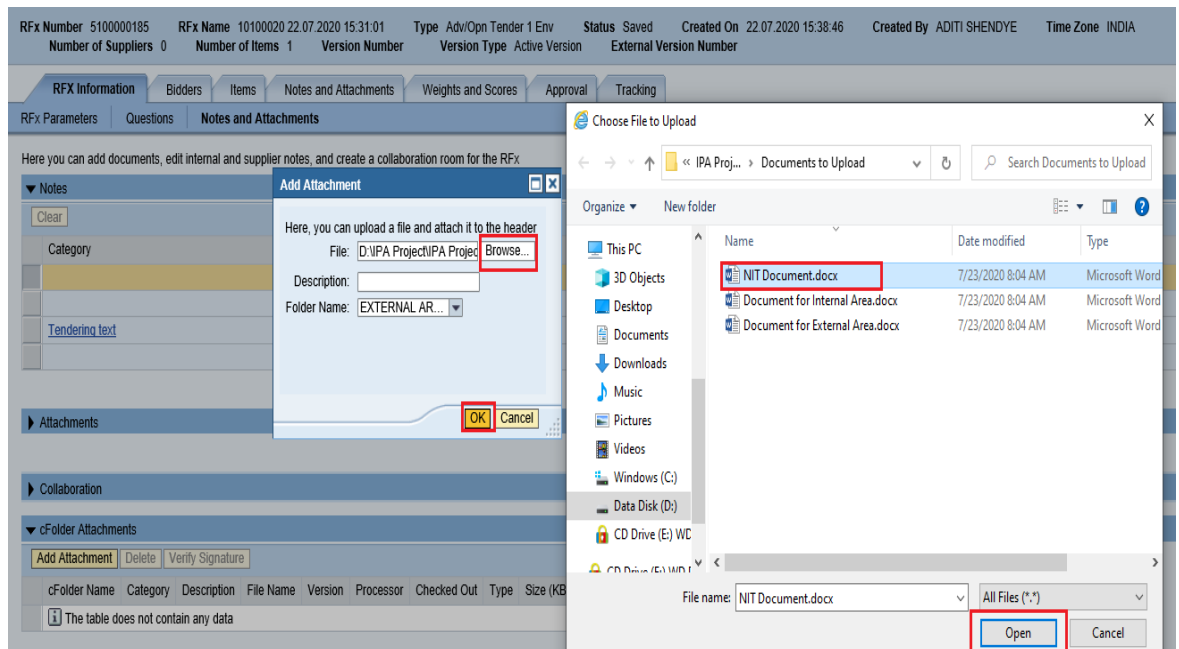
The screenshot shows the SAP 'Edit RFx' interface. At the top, there is a navigation bar with buttons like 'Read Only', 'Close', 'Technical RFx', 'Permissions', 'Publish', 'Save', 'Check', 'Export', 'Print Preview', 'Delete', 'Maintain Rfx Parameter', 'Import', 'System Information', 'Create Memory Snapshot', and 'Related Links'. Below this, a header section displays RFx details: RFx Number 5100000185, RFx Name 10100020 22.07.2020 15:31:01, Type Adv/Opn Tender 1 Env, Status Saved, Created On 22.07.2020 15:38:46, Created By ADITI SHENDYE, and Time Zone INDIA. It also shows 'Number of Suppliers 0', 'Number of Items 1', 'Version Number', 'Version Type Active Version', and 'External Version Number'. The main area has several tabs: 'RFx Information', 'Bidders', 'Items', 'Notes and Attachments' (highlighted with a red box), 'Weights and Scores', 'Approval', and 'Tracking'. Under 'Notes and Attachments', there are sub-tabs: 'RFx Parameters', 'Questions', and 'Notes and Attachments' (highlighted with a red box). A message states: 'Here you can add documents, edit internal and supplier notes, and create a collaboration room for the RFx'. Below this, there is a 'Notes' section with a 'Clear' button and a table with columns 'Category' and 'Description'. The table has four rows, all with '-Empty-' in the 'Description' column. One row has 'Tendering text' in the 'Category' column. Below the table are sections for 'Attachments', 'Collaboration', and 'cFolder Attachments' (highlighted with a red box). In the 'cFolder Attachments' section, there is an 'Add Attachment' button (highlighted with a red box), a 'Delete' button, and a 'Verify Signature' button. A 'Filter Settings' link is also present.

A new window will be displayed and system prompts to select the folder in which the document has to be uploaded. Select “External Area” and then click on “Browse” button as shown in the screenshot below.

## SAP User Manual for Calibration/Statutory/Survey Maintenance

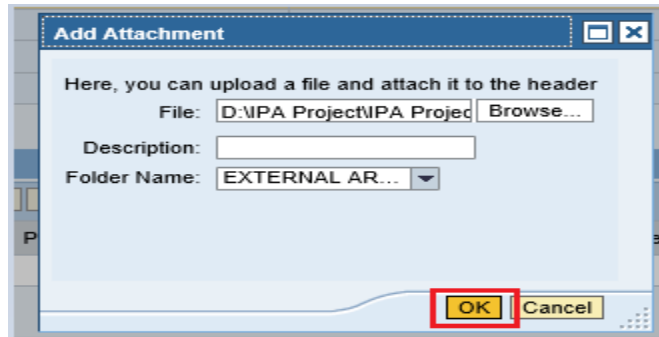


Select the document from the respective folder on your PC/Laptop and then click on the “Open” button.

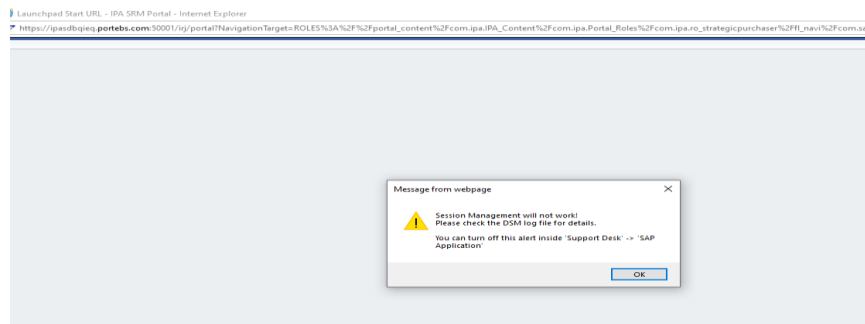


Once the file is uploaded the screen will be displayed as below. Click on “Ok” button to proceed further.

## SAP User Manual for Calibration/Statutory/Survey Maintenance

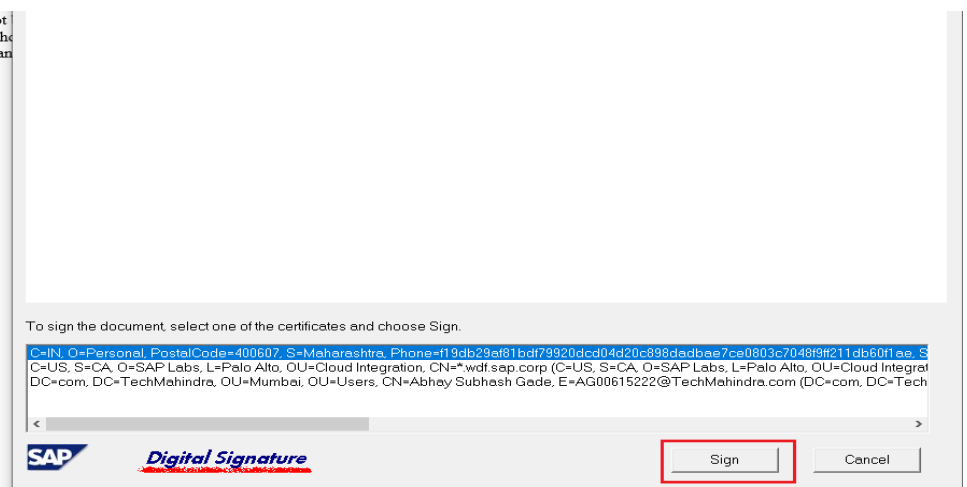


System prompts for digitally signing the uploaded document. A window will be prompted and then click on “Ok” button as shown in screenshot below.



Another window will be prompted, where the buyer needs to select the correct digital signature and then click on “Sign” button.

- The signed document cannot
- Unable to determine the auth
- The document's signature can



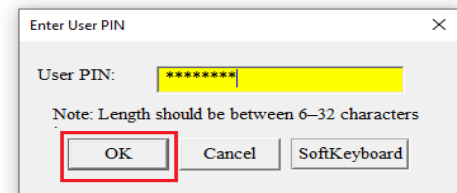
## SAP User Manual for Calibration/Statutory/Survey Maintenance

Enter the password in the window prompted and then click on “Ok” button.

### Digital Signature

Use the document's digital signature with your personal key to ensure the following properties.

- The signed document cannot be changed later (integrity).
- Unable to determine the author of the signature (authenticity).
- The document's signature cannot be disputed later (binding).



Once the password is successfully verified, system will display a confirmation window. Click on “Ok” button as shown below.



Similarly, Buyer can add multiple documents following the same steps. The size of the individual file should not exceed 5 mb. Buyer can upload multiple documents in the External Area folder and Collaboration folder as shown below.

All the uploaded documents need to be digitally signed by the Buyer.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Number of Suppliers 0    Number of Items 1    Version Number    Version Type    Active Version    External Version Number

RFx Information    Bidders    Items    Notes and Attachments    Weights and Scores    Approval    Tracking

RFx Parameters    Questions    Notes and Attachments

Here you can add documents, edit internal and supplier notes, and create a collaboration room for the RFx

▼ Notes Filter Settings

Clear

Category	Description
	-Empty-
	-Empty-
<a href="#">Tendering text</a>	-Empty-
	-Empty-

▶ Attachments Filter Settings

▶ Collaboration Filter Settings

▼ cFolder Attachments Filter Settings

Add Attachment    Delete    Verify Signature

cFolder Name	Category	Description	File Name	Version	Processor	Checked Out	Type	Size (KB)	Changed by	Changed on
EXTERNAL AREA	Standard Attachment	<a href="#">NIT Document</a>	NIT Document.docx.sig	1		<input type="checkbox"/>	sig	14	10100020	23.07.2020
INTERNAL AREA	Standard Attachment	<a href="#">Document for Internal Area</a>	Document for Internal Area.docx.sig	1		<input type="checkbox"/>	sig	14	10100020	23.07.2020
EXTERNAL AREA	Standard Attachment	<a href="#">Document for External Area</a>	Document for External Area.docx.sig	1		<input type="checkbox"/>	sig	14	10100020	23.07.2020

### Tracking Tab

Under this tab, Buyer can check all the history related to this RFx i.e. the Backend purchase requisition, Shopping Cart that got created against this backend document and the RFx that has been created.

Any changes to the RFx can be seen here in this tab under the “Version Overview” option.

All the updates can be checked under this tab. Please see screenshot below.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

**Display RFX:**

RFX Number: 5100000185    RFX Name: 10100020 22.07.2020 15:31:01    Type: Adv/Opn Tender 1 Env    Status: Saved    Created On: 22.07.2020 15:38:46    Created By: ADITI SHENDYE    Time Zone: INDIA  
 Number of Suppliers: 0    Number of Items: 1    Version Number:    Version Type: Active Version    External Version Number:

RFX Information    Bidders    Items    Notes and Attachments    Weights and Scores    Approval    **Tracking**

▼ History

View: Indian Rupee

Document	Name	Document Number	Back-End Document Number	Status	Date
External Requirement	PI_USER 19.07.2020 15:13	<a href="#">2000000163</a>	2001000962	Approved	19.07.2020
RFX	10100020 22.07.2020 15:31:01	<a href="#">5100000185</a>		Saved	22.07.2020

▼ Status

System Status  
Held > Created > Complete

▼ Version Overview

Detail Compare

Version	Document/Version Type	Created On	Changed On	Document Name	External Version Number
	Active Document	22.07.2020 15:38:46	23.07.2020 08:13:32	10100020 22.07.2020 15:31:01	

▼ Change Documents

Changed Since    
  Changed From/To     
 Search   
 [Expand All](#)   
[Collapse All](#)   
[Hide Query](#)   
[Filter](#)   
[Settings](#)

### Publish RFX with Digital Signature

Once all the details are entered in the RFX click on the “Check” button. If there is any mandatory information left out to be filled, system will display an error message in red color. Else system will display message as below in green color.

“RFX is complete and contains no errors”

Please ensure that you have inserted the digital signature token in your PC/Laptop USB.

Click on “Publish” button as shown in screenshot below.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

**Edit RFX :** Open side panel

Read Only | Close | Technical RFX | Permissions | **Publish** | Save | Check | Export | Print Preview | Delete | Maintain Rfx Parameter | Import | System Information | Create Memory Snapshot | Related Links

Enter at least one partner of type Bidder Or Portal Provider

RFX Number: S100000185 | RFX Name: 10100020 22.07.2020 15:31:01 | Type: Adv/Opn Tender 1 Env | Status: Saved | Created On: 22.07.2020 15:38:46 | Created By: ADITI SHENDYE | Time Zone: INDIA

Number of Suppliers: 0 | Number of Items: 1 | Version Number: | Version Type: Active Version | External Version Number:

Navigation: RFX Information | Bidders | Items | Notes and Attachments | Weights and Scores | Approval | Tracking

Sub-tabs: RFX Parameters | Questions | Notes and Attachments

**Tender Description:** TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.

**RFX Type:** Adv/Opn Tender 1 Env

**Publication Type:** Public RFX

**Organization:** Purchasing Organization: Mumbai Port Trust Purchase Organisation | Purchasing Group: Material Mgmt Purchase Group | [Show Members](#)

**Dates:** RFX Start Date: 23.07.2020 09:30:00 | \* RFX Submission Date: 23.07.2020 11:00:00 | Price Rfx Opening Date: 23.07.2020 11:00:00 | Technical RFX Response Opening Date: 23.07.2020 11:00:00 | End of Binding Period: | Valid From / To: 23.07.2020 - 19.01.2021

**Follow-On Document:** Purchase Order or Contract

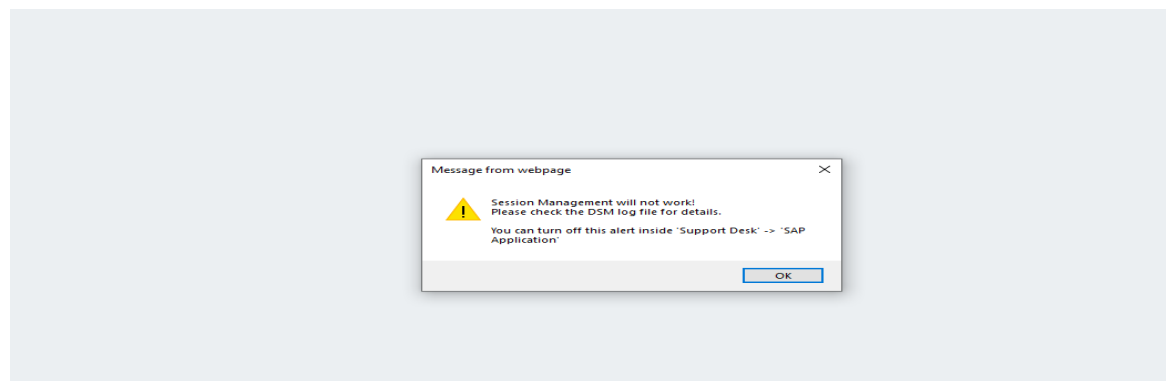
**Checkboxes:** Bidder Can Change RFX Responses:  | Allow Multiple RFX Responses for Each Company:  | Display Weighting to Bidders:  | AMC Indicator:  | OSBC:  | Percentage Bidding:  | Security Deposit Required:  | Security Deposit Percentage: 8

**Tender Fee:** Required:  | Tender Fee Percentage: 2 | \* Tender Fee: 1,200.00 INR

**Submission Deadline:** 23.07.2020 10:20:00

**Earnest Money Deposit:** Required:  | FMD Percentage: 5

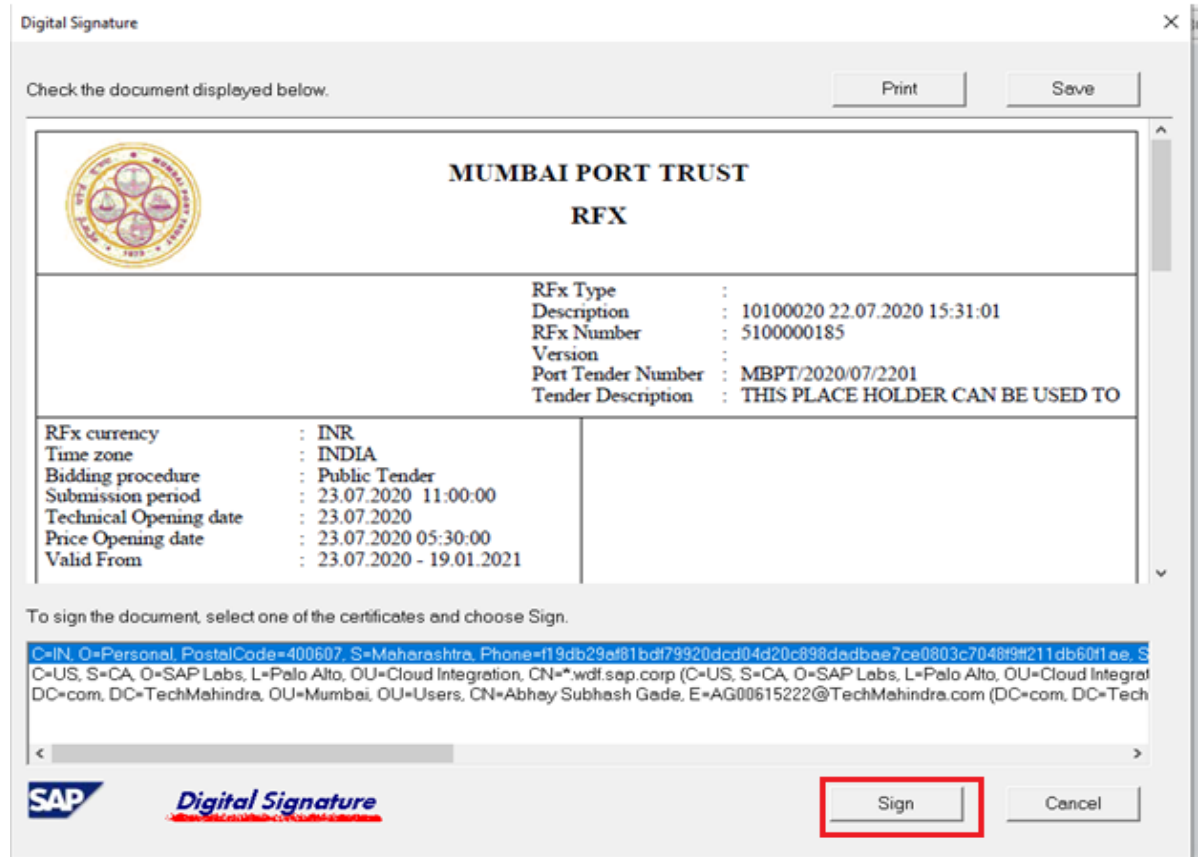
Once you click on this button as pop-up window will be displayed as below. Click on “Ok” button.



A new window will be displayed prompting the select the digital signature. Select the signature and click on “Sign” button as shown in screenshot below.



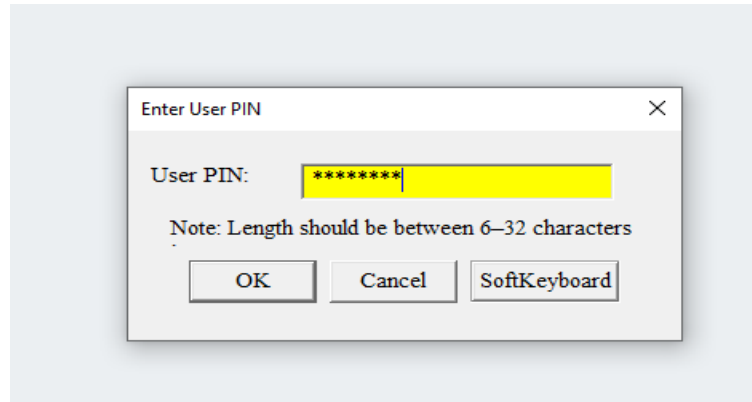
## SAP User Manual for Calibration/Statutory/Survey Maintenance



System further prompts to enter the password. Input the password and click on “Ok” button as highlighted in below screenshot.

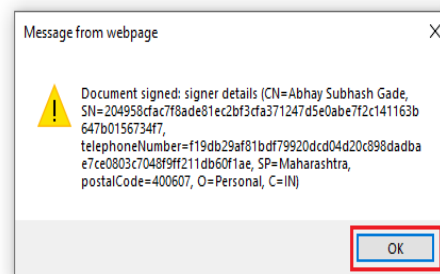


## SAP User Manual for Calibration/Statutory/Survey Maintenance



Again system will prompt a new pop-up window with the message that the RFX has been digitally signed by the user. See the screenshot below.

[https://ipasapqimq.portebs.com:4302/sap\(bD11biZjPTUwMCZwPTMOMjE0NjY9Ny41MCZpPTE=\)/bc/bsp/sapsrm/call\\_sig\\_ctrl/signature.htm?onInputProcessing=SIGNATURE&sap-params=c3NmX3Nlc3NfaW](https://ipasapqimq.portebs.com:4302/sap(bD11biZjPTUwMCZwPTMOMjE0NjY9Ny41MCZpPTE=)/bc/bsp/sapsrm/call_sig_ctrl/signature.htm?onInputProcessing=SIGNATURE&sap-params=c3NmX3Nlc3NfaW)



System displays message as "RFX xxxxx xxxx xxxx has been published".

Please note that by clicking on Publish button, this RFX will not be available for the Bidder to create response.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Based on the approvers maintained, system will follow the approval process. Once the RfX is approved at all the levels then only it will be available to Bidder to submit his responses.

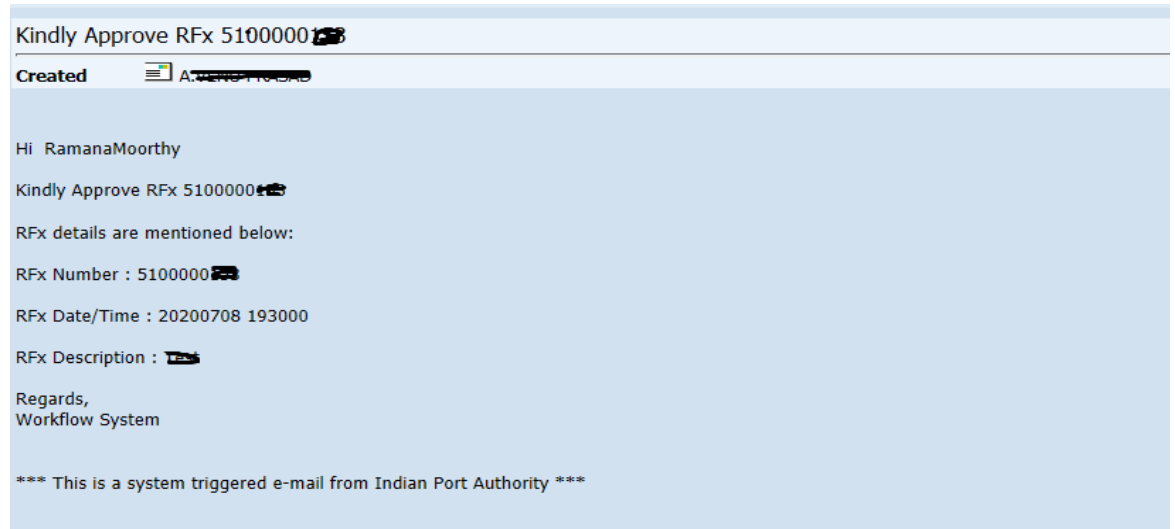
As seen in the screenshot below the status of RfX is “Awaiting Approval”

The screenshot displays the SAP RfX (Request for Quote) details page. At the top, there is a navigation bar with buttons for 'Edit', 'Close', 'Technical RfX', 'Show my Tasks', 'Copy', 'Check', 'Discharge RfX', 'Export', 'Print Preview', 'Maintain RfX Parameter', 'System Information', 'Create Memory Snapshot', and 'Related Links'. Below this, a green message states: 'RfX 10100020 22.07.2020 15:31:01- 5100000185 has been published'. The main header area shows the RfX Number (5100000185), RfX Name (10100020 22.07.2020 15:31:01), Type (Adv/Opn Tender 1 Env), and Status (Awaiting Approval, highlighted with a red box). Other details include Created On (22.07.2020 15:38:46), Created By (ADITI SHENDYE), and Time Zone (INDIA). The page is divided into several tabs: 'RfX Information', 'Bidders', 'Items', 'Notes and Attachments', 'Weights and Scores', 'Approval', and 'Tracking'. The 'RfX Information' tab is active, showing various parameters such as Tender Description, RfX Type, Publication Type, Organization, Dates, Tender Fee, and Security Deposit. The 'Status' field is highlighted with a red box, indicating the current state of the RfX.

System will trigger email to the approvers as shown in screenshot below.



## SAP User Manual for Calibration/Statutory/Survey Maintenance



### Approving the RFx

Please follow the step mentioned under Section 1.1 EBS Portal for logging to EBS portal. Once the approver is redirected to the SRM portal through SSO, below SR screen will be displayed.

Select “Home” tab and the click on “Work Overview” link. Go to the “Tasks” tab. Here all the documents which are pending for approval will be visible.

Select the appropriate document and click on the link as shown in screenshot below.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

The screenshot shows the E-Procurement Portal interface. The top navigation bar includes 'Home' and 'Strategic Purchasing'. The main content area displays a 'Tasks (10 / 10)' tab. Below the tab, there are filters for 'Show: New and In Progress Tasks (10 / 10)' and 'All'. A table of tasks is shown with columns for Subject, Sent Date, Due Date, and Status. The first row is highlighted in yellow and has a red box around it.

Subject	Sent Date	Due Date	Status
<a href="#">Approve RFx Number 5100000185</a>	Today		New
<a href="#">Approve RFx Number 5100000131</a>	Jul 2, 2020		New
<a href="#">Approve RFx Number 5100000123</a>	Jun 26, 2020		New
<a href="#">Approve RFx Number 5100000098</a>	Jun 21, 2020		New
<a href="#">Approve RFx Number 5100000097</a>	Jun 21, 2020		New
<a href="#">Approve RFx Number 5100000108</a>	Jun 21, 2020		New
<a href="#">Approve RFx Number 5100000107</a>	Jun 21, 2020		New
<a href="#">Approve RFx Number 5100000104</a>	Jun 21, 2020		New
<a href="#">Approve RFx Number 5100000100</a>	Jun 21, 2020		New
<a href="#">Approve RFx Response 10100021 16.06.2020 22:55:11 Number 6100000064</a>	Jun 17, 2020		New

A new window will be opened. The RFx details will be visible in display mode. Approver will not be able to modify or change the tender created by the Buyer.

Click on **“Approve”** button to approve the RFx. In this case the RFx will be approved and will move to the next stage of approver.

Click on **“Reject”** button to reject the RFx. If the RFx is rejected, approver needs to input the reason for rejection. This document will go back to the tender creator i.e the Buyer.

Buyer needs to take appropriate action and re-trigger the workflow again.



# SAP User Manual for Calibration/Statutory/Survey Maintenance

**Approve RFX :**

Approve Reject Close Inquire Save Export Print Preview Delete System Information Create Memory Snapshot Related Links

RFX Number 510000185 RFX Name 10100020 22.07.2020 15:31:01 Type Adv/Opn Tender 1 Env Status Awaiting Approval Created On 22.07.2020 15:38:46 Created By ADITI SHENDYE Time Zone INDIA

Number of Suppliers 0 Number of Items 1 Version Number Version Type Active Version External Version Number

RFX Information Bidders Items Notes and Attachments Weights and Scores Approval Tracking

RFX Parameters Questions Notes and Attachments

**Identification**

RFX Name: 10100020 22.07.2020 15:31:01  
 Port Tender No: MBPT/2020/07/2201  
 Tender Description: THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.  
 RFX Type: Adv/Opn Tender 1 Env  
 Publication Type: Public RFX

**Event Parameters**

Currency: INR  
 Target Value: 60,000.00 INR  
 Detailed Price Information: Simple Price  
 Follow-On Document: Purchase Order or Contract  
 Bidder Can Change RFX Responses:   
 Allow Multiple RFX Responses for Each Company:   
 Display Weighting to Bidders:   
 AMC Indicator:   
 OSBC:   
 Percentage Bidding:

**Organization**

Purchasing Organization: Mumbai Port Trust Purchase Organisation  
 Purchasing Group: Material Mgmt Purchase Group [Show Members](#)

**Tender Fee**

Required:   
 Tender Fee Percentage: 2  
 \* Tender Fee: 1,200.00 INR  
 Submission Deadline: 23.07.2020 10:20:00

**Security Deposit**

\* Security Deposit Required:   
 \* Security Deposit Percentage: 8

**Dates**

RFX Start Date: 23.07.2020 09:30:00  
 \* RFX Submission Date: 23.07.2020 11:00:00  
 Price Rfx Opening Date: 23.07.2020 11:00:00

Once the RFX is approved message "Publication of RFX (Number 51xxxxxxx) was approved, as shown in the screenshot below.

**Display RFX:**

Close Technical RFX Show my Tasks Copy Check Discharge RFX Export Print Preview Maintain Rfx Parameter System Information Create Memory Snapshot Related Links

Publication of RFX (Number 510000185 ) was approved

RFX Number 510000185 RFX Name 10100020 22.07.2020 15:31:01 Type Adv/Opn Tender 1 Env Status Awaiting Approval Created On 22.07.2020 15:38:46 Created By ADITI SHENDYE Time Zone INDIA

Number of Suppliers 0 Number of Items 1 Version Number Version Type Active Version External Version Number

RFX Information Bidders Items Notes and Attachments Weights and Scores Approval Tracking

RFX Parameters Questions Notes and Attachments

**Identification**

RFX Name: 10100020 22.07.2020 15:31:01  
 Port Tender No: MBPT/2020/07/2201  
 Tender Description: THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.  
 RFX Type: Adv/Opn Tender 1 Env  
 Publication Type: Public RFX

**Event Parameters**

Currency: INR  
 Target Value: 60,000.00 INR  
 Detailed Price Information: Simple Price  
 Follow-On Document: Purchase Order or Contract  
 Bidder Can Change RFX Responses:   
 Allow Multiple RFX Responses for Each Company:   
 Display Weighting to Bidders:   
 AMC Indicator:   
 OSBC:   
 Percentage Bidding:

**Organization**

Purchasing Organization: Mumbai Port Trust Purchase Organisation  
 Purchasing Group: Material Mgmt Purchase Group [Show Members](#)

**Tender Fee**

Required:   
 Tender Fee Percentage: 2  
 \* Tender Fee: 1,200.00 INR  
 Submission Deadline: 23.07.2020 10:20:00

**Security Deposit**

\* Security Deposit Required:   
 \* Security Deposit Percentage: 8

**Dates**

RFX Start Date: 23.07.2020 09:30:00  
 \* RFX Submission Date: 23.07.2020 11:00:00  
 Price Rfx Opening Date: 23.07.2020 11:00:00  
 Technical RFX Response Opening Date: 23.07.2020 11:00:00

**Earnest Money Deposit**

Required:



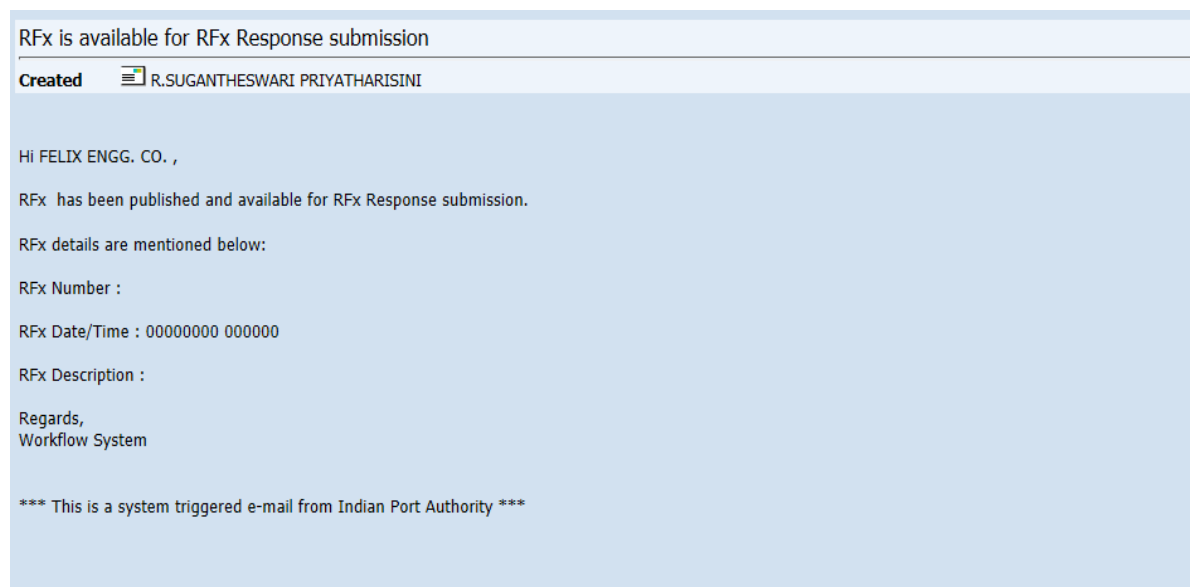
## SAP User Manual for Calibration/Statutory/Survey Maintenance

Documents approved will disappear from the “Tasks” tab.

Similarly, the remaining approvers can follow the above mentioned steps and approve the RFx.

RFx once approved at all the stages, the status will change to “Published” from “Awaiting Approval”

A mail will be triggered to the Supplier about the publication of the RFx. See the screenshot below.



### Data Masking Bidder Data Masking

Until the RFx submission deadline date and time is arrived, the Bidder data will be masked. Buyer will not be able to know who the Bidders have participated in the advertisement / open tenders.



# SAP User Manual for Calibration/Statutory/Survey Maintenance

RFX Number 510000185 RFX Name 10100020 22.07.2020 15:31:01 Type Adv/Opn Tender 1 Env Status Published Created On 22.07.2020 15:38:46 Created By ADITI SHENDYE Time Zone INDIA  
 Number of Suppliers 3 Number of Items 1 Version Number 1 Version Type Active Version External Version Number 1

**RFX Information** Bidders Items Notes and Attachments Weights and Scores Approval Tracking

RFX Parameters Questions Notes and Attachments

**Identification**

RFX Name: 10100020 22.07.2020 15:31:01  
 Port Tender No: MBPT/2020/07/2201  
 Tender Description: THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.  
 RFX Type: Adv/Opn Tender 1 Env  
 Publication Type: Public RFX

**Event Parameters**

Currency: INR  
 Target Value: 60,000.00 INR  
 Detailed Price Information: Simple Price  
 Follow-On Document: Purchase Order or Contract  
 Bidder Can Change RFX Responses:   
 Allow Multiple RFX Responses for Each Company:   
 Display Weighting to Bidders:   
 AMC Indicator:   
 OSBC:   
 Percentage Bidding:

**Organization**

Purchasing Organization: Mumbai Port Trust Purchase Organ  
 Purchasing Group: Material Mgmt Purchase Group

**Dates**

RFX Start Date: 23.07.2020 09:30:00  
 \* RFX Submission Date: 23.07.2020 11:00:00  
 Price Rfx Opening Date: 23.07.2020 11:00:00  
 Technical RFX Response Opening Date: 23.07.2020 11:00:00  
 End of Binding Period:  
 Valid From / To: 23.07.2020 - 19.01.2021

**Bidders** Items Notes and Attachments Weights and Scores Approval Tracking

**Bidder Overview**

Add Bidder by Company ID: Add Search for Bidders Send Notifications Output Medium Delete

Company Name	Contact	Country	Company ID	Bidder Contact Person
XXXXXXXXXX	XXXXXXXXXX	XX	XXXX	XXXX
XXXXXXXXXX	XXXXXXXXXX	XX	XXXX	XXXX
XXXXXXXXXX	XXXXXXXXXX	XX	XXXX	XXXX

Required:

## Tender Fee / EMD Fee Data Masking

Similarly, then Tender and EMD fee payment data will also be in masked status until the RFX submission deadline date and time is arrived.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

RFx - IPA SRM Portal - Internet Explorer

https://ipabqieq.portebts.com:50001/rijj/portal?NavigationTarget=ROLES%3A%2F%2Fportal\_content%2Fcom.ipa.IPA\_Content%2Fcom.ipa.Portal\_Roles%2Fcom.ipa.ro\_strategicpurchaser%2F%2Fnavi%2Fcom.sap.pct.srm.core.iv\_display\_rfqs&Prev/Nav/Target=...

Options

**Display RFx :** Open side panel

Edit Close Technical RFx Permissions Copy Check Discharge RFx Responses and Awards Create Follow-on RFx Export Print Preview Verify Signature Questions and Answers ( 0 ) Maintain RFx Parameter

System Information Create Memory Snapshot Related Links

Supplier Evaluation  
Tender Fee Payment Details  
EMD Payment Details  
Create Bidder

RFx Number 510000185 RFx Name 10 Type Adv/Opn Tender 1 Env Status Published Created On 22.07.2020 15:38:46 Created By ADITI SHENDYE Time Zone INDIA

Number of Suppliers 3 Number of 1 Version Type Active Version External Version Number 1

RFx Information Bidders Items Notes and Attachments Weights and Scores Approval Tracking

RFx Parameters Questions Notes and Attachments

**Identification**

RFx Name: 10100020.22.07.2020.15:31:01  
Port Tender No: MBPT/2020/07/2201  
Tender Description: THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.  
RFx Type: Adv/Opn Tender 1 Env  
Publication Type: Public RFx

**Event Parameters**

Currency: INR  
Target Value: 60,000.00 INR  
Detailed Price Information: Simple Price  
Follow-On Document: Purchase Order or Contract  
Bidder Can Change RFx Responses:   
Allow Multiple RFx Responses for Each Company:   
Display Weighting to Bidders:   
AMC Indicator:   
QSBC:   
Percentage Bidding:

**Organization**

Purchasing Organization: Mumbai Port Trust Purchase Organisation  
Purchasing Group: Material Mgmt Purchase Group [Show Members](#)

**Tender Fee**

Security Deposit  
\* Security Deposit Required:   
\* Security Deposit Percentage: 8

Tender Fee Payment Details in masked status

**Tender Fee Payment Details**

RFx Name 10100020.22.07.2020.15:31:01 RFx No. 510000185 Submission Deadline 23.07.2020 10:20:00 Time Zone INDIA

Save Close Window

Tender Fee Payment Details Edit Details

Company Name	Contact	Payment Method	Amount	Currency	Instrument Number	Payment / Waived Date	Payment / Waived Time	Payment Status
XXXXX	XXXXX	XXXXX	1,200.00	XXX	XXXXX	XX.XX.XXXX	XX:XX:XX	Waived
XXXXX	XXXXX	XXXXX	1,200.00	XXX	XXXXX	XX.XX.XXXX	XX:XX:XX	Paid
XXXXX	XXXXX	XXXXX	1,200.00	XXX	XXXXX	XX.XX.XXXX	XX:XX:XX	Paid

EMD Payment Details in masked status





## SAP User Manual for Calibration/Statutory/Survey Maintenance

**EMD Payment Details**

Rfx Name 10100020 22.07.2020 15:31:01      Rfx No. 5100000185      Submission Deadline 23.07.2020 10:20:00      Time Zone INDIA

Save    Close Window

**EMD Payment Details**

Edit    Details

Company Name	Contact	Payment Method	Amount	Currency	Instrument Number	Payment / Waived Date	EMD Reversal	Reversal Date	Status
XXXXX	XXXXX	XXXXX	3,000.00	XXX	XXXXX	XX.XX.XXXX	<input type="checkbox"/>	..	Waived
XXXXX	XXXXX	XXXXX	3,000.00	XXX	XXXXX	XX.XX.XXXX	<input type="checkbox"/>	..	Paid
XXXXX	XXXXX	XXXXX	3,000.00	XXX	XXXXX	XX.XX.XXXX	<input type="checkbox"/>	..	Paid

### Technical Rfx Response Activity Initiate Technical Rfx Response Opening

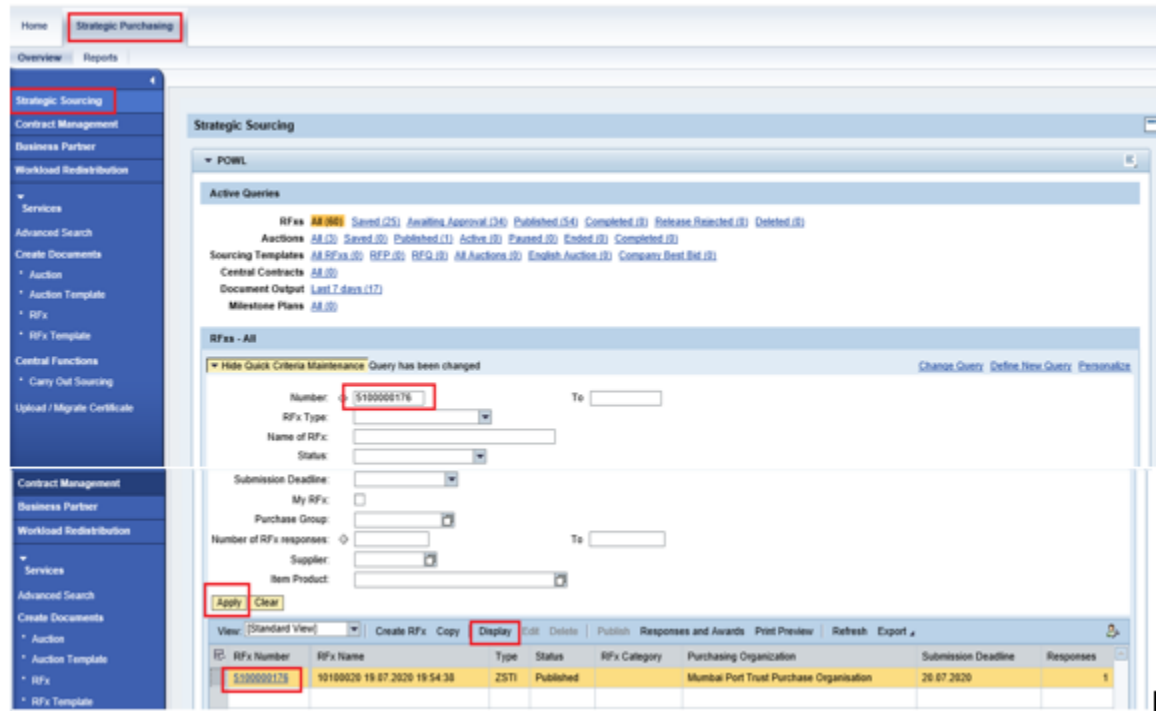
Buyer needs to login first to the EBS portal. Please refer to section number 1.1 for login to EBS portal & SSO to SRM portal & follow the steps.

Click on “Strategic Purchasing” tab and then click on “Strategic Sourcing” link. At the right side panel in the Search criteria screen provide the Rfx number and then click on “Apply” button.

This particular Rfx will be displayed, select the Rfx and click on “Display” button. Simultaneously you can also click on the Rfx number to open the Rfx.

Please see the screenshot below.

## SAP User Manual for Calibration/Statutory/Survey Maintenance



RFx will be visible in another window and it will be in display mode. Click on the “Initiate Technical RFx Response Opening” button. This button will be active once the Technical RFx Response Opening Date & time is reached.

# SAP User Manual for Calibration/Statutory/Survey Maintenance

**Display RFX :**

RFX Number: 510000185 | RFX Name: 10100020 22.07.2020 15:31:01 | Type: Adv/Opn Tender 1 Env | Status: Published | Created On: 22.07.2020 15:38:48 | Created By: ADITI SHENDYE | Time Zone: INDIA  
 Number of Suppliers: 3 | Number of Items: 1 | Version Number: 1 | Version Type: Active Version | External Version Number: 1

**Identification**  
 RFX Name: 10100020 22.07.2020 15:31:01  
 Port Tender No: MBPT/2020/072201  
 Tender Description: THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.  
 RFX Type: Adv/Opn Tender 1 Env  
 Publication Type: Public RFX

**Event Parameters**  
 Currency: INR  
 Target Value: 60,000.00 INR  
 Detailed Price Information: Simple Price  
 Follow-On Document: Purchase Order or Contract  
 Bidder Can Change RFX Responses:   
 Allow Multiple RFX Responses for Each Company:   
 Display Weighting to Bidders:   
 AMC Indicator:   
 QSBC:   
 Percentage Bidding:

**Organization**  
 Purchasing Organization: Mumbai Port Trust Purchase Organisation  
 Purchasing Group: Material Mgmt Purchase Group [Show Members](#)

**Dates**  
 RFX Start Date: 23.07.2020 09:30:00  
 RFX Submission Date: 23.07.2020 11:00:00  
 Price Rfx Opening Date: 23.07.2020 11:00:00  
 Technical RFX Response Opening Date: 23.07.2020 11:00:00  
 End of Binding Period:  
 Valid From / To: 23.07.2020 - 19.01.2021

**Tender Fee**  
 Required:   
 Tender Fee Percentage: 2  
 Tender Fee: 1,200.00 INR  
 Submission Deadline: 23.07.2020 10:20:00

**Security Deposit**  
 Security Deposit Required:   
 Security Deposit Percentage: 8

**Earnest Money Deposit**  
 Required:

A new window will get opened. Here the Buyer needs to provide the password to proceed further. Click on “Acknowledge” button. System will start the technical opening process.

**Simultaneous Logon**

User ID: 10100020

\* Password: ●●●●●●

**Process Details**

Process Start-End Time: 00:00:00 - 00:00:00

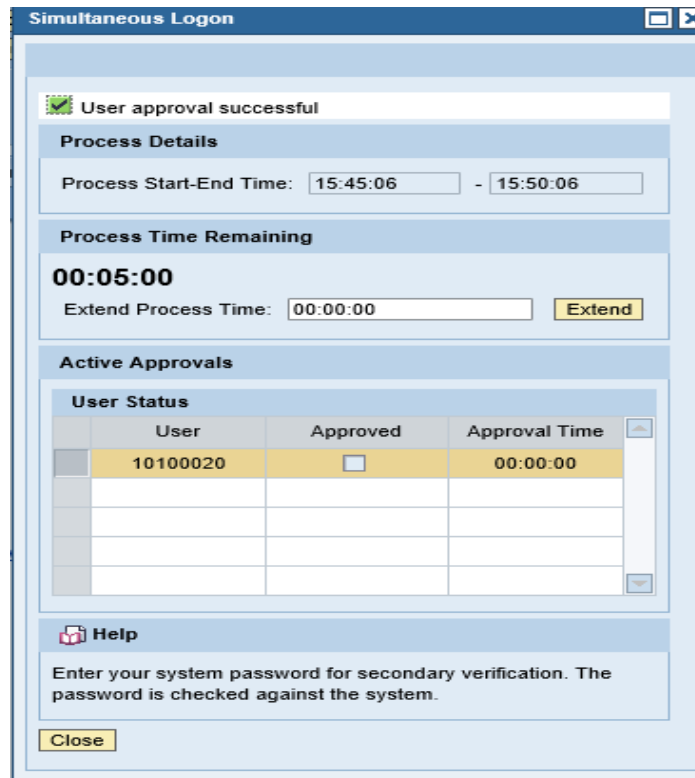
**Help**

Enter your system password for secondary verification. The password is checked against the system.

\* Tender Fee:

Below screen will be displayed. Click on “Close” button to close this window.

## SAP User Manual for Calibration/Statutory/Survey Maintenance



Since this is an Open tender single envelope tender, system will automatically perform the opening of the technical rfx response. Buyer needs to proceed to perform the TCR report related activities as explained in next section.

### Technical Comparative Statement

Now we need to perform the TCR activity as this is a common process to be performed for all tender types.

There is always a possibility that the tender committee members may be required to change due to non-availability or transfer etc. In such scenarios, Buyer can always modify the user's in the Permission Tab. New users can be added or for the existing user's the roles can be modified.

To access the TCR report, click on "**Response and Awards**" button as mentioned in the below screenshot.



# SAP User Manual for Calibration/Statutory/Survey Maintenance

**Display RFX :**

RFX Number 5100000185    RFX Name 10100020 22.07.2020 15:31:01    Type Adv/Opn Tender 1 Env    Status Published    Created On 22.07.2020 15:38:46    Created By ADITI SHENDYE    Time Zone INDIA  
 Number of Suppliers 3    Number of Items 1    Version Number 1    Version Type Active Version    External Version Number 1

**Identification**

RFX Name: 10100020 22.07.2020 15:31:01  
 Port Tender No: MBPT/2020/07/2201  
 Tender Description: THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.  
 RFX Type: Adv/Opn Tender 1 Env  
 Publication Type: Public RFX

**Event Parameters**

Currency: INR  
 Target Value: 60,000.00 INR  
 Detailed Price Information: Simple Price  
 Follow-On Document: Purchase Order or Contract  
 Bidder Can Change RFX Responses:   
 Allow Multiple RFX Responses for Each Company:   
 Display Weighting to Bidders:

**Organization**

Purchasing Organization: Mumbai Port Trust Purchase Organisation  
 Purchasing Group: Material Mgmt Purchase Group [Show Members](#)

**Dates**

RFX Start Date: 23.07.2020 09:30:00  
 \* RFX Submission Date: 23.07.2020 11:00:00  
 Price Rfx Opening Date: 23.07.2020 11:00:00

**Tender Fee**

Required:   
 Tender Fee Percentage: 2  
 \* Tender Fee: 1,200.00 INR  
 Submission Deadline: 23.07.2020 10:20:00

**Security Deposit**

\* Security Deposit Required:   
 \* Security Deposit Percentage: 8

A new window will get opened. Select the “Technical Response Activity” tab and click on the “TCR Report” button.

**Responses and Awards**

Remaining Time 0 Days 00:00:00    RFX Name 10100020 22.07.2020 15:31:01    Type Adv/Opn Tender 1 Env    Status Published    Number of Suppliers 3    RFX Number 5100000185

**Technical RFX Responses and Awards**

RFX Response	RFX Response Status	Company Name	Bidder Name	RFX Response Version	Last Changed
6100000185	Bid submitted	FELIX ENGG. CO.	FELIX ENGG. CO.	1	23.07.2020
6100000187	Bid submitted	M/S. A. A. TRADERS,	A. A. TRADERS,	1	23.07.2020
6100000188	Bid submitted	CONA INDUSTRIES	CONA INDUSTRIES	1	23.07.2020

A new window will be displayed. Here in this screen, the details provided by the Bidder’s against the question maintained by the Buyer will be displayed. Buyer needs to provide his findings under the “Buyer comments for 61xxxxxx” for all the line items.

Supporting documents uploaded by the Bidders will be visible under the “List of Attachments” section.

Confidential Document

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# SAP User Manual for Calibration/Statutory/Survey Maintenance

Technical Comparative Stat... x

RfX No: 5100000185

urch Org: Mumbai Port Trust Purchase Organisation

\*Please Maintain Comments against each RfX Response

**Technical Comparative Statement**

S.No.	Group	Question	40000442 & / 6100000185	Buyer Comments for 6100000185	40000444 & / 6100000187	Buyer Comments for 6100000187	40000899 & / 6100000188	Buyer Comments for 6100000188
1	Eligibility Criteria	DOU YOU HAVE PAN NO	YES	OK, accepted	YES	Ok, PAN verified	YES PAN NO IS AVAIABLE	ok
2	Eligibility Criteria	WHETHER DOCUMENTS FOR START UP...	YES	The document uploaded is ok	YES ATTACHED	The document uploaded is ok	YESS	The document uploaded is ok

**List Of Attachments**

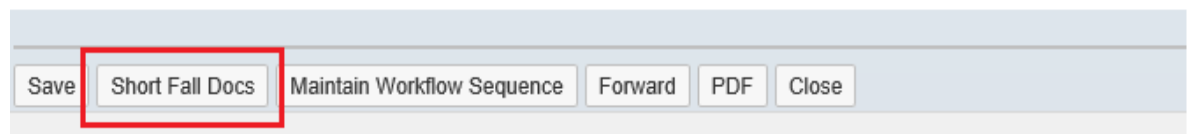
RfX No	RfX Response No	Vendor Name	Attachment
5100000185	6100000185		STARTUP DOCUMENT.DOCX
5100000185	6100000187		STARTUP DOCUMENT.DOCX
5100000185	6100000188		STARTUP DOCUMENT.DOCX

**Email Logs for Shortfall Docs**

RfX Response No	Vendor Name	Comments	Sender	Sent Date	Sent Time

Buyer's Comments

For any shortfall documents, Buyer needs to intimate the Bidder to submit the same. To perform this step, click on "Short Fall Docs" button as shown in screenshot below.



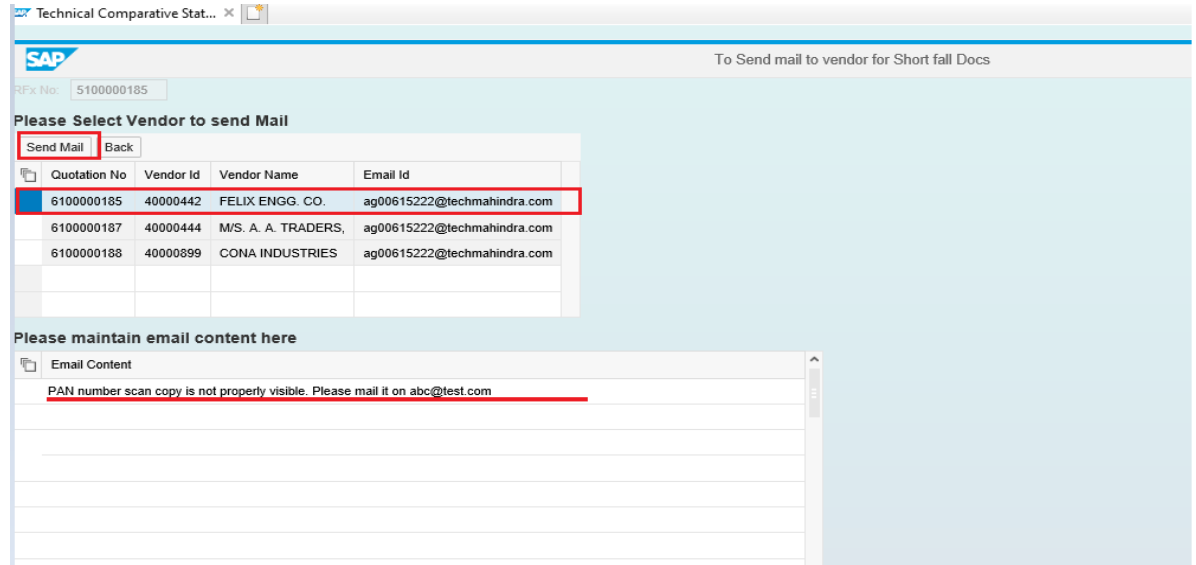
A new window will get displayed as shown below.

In this step, Buyer need to select the relevant RfX response number, write appropriate content under the "Email Content" option. Once done Buyer will click on "Send Mail" button. Mail will get triggered to the respective Bidder.

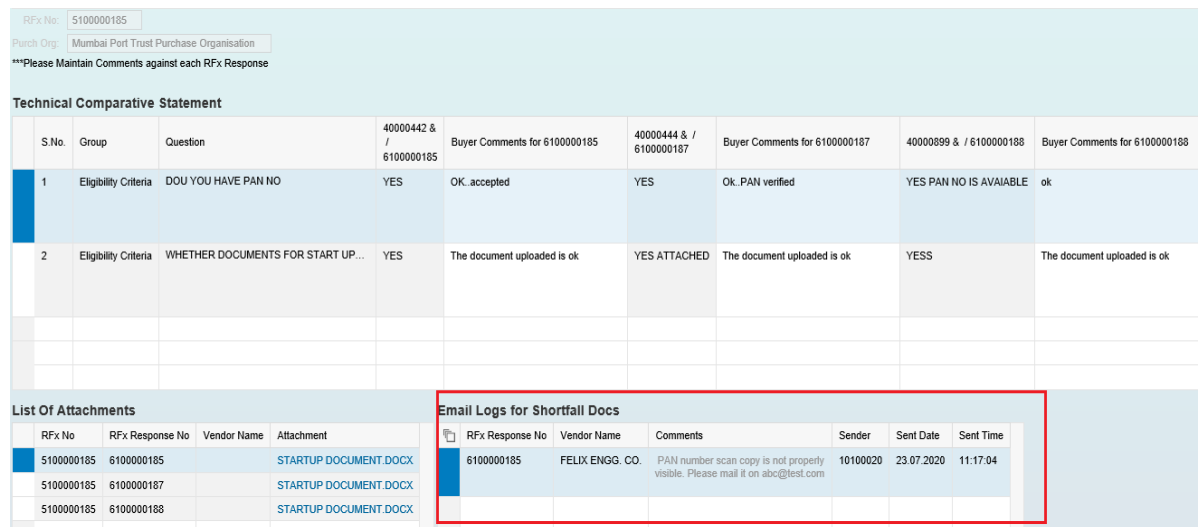
Bidder will send the required documents offline. Buyer can later on verify the documents and upload the same in C-folder of that particular RfX.



# SAP User Manual for Calibration/Statutory/Survey Maintenance



The email log details will also be available for all the short fall documents related communication as shown below.



Mail will get triggered and system will display the success message as shown in screenshot below.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

All  1

Mail send Successfully to Selected Vendors

---

**SAP** To Send mail to vendor for Short fall Docs

Once Buyer has performed his preliminary scrutiny and received all the shortfall documents, it is mandatory to maintain the overall comments & Save it by clicking on the “Save” button. Please see screenshot below.

Buyer's Comments

Buyer's Overall Comments: All the details verified and shortfall documents also received and verified from Felix Engg. Co. Forwarding to scrutiny and review committee members

Scrutiny's Team Comment

User ID	Full Name	Status	Comment's Date	Comment's Time	Comments
10100011	SIDDHASANJAY APHALE			00:00:00	
10100012	PERAMPATTANALIL GOPI			00:00:00	

Observation/Recommendation committee's Comments

User ID	Full Name	Status	Comment's Date	Comment's Time	Comments
10100013	ARVIND APANDKAR			00:00:00	
10100024	MRINALINI KELKAR			00:00:00	

Save Short Fall Docs Maintain Workflow Sequence Forward PDF Close

Buyer needs to forward the tender to the scrutiny and review committee team further. To do so Buyer first needs to click on “Maintain Workflow Sequence” button as shown below.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

Scrutiny's Team Comment						
User ID	Full Name	Status	Comment's Date	Comment's Time	Comments	
10100011	SIDDHASANJAY APHALE			00:00:00		
10100012	PERAMPATTANALIL GOPI			00:00:00		

Observation/Recommendation committee's Comments						
User ID	Full Name	Status	Comment's Date	Comment's Time	Comments	
10100013	ARVIND APANDKAR			00:00:00		
10100024	MRINALINI KELKAR			00:00:00		

Save Short Fall Docs **Maintain Workflow Sequence** Forward PDF Close

It has to be noted that, the user's having the Tech Scrutiny role (assigned in Permission tab) assigned will be displayed under the "Scrutiny's Team Comment" section.

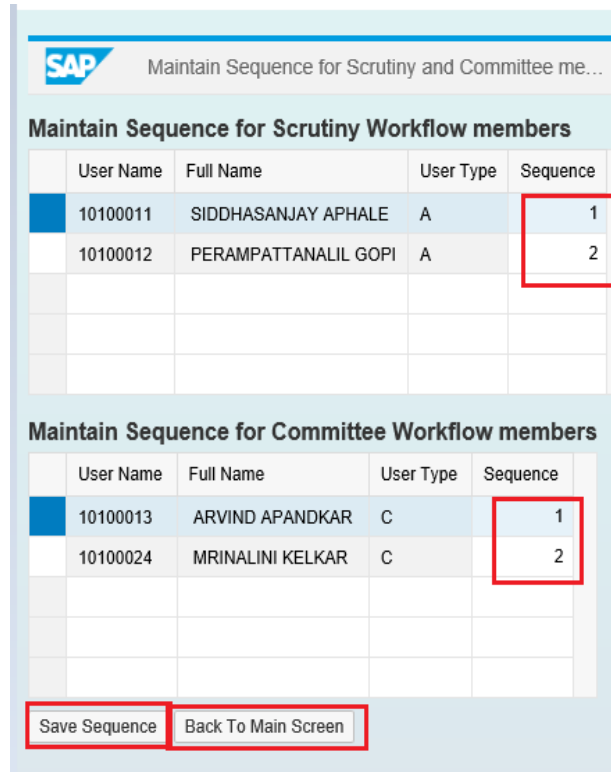
Likewise, user's having the Technical Evaluator role (assigned in the Permission tab) will be displayed under the "Observation/Recommendation committee' section.

If a new user/s are added or any modifications done in the role assignment the same details will get replicated in the TCR screen.

The list of user's displayed here are not in proper sequence since system picks the user's from the permission tab. For this reason, Buyer needs to maintain the sequence for how the workflow should get triggered. Here Buyer can decide the sequence in which the TCR report should flow.

A new window will be opened consisting the list of user's based on their role assignment will be displayed as shown in screenshot below.

## SAP User Manual for Calibration/Statutory/Survey Maintenance



User Name	Full Name	User Type	Sequence
10100011	SIDDHASANJAY APHALE	A	1
10100012	PERAMPATTANALIL GOPI	A	2

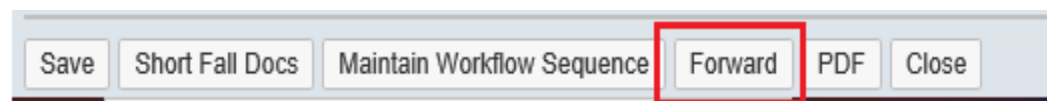
  

User Name	Full Name	User Type	Sequence
10100013	ARVIND APANDKAR	C	1
10100024	MRINALINI KELKAR	C	2

Save Sequence    Back To Main Screen

Provide the sequences and then click on **“Save Sequence”** button. Then click on **“Back to Main Screen”** button. The window will get closed and user will be re-directed to the main TCR report screen.

Now Buyer needs to click on **“Forward”** button as shown below.

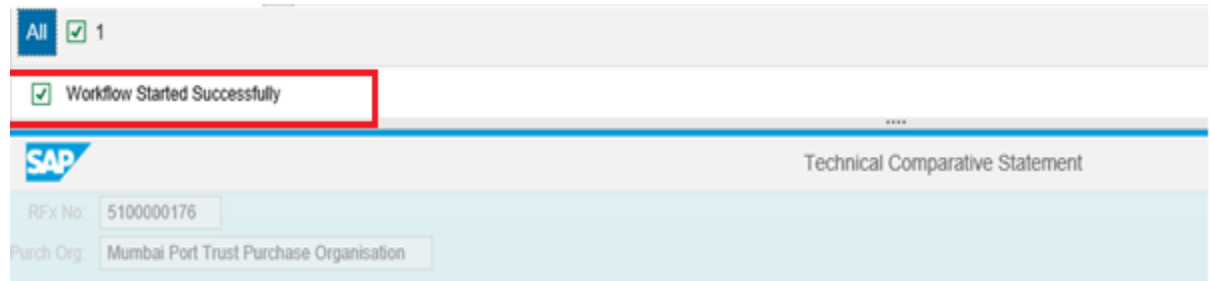


Save    Short Fall Docs    Maintain Workflow Sequence    **Forward**    PDF    Close

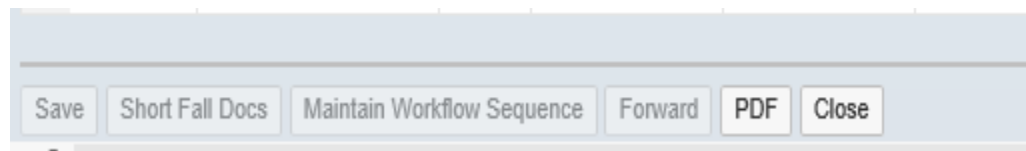
System will display message as shown in below screenshot.



## SAP User Manual for Calibration/Statutory/Survey Maintenance



Once the Buyer has clicked on the “Forward” button the workflow will get triggered as shown in screenshot above. All the buttons below will get deactivated. Only PDF & Close buttons will be active.



Email notification will be triggered to the respective users to approve the TCR report.

### Approving TCR

Follow the process of logging to EBS portal as detailed in section 1.1

Once the user is redirected to the SRM portal through SSO, below screen will be displayed. Here the TCR report approver needs to navigate to “Home” tab and then click on “Tasks” tab. Under “Tasks” system will display

Click on the work item displayed in the tasks list as shown below.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

The screenshot shows the 'E-PROCUREMENT PORTAL' interface. The user is logged in as SIDDHASANJAY APHALE. The 'Tasks (4/4)' tab is active, showing a list of tasks. The first task is highlighted in yellow.

Subject	Sent Date	Due Date	Status
Please Evaluate TECHNICAL COMPARATIVE REPORT for RFx 5100000185	Today		New
Please Evaluate TECHNICAL COMPARATIVE REPORT for RFx 5100000125	Jun 26, 2020		New
Please Evaluate TECHNICAL COMPARATIVE REPORT for RFx 5100000124	Jun 26, 2020		New
Please Evaluate TECHNICAL COMPARATIVE REPORT for RFx 5100000115	Jun 24, 2020		New

A new window will get displayed as shown below.

Scrutiny member can input his comments and either click on “**Submit**” button to provide his acceptance.

If there are some clarifications required from Buyer, then the scrutiny member needs to click on “**Return**” button. The workflow will be re-triggered back to Buyer and Buyer is required to provide satisfactory justification and then again trigger the workflow.

Scrutiny team also can view the comments provided by the previous members by clicking on the “**TCR pdf**” button. System will display the report in pdf format.

Click on the “**Close**” button to close this screen.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Task - IPA SRM Portal - Internet Explorer - [InPrivate]  
InPrivate https://ipasdbqieq.portebs.com:50001/irj/portal?NavigationTarget=R

Please evaluate the below RFx

RFx No: 5100000185

Comments from 10100011 scrutiny team member This is a free text box

Submit Return TCR PDF Close

Once the comments are submitted or the work-item is returned message “Data updated successfully” will be displayed. Please see the screenshot below.

Data Updated Successfully

Please evaluate the below RFx

RFx No: 5100000185

Comments from 10100011 scrutiny team member This is a free text box

Submit Return TCR PDF Close

Based on the number of user’s selected for performing scrutiny activities the workflow will get triggered to the subsequent user’s.

Similar steps need to be repeated by the scrutiny members to login to EBS portal and submit their recommendation’s.

Once all the scrutiny members have completed their activities, the workflow will get triggered to the Review Committee members based on the sequence maintained by the Buyer.

Review committee members need to follow the steps as mentioned above from point#6.3.1 to point#6.3.5

Once all the activities are performed and all the details captured, below screenshot will be displayed.



# SAP User Manual for Calibration/Statutory/Survey Maintenance

Buyer's Comments

Buyer's Overall Comments: All the details verified and shortfall documents also received and verified from Felix Engg. Co. Forwarding to scrutiny and review committee members

Scrutiny's Team Comment

User ID	Full Name	Status	Comment's Date	Comment's Time	Comments
10100012	PERAMPATTANALIL GOPI	APPROVED	23.07.2020	11:39:07	Please proceed ahead. Recommended by scrutiny team member 10100012
10100011	SIDDHASANJAY APHALE	APPROVED	23.07.2020	11:36:52	Comments from 10100011 scrutiny team member This is a free text box

Observation/Recommendation committee's Comments

User ID	Full Name	Status	Comment's Date	Comment's Time	Comments
10100024	MRINALINI KELKAR	APPROVED	23.07.2020	11:41:59	Reviewed by auditor and acknowledge...
10100013	ARVIND APANDKAR	APPROVED	23.07.2020	11:40:31	Recommended by review committee team member 10100013

Save Short Fall Docs Maintain Workflow Sequence Forward PDF Close

“Accept/Reject” buttons will get activated once the technical comparative statement/report activities are completed.

Click on “Accept” button as shown below to accept the technically qualify the bids.

**Responses and Awards**

Print Preview Close Export Questions and Answers ( 0 ) System Information Create Memory Snapshot

Remaining Time 0 Days 00:00:00 RFX Name 10100020 22.07.2020 15:31:01 Type Adv/Opn Tender 1 Env Status Published Number of Suppliers 3 RFX Num

Response Activity Surrogate Bidding **Technical Response Activity**

**Technical RFX Responses and Awards**

TCR Report **Accept** Reject Refresh

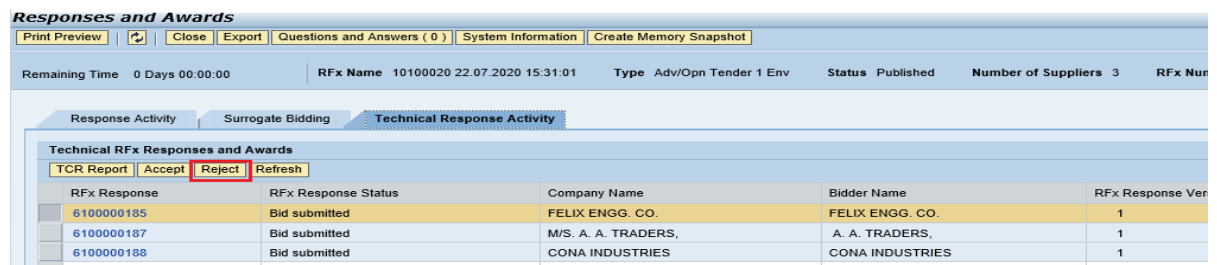
RFX Response	RFX Response Status	Company Name	Bidder Name	RFX Response Vers
6100000185	Bid submitted	FELIX ENGG. CO.	FELIX ENGG. CO.	1
6100000187	Bid submitted	M/S. A. A. TRADERS,	A. A. TRADERS,	1
6100000188	Bid submitted	CONA INDUSTRIES	CONA INDUSTRIES	1



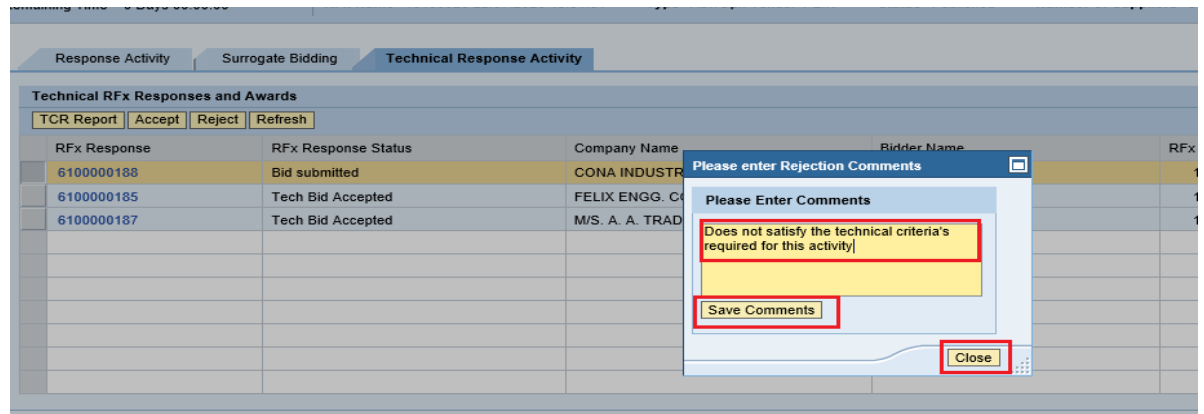
## SAP User Manual for Calibration/Statutory/Survey Maintenance

Initial status of RfX response will always be “Bid Submitted”. Once the decision is performed. The RfX response status will get changed. The same is explained in the subsequent steps below.

Click on “Reject” button to technically disqualify the Bidder response.



New window will be displayed wherein Buyer needs to input the reason for technically rejecting the response. Input the relevant comments. Click on “Save Comments” button and the click on “Close” button.



Once the response is technically accepted or technically rejected, status will get changed from Bid Submitted to Tech Bid Accepted or Tech Bid Rejected. Please see the screenshot below.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

The screenshot shows the 'Responses and Awards' interface in SAP. It includes a header with navigation options like 'Print Preview', 'Close', 'Export', 'Questions and Answers (0)', 'System Information', and 'Create Memory Snapshot'. Below this, there are fields for 'Remaining Time' (0 Days 00:00:00), 'RFx Name' (10100020 22.07.2020 15:31:01), 'Type' (Adv/Opn Tender 1 Env), 'Status' (Published), 'Number of Suppliers' (3), and 'RFx Number' (5100000185). The main content area is titled 'Technical Response Activity' and contains a table with the following data:

RFx Response	RFx Response Status	Company Name	Bidder Name	RFx Response Version	Last Changed
6100000185	Tech Bld Accepted	FELIX ENGG. CO.	FELIX ENGG. CO.	1	23.07.2020
6100000187	Tech Bld Accepted	M/S. A. A. TRADERS,	A. A. TRADERS,	1	23.07.2020
6100000188	Tech Bld Rejected	CONA INDUSTRIES	CONA INDUSTRIES	1	23.07.2020

Once all the above technical activities are completed, system will automatically enable a button for initiating the price opening activity. The same is explained in the subsequent section.

### Price RFx Response Activity Initiate Price RFx Response Opening

Buyer needs to login first to the EBS portal. Please refer to section number 1.1 for login to EBS portal & SSO to SRM portal & follow the steps.

Click on **“Strategic Purchasing”** tab and then click on **“Strategic Sourcing”** link. At the right side panel in the Search criteria screen provide the RFx number and then click on **“Apply”** button.

This particular RFx will be displayed, select the RFx and click on **“Display”** button. Simultaneously you can also click on the RFx number to open the RFx.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

The screenshot shows the SAP E-Procurement Portal interface. The top navigation bar includes 'Home' and 'Strategic Purchasing'. The left sidebar contains various menu items, with 'Strategic Sourcing' selected. The main content area displays the 'Strategic Sourcing' dashboard, which includes a 'POWL' (Purchase Order Work List) section. Under 'Active Queries', there are counts for various query types. The 'RFxs - All' section shows a search filter with the 'Number' field set to '5100000185'. Below the search filter, there are several input fields for filtering RFx records, including 'RFx Type', 'Name of RFx', 'Status', 'Processed Since', 'Purchasing Organization', 'Product Category', 'Submission Deadline', 'My RFx', 'Purchase Group', 'Number of RFx responses', 'Supplier', and 'Item Product'. An 'Apply' button is visible below these filters. At the bottom of the page, a table displays the results of the search, with one row highlighted in yellow.

ID	RFx Number	RFx Name	Type	Status	RFx Category	Purchasing Organization	Submission Deadline	Responses
1	5100000185	10100020 22.07.2020 15.31.01	ZAT1	Published		Mumbai Port Trust Purchase Organisation	23.07.2020	3

RFx will be visible in another window and it will be in display mode. Click on the “Initiate Price RFx Response Opening” button. This button will be active, once the Price RFx Response Opening Date & time is reached and the technical response activities are completed.

A new window will get popped-up. Provide the password and click on “**Acknowledge**” button.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

**Display RFX :**

Buttons: Edit, Initiate Price RFX Response Opening, Close, Technical RFX, Permissions, Copy, Check, Discharge RFX, Responses and Awards, Create Follow-on RFX, Export, Print Preview

Questions and Answers (0) | Maintain Rfx Parameter | Change Price Open Date | System Information | Create Memory Snapshot | Related Links

RFX Number: 5100000185 | RFX Name: 10100020 22.07.2020 15:31:01 | Type: Adv/Opn Tender 1 Env | Status: Published | Created On: 22.07.2020 15:38:46 | Created By: ADITI SHENDYE

Number of Suppliers: 3 | Number of Items: 1 | Version Number: 1 | Version Type: Active Version | External Version Number: 1

**RFX Information** | Bidders | Items | Notes and Attachments | Weights and Balances

RFX Parameters | Questions | Notes and Attachments

**Identification**

RFX Name: 10100020 22.07.2020 15:31:01  
Port Tender No: MBPT/2020/07/2201  
Tender Description: THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.  
RFX Type: Adv/Opn Tender 1 Env  
Publication Type: Public RFX

**Organization**

Purchasing Organization: Mumbai Port Trust Purchase Organisation  
Purchasing Group: Material Mgmt Purchase Group

**Dates**

RFX Start Date: 23.07.2020 09:30:00  
RFX Submission Date: 23.07.2020 11:00:00  
Price Rfx Opening Date: 23.07.2020 11:00:00  
End of Binding Period: 23.07.2020 11:00:00  
Valid From / To: 23.07.2020 - 19.01.2021

**Simultaneous Logon**

User ID: 10100020  
\* Password: [Masked]  
Buttons: Acknowledge, Cancel

**Process Details**

Process Start-End Time: 00:00:00 - 00:00:00

**Help**

Enter your system password for secondary verification. The password is checked against the system.  
Buttons: Close

Below screen will get displayed and it will display the list of user's responsible for Opening the price RFX response. Click on "Close" button to close this window.

**Display RFX :**

Buttons: Edit, Initiate Price RFX Response Opening, Close, Technical RFX, Permissions, Copy, Check, Discharge RFX, Responses and Awards, Create Follow-on RFX, Export, Print Preview, Verify Signature

Questions and Answers (0) | Maintain Rfx Parameter | Change Price Open Date | System Information | Create Memory Snapshot | Related Links

RFX Number: 5100000185 | RFX Name: 10100020 22.07.2020 15:31:01 | Type: Adv/Opn Tender 1 Env | Status: Published | Created On: 22.07.2020 15:38:46 | Created By: ADITI SHENDYE

Number of Suppliers: 3 | Number of Items: 1 | Version Number: 1 | Version Type: Active Version | External Version Number: 1

**RFX Information** | Bidders | Items | Notes and Attachments | Weights and Balances

RFX Parameters | Questions | Notes and Attachments

**Identification**

RFX Name: 10100020 22.07.2020 15:31:01  
Port Tender No: MBPT/2020/07/2201  
Tender Description: THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.  
RFX Type: Adv/Opn Tender 1 Env  
Publication Type: Public RFX

**Organization**

Purchasing Organization: Mumbai Port Trust Purchase Organisation  
Purchasing Group: Material Mgmt Purchase Group

**Dates**

RFX Start Date: 23.07.2020 09:30:00  
RFX Submission Date: 23.07.2020 11:00:00  
Price Rfx Opening Date: 23.07.2020 11:00:00  
End of Binding Period: 23.07.2020 11:00:00  
Valid From / To: 23.07.2020 - 19.01.2021

**Simultaneous Logon**

User approval successful

**Process Details**

Process Start-End Time: 15:45:43 - 15:50:43

**Process Time Remaining**

00:04:59  
Extend Process Time: 00:00:00 [Extend]

**Active Approvals**

User	Approved	Approval Time
10100024	<input type="checkbox"/>	00:00:00
10100016	<input type="checkbox"/>	00:00:00

**Help**

Enter your system password for secondary verification. The password is checked against the system.  
Buttons: Close

Email notification will be triggered to the user's for performing the price RFX response activity.

Confidential Document

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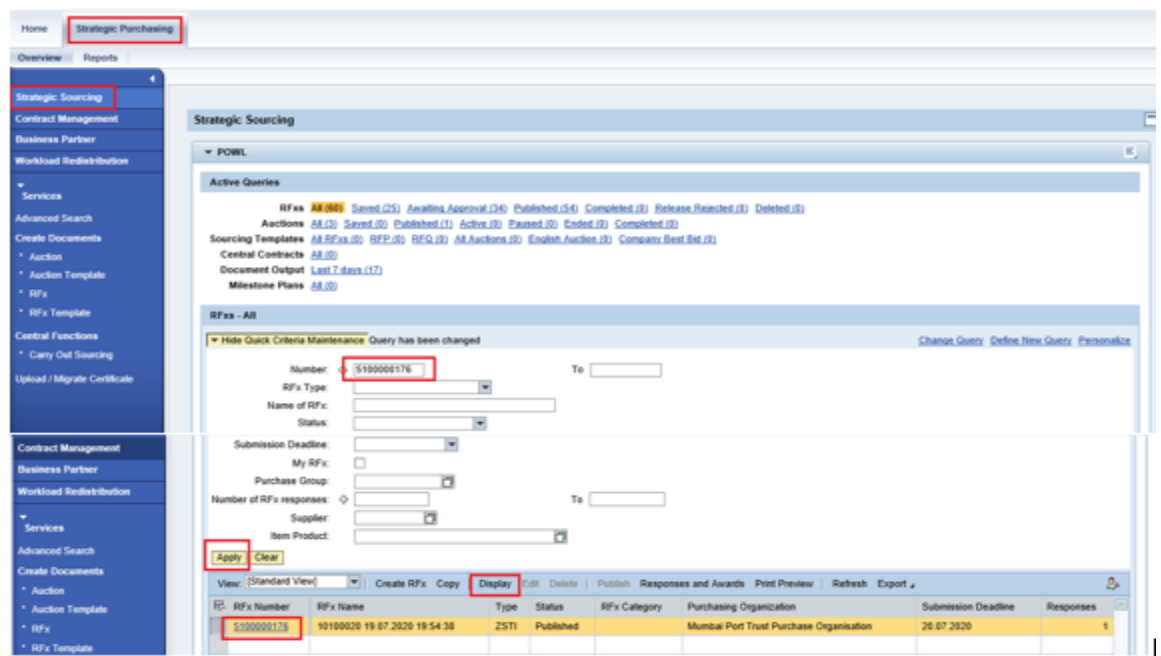
## SAP User Manual for Calibration/Statutory/Survey Maintenance

User need to follow the steps mentioned in Section#1.1 to login to EBS portal & SSO to SRM portal.

Click on “Strategic Purchasing” tab and then click on “Strategic Sourcing” link. At the right side panel in the Search criteria screen provide the RfX number and then click on “Apply” button.

This particular RfX will be displayed, select the RfX and click on “Display” button. Simultaneously you can also click on the RfX number to open the RfX.

screenshot below.

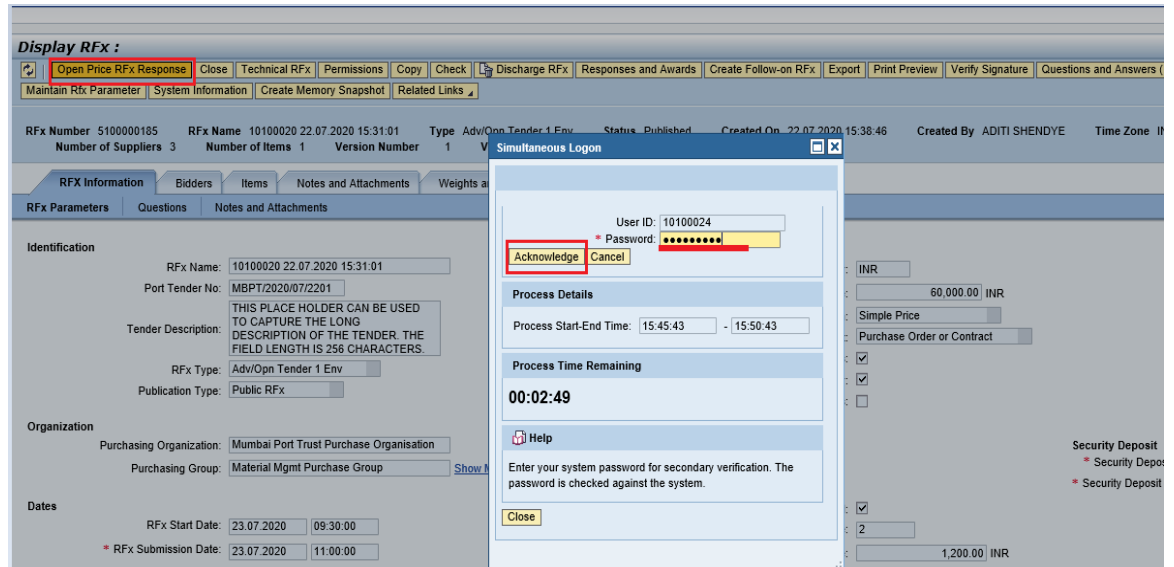


RfX will be visible in another window and it will be in display mode.

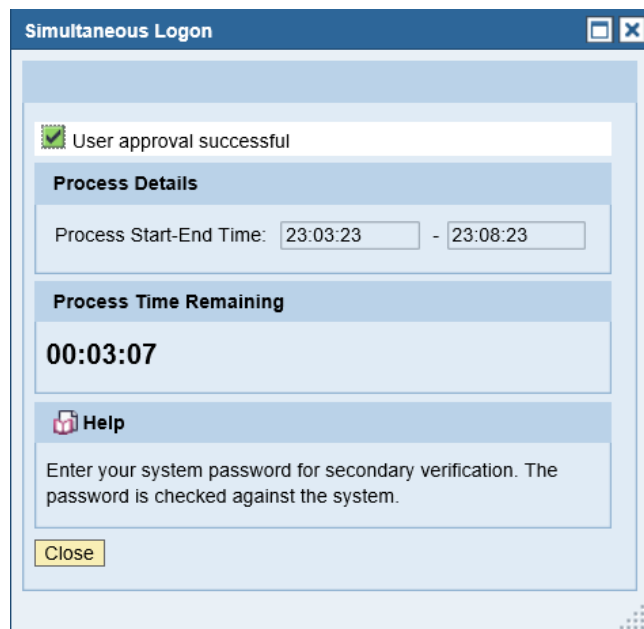
Click on the “Open Price RfX Response Opening” button. This button will be active, once Buyer has initiated the price opening process.

A new window will get popped-up. Provide the password and click on “Acknowledge” button.

## SAP User Manual for Calibration/Statutory/Survey Maintenance



Provide the password and click on “Acknowledge” button. Below message will be displayed and then click on “Close” button to close this window.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

Similarly, other users can perform their activity of acknowledging the price RfX response opening. The above process is through Simultaneous logon i.e. multiple users can login and perform the activity simultaneously.

There is a possibility of extending the time for opening RFX price response. In such cases, Buyer can click again on the “Initiate Price RfX Response Opening” button and extend the time as shown in screenshot below.

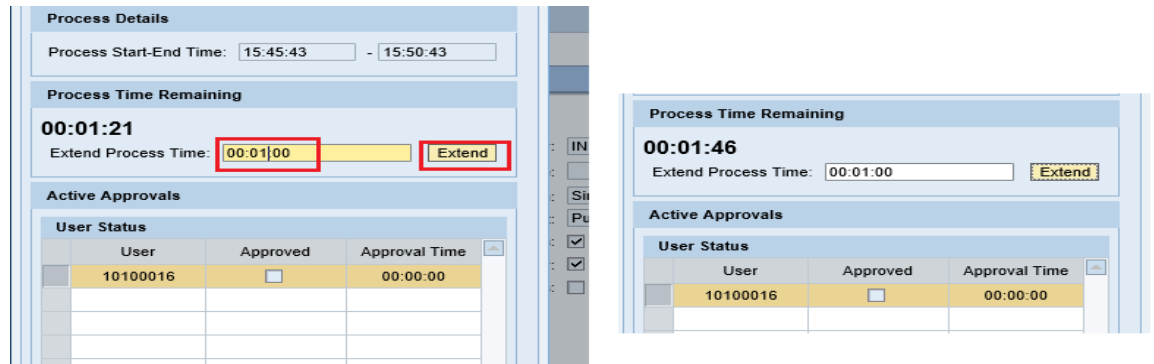
A new window will get opened. Provide the time either in hours / minutes or seconds to extend the process.

Click on “Extend” button. System will extend the timings accordingly.

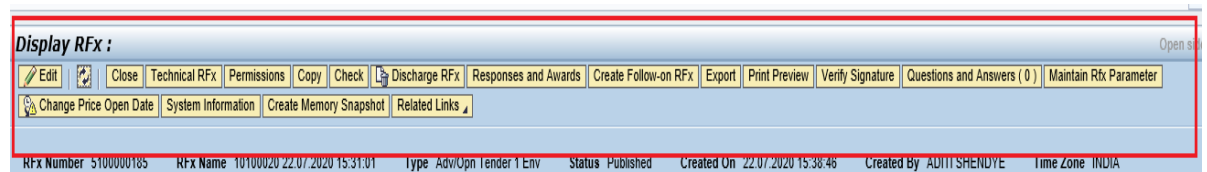
The screenshot displays the SAP RFX interface. The main window is titled "Display RFX :". At the top, there is a toolbar with buttons: "Edit", "Initiate Price RfX Response Opening" (highlighted with a red box), "Close", "Technical RFX", and "Permission". Below the toolbar, there are tabs for "Questions and Answers ( 0 )", "Maintain Rfx Parameter", and "Change Price Open Date". The main content area shows RFX details: RFX Number 510000185, RFX Name 10100020 22.07.2020 15:31:01, Type Adv/C, Number of Suppliers 3, Number of Items 1, Version Number 1. There are tabs for "RFX Information", "Bidders", "Items", "Notes and Attachments", and "Weights a". Below these are sub-tabs for "RFX Parameters", "Questions", and "Notes and Attachments". The "RFX Parameters" sub-tab is active, showing fields for Identification (RFX Name, Port Tender No, Tender Description, RFX Type, Publication Type), Organization (Purchasing Organization, Purchasing Group), and Dates (RFX Start Date, RFX Submission Date, Price Rfx Opening Date, Technical RFX Response Opening Date). A secondary window titled "Simultaneous Logon" is open on the right. It shows "Process Details" with "Process Start-End Time: 15:45:43 - 15:50:43". Under "Process Time Remaining", it shows "00:01:21" and "Extend Process Time: 00:01|00" (the "00:01|00" field is highlighted with a red box). An "Extend" button is also highlighted with a red box. Below this is a table for "Active Approvals" with columns "User", "Approved", and "Approval Time". The table has one row with User "10100016", Approved checkbox, and Approval Time "00:00:00". At the bottom of the "Simultaneous Logon" window, there is a "Help" section with a "Close" button.

In the given example the time is extended by 1 minutes. System has calculated the revised time as shown in screenshot below.

## SAP User Manual for Calibration/Statutory/Survey Maintenance



The button “Initiate Price Rfx Response Opening” will get disappeared automatically once all the members has acknowledged for opening the price in system as seen in screenshot below.



### Price Comparative Statement

Now we need to perform the PCR activity as this is a common process to be performed for all tender types.

There is always as possibility that the tender committee members may be required to change due to non-availability or transfer etc. In such scenarios, Buyer can always modify the user’s in the Permission Tab. New users can be added or for the existing user’s the roles can be modified.

To access the PCR report, click on “**Response and Awards**” button as mentioned in the below screenshot.



# SAP User Manual for Calibration/Statutory/Survey Maintenance

**Display RFX :**

RFX Number 5100000185    RFX Name 10100020 22.07.2020 15:31:01    Type Adv/Opn Tender 1 Env    Status Published    Created On 22.07.2020 15:38:46    Created By ADITI SHENDYE    Time Zone INDIA  
 Number of Suppliers 3    Number of Items 1    Version Number 1    Version Type Active Version    External Version Number 1

**Identification**  
 RFX Name: 10100020 22.07.2020 15:31:01  
 Port Tender No: MBPT/2020/07/2201  
 Tender Description: THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.  
 RFX Type: Adv/Opn Tender 1 Env  
 Publication Type: Public RFX  
**Organization**  
 Purchasing Organization: Mumbai Port Trust Purchase Organisation  
 Purchasing Group: Material Mgmt Purchase Group [Show Members](#)  
**Dates**  
 RFX Start Date: 23.07.2020 09:30:00  
 \* RFX Submission Date: 23.07.2020 11:00:00

**Event Parameters**  
 Currency: INR  
 Target Value: 60,000.00 INR  
 Detailed Price Information: Simple Price  
 Follow-On Document: Purchase Order or Contract  
 Bidder Can Change RFX Responses:   
 Allow Multiple RFX Responses for Each Company:   
 Display Weighting to Bidders:   
 Security Deposit  
 \* Security Deposit Required:   
 \* Security Deposit Percentage: 8

Tender Fee  
 Required:   
 Tender Fee Percentage: 2  
 \* Tender Fee: 1,200.00 INR

A new window will get opened. Select the “Response Comparison” tab and click on the “PCR Report” button. Please see screenshot below. The list will consists of only technically qualified bidder responses.

**Responses and Awards**

Remaining Time 0 Days 00:00:00    RFX Name 10100020 22.07.2020 15:31:01    Type Adv/Opn Tender 1 Env    Status Published    Number of Suppliers 3    RFX Number 5100000185

Response Number	Response Version	Company Name	Bidder Name
6100000185	1	FELIX ENGG. CO.	FELIX ENGG. CO.
6100000187	1	M/S. A. A. TRADERS,	A. A. TRADERS,

A new window will be displayed as shown below. Buyer needs to maintain his comments in the “Overall Comments” column and then click on “Save” button.



# SAP User Manual for Calibration/Statutory/Survey Maintenance

Purch Org: Mumbai Port Trust Purchase Organisation

### Price Comparative Statement

S.No.	Description of the work	Unit	Qty	Trust Estimate Rate/Unit	Trust Estimate Amount in Rs	ALR (Abnormally Low Rate above -25%)	AHR (Abnormally High Rate above +25%)	FELDX ENGG. CO. Rate/Unit	FELDX ENGG. CO. Amount in Rs	M/S. A. A. TRADERS, Rate/Unit	M/S. A. A. TRADERS, Amount in Rs
1	Cal/Stat/Survey Maint by External Vendor	AU	1.000	0.00	0.00			0.00	0.00	0.00	0.00
2	Two Coats - Oil Bound Distemper	M2	3.000	20000.00	60000.00			19000.00	57000.00	19500.00	58500.00
	Differ from Estimate Cost(in %)								5.00-		2.50-
	BASIC COST										
	TOTAL								57000.00		58500.00
	ORDER OF MERIT								Rank 1		Rank 2

Buyer's Comments

Buyer's Overall Comments: Forwarding to Price Scrutiny and Review committee members

### Scrutiny Team Comments / Remarks

User ID	Full Name	Status	Comment's Date	Comment's Time	Comments
10100019	LATA DATE			00:00:00	

### Committee Comments / Remarks

User ID	Full Name	Status	Comment's Date	Comment's Time	Comments
10100024	MRINALINI KELKAR			00:00:00	
10100017	MUKESH NAWANI			00:00:00	

Save Maintain Workflow Sequence Forward PDF Close

The price comparative report also contains the list of user's responsible for performing the Scrutiny and review committee activities.

These users are determined based on those maintained in Permission tab.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

**Scrutiny Team Comments / Remarks**

User ID	Full Name	Status	Comment's Date	Comment's Time	Comments
10100019	LATA DATE			00:00:00	

**Committee Comments / Remarks**

User ID	Full Name	Status	Comment's Date	Comment's Time	Comments
10100024	MRINALINI KELKAR			00:00:00	
10100017	MUKESH NAWANI			00:00:00	

Save Maintain Workflow Sequence Forward PDF Close

Once the overall comments are saved, Buyer needs to click on “Maintain Workflow Sequence” button.

**Scrutiny Team Comments / Remarks**

User ID	Full Name	Status	Comment's Date	Comment's Time	Comments
10100019	LATA DATE			00:00:00	

**Committee Comments / Remarks**

User ID	Full Name	Status	Comment's Date	Comment's Time	Comments
10100024	MRINALINI KELKAR			00:00:00	
10100017	MUKESH NAWANI			00:00:00	

Save Maintain Workflow Sequence Forward PDF Close

A new window will get opened. Provide the sequences and then click on “Save Sequence” button. Then click on “Back to Main Screen” button. The window will get closed and user will be re-directed to the main PCR report screen.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

All  1

Data Updated Successfully

SAP Maintain Sequence for Scrutiny and committee Member's

### Maintain Sequence for Scrutiny Workflow Members

User Name	Full Name	User Type	Sequence
10100019	LATA DATE	A	1

User Name	Full Name	User Type	Sequence
10100024	MRINALINI KELKAR	C	2
10100017	MUKESH NAWANI	C	1

Save Sequence Back To Main Screen

Now Buyer needs to click on “Forward” button as shown below to trigger the workflow.

Save Maintain Workflow Sequence Forward PDF Close

System will display message as shown in below screenshot.

PCR for ALR and AHR

All  1

Workflow Started Successfully

SAP Price Comparative Statement

Rfx No: 5100000185

Purch Org: Mumbai Port Trust Purchase Organisation



## SAP User Manual for Calibration/Statutory/Survey Maintenance

### Approving PCR

Follow the process of logging to EBS portal as detailed in section 1.1

Once the user is redirected to the SRM portal through SSO, below screen will be displayed. Here the PCR report approver needs to navigate to “Home” tab and then click on “Tasks” tab. Under “Tasks” system will display

Click on the work item displayed in the tasks list as shown below.

The screenshot shows the E-Procurement Portal interface. The top navigation bar includes 'Home' (highlighted with a red box) and 'Strategic Purchasing'. Below this, there are tabs for 'Alerts', 'Tasks (3 / 3)', and 'Notifications'. A table displays the following tasks:

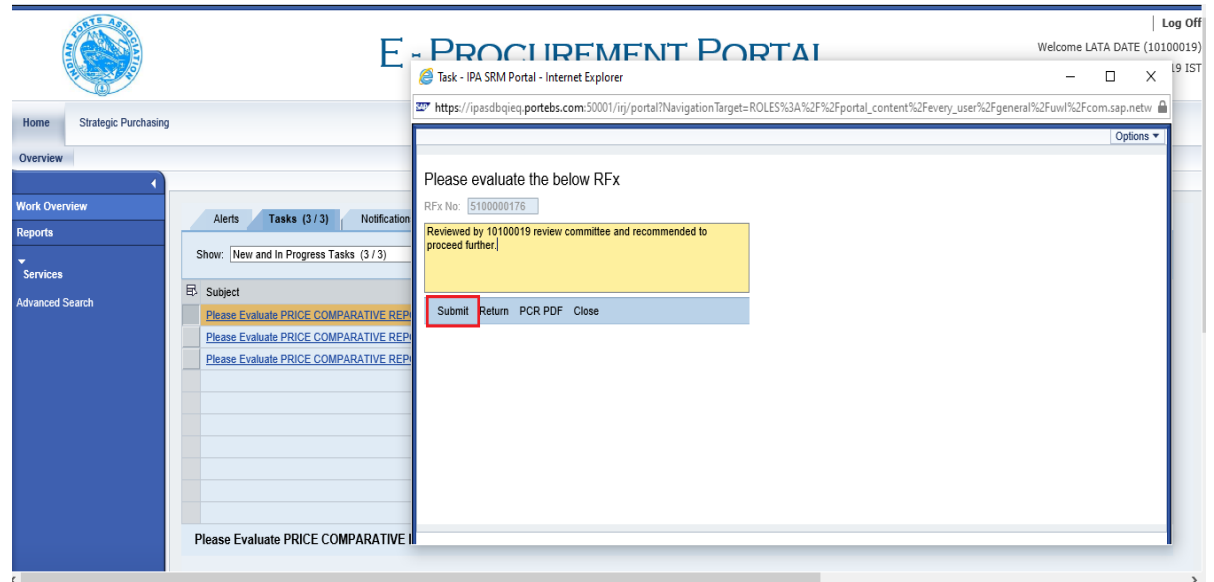
Subject	Sent Date	Due Date	Status
Please Evaluate PRICE COMPARATIVE REPORT for RFx 5100000176	Jul 20, 2020		New
Please Evaluate PRICE COMPARATIVE REPORT for RFx 5100000116	Jun 24, 2020		New
Please Evaluate PRICE COMPARATIVE REPORT for RFx 5100000115	Jun 24, 2020		New

A new window will get displayed as shown below.

Scrutiny member can input his comments and either click on “Submit” button to provide his acceptance.



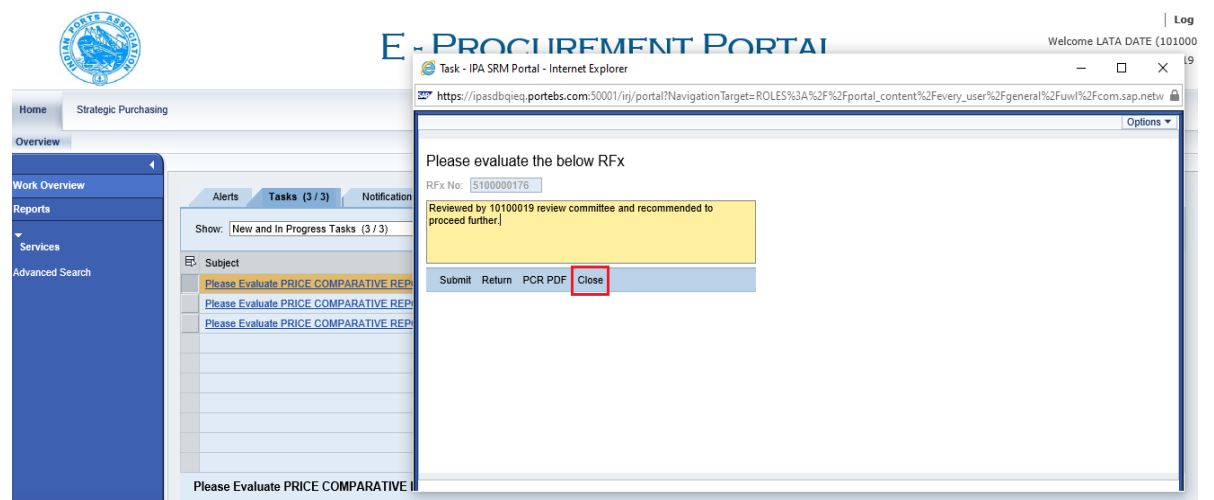
## SAP User Manual for Calibration/Statutory/Survey Maintenance



If there are some clarifications required from Buyer, then the scrutiny member needs to click on “Return” button. The workflow will be re-triggered back to Buyer and Buyer is required to provide satisfactory justification and then again trigger the workflow.

Scrutiny team also can view the comments provided by the previous members by clicking on the “PCR pdf” button. System will display the report in pdf format.

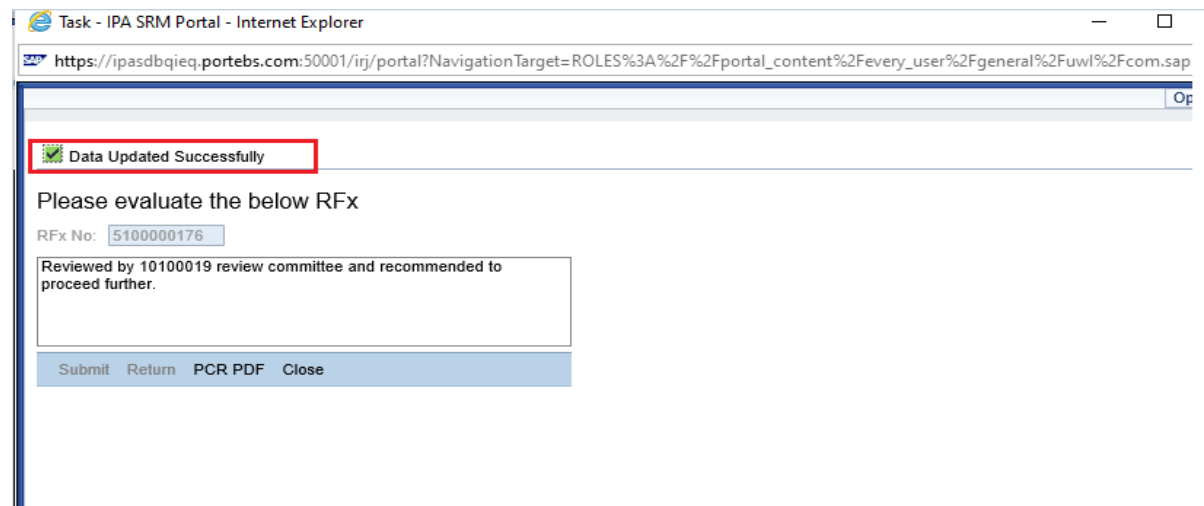
Click on the “Close” button to close this screen.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

Once the comments are submitted or the work-item is returned message “Data updated successfully” will be displayed. Please see the screenshot below.



Based on the number of user’s selected for performing review committee activities the workflow will get triggered to the subsequent user’s.

Similar steps need to be repeated by the other review committee members to login to EBS portal and submit their recommendation’s.

Once all the review committee members have completed their activities, the PCR process will be completed.

Based on the comments received from the review committee, Buyer i.e. the tender creator has to perform the further activities of initiating the awarding for the L1 bidder.

Initiation for awarding is explained in the next section.



# SAP User Manual for Calibration/Statutory/Survey Maintenance

SAP Price Comparative Statement

RFx No: 510000176  
Purchase Org: Mumbai Port Trust Purchase Organisation

**Price Comparative Statement**

S.No	Description of the work	Unit	Qty	Trust Estimate Rate/Unit	Trust Estimate Amount in Rs	FELIX ENGG. CO. Rate/Unit	FELIX ENGG. CO. Amount in Rs
1	Preventive Maint by External Vendor	AU	1.000	0.00	0.00	0.00	0.00
2	Two Coats - Oil Bound Distemper	M2	10.000	16000.00	160000.00	1000.00	10000.00
	Ranking For Item						Rank 1
	Differ from Estimate Cost(in %)						93.75-
	BASIC COST						
	TOTAL						10000.00
	ORDER OF MERIT						Rank 1

**Buyer's Comments**

Forwarding to Price scrutiny and review committee. asdfasf

**Scrutiny Team Comments / Remarks**

User ID	Full Name	Status	Comment's Date	Comment's Time	Comments
10100019	LATA DATE	APPROVED	22.07.2020	09:38:21	Reviewed by 10100019 review committee and recommended to proceed further.

**Committee Comments / Remarks**

User ID	Full Name	Status	Comment's Date	Comment's Time	Comments
10100017	MUKESH NAWANI	APPROVED	22.07.2020	09:47:31	Reviewed and recommended by 10100017
10100024	MRINALINI KELKAR	APPROVED	22.07.2020	09:46:14	Reviewed by Audit dept 10100024

## Award Response

Buyer i.e. tender creator once receives review comments and recommendations from the committed the next step is to initiate for awarding the L1 bidder.

To do this activity, Buyer needs to login to the EBS portal by following the steps mentioned in section 1.1

Under the POWL screen, user can search for the particular RFx or select the particular RFx from the dashboard and click on "Display" button. The other way, is to click on the RFx number link to display the RFx.

RFx will be displayed in another screen. Click on the "Response and Awards" button as shown below.

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# SAP User Manual for Calibration/Statutory/Survey Maintenance

**Display RFX :**

RFX Number 5100000185    RFX Name 10100020 22.07.2020 15:31:01    Type Adv/Opn Tender 1 Env    Status Published    Created On 22.07.2020 15:38:46    Created By ADITI SHENDYE    Time Zone INDIA  
 Number of Suppliers 3    Number of Items 1    Version Number 1    Version Type Active Version    External Version Number 1

**Identification**  
 RFX Name: 10100020 22.07.2020 15:31:01  
 Port Tender No: MBPT/2020/07/2201  
 Tender Description: THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS.  
 RFX Type: Adv/Opn Tender 1 Env  
 Publication Type: Public RFX

**Event Parameters**  
 Currency: INR  
 Target Value: 60,000.00 INR  
 Detailed Price Information: Simple Price  
 Follow-On Document: Purchase Order or Contract  
 Bidder Can Change RFX Responses:     AMC Indicat  
 Allow Multiple RFX Responses for Each Company:     QSB  
 Display Weighting to Bidders:     Percentage Biddin

**Organization**  
 Purchasing Organization: Mumbai Port Trust Purchase Organisation  
 Purchasing Group: Material Mgmt Purchase Group [Show Members](#)

**Dates**  
 RFX Start Date: 23.07.2020 09:30:00  
 \* RFX Submission Date: 23.07.2020 11:00:00

**Tender Fee**  
 Tender Fee Percentage: 2  
 \* Tender Fee: 1,200.00 INR

**Security Deposit**  
 \* Security Deposit Required:   
 \* Security Deposit Percentage: 8

A new screen will be displayed as shown below. Go to the “Response Comparison tab and click on “Compare All Responses” button.

**Responses and Awards**

Remaining Time 0 Days 00:00:00    RFX Name 10100020 22.07.2020 15:31:01    Type Adv/Opn Tender 1 Env    Status Published    Number of Suppliers 3    RFX Number [5100000185](#)

Response Number	Response Version	Company Name	Bidder Name
6100000185	1	FELIX ENGG. CO.	FELIX ENGG. CO.
6100000187	1	M/S. A. A. TRADERS,	A. A. TRADERS,



## SAP User Manual for Calibration/Statutory/Survey Maintenance

A new screen will be displayed as shown below. Click on “Edit” button to proceed further to award the RfX response.

**Responses and Awards**

[Edit](#)
[Print Preview](#)
[Close](#)
[Export](#)
[Questions and Answers \( 0 \)](#)
[System Information](#)
[Create Memory Snapshot](#)

Remaining Time 0 Days 00:00:00 | RfX Name 10100020 22.07.2020 15:31:01 | Type Adv/Opn Tender 1 Env | Status Published | Number of Suppliers 3 | RfX Number [5100000185](#)

[Response Activity](#) | **[Response Comparison](#)** | [Surrogate Bidding](#) | [Technical Response Activity](#)

[Display Bidders](#) | Comparison Date: 23.07.2020 | [Back to Response Comparison Main View](#) | [Generate PDF](#) | [Download Response Comparison](#)

Expand All Collapse All

Header/Item No.	Item/Attributes	FELIX ENGG. CO. : FELIX ENGG. CO. : Submitted	A. A. TRADERS, : M/S. A. A. TRADERS, : Submitted
▼ Header	Description	10100020 22.07.2020 15:31:01	10100020 22.07.2020 15:31:01
	RfX Response Number	6100000185	6100000187
	Overall Bidder Rank	1	2
	Bidder Name	FELIX ENGG. CO.	A. A. TRADERS,
	Bidder Number	40000442	40000444
	Submission date and time	23.07.2020 11:45:58	23.07.2020 11:46:01
	Currency	INR	INR
	Total Value	57,000.00	58,500.00
	Deviation From RfX Response	0.000 %	2.632 %
	Accept	<input type="checkbox"/>	<input type="checkbox"/>
▶ Item:	Short Text	Cal/Stat/Survey Maint by External Vendor	Cal/Stat/Survey Maint by External Vendor
▶ Item:	Short Text	Two Coats - Oil Bound Distemper	Two Coats - Oil Bound Distemper

Total Accepted Items Value: 0.00  
 Best Bid Value: 57,000.00

After user Edit's, Accept field check box will be enabled. Check the box and then click on “Award” button as shown below.





# SAP User Manual for Calibration/Statutory/Survey Maintenance

**Responses and Awards**

Print Preview | Close | Display | **Award** | Export | Questions and Answers ( 0 ) | System Information | Create Memory Snapshot

Remaining Time 0 Days 00:00:00 | RFX Name 10100020 22.07.2020 15:31:01 | Type Adv/Opn Tender 1 Env | Status Published | Number of Suppliers

Response Activity | **Response Comparison** | Surrogate Bidding | Technical Response Activity

Display Bidders | Comparison Date: 23.07.2020 | Back to Response Comparison Main View | Generate PDF | Download Response Comparison

Expand All Collapse All

Header/Item No.	Item/Attributes	FELIX ENGG. CO. : FELIX ENGG. CO. : Submitted	A. A. TRADERS, : M/S. A. A. TRADERS, : Submitted
▶ Header	Description	10100020 22.07.2020 15:31:01	10100020 22.07.2020 15:31:01
▼ Item:	Short Text	Cal/Stat/Survey Maint by External Vendor	Cal/Stat/Survey Maint by External Vendor
	Delivery date	31.12.21	31.12.21
	Item-Level Rank	1	2
	Unit	LE	LE
	Net value	57,000.00	58,500.00
	Quantity	1	1
	Lot-Level Rank	1	2
	Product Cat.	72000000	72000000
	Currency	INR	INR
	Deviation From RFX Response	0.000 %	2.632 %
	Accept	<input checked="" type="checkbox"/>	<input type="checkbox"/>
▼ Item:	Short Text	Two Coats - Oil Bound Distemper	Two Coats - Oil Bound Distemper
	Delivery date	31.12.21	31.12.21

The response will be accepted in the system and it will follow an approval process. Below message will be displayed once the RFX response is awarded in system.

**Responses and Awards**

Edit | Print Preview | Close | Export | Questions and Answers ( 0 ) | System Information | Create Memory Snapshot

RFx response 6100000185 (10100020 22.07.2020 15:31:01) accepted

Remaining Time 0 Days 00:00:00 | RFX Name 10100020 22.07.2020 15:31:01 | Type Adv/Opn Tender 1 Env | Status Published | Number of Suppliers

Response Activity | **Response Comparison** | Surrogate Bidding | Technical Response Activity

Display Bidders | Comparison Date: 23.07.2020 | Back to Response Comparison Main View | Generate PDF | Download Response Comparison

Expand All Collapse All

Header/Item No.	Item/Attributes	FELIX ENGG. CO. : FELIX ENGG. CO. : Awaiting Approval	A. A. TRADERS, : M/S. A. A. TRADERS, : Submitted
▶ Header	Description	10100020 22.07.2020 15:31:01	10100020 22.07.2020 15:31:01
▶ Item:	Short Text	Cal/Stat/Survey Maint by External Vendor	Cal/Stat/Survey Maint by External Vendor
▶ Item:	Short Text	Two Coats - Oil Bound Distemper	Two Coats - Oil Bound Distemper
Total Accepted Items Value:		57,000.00	
Best Bid Value:		57,000.00	



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Buyer can check the approvers under the “Approval” tab as shown in screenshot below.

**Display RFx Response:**

Show My Tasks | Print Preview | Close | Technical RFx Response | Export | LOA | System Information | Create Memory Snapshot

RFx Response Number: 6100000185 | RFx Name: 10100020 22.07.2020 15:31:01 | Status: Awaiting Approval | Supplier Name: FELIX ENGG. CO. | Total Value: 57,000.00 INR | RFx Number: 5100000185

RFx Information | Items | Notes and Attachments | **Approval** | Tracking

Current Status: Active | Header Approval Note: [Text Area]  
Current Process Step: SRM RFx Response/Bid Approval  
Currently Processed By: MANDAR PARKAR  
Approval Process Data: [Download as XML](#)  
Follow Up:  Work Item to Requester at Process End

Header | Item

**Header Approval Status**

Add Approver | Remove Approver

Sequence	Process Step	Level Status	Status	Processor Determination	Processor	Received On	Processed On
001	SRM RFx Response/Bid Approval	Active (Assigned Process is Running)	Open (No Decision Made)	Get Manager of P. Group (Header) for Appr. for RFx Response	MANDAR PARKAR	23.07.2020 13:06:59	



## SAP User Manual for Calibration/Statutory/Survey Maintenance

### RFX Response Approval

Approver needs to login to EBS portal and follow steps mentioned in section 1.1

RFX Response Approver need to navigate to “Home” tab and then select the “Tasks” tab. The work item will be visible as shown below.

The screenshot shows the E-Procurement Portal interface. The 'Home' tab is selected in the top navigation bar. The 'Tasks (10/10)' tab is selected in the sub-navigation bar. A table of tasks is displayed with the following data:

Subject	Sent Date	Due Date	Status
<a href="#">Approve RFX Response 10100020 22.07.2020 15:31:01 Number 6100000185</a>	Today		New
<a href="#">Approve RFX Number 5100000131</a>	Jul 2, 2020		New
<a href="#">Approve RFX Number 5100000123</a>	Jun 26, 2020		New
<a href="#">Approve RFX Number 5100000098</a>	Jun 21, 2020		New
<a href="#">Approve RFX Number 5100000097</a>	Jun 21, 2020		New
<a href="#">Approve RFX Number 5100000108</a>	Jun 21, 2020		New
<a href="#">Approve RFX Number 5100000107</a>	Jun 21, 2020		New
<a href="#">Approve RFX Number 5100000104</a>	Jun 21, 2020		New
<a href="#">Approve RFX Number 5100000100</a>	Jun 21, 2020		New
<a href="#">Approve RFX Response 10100021 16.06.2020 22:55:11 Number 6100000064</a>	Jun 17, 2020		New

Click on the “**Approve RFX Response 61xxxxxx**” link. A new screen will get displayed. Click on “**Approve**” button. Once approved, Buyer i.e. tender creator will be able to create Purchase Order or Contract against this L1 response.



# SAP User Manual for Calibration/Statutory/Survey Maintenance

**Approve RFX Response:**

Approve | Reject | Print Preview | Close | Save | LOA | System Information | Create Memory Snapshot

RFX Response Number: 6100000185    Name: 10100020 19.07.2020 19:54:38    Status: Awaiting Approval    Supplier Name: FELIX ENGG. CO.    Total Value: 10,000.00 INR    RFX Number: 5100000178

Rfx Information | Items | Notes and Attachments | Approval | Tracking

General Data | Notes and Attachments | Questions | Messages

▼ Basic Data

<b>Bidder Contact Information</b>	<b>RFX Response Information</b>
Supplier Name: FELIX ENGG. CO.	Last Changed On: 20.07.2020 19:57:42 INDIA
Contact Person Name: FELIX ENGG. CO.	Last Changed By: ADITI SHENDYE
E-Mail: ag00615222@techmahindra.com	Creation Date: 20.07.2020 13:44:49 INDIA
Fax:	Created By: Mr. FELIX ENGG. CO.
Phone: 123456789	

<b>Event Parameters</b>	<b>Service and Delivery</b>
Process Type: QUOT	Incoterm: <input type="text"/>
Currency: Indian Rupee	
Detailed Price Information: Simple Price	<b>Status and Statistics</b>
Follow-On Document: Purchase Order or Contract	Created On: 20.07.2020 13:44:49 INDIA
Target Value of RFX in Original Currency: 160,000.00 INR	Created By: Mr. FELIX ENGG. CO.
Target Value of RFX in Selected Currency: 160,000.00 INR	Last Processed On: 20.07.2020 19:57:42 INDIA
Net Value of Header Items: 10,000.00 INR	Last Processed By: ADITI SHENDYE
Terms of Payment: <input type="text"/>	Port Tender No: MBPT/2020/07/230

Organization: LONG TENDER DESCRIPTION. THIS

**Display RFX Response:**

Show My Tasks | Print Preview | Close | Technical RFX Response | Export | LOA | System Information | Create Memory Snapshot

Action performed successfully

RFX Response Number: 6100000185    RFX Name: 10100020 22.07.2020 15:31:01    Status: Awaiting Approval    Supplier Name: FELIX ENGG. CO.    Total Value: 57,000.00 INR

Rfx Information | Items | Notes and Attachments | Approval | Tracking

General Data | Notes and Attachments | Questions | Messages

▼ Basic Data

<b>Bidder Contact Information</b>	<b>RFX Response Information</b>
Supplier Name: FELIX ENGG. CO.	Last Changed On: 23.07.2020 13:06:57 INDIA
Contact Person Name: FELIX ENGG. CO.	Last Changed By: ADITI SHENDYE
E-Mail: ag00615222@techmahindra.com	Creation Date: 23.07.2020 09:51:53 INDIA
Fax:	Created By: Mr. FELIX ENGG. CO.
Phone: 123456789	

## Create Purchase Order

This is a final step wherein Buyer will be converting the response for the L1 bidder to either

Purchase order / Service Order or Contract. To perform this activity, Buyer needs to login to the EBS portal by following the steps mentioned in section 1.1

Under the POWL screen, user can search for the particular RFX or select the particular RFX

from the dashboard and click on "Display" button. The other way, is to click on the RFX number link to display the RFX.



# SAP User Manual for Calibration/Statutory/Survey Maintenance

The screenshot shows the SAP Strategic Sourcing interface. The left sidebar contains navigation options like 'Strategic Sourcing', 'Contract Management', and 'Business Partner'. The main area is titled 'Strategic Sourcing' and shows 'Active Queries' with counts for various stages like 'Saved', 'Awaiting Approval', 'Published', etc. Below this is the 'RFxs - All' section with a search form. The 'Number' field is set to '510000176'. At the bottom, there is a table of RFx entries:

ID	RFx Number	RFx Name	Type	Status	RFx Category	Purchasing Organization	Submission Deadline	Responses
	510000176	10100020 19.07.2020 19:54:38	ZSTI	Published		Mumbai Port Trust Purchase Organisation	26.07.2020	1

RFx will be displayed. Click on the “Response and Awards” button.

The screenshot shows the 'Display RFx' screen. At the top, there are various action buttons, with 'Responses and Awards' highlighted. Below the buttons, the RFx details are displayed:

RFx Number: 510000176 | RFx Name: 10100020 19.07.2020 19:54:38 | Type: Single Tender | Status: Published | Created On: 19.07.2020 19:56:18 | Created By: ADITI SHENDYE | Time Zone: INDIA

Number of Items: 1 | Version Number: 1 | Version Type: Active Version | External Version Number: 1

The screen is divided into tabs: RFx Information, Bidders, Items, Notes and Attachments, Weights and Scores, Approval, and Tracking. The 'RFx Parameters' tab is active, showing 'RFx Parameters', 'Questions', and 'Notes and Attachments' sub-sections.

**Identification:** RFx Name: 10100020 19.07.2020 19:54:38; Port Tender No: MBPT2020/07/230; Tender Description: LONG TENDER DESCRIPTION. THIS TENDER TYPE IS USED FOR PROPRIETARY / OEM VENDORS. THIS FIELD IS OF 256 CHARACTERS.; RFx Type: Single Tender; Publication Type: Restricted RFx.

**Event Parameters:** Currency: INR; Target Value: 160,000.00 INR; Detailed Price Information: Simple Price; Follow-On Document: Purchase Order or Contract; Bidder Can Change RFx Responses: [checked]; Allow Multiple RFx Responses for Each Company: [checked]; Display Weighting to Bidders: [unchecked].

**Organization:** Purchasing Organization: Mumbai Port Trust Purchase Organisation; Tender Fee; Security Depos.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

A new screen will be displayed as shown below. Go to the “Response Comparison” tab and then click on “RFx Response number” link.

The screenshot shows the 'Responses and Awards' interface. At the top, there are navigation buttons: Print Preview, Close, Create Follow-on RFx, Export, Questions and Answers (0), System Information, and Create Memory Snapshot. Below this, a status bar displays: Remaining Time 0 Days 00:00:00, RFx Name 10100020 22.07.2020 15:31:01, Type Adv/Opn Tender 1 Env, Status Published, Number of Suppliers 3, and RFx Number 5100000185. The 'Response Activity' tab is selected and highlighted with a red box. Below the tabs, there are more navigation options: Details, Response On Behalf, Return Response, and Contract Mass Update. A table lists the responses:

Response Number	Response Status	Company Name	Bidder Name	Intent	Response Version	Last Changed on	Respor
<a href="#">610000188</a>	Rejected	CONA INDUSTRIES	CONA INDUSTRIES	◇	1	23.07.2020	
<a href="#">610000185</a>	Accepted	FELIX ENGG. CO.	FELIX ENGG. CO.	●	1	23.07.2020	
<a href="#">610000187</a>	Submitted	M/S. A. A. TRADERS,	A. A. TRADERS,	◇	1	23.07.2020	

RFx response will get displayed in another screen as shown below.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Options ▾

**Display RFX Response:**

Print Preview Close Technical RFX Response Export Create Purchase Order Simulate and Create Purchase Order Create Contract Publish To Catalog Undo Accept LOA System Information Create Memory Snapshot ?

RFX Response Number 610000185 RFX Name 10100020 22.07.2020 15:31:01 Status Accepted Supplier Name FELIX ENGG. CO. Total Value 57,000.00 INR RFX Number 5100000185

Rfx Information Items Notes and Attachments Approval Tracking

General Data Notes and Attachments Questions Messages

▼ Basic Data

<b>Bidder Contact Information</b> Supplier Name: FELIX ENGG. CO. Contact Person Name: FELIX ENGG. CO. E-Mail: ag00615222@techmahindra.com Fax: Phone: 123456789	<b>RFX Response Information</b> Last Changed On: 23.07.2020 13:13:03 INDIA Last Changed By: MANDAR PARKAR Creation Date: 23.07.2020 09:51:53 INDIA Created By: Mr. FELIX ENGG. CO.
--	--

<b>Event Parameters</b> Process Type: QUOT Currency: Indian Rupee Detailed Price Information: Simple Price Follow-On Document: Purchase Order or Contract Target Value of RFX in Original Currency: 60,000.00 INR Target Value of RFX in Selected Currency: 60,000.00 INR Net Value of Header Items: 57,000.00 INR Terms of Payment:	<b>Service and Delivery</b> Incoterm:
--	--

<b>Organization</b> Responsible Purchasing Organization: O 50000634 Mumbai Port Trust Purchase Organisation Responsible Purchasing Group: O 50000767 Material Mgmt Purchase Group Pre-Bid Location: MUMBAI PORT - CME DEPARTMENT	<b>Status and Statistics</b> Created On: 23.07.2020 09:51:53 INDIA Created By: Mr. FELIX ENGG. CO. Last Processed On: 23.07.2020 13:13:03 INDIA Last Processed By: MANDAR PARKAR Port Tender No: MBPT/2020/07/2201 Tender Description: THIS PLACE HOLDER CAN BE USED TO CAPTURE THE LONG DESCRIPTION OF THE TENDER. THE FIELD LENGTH IS 256 CHARACTERS. Pre-Bid End Date: 22.07.2020 Pre_Bid End Time: 16:00:00
---	---

Click on “Create Purchase Order” button.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Display RFX Response:

Print Preview | Close | Technical RFX Response | Export | **Create Purchase Order** | Simulate and Create Purchase Order | Create Contract | Publish To Catalog | Undo Accept | LOA | System Information | Create Memory Snapshot

RFX Response Number: 6100000185   RFX Name: 10100020 22.07.2020 15:31:01   Status: Accepted   Supplier Name: FELIX ENGG. CO.   Total Value: 57,000.00 INR   RFX Number: 5100000185

Rfx Information | Items | Notes and Attachments | Approval | Tracking

General Data | Notes and Attachments | Questions | Messages

▼ Basic Data

<b>Bidder Contact Information</b>	<b>RFX Response Information</b>
Supplier Name: FELIX ENGG. CO.	Last Changed On: 23.07.2020 13:13:03 INDIA
Contact Person Name: FELIX ENGG. CO.	Last Changed By: MANDAR PARKAR
E-Mail: ag00615222@techmahindra.com	Creation Date: 23.07.2020 09:51:53 INDIA
Fax:	Created By: Mr. FELIX ENGG. CO.
Phone: 123456789	

<b>Event Parameters</b>	<b>Service and Delivery</b>
Process Type: QUOT	Incoterm: <input type="text"/>
Currency: Indian Rupee	
Detailed Price Information: Simple Price	<b>Status and Statistics</b>
Follow-On Document: Purchase Order or Contract	Created On: 23.07.2020 09:51:53 INDIA
Target Value of RFX in Original Currency: 60,000.00 INR	Created By: Mr. FELIX ENGG. CO.
Target Value of RFX in Selected Currency: 60,000.00 INR	Last Processed On: 23.07.2020 13:13:03 INDIA
Net Value of Header Items: 57,000.00 INR	Last Processed By: MANDAR PARKAR
Terms of Payment: <input type="text"/>	Port Tender No: MBPT/2020/07/2201

A new window will get popped-up, select the transaction type and then click on “Create Purchas Order” button.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

The screenshot shows the SAP 'Display RFx Response' interface. At the top, there are navigation buttons: Print Preview, Close, Technical RFx Response, Export, Create Purchase Order, Simulate and Create Purchase Order, Create Contract, Publish To Catalog, LOA, System Information, and Create Memory Snapshot. Below this, the RFx details are displayed: RFx Response Number 6100000185, RFx Name 10100020 22.07.2020 15:31:01, Status Accepted, Supplier Name FELIX ENGG. CO., Total Value 57,000.00 INR, and RFx Number 5100000185. The main content area has tabs for Rfx Information, Items, Notes and Attachments, Approval, and Tracking. Under 'Rfx Information', there are sub-tabs for General Data, Notes and Attachments, Questions, and Messages. A 'Basic Data' section is expanded, showing Bidder Contact Information (Supplier Name: FELIX ENGG. CO., Contact Person Name: FELIX ENGG. CO., E-Mail: ag00615222@techmahindra.com, Fax: , Phone: 123456789) and Event Parameters (Process Type: QUOT, Currency: Indian Rupee, Detailed Price Information: Simple Price, Follow-On Document: Purchase Order or Contract, Target Value of RFx in Original Currency: 60,000.00 INR, Target Value of RFx in Selected Currency: 60,000.00 INR, Net Value of Header Items: 57,000.00 INR, Terms of Payment: ). A 'Create Purchase Order' dialog box is open in the center, prompting the user to 'Select from the following transaction types:'. The dialog contains a table with columns 'Transaction Type' and 'Description'. The first row is highlighted in yellow and contains 'ZZNB' and 'STD Purchase Order'. At the bottom of the dialog, there are 'Create Purchase Order' and 'Cancel' buttons. The background of the dialog is semi-transparent, showing parts of the main screen's right-hand side, including 'Information' (Created On: 23.07.2020 13:36:36 INDIA, ADITI SHENDYE, 23.07.2020 09:51:53 INDIA, Mr. FELIX ENGG. CO.), 'Service and Delivery' (Incoterm: ), and 'Status and Statistics' (Created On: 23.07.2020 09:51:53 INDIA, Created By: Mr. FELIX ENGG. CO., Last Processed On: 23.07.2020 13:36:36 INDIA, Last Processed By: ADITI SHENDYE, Port Tender No: MBPT/2020/07/2201).

PO will be created and replicated to backend system.

System will display message as “PO 4xxxxxxx” is in the process of transfer to back-end system” as shown in screenshot below



# SAP User Manual for Calibration/Statutory/Survey Maintenance

**Display RFX Response:**

Print Preview Close Technical RFX Response Export Create Purchase Order Simulate and Create Purchase Order Create Contract Publish To Catalog LOA System Information Create Memory Snapshot

PO 4000010071 is in the process of transfer to back-end system

RFX Response Number 6100000185 RFX Name 10100020 22.07.2020 15:31:01 Status Accepted Supplier Name FELIX ENGG. CO. Total Value 57,000.00 INR RFX Number 5100000185

Rfx Information Items Notes and Attachments Approval Tracking

General Data Notes and Attachments Questions Messages

**Basic Data**

**Bidder Contact Information**  
 Supplier Name: FELIX ENGG. CO.  
 Contact Person Name: FELIX ENGG. CO.  
 E-Mail: ag00615222@techmahindra.com  
 Fax:  
 Phone: 123456789

**RFX Response Information**  
 Last Changed On: 23.07.2020 13:36:36 INDIA  
 Last Changed By: ADITI SHENDYE  
 Creation Date: 23.07.2020 09:51:53 INDIA  
 Created By: Mr. FELIX ENGG. CO.

**Event Parameters**  
 Process Type: QUOT  
 Currency: Indian Rupee  
 Detailed Price Information: Simple Price  
 Follow-On Document: Purchase Order or Contract  
 Target Value of RFX in Original Currency: 60,000.00 INR  
 Target Value of RFX in Selected Currency: 60,000.00 INR  
 Net Value of Header Items: 57,000.00 INR  
 Terms of Payment:

**Service and Delivery**  
 Incoterm:

**Status and Statistics**  
 Created On: 23.07.2020 09:51:53 INDIA  
 Created By: Mr. FELIX ENGG. CO.  
 Last Processed On: 23.07.2020 13:36:36 INDIA  
 Last Processed By: ADITI SHENDYE

Port Tender No: MBPT/2020/07/2201

Please see the screenshot below of the PO that has got replicated to backend Hana system. This PO will be available for further processing.

**STD Purchase Order 4000010071 Created by PI\_USER**

Document Overview Off Print Preview Messages Personal Setting

STD Purchase Order 4000010071 Vendor 40000442 FELIX ENGG. CO. Doc. Date 23.07.2020

Delivery/Invoice Conditions Texts Address Communication Partners Additional Data Org. Data Status Customer Data Release strategy

Release group Z1 Release Group for PO Code Description Stat.  
 Release Strategy D1 Rel Strategy for PO P1 Approver 1  
 P2 Approver 2  
 P3 Approver 3  
 P4 Approver 4

Release indicator B Blocked, changeable with

S.	Itm	A	I	Material	Short Text	PO Quantity	O...	C Delv. Date	Net Price	Curr...	Per	O...	Matl Group	Pint	Stor.
1	F	D			Cal/Stat/Survey Maint by...	1	AU	D 31.12.2021	57,000.00	INR	1	AU	Constructio...	Mumbai Port Trust	

Item [ 1 ] Cal/Stat/Survey Maint by External Vendor

Delivery Schedule Delivery Invoice Conditions India Account Assignment Texts Delivery Address Confirmations Condition Control Retail

Title Mumbai Port Trust Address details



## SAP User Manual for Calibration/Statutory/Survey Maintenance

### Create/ Change Purchase Order

Select other Purchase order and enter the PO Number “4000010071”

STD Purchase Order 4000010071 Created by PI\_USER

Document Overview On | Print Preview | Messages | Personal Setting

STD Purchase Order 4000010071 Vendor 40000442 FELIX ENGG. CO. Doc. Date 23.07.2020

Select Document

Pur. Order 4000010071

Pur. Order  
 Purch. Requisition  
 SRM Contract

Other Document

S. Itm	A	I	Material	Short Text	PO Quantity	O...	C	Delv. Date	Net Price	Curr...	Per	O...	Matl Group	Plnt	Stor. L...
1	F	D		Cal/Stat/Survey Maint by...		1	AU	D 31.12.2021	57,000.00	INR	1	AU	Constructio...	Mumbai Port Trust	

Add Planning

Item [ 1 ] Cal/Stat/Survey Maint by External Vendor

Invoice | Conditions | India | Account Assignment | Texts | Delivery Address | Confirmations | Condition Control | Retail | Customer Data | Incoterms

Incoterms Version  
Incoterms  
Incoterms Location 1

Activate Window  
Go to Settings to activate



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Select Invoice tab and select Tax Code “V1” and in header Level Choose appropriate in Customer Data LD Clause and Save the Purchase Order for Approval Process.

The screenshot displays the SAP Purchase Order (PO) interface. The title bar shows 'Purchase Order' with menu options: Edit, Goto, Environment, System, Help. The main header area displays 'STD Purchase Order 4000010071 Created by PI\_USER'. Below this, document overview options like 'Document Overview On', 'Print Preview', 'Messages', and 'Personal Setting' are visible. The main data area shows the PO details: 'STD Purchase Order' with PO number '4000010071', Vendor '40000442 FELIX ENGG. CO.', and Document Date '23.07.2020'. A table lists items with columns: S., Itm, A, PO Quantity, O..., C, Deliv. Date, Net Price, Curr..., Per, O..., Matl Group, Plnt, Stor. Location, Batch, Stock Segment, and Reqmnt Segme. Item 1 is shown with a quantity of 1, delivery date 31.12.2021, and net price of 57,000.00 INR. Below the table are buttons for 'Default Values' and 'Add Planning'. The 'Item' section is expanded to the 'Invoice' tab, showing 'Invoicing Plan' and 'Tax Code' set to 'V1'. Other options include 'Inv. Receipt', 'Final Invoice', 'GR-Bed IV', 'S.-Based IV', and 'DP. Category'.



# SAP User Manual for Calibration/Statutory/Survey Maintenance

Click On customer Data and Select LD Clause

Purchase Order Edit Goto Environment System Help

STD Purchase Order 4000010071 Created by PI\_USER

Document Overview On Print Preview Messages Personal Setting

STD Purchase Order 4000010071 Vendor 40000442 FELIX ENGG. CO. Doc. Date 23.07.2020

Texts Address Communication Partners Additional Data Org. Data Status Customer Data Release strategy Payment Processing Versions

Despatch / Delivery Instruction  
 Insurance Policy No. GeM Purchase Order No.  
 Security Deposit RFX No.

LD Clauses Terms & Conditions

S...	Item	A	PO Quantity	O...	C	Delv. Date	Net Price	Curr...	Per	O...	Matl Group	Plnt	Stor. Location	Batch	Stock Segment	Reqmnt Segme
	1	F		1	AU	31.12.2021	57,000.00	INR	1	AU	Constructio...	Mumbai Port Trust				
								INR								
								INR								
								INR								
								INR								
								INR								

Default Values Addl Planning



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Choose from the option for LD Clause and Press “Enter”

STD Purchase Order 4000010071 Created by PI\_USER

Document Overview On | Print Preview | Messages | Personal Setting

STD Purchase Order 4000010071 Vendor 40000442 FELIX ENGG. CO. Doc. Date 23.07.2020

Texts Address Communication Partners Additional Data Org. Data Status Customer Data Release strategy Payment Processing Versions

Liquidation Damage Entries

S. No.	LD Clause	LD Clause Description	Minimum LD %	Period	Maximum LD %
<input checked="" type="checkbox"/>	LD1	LD Calculated Per day, Maximum	1.00	DAY	10.00
<input type="checkbox"/>	LD2	LD Calculated Per Week, Maximum	0.50	WEEK	5.00

Activate Window  
Go to Settings to activate



## SAP User Manual for Calibration/Statutory/Survey Maintenance



Press "Enter"


The screenshot shows the SAP 'Purchase Order' screen for document 4000010071. A dialog box titled 'LD Clause' is open, asking 'Retain Changes to LD Clause Selections?' with 'Yes', 'No', and 'Cancel' buttons. The background shows the purchase order details and a table of items.


Item	S.	Item	A	PO	Quantity	O...	C Delv. Date	Net Price	Curr...	Per	O...	Matl Group	Pint	Stor. Location	Batch	Stock Segment	Reqmnt Segm
1			F			1	AU D 31.12.2021	57,000.00	INR	1	AU	Constructio..	Mumbai Port Trust				
									INR								
									INR								
									INR								
									INR								
									INR								



# SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “  ” check Button. System will check for errors in document. If no errors found, system will show “  No messages issued during check ” Message.

Click on “  ” Save Button. System will Create Purchase Order document & displays “

 STD Purchase Order 4000010071 changed

” Message.

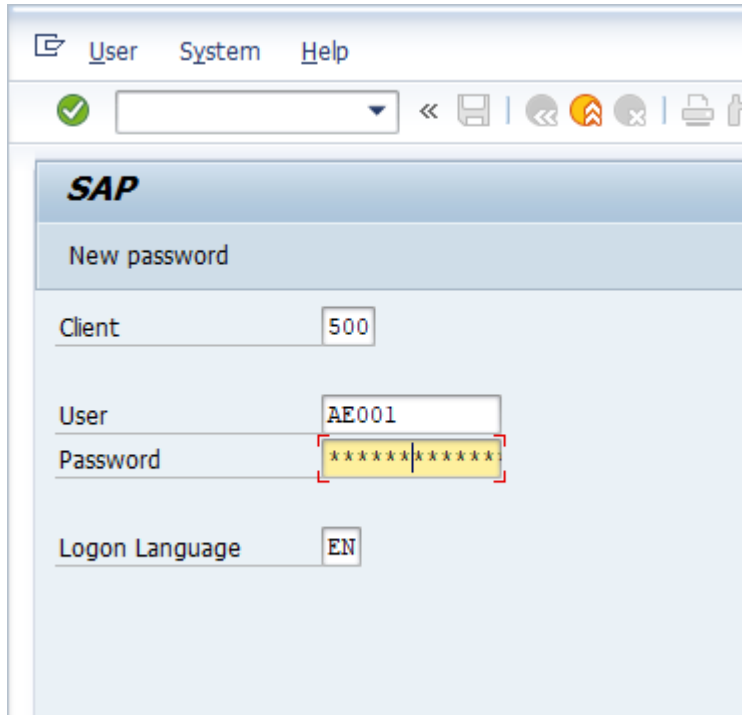




## SAP User Manual for Calibration/Statutory/Survey Maintenance

### Release of Purchase Order

Login as **Approver 1** (Assistant Engineer) in SAP System.



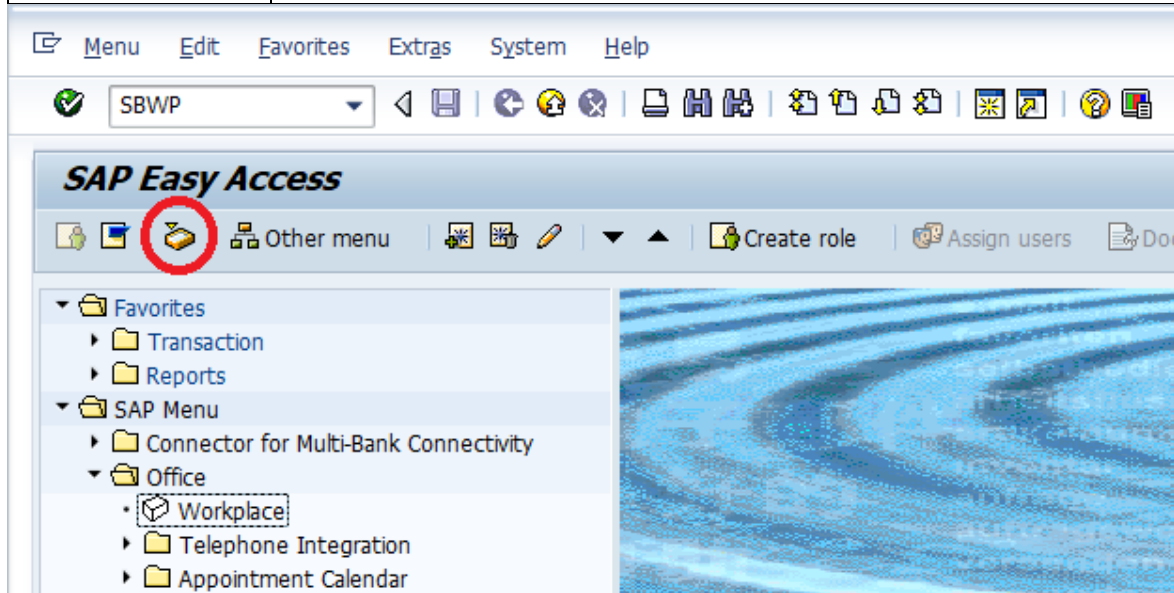
The screenshot shows the SAP login interface. At the top, there is a menu bar with 'User', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main content area is titled 'SAP' and contains a 'New password' section. Below this, there are four input fields: 'Client' with the value '500', 'User' with the value 'AE001', 'Password' with a masked password '\*\*\*\*\*', and 'Logon Language' with the value 'EN'. The password field is highlighted with a red border.

## SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “” **SAP Business Workspace** Button.

Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.

Transaction Code	SBWP
Menu Path	Easy Access → SAP Menu → Office → Workplace





## SAP User Manual for Calibration/Statutory/Survey Maintenance

Expand “Inbox” button, under workflow “Approve Purchase Order 4000010071” message will appear.

The screenshot shows the SAP inbox interface. On the left, the navigation pane shows the 'Inbox' folder expanded, with 'Workflow 28' selected. The main area displays a table of workflow items. The first item is highlighted, showing the title 'Please approve the Purchase Order 4000010071'. Below the table, the details for this item are shown, including a description and objects/attachments.

Ex	Title	Status	Work Item ID	Creation Da	Creation	P	At	Co	W	Dynamic column
	Please approve the Purchase Order 4000010071		415625	23.07.2020	12:59:47	5				
	Please approve the Purchase Order 4000010064		414818	22.07.2020	11:52:04	5				
	Please approve the Purchase Request 2001000963		415320	20.07.2020	02:34:58	5				
	Please approve the Purchase Request 2001000963		414579	20.07.2020	02:32:46	5				
	Please approve the Purchase Request 2001000962		414487	19.07.2020	15:13:42	5				
	Please approve the Purchase Request 2001000962		414486	19.07.2020	15:13:02	5				
	Please approve the Purchase Request 2001000961		415262	19.07.2020	15:10:39	5				
	Please approve the Purchase Request 2001000961		415261	19.07.2020	15:10:16	5				
	Please approve the Purchase Request 2001000959		415260	19.07.2020	15:10:03	5				
	Please approve the Purchase Request 2001000959		414485	19.07.2020	15:07:07	5				
	Please approve the Purchase Request 2001000959		414484	19.07.2020	15:06:38	5				
	Please approve the Purchase Request 2001000959		415258	19.07.2020	15:05:51	5				
	Please approve the Purchase Request 2001000959		415259	19.07.2020	15:05:51	5				

**Please approve the Purchase Order 4000010071**

**Description**  
Select one of the available decision options. This completes the processing of this step.  
Before you make a decision, you can display the


**Objects and attachments**  
No attachments or objects exist

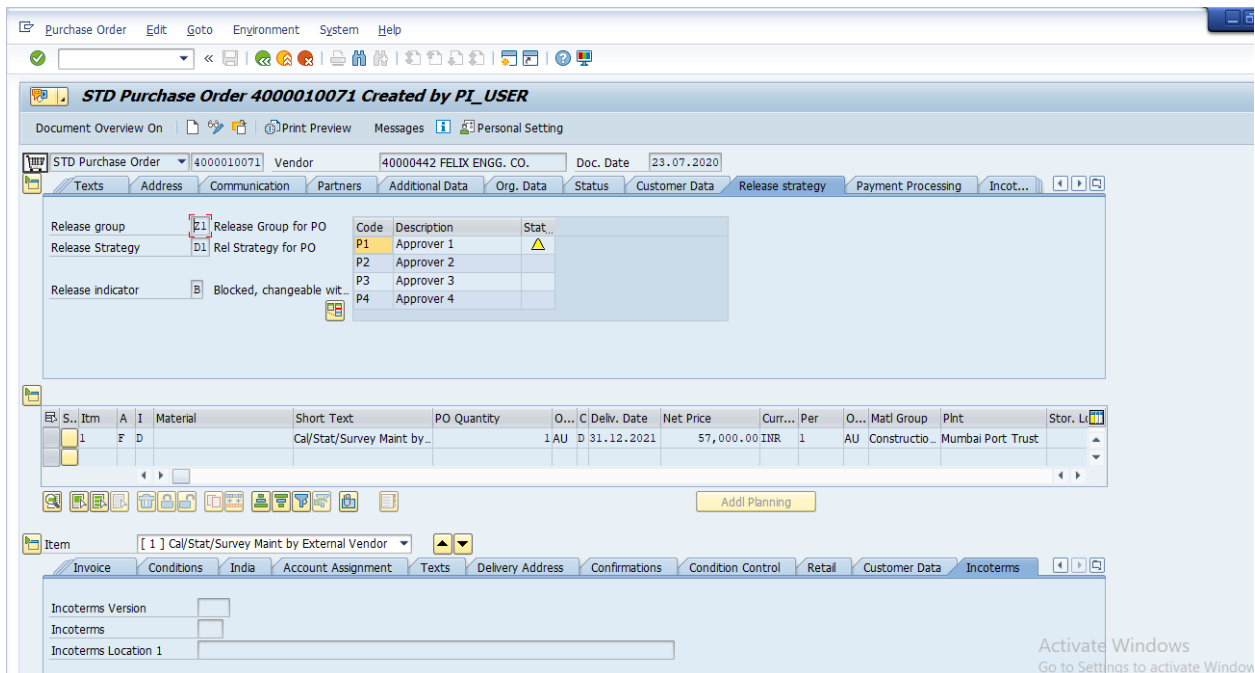
Activate Windows



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Double Click on the “Please Approve Purchase Order 4000010071” message. It will open the Purchase requisition document in Display mode.

Click on “  “ **Back** Button. System will open Decision step in workflow screen.



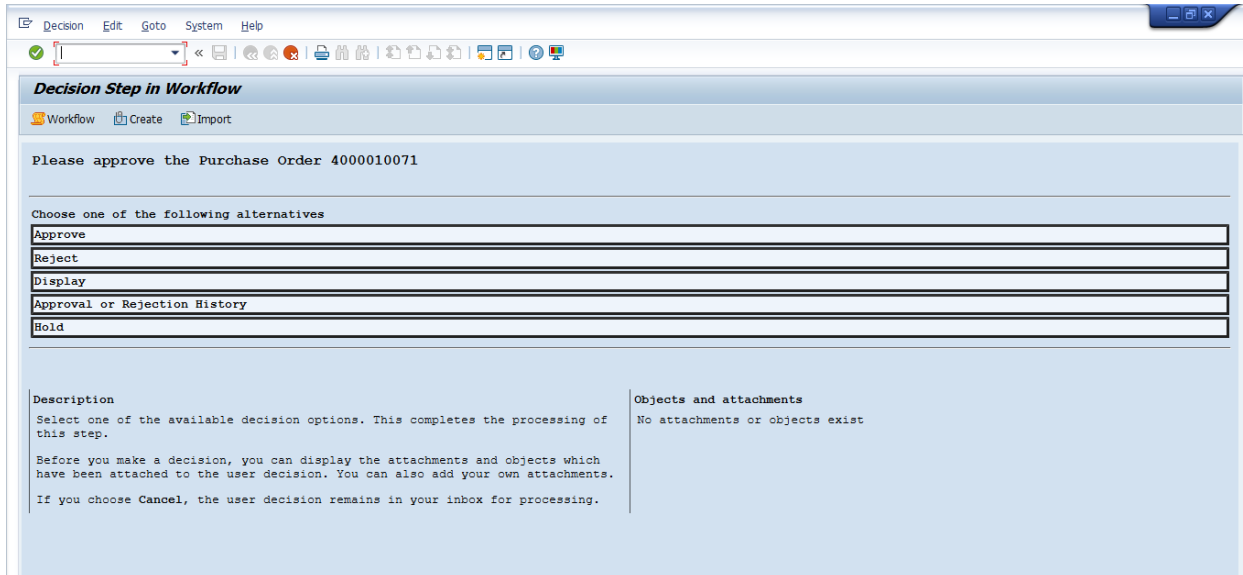
The screenshot shows the SAP interface for a Purchase Order (PO) with ID 4000010071. The document title is "STD Purchase Order 4000010071 Created by PI\_USER". The vendor is 40000442 FELIX ENGG. CO. and the document date is 23.07.2020. The release group is E1 (Release Group for PO) and the release strategy is D1 (Rel Strategy for PO). The release indicator is B (Blocked, changeable with PO). The PO contains one item (Material 1) with a net price of 57,000.00 INR. The item description is "Cal/Stat/Survey Maint by...". The screenshot also shows the "Release Group" table with columns Code, Description, and Stat.

Code	Description	Stat.
P1	Approver 1	
P2	Approver 2	
P3	Approver 3	
P4	Approver 4	

Additional fields shown include Incoterms Version, Incoterms, and Incoterms Location 1.



## SAP User Manual for Calibration/Statutory/Survey Maintenance



Click on “**Approve**” Button to approve the Purchase Order.

Purchase Order will be approved with level 1.

Purchase Order Approval Request notification is forwarded to Approver 2



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Login as **Approver 2** (Executive Engineer) in SAP System.

The screenshot shows the SAP login interface. At the top, there is a menu bar with 'User', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main content area is titled 'SAP' and contains the following fields:

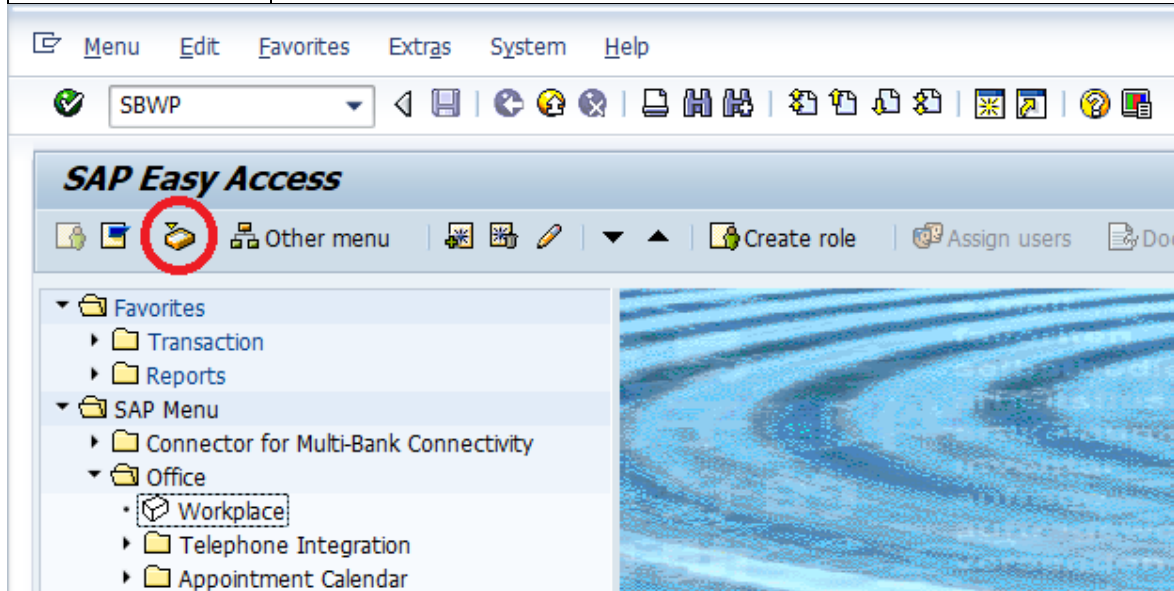
Client	500
User	EE001
Password	*****
Logon Language	EN

## SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “” **SAP Business Workspace** Button.

Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.

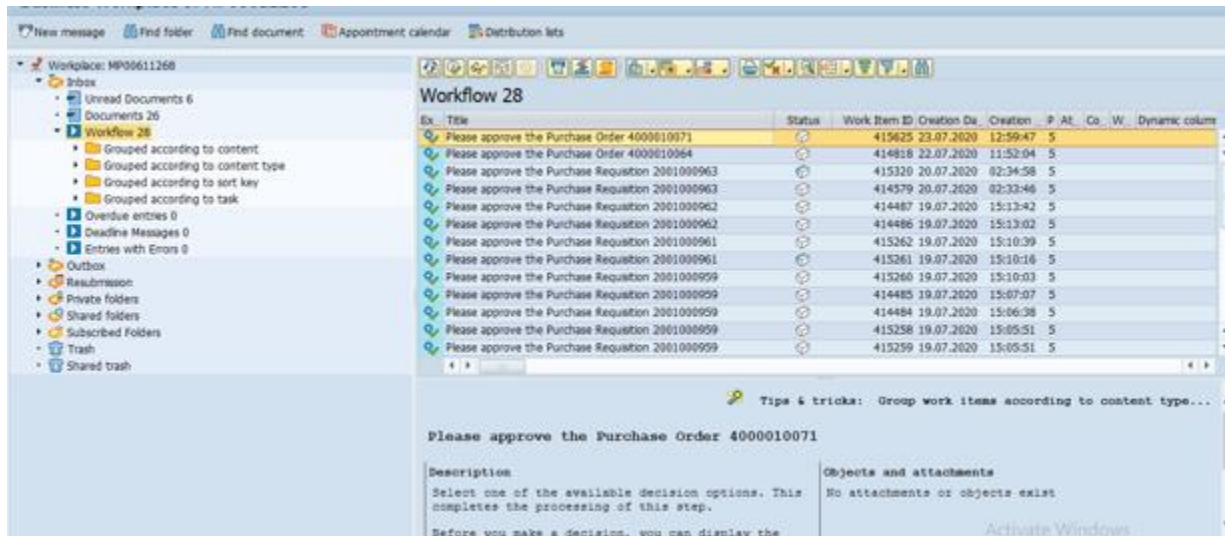
Transaction Code	SBWP
Menu Path	Easy Access → SAP Menu → Office → Workplace



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Expand “**Inbox**” button, under workflow “**Approve Purchase Order 4000010071**” message will appear.

Double Click on the “**Please Approve Purchase Order 4000010071**” message. System will open the Purchase Order document in Display mode.



Ex.	Title	Status	Work Item ID	Creation Da.	Creation	P. At.	Co.	W.	Dynamic column
1	Please approve the Purchase Order 4000010071	Open	415625	23.07.2020	12:59:47	5			
2	Please approve the Purchase Order 4000010064	Open	414818	22.07.2020	11:52:04	5			
3	Please approve the Purchase Requisition 2001000963	Open	415320	20.07.2020	02:34:58	5			
4	Please approve the Purchase Requisition 2001000963	Open	414579	20.07.2020	02:32:46	5			
5	Please approve the Purchase Requisition 2001000962	Open	414487	19.07.2020	15:13:42	5			
6	Please approve the Purchase Requisition 2001000962	Open	414485	19.07.2020	15:13:02	5			
7	Please approve the Purchase Requisition 2001000961	Open	415262	19.07.2020	15:10:39	5			
8	Please approve the Purchase Requisition 2001000961	Open	415261	19.07.2020	15:10:16	5			
9	Please approve the Purchase Requisition 2001000959	Open	415260	19.07.2020	15:10:03	5			
10	Please approve the Purchase Requisition 2001000959	Open	414485	19.07.2020	15:07:07	5			
11	Please approve the Purchase Requisition 2001000959	Open	414484	19.07.2020	15:06:38	5			
12	Please approve the Purchase Requisition 2001000959	Open	415258	19.07.2020	15:05:51	5			
13	Please approve the Purchase Requisition 2001000959	Open	415259	19.07.2020	15:05:51	5			


Tip & tricks: Group work items according to content type...

Please approve the Purchase Order 4000010071

Description  
Select one of the available decision options. This completes the processing of this step.  
Before you make a decision, you can display the

Objects and attachments  
No attachments or objects exist.

Activate Windows

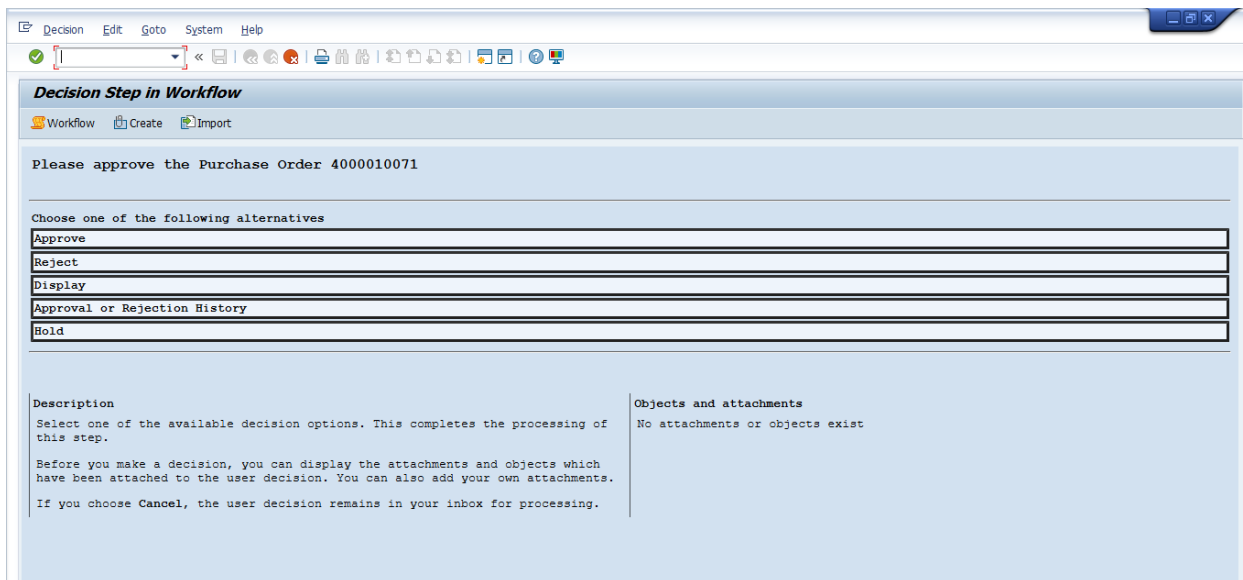
Click on “” **Back** Button. System will open Decision step in workflow screen.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “**Approve**” Button to approve the Purchase Order



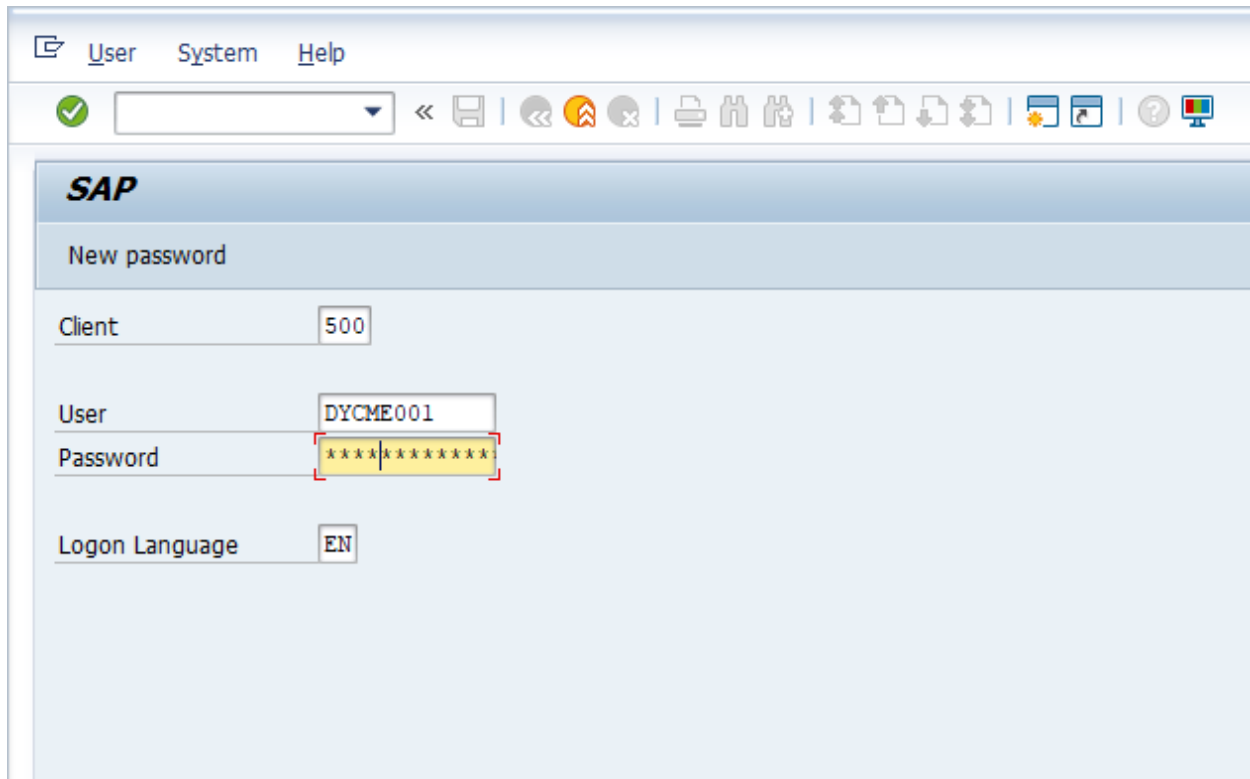
Purchase Order will be approved with level 2.

Purchase Order Approval Request notification is forwarded to Approver 3.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Login as **Approver 3** (Dy CME) in SAP System.



The screenshot shows the SAP login interface. At the top, there is a menu bar with 'User', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main content area is titled 'SAP' and contains the following fields:

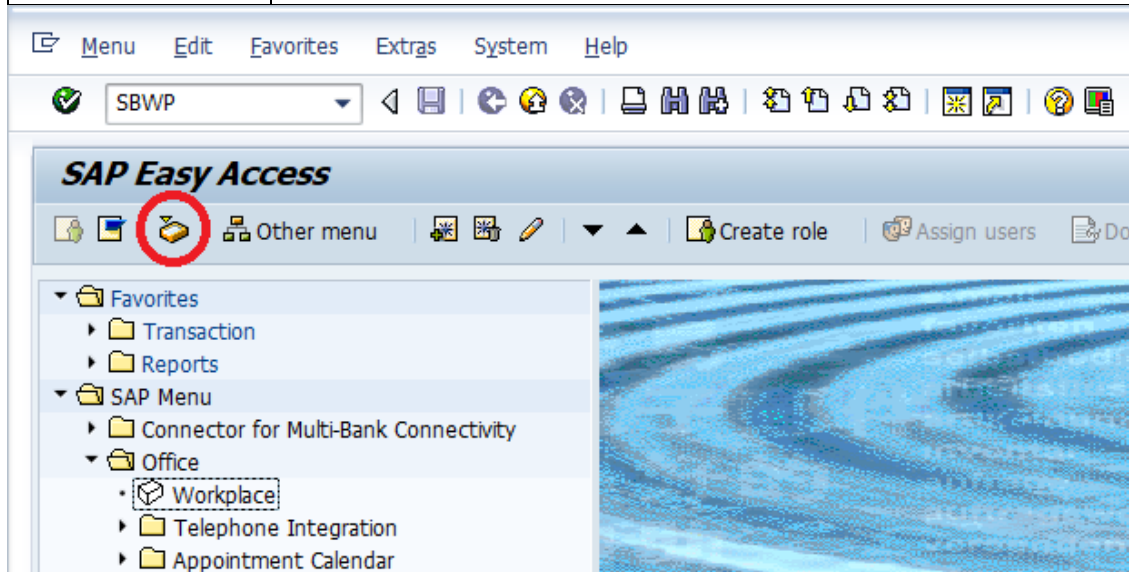
- New password**: A header for the password section.
- Client**: A text box containing the value '500'.
- User**: A text box containing the value 'DYCME001'.
- Password**: A text box containing ten asterisks '\*\*\*\*\*'.
- Logon Language**: A text box containing the value 'EN'.

## SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “” **SAP Business Workspace** Button.

Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.

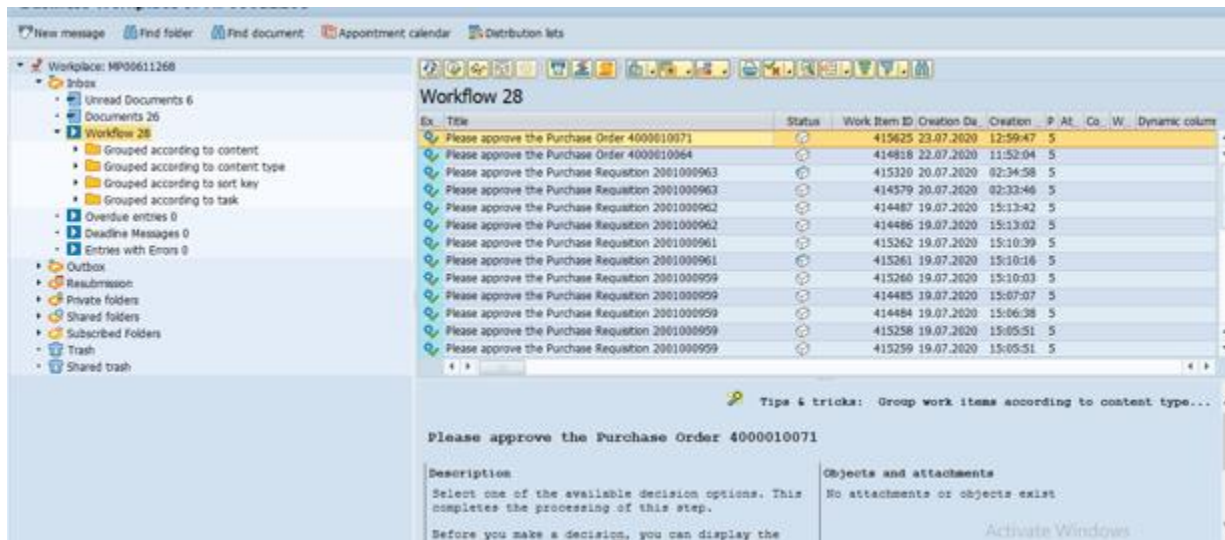
Transaction Code	SBWP
Menu Path	Easy Access → SAP Menu → Office → Workplace



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Expand “Inbox” button, under workflow “**Approve Purchase Order 4000010071**” message will appear.


Double Click on the “**Please Approve Purchase Order 4000010071**” message. System will open the Purchase Order document in Display mode.



The screenshot shows the SAP inbox interface. On the left, the 'Inbox' folder is expanded to show 'Workflow 28'. The main area displays a table of workflow items:

Ex.	Title	Status	Work Item ID	Creation Da	Creation	P	At	Co	W	Dynamic colum
	Please approve the Purchase Order 4000010071		415625	23.07.2020	12:59:47	5				
	Please approve the Purchase Order 4000010064		414818	22.07.2020	11:52:04	5				
	Please approve the Purchase Request 2001000963		415310	20.07.2020	02:34:58	5				
	Please approve the Purchase Request 2001000963		414379	20.07.2020	02:32:46	5				
	Please approve the Purchase Request 2001000962		414487	19.07.2020	15:13:42	5				
	Please approve the Purchase Request 2001000962		414486	19.07.2020	15:13:02	5				
	Please approve the Purchase Request 2001000961		415262	19.07.2020	15:10:39	5				
	Please approve the Purchase Request 2001000961		415261	19.07.2020	15:10:16	5				
	Please approve the Purchase Request 2001000959		415260	19.07.2020	15:10:03	5				
	Please approve the Purchase Request 2001000959		414485	19.07.2020	15:07:07	5				
	Please approve the Purchase Request 2001000959		414484	19.07.2020	15:06:38	5				
	Please approve the Purchase Request 2001000959		415258	19.07.2020	15:05:51	5				
	Please approve the Purchase Request 2001000959		415259	19.07.2020	15:05:51	5				

Below the table, the selected item 'Please approve the Purchase Order 4000010071' is displayed in a decision step. The description reads: 'Select one of the available decision options. This completes the processing of this step. Before you make a decision, you can display the'. The objects and attachments section is empty.

Click on “” Back Button. System will open Decision step in workflow screen.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “**Approve**” Button to approve the Purchase Order.

The screenshot shows the SAP 'Decision Step in Workflow' interface. At the top, there is a menu bar with 'Decision', 'Edit', 'Goto', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main content area is titled 'Decision Step in Workflow' and contains the following elements:

- Buttons for 'Workflow', 'Create', and 'Import'.
- A message: 'Please approve the Purchase Order 4000010071'.
- A section titled 'Choose one of the following alternatives' with a list of options: 'Approve', 'Reject', 'Display', 'Approval or Rejection History', and 'Hold'.
- A 'Description' section: 'Select one of the available decision options. This completes the processing of this step. Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments. If you choose Cancel, the user decision remains in your inbox for processing.'
- An 'Objects and attachments' section: 'No attachments or objects exist'.

Purchase Order will be approved with level 3.

Purchase Order Approval Request notification is forwarded to Approver 4.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Login as **Approver 4** (CME) in SAP System.

The screenshot shows the SAP login interface. At the top, there is a navigation bar with 'User', 'System', and 'Help' menus. Below this is a toolbar with various icons. The main content area is titled 'SAP' and contains a 'New password' section. The login fields are as follows:

Client	500
User	CME001
Password	***** *****
Logon Language	EN

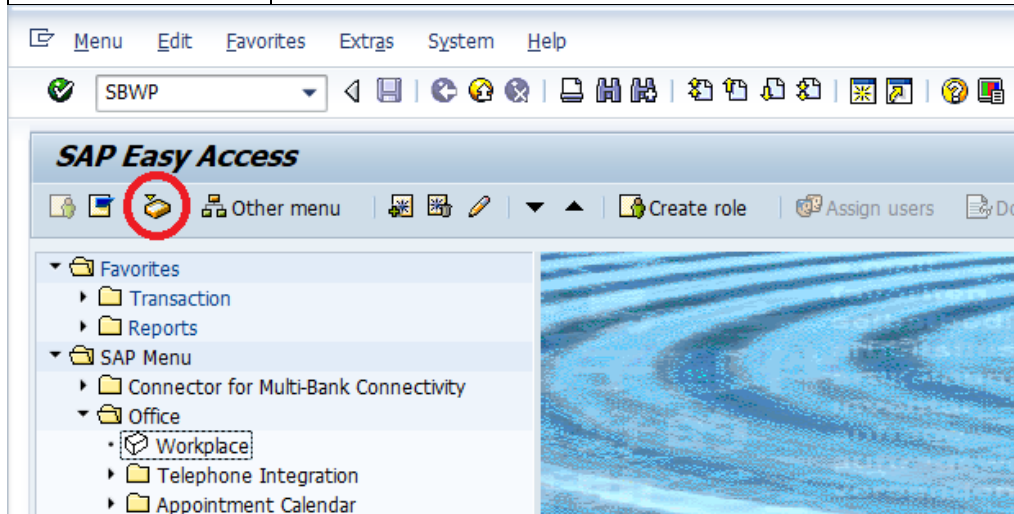
A red arrow points to the 'Client' field.

## SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “” **SAP Business Workspace** Button.

Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.

Transaction Code	SBWP
Menu Path	Easy Access → SAP Menu → Office → Workplace





## SAP User Manual for Calibration/Statutory/Survey Maintenance

Expand “Inbox” button, under workflow “Approve Purchase Order 4000010071” message will appear.

The screenshot shows the SAP inbox interface. On the left, the 'Inbox' folder is expanded, showing a 'Workflow 28' folder. The main area displays a table of workflow items. The first item is highlighted, showing the title 'Please approve the Purchase Order 4000010071'. Below the table, the details for this item are shown, including a description and objects and attachments.

Ex	Title	Status	Work Item ID	Creation Da	Creation	P	At	Co	W	Dynamic column
	Please approve the Purchase Order 4000010071		415625	23.07.2020	12:59:47	5				
	Please approve the Purchase Order 4000010064		414818	22.07.2020	11:52:04	5				
	Please approve the Purchase Requisition 2001000963		415320	20.07.2020	02:34:58	5				
	Please approve the Purchase Requisition 2001000963		414579	20.07.2020	02:32:46	5				
	Please approve the Purchase Requisition 2001000962		414487	19.07.2020	15:13:42	5				
	Please approve the Purchase Requisition 2001000962		414486	19.07.2020	15:13:02	5				
	Please approve the Purchase Requisition 2001000961		415262	19.07.2020	15:10:39	5				
	Please approve the Purchase Requisition 2001000961		415261	19.07.2020	15:10:16	5				
	Please approve the Purchase Requisition 2001000959		415260	19.07.2020	15:10:03	5				
	Please approve the Purchase Requisition 2001000959		414485	19.07.2020	15:07:07	5				
	Please approve the Purchase Requisition 2001000959		414484	19.07.2020	15:06:38	5				
	Please approve the Purchase Requisition 2001000959		415258	19.07.2020	15:05:51	5				
	Please approve the Purchase Requisition 2001000959		415259	19.07.2020	15:05:51	5				

**Please approve the Purchase Order 4000010071**

**Description**  
Select one of the available decision options. This completes the processing of this step.  
Before you make a decision, you can display the


**Objects and attachments**  
No attachments or objects exist



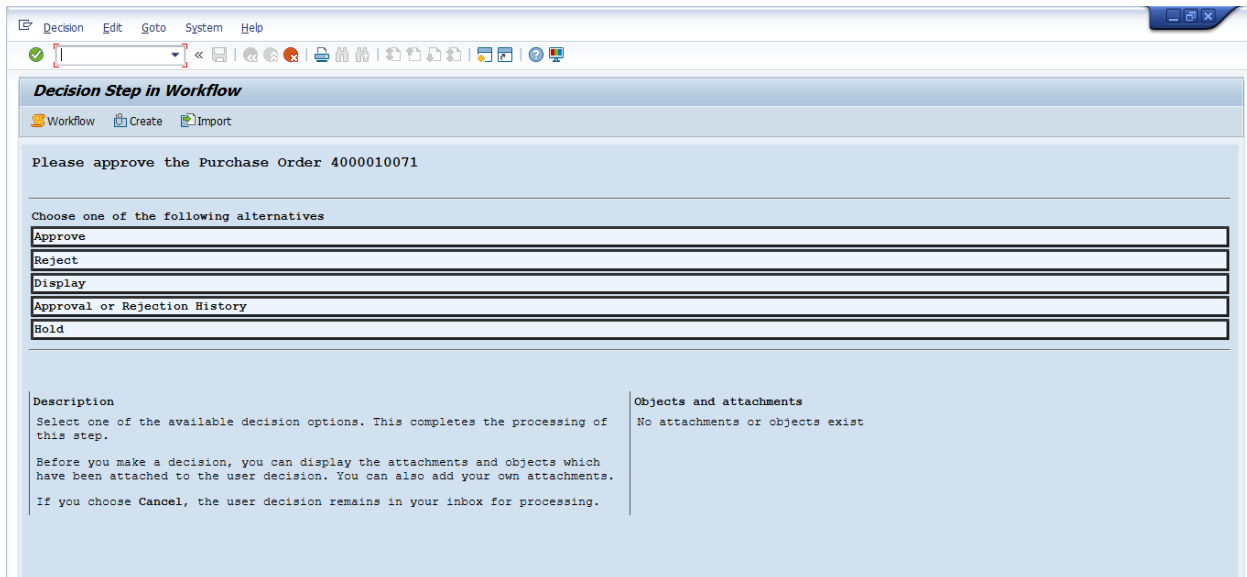


## SAP User Manual for Calibration/Statutory/Survey Maintenance

Double Click on the “**Please Approve Purchase Order 4000010071**” message. System will open the Purchase Order document in Display mode.

Click on “” **Back** Button. System will open Decision step in workflow screen.

Click on “**Approve**” Button to approve the Purchase Order.



Purchase Order will be approved with level 4.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Once the Purchase Order is approved by all 4 level approvers, a notification is triggered to Purchase Order Initiator and all preceding approvers.

The screenshot displays the SAP Business Workplace interface for user MP00611268. The left sidebar shows the folder structure, including 'Inbox' and 'Unread Documents 10'. The main pane shows a list of unread documents, with the top entry selected:

Me...	Ty...	Title	At...	Author	Date recei...	Co...	Re...	Recip...
✉	✉	Purchase Order 4000010071 is...		SAP_WFRT	23.07.2020			1

Below the list, the content of the selected email is displayed:

**Purchase Order 4000010071 is approved.**

Hello Sir/Madam,

Purchase Order 4000010071 is approved.

Approved by: MP00611268 MP00611268

Regards,



## SAP User Manual for Calibration/Statutory/Survey Maintenance

### Display of Purchase Order

Enter T code ME23N and Enter the other Purchase order No 4000010071 and select Release Strategy System shows that purchase order released all four levels.

The screenshot shows the SAP Purchase Order (PO) display for document 4000010071. The vendor is FELIX ENGG. CO. and the document date is 23.07.2020. The release strategy is 'Released' (G). The release strategy table shows four approver levels (P1 to P4), all with a green checkmark in the 'Stat...' column, indicating they are released.

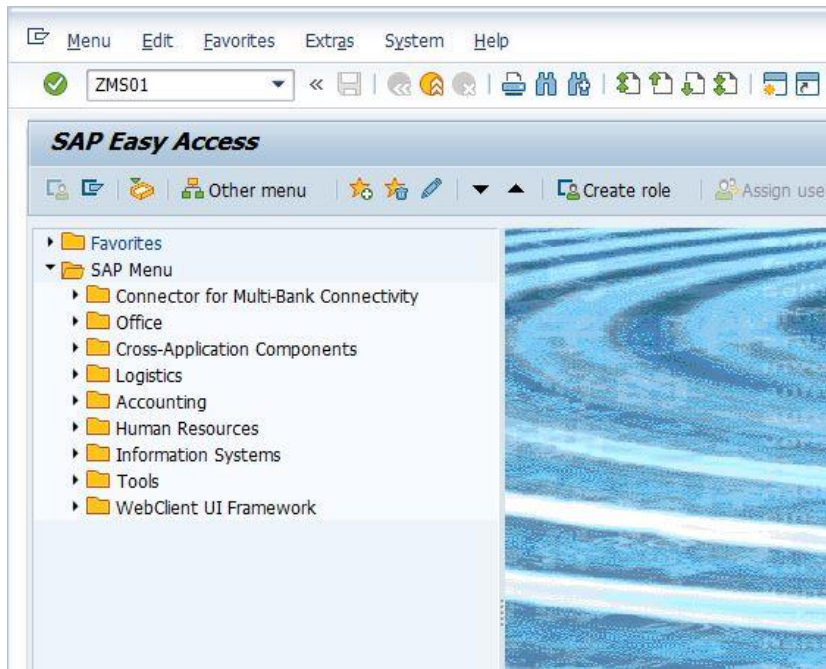
Item	S.	Item	A	I	Material	Short Text	PO Quantity	O...	C	Deliv. Date	Net Price	Curr...	Per	O...	Matl Group	Plnt	Stor. Li
1	F	D				Cal/Stat/Survey Maint by...		1	AU	D 31.12.2021	57,000.00	INR	1	AU	Constructio..	Mumbai Port Trust	



## SAP User Manual for Calibration/Statutory/Survey Maintenance

### Create/ Change Measurement Sheet

Enter Transaction code ZMS01 in command Bar





## SAP User Manual for Calibration/Statutory/Survey Maintenance

In Create Measurement Sheet Screen, provide below details;

Service Order: 4000010071

Company Code: 1000

System will display Service line item details from service purchase order.

The screenshot shows the SAP 'Create Measurement Sheet' interface. At the top, there are navigation icons and a 'Clear Screen' button. Below this, the 'Service Order' field is populated with '4000010071' and 'Company Code' with '1000'. There are also fields for 'Plant', 'Purchase Group', and 'Doc. Date'. An 'Attachments' section includes 'Doc. Type' and 'File name' fields. The main part of the screen is divided into two tables. The left table is titled 'Service Order - Line Items' and is currently empty. The right table is titled 'Services for Item' and contains a dropdown menu and a table with columns: Line, Service No, Description, Text, Input Measurements, BOQ Qty, and BOQ Amount. The 'Input Measurements' column contains multiple rows of 'Input Measurements' with a small icon to the left of each entry.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “ **Input Measurements** ” Input measurement Button. System will open Backup sheet screen

**Create Measurement Sheet**

Service Order: 4000010071 | Company Code: 1000 | Mumbai Port Trust | Plant: 1000 | Mumbai Port Trust | Doc. Date: 23.07.2020  
Vendor: 40000442 | FELIX ENGG. CO. | Purchase Group: 101 | Material Mgmt

Attachments

Item	Material/Service	Quantity	U
1	Cal/Stat/Survey Maint by Exte...	1.000	A

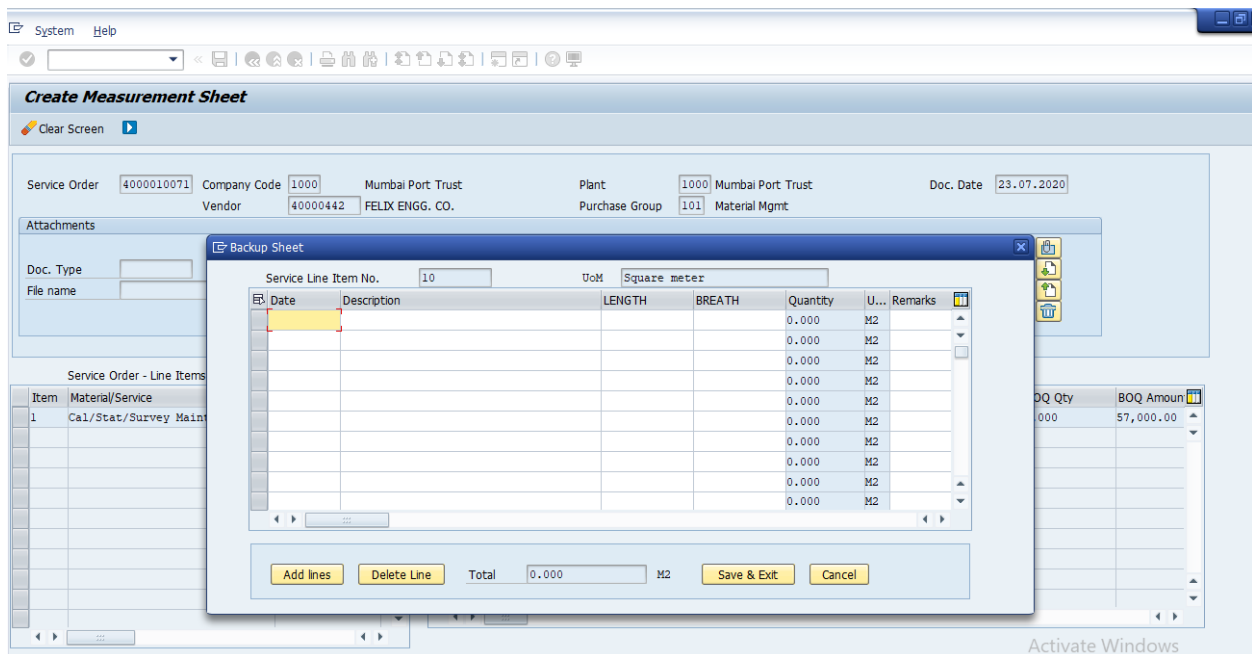
Services for Item: 1 Cal/Stat/Survey Maint by External Vendor

Line	Service No	Description	Text	Input Measurements	BOQ Qty	BOQ Amount
10	8300000085	Two Coats - Oil Bound Distemper	Input Measurements	Input Measurements	3.000	57,000.00



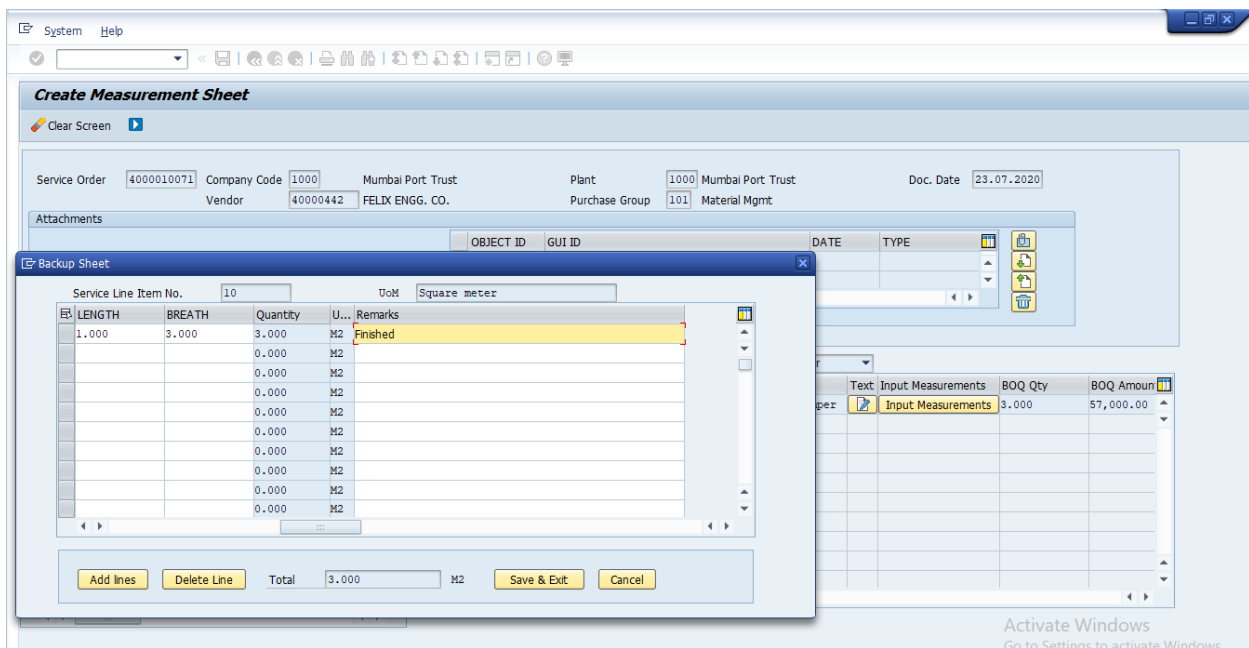
## SAP User Manual for Calibration/Statutory/Survey Maintenance

By Clicking input Measurement the below input screen will appear

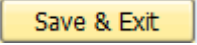


## SAP User Manual for Calibration/Statutory/Survey Maintenance

Enter the measurement details

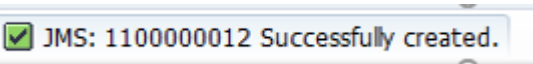


In Back up screen, record the service activity details.

Click on “  “ Button.

System will Update the data recorded against the service line item. Current JMS Quantity will be updated in Measurement sheet.

Click on “  “ icon

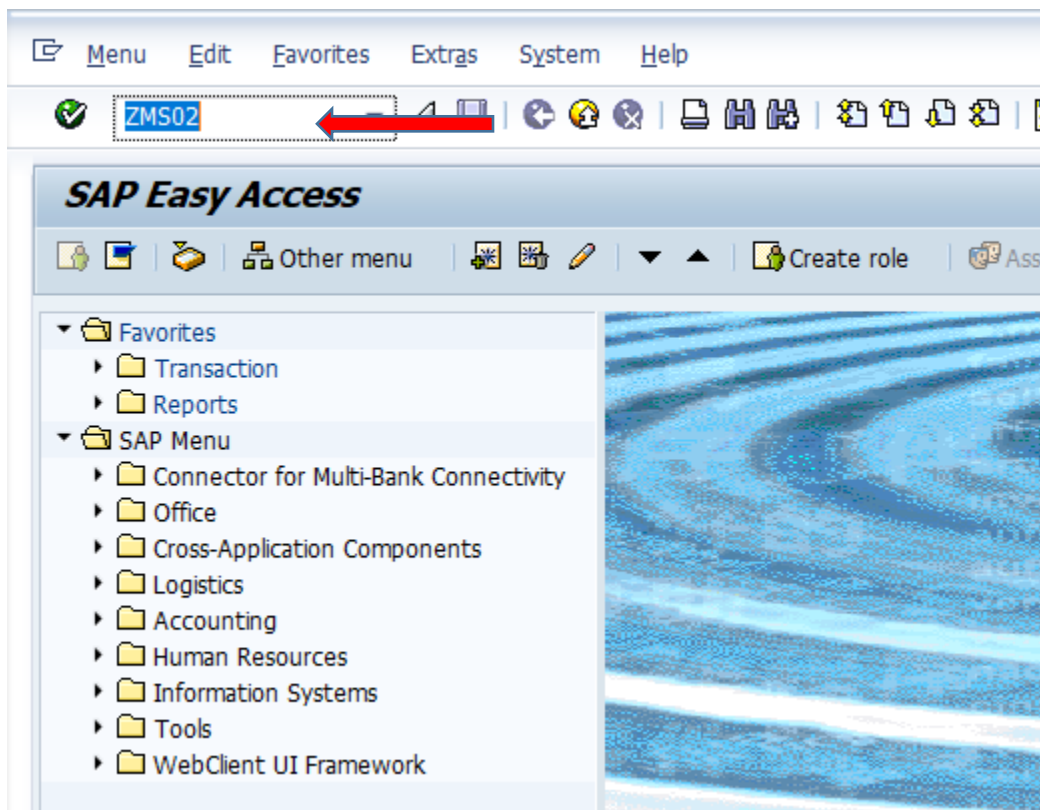
System will Create Measurement sheet & displays “  :” Message.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

### Change Measurement Sheet:

Enter Transaction Code ZMS02 in the Command Bar.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

Enter following data.


Company Code: 1000

JMS No:1100000012.

And Press “Enter”

Click on “” Workflow will be initiated

**Change Measurement Sheet**

Clear Screen 

Service Order: 4000010071 Company Code: 1000 Mumbai Port Trust Plant: 1000 Mumbai Port Trust Doc. Date: 23.07.20  
JMS No.: 1100000012 Vendor: 40000442 FELIX ENGG. CO. Purchase Group: 101 Material Mgmt

Attachments


Doc. Type:  File name:

OBJECT ID	GUI ID	DATE	TYPE

Service Order - Line Items

Item	Material/Service	Quantity	U
1	Cal/Stat/Survey Maint by Exte...	1.000	A

Services for Item: 1 Cal/Stat/Survey Maint by External Vendor

Line	Service No	Description	Text	Input Measurements	BOQ
10	8300000085	Two Coats - Oil Bound Distemper		Input Measurements	3.00

Workflow Released for Approval

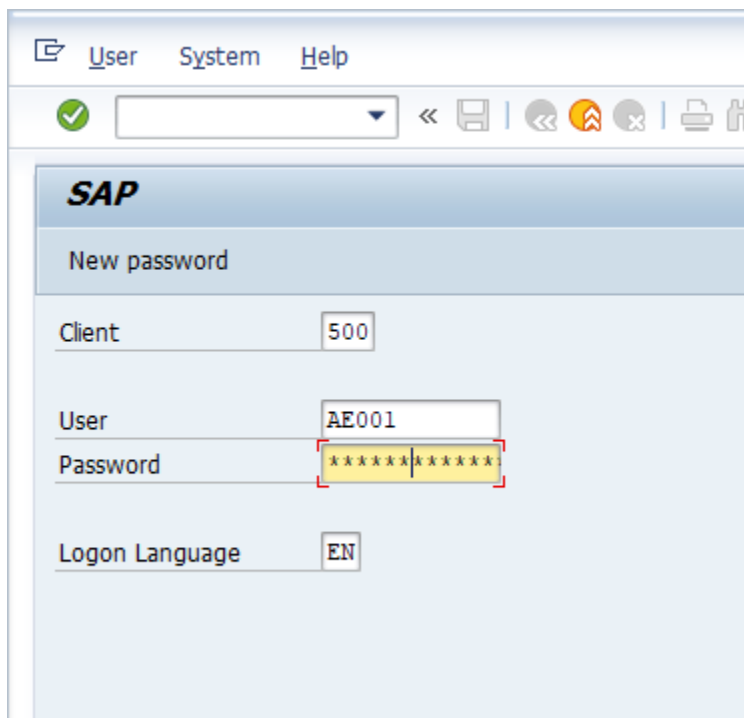
SAP | MP006



## SAP User Manual for Calibration/Statutory/Survey Maintenance

### Approve JMS Sheet

Login as Approver 1 (Assistant Engineer) in SAP System.



The screenshot shows the SAP login interface. At the top, there is a menu bar with 'User', 'System', and 'Help'. Below the menu bar is a toolbar with a green checkmark, a dropdown arrow, and several icons. The main area is titled 'SAP' and contains the following fields:

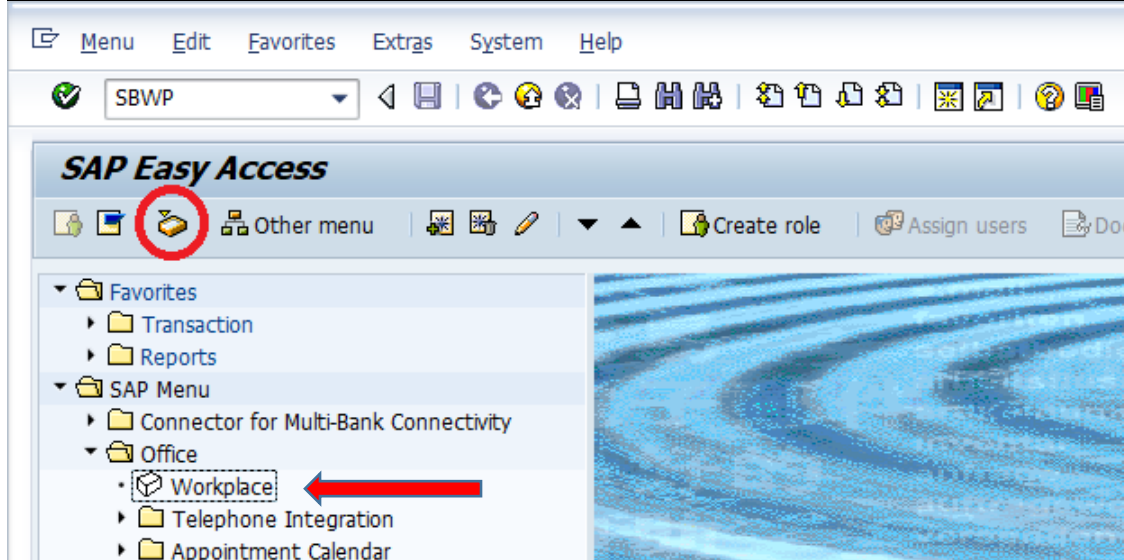
- New password
- Client: 500
- User: AE001
- Password: \*\*\*\*\*
- Logon Language: EN

## SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “  “ SAP Business Workspace Button.

Enter Transaction Code SBWP in command bar (or) Follow the below navigation path.

Transaction Code	SBWP
Menu Path	Easy Access → SAP Menu → Office → Workplace





## SAP User Manual for Calibration/Statutory/Survey Maintenance

Expand “Inbox” button, under workflow “Please Approve JMS 110000012 “message will appear

The screenshot displays the SAP workflow interface. On the left, a navigation pane shows the 'Inbox' expanded, with 'Workflow 29' selected. The main area shows a table of workflow items:

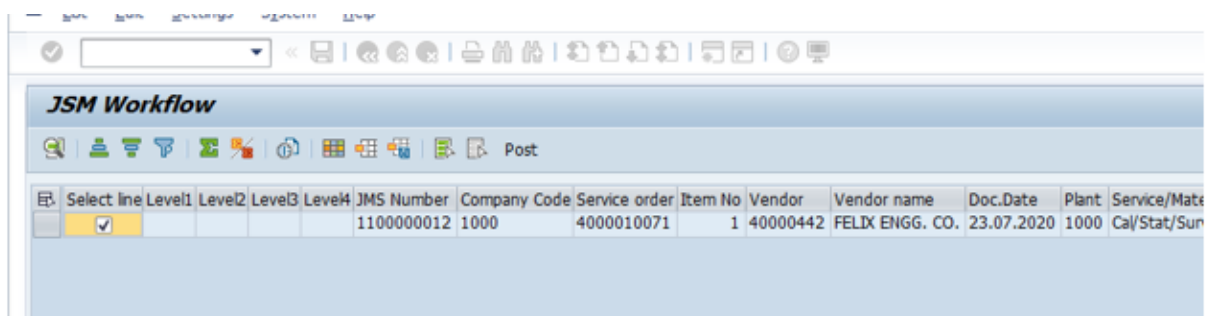
Ex.	Title	Status	Work Item ID	Creation Da	Creation	P. At.	Co.	W.	Dynamic co
1	Please approve the JMS 110000012	Open	414966	23.07.2020	13:08:31	5			
2	Please approve the Purchase Order 4000010071	Open	415459	23.07.2020	13:04:49	5			
3	Please approve the Purchase Order 4000010064	Open	414818	22.07.2020	11:52:04	5			
4	Please approve the Purchase Requisition 2001000963	Open	415320	20.07.2020	02:34:58	5			
5	Please approve the Purchase Requisition 2001000963	Open	414579	20.07.2020	02:33:46	5			
6	Please approve the Purchase Requisition 2001000962	Open	414487	19.07.2020	15:13:42	5			
7	Please approve the Purchase Requisition 2001000962	Open	414486	19.07.2020	15:13:02	5			
8	Please approve the Purchase Requisition 2001000961	Open	415262	19.07.2020	15:10:39	5			
9	Please approve the Purchase Requisition 2001000961	Open	415261	19.07.2020	15:10:16	5			
10	Please approve the Purchase Requisition 2001000959	Open	415260	19.07.2020	15:10:03	5			
11	Please approve the Purchase Requisition 2001000959	Open	414485	19.07.2020	15:07:07	5			
12	Please approve the Purchase Requisition 2001000959	Open	414484	19.07.2020	15:06:38	5			
13	Please approve the Purchase Requisition 2001000959	Open	415258	19.07.2020	15:05:51	5			

Below the table, the selected workflow item is expanded to show a task description: "Please approve the JMS 110000012". The description area contains instructions: "Select one of the available decision options. This completes the processing of this step. Before you make a decision, you can display the". The objects and attachments area is empty, showing "No attachments or objects exist".

## SAP User Manual for Calibration/Statutory/Survey Maintenance

System will open the JMS document for line item wise approval.

Select the line item & Click on “ **Post** ” button.



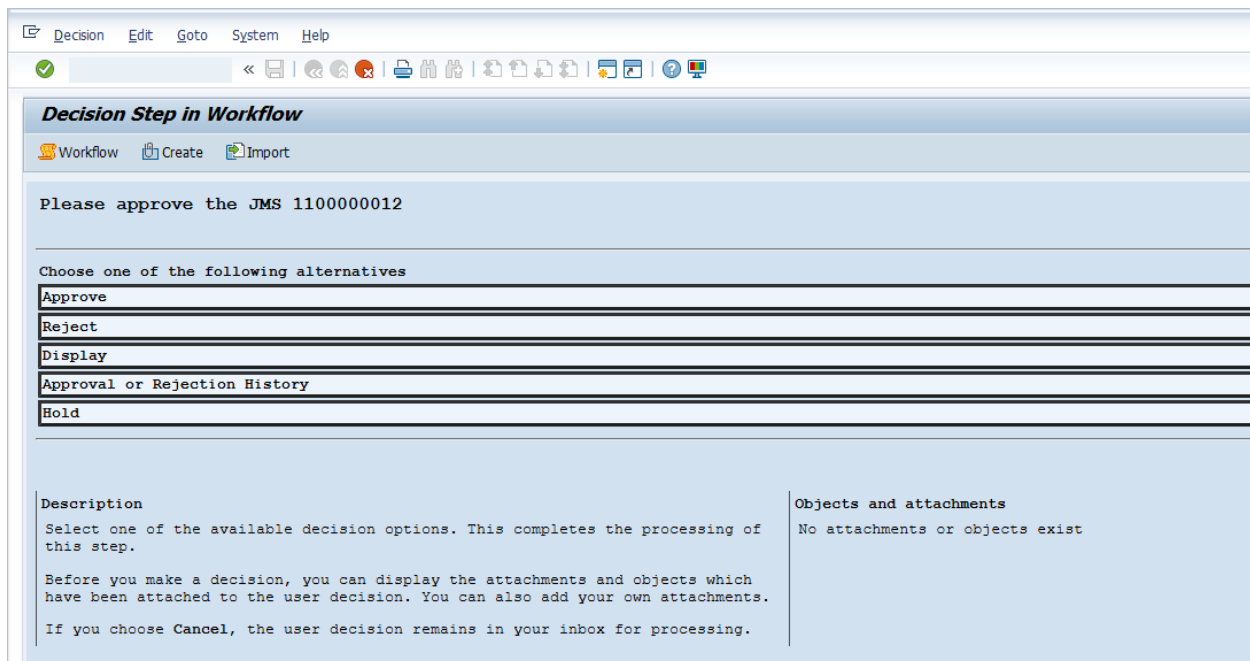
Click on “  ” icon to confirm the selected line items.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “Approve” Button to approve the Measurement Sheet.



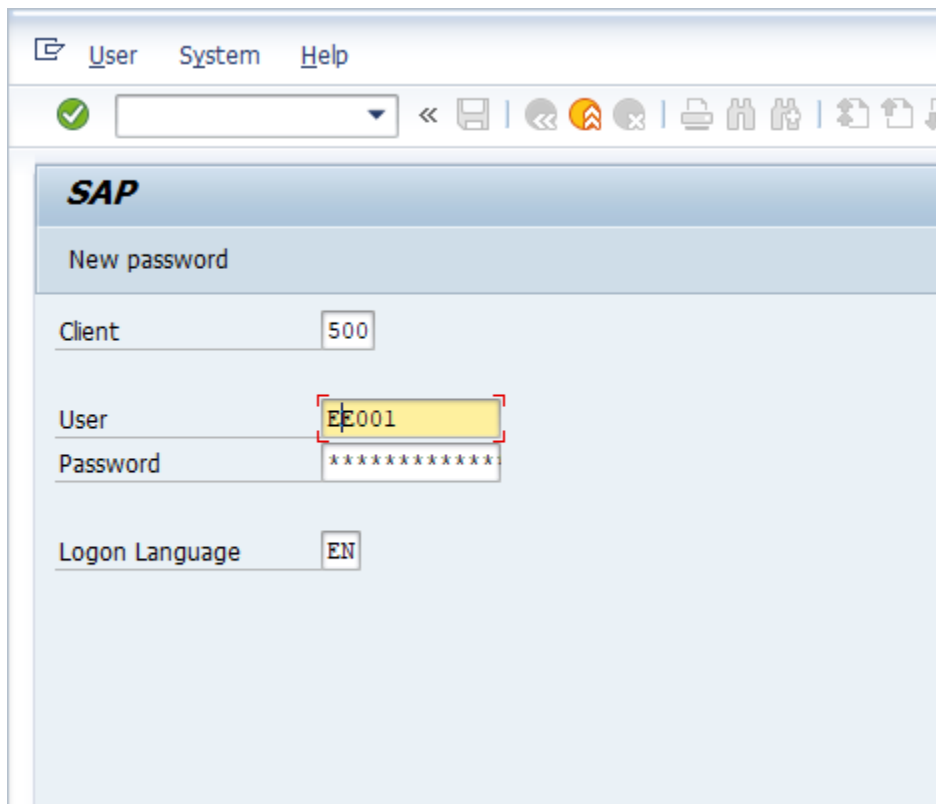
Measurement Sheet will be approved with level 1.

Measurement Sheet Approval Request notification is forwarded to Approver 2.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Login as Approver 2 (Executive Engineer) in SAP System.



The screenshot shows the SAP login interface. At the top, there is a menu bar with 'User', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main content area is titled 'SAP' and contains a 'New password' section. Below this, there are four input fields: 'Client' with the value '500', 'User' with the value 'EE001' (highlighted with a red box), 'Password' with a masked value '\*\*\*\*\*', and 'Logon Language' with the value 'EN'.

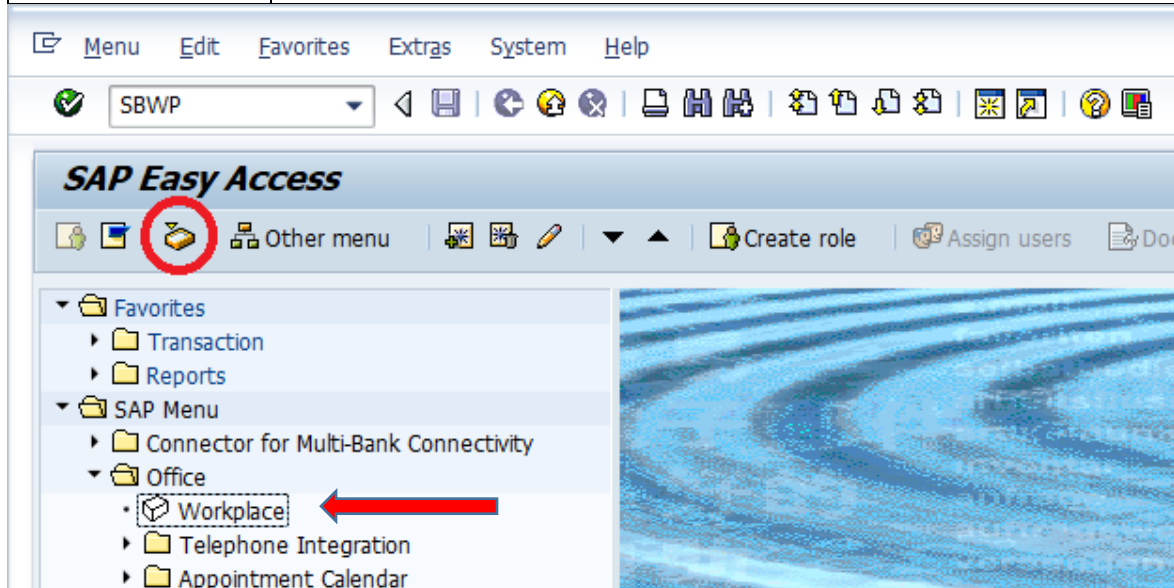


## SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “  “ SAP Business Workspace Button.

Enter Transaction Code SBWP in command bar (or) Follow the below navigation path.

Transaction Code	SBWP
Menu Path	Easy Access → SAP Menu → Office → Workplace





## SAP User Manual for Calibration/Statutory/Survey Maintenance

Expand "Inbox" button, under workflow "Please Approve JMS 110000012 "message will appear

The screenshot shows the SAP inbox interface. On the left, the 'Inbox' folder is expanded, showing a list of folders including 'Workflow 29'. The main area displays a table of workflow items. The first item, 'Please approve the JMS 110000012', is highlighted in yellow. Below the table, the details for this workflow item are shown, including a description and a 'Please approve the JMS 110000012' message.

Ex	Title	Status	Work Item ID	Creation Da	Creation P	At	Co	W	Dynamic cl
	Please approve the JMS 110000012		414966	23.07.2020	13:08:31	5			
	Please approve the Purchase Order 4000010071		415659	23.07.2020	13:04:49	5			
	Please approve the Purchase Order 4000010064		414818	22.07.2020	11:52:04	5			
	Please approve the Purchase Requisition 2001000963		415320	20.07.2020	02:34:58	5			
	Please approve the Purchase Requisition 2001000963		414579	20.07.2020	02:33:46	5			
	Please approve the Purchase Requisition 2001000962		414487	19.07.2020	15:13:42	5			
	Please approve the Purchase Requisition 2001000962		414486	19.07.2020	15:13:02	5			
	Please approve the Purchase Requisition 2001000961		415262	19.07.2020	15:10:39	5			
	Please approve the Purchase Requisition 2001000961		415261	19.07.2020	15:10:16	5			
	Please approve the Purchase Requisition 2001000959		415260	19.07.2020	15:10:03	5			
	Please approve the Purchase Requisition 2001000959		414485	19.07.2020	15:07:07	5			
	Please approve the Purchase Requisition 2001000959		414484	19.07.2020	15:06:38	5			
	Please approve the Purchase Requisition 2001000959		415258	19.07.2020	15:05:51	5			

Please approve the JMS 110000012

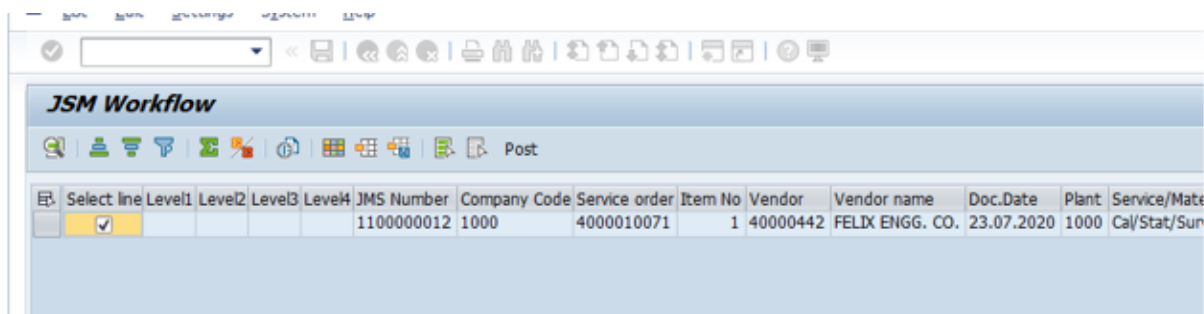
Description  
Select one of the available decision options. This completes the processing of this step.  
Before you make a decision, you can display the

Objects and attachments  
No attachments or objects exist

Tip & tricks: Resubmit Work Item

## SAP User Manual for Calibration/Statutory/Survey Maintenance

System will open the JMS document for line item wise approval.  
Select the line item & Click on “ Post ” button.



Click on “  ” icon to confirm the selected line items.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “Approve” Button to approve the Measurement Sheet.

The screenshot shows the SAP 'Decision Step in Workflow' interface. At the top, there is a menu bar with 'Decision', 'Edit', 'Goto', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main content area has a title bar 'Decision Step in Workflow' and sub-headers 'Workflow', 'Create', and 'Import'. The primary instruction is 'Please approve the JMS 110000012'. Below this, a section titled 'Choose one of the following alternatives' contains a list of buttons: 'Approve', 'Reject', 'Display', 'Approval or Rejection History', and 'Hold'. At the bottom, there are two columns of text: 'Description' and 'Objects and attachments'. The 'Description' text reads: 'Select one of the available decision options. This completes the processing of this step. Before you make a decision, you can display the attachments and objects which have been attached to the user decision. You can also add your own attachments. If you choose Cancel, the user decision remains in your inbox for processing.' The 'Objects and attachments' text reads: 'No attachments or objects exist'.

Measurement Sheet will be approved with level 2.

Measurement Sheet Approval Request notification is forwarded to Approver 3.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Login as **Approver 3** (Dy CME) in SAP System.

The screenshot shows the SAP login interface. At the top, there is a menu bar with 'User', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main content area is titled 'SAP' and contains the following fields:

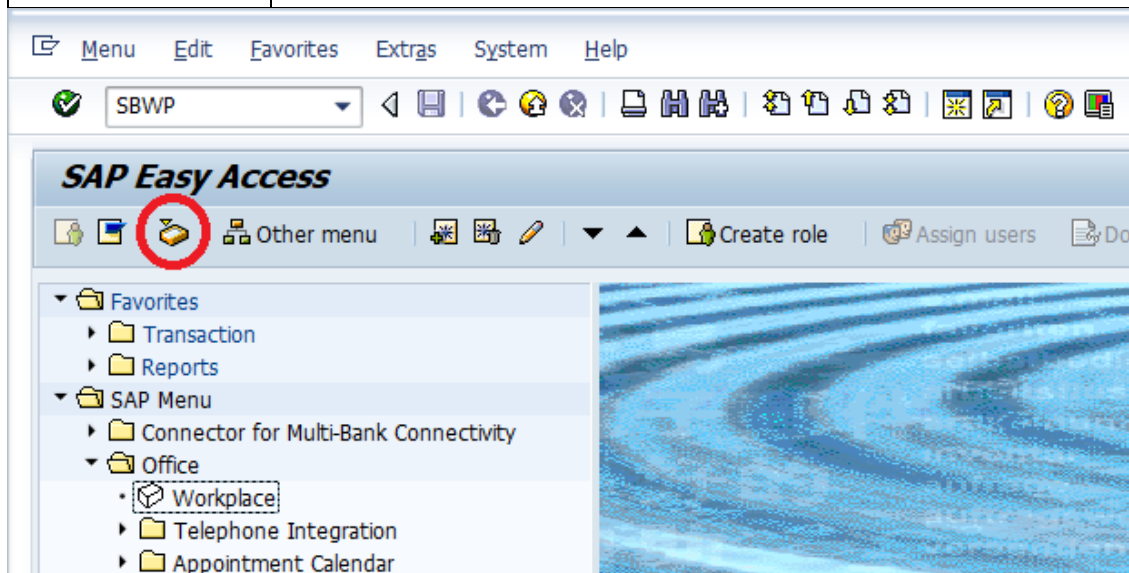
- New password**: A text input field.
- Client**: A text input field containing '500'.
- User**: A text input field containing 'DYCME001'.
- Password**: A text input field containing '\*\*\*\*\*'.
- Logon Language**: A text input field containing 'EN'.

## SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “” **SAP Business Workspace** Button.

Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.

Transaction Code	SBWP
Menu Path	Easy Access → SAP Menu → Office → Workplace





## SAP User Manual for Calibration/Statutory/Survey Maintenance

Expand “Inbox” button, under workflow “Please Approve JMS 1100000012 “message will appear

The screenshot displays the SAP interface. On the left, the 'Inbox' folder is expanded, showing a message titled 'Workflow 29'. The main area shows a table of workflow items:

Ex.	Title	Status	Work Item ID	Creation Da.	Creation	P. At.	Co.	W.	Dynamic co
	Please approve the JMS 1100000012		414966	23.07.2020	13:08:31	5			
	Please approve the Purchase Order 4000010071		415659	23.07.2020	13:04:49	5			
	Please approve the Purchase Order 4000010064		414818	22.07.2020	11:52:04	5			
	Please approve the Purchase Requisition 2001000963		415320	20.07.2020	02:34:58	5			
	Please approve the Purchase Requisition 2001000963		414579	20.07.2020	02:33:46	5			
	Please approve the Purchase Requisition 2001000962		414487	19.07.2020	15:13:42	5			
	Please approve the Purchase Requisition 2001000962		414486	19.07.2020	15:13:02	5			
	Please approve the Purchase Requisition 2001000961		415262	19.07.2020	15:10:39	5			
	Please approve the Purchase Requisition 2001000961		415261	19.07.2020	15:10:16	5			
	Please approve the Purchase Requisition 2001000959		415260	19.07.2020	15:10:03	5			
	Please approve the Purchase Requisition 2001000959		414485	19.07.2020	15:07:07	5			
	Please approve the Purchase Requisition 2001000959		414484	19.07.2020	15:06:38	5			
	Please approve the Purchase Requisition 2001000959		415258	19.07.2020	15:05:51	5			

Below the table, the message details for 'Please approve the JMS 1100000012' are shown:

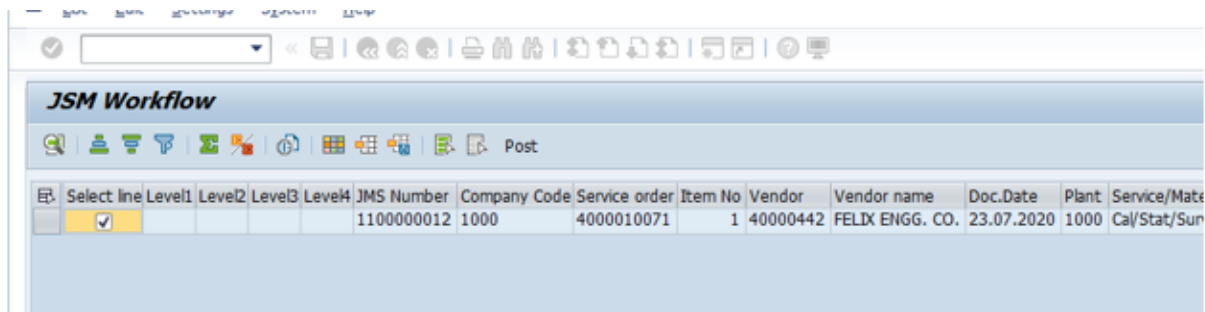
**Description**  
Select one of the available decision options. This completes the processing of this step.  
Before you make a decision, you can display the

**Objects and attachments**  
No attachments or objects exist



## SAP User Manual for Calibration/Statutory/Survey Maintenance

System will open the JMS document for line item wise approval.  
Select the line item & Click on “ Post ” button.



Click on “  ” icon to confirm the selected line items.





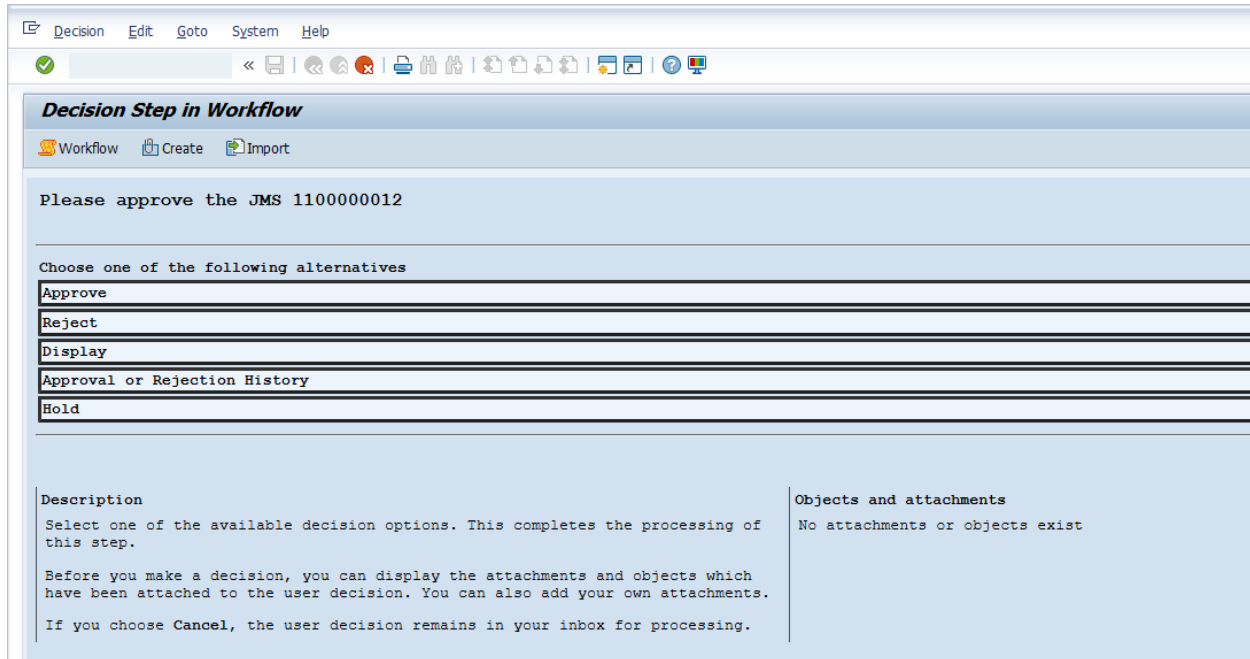
## SAP User Manual for Calibration/Statutory/Survey Maintenance



Click on “Approve” Button to approve the Measurement Sheet.



## SAP User Manual for Calibration/Statutory/Survey Maintenance



Measurement Sheet will be approved with level 3.

Measurement Sheet Approval Request notification is forwarded to Approver 4.

Login as **Approver 4** (CME) in SAP System.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

The screenshot shows the SAP login interface. At the top, there is a menu bar with 'User', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main content area is titled 'SAP' and contains the following fields:

New password	
Client	500
User	CME001
Password	***** *****
Logon Language	EN

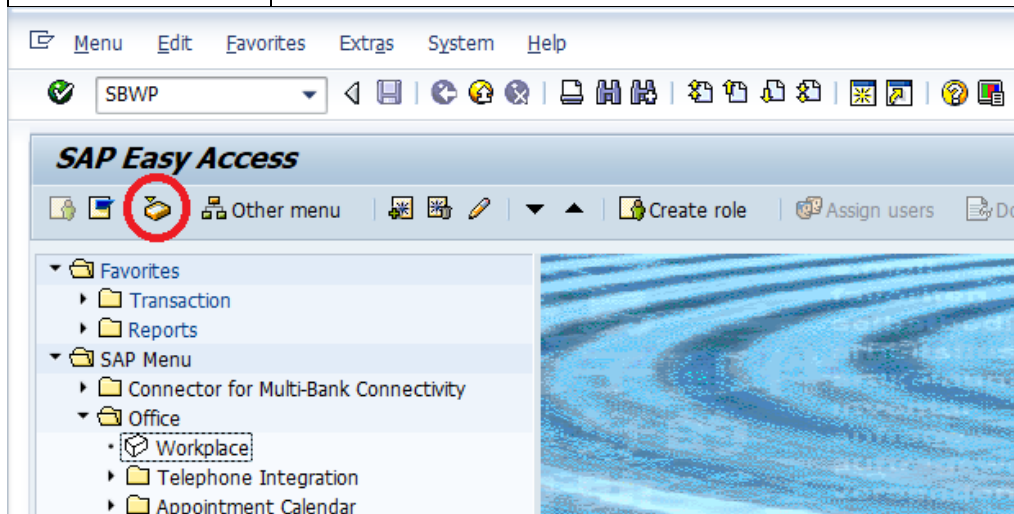
A red arrow points to the Client field.

## SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “” **SAP Business Workspace** Button.

Enter Transaction Code **SBWP** in command bar (or) Follow the below navigation path.

Transaction Code	SBWP
Menu Path	Easy Access → SAP Menu → Office → Workplace





## SAP User Manual for Calibration/Statutory/Survey Maintenance

Expand “Inbox” button, under workflow “Please Approve JMS 110000012 “message will appear

The screenshot shows the SAP Workflow 29 interface. On the left, a navigation pane lists folders like 'Inbox', 'Unread Documents', and 'Outbox'. The main area displays a table of workflow items. The first item is selected, and its details are shown below.

Ex.	Title	Status	Work Item ID	Creation Da	Creation	P. At.	Co.	W.	Dynamic co
	Please approve the JMS 110000012		414966	23.07.2020	13:08:31	5			
	Please approve the Purchase Order 4000010071		415659	23.07.2020	13:04:49	5			
	Please approve the Purchase Order 4000010064		414818	22.07.2020	11:52:04	5			
	Please approve the Purchase Requisition 2001000963		415320	20.07.2020	02:34:58	5			
	Please approve the Purchase Requisition 2001000963		414579	20.07.2020	02:33:46	5			
	Please approve the Purchase Requisition 2001000962		414487	19.07.2020	15:13:42	5			
	Please approve the Purchase Requisition 2001000962		414486	19.07.2020	15:13:02	5			
	Please approve the Purchase Requisition 2001000961		415262	19.07.2020	15:10:39	5			
	Please approve the Purchase Requisition 2001000961		415261	19.07.2020	15:10:16	5			
	Please approve the Purchase Requisition 2001000959		415260	19.07.2020	15:10:03	5			
	Please approve the Purchase Requisition 2001000959		414485	19.07.2020	15:07:07	5			
	Please approve the Purchase Requisition 2001000959		414484	19.07.2020	15:06:38	5			
	Please approve the Purchase Requisition 2001000959		415258	19.07.2020	15:05:51	5			

**Please approve the JMS 110000012**

**Description**  
Select one of the available decision options. This completes the processing of this step.  
Before you make a decision, you can display the

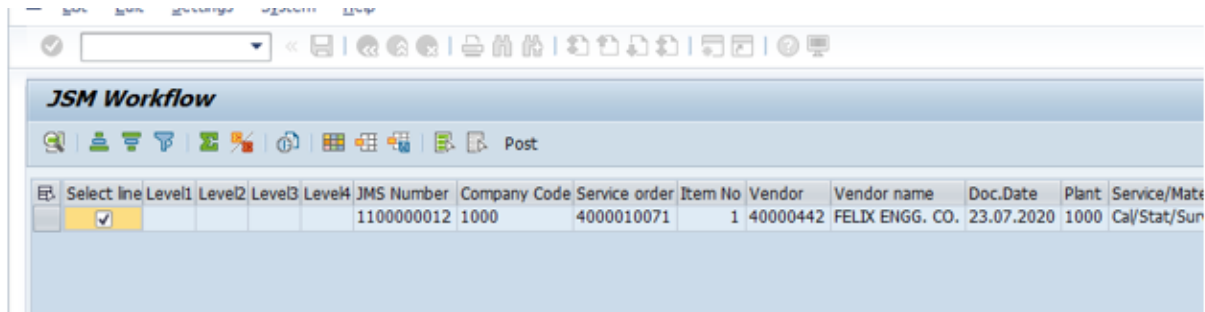
**Objects and attachments**  
No attachments or objects exist

Tip & tricks: Resubmit Work Item

Activate Windows

## SAP User Manual for Calibration/Statutory/Survey Maintenance

System will open the JMS document for line item wise approval.  
Select the line item & Click on “ Post ” button.



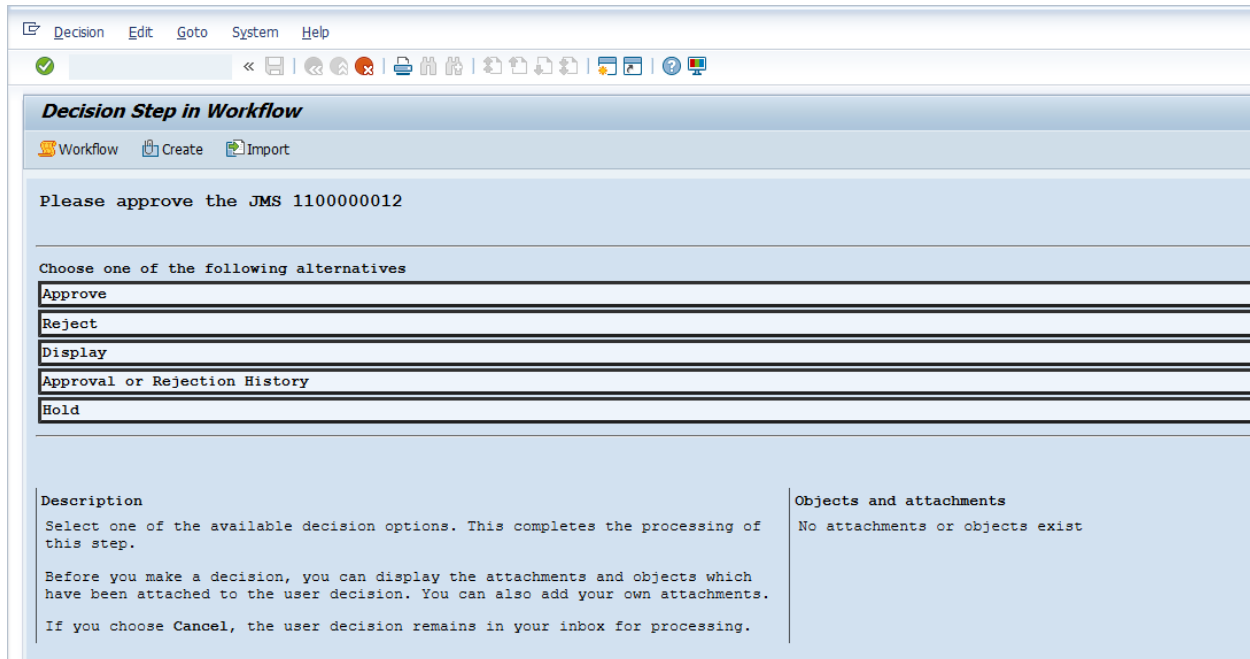
Click on “  ” icon to confirm the selected line items.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “Approve” Button to approve the Measurement Sheet.



JMS will be approved with level 4.



# SAP User Manual for Calibration/Statutory/Survey Maintenance

Once the JMS is approved by all 4 level approvers, a notification is triggered to initiator stating “JMS 110000012 is approved”

The screenshot shows the SAP Business Workplace interface for user MP00611268. The left sidebar displays a folder tree with 'Unread Documents 14' selected. The main area shows a table of unread documents:

Me.	Ty.	Title	At.	Author	Date recei.	Co.	Re.	Recip.
✉	📄	JMS 1100000012 is approved.		SAP_WFRT	23.07.2020			1
✉	📄	JMS 1100000012 is approved.		SAP_WFRT	23.07.2020			1
✉	📄	JMS 1100000012 is approved.		SAP_WFRT	23.07.2020			1
✉	📄	JMS 1100000012 is approved.		SAP_WFRT	23.07.2020			1
✉	📄	JMS 1100000012 is approved.		SAP_WFRT	23.07.2020			1
✉	📄	Purchase Order 4000010071 is...		SAP_WFRT	23.07.2020			1
✉	📄	Purchase Order 4000010071 is...		SAP_WFRT	23.07.2020			1
✉	📄	Purchase Order 4000010071 is...		SAP_WFRT	23.07.2020			1
✉	📄	Purchase Order 4000010071 is...		SAP_WFRT	23.07.2020			1
✉	📄	JMS 1100000010 is approved.		SAP_WFRT	22.07.2020			1
✉	📄	Purchase Order 4000010064 is...		SAP_WFRT	22.07.2020			1
✉	📄	Purchase Order 4000010064 is...		SAP_WFRT	22.07.2020			1
✉	📄	Purchase Order 4000010064 is...		SAP_WFRT	22.07.2020			1
✉	📄	Purchase Order 4000010064 is...		SAP_WFRT	22.07.2020			1

Below the table, a notification is displayed: **JMS 1100000012 is approved.** The message body begins with "Hello Sir/Madam,"

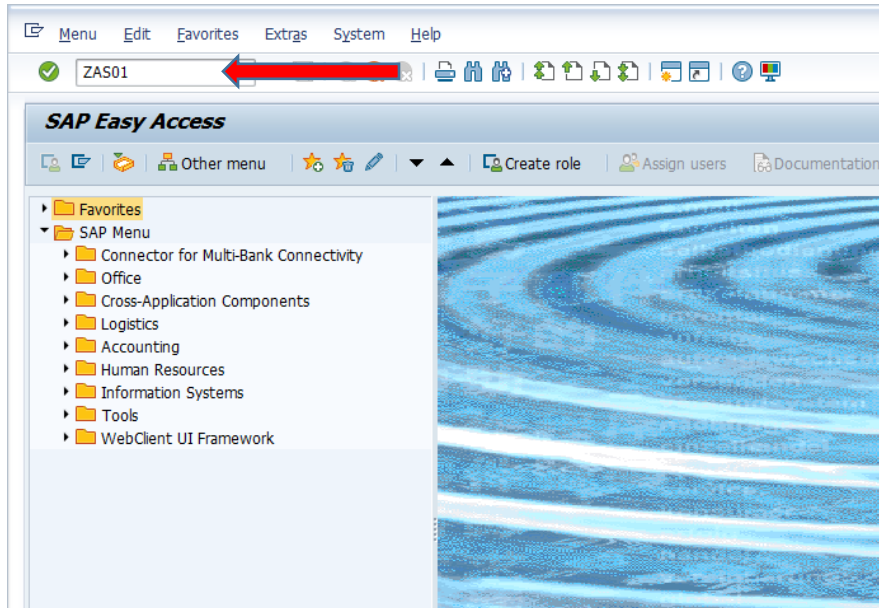




## SAP User Manual for Calibration/Statutory/Survey Maintenance

### Create/ Change Abstract:

Enter Transaction code ZAS01 in Command bar and press Enter





## SAP User Manual for Calibration/Statutory/Survey Maintenance

In Create Abstract Screen, provide below details,

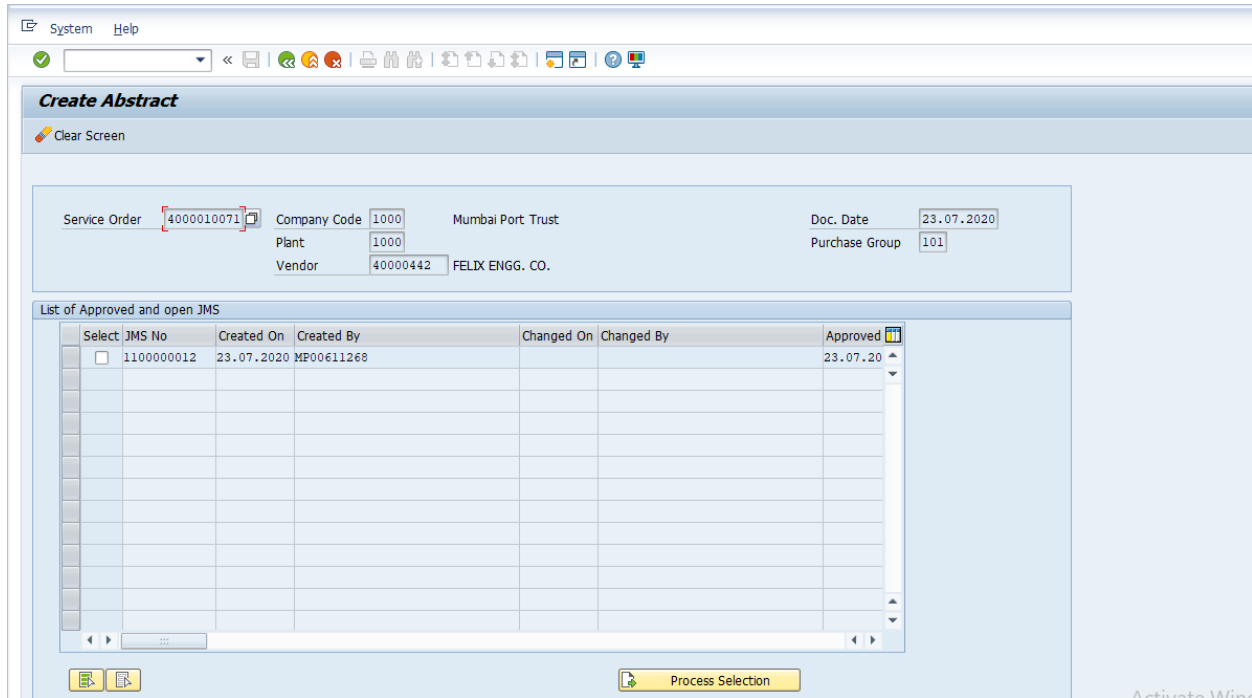
Company Code: 1000

Service PO: 4000010071

The screenshot shows the SAP 'Create Abstract' screen. At the top, there is a menu bar with 'System' and 'Help'. Below it is a toolbar with various icons. The main area is titled 'Create Abstract' and contains a 'Clear Screen' button. The input fields are organized into two sections. The first section contains 'Service Order' (with a yellow highlight), 'Company Code' (with '1000' entered), 'Plant', and 'Vendor'. The second section contains 'Doc. Date' and 'Purchase Group'. Below these fields is a table titled 'List of Approved and open JMS'. The table has columns for 'Select', 'JMS No', 'Created On', 'Created By', 'Changed On', 'Changed By', and 'Approved'. The table is currently empty. At the bottom of the screen, there are two buttons: 'Process Selection' and 'Activate Window'.

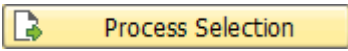


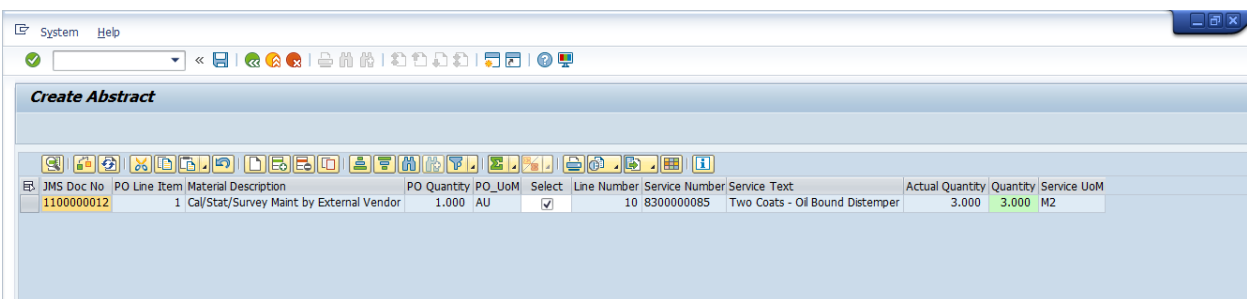
## SAP User Manual for Calibration/Statutory/Survey Maintenance



Press Enter.

System will fetch the details of JMS recorded against Service order and display in Create Abstract screen.

Select the JMS Line Item and Click on “  “ Process Selection Button.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

System will Generate the Abstract Document.

The screenshot shows the SAP 'Create Abstract' dialog box. At the top, there is a title bar 'Create Abstract' and a toolbar with various icons. Below the toolbar is a table with the following data:

JMS Doc No	PO Line Item	Material Description	PO Quantity	PO_UoM	Select	Line Number	Service Number	Service
1100000012	1	Cal/Stat/Survey Maint by External Vendor	1.000	AU	<input checked="" type="checkbox"/>	10	8300000085	Two C

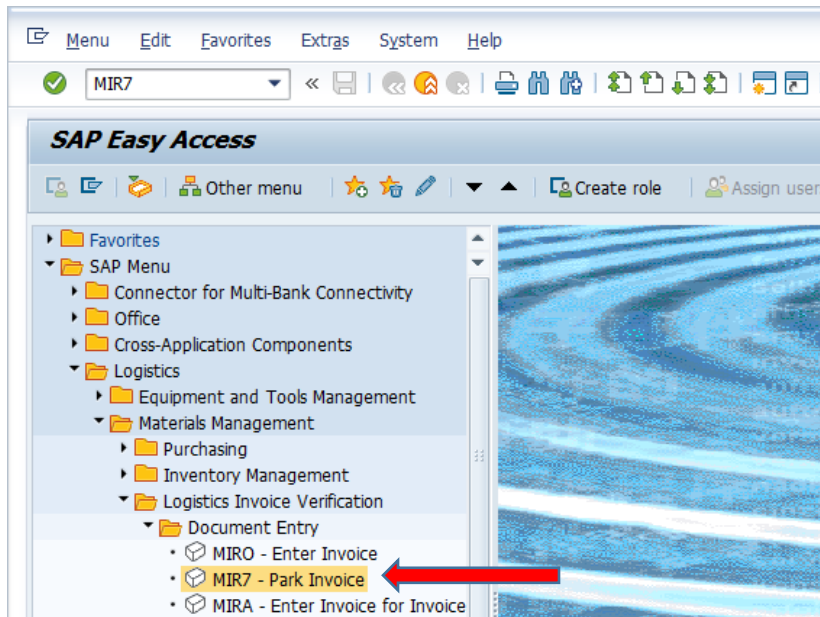
Below the table, there is a 'Details of Abstract created' window. This window has its own toolbar and a table with the following data:


Abstract	PO Line Item
2100000012	1

## SAP User Manual for Calibration/Statutory/Survey Maintenance

### Invoice Verification:

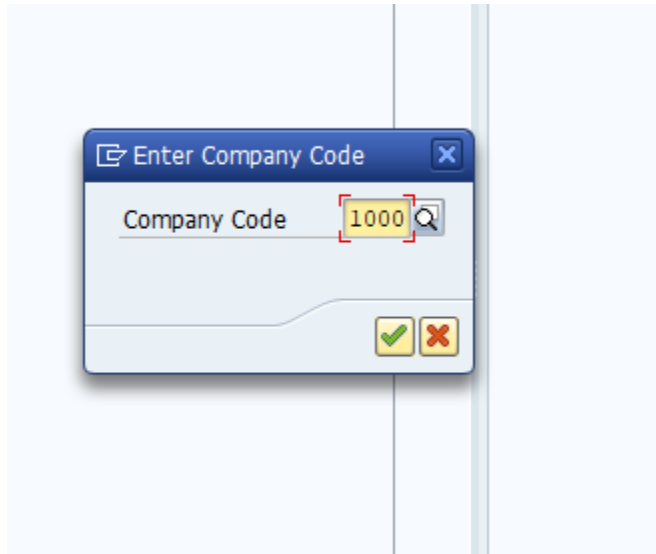
Enter Transaction code MIR7 in command Bar



Enter Company Code: 1000 and click “” Continue icon.



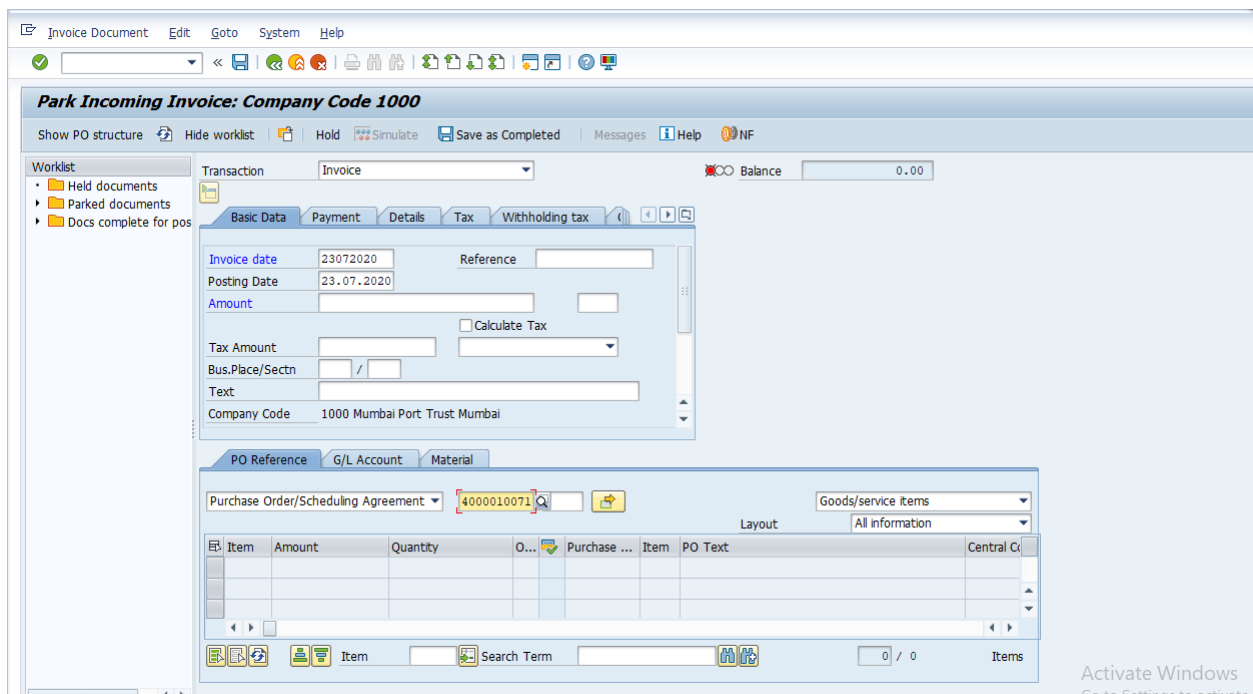
## SAP User Manual for Calibration/Statutory/Survey Maintenance



In Park Incoming Invoice Screen, provide below details;

Invoice Date: 23.07.2020

Purchase order: 4000010071 & Press Enter.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

System will copy details with reference to PO & Display. Select the Tax Code V1 & Select Calculate Tax Checkbox. Provide Base line date: 23.07.2020 in Payment Tab

The screenshot displays the SAP Invoice Document interface for a 'Park Incoming Invoice' with Company Code 1000. The main window is titled 'Invoice Document' and includes a menu bar (Invoice Document, Edit, Goto, System, Help) and a toolbar. The transaction type is 'Invoice' and the balance is 59,850.00 INR.

**Basic Data Tab:**

- Invoice date: 23.07.2020
- Posting Date: 23.07.2020
- Amount: [Empty]
- Calculate Tax:
- Tax Amount: 2,850.00
- Tax Code: V1 (CGST+SGST 5% In...)
- Bus.Plac/Sectn: [Empty]
- Text: [Empty]
- Paymt terms: Due immediately

**Vendor Information (Vendor 0040000442):**

- FELIX ENGG. CO.
- 3 MOTISHAH CROSS LANE
- COZY COTTAGE, 4TH FLOOR, BYCULLA
- 400027 MUMBAI-MUMBAI
- 2865273
- Bank Key: SBIN0000290
- Bank acct: 7234896734
- STATE BANK OF INDIA, WORLI NORTH

**PO Reference / G/L Account / Material Tab:**

- Purchase Order/Scheduling Agreement: 4000010071
- Goods/service items: [Empty]
- Layout: All information

Item	Amount	Quantity	O...	Purchase ...	Item	PO Text	Central Cr
1	57,000.00			4000010071	1	Cal/Stat/Survey Maint by External Vendor	



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “**Calculate Tax Check Box**”, Tax Amount will be calculated as per selected Tax Code and displayed.

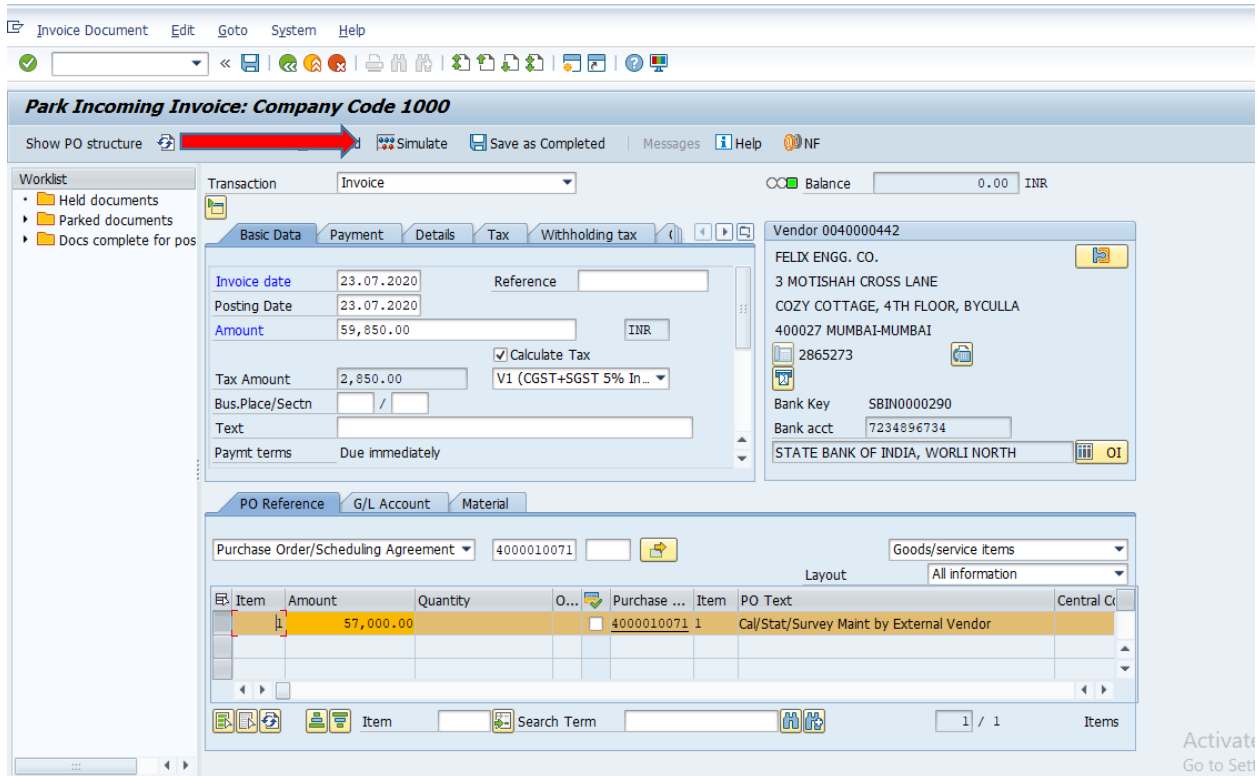
Provide Amount including Tax Amount. Amount: 500.

Click on “  Simulate “ Simulate Button.





## SAP User Manual for Calibration/Statutory/Survey Maintenance

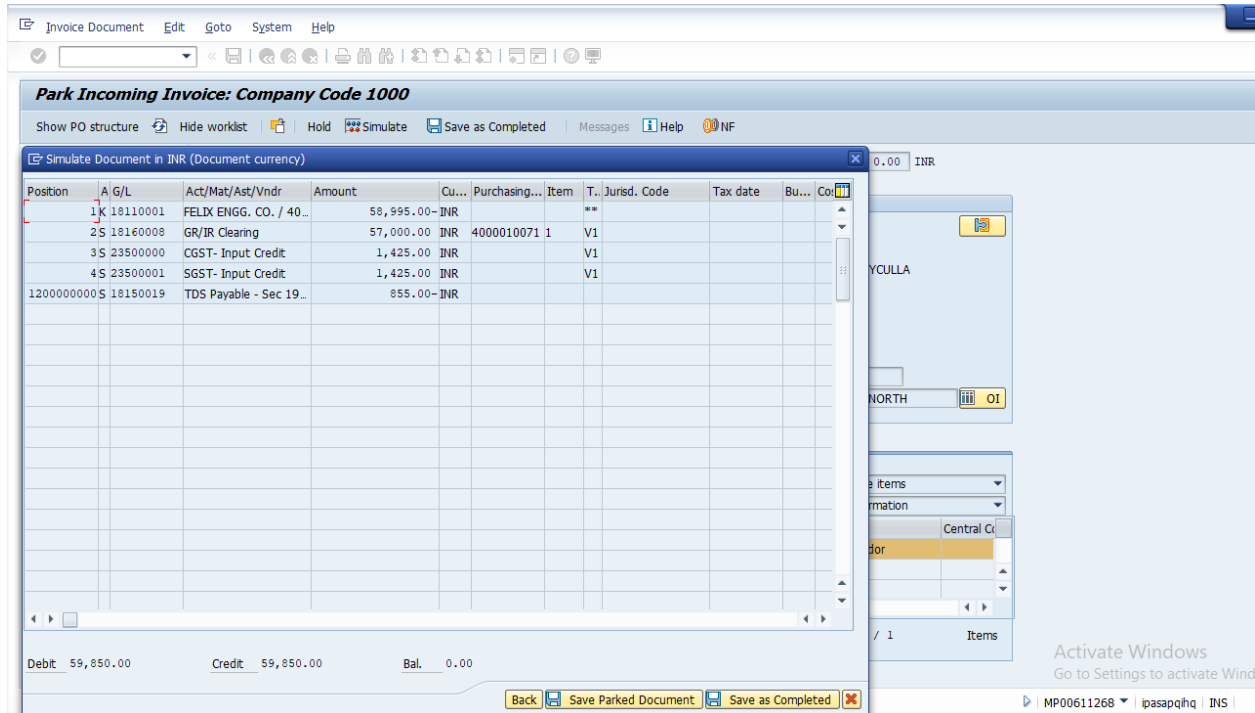


System will display FI Documents posting details.

Click on “  Save as Completed “ Save as Complete Button.



# SAP User Manual for Calibration/Statutory/Survey Maintenance

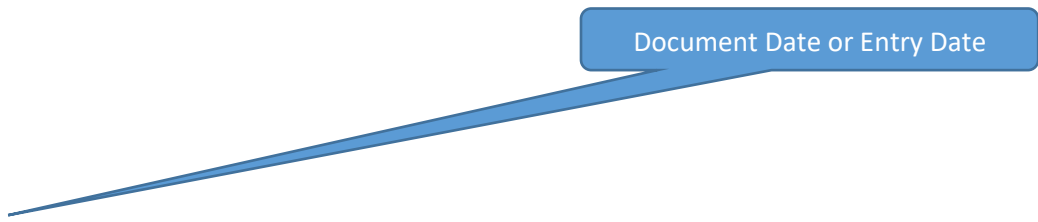


System will park the invoice and displays “ Invoice document 6010000920 has been saved as complete ” message

## FI Process 1 - Vendor Outgoing Payment: Transaction Code F-53

**Step 1.** In the below selection screen enter the following fields to process the payment for the Vendor

- Enter Document Date: 27-07-2020
- Bank Account Details (Rev Outgoing A/c): 23110002
- Vendor Account Number.: 40000442





## SAP User Manual for Calibration/Statutory/Survey Maintenance

**Post Outgoing Payments: Header Data**

Process Open Items

Document Date	27.07.2020	Type	KZ	Company Code	1000
Posting Date	27.07.2020	Period	4	Currency/Rate	INR
Document Number				Translation dte	
Reference				Cross-CC Number	
Doc.Header Text	Calibration Maint			Trading part.BA	
Clearing Text	Calibration Maint				

**Bank data**

Account	23110002	Business Area		
Amount	1			
Amt.in loc.cur.				
Bank Charges		LC Bank Charges		
Value date	27.07.2020	Profit Center		
Text	Calibration Maint		Assignment	

**Open item selection**

Account	40000442
Account Type	K <input type="checkbox"/> Other Accounts
Special G/L Ind	<input type="checkbox"/> <input checked="" type="checkbox"/> Standard OIs
Payt Advice No.	
<input type="checkbox"/> Distribute by Age	
<input type="checkbox"/> Automatic Search	

**Additional selections**

- None
- Amount
- Document Number
- Posting Date
- Dunning Area
- Others

Outgoing Bank Account details

Vendor Account Number

**Step 2.** Enter the **Document Number** and Click on **Process Open Items** to process the payment



## SAP User Manual for Calibration/Statutory/Survey Maintenance

**Post Outgoing Payments Enter selection criteria**

Other selection   Other account   **Process Open Items**

---

Parameters entered

Company Code	1000
Account	40000442
Account Type	K
Special G/L Ind.	<input type="checkbox"/> Standard OIs

---

Document Number

From	To	String	Initial Value
2600000034	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

→ **Step 3.** Enter the Payment Amount to Post the Payment for the Invoice document



## SAP User Manual for Calibration/Statutory/Survey Maintenance

**Post Outgoing Payments Process open items**

Distribute Difference Charge Off Difference Editing Options Cash Disc. Due

Standard Partial Pmt Res.Items WH Tax

Account items 40000442 FELIX ENGG. CO.

Document N...	D..	Document D...	P...	Busi...	Day...	INR Gross	CashDiscount	CDPer.
2600000034	RE	23.07.2020	31		4	58,995.00-		

Processing Status

Number of Items	1	Amount Entered	1.00-
Display from Item	1	Assigned	58,995.00-
Reason Code		Difference Postings	
Display in clearing currency		Not Assigned	58,994.00

▶ **Step 4.** Click on Document overview Enter the Payment Amount to Post the Payment for the Invoice document



## SAP User Manual for Calibration/Statutory/Survey Maintenance

**Step 5.** Click on **Document** Tab → **Simulate**: To Simulate the entered details for validation and Click on **Post** to post the document



### SAP User Manual for Calibration/Statutory/Survey Maintenance

Document Edit Goto Extras Settings Environment System Help

Post Outgoing Payments Display Overview

Display Currency Taxes Reset

Document Date	27.07.2020	Type	KZ	Company Code	1000
Posting Date	27.07.2020	Period	4	Currency	INR
Document Number	INTERNAL	Fiscal Year	2020	Translation dte	27.07.2020
Reference		Cross-CC Number		Trading part.BA	
Doc.Header Text	Calibration Maint				

Items in document currency

PK	BusA	Acct	INR	Amount	Tax amnt
001	50	0023110002 SBI - Rev - Outgoin		58,995.00-	
002	25	0040000442 FELIX ENGG. CO.		58,995.00	

D 58,995.00      C 58,995.00      0.00      \* 2 Line Items

Step 6. Click on save The Vendor Payment document- 2300000023 is Posted successfully

Document 2300000026 was posted in company code 1000



# SAP User Manual for Calibration/Statutory/Survey Maintenance

Step 7. Go to Transaction FB03 or Document Tab - Display → To Display the Payment document Posted

The screenshot shows the SAP 'Display Document: Data Entry View' window. The document number is 2300000026, company code is 1000, and fiscal year is 2020. The document date is 27.07.2020. The currency is INR. The table below shows the line items:

CoCd	Item Key S...	Account	Description	Amount	Curr.	Tx	Cost Center
1000	1 50	23110002	SBI - Rev - Outgoing	58,995.00-	INR		
	2 25	40000442	FELIX ENGG. CO.	58,995.00	INR		

Step 8. Go to Document Tab – Select Print Preview for Document Overview

The screenshot shows the SAP 'Document Overview - Display' window. The document type is KZ (Vendor Payment). The document number is 2300000026, company code is 1000, and fiscal year is 2020. The document date is 27.07.2020. The document currency is INR. The document header text is Calibration Maint. The table below shows the line items:

Itm	PK	Account	Account Short Text	Assignment	Tx	Amount
1	50	23110002	SBI - Rev - Outgoing	20200727		58,995.00-
2	25	40000442	FELIX ENGG. CO.			58,995.00

Step 9: Transaction FBZ5 → Go to Transaction FBZ5 for Printing the Check





## SAP User Manual for Calibration/Statutory/Survey Maintenance

Document Number	2300000026	
Company Code	1000	Mumbai Port Trust
Fiscal Year	2020	

Payment method and form specifications

Payment Method	C
Check Lot Number	1
Alternative Form	
Padding Character	

Output control

Printer for Forms	ZLP01	<input checked="" type="checkbox"/> Print Immediately
Payt Advice Printer		<input type="checkbox"/> Recipient's Language
		<input type="checkbox"/> Currency in ISO code
		<input checked="" type="checkbox"/> Test Printout
		<input type="checkbox"/> Do Not Void Any Checks

Step 10. Click on check and print preview



### SAP User Manual for Calibration/Statutory/Survey Maintenance

Print: [X]

Output Device: ZLP01

Page selection: [ ]

**Spool Request**

Name: SMART [ ] MZ00596723

Title: [ ]

Authorization: [ ]

**Spool Control**

Print Now

Delete After Output

New Spool Request

Close Spool Request

Spool Retention: 8 Day(s)

Storage Mode: 1 Print only

**Number of Copies**

Number: 1

Group (1-1-1,2-2-2,3-3-3,...)

**Cover Page Settings**

SAP cover page: Do not print

Recipient: [ ]

Department: [ ]

Print preview [ ] Print [ ] [X]

**Print Preview of ZLP01 Page 00001 of 00001**

Archive [ ] Print and Archive [ ] [ ] [ ]

A/C Payee	2 7 0 7 2 0 2 0
FELIX ENGG. CO.	
Fifty eight thousand nine hundred ninety five only	
	58,995.00

**Step 11. Transaction ZFI04** → Go to Transaction **ZFI04** – Enter **Company code**, **Current Date** and **Print** to create the Bank file for Vendor payment



## SAP User Manual for Calibration/Statutory/Survey Maintenance

**Text file to bank - Vendor Payment**

Company code: 1000

Current Date: 27.07.2020 to

Print layout

Print:

Output Device: ZLP01

Page selection:

**Spool Request**

Name: SMART MZ00596723

Title:

Authorization:

**Spool Control**

Print Now

Delete After Output

New Spool Request

Close Spool Request

Spool Retention: 8 Day(s)

Storage Mode: 1 Print only

**Number of Copies**

Number: 1

Group (1-1-1,2-2-2,3-3-3,...)

**Cover Page Settings**

SAP cover page: Do not print

Recipient:

Department:

Print preview Print

Bank file created successfully:



# SAP User Manual for Calibration/Statutory/Survey Maintenance

## Print Preview of ZLP01 Page 00001 of 00001

Archive Print and Archive



### MUMBAI PORT TRUST

Finance Department



Mumbai Port Trust  
Port House, S.V. Marg, Ballard Estate  
400001 MUMBAI  
INDIA

To,  
The Branch Manager,  
IDBI Bank Limited,

Sir,

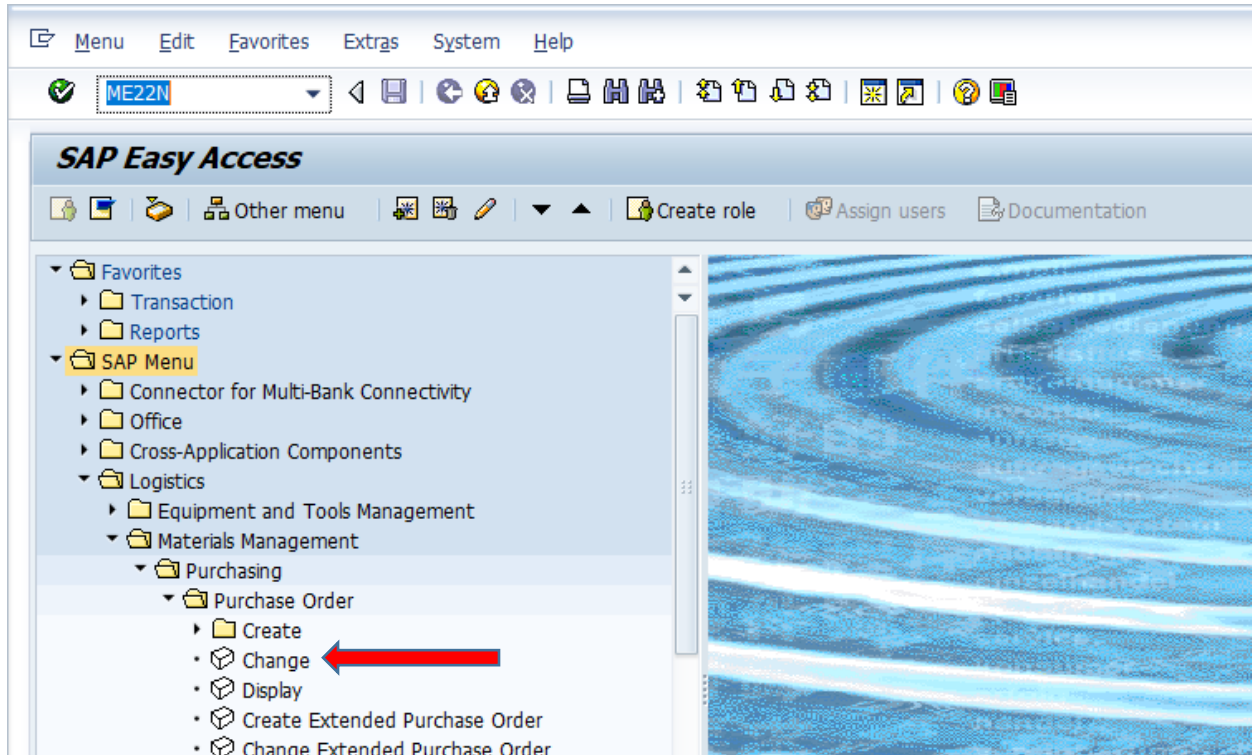
You are requested to make payment through A/c No: 10996685430 for the invoices listed below.

Row#	Party	Account No	IFSC	Amount	Remarks
1	ALEX CHEMICAL & INDUSTRIES	307651100000204	IBKL0000307	2,587.00	2300000024
2	MAHARASHTRA BAMBOO BHANDAR			25,200.00	2300000025
3	FELIX ENGG. CO.	7234896734	SBIN0000290	58,995.00	2300000026
Total Amount:				86,782.00	

Invoice will be parked for approval and same will be updated in the Purchase Order History. Enter Transaction Code ME22N in command bar (or) Follow the below navigation path.

Transaction Code	ME22N
Menu Path	Easy Access → SAP Menu → Office → Workplace

## SAP User Manual for Calibration/Statutory/Survey Maintenance



Click on Other document and Enter Purchase Order: 4202000040.

Click on Other Document Button.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

STD Purchase Order 4000010071 Created by PI\_USER

Document Overview On | Print Preview | Messages | Personal Setting

STD Purchase Order 4000010071 Vendor 40000442 FELIX ENGG. CO. Doc. Date 23.07.2020

S...	Itm	A	I	Material	Short Text	PO Quantity	O...	C	Delv. Date	Net Price	Curr...	Per	O...	Matl Group	Pint	Stor. Li
					Cal/Stat/Survey Maint by...		1	AU	31.12.2021	57,000.00	INR	1	AU	Constructio...	Mumbai Port Trust	

Item: [ 1 ] Cal/Stat/Survey Maint by External Vendor

Sh. Text	MvT	Material	Document	Item	Posting Date	Quantity	Delivery cost quantity	OU	Amt.in Loc.	Cur.	L.cur	Qty in OPUn	DelCostQty (OPUn)	Order Price Unit	Amount	C
WE	101	5101000054			1 23.07.2020				57,000.00	INR					57,000.00	II
<b>Tr./Ev. Goods receipt</b>																
Lerf		1000000239			23.07.2020				57,000.00	INR					57,000.00	II
<b>Tr./Ev. Service entry</b>																
VRe		6010000020			1 23.07.2020				57,000.00	INR					57,000.00	II
<b>Tr./Ev. Parked invoice</b>																

### Parked Invoice Approval:

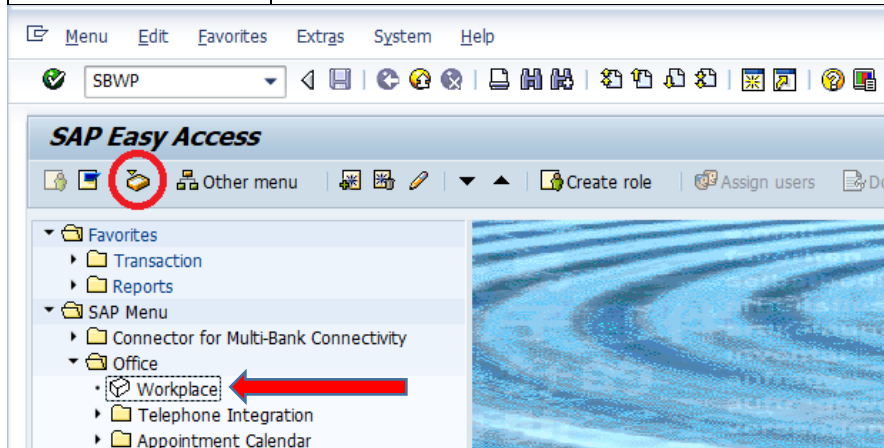
Login as Approver in SAP System.

## SAP User Manual for Calibration/Statutory/Survey Maintenance

Click on “  ” SAP Business Workspace Button.

Enter Transaction Code SBWP in command bar (or) Follow the below navigation path.

Transaction Code	SBWP
Menu Path	Easy Access → SAP Menu → Office → Workplace



Expand “Inbox” button, under workflow “Complete parked invoice 601000020 2020”message will appear.

Double Click on the “Complete parked invoice 601000020 2020 ”message.

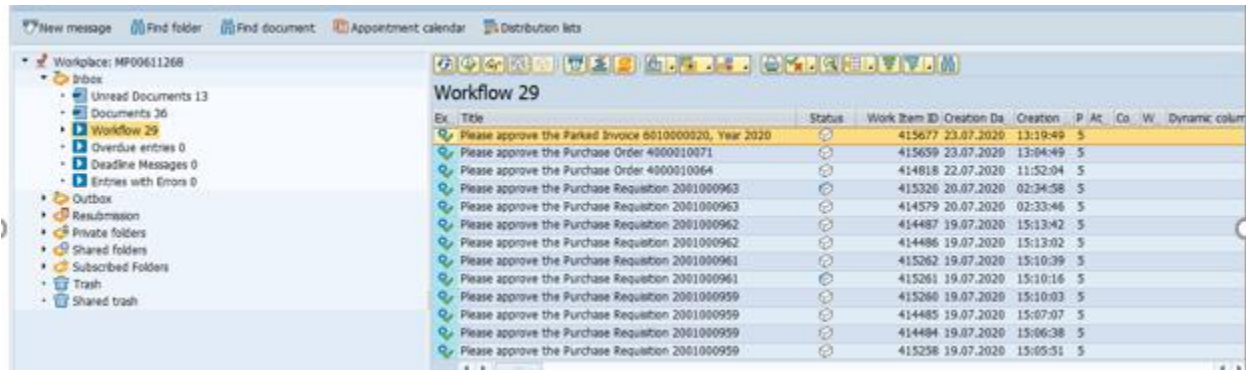
Confidential Document

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## SAP User Manual for Calibration/Statutory/Survey Maintenance



It will open the Decision Step in Workflow Screen.

Click on Approve Button.





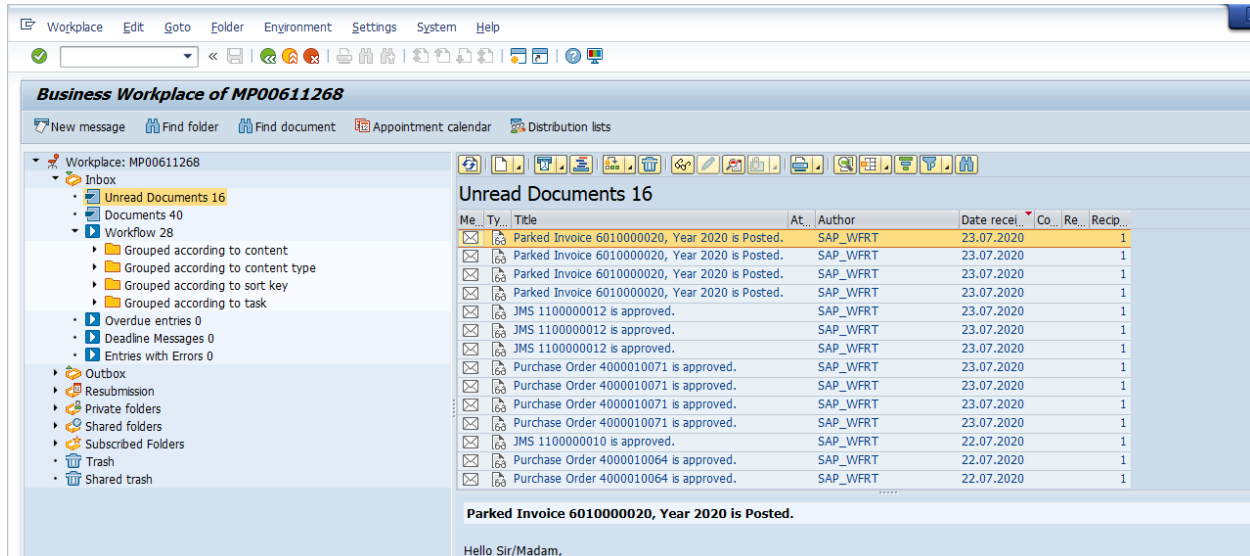
## SAP User Manual for Calibration/Statutory/Survey Maintenance



Invoice Document will be approved and Posted for Vendor Payment.

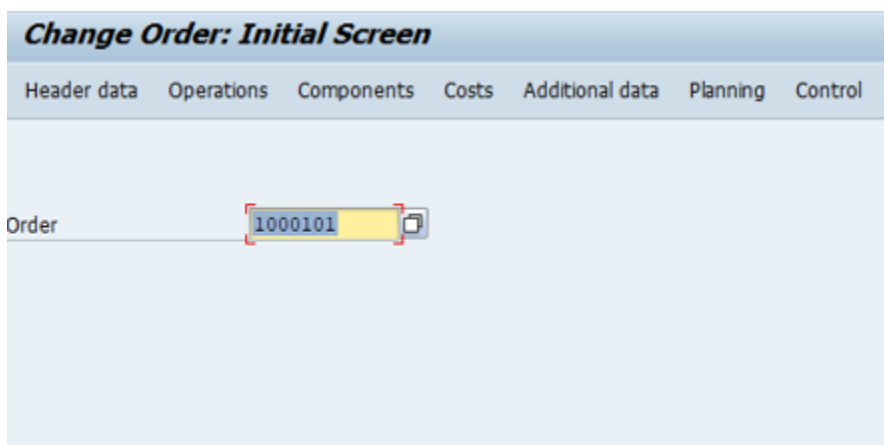


# SAP User Manual for Calibration/Statutory/Survey Maintenance



## Technical Completion of Order

Go to Transaction Code IW32 and enter the preventive Maintenance order No





## SAP User Manual for Calibration/Statutory/Survey Maintenance

And Click Complete Technically icon as shown



Op...	SOp	Work Ctr	Plant	Co...	StTextK	S...	Operation short text	L...	Actual work	Work	Un	N...	Dur.	Un	C.Key	Act
0010		PM_CME	1000	PM01			Cal/Stat/Survey Maint		0		H			H	Calculate du...	
0020		PM_CME	1000	PM03			Cal/Stat/Survey Maint by External Vendor		0	0	H			H	Calculate du...	
0030		PM_CME	1000	PM03			Cal/Stat/Survey Maint by External Vendor		0	0	H			H	Calculate du...	
0040		PM_CME	1000	PM01					0		H			H		
0050		PM_CME	1000	PM01					0		H			H		
0060		PM_CME	1000	PM01					0		H			H		
0070		PM_CME	1000	PM01					0		H			H		
0080		PM_CME	1000	PM01					0		H			H		
0090		PM_CME	1000	PM01					0		H			H		
0100		PM_CME	1000	PM01					0		H			H		
0110		PM_CME	1000	PM01					0		H			H		
0120		PM_CME	1000	PM01					0		H			H		
0130		PM_CME	1000	PM01					0		H			H		
0140		PM_CME	1000	PM01					0		H			H		

Select the Date and Time of Technically Closure of Order



# SAP User Manual for Calibration/Statutory/Survey Maintenance

The screenshot displays the SAP S/4HANA user interface for the transaction 'Change Calibration/Statutory/Survey Maintenance 1000101: Operation Ove'. The main window shows the 'Complete' dialog box with the following fields:

- Reference Date: 23.07.2020
- Reference time: 16:53:39
- Complete notifctns
- Buttons: Cancel

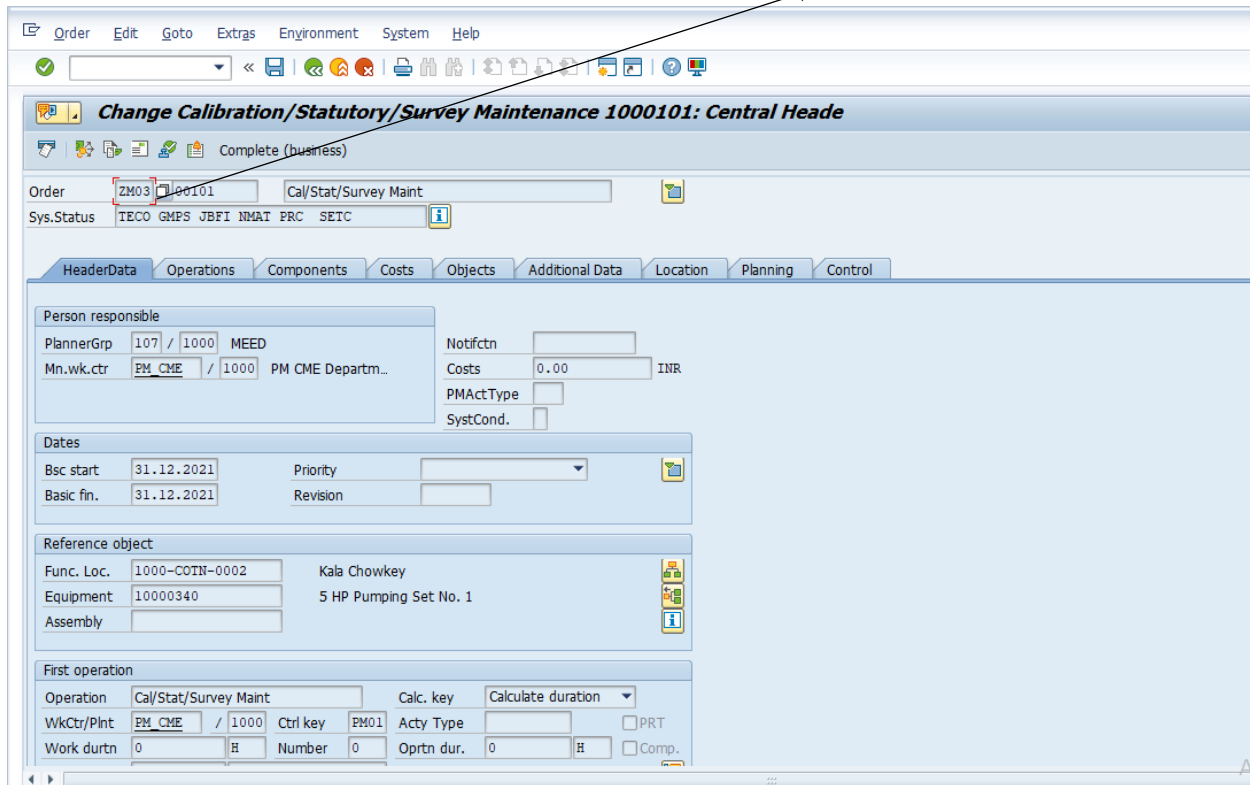
The background table, titled 'Catalog', contains the following data:

...	Actual work	Work	Un	N...	Dur.	Un	C.Key	ActTyp	Recipient	Unb...
	0		H			H	Calculate du...			
	0	0	H			H	Calculate du...			
	0	0	H			H	Calculate du...			
	0		H			H				
	0		H			H				
	0		H			H				
	0		H			H				
	0		H			H				
	0		H			H				
	0		H			H				
	0		H			H				
	0		H			H				
	0		H			H				
	0		H			H				
	0		H			H				
	0		H			H				



## SAP User Manual for Calibration/Statutory/Survey Maintenance

Order Saved as Technically Completed and updated in status TECO

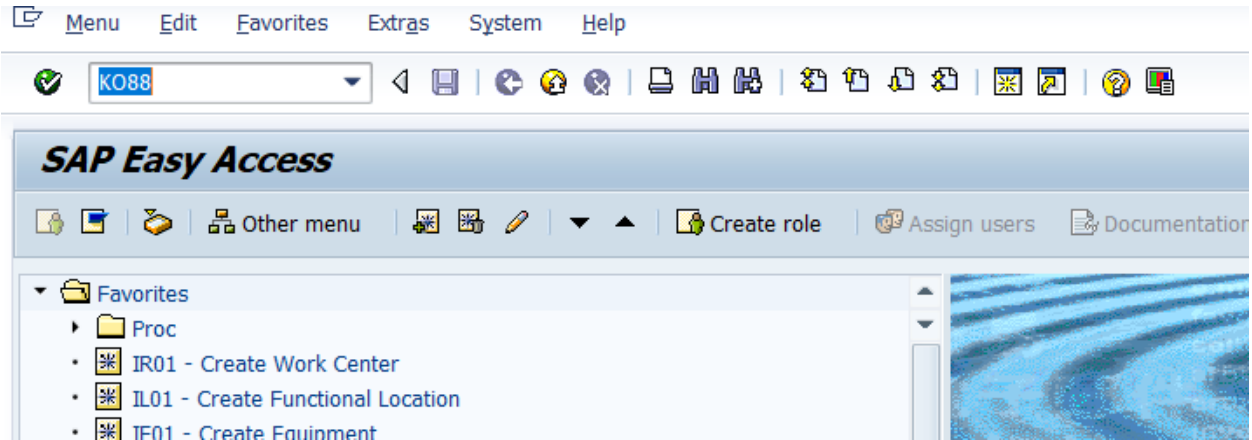


## Settlement of Order

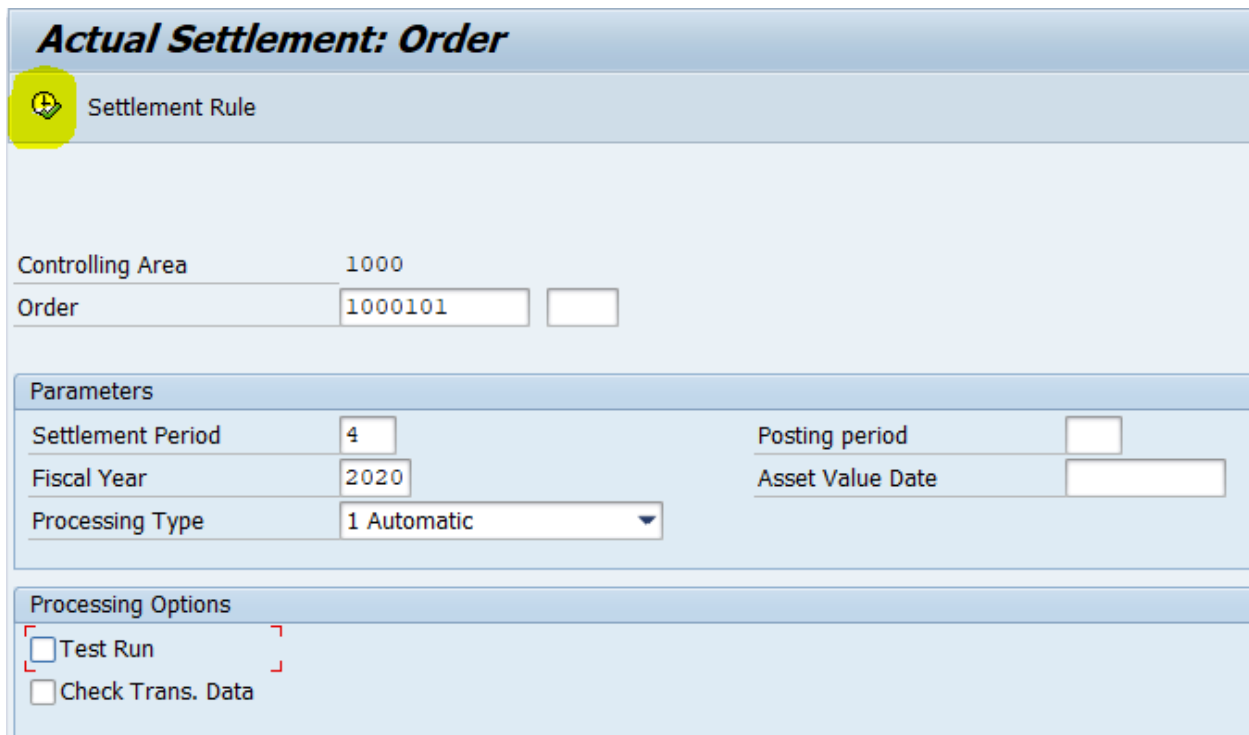
Enter T code KO88 for Settlement to Cost Center



## SAP User Manual for Calibration/Statutory/Survey Maintenance



Enter the Controlling Area 1000





Enter Settlement Period 04 and Fiscal Year 2020 and remove test run Tick box



## SAP User Manual for Calibration/Statutory/Survey Maintenance

**Actual Settlement: Order Basic list**

### Selection

Selection Parameters	Value	Name
Order	1000101	Cal/Stat/Survey Maint
Period	004	
Posting Period	004	
Fiscal Year	2020	
Processing Type	1	Automatic
Posting Date	31.07.2020	
Controlling Area	1000	MBPT Controlling Area
Currency	INR	Indian Rupee

### Processing Options

Selection Parameters	Value
Execution Type	Settlement Executed
Processing Mode	Udate run

Processing completed with no errors

### Statistics

Processing Category	Σ	Number
Settlement Executed		1
No Change		
Not Relevant		
Inappropriate Status		
Error		

Click on highlighted option called Detail List.



## SAP User Manual for Calibration/Statutory/Survey Maintenance

<b>Actual Settlement: Order Detail list</b>				
Basic list          Sender    Receiver   Accounting documents				
<b>Detail list - Settled values</b>				
Senders	Short text: Sender	Receiver	Σ ValCOArCur	Inform.
ORD 1000101	Cal/Stat/Survey Maint	CTR 10050401	57,000.00	
			<b>■ 57,000.00</b>	

Order Settled to the Cost Center

### Closure of Order

Enter Transaction IW32

<b>Change Order: Initial Screen</b>						
Header data	Operations	Components	Costs	Additional data	Planning	Control
Order	<input type="text" value="1000101"/>					

Press Enter, click on Complete Business or (ctrl+shift+12)





## SAP User Manual for Calibration/statutory/Survey Maintenance

**Change Calibration/Statutory/Survey Maintenance 1000101: Central Heade**

Complete (business)

Order ZM03 00101 Cal/Stat/Survey Maint

Sys.Status TECO GMPS JBFI NMAI PRC SETC

HeaderData Operations Components Costs Objects Additional Data Location Planning Control

Person responsible

PlannerGrp 107 / 1000 MEED

Mn.wk.ctr PM CME / 1000 PM CME Department

Notifctn

Costs 0.00 INR

PMActType

SystCond.

Dates

Bsc start 31.12.2021 Priority

Basic fin. 31.12.2021 Revision

Reference object

Func. Loc. 1000-COTN-0002 Kala Chowkey

Equipment 10000340 5 HP Pumping Set No. 1

Assembly



## SAP User Manual for Calibration/statutory/Survey Maintenance

Click on complete, Status will be updated CLSD after execute it.

Order Closed for further posting.