



SAP User Manual for Equipment Creation & Installation

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

**Business Process Manual for
Equipment Creation & Installation**

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SAP User Manual for Equipment Creation & Installation

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

Document History:

Authors & Participants	
Role	Name

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



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Reviewed and Approved By			
Name	Title	Date	Approved



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

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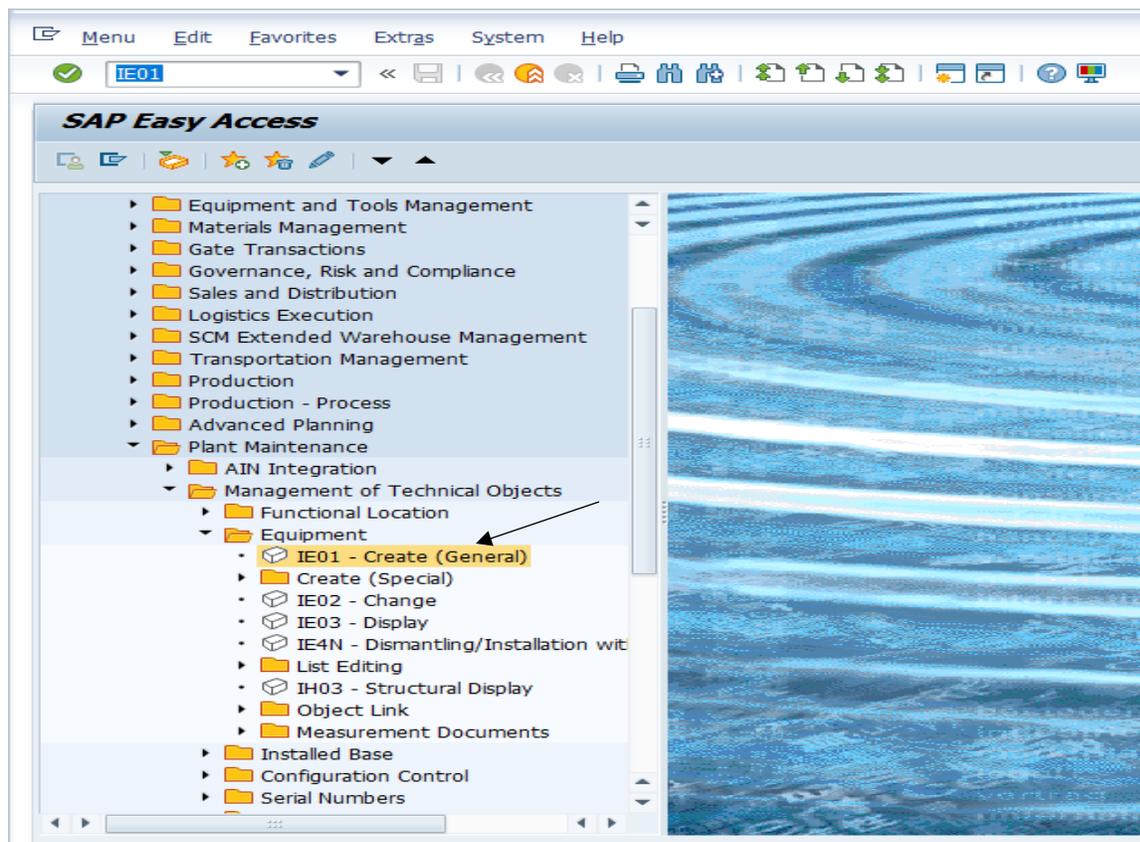


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1. Creation of Equipment

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

Step 1: Enter Transaction code IE01 in command bar (or) Follow the below navigation path





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Step 2: Double click on “IE01” the system will open the below screen
In the next screen

The screenshot displays the SAP 'Create Equipment : Initial Screen' interface. At the top, there is a menu bar with options: Equipment, Edit, Goto, Extras, Structure, Environment, System, and Help. Below the menu is a toolbar with various icons for navigation and actions. The main content area is titled 'Create Equipment : Initial Screen' and contains the following fields:

- Equipment:** A text input field with a search icon on the right.
- Valid On:** A date input field containing '27.01.2021'.
- Equipment category:** A dropdown menu showing 'M' and the text 'Machines'.
- Reference:** A section containing two input fields: 'Equipment' and 'Material'.



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Step3:

Select the Equipment Category by Pressing F4 & Press "Enter"

The screenshot shows the SAP 'Create Equipment : Initial Screen' interface. The main window has a menu bar (Equipment, Edit, Goto, Extras, Structure, Environment, System, Help) and a toolbar. The 'Equipment category' field is set to 'M Machines'. A pop-up window titled 'Equipment category (1) 7 Entries found' is open, displaying a list of categories under the heading 'Equipment category description'. The list includes: B Construction machinery, E Electrical, G GG Equip Category (IS-HT-SW), M Machines, P Production resources/tools, Q Test/measurement equipment, and S Customer equipment. A callout box with an arrow points to the 'B Construction machinery' entry, containing the text 'Enter the Equipment Category'.

Equipment category description
B Construction machinery
E Electrical
G GG Equip Category (IS-HT-SW)
M Machines
P Production resources/tools
Q Test/measurement equipment
S Customer equipment



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Step4:

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

Equipment: IM0000000001IE Category: M Machines

Description: Intern.note

Status: AVLB i

Valid From: Valid To: 31.12.9999

General | Location | Organization | Structure | Warranty | SerData

General data

Class: Object Type: AuthorizGroup: Weight: Size/dimension: Inventory no.: Start-up date:

Reference data

AcquistnValue: Acquisition date:

Manufacturer data

Manufacturer: ManufCountry: Model number: Constr.yr/mth: ManufPartNo.: ManufSerialNo.:

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Step 5:

Enter below Details in EQ General Screen Description, Object Type, Size, Startup date, and Manufacturer data etc.

Equipment: TM0000000001IE Category: M Machines
Description: Centrifugal Pump Intern.note
Status: AVLB
Valid From: 01032020 Valid To: 31.12.9999

General Location Organization Structure Warranty SerData

General data
Class:
Object Type: Z005
AuthorizGroup:
Weight: 100 KG Size/dimension: 1X2 M
Inventory no.: xxxxxxxxxxxx Start-up date: 01032020

Reference data
AcquistnValue: 1000000 INR Acquisition date: 01032020

Manufacturer data
Manufacturer: Beacon ManufCountry: DE
Model number: BE 125 Constr.yr/mth: 2020 / 03
ManufPartNo.:
ManufSerialNo.: B12345



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Step 6:

Enter below Details in EQ Location Screen Address Details, Critical Status, Legacy Equipment of Equipment

The screenshot shows the SAP 'Create Equipment : Location' screen. The 'Location data' section contains the following fields:

MaintPlant	1100
Location	
Room	
Plant Section	
Work center	
ABC Indic.	C
Sort Field	X12345

Annotations with arrows point to the 'ABC Indic.' field (labeled 'Critical Status') and the 'Sort Field' field (labeled 'Legacy Equipment No'). The 'Address' section below contains fields for Name, Street, Location, Telephone, and Fax.



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Step 7:

By Clicking the address create icon system will open address entry Screen

The screenshot shows the SAP Address maintenance: Create "Maintenance object address" dialog box. The dialog is divided into several sections:

- Name:** Includes fields for Title (dropdown), Name, and Description.
- Search Terms:** Includes a field for Search term 1/2.
- Street Address:** Includes fields for Street/House number, Postal Code/City, Country (with a checkbox), and Region.
- PO Box Address:** Includes fields for PO Box, Postal Code, and Company Postal Code.
- Communication:** Includes fields for Language (dropdown, set to English), Telephone, Extension, Mobile Phone, Fax, E-Mail, and Standard Method. There are also buttons for "Other Communication..." and "Preview".

The SAP logo is visible in the bottom right corner of the dialog box.



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Step 8:

Select respective Cost Center, Main Work Center, Planner Group, Maintenance Planning plant by pressing F4 in Organization tab

The screenshot shows the SAP 'Create Equipment : Organization' screen. The 'Organization' tab is active, displaying the following data:

Account assignment	
Company Code	1100 Chennai Port Trust Chennai
Business Area	
Asset	
Cost Center	11050506 / 1100 Pipe Lines
WBS Element	
StandgOrder	
SettlementOrder	

Responsibilities	
Planning Plant	1100 Chennai Port Trust
Planner Group	107 MEED
Main WorkCtr	MEED PH 1100 MEED Pump House Div
Catalog Profile	

Callouts in the image point to the following fields:

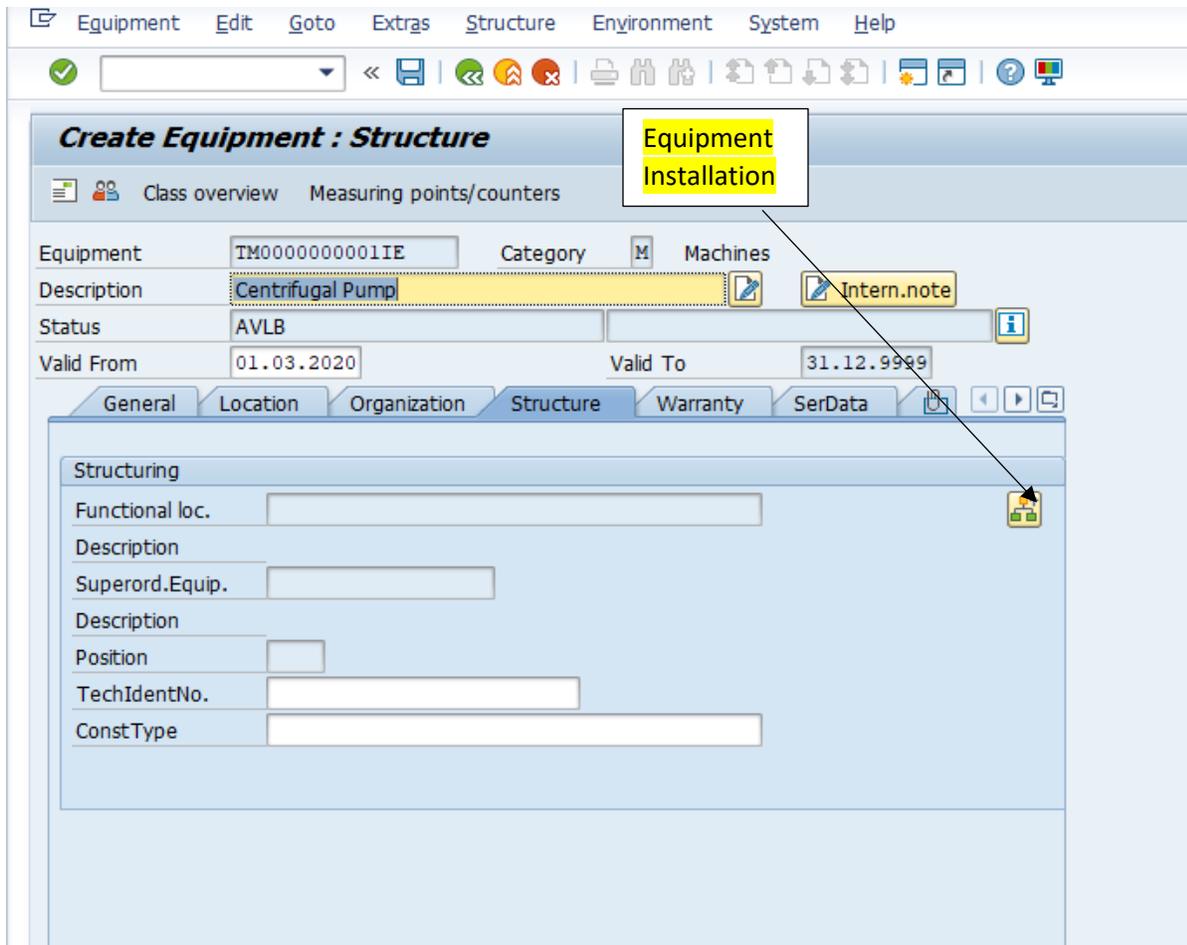
- Cost Center:** Points to the 'Cost Center' field (11050506 / 1100).
- Planning Plant:** Points to the 'Planning Plant' field (1100).
- Planner Group:** Points to the 'Planner Group' field (107).
- Maintenance work Center:** Points to the 'Main WorkCtr' field (MEED PH).



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Step 9:

In Structure tab select Functional Location where equipment need to be installed by clicking this icon 





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The screenshot shows the SAP 'Create Equipment : Structure' dialog box. The main window has tabs for General, Location, Organization, Structure, Warranty, and SerData. The 'Structure' tab is active, showing fields for Functional loc., Description, Superord. Equip., Position, and Inst/DismTime. A pop-up window titled 'Change Equipment Installation Location' is open, with the 'Functional loc.' field set to '1100-PUMP'. A callout box on the left contains the text: 'Functional Location Selection by F4 or Manual', with an arrow pointing to the 'Functional loc.' field in the pop-up.

Equipment: TM0000000001IE Category: M Machines

Description: Centrifugal Pump Intern.note

Plant: AVLB Info

From: 01.03.2020 Valid To: 31.12.9999

General Location Organization Structure Warranty SerData

Structuring

Functional loc. Info

Description

Change Equipment Installation Location

Functional loc. 1100-PUMP Info

Superord. Equip.

Position

Inst/DismTime 01.03.2020 00:00:00

Inst. w. Data Transfer X



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Equipment Edit Goto Extras Structure Environment System Help

Class overview Measuring points/counters

Equipment: TM0000000001IE Category: M Machines

Description: Centrifugal Pump Intern.note

Status: INST

Valid From: 01.03.2020 Valid To: 31.12.9999

General Location Organization Structure Warranty SerData

Structuring

Functional loc.: 1100-PUMP

Description: Pump Room

Superord.Equip.:

Description:

Position:

TechIdentNo.:

ConstType:



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Step 10:

In Warranty Tab Equipment Warranty AMC Details to be captured

The screenshot shows the SAP 'Create Equipment : Warranty' interface. The 'Warranty' tab is active, displaying the following fields and sections:

- Equipment:** TM000000001IE
- Category:** Machines
- Description:** Centrifugal Pump
- Status:** INST
- Valid From:** 01.03.2020
- Valid To:** 31.12.9999

The 'DL Period/Warranty' section includes:

- Begin guarantee: []
- Warranty end: []
- Master warranty: []
- InheritWarranty
- Pass on warranty

The 'AMC' section includes:

- Begin guarantee: []
- Warranty end: []
- Master warranty: []
- InheritWarranty
- Pass on warranty

The 'Risk & Criticality' section contains a table with the following structure:

Assessment	Description	Group



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Step 11:

Equipments related documents will be created in documents tab

The screenshot shows the SAP 'Create Equipment : Documents' screen. At the top, the 'Equipment Class' field is highlighted in yellow. Below it, the 'Description' field contains 'Centrifugal Pump'. The 'Valid From' date is 01.03.2020 and 'Valid To' is 31.12.9999. The 'Documents' tab is active, showing a table for linked documents with columns: Type, Document, LRv, LVr, Released, Part, Vs, and Description.

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Equipment Related Class selection screen

Assignment Edit Goto Values Extras Environment System Help

✓ [Dropdown] << [Save] [Undo] [Redo] [Cancel] [Print] [Copy] [Paste] [Delete] [Refresh] [Zoom] [Help] [Monitor]

Create Equipment : Classification

Object

Equipment Centrifugal Pump
Class Type [Icon] Equipment Class

Assignments

Class	Description	St...	S..	I...	Itm
[Icon]	[Icon]	<input type="checkbox"/>			<input type="checkbox"/>
[Icon]		<input type="checkbox"/>			<input type="checkbox"/>
[Icon]		<input type="checkbox"/>			<input type="checkbox"/>

[Add] [Search] [Filter] [Sort] [Refresh] [Print] [Copy] [Paste] [Delete] [Help]

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Step 12:

Once Details filled for Equipment Click Save Icon”  ” to save the Equipment

Create Equipment : Initial Screen

Equipment	<input type="text"/>	
Valid On	<input type="text" value="27.01.2021"/>	
Equipment category	<input type="text" value="M"/> Machines	

Reference

Equipment	<input type="text"/>
Material	<input type="text"/>

System Message

Equipment created with the number 10006522