



**SAP User Manual for Preventive Maintenance**

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

**Business Process Manual for  
Preventive Maintenance**

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## SAP User Manual for Preventive 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			
Date	Document Version	Document Revision Description	Author
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## SAP User Manual for Preventive Maintenance

Reviewed and Approved By			
Name	Title	Date	Approved



## **SAP User Manual for Preventive Maintenance**

### **Introduction:**

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

### **Summary:**

In this chapter, we are going to learn about how Preventive 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.



## SAP User Manual for Preventive Maintenance

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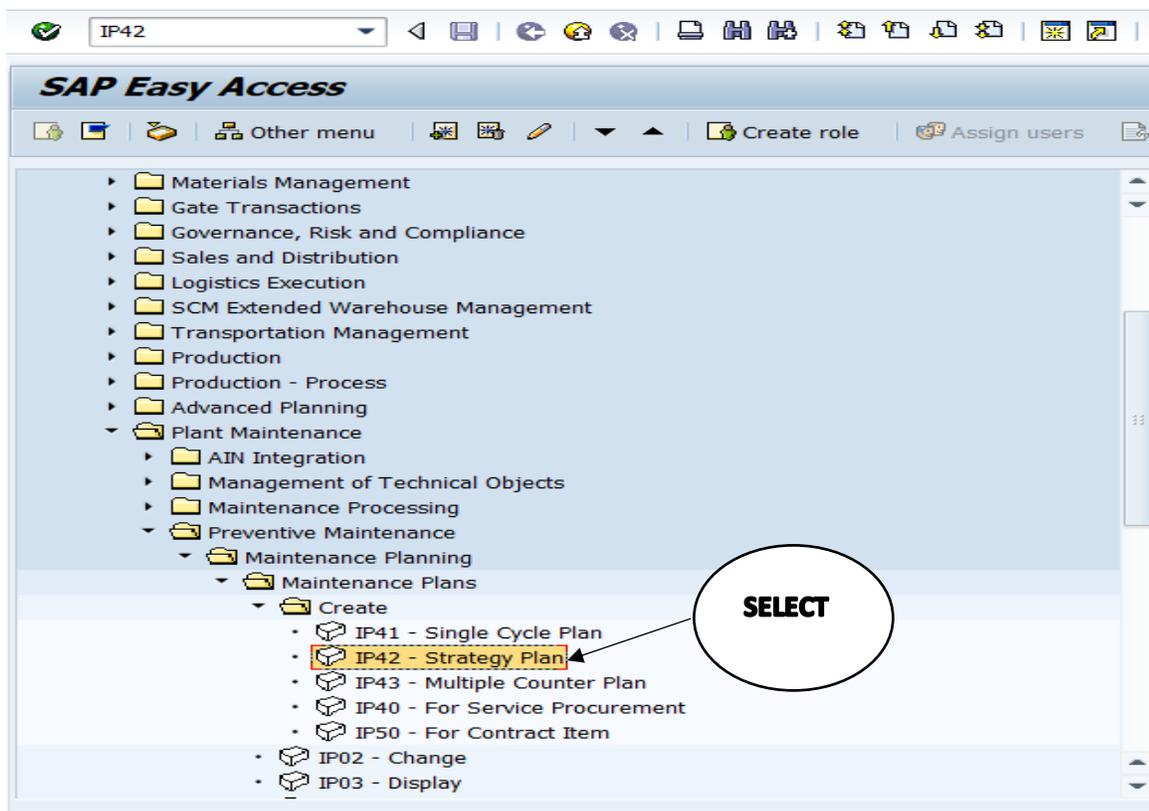
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## SAP User Manual for Preventive Maintenance

### Creation of Maintenance Plan

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

Enter Transaction code IP42 in command bar (or) Follow the below navigation path



Double click on “IP42” the system will open the below screen  
In the next screen, enter the required details as below



## SAP User Manual for Preventive Maintenance

### Under Initial Screen:

Maintenance Plan Category (PM Maintenance Order) & Strategy (B or any other from F4) for select from dropdown menu and **press enter key** to proceed

Maintenance plan

Maint. plan cat.

Strategy



## SAP User Manual for Preventive Maintenance

Enter Description of Maintenance Plan Functional Location & Task List for proceed further.  
Show below.

Maintenance plan cycle 19.07.2020    Maintenance plan scheduling parameters    Maintenance plan additional data

Cycle	Unit	Maintenance cycle text	Offset
	3 MON	3-monthly	0
	12 MON	Yearly	0

## SAP User Manual for Preventive Maintenance

Item | Object list item | Item location | Cycle item 19.07.2020

Maintenance Item: Preventive Maint for Eq

Reference object

Functional loc.: 1000-WDLA-0002 "Antop Village, Wadala"

Equipment: 10000338 30 HP Kirloskar Water Pumping Set

Assembly:

Planning Data

Planning Plant: 1000 Mumbai Port Trust | Maint. Planner Group: 107 MEED

Order Type: ZM01 Preventive Maintenance | MaintActivityType:

Main WorkCtr: PM\_CME / 1000 PM CME Departme... | Business Area:

Priority: | Settlement Rule:

Sales Document: /

Task List

Type: A / 5 | Description: List For Generator

Press Enter this will fill the information related to F4 Values.

Maint. plan hea... | Maintenance plan cycle 19.07.2020 | Maintenance plan scheduling parameters | Maintenance plan additional data

Cycle	Unit	Maintenance cycle text	Offset
	3 MON	3-monthly	0
	12 MON	Yearly	0

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 Preventive Maintenance

**Create Maintenance Plan: Strategy plan**

Maintenance plan:

Maint. plan head...

Maintenance plan cycle 19.07.2020 | Maintenance plan scheduling parameters | Maintenance plan additional data

Date determination		Call control parameter		Scheduling indicator	
Shift Factor Late Compl.	100 %	Call horizon	80 %	<input type="radio"/>	Time
Tolerance (+)	<input type="text"/>	Scheduling period	10 YR	<input checked="" type="radio"/>	Time - key date
Shift Factor Early Compl.	100 %	Completion Requirmnt	<input type="checkbox"/>	<input type="radio"/>	Time - factory caldr
Tolerance (-)	<input type="text"/>	Start scheduling			
Cycle modification factor	1,00	Start of cycle: 19.07.2020			
Factory calendar	01				

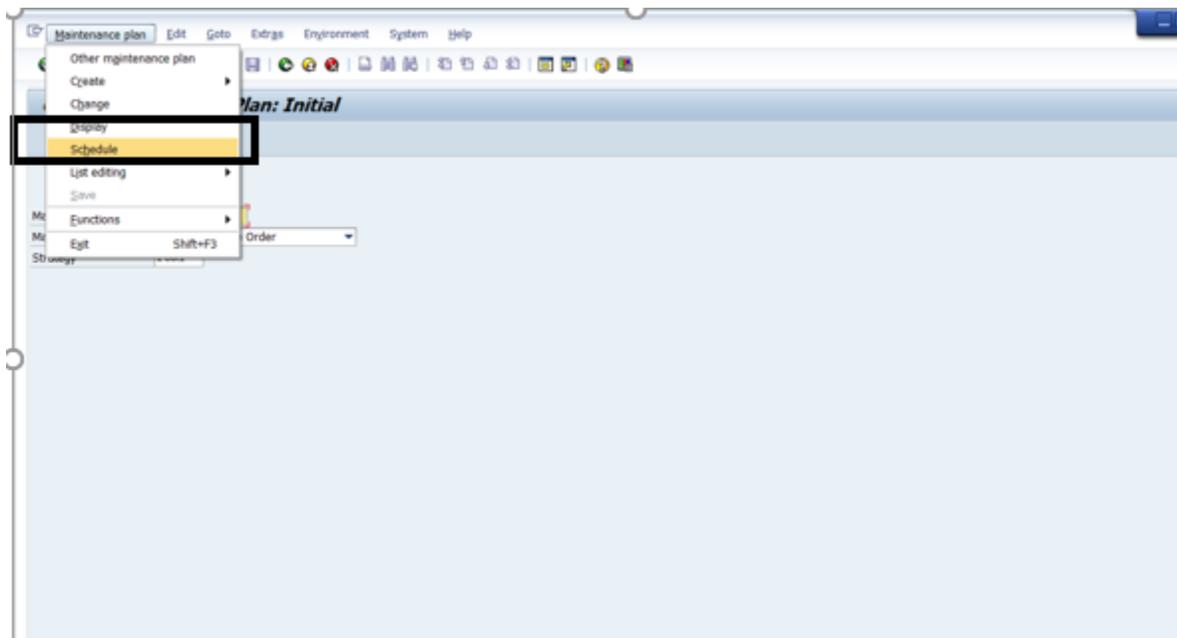
After that click on save button, on the bottom you will get the msg after save with Maintenance Plan Numbe.

Maintenance plan  created

## SAP User Manual for Preventive Maintenance

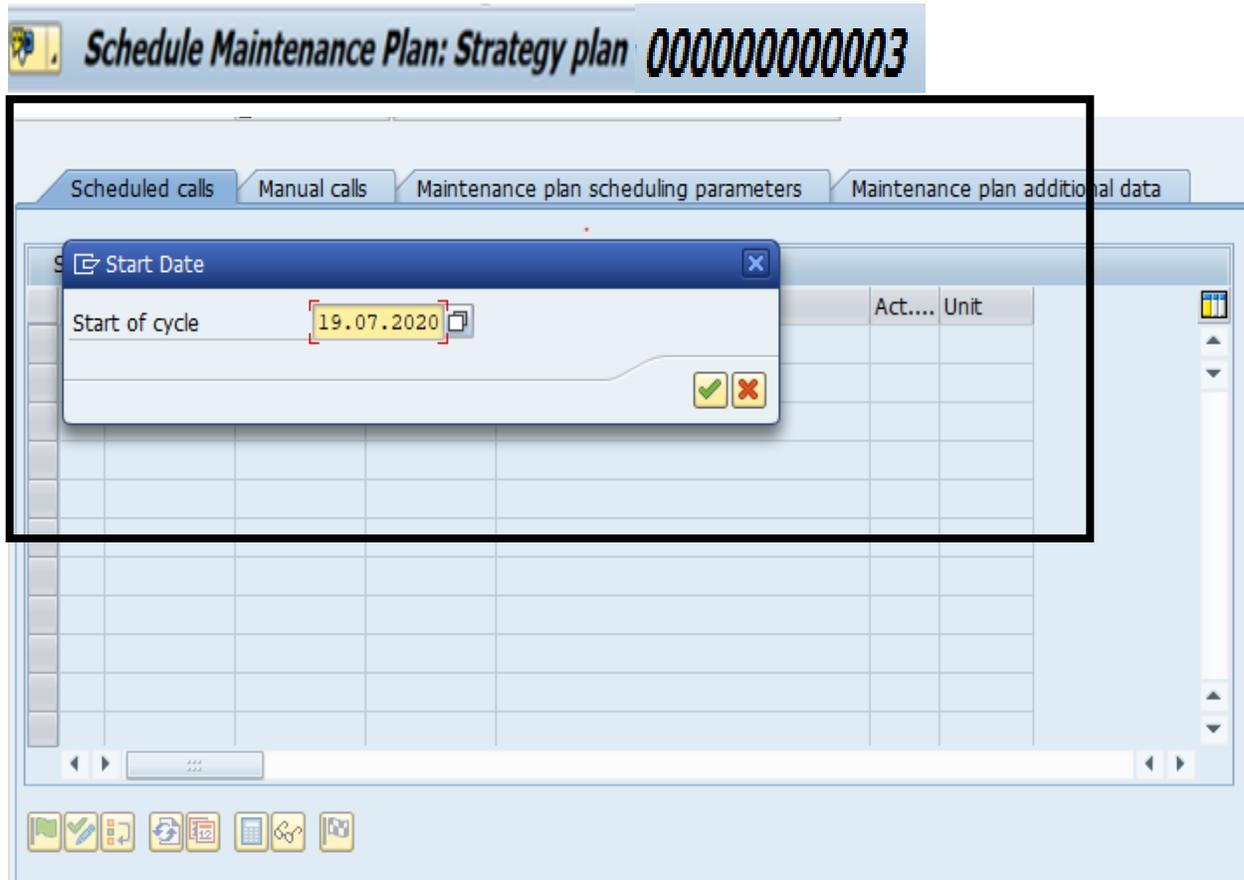
### Scheduling of Maintenance Plan

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



## SAP User Manual for Preventive Maintenance

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





## SAP User Manual for Preventive Maintenance

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.

**Deadline Monitoring for Maintenance Plans (Batch Input IP10)**

Deadline monitoring for maintenance plans

Maintenance Plan	1	to	3	
Maint. plan cat.	PM	to		
MaintPlan sort field		to		
Maintenance Strategy	B	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

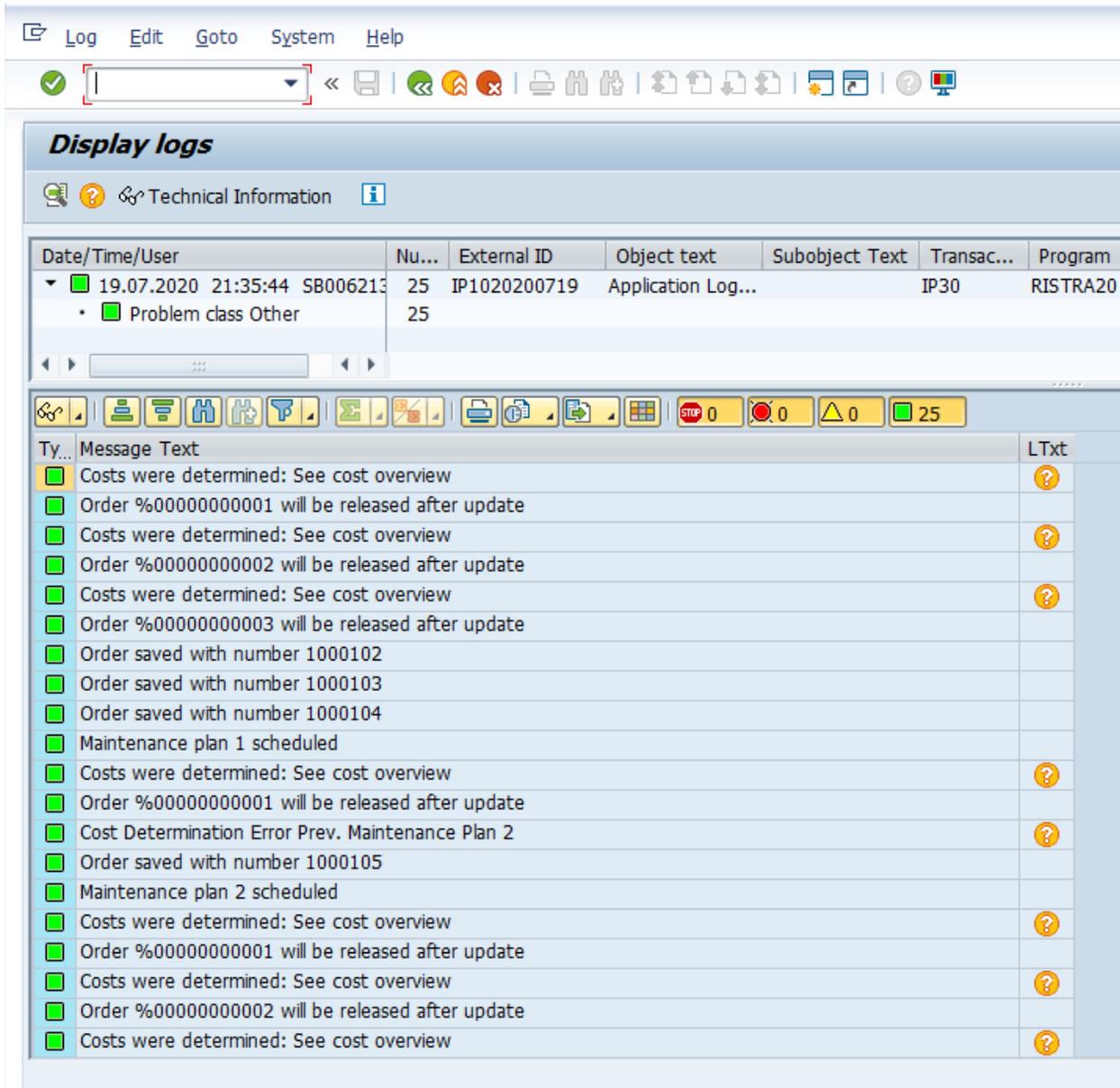
Call transaction  
Call mode: N

BDC session  
Group name: IP1020200719  
User ID: SB00621355



## SAP User Manual for Preventive Maintenance

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



The screenshot shows the SAP 'Display logs' window. At the top, there is a menu bar with 'Log', 'Edit', 'Goto', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area is titled 'Display logs' and contains a search bar and a 'Technical Information' icon. A table displays log entries with columns: Date/Time/User, Nu..., External ID, Object text, Subsubject Text, Transac..., and Program. The first entry is for '19.07.2020 21:35:44 SB006213' with 'Nu...' 25 and 'External ID' IP1020200719. Below this, a sub-entry shows 'Problem class Other' with 'Nu...' 25. At the bottom, a toolbar contains status indicators for 'STOP 0', '0', '0', and '25'. The main list shows a series of messages, including 'Costs were determined: See cost overview' and 'Order %00000000001 will be released after update'. The 'LTxt' column contains question marks for several entries.

Date/Time/User	Nu...	External ID	Object text	Subsubject Text	Transac...	Program
19.07.2020 21:35:44 SB006213	25	IP1020200719	Application Log...		IP30	RISTRA20
• 19.07.2020 21:35:44 SB006213	25		Problem class Other			

Ty...	Message Text	LTxt
■	Costs were determined: See cost overview	?
■	Order %00000000001 will be released after update	?
■	Costs were determined: See cost overview	?
■	Order %00000000002 will be released after update	?
■	Costs were determined: See cost overview	?
■	Order %00000000003 will be released after update	
■	Order saved with number 1000102	
■	Order saved with number 1000103	
■	Order saved with number 1000104	
■	Maintenance plan 1 scheduled	
■	Costs were determined: See cost overview	?
■	Order %00000000001 will be released after update	?
■	Cost Determination Error Prev. Maintenance Plan 2	?
■	Order saved with number 1000105	
■	Maintenance plan 2 scheduled	
■	Costs were determined: See cost overview	?
■	Order %00000000001 will be released after update	?
■	Costs were determined: See cost overview	?
■	Order %00000000002 will be released after update	?
■	Costs were determined: See cost overview	?



## SAP User Manual for Preventive Maintenance

on “Back”  button again for exit

**Deadline Monitoring for Maintenance Plans (Batch Input IP10)**

Maintenance Plan Date Monitoring

Maintenance Plan	Maintenance Strategy	MaintPlanText
1	B	Preventive Maint for Eq
2	B	Preventive Maint for Eq
3	B	Preventive Maint for Eq



## SAP User Manual for Preventive 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 Maintenance plan cat. (pm), Maintenance Plan, Maintenance Item, Maintenance Strategy, Maintenance item text, Functional Location (1000-WDLA-0002), Equipment (10000338), Assembly, Material, and Serial Number. The Equipment field is highlighted in yellow. The Maintenance dates section includes fields for Order, Notification, Entry Sheet, and Scheduled start date. The form also includes a Settlement rule section with radio buttons for 'with or w/o', 'w/', and 'w/o', and a checkbox for 'with object list'. The top of the form shows a menu bar with Program, Edit, Goto, System, and Help, and a toolbar with various icons.



## SAP User Manual for Preventive Maintenance

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

S.	Maintenance Item	MntPlan	Strat.	Maintenance item description	Call Number	Start date	Order
1	143	3	B	Preventive Maint for Eq	1	01.09.2020	1000071
2	143	3	B	Preventive Maint for Eq	2	24.09.2020	1000100
3	143	3	B	Preventive Maint for Eq	3	24.12.2020	1000106
4	143	3	B	Preventive Maint for Eq	4	24.03.2021	1000107
5	143	3	B	Preventive Maint for Eq	5	24.06.2021	1000108
6	143	3	B	Preventive Maint for Eq	6	24.09.2021	
7	143	3	B	Preventive Maint for Eq	7	24.12.2021	
8	143	3	B	Preventive Maint for Eq	8	24.03.2022	
9	143	3	B	Preventive Maint for Eq	9	24.06.2022	
10	143	3	B	Preventive Maint for Eq	10	24.09.2022	
11	143	3	B	Preventive Maint for Eq	11	24.12.2022	
12	143	3	B	Preventive Maint for Eq	12	24.03.2023	
13	143	3	B	Preventive Maint for Eq	13	24.06.2023	
14	143	3	B	Preventive Maint for Eq	14	24.09.2023	
15	143	3	B	Preventive Maint for Eq	15	24.12.2023	
16	143	3	B	Preventive Maint for Eq	16	24.03.2024	
17	143	3	B	Preventive Maint for Eq	17	24.06.2024	
18	143	3	B	Preventive Maint for Eq	18	24.09.2024	
19	143	3	B	Preventive Maint for Eq	19	24.12.2024	
20	143	3	B	Preventive Maint for Eq	20	24.03.2025	
21	143	3	B	Preventive Maint for Eq	21	24.06.2025	
22	143	3	B	Preventive Maint for Eq	22	24.09.2025	
23	143	3	B	Preventive Maint for Eq	23	24.12.2025	
24	143	3	B	Preventive Maint for Eq	24	24.03.2026	
25	143	3	B	Preventive Maint for Eq	25	24.06.2026	
26	143	3	B	Preventive Maint for Eq	26	24.09.2026	
27	143	3	R	Preventive Maint for Eq	27	24.12.2026	

Schedule generated for one year from the date of trigger.



## SAP User Manual for Preventive Maintenance

### External Service Creation in Maintenance Order

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 displays the SAP IW32 'Change Preventive Maintenance 1000100: Central Header' interface. The menu bar includes 'Order', 'Edit', 'Goto', 'Extras', 'Environment', 'System', and 'Help'. The title bar shows 'Change Preventive Maintenance 1000100: Central Header' and 'Complete (business)'. The main data area contains the following fields:

- Order: ZM01 1000100
- Preventive Maint for Eq
- Sys.Status: REL NMAT PRC
- Person responsible: PlannerGrp 107 / 1000 MEED, Mn.wk.ctr PM\_CME / 1000 PM CME Departm...
- Dates: Bsc start 24.09.2020, Basic fin. 24.09.2020, Priority, Revision
- Reference object: Func. Loc. 1000-WDLA-0002 "Antop Village, Wadala", Equipment 10000338 30 HP Kirloskar Water Pumping Set, Assembly
- First operation: Operation A Check, Calc. key, WkCtr/Plnt PM\_CME / 1000, Ctrl key PM01, Acty Type, Work durtn, Number, Oprtn dur.



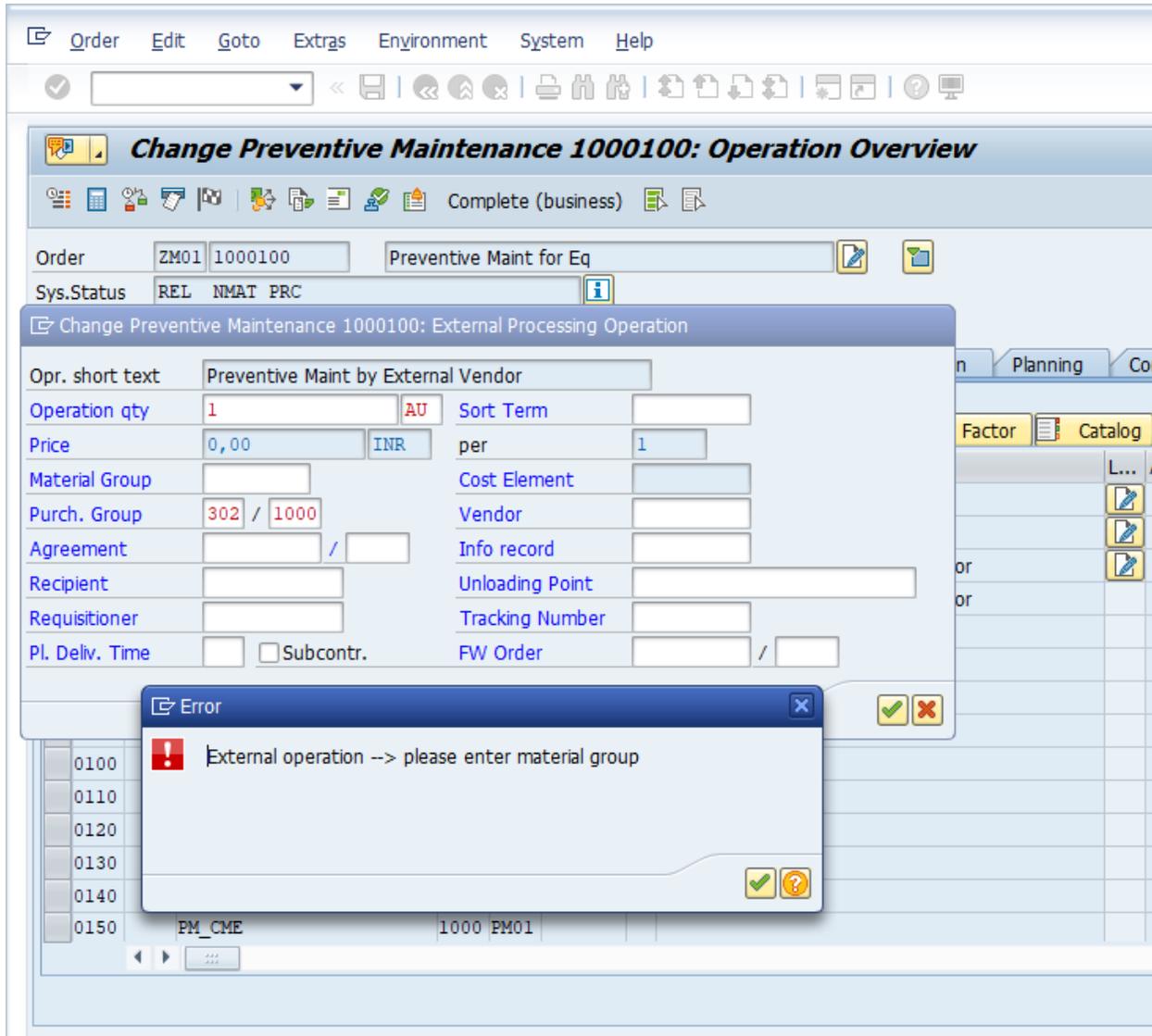
## SAP User Manual for Preventive Maintenance

For preventive Maintenance by External Vendor, change the control key from PM01 to PM03 because of Tendering activity.

Op...	SOp	Work Ctr	Plant	Co...	StTextK	S...	Operation short text	L...	Actual work	Work	Un	N...	Dur.	Un	C.Key	ActT
0010		PM_CME	1000	PM01			A Check		0,000							
0020		PM_CME	1000	PM01			B Check		0,000							
0040		PM_CME	1000	PM03			Preventive Maint by External Vendor		0	0H				H	Calculate du...	
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		
0150		PM_CME	1000	PM01					0		H			H		



## SAP User Manual for Preventive Maintenance



And Press, "Enter"



## SAP User Manual for Preventive Maintenance

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

Change Preventive Maintenance 1000100: Operation Overview

Order: ZM01 1000100 Preventive Maint for Eq

Sys.Status: REL MANC NMAT NTUP PRC

Change Preventive Maintenance 1000100: External Processing Operation

Opr. short text: Preventive Maint by External Vendor

Operation qty: 1 AU Sort Term:

Price: 0,00 INR per: 1

Material Group: 72000000 Cost Element:

Purch. Group: 101 1000 Vendor:

Agreement: / Info record:

Recipient: Unloading Point:

Requisitioner: Tracking Number:

Pl. Deliv. Time:  Subcontr. FW Order: /

0110	PM_CME	1000	PM01		
0120	PM_CME	1000	PM01		

Below message will appear for not maintaining external operation.

Purchase requisition for service activity / element cannot be generated



## SAP User Manual for Preventive 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 Preventive Maintenance 1000100: Operation Overview

Order: ZM01 1000100 Preventive Maint for Eq  
Sys.Status: REL NMAI PRC

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

General	Internal	<b>External</b>	Dates	Act. Data	Enhancement	Ex. Factor	Catalog				
Op...	SOp	Work Ctr	Plant	Co...	StTextK	S..	Operation short text	L...	Actual work	Work	Un
0010		PM_CME	1000	PM01			A Check		0,000		
0020		PM_CME	1000	PM01			B Check		0,000		
0040		PM_CME	1000	PM03			Preventive Maint by External Vendor		0	0	H
0050		PM_CME	1000	PM01					0		H
0060		PM_CME	1000	PM01					0		H
0070		PM_CME	1000	PM01					0		H
0080		PM_CME	1000	PM01					0		H
0090		PM_CME	1000	PM01					0		H
0100		PM_CME	1000	PM01					0		H



## SAP User Manual for Preventive Maintenance

The screenshot shows the SAP PM03 transaction 'Change Preventive Maintenance 1000100: External Processing Operation'. The 'Header data' tab is active, displaying the following information:

- Order: 1000100, Activity: 0040, Ctrl key: PM03
- StdTextKey/ShrtText: Preventive Maint by External Vendor
- General tab: Operation qty: 1, Price: 160.000,00 INR, Material Group: 72000000, Purch. Group: 101 / 1000, Requisitioner: MP00611268.
- Services tab: A table with 10 lines. Line 10 is highlighted, showing Service No. 8300000085, Short Text: Two Coats - Oil Bound Distemper, Quantity: 10, Un: M2, Gross Price: 16.000,00, Crcy: INR, U Cost Elem: 41300012.

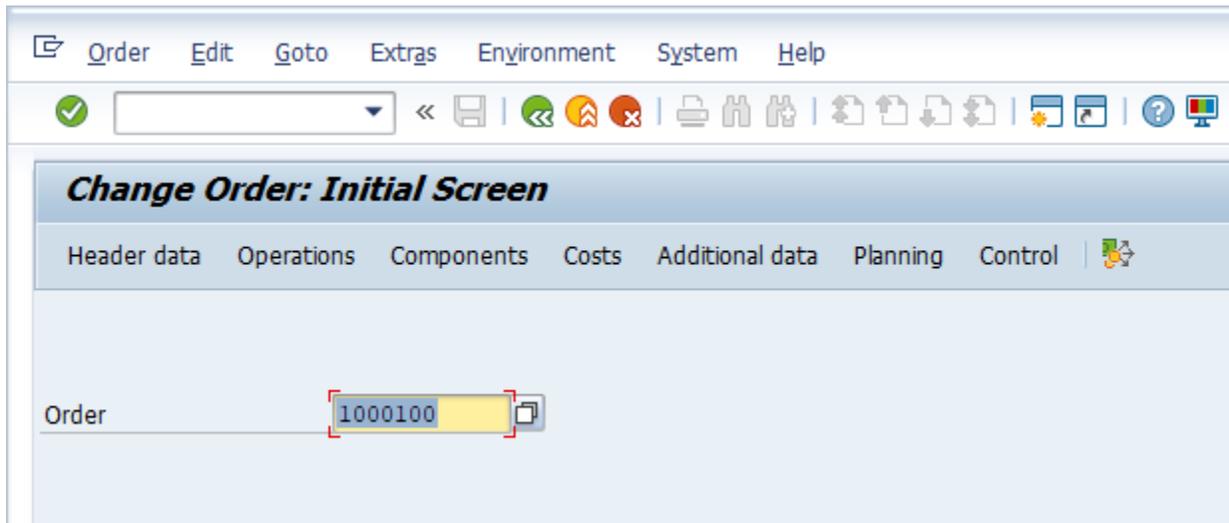
Click on Header Data & Save it.

Order saved with number 1000100



## SAP User Manual for Preventive Maintenance

Open the order again using TCODE IW32 and enter the Order No 1000100



## SAP User Manual for Preventive Maintenance

Release the Order by Clicking  this Icon

Order ZM01 1000100 Preventive Maint for Eq

Sys.Status REL NMAI PRC

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 24.09.2020 Priority

Basic fin. 24.09.2020 Revision

Reference object

Func. Loc. 1000-WDLA-0002 "Antop Village, Wadala"

Equipment 10000338 30 HP Kirloskar Water Pumping Set

Assembly

First operation

Operation A Check Calc. key

WkCtr/Plnt PM\_CME / 1000 Ctrl key PM01 Acty Type  PRT

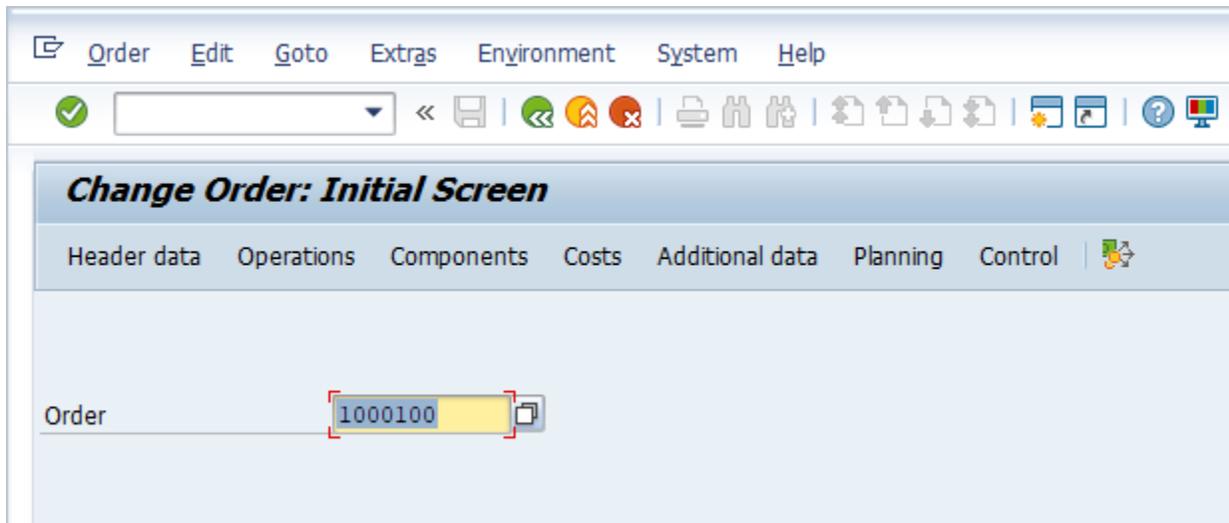
After Release save the Order again using save icon . The system will show the following message

Order saved with number 1000100



## SAP User Manual for Preventive Maintenance

Open the order again using TCODE IW32 and enter the Order No 1000100 and Press Enter





## SAP User Manual for Preventive Maintenance

Go to Operation Tab and Select the Operation and Actual Data

Op...	SOp	Work Ctr	Plant	Co...	StTextK	S...	Operation short text	L...	Actual work	Work	Un	N...	Dur.	Un	C.Key
0010		PM_CME	1000	EM01			A Check		0,000						
0020		PM_CME	1000	EM01			B Check		0,000						
0040		PM_CME	1000	EM03			Preventive Maint by External Vendor		0	0H				H	Calculate du...
0060		PM_CME	1000	EM01					0		H			H	
0070		PM_CME	1000	EM01					0		H			H	
0080		PM_CME	1000	EM01					0		H			H	
0090		PM_CME	1000	EM01					0		H			H	
0100		PM_CME	1000	EM01					0		H			H	
0110		PM_CME	1000	EM01					0		H			H	
0120		PM_CME	1000	EM01					0		H			H	
0130		PM_CME	1000	EM01					0		H			H	
0140		PM_CME	1000	EM01					0		H			H	
0150		PM_CME	1000	EM01					0		H			H	



## SAP User Manual for Preventive Maintenance

Purchase Requisition Created under this No 2001000961

Order 1000100 Activity 0040 / Ctrl key PM03  
StdTextKey/ShrtText Preventive Maint by External Vendor

General Internal External Dates Act. Data Dry Dock

Completion confirmation  
Confirmation 621 Actual work 0  
No Remain. Work  Forecast work 0

Requisition 2001000961 10 PR Qty 0,000  
Res./Purc. Req. immediately PO Exists

Services Components Relationships

Line	D.	Service No.	Short Text	Quantity	Un	Gross Price	Crcy	Overf. Tol.	U Cost Elem...	S...
10	<input type="checkbox"/>	8300000085	Two Coats - Oil Bound Distemper	10	M2	16.000,00	INR		41300012	
20	<input type="checkbox"/>						INR			
30	<input type="checkbox"/>						INR			
40	<input type="checkbox"/>						INR			

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





## SAP User Manual for Preventive Maintenance

Go to customer data Tab, and fill the detail for Tender or Non Tender

The screenshot shows the SAP interface for 'Change Purchase Req. 2001000961'. The 'Customer Data' tab is active, and the 'Mode of Purchase' field is set to 'Tender'. The 'Purchase types' field is also visible. The table below shows the item details for 'Preventive Maint by External Vendor'.

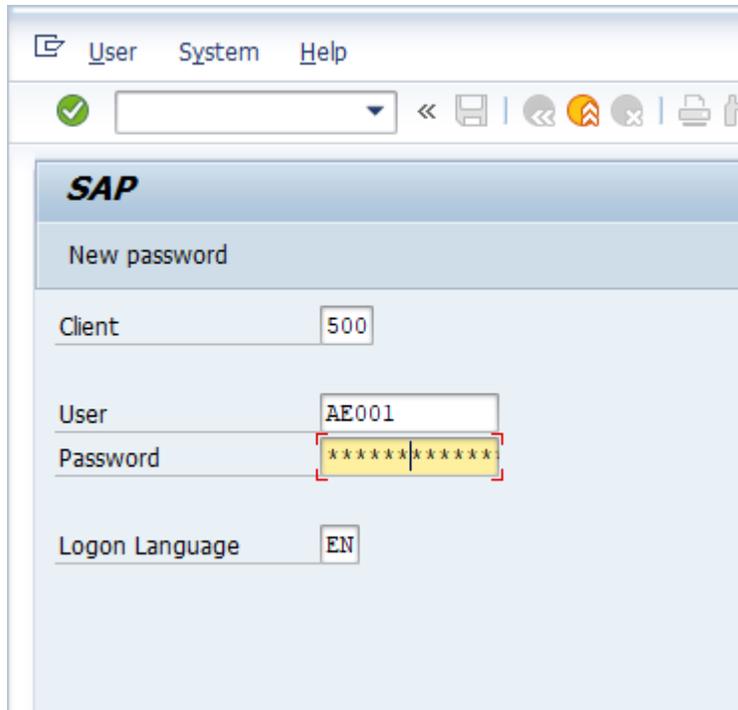
St...	Item A	I	Material	Short Text	Quantity	Unit	C	Delivery Date	Val. Price	P...	Matl Group	Available Qty in Stock	Plant	Stor. Lc
	10	F	D	Preventive Maint by Exter...	1	AU	D	24.09.2020	160.00...	1	Constructio...	0.000	Mumbai Port ...	



## SAP User Manual for Preventive Maintenance

### Purchase Requisition Approval

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 area is titled 'SAP' and contains a 'New password' section. The login fields are: Client (500), User (AE001), Password (masked with asterisks), and Logon Language (EN). The Password field is highlighted with a red border.

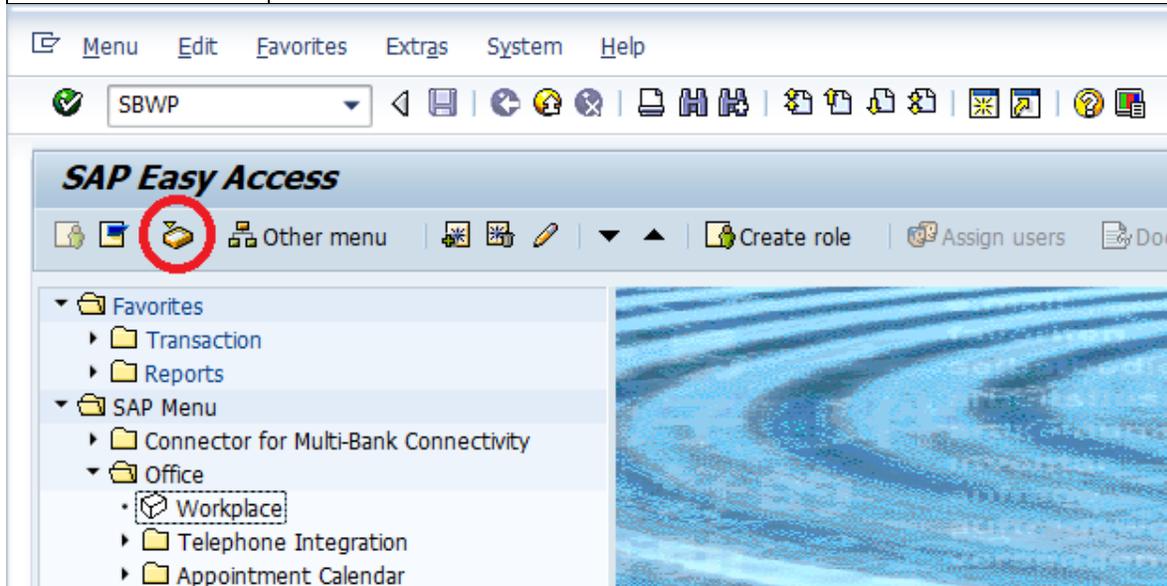


## SAP User Manual for Preventive Maintenance

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 Preventive Maintenance

Expand “Inbox” button, under workflow “Approve Purchase requisition 2002000961” message will appear.

Ex.	Title	Status	Work Item ID	Creation Da.	Creation Time	P	At.	Co.	W.	Dynamic column
	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		415259	19.07.2020	15:05:51	5				
	Please approve the Purchase Requisition 2001000959		415258	19.07.2020	15:05:51	5				
	Please approve the Purchase Requisition 2001000958		415228	17.07.2020	10:00:27	5				
	Please approve the Purchase Requisition 2001000959		415227	17.07.2020	09:59:48	5				
	Please approve the Purchase Requisition 2001000959		414370	17.07.2020	09:58:25	5				
	Please approve the Purchase Requisition 2001000958		414369	17.07.2020	09:57:56	5				
	Please approve the Purchase Requisition 2001000932		412260	03.07.2020	16:48:52	5				
	Please approve the Purchase Requisition 2001000932		412259	03.07.2020	16:48:04	5				

Tips & tricks: Set work item to 'done'...

Please approve the Purchase Requisition 2001000961

Description	Objects and attachments
Select one of the available decision options. This completes the processing of this step.	No attachments or objects exist

Before you make a decision, you can display the

Activate Windows  
Go to Settings to activate Windows

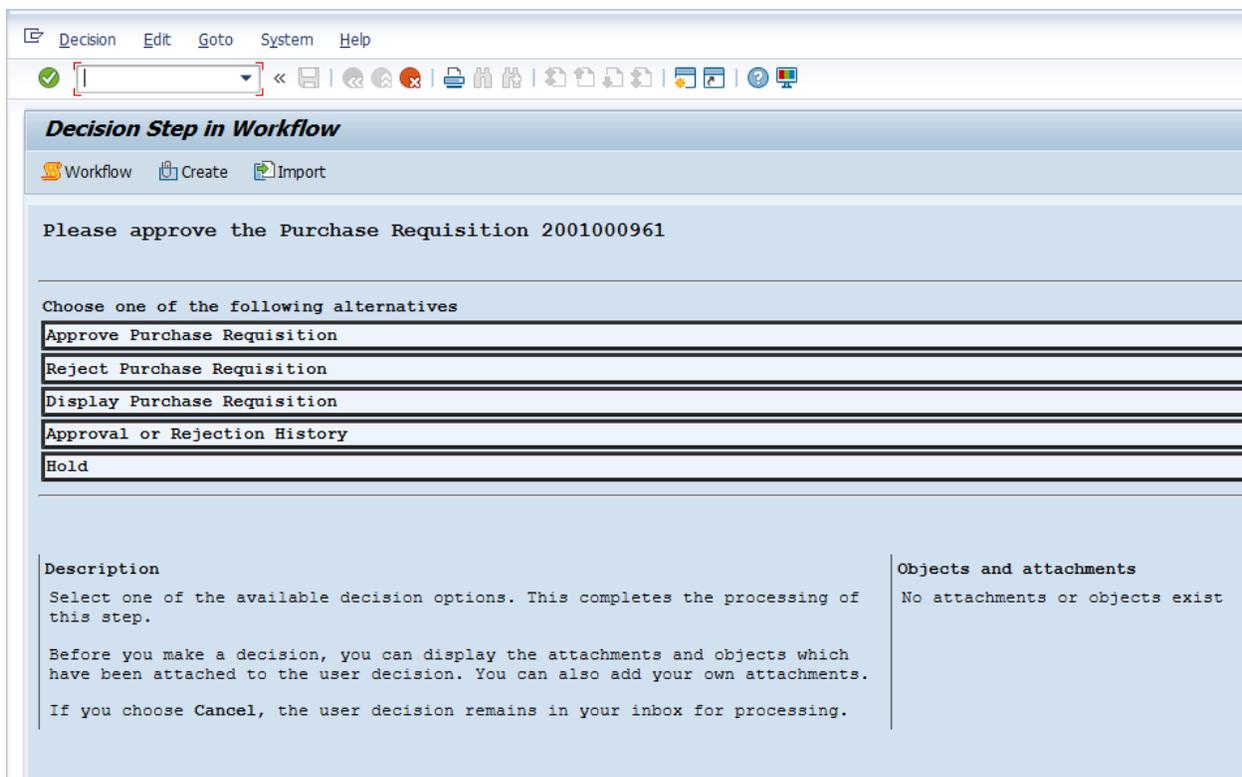


## SAP User Manual for Preventive Maintenance

Double Click on the “**Please Approve Purchase requisition 2002000961**” message. It will open the Purchase requisition document in Display mode.

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

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



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:

- Workflow navigation buttons: Workflow, Create, Import
- Message: Please approve the Purchase Requisition 2001000961
- Instruction: Choose one of the following alternatives
- Decision options (radio buttons):
  - Approve Purchase Requisition
  - Reject Purchase Requisition
  - Display Purchase Requisition
  - Approval or Rejection History
  - Hold
- Description: 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.
- Objects and attachments: No attachments or objects exist

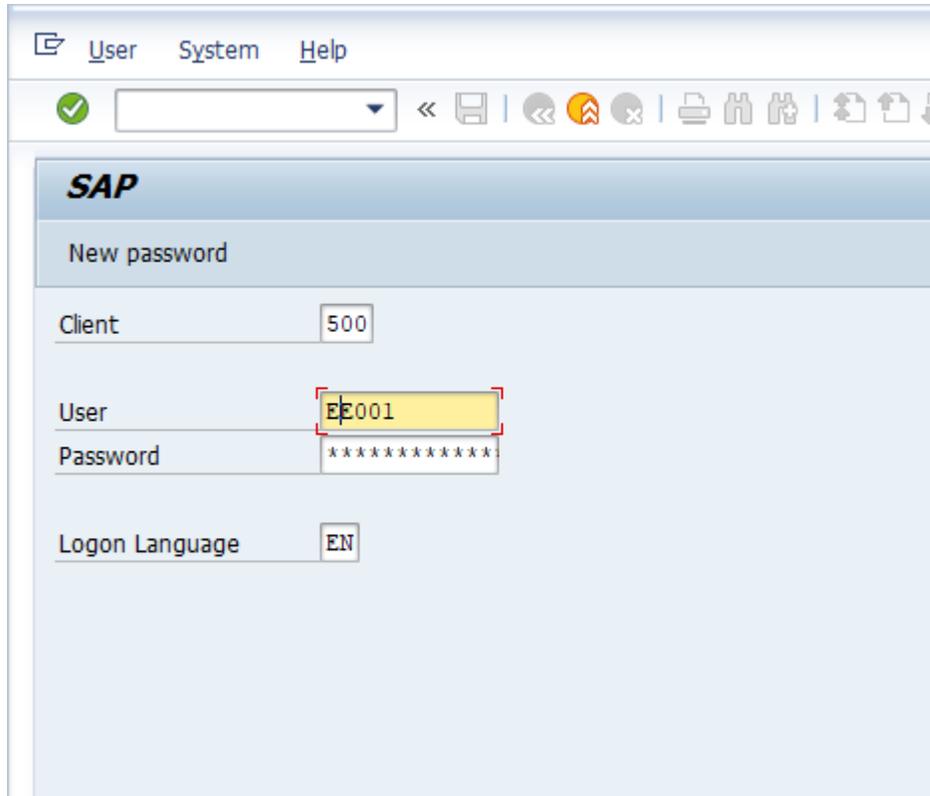
Purchase Requisition will be approved with level 1.

Purchase Requisition Approval Request notification is forwarded to Approver 2



## SAP User Manual for Preventive 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 area is titled 'SAP' and contains a 'New password' section. The login fields are as follows:

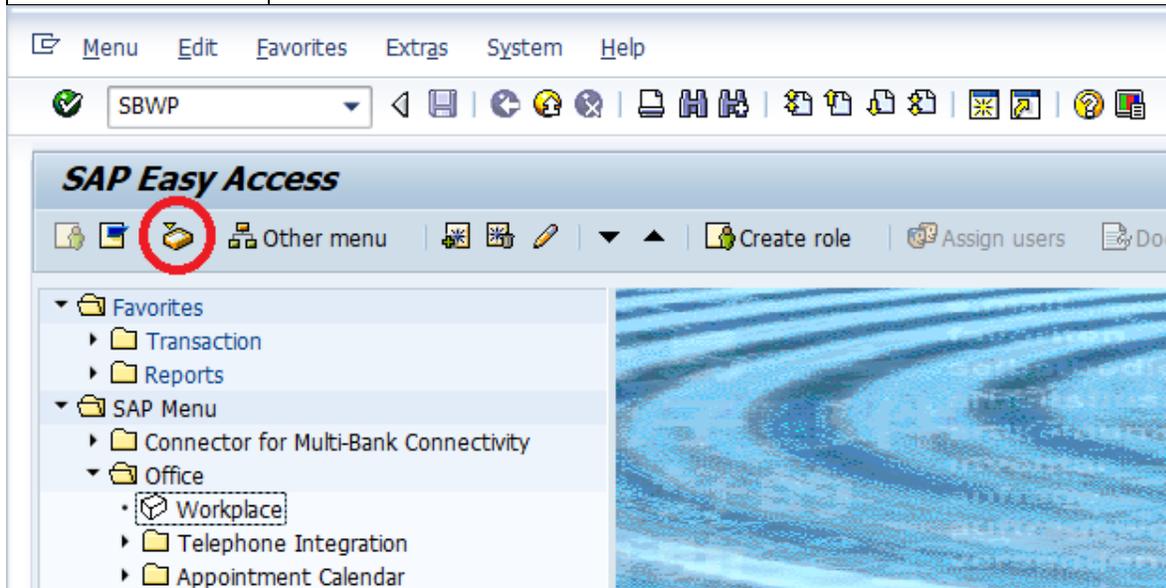
Client	500
User	EE001
Password	*****
Logon Language	EN

## SAP User Manual for Preventive 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 Preventive Maintenance

Expand “Inbox” button, under workflow “Approve Purchase requisition 2002000961” message will appear.

Ex.	Title	Status	Work Item ID	Creation Da.	Creation Time	P	At.	Co.	W.	Dynamic column
	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		415259	19.07.2020	15:05:51	5				
	Please approve the Purchase Requisition 2001000959		415258	19.07.2020	15:05:51	5				
	Please approve the Purchase Requisition 2001000958		415228	17.07.2020	10:00:27	5				
	Please approve the Purchase Requisition 2001000959		415227	17.07.2020	09:59:48	5				
	Please approve the Purchase Requisition 2001000959		414370	17.07.2020	09:58:25	5				
	Please approve the Purchase Requisition 2001000958		414369	17.07.2020	09:57:56	5				
	Please approve the Purchase Requisition 2001000932		412260	03.07.2020	16:48:52	5				
	Please approve the Purchase Requisition 2001000932		412259	03.07.2020	16:48:04	5				

Double Click on the “Please Approve Purchase requisition 2002000961” 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 Preventive Maintenance

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

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:

- Workflow navigation buttons: Workflow, Create, Import.
- Message: Please approve the Purchase Requisition 2001000961.
- Section: Choose one of the following alternatives.
- List of alternatives:
  - Approve Purchase Requisition
  - Reject Purchase Requisition
  - Display Purchase Requisition
  - Approval or Rejection History
  - Hold
- Two columns of text:
  - Description:** 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.
  - Objects and attachments:** No attachments or objects exist.

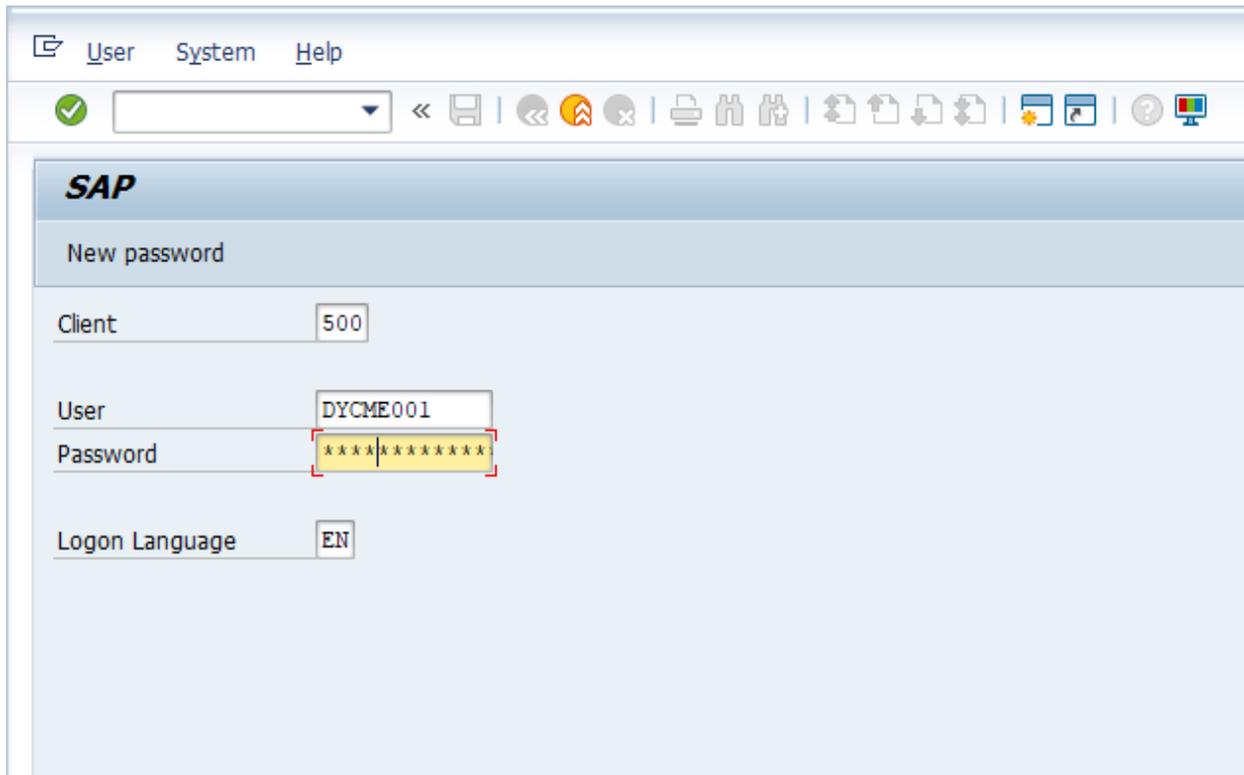
Purchase Requisition will be approved with level 2.

Purchase Requisition Approval Request notification is forwarded to Approver 3.



## SAP User Manual for Preventive 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 a 'New password' section. Below this, there are four input fields: 'Client' with the value '500', 'User' with the value 'DYCME001', 'Password' with a masked value '\*\*\*\*\*', and 'Logon Language' with the value 'EN'. The password field is highlighted with a red border.

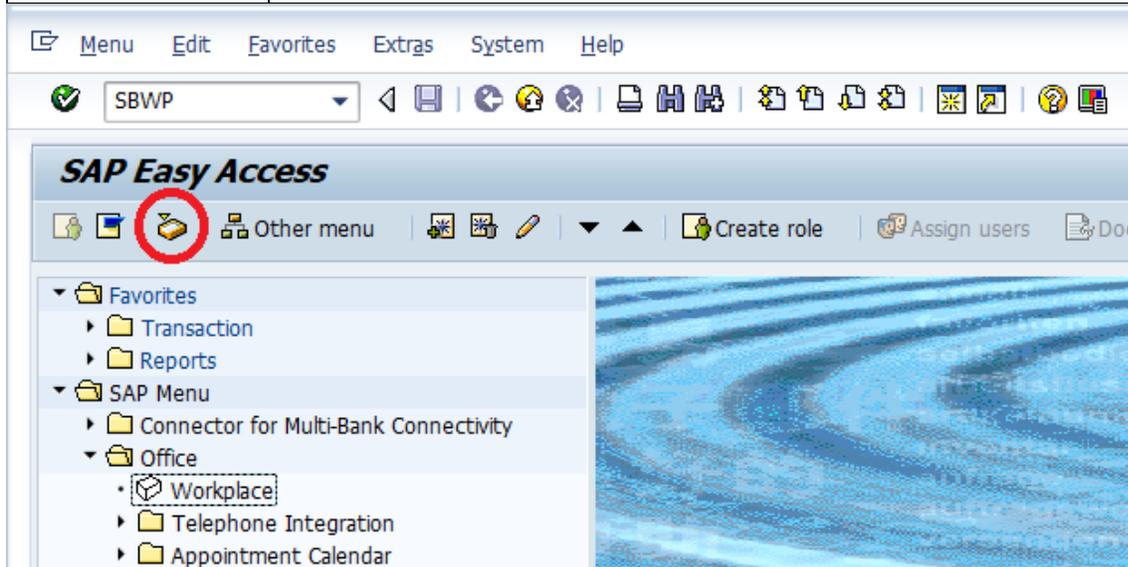


## SAP User Manual for Preventive Maintenance

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 Preventive Maintenance

Expand “Inbox” button, under workflow “Approve Purchase requisition 2002000961” message will appear.

Ex.	Title	Status	Work Item ID	Creation Da.	Creation Time	P	At.	Co.	W.	Dynamic column
	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		415259	19.07.2020	15:05:51	5				
	Please approve the Purchase Requisition 2001000959		415258	19.07.2020	15:05:51	5				
	Please approve the Purchase Requisition 2001000958		415228	17.07.2020	10:00:27	5				
	Please approve the Purchase Requisition 2001000959		415227	17.07.2020	09:59:48	5				
	Please approve the Purchase Requisition 2001000959		414370	17.07.2020	09:58:25	5				
	Please approve the Purchase Requisition 2001000958		414369	17.07.2020	09:57:56	5				
	Please approve the Purchase Requisition 2001000932		412260	03.07.2020	16:48:52	5				
	Please approve the Purchase Requisition 2001000932		412259	03.07.2020	16:48:04	5				

Double Click on the “Please Approve Purchase requisition 2002000961” 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 Preventive Maintenance

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

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 bar is a toolbar with various icons. The main content area is titled 'Decision Step in Workflow' and contains the following elements:

- A 'Workflow' button, a 'Create' button, and an 'Import' button.
- A message: 'Please approve the Purchase Requisition 2001000961'.
- A section titled 'Choose one of the following alternatives' with a list of options:
  - Approve Purchase Requisition
  - Reject Purchase Requisition
  - Display Purchase Requisition
  - Approval or Rejection History
  - Hold
- A 'Description' section with the text: '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 with the text: 'No attachments or objects exist'.

Purchase Requisition will be approved with level 3.

Purchase Requisition Approval Request notification is forwarded to Approver 4.



## SAP User Manual for Preventive 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 area is titled 'SAP' and contains a 'New password' section. The login fields are as follows:

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

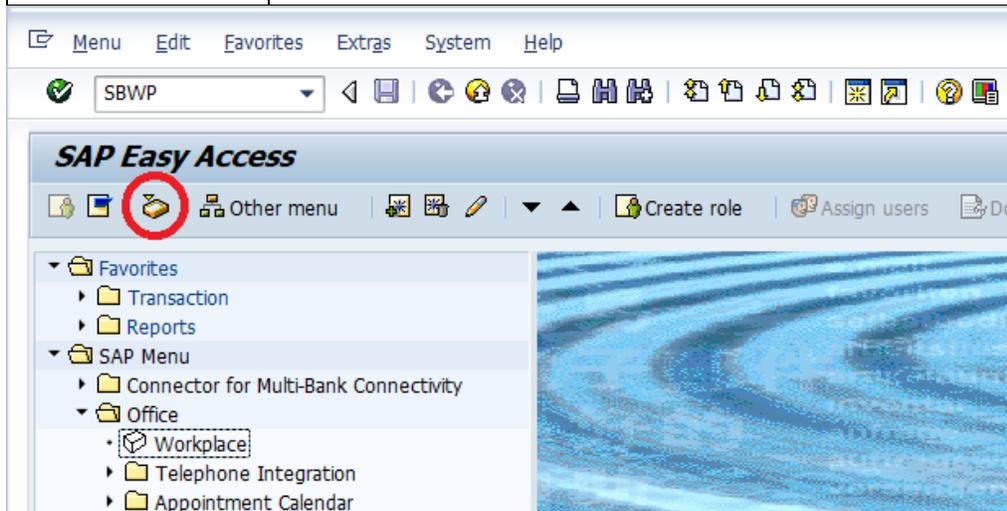
A red arrow points to the Client field.

## SAP User Manual for Preventive 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 Preventive Maintenance

Expand “Inbox” button, under workflow “Approve Purchase requisition 2002000961” message will appear.

The screenshot shows the SAP inbox interface. On the left, the 'Inbox' folder is expanded, showing a 'Workflow 26' task. The main area displays a table of workflow items:

Ex.	Title	Status	Work Item ID	Creation Da...	Creation ...	P	At...	Co...	W...	Dynamic columr
1	Please approve the Purchase Requisition 2001000961	✓	415262	19.07.2020	15:10:39	5				
2	Please approve the Purchase Requisition 2001000961	✓	415261	19.07.2020	15:10:16	5				
3	Please approve the Purchase Requisition 2001000959	✓	415260	19.07.2020	15:10:03	5				
4	Please approve the Purchase Requisition 2001000959	✓	414485	19.07.2020	15:07:07	5				
5	Please approve the Purchase Requisition 2001000959	✓	414484	19.07.2020	15:06:38	5				
6	Please approve the Purchase Requisition 2001000959	✓	415259	19.07.2020	15:05:51	5				
7	Please approve the Purchase Requisition 2001000959	✓	415258	19.07.2020	15:05:51	5				
8	Please approve the Purchase Requisition 2001000958	✓	415228	17.07.2020	10:00:27	5				
9	Please approve the Purchase Requisition 2001000959	✓	415227	17.07.2020	09:59:48	5				
10	Please approve the Purchase Requisition 2001000959	✓	414370	17.07.2020	09:58:25	5				
11	Please approve the Purchase Requisition 2001000958	✓	414369	17.07.2020	09:57:56	5				
12	Please approve the Purchase Requisition 2001000932	✓	412260	03.07.2020	16:48:52	5				
13	Please approve the Purchase Requisition 2001000932	✓	412259	03.07.2020	16:48:04	5				

Below the table, a task description is visible:

**Please approve the Purchase Requisition 2001000961**

Description	Objects and attachments
Select one of the available decision options. This completes the processing of this step.	No attachments or objects exist

Before you make a decision, you can display the

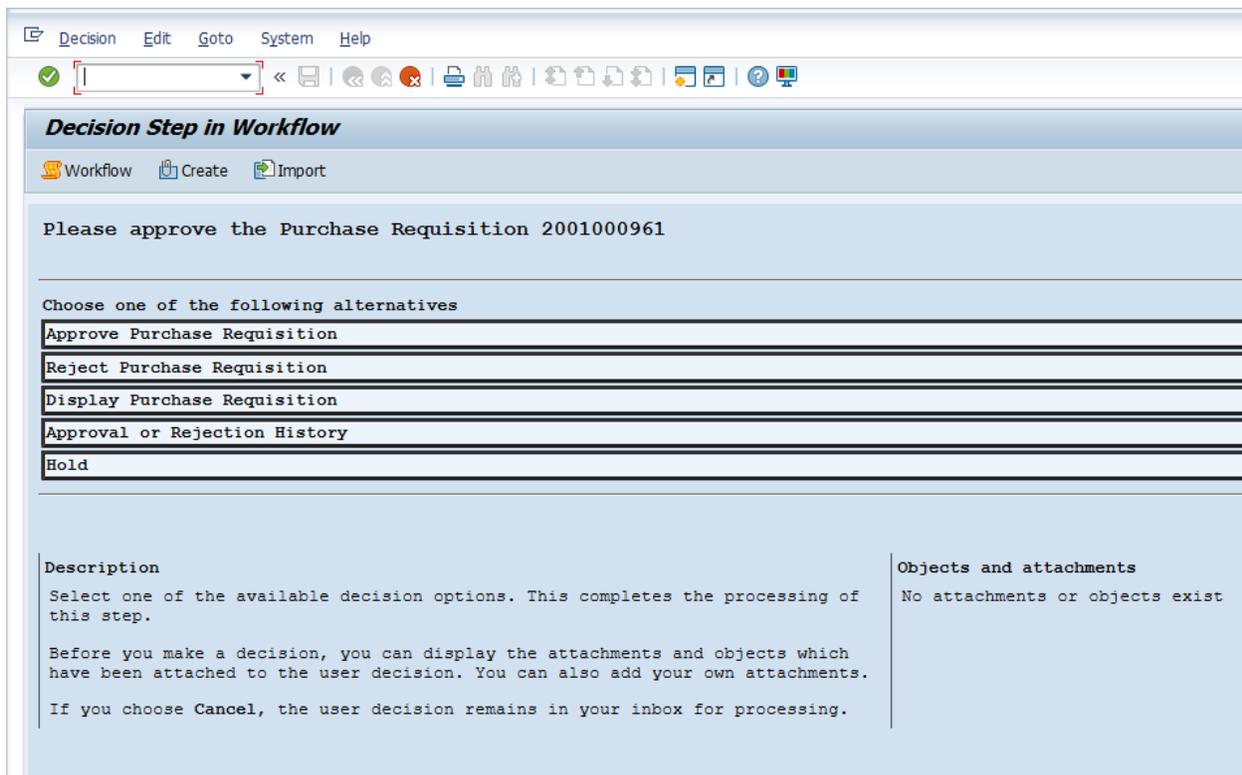


## SAP User Manual for Preventive Maintenance

Double Click on the “**Please Approve Purchase requisition 2002000961**” message. System will open the Purchase requisition document in Display mode.

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

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



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 Requisition 2001000961'.
- A section titled 'Choose one of the following alternatives' with a list of options: 'Approve Purchase Requisition', 'Reject Purchase Requisition', 'Display Purchase Requisition', 'Approval or Rejection History', and 'Hold'.
- A 'Description' section with text: '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 with text: 'No attachments or objects exist'.

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 Preventive Maintenance

Enter T Code ME53N to display the Purchase Requisition system shows that PR is approved by all levels

The screenshot shows the SAP ME53N 'Display Purchase Req.' interface. The document number is 2001000961. The release strategy is A1. A table shows the release strategy levels:

Code	Description	Stat...
A1	Level 1	✓
A2	Level 2	✓
A3	Level 3	✓
A4	Level 4	✓

The table below shows the purchase requisition details:

St...	Item	A	I	Material	Short Text	Quantity	Unit	C	Delivery Date	Val.	Price P...	Matl Group	Available Qty in Stock	Plant	Stor. Loc.	PGr	Requisnr.
	10	F	D		Preventive Maint by Exter...	1	AU	D	24.09.2020	160.00...	1	Constructo...	0.000	Mumbai Port ...		101	MP006112...

The item is [10] Preventive Maint by External Vendor. The requisitioner is MP00611268. The purchase group is 101 Material Mgmt.



## SAP User Manual for Preventive Maintenance

### SRM Tendering Activity Script

#### 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 Preventive Maintenance



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

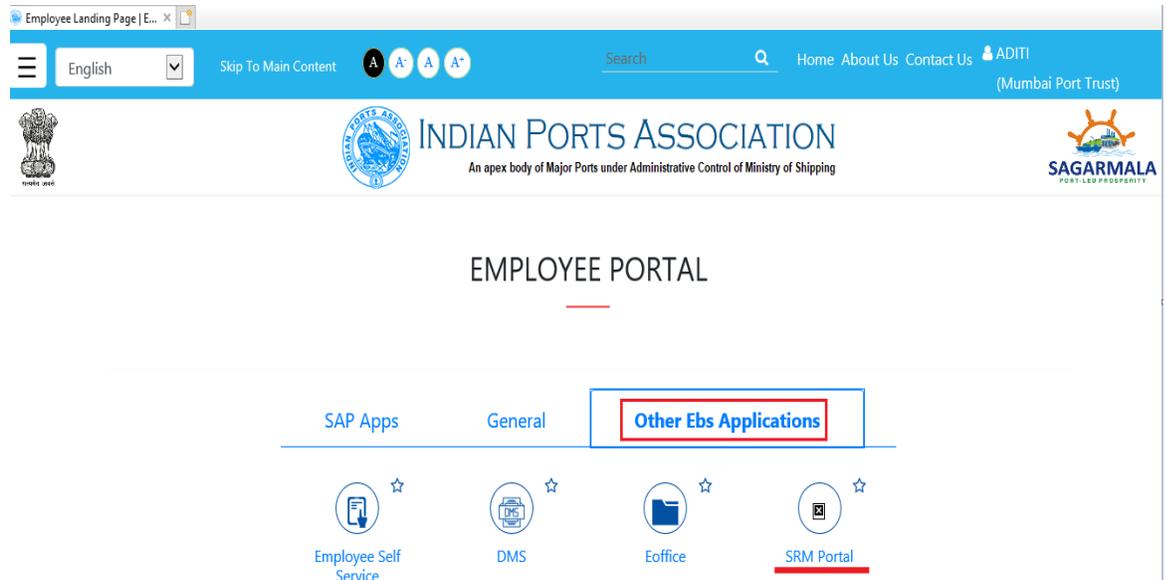
Input the OTP and click on “Verify OTP” button. Please see screenshot below.





## SAP User Manual for Preventive Maintenance

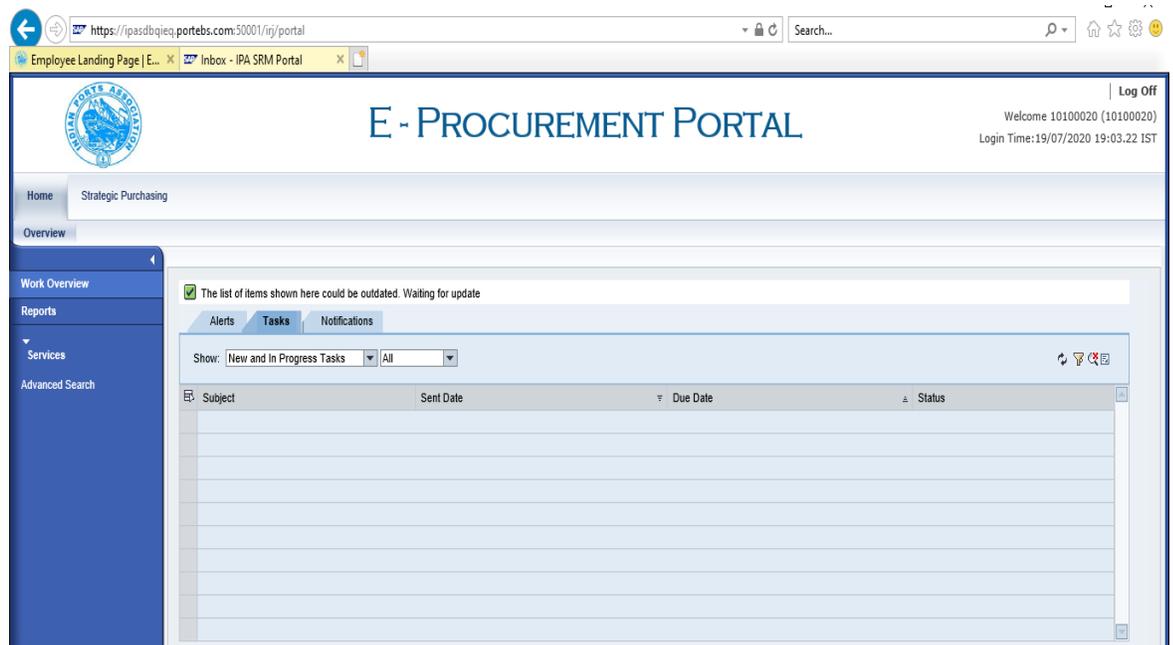
Once system verifies the OTP a new window will be displayed. Select “Other EBS Application” tab and click on “SRM Portal” link. Please see screenshot below.



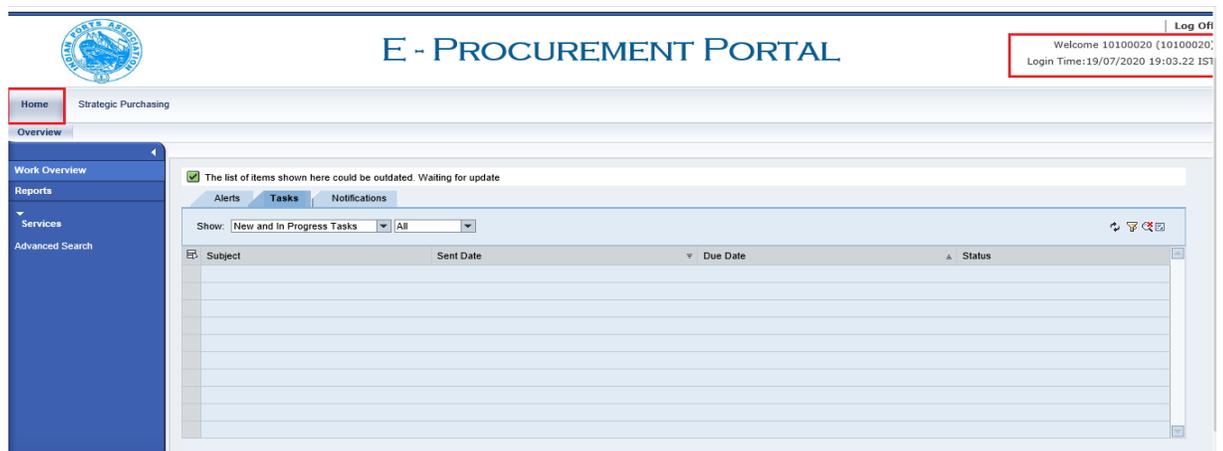


## SAP User Manual for Preventive Maintenance

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.



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.





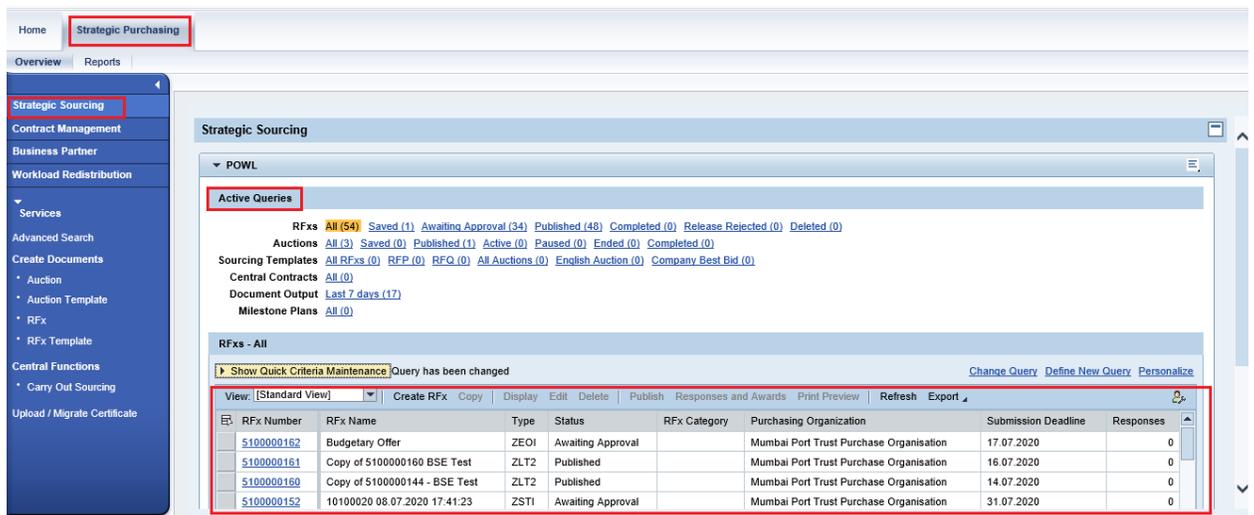
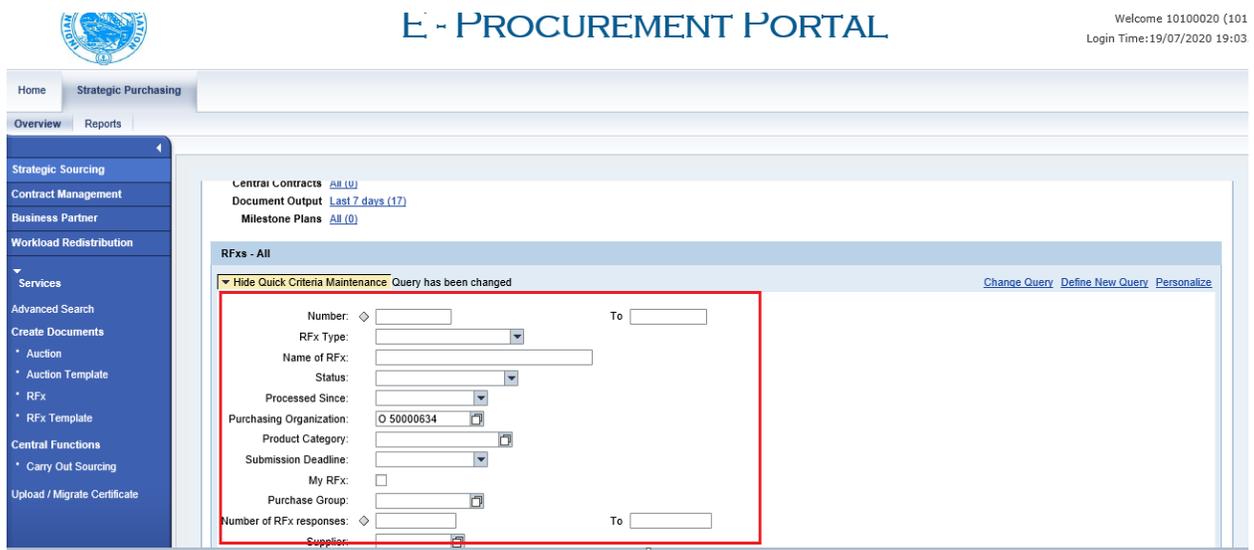
# SAP User Manual for Preventive Maintenance

## 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.



## SAP User Manual for Preventive 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**.

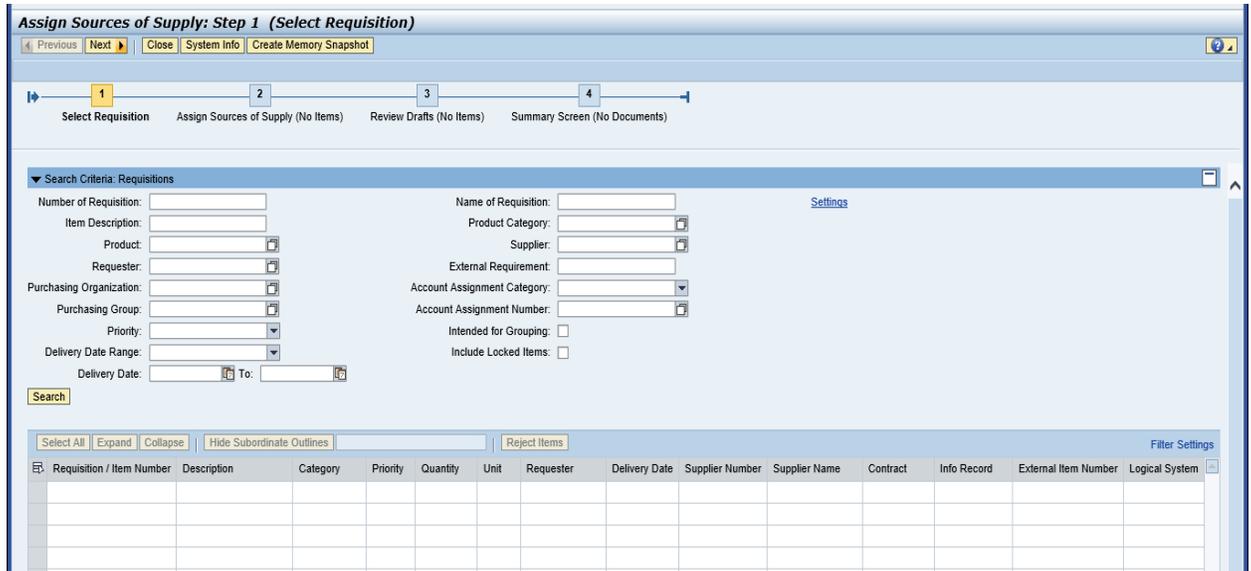
Please see the screenshot below.



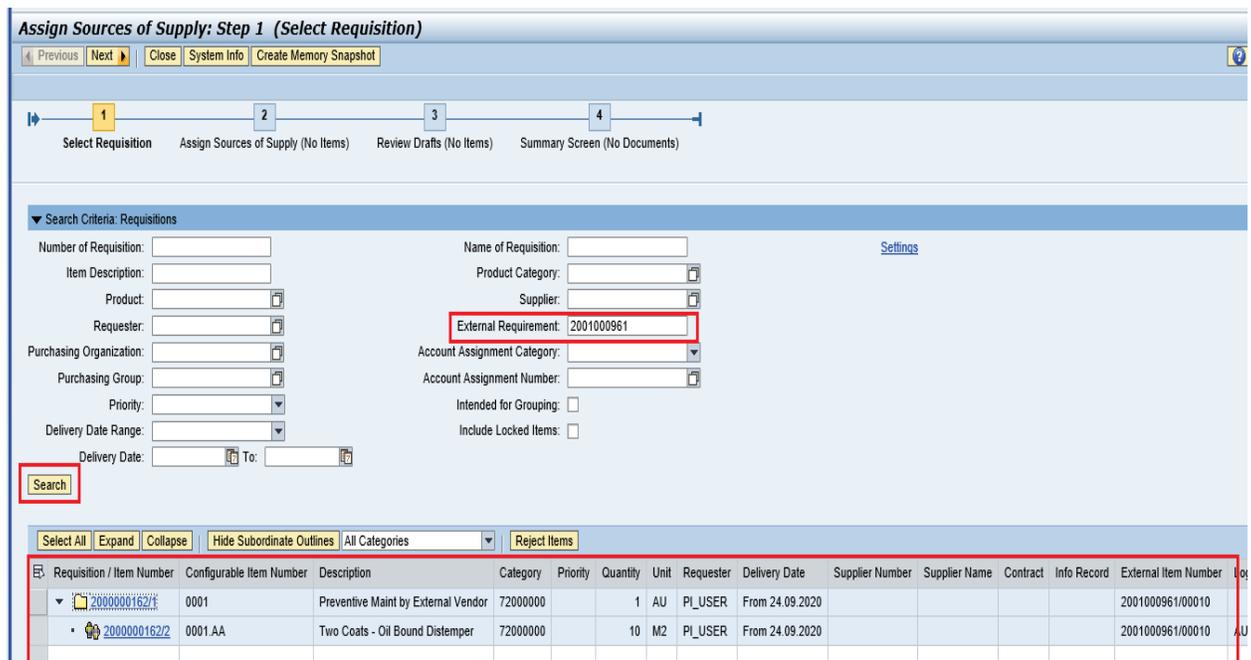
A new window will get displayed as shown below. This is the first step of searching the Purchase requisitions. There are various search criteria's provided through which you can search the purchase requisitions.



# SAP User Manual for Preventive 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



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



## SAP User Manual for Preventive Maintenance

**Assign Sources of Supply: Step 1 (Select Requisition)**

Navigation: Previous, **Next**, Close, System Info, Create Memory Snapshot

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

**Search Criteria: Requisitions**

Number of Requisition:  Name of Requisition:  [Settings](#)

Item Description:  Product Category:

Product:  Supplier:

Requester:  External Requirement: 2001000961

Purchasing Organization:  Account Assignment Category:

Purchasing Group:  Account Assignment Number:

Priority:  Intended for Grouping:

Delivery Date Range:  Include Locked Items:

Delivery Date:  To:

**Search**

Buttons: Select All, Expand, Collapse, Hide Subordinate Outlines, All Categories, Reject Items

Requisition / Item Number	Configurable Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Contract	Info Record	External Item Number
2000000162/1	0001	Preventive Maint by External Vendor	72000000		1	AU	PL_USER	From 24.09.2020					2001000961/00010

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.

**Assign Sources of Supply: Step 2 (Assign Sources of Supply ( 1 Items))**

Navigation: Previous, **Next**, Save, Close, System Info, Create Memory Snapshot

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

Buttons: Select All, Expand All, Collapse All, Change, Refresh, Propose Sources of Supply, **Create Draft**, Replace Item with Catalog Item, Undo Replacement, Submit to Grouping, Remove, Assign to My Purchasing Group

Requisition / Item Number	External Item Number	Configurable Item Number	Description	Variant	Category Description	Priority	Quantity	Unit	Delivery Date	Supplier Number	Supplier Name	Contract	Contract I
2000000162/1	2001000961	0001	Preventive Maint by External Vendor		Construction Service		1	AU	From 24.09.2020				



## SAP User Manual for Preventive Maintenance

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

From the drop down list select “ZSTI – Single Tender” option.

Carry Out Sourcing - IPA SRM Portal - Internet Explorer  
https://ipasdqieq.portebs.com:50001/irj/portal?NavigationTarget=ROLES%3A%2F%2Fportal\_content%2Fcom.ipa.IPA\_Content%2Fcom.ipa.Portal\_Roles%2Fcom.ipa.ro\_strategicpurchaser%2Ffl\_strategic\_purch%2Ffl\_overview%2Fcom.sap.pct.srm.core

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

Created Drafts

Change Selected Draft To Remove

Draft Name	Draft Type	Supplier Number	Supplier	Transaction Type
10100020 19.07.2020 19:54:38	Bid Invitation			ZAT1 : Adv/Opn Tender 1 Env ZAT2 : Adv/Opn Tender 2 Env ZEO1 : EOI/Budgetary offer ZLT1 : Limited Tender 1 Env ZLT2 : Limited Tender 2 Env <b>ZST1 : Single Tender</b>

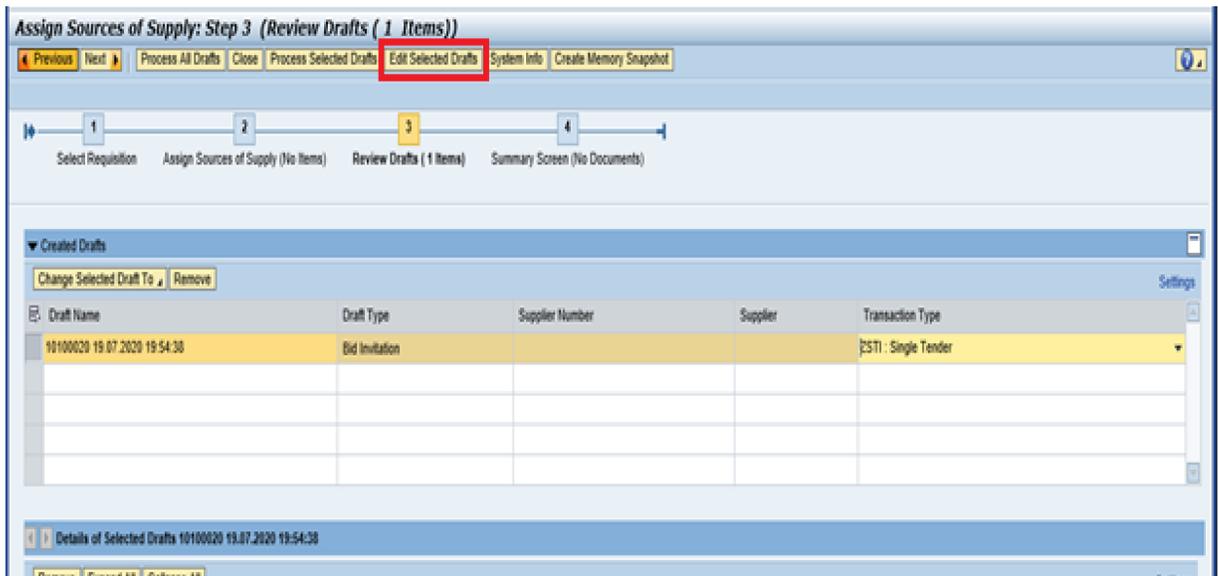
Details of Selected Drafts 10100020 19.07.2020 19:54:38

Remove Expand All Collapse All

Requisition / Item Number	Configurable Item Number	Description	Category	Quantity	Unit	Info Record	Net Price	Gross Price	Currency
2000000162 / 1	0001	Preventive Maint by External Vendor	72000000	1	AU			0.00	INR

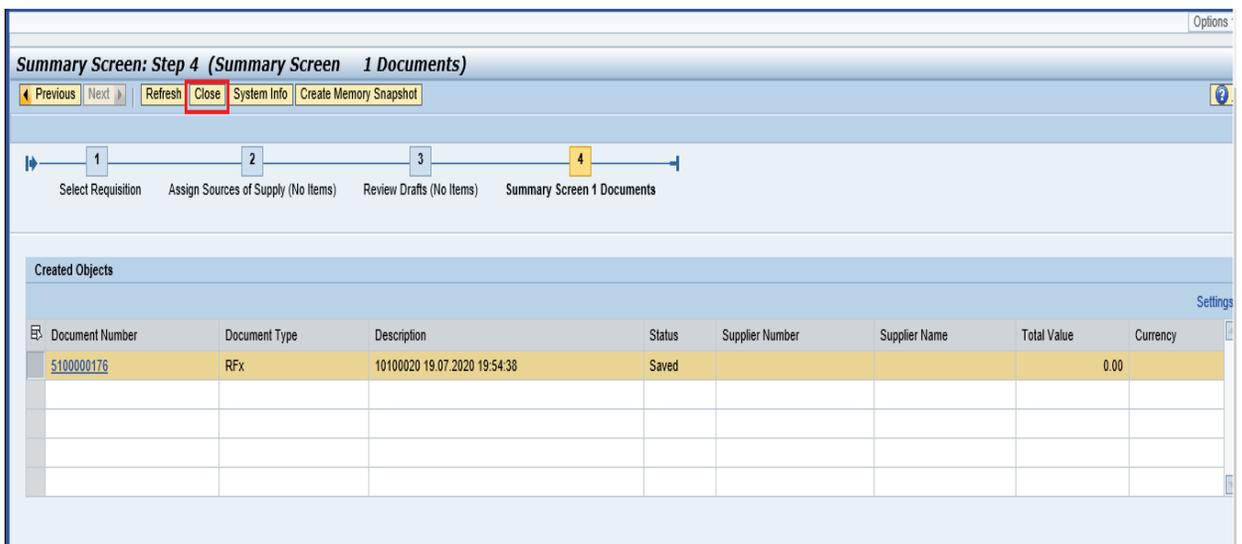
## SAP User Manual for Preventive Maintenance

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



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.





## SAP User Manual for Preventive Maintenance

### 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 Preventive Maintenance

The screenshot displays the SAP RFX Parameters screen. It includes a navigation bar with tabs like 'RFX Information', 'Bidders', 'Items', 'Notes and Attachments', 'Weights and Scores', 'Approval', and 'Tracking'. Below this, there are sub-tabs for 'RFX Parameters', 'Questions', and 'Notes and Attachments'. The main area is divided into several sections:
 

- Identification:** Fields for RFX Name (10100020 19.07.2020 19:54:38), Port Tender No., Tender Description, RFX Type (Single Tender), and Publication Type (Restricted RFX).
- Event Parameters:** Fields for 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), and Display Weighting to Bidders (unchecked).
- Organization:** Fields for Purchasing Organization (Mumbai Port Trust Purchase Organisation) and Purchasing Group (Material Mgmt Purchase Group).
- Dates:** Fields for RFX Start Date, RFX Submission Date, Price Rfx Opening Date, Technical RFX Response Opening Date, End of Binding Period, and Valid From / To.
- Tender Fee:** Fields for Tender Fee, Earnest Money Deposit, and Reason for EMD Exclusion.
- Security Deposit:** Fields for Security Deposit Required and Security Deposit Percentage.

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>		



## SAP User Manual for Preventive Maintenance

Purchasing Organization	System defaulted	Non-Editable
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



## SAP User Manual for Preventive Maintenance

AMC Indicator	Is applicable for the AMC tenders. If checked TCR with ALR/AVR will be generated	Editable
QSBC	Currently not available	Editable
<b>Tender Fee</b>		
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



## SAP User Manual for Preventive Maintenance

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

The screenshot displays the 'Edit RFX' form in SAP. The form is divided into several sections:

- Identification:** Includes fields for RFX Name (10100020 19.07.2020 19.54.30), Part Tender No (MBPT00260T030), Tender Description (LONG TENDER DESCRIPTION. THIS TENDER TYPE IS USED FOR PROPRIETARY / OEM VENDORS. THIS FIELD IS OF 256 CHARACTERS), RFX Type (Single Tender), and Publication Type (Restricted RFX).
- Event Parameters:** Includes Currency (INR), Target Value (100,000.00 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), and Display Weighting to Bidders (unchecked).
- Organization:** Includes Purchasing Organization (Mumbai Port Trust Purchase Organization) and Purchasing Group (Material Mgmt Purchase Group).
- Dates:** Includes RFX Start Date (19.07.2020 22:05:00), RFX Submission Date (19.07.2020 22:49:00), Price Rfx Opening Date (19.07.2020 22:49:00), Technical Rfx Response Opening Date (19.07.2020 22:49:00), End of Bidding Period, and Valid From / To (19.07.2020 - 17.10.2020).
- Tender Fee:** Includes Required (checked), Tender Fee Percentage (5), Tender Fee (8,000.00 INR), and Submission Deadline (19.07.2020 22:20:00).
- Earnest Money Deposit:** Includes Required (checked), EMD Percentage (8), Amount (12,800.00 INR), and Submission Deadline (19.07.2020 22:20:00).
- Scenario Award/Contract:** Includes Pre-bid Meeting (checked), Pre-bid Meeting Required (checked), Pre-Bid Start Date (19.07.2020 22:00:00), Pre-Bid End Date (19.07.2020 22:05:00), Pre-Bid Location (ONLINE WEREX SESSION), and Pre-Bid Remarks (PLEASE ATTEND THE PRE-BID MEETING FOR ANY CLARIFICATIONS AND CORRECTIONS REQUIRED IN THE TENDER).

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



# SAP User Manual for Preventive Maintenance

**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

Please add atleast one Bidder to Rfx  
 Please maintain Rfx Parameter !!!  
 No permissions maintained for price opener  
 No permissions maintained for technical opener  
 No permissions maintained for technical opener

Rfx Number 5100000176 Rfx Name 10100020 19.07.2020 19:54:38 Type Single Tender Status Saved Created On 19.07.2020 19:56:18 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 19.07.2020 19:54:38  
 Port Tender No: MBPT/2020/07/230  
 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:   
 Allow Multiple Rfx Responses for Each Company:   
 Display Weighting to Bidders:   
 AMC Indicator:   
 OSBC:

**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: 10

**Dates**  
 Required:

## Bidders Tab

Under the “Bidders” tab, Buyer would be able to add the bidder id. Buyer can either provide the Bidder id directly and then click on “Add” button.

Buyer also can click on “Search for Bidder” button to search the Bidders to be invited for the tendering activity.

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

▼ Bidder Overview

Add Bidder by Company ID **4000442** **Add** Search for Bidders Send Notifications Output Medium Delete Settings

Company Name	Contact	Country	Company ID	Bidder Contact Person	Phone Number	Output Medium

▼ Bidder Currencies

\* Currency: INR Currency Conversion Date:

Following is a list of currencies that can be used by the bidders. You can add more currencies, delete currencies or set the main currency from the list.

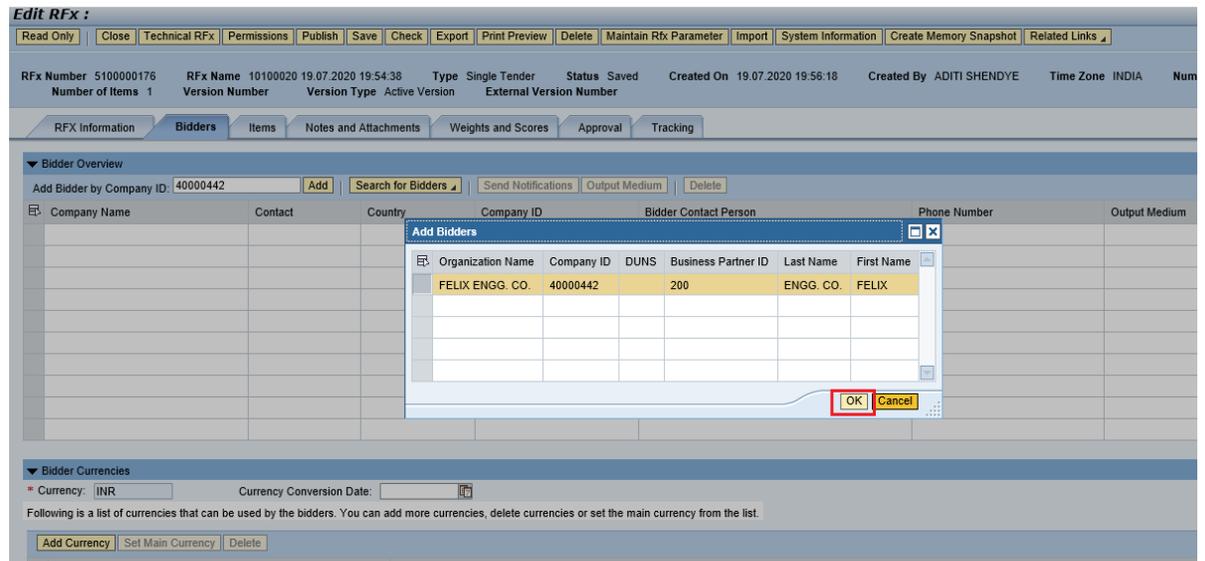
Add Currency Set Main Currency Delete Settings

Currency	Description
INR	Indian Rupee

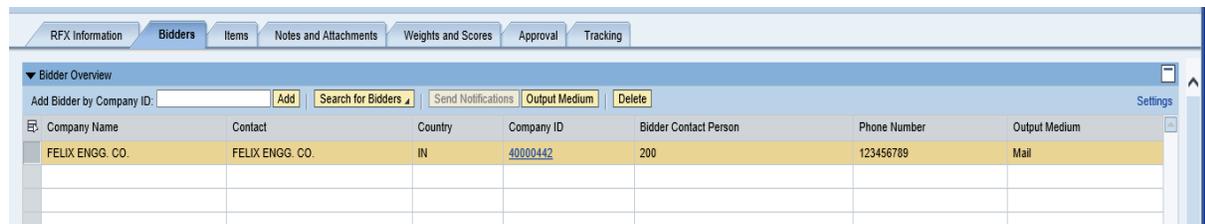


## SAP User Manual for Preventive Maintenance

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 Preventive Maintenance

**Display RFX:**

Please maintain Rfx Parameter !!!

RFX Number 5100000176    RFX Name 10100020 19.07.2020 19:54:38    Type Single Tender    Status Saved    Created On 19.07.2020 19:56:18    Created By ADITI SHENDYE    Tir  
 Number of Items 1    Version Number    Version Type Active Version    External Version Number

**Bidder Overview**

Company Name	Contact	Country	Company ID	Bidder Contact Person	Phone Number
FLUX ENGG CO	FLUX ENGG CO	IN	40000442	200	123456789

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.

m:50001/iri/portal?NavigationTarget=ROLES%3A%2F%2Fportal\_content%2Fcom.ipa.PA\_Content%2Fcom.ipa.Portal\_Roles%2Fcom.ipa.ro\_strategicpurchaser%2Ffl\_navi

http://ipasapqimq.portebs.com:8002/sap/bc/webdynpro/sap/zsrm\_tech\_q

Application to maintain Qu... x

**SAP**

Bid No: 5100000176

**Please maintain Question**

S.No	Group	Quest
1		
2		
3		
4		
5		
6		
7		
8		
9		
0		

Application to maintain Qu... x

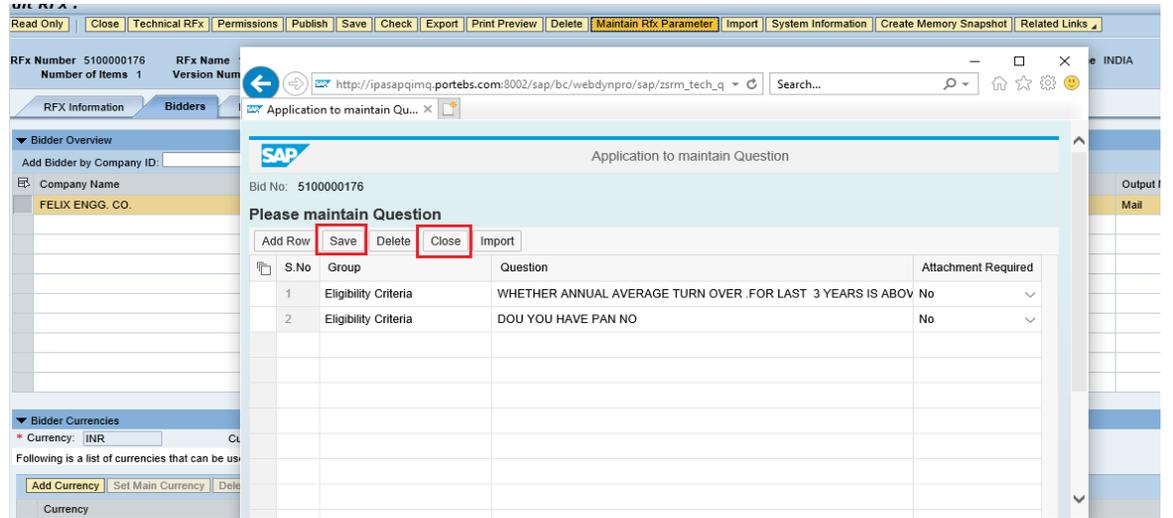
**SAP**

Please select data to be imported

Question	Group	Attachme
DO YOU HAVE PREVIOUS WORK EXPERIENCE. UPLOAD DOCUMENTS.	Eligibility Criteria	No
DOU YOU HAVE PAN NO	Eligibility Criteria	No
DOU 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
WHETHER ECS MANDATE FORM FILLED AND UPLOADED?	Eligibility Criteria	Yes
WHETHER EMD ATTACHED / PAID THROUGH GATEWAY?	Eligibility Criteria	No
WHETHER EXEMPTION CERTIFICATE SUBMITTED FOR NSIC / MSE?	Eligibility Criteria	Yes

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

## SAP User Manual for Preventive 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



## SAP User Manual for Preventive Maintenance

**Permissions**

RFX Name 10100020 19.07.2020 19:54:38 RFX No. 5100000176

Save Close Window

User Permission Assignment

Add Delete

User	Technical Opener	Tech Scrutiny	Price Opener	Technical Evaluator	Price Scrutiny	Price Evaluator	Bid Floor Admin
10100020	<input checked="" type="checkbox"/>	<input type="checkbox"/>					

User Details

User Name  Organization  Company   
Building  Room  Telephone

Security Deposit

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

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 Preventive Maintenance

The screenshot shows the SAP 'Permissions' window. It is divided into three main sections:

- User Permission Assignment:** 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 checkboxes for Technical Opener and Tech Scrutiny.
- User Details:** Fields for User Name, Building, Organization, Room, Company, and Telephone.
- Add User:** Fields for User Name (10100011), First Name, Last Name, and a Search button. Below this is another 'User Details' table with columns: First Name, Last Name, User ID, Person ID, Employee ID, E-Mail, Department, and Position Name. A row shows user SIDDHASANJAY APHALE with User ID 10100011.

Buttons for 'Save', 'Close Window', 'Add', 'Delete', 'Transfer', and 'Cancel' are visible.

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



## SAP User Manual for Preventive Maintenance

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

Permissions

RFx Name 10100020 19.07.2020 19:54:38 RFx No. 5100000176

Save Close Window

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="radio"/>
10100011	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
10100012	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
10100013	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
10100024	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
10100015	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
10100019	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
10100017	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>				

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 Preventive Maintenance

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

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

Item Overview

RFX Response Required for All Items  Bidder Can Add New Items  Allow RFX Response Modification  Bidder Can Change Quantities

Details Add Line Add Subline Cut Copy Paste Delete

Line Number	Item Type	Product ID	Description	Lot	Allow RFX Response Modification	Variant	Product Category	Quantity	Unit	Currency	Delivery Date	Notes	Attachments	Internal
1	Outline		Preventive Maint by External Vendor	<input checked="" type="checkbox"/>	<input type="checkbox"/>		72000000	1	AU	INR	24.09.2020	0	0	1
2	Service	8300000085	Two Coats - Oil Bound Distemper	<input type="checkbox"/>	<input type="checkbox"/>		72000000	10	M2	INR	24.09.2020	0	0	2

Item : Two Coats - Oil Bound Distemper

Item Data Questions Notes and Attachments

Identification

Control Key: Service functional  
 Item Type: Service  
 Product ID: 8300000085  
 Description: Two Coats - Oil Bound Distemper  
 Product Category: 72000000 Construction Service  
 Lot:   
 Allow RFX Response Modification:   
 Further Properties  
 Variant: Alternative not allowed

Currency, Values and Pricing

Currency: INR  
 Quantity/Unit: 10 M2

Service and Delivery

Delivery Date: From 24.09.2020

## 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.

Display RFX:

Edit Close Technical RFX Copy Check Export Print Preview Maintain Rfx Parameter System Information Create Memory Snapshot Related Links

RFX Number 510000176 RFX Name 10100020 19.07.2020 19:54:38 Type Single Tender Status Saved Created On 19.07.2020 19:56:18 Created By ADITI SHENDYE Time Zone INDIA Number of Suppliers 1

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

Current Status: Initial Header Approval Note

Current Process Step:

Currently Processed By:

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	Status	Processor	Received On	Processed On	Forwarded By
001	SRM RFX Completion	Open (No Decision Made)	MANDAR PARKAR			
002	SRM RFX Completion	Open (No Decision Made)	RAMESH SUBRAMANIAN			
003	SRM RFX Completion	Open (No Decision Made)	GANGADHAR YEDDY			

Reviewer(s) for the Document



## SAP User Manual for Preventive 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.

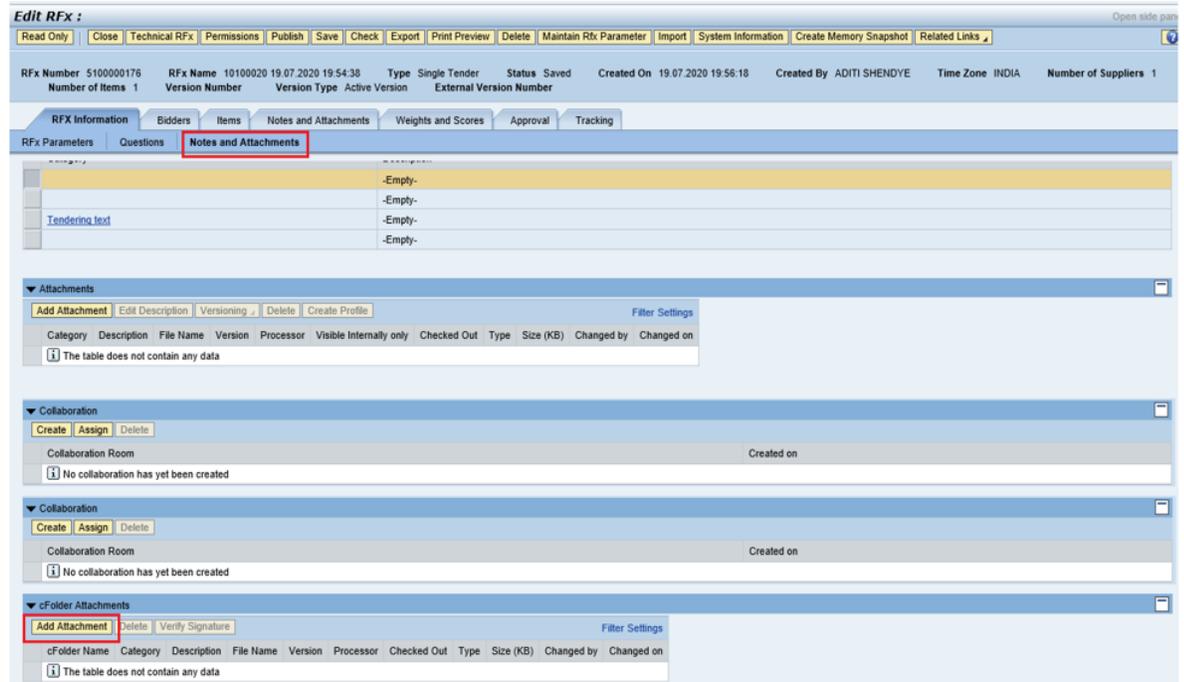
C-Folder		
Folder	Folder Description	Used By
External Area	Contains documents that are to be shared with the RFx respondents. NIT document has to be uploaded in the this area.	Buyer/Tender Creator
Collaboration	Used by RFx respondents and evaluators to exchange information, for example, the RFx respondents 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

Please see the screenshot below.

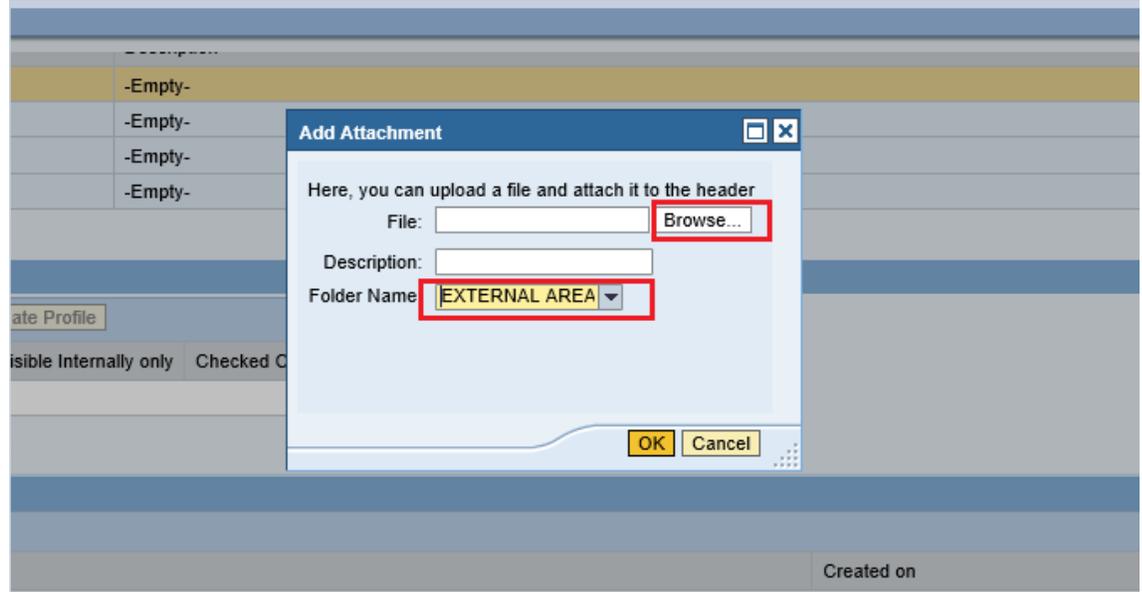


## SAP User Manual for Preventive Maintenance

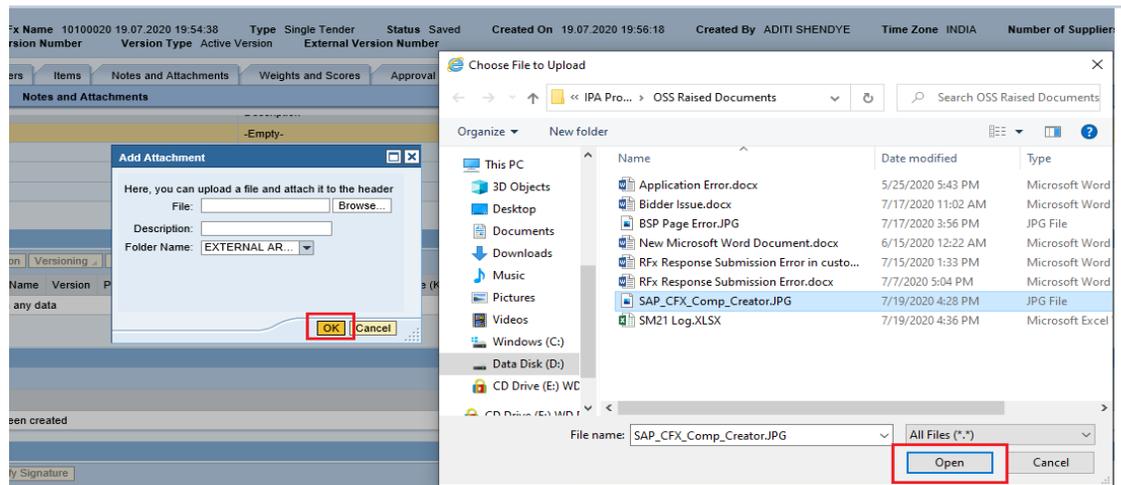


A new window will be displayed and system prompts to select the folder in which the document has to be uploaded. Select “External Area” and then click on “Browse” button as shown in the screenshot below.

## SAP User Manual for Preventive Maintenance

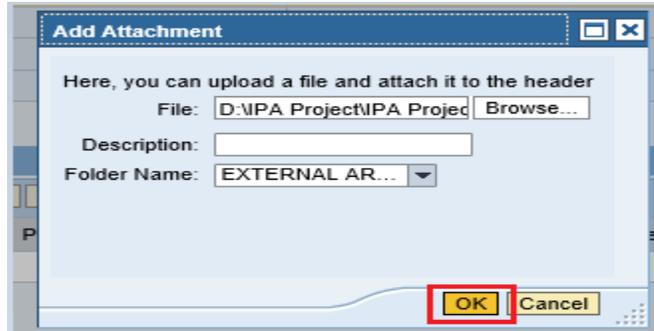


Select the document from the respective folder on your PC/Laptop and then click on the “Open” button.

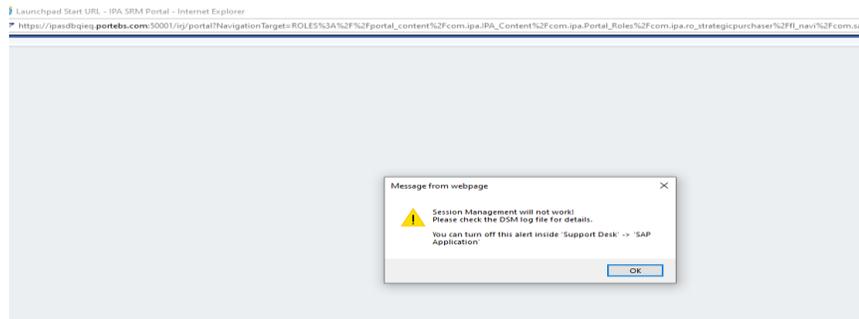


Once the file is uploaded the screen will be displayed as below. Click on “Ok” button to proceed further.

## SAP User Manual for Preventive 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.

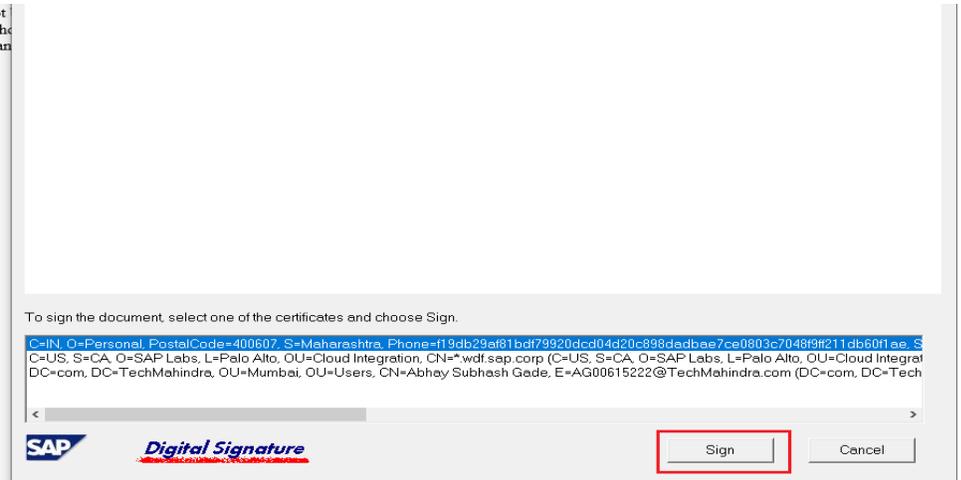


Another window will be prompted, where the buyer needs to select the correct digital signature and then click on “Sign” button.



## SAP User Manual for Preventive Maintenance

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

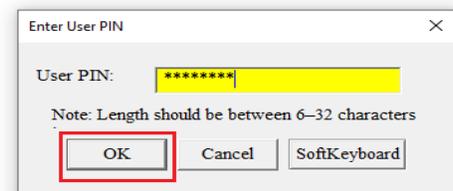


Enter the password in the window prompted and then click on “Ok” button.

### 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.



## SAP User Manual for Preventive Maintenance



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 needs to be digitally signed by the Buyer.

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

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

Clear

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

▼ Attachments

Add Attachment Edit Description Versioning Delete Create Profile Filter Settings

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
The table does not contain any data										

Collaboration

▼ cFolder Attachments

Add Attachment Delete Verify Signature Filter Settings

cFolder Name	Category	Description	File Name	Version	Processor	Checked Out	Type	Size (KB)	Changed by	Changed on
EXTERNAL AREA	Standard Attachment	SAP_CFX_Comp_Creator	SAP_CFX_Comp_Creator.JPG.sig	1		<input type="checkbox"/>	sig	49	10100020	20.07.2020
COLLABORATION	Standard Attachment	COLLABORATION DOCUMENT	New Microsoft Word Document.docx.sig	1		<input type="checkbox"/>	sig	166	10100020	20.07.2020





## SAP User Manual for Preventive 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

RFX is complete and contains no errors

RFX Number	5100000176	RFX Name	10100020 19.07.2020 19:54:38	Type	Single Tender	Status	Saved	Created On	19.07.2020 19:56:18	Created By	ADITI SHENDYE	Time Zone	INDIA	Number of Suppliers	1
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

RFX Type: Single Tender  
Publication Type: Restricted RFX

Allow Multiple RFX Responses for Each Company:   
Display Weighting to Bidders:  QSBC:

**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: 10

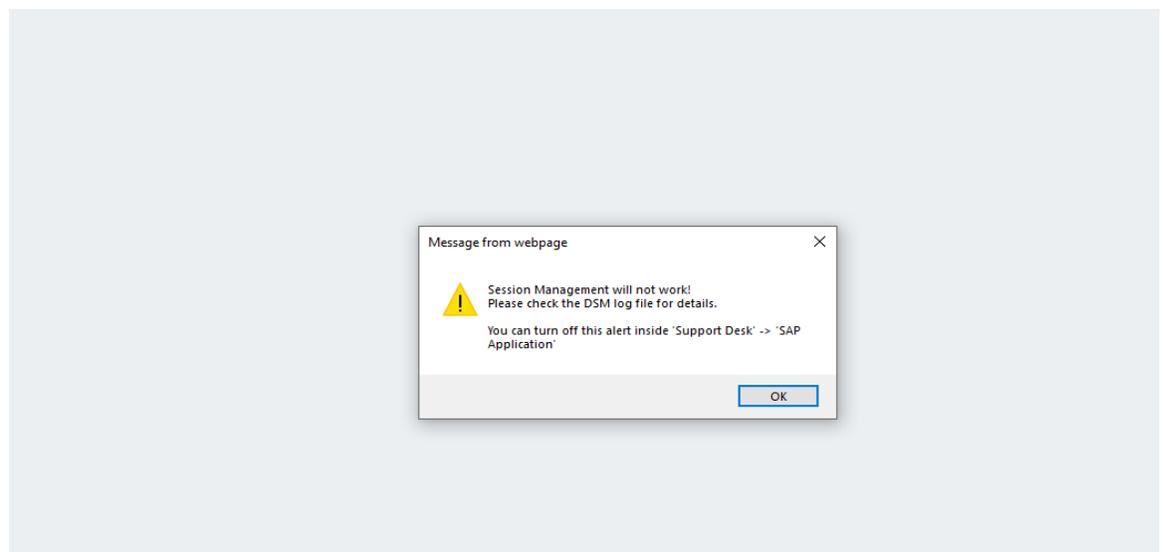
**Dates**  
RFX Start Date: 20.07.2020 11:50:00  
\* RFX Submission Date: 20.07.2020 13:00:00  
Price Rfx Opening Date: 20.07.2020 13:00:00  
Technical RFX Response Opening Date: 20.07.2020 13:00:00  
End of Binding Period:  
Valid From / To: 20.07.2020 - 18.10.2020

Required:   
Tender Fee Percentage: 5  
\* Tender Fee: 8,000.00 INR  
Submission Deadline: 20.07.2020 12:30:00

**Earnest Money Deposit**  
Required:   
EMD Percentage: 8  
\* Amount: 12,000.00 INR  
Submission Deadline: 20.07.2020 12:30:00

Scenario Award/Contract  
Pre-bid Meeting

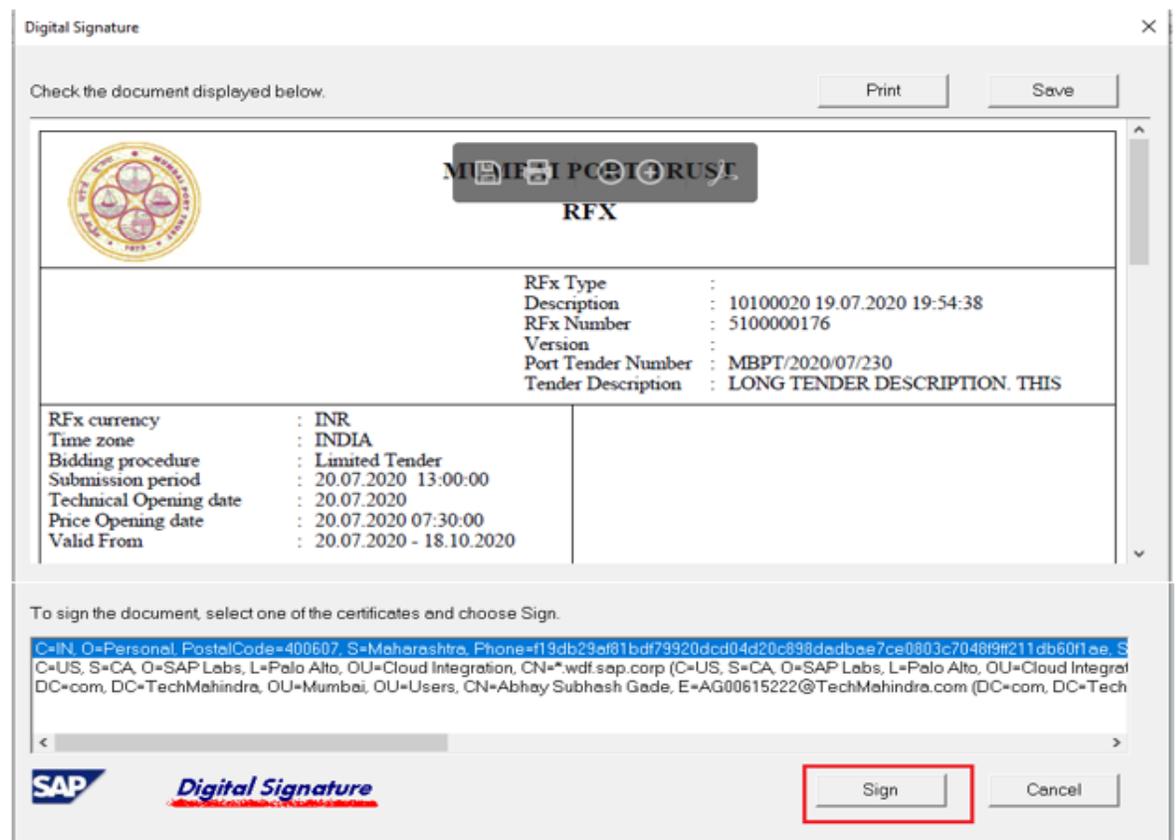
Once you click on this button as pop-up window will be displayed as below. Click on “OK” button.





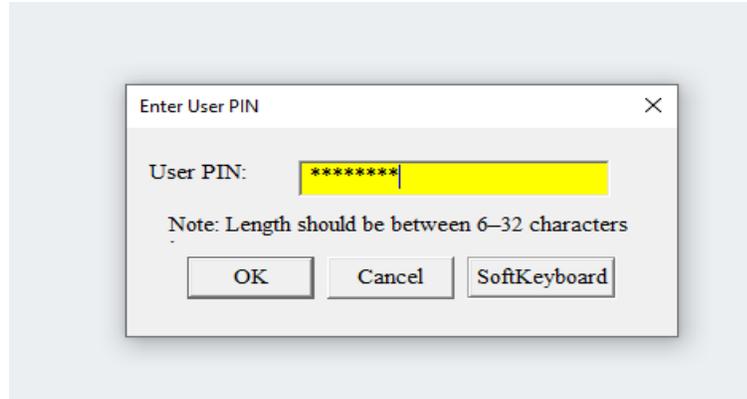
## SAP User Manual for Preventive Maintenance

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.



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

## SAP User Manual for Preventive 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\(bD11biZjPTUwMCZwPTMOMjE0InY9Ny41MCZpPTE=\)/bc/bsp/sapsrm/call\\_sig\\_ctrl/signature.htm?onInputProcessing=SIGNATURE&sap-params=c3NmX3Nlc3NfaW](https://ipasapqimq.portebs.com:4302/sap(bD11biZjPTUwMCZwPTMOMjE0InY9Ny41MCZpPTE=)/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.

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"

Confidential Document

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# SAP User Manual for Preventive Maintenance

**Display RFX :**

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

Rfx 10100020 19.07.2020 19:54:38- 5100000176 has been published  
 Rfx is complete and contains no errors

Rfx Number 5100000176    Rfx Name 10100020 19.07.2020 19:54:38    Type Single Tender    **Status Awaiting Approval**    Created On 19.07.2020 19:56:18    Created By ADITI SHENDYE  
 Number of Suppliers 1    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

<b>Identification</b> Rfx Name: 10100020 19.07.2020 19:54:38 Port Tender No: MBPT/2020/07/230 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	<b>Event Parameters</b> 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: <input checked="" type="checkbox"/> Allow Multiple Rfx Responses for Each Company: <input checked="" type="checkbox"/> Display Weighting to Bidders: <input type="checkbox"/>
<b>Organization</b> Purchasing Organization: Mumbai Port Trust Purchase Organisation Purchasing Group: Material Mgmt Purchase Group <a href="#">Show Members</a>	<b>Tender Fee</b> Required: <input checked="" type="checkbox"/> Tender Fee Percentage: 5 * Tender Fee: 8,000.00 INR
<b>Dates</b> Rfx Start Date: 20.07.2020 13:00:00 * Rfx Submission Date: 20.07.2020 14:00:00	

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





## SAP User Manual for Preventive 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.

The screenshot shows the E-Procurement Portal interface. The browser address bar displays the URL: https://ipasdbqieq.portebs.com:50001/rmj/portal. The page header includes the Indian Ports Association logo, the text "E-PROCUREMENT PORTAL", and user information: "Welcome MANDAR PARKAR (10100001)", "Login Time: 20/07/2020 12:23:18". The navigation menu on the left includes "Home", "Strategic Purchasing", "Overview", "Work Overview", "Reports", "Services", and "Advanced Search". The "Work Overview" section is active, showing tabs for "Alerts", "Tasks (10 / 10)", and "Notifications". The "Tasks" tab is selected, displaying a list of tasks. The first task, "Approve RFx Number 5100000176", is highlighted in yellow and has a red box around it. The table columns are "Subject", "Sent Date", "Due Date", and "Status".

Subject	Sent Date	Due Date	Status
Approve RFx Number 5100000176	Today		New
Approve RFx Number 5100000131	Jul 2, 2020		New
Approve RFx Number 5100000123	Jun 26, 2020		New
Approve RFx Number 5100000098	Jun 21, 2020		New
Approve RFx Number 5100000097	Jun 21, 2020		New
Approve RFx Number 5100000108	Jun 21, 2020		New
Approve RFx Number 5100000107	Jun 21, 2020		New
Approve RFx Number 5100000104	Jun 21, 2020		New
Approve RFx Number 5100000100	Jun 21, 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.



## SAP User Manual for Preventive Maintenance

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.

**Approve RfX :**

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

RfX Number 5100000176 RfX Name 10100020 19.07.2020 19:54:38 Type Single Tender Status Awaiting Approval Created On 19.07.2020 19:56:18 Created By ADITI SHENDYE  
Number of Suppliers 1 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 19.07.2020 19:54:38  
Port Tender No: MBPT/2020/07/230  
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:   
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: 20.07.2020 13:00:00  
\* RfX Submission Date: 20.07.2020 14:00:00  
Price RfX Opening Date: 20.07.2020 14:00:00

**Tender Fee**

Required:   
Tender Fee Percentage: 5  
\* Tender Fee: 8,000.00 INR  
Submission Deadline: 20.07.2020 13:30:00

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



## SAP User Manual for Preventive Maintenance

**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 5100000176 ) was approved

RfX Number 5100000176 RfX Name 10100020 19.07.2020 19:54:38 Type Single Tender Status Awaiting Approval Created On 19.07.2020 19:56:18 Created By ADITI SHEN  
 Number of Suppliers 1 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 Event Parameters

RfX Name: 10100020 19.07.2020 19:54:38 Currency: INR  
 Port Tender No: MBPT/2020/07/230 Target Value: 160,000.00 INR  
 Tender Description: LONG TENDER DESCRIPTION. THIS TENDER TYPE IS USED FOR PROPRIETARY / OEM VENDORS. THIS FIELD IS OF 256 CHARACTERS. Detailed Price Information: Simple Price  
 RfX Type: Single Tender Follow-On Document: Purchase Order or Contract  
 Publication Type: Restricted RfX Bidder Can Change RfX Responses:   
 Allow Multiple RfX Responses for Each Company:   
 Display Weighting to Bidders:

Organization

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.

RfX is available for RfX Response submission

Created R.SUGANTHESWARI PRIYATHARISINI

Hi FELIX ENGG. CO. ,

RfX has been published and available for RfX Response submission.

RfX details are mentioned below:

RfX Number :

RfX Date/Time : 00000000 000000

RfX Description :

Regards,  
 Workflow System

\*\*\* This is a system triggered e-mail from Indian Port Authority \*\*\*

## SAP User Manual for Preventive Maintenance

### Technical RfX Response Activity

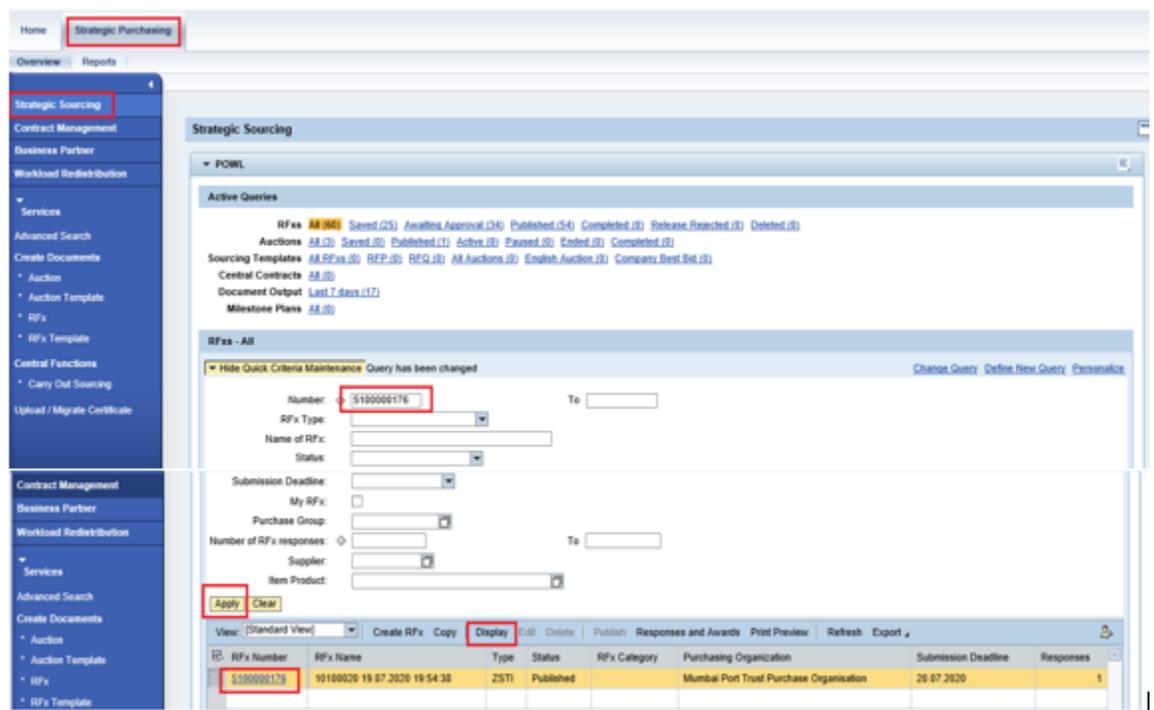
#### Initiate Technical RfX Response Opening

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.



The screenshot shows the SAP Strategic Sourcing interface. The 'Strategic Purchasing' tab is selected. In the left-hand navigation pane, 'Strategic Sourcing' is highlighted. The main area displays search criteria for RfX. The 'Number' field is populated with 'S190000176'. Below the search criteria, there is an 'Apply' button and a 'Display' button. At the bottom, a table lists RfX entries. The first entry is highlighted in yellow.

RFx Number	RFx Name	Type	Status	RFx Category	Purchasing Organization	Submission Deadline	Responses
S190000176	10100020 19 07 2020 19 54 38	ZSTI	Published		Mumbai Port Trust Purchase Organisation	20 07 2020	1

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 Preventive Maintenance

**Display RFX :**

Close Technical RFX Permissions **Initiate Technical RFX Response Opening** Open Technical RFX Response Copy Check Discharge RFX Responses and Awards Create Follow-up  
Verify Signature Questions and Answers (0) Maintain Rfx Parameter System Information Create Memory Snapshot Related Links

RFX Number 5100000176 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  
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 19.07.2020 19:54:38  
Port Tender No: MBPT/2020/07/230  
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:   
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](#)

**Tender Fee**

Required:   
Tender Fee Percentage: 5  
\* Tender Fee: 8,000.00 INR  
Submission Deadline: 20.07.2020 13:30:00

**Dates**

RFX Start Date: 20.07.2020 13:00:00  
\* RFX Submission Date: 20.07.2020 14:00:00  
Price Rfx Opening Date: 20.07.2020 14:00:00

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: ●●●●●●

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.

Close

\* Tender Fee:



## SAP User Manual for Preventive Maintenance

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

The screenshot shows a window titled "Simultaneous Logon" with the following sections:

- User approval successful** (with a green checkmark icon)
- Process Details**: Process Start-End Time: 15:45:06 - 15:50:06
- Process Time Remaining**: 00:05:00. Below it, "Extend Process Time" is set to 00:00:00 with an "Extend" button.
- Active Approvals**: A table with columns "User", "Approved", and "Approval Time".

User	Approved	Approval Time
10100020	<input type="checkbox"/>	00:00:00

At the bottom, there is a "Help" section with instructions: "Enter your system password for secondary verification. The password is checked against the system." and a "Close" button.

Since this is a Single tender i.e. proprietary / OEM 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 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 TCR report, click on “**Response and Awards**” button as mentioned in the below screenshot.



## SAP User Manual for Preventive Maintenance

**Display RFX :**

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 5100000176 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

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

RFX Parameters Questions Notes and Attachments

**Identification**

RFX Name: 10100020 19.07.2020 19:54:38  
Port Tender No: MBPT/2020/07/230  
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:   
Allow Multiple RFX Responses for Each Company:   
Display Weighting to Bidders:

**Organization**

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

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



### SAP User Manual for Preventive Maintenance

**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 19.07.2020 19:54:38 | Type Single Tender | Status Published | Number of Suppliers 1 | RFX Number 5100000176

Response Activity | **Technical Response Activity**

**Technical RFX Responses and Awards**

TCR Report | Accept | Reject | Refresh

RFX Response	RFX Response Status	Company Name	Bidder Name	RFX Response Version	Last Changed
6100000164	Bid submitted	FELIX ENGG. CO.	FELIX ENGG. CO.	1	20.07.2020

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.

Technical Comparative Stat... x

**SAP** Technical Comparative Statement

RFX No: 5100000176  
Purch Org: Mumbai Port Trust Purchase Organisation

**Technical Comparative Statement**

S.No.	Group	Question	Buyer Comments for 6100000164	40000442 & / 6100000164
1	Eligibility Criteria	WHETHER ANNUAL AVERAGE TURN OV...	Ok..checked all the documents and found ok	YES SIMILAR WORK DONE BEFORE
2	Eligibility Criteria	DOU YOU HAVE PAN NO	Checked PAN no	YES

List Of Attachments | Email Loas for Shortfall Docs

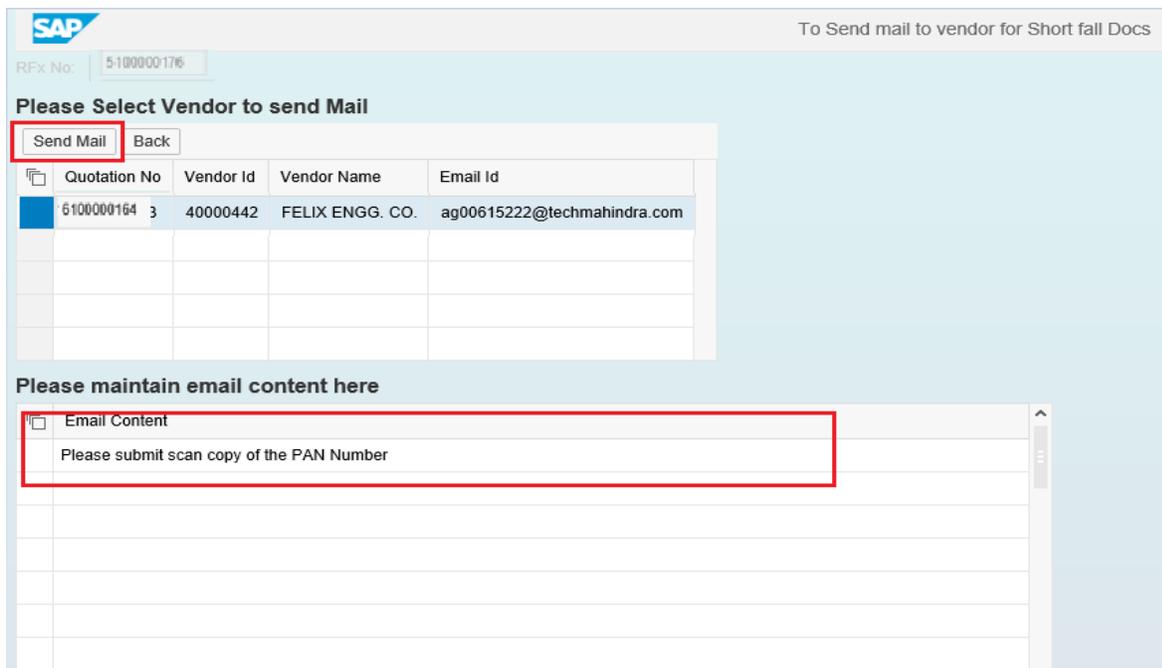


## SAP User Manual for Preventive Maintenance

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. Here buyer need to provide the mail content and then select the respective response and then click on “Send Mail”.



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



## SAP User Manual for Preventive 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 and forward it to the scrutiny and review committee team.

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.

Buyer's Overall Comments:

**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	



## SAP User Manual for Preventive Maintenance

Buyer need to maintain the overall comment's and then click on "Save" button. It is mandatory for Buyer to provide his overall comments.

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.

**Maintain Sequence for Scrutiny Workflow members**

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

**Maintain Sequence for Committee Workflow members**

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.

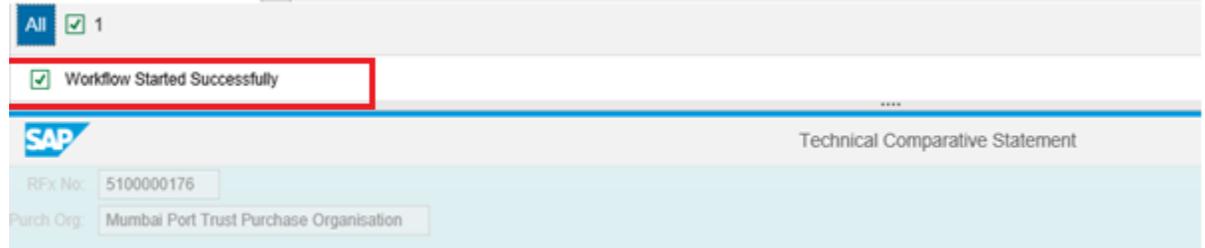
Now Buyer needs to click on "Forward" button as shown below.

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

System will display message as shown in below screenshot.



## SAP User Manual for Preventive Maintenance



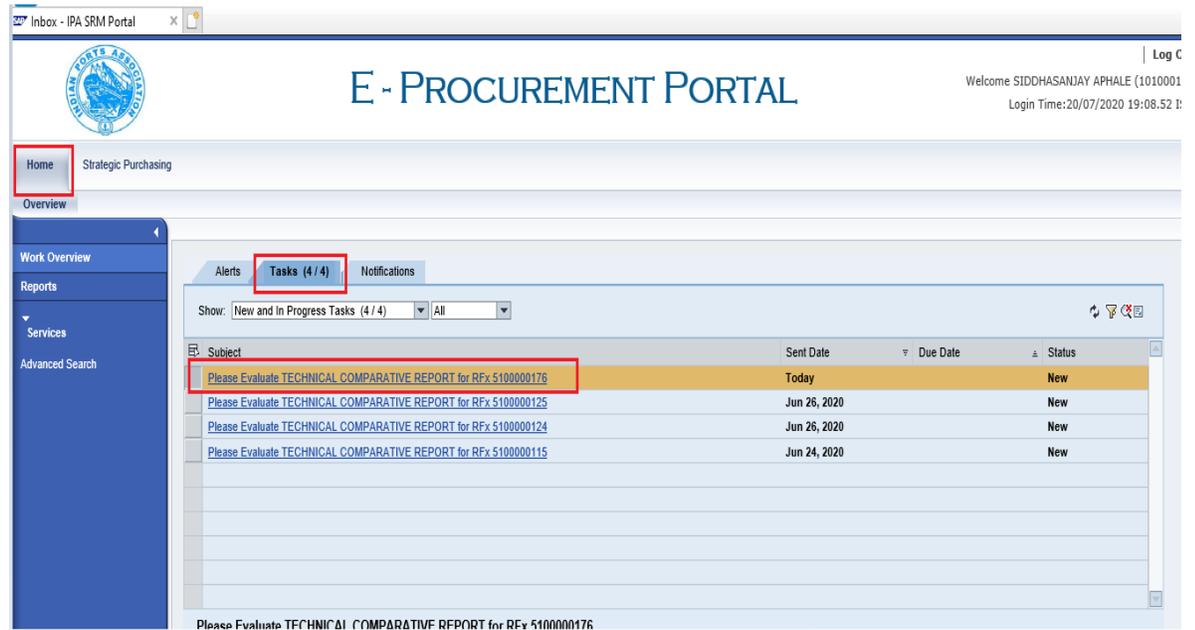
Email notification will be triggered to the respective users to approve the TCR report.

### 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.



A new window will get displayed as shown below.



## SAP User Manual for Preventive Maintenance

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.

Task - IPA SRM Portal - Internet Explorer - [InPrivate]  
InPrivate https://ipasdbqieq.portebs.com:50001/irj/portal?NavigationTarget=ROLES%3A%2F%2Fportal\_center

Please evaluate the below RFx

RFx No: 5100000176

Comments from 10100011 Scrutiny team member. This is a fee 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: 5100000176

Comments from 10100011 Scrutiny team member. This is a fee text box.

Submit Return TCR PDF Close



## SAP User Manual for Preventive Maintenance

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#5.3.1 to point#5.3.5

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

Buyer's Comments

Buyer's Overall Comments: All documents are ok. Forwarding to scrutiny and review committee

Scrutiny's Team Comment

User ID	Full Name	Status	Comment's Date	Comment's Time	Comments
10100012	PERAMPATTANALIL GOPI	APPROVED	20.07.2020	19:14:55	Approved by 10100012 Scrutiny team member
10100011	SIDDHASANJAY APHALE	APPROVED	20.07.2020	19:11:10	Comments from 10100011 Scrutiny team member. This is a fee text box.

Observation/Recommendation committee's Comments

User ID	Full Name	Status	Comment's Date	Comment's Time	Comments
10100024	MRINALINI KELKAR	APPROVED	20.07.2020	19:30:21	Approved...
10100013	ARVIND APANDKAR	APPROVED	20.07.2020	19:29:14	Approved...

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.



## SAP User Manual for Preventive Maintenance

**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 19.07.2020 19:54:38 | Type Single Tender | Status Published | Number of Suppliers 1 | RfX

Response Activity | **Technical Response Activity**

**Technical RfX Responses and Awards**

TCR Report | **Accept** | Reject | Refresh

RfX Response	RfX Response Status	Company Name	Bidder Name	RfX Response Version
6100000164	Bid submitted	FELIX ENGG. CO.	FELIX ENGG. CO.	1

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

Since this is a single tender i.e proprietary / OEM type of bid, Buyer need not click on Reject button.

Response Activity | **Technical Response Activity**

**Technical RfX Responses and Awards**

TCR Report | **Accept** | Reject | Refresh

RfX Response	RfX Response Status	Company Name	Bidder Name	RfX Response Version	Last Changed
6100000164	<b>Tech Bid Accepted</b>	FELIX ENGG. CO.	FELIX ENGG. CO.	1	20.07.2020

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

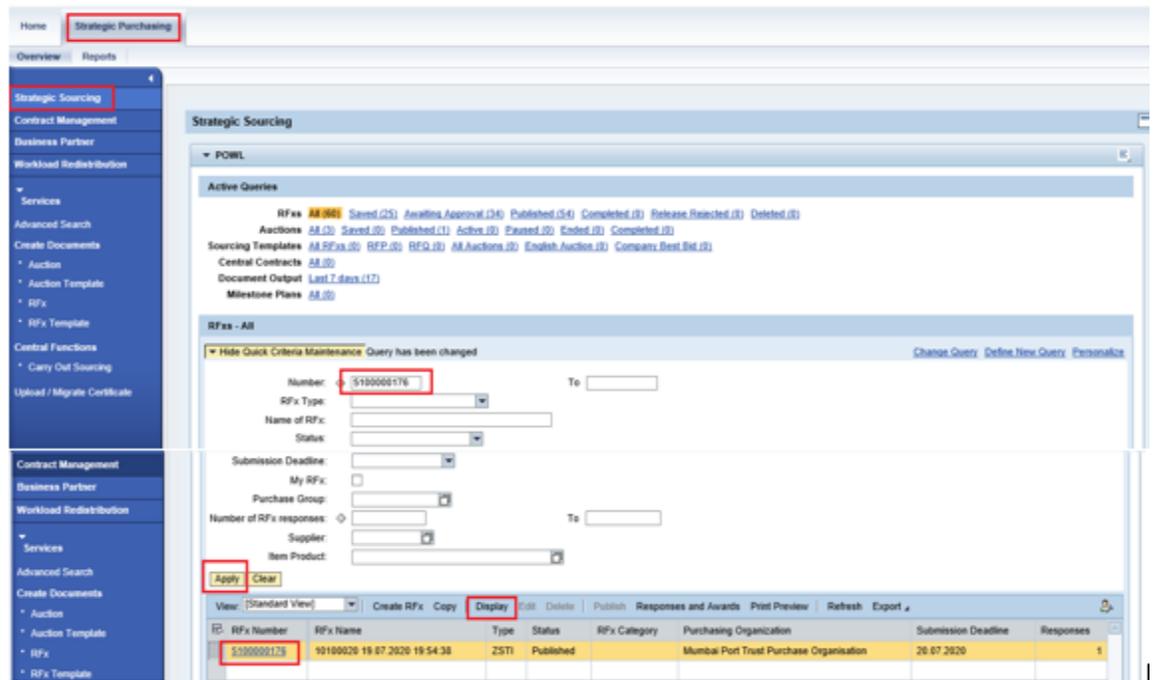
Buyer needs to login first to the EBS portal. Please refer to section number 1.1 for login to EBS portal & SSO to SRM portal & follow the steps.

## SAP User Manual for Preventive Maintenance

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.



The screenshot shows the SAP Strategic Sourcing search criteria screen. The 'Strategic Purchasing' tab is selected. The search criteria are as follows:

Field	Value
Number	1010000176
RfX Type	[Dropdown]
Name of RfX	[Text Field]
Status	[Dropdown]
Submission Deadline	[Dropdown]
My RfX	<input type="checkbox"/>
Purchase Group	[Dropdown]
Number of RfX responses	[Text Field]
Supplier	[Dropdown]
Item Product	[Dropdown]

The 'Apply' and 'Display' buttons are highlighted. Below the search criteria, a table lists the search results:

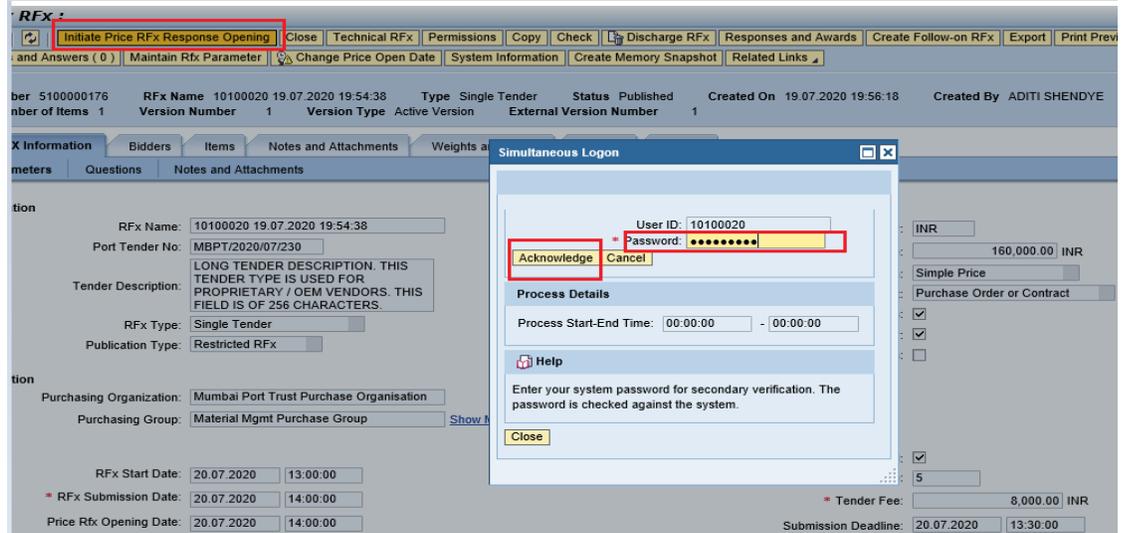
RFx Number	RFx Name	Type	Status	RFx Category	Purchasing Organization	Submission Deadline	Responses
1010000176	10100020 19 07 2020 19 54 38	ZSTI	Published		Mumbai Port Trust Purchase Organisation	20 07 2020	1

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.

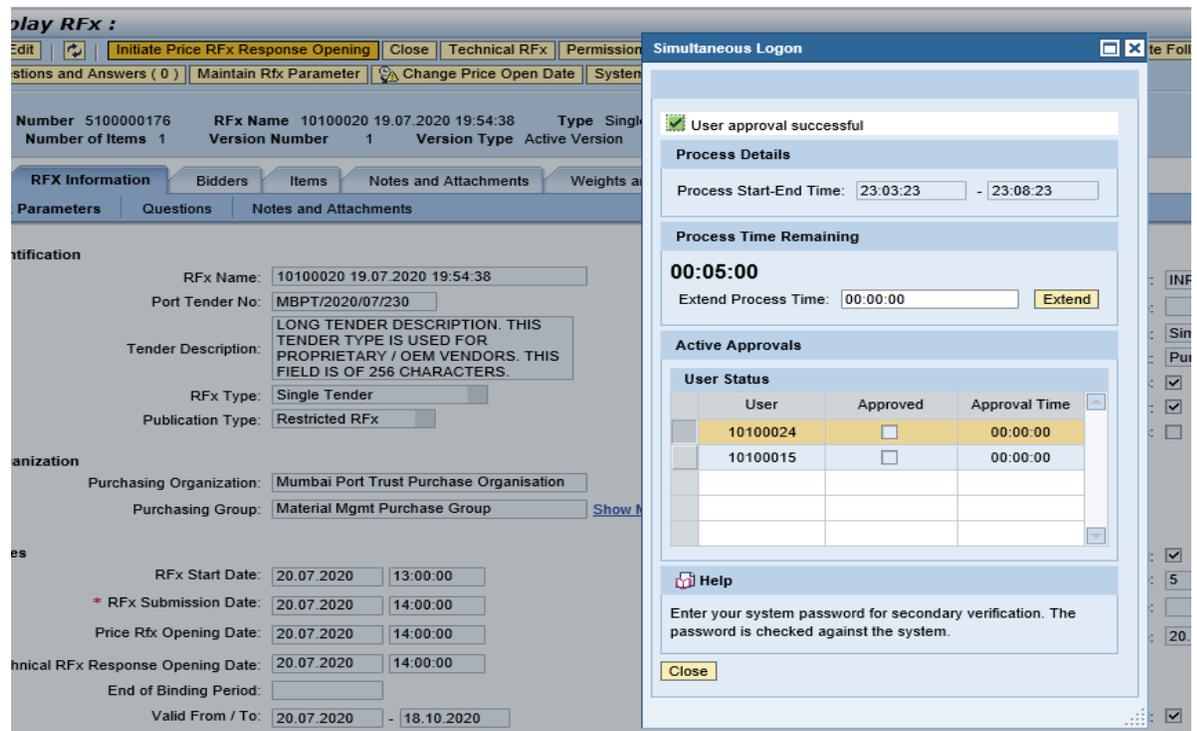
A new window will get popped-up. Provide the password and click on “Acknowledge” button.



## SAP User Manual for Preventive Maintenance



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.



## SAP User Manual for Preventive Maintenance

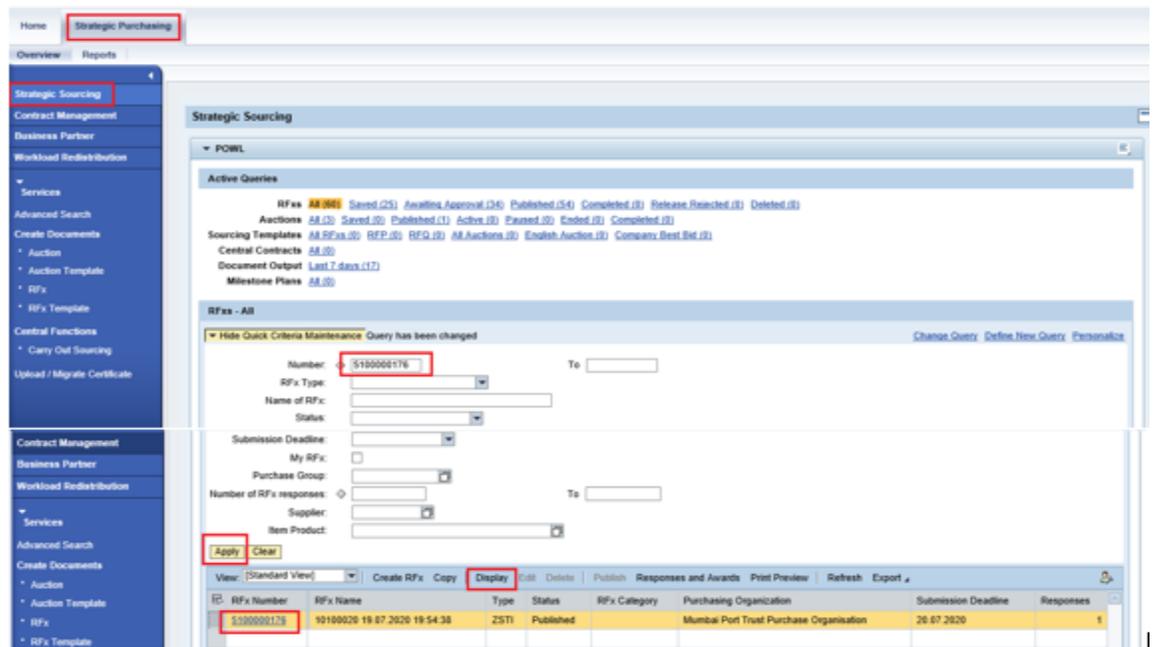
Email notification will be triggered to the user's for performing the price RfX response activity.

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.

Please see the screenshot below.



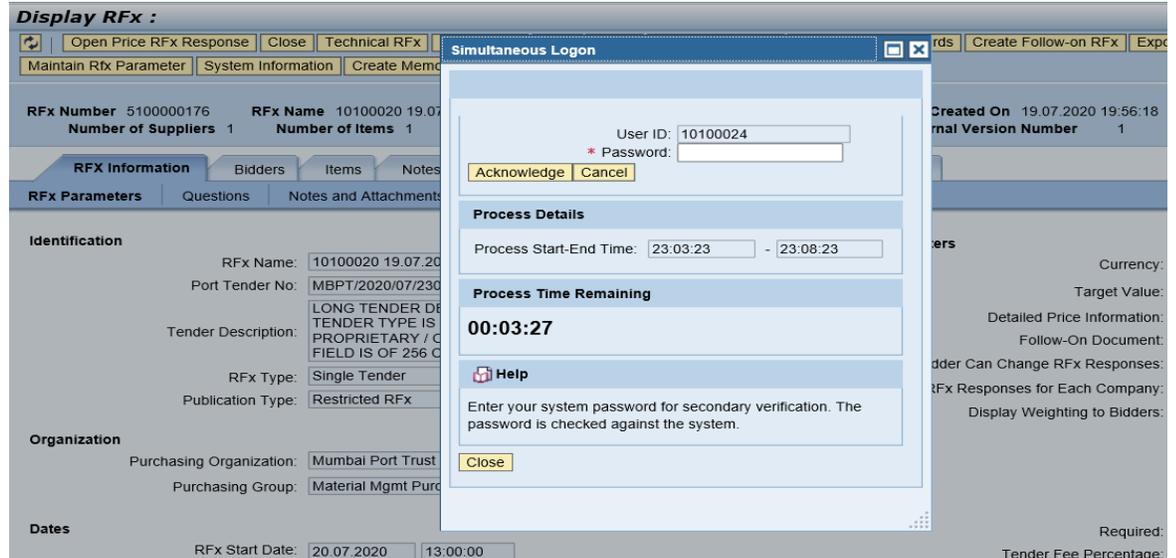
RFx will be visible in another window and it will be in display mode.

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

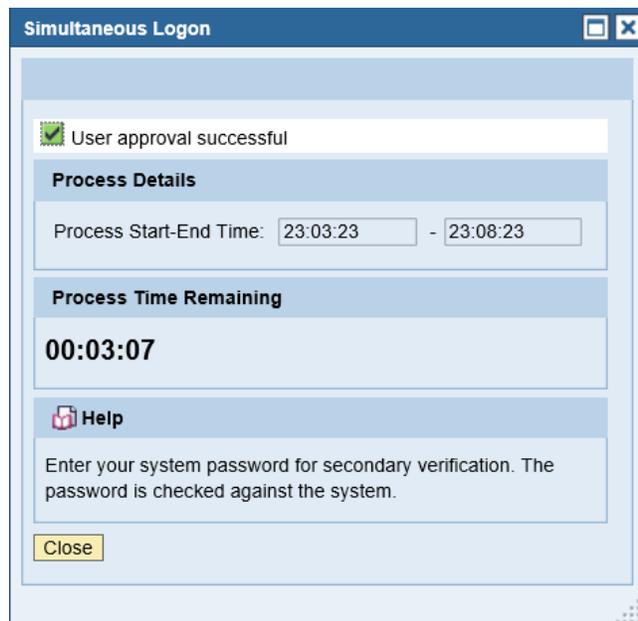
A new window will get popped-up. Provide the password and click on “Acknowledge” button.



## SAP User Manual for Preventive 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 Preventive 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.

### 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.

The screenshot shows the SAP 'Display RFX' interface. At the top, there is a toolbar with various buttons. The 'Responses and Awards' button is highlighted with a red box. Below the toolbar, there is a summary section with fields for RFX Number, Name, Type, Status, Created On, and Created By. Below this, there are tabs for 'RFX Information', 'Bidders', 'Items', 'Notes and Attachments', 'Weights and Scores', 'Approval', and 'Tracking'. The 'RFX Information' tab is selected, showing 'RFX Parameters', 'Questions', and 'Notes and Attachments'. The main content area is divided into 'Identification' and 'Event Parameters' sections. The 'Identification' section includes fields for RFX Name, Port Tender No., Tender Description, RFX Type, and Publication Type. The 'Event Parameters' section includes fields for Currency, Target Value, Detailed Price Information, Follow-On Document, Bidder Can Change RFX Responses, Allow Multiple RFX Responses for Each Company, and Display Weighting to Bidders. At the bottom, there is an 'Organization' section with 'Purchasing Organization' and 'Tender Fee' fields.

A new window will get opened. Select the “Response Comparison” tab and click on the “PCR Report” button. Please see screenshot below.



## SAP User Manual for Preventive Maintenance

**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 19.07.2020 19:54:38 | Type Single Tender | Status Published | Number of Suppliers 1 | RFX Num

Response Activity | **Response Comparison** | Technical Response Activity

Compare Selected Responses | Compare All Responses | Advanced Comparison | **PCR Report** | PCR for ALR and AHR

Response Number	Response Version	Company Name
6100000164	1	FELIX ENGG. CO.

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.

Application to call Price Co... x

**SAP** Price Comparative Statement

Rfx No: 5100000176  
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**

Buyer's Overall Comments: Forwarding to Price scrutiny and review committee.]



## SAP User Manual for Preventive Maintenance

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.

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



## SAP User Manual for Preventive Maintenance

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.

The screenshot shows the SAP interface for maintaining workflow sequences. At the top, there is a status bar with 'All' and a checked box next to '1', and a message 'Data Updated Successfully'. Below this is the SAP logo and the title 'Maintain Sequence for Scrutiny Workflow Members'. This is followed by a table with columns: User Name, Full Name, User Type, and Sequence. The first row contains the data: 10100019, LATA DATE, A, and 1. Below this table is another section titled 'Maintain Sequence for Committee Workflow Members' with a similar table. The first two rows contain data: (10100024, MRINALINI KELKAR, C, 1) and (10100017, MUKESH NAWANI, C, 2). At the bottom of the interface, two buttons are visible: 'Save Sequence' and 'Back To Main Screen', both of which are highlighted with red rectangular boxes.

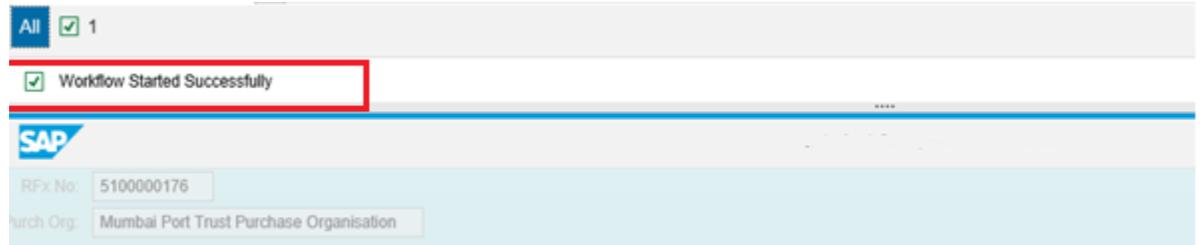
Now Buyer needs to click on “Forward” button as shown below to trigger the workflow.

The screenshot shows a horizontal bar with several buttons. From left to right, the buttons are: 'Save', 'Maintain Workflow Sequence', 'Forward', 'PDF', and 'Close'. The 'Forward' button is highlighted with a red rectangular box.

System will display message as shown in below screenshot.



## SAP User Manual for Preventive Maintenance

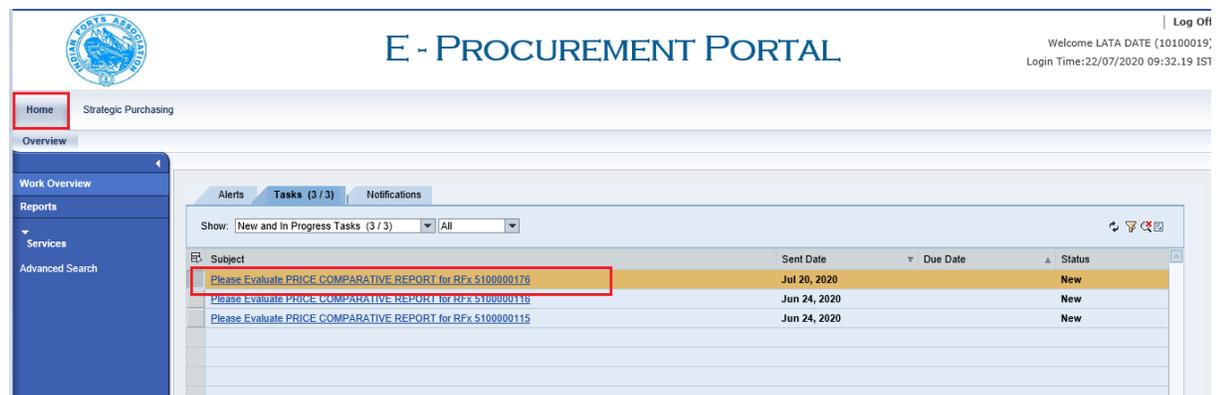


### Approving PCR

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.

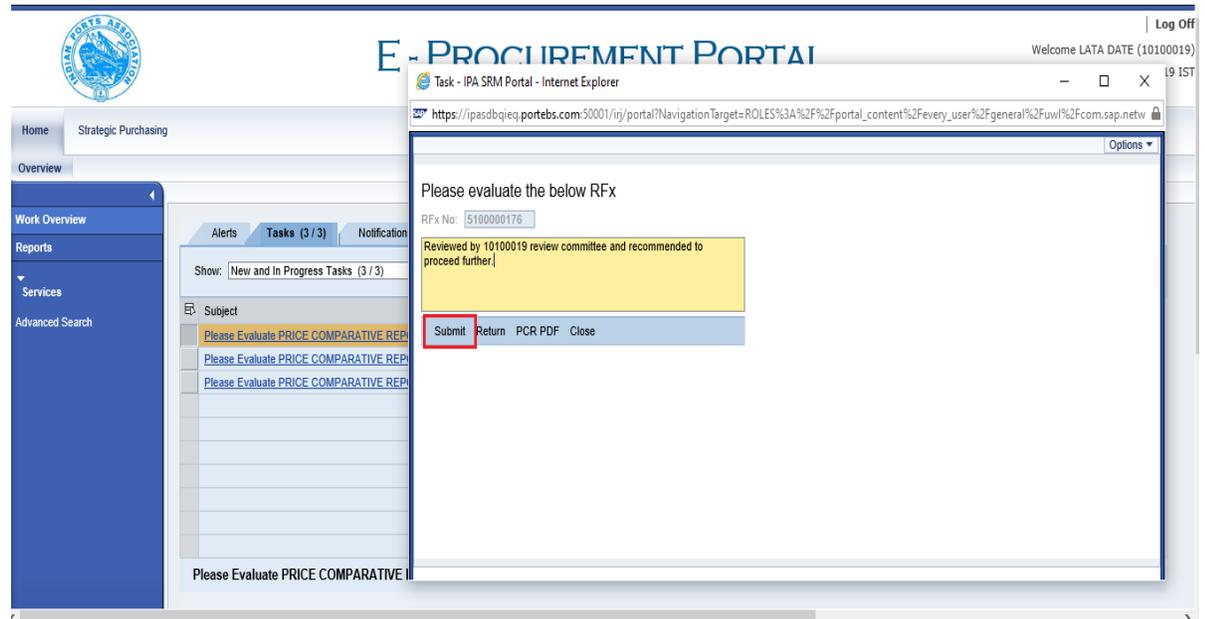


A new window will get displayed as shown below.

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



## SAP User Manual for Preventive Maintenance



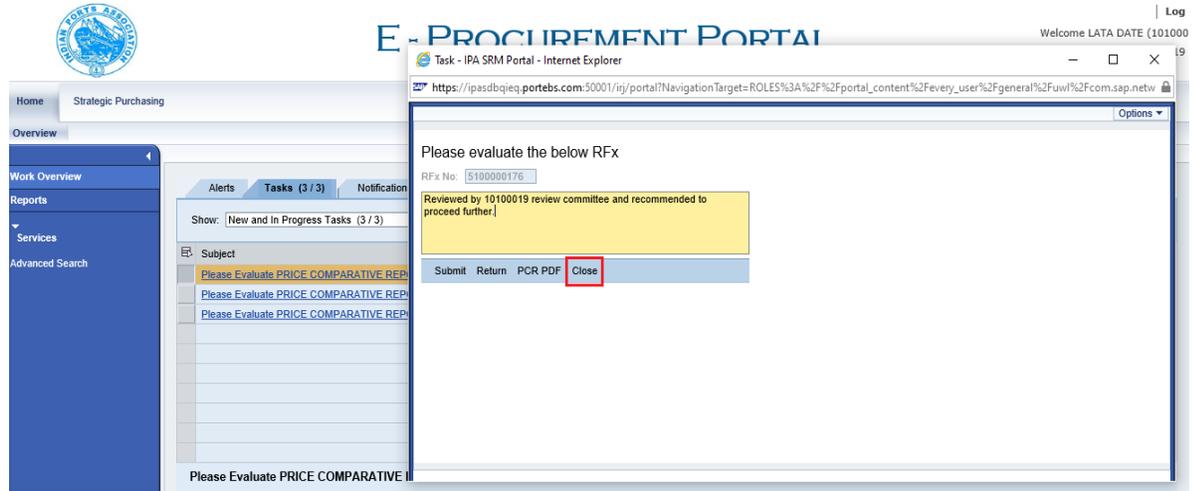
If there are some clarifications required from Buyer, then the scrutiny member needs to click on “Return” button. The workflow will be re-triggered back to Buyer and Buyer is required to provide satisfactory justification and then again trigger the workflow.

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.

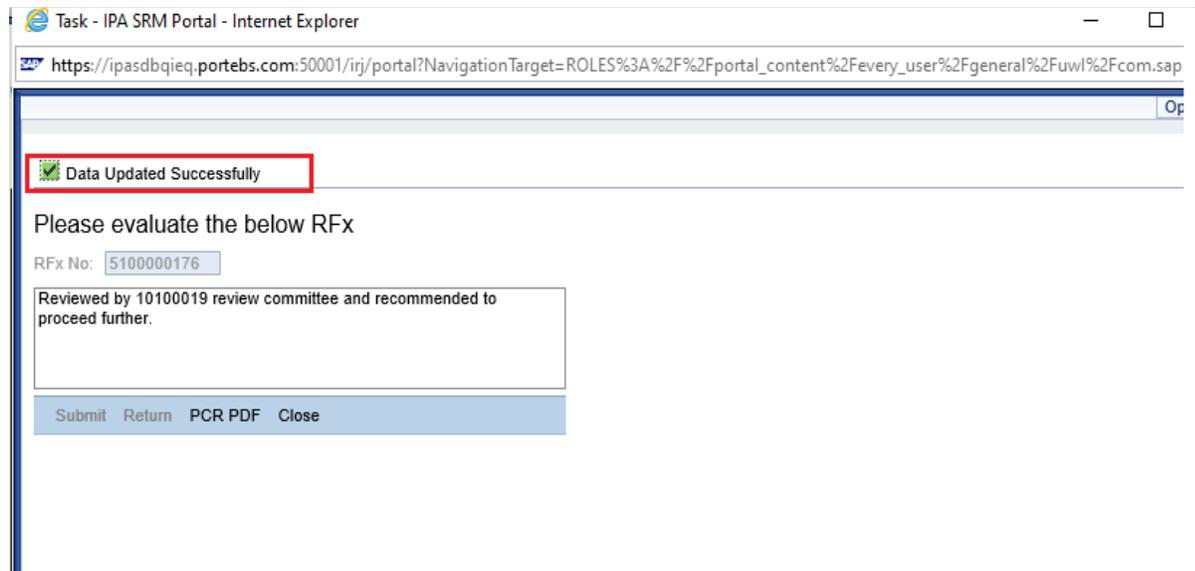
Click on the “Close” button to close this screen.



## SAP User Manual for Preventive 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.



## SAP User Manual for Preventive Maintenance

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 Price Comparative Statement**

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

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



## SAP User Manual for Preventive Maintenance

### 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.

**Display RFx :**

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 5100000176 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

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

RFX Parameters Questions Notes and Attachments

**Identification**

RFx Name: 10100020 19.07.2020 19:54:38

Port Tender No: MBPT/2020/07/230

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:

Allow Multiple RFx Responses for Each Company:

Display Weighting to Bidders:

**Organization**

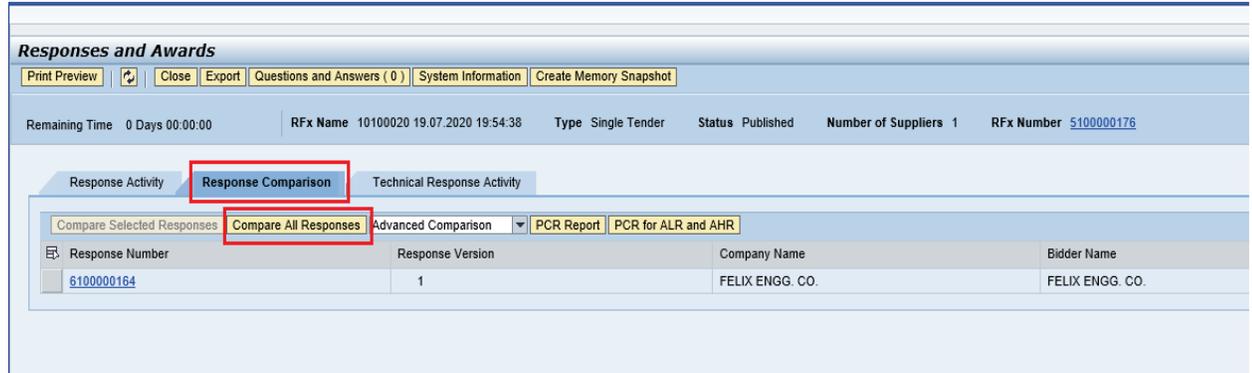
Purchasing Organization: Mumbai Port Trust Purchase Organisation

Tender Fee Security Depos

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



## SAP User Manual for Preventive Maintenance



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



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 Preventive 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 19.07.2020 19:54:38 | Type Single Tender | Status Publis

Response Activity | **Response Comparison** | Technical Response Activity

Display Bidders | Comparison Date: 20.07.2020 | Back to Response Comparison Main View | Generate PDF | Download

Expand All Collapse All

Header/Item No.	Item/Attributes	FELIX ENGG. CO. : FELIX ENGG. CO. : Submitted
▶ Header	Description	10100020 19.07.2020 19:54:38
▼ Item:	Short Text	Preventive Maint by External Vendor
	Delivery date	24.09.20
	Item-Level Rank	1
	Unit	LE
	Net value	10,000.00
	Quantity	1
	Lot-Level Rank	1
	Product Cat.	72000000
	Currency	INR
	Deviation From RFX Response	0.000 %
	Accept	<input checked="" type="checkbox"/>
▼ Item:	Short Text	Two Coats - Oil Bound Distemper
	Delivery date	24.09.20
	Item-Level Rank	1

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.



# SAP User Manual for Preventive Maintenance

## Responses and Awards

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

RFx response 6100000164 (10100020 19.07.2020 19:54:38) accepted

Remaining Time 0 Days 00:00:00 | RFx Name 10100020 19.07.2020 19:54:38 | Type Single Tender | Status Published

Response Activity | Response Comparison | Technical Response Activity

Display Bidders | Comparison Date: 20.07.2020 | Back to Response Comparison Main View | Generate PDF | Download Responses

Expand All Collapse All

Header/Item No.	Item/Attributes	FELIX ENGG. CO. : FELIX ENGG. CO. : Awaiting Approval
▶ Header	Description	10100020 19.07.2020 19:54:38
▶ Item:	Short Text	Preventive Maint by External Vendor
▶ Item:	Short Text	Two Coats - Oil Bound Distemper

Total Accepted Items Value: 10,000.00

Best Bid Value: 10,000.00

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 6100000164 | RFx Name 10100020 19.07.2020 19:54:38 | Status Awaiting Approval | Supplier Name FELIX ENGG. CO. | Total Value 10,000.00 INR | RFx Number 51

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

Current Status: Active | Header Approval Note

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
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	20.07.2020 19:54:38



## SAP User Manual for Preventive 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 top navigation bar includes the Indian Ports Association logo, the title "E - PROCUREMENT PORTAL", and user information: "Welcome MANDAR PARKAR (101000: Login Time:20/07/2020 19:59:29)". The main content area has a sidebar on the left with "Home" and "Strategic Purchasing" tabs. The "Tasks (10 / 10)" tab is selected, displaying a table of tasks. The first task is highlighted with a red box.

Subject	Sent Date	Due Date	Status
Approve RFx Response 10100020 19.07.2020 19.54.38 Number 6100000164	Today		New
Approve RFx Number 5100000123	Jul 2, 2020		New
Approve RFx Number 5100000098	Jun 26, 2020		New
Approve RFx Number 5100000098	Jun 21, 2020		New
Approve RFx Number 5100000097	Jun 21, 2020		New
Approve RFx Number 5100000108	Jun 21, 2020		New
Approve RFx Number 5100000107	Jun 21, 2020		New
Approve RFx Number 5100000104	Jun 21, 2020		New
Approve RFx Number 5100000100	Jun 21, 2020		New
Approve RFx Response 10100021 16.06.2020 22.55.11 Number 6100000064	Jun 17, 2020		New

Click on the “Approve RFX Response 61xxxxxxx” 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 Preventive Maintenance

**Approve RFX Response:**

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

RFX Response Number: 6100000164 | RFX Name: 10100020 19.07.2020 19:54:38 | Status: Awaiting Approval | Supplier Name: FELIX ENGG. CO. | Total Value: 10,000.00 INR | RFX Number: 5100000176

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: 20.07.2020 19:57:42 INDIA Last Changed By: ADITI SHENDY Creation Date: 20.07.2020 13:44:49 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: 160,000.00 INR Target Value of RFX in Selected Currency: 160,000.00 INR Net Value of Header Items: 10,000.00 INR Terms of Payment:	<b>Service and Delivery</b> Incoterm:
--	--

<b>Status and Statistics</b> Created On: 20.07.2020 13:44:49 INDIA Created By: Mr. FELIX ENGG. CO. Last Processed On: 20.07.2020 19:57:42 INDIA Last Processed By: ADITI SHENDY	<b>Port Tender No:</b> MBPT/2020/07/230 LONG TENDER DESCRIPTION. THIS TENDER TYPE IS USED FOR...
---	---

Organization

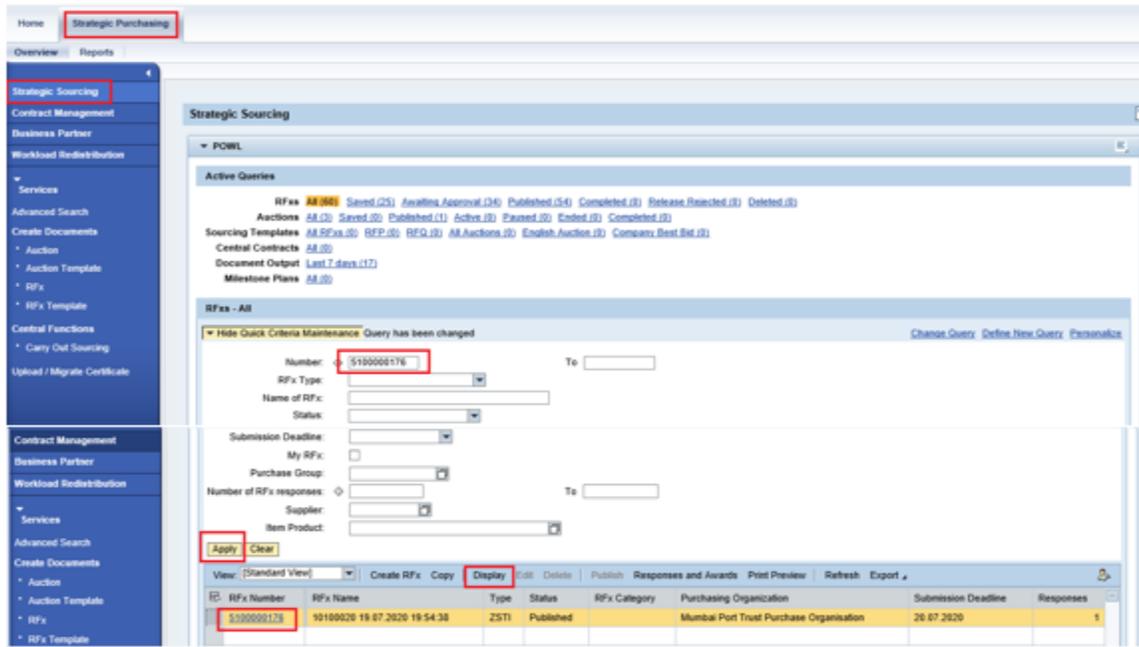
## Create Purchase Order

This is a final step wherein Buyer will be converting the response for the L1 bidder to either Purchase order / Service Order or Contract.

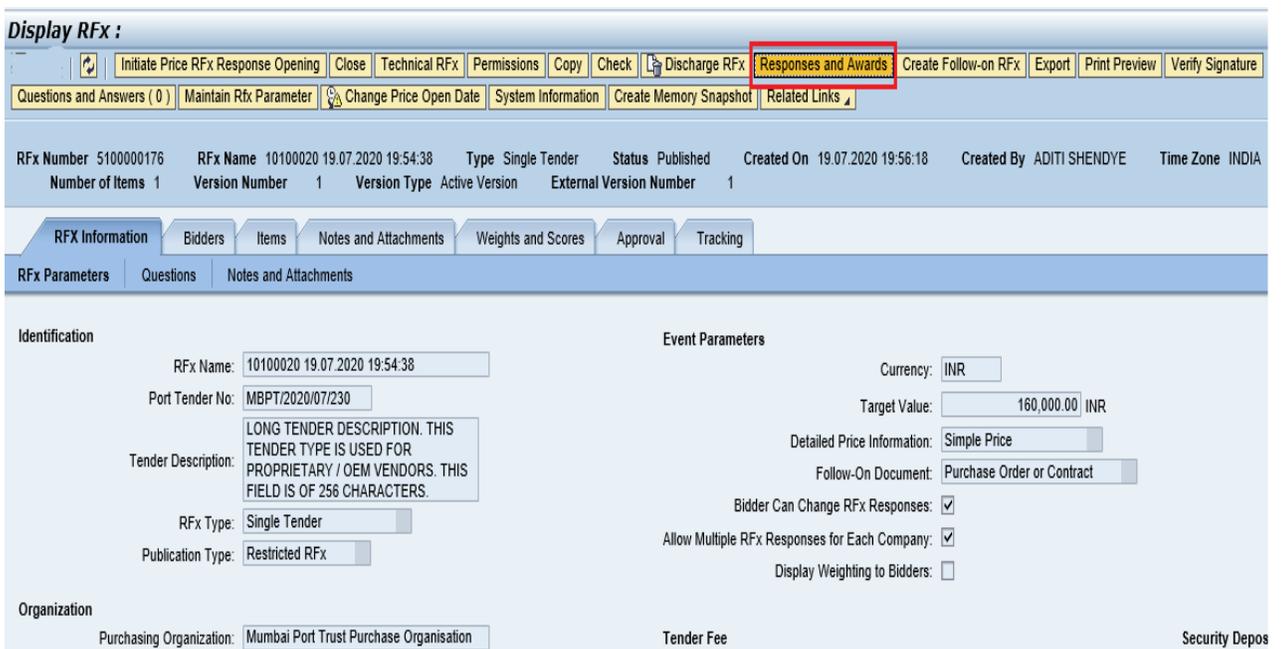
To perform this activity, Buyer needs to login to the EBS portal by following the steps mentioned in section Under the POWL screen, user can search for the particular RFX or select the particular RFX from the dashboard and click on "Display" button. The other way, is to click on the RFX number link to display the RFX.



# SAP User Manual for Preventive Maintenance



RFX will be displayed in another screen. Click on the “Response and Awards” button as shown below.





## SAP User Manual for Preventive Maintenance

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

**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 19.07.2020 19:54:38 | Type Single Tender | Status Published | Number of Suppliers 1 | RFx Number [5100000176](#)

Response Activity | **Response Comparison** | Technical Response Activity

Compare Selected Responses | Compare All Responses | Advanced Comparison | PCR Report | PCR for ALR and AHR

Response Number	Response Version	Company Name	Bidder Name
<a href="#">5100000164</a>	1	FELIX ENGG. CO.	FELIX ENGG. CO.

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

**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

RFx Response Number 6100000164 | RFx Name 10100020 19.07.2020 19:54:38 | Status Accepted | Supplier Name FELIX ENGG. CO. | Total Value 10,000.00 INR | RFx Number [5100000176](#)

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

General Data | Notes and Attachments | Questions | Messages

**Basic Data**

<p><b>Bidder Contact Information</b></p> <p>Supplier Name: FELIX ENGG. CO.          Contact Person Name: FELIX ENGG. CO.          E-Mail: ag00615222@techmahindra.com          Fax:          Phone: 123456789</p>	<p><b>RFx Response Information</b></p> <p>Last Changed On: 20.07.2020 20:03:15 INDIA          Last Changed By: MANDAR PARKAR          Creation Date: 20.07.2020 13:44:49 INDIA          Created By: Mr. FELIX ENGG. CO.</p>
<p><b>Event Parameters</b></p> <p>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: 160,000.00 INR          Target Value of RFx in Selected Currency: 160,000.00 INR          Net Value of Header Items: 10,000.00 INR          Terms of Payment:</p>	<p><b>Service and Delivery</b></p> <p>Incolern:</p> <p><b>Status and Statistics</b></p> <p>Created On: 20.07.2020 13:44:49 INDIA          Created By: Mr. FELIX ENGG. CO.          Last Processed On: 20.07.2020 20:03:15 INDIA          Last Processed By: MANDAR PARKAR          Port Tender No: MBPT/2020/07/230          Tender Description: LONG TENDER DESCRIPTION. THIS TENDER TYPE IS USED FOR PROPRIETARY / OEM VENDORS. THIS FIELD IS OF 256 CHARACTERS.          Pre-Bid End Date: 19.07.2020</p>
<p><b>Organization</b></p> <p>Responsible Purchasing Organization: 0 50000634 Mumbai Port Trust Purchase Organisation          Responsible Purchasing Group: 0 50000767 Material Mgmt Purchase Group          Pre-Bid Location: ON-LINE WEBEX SESSION</p>	



## SAP User Manual for Preventive Maintenance

Click on “Create Purchase Order” button as shown in screenshot below.

The screenshot shows the SAP 'Display RFX Response' interface. At the top, there is a menu bar with buttons: Print Preview, Close, Technical RFX Response, Export, **Create Purchase Order** (highlighted with a red box), Simulate and Create Purchase Order, Create Contract, Publish To Catalog, Undo Accept, LOA, System Information, and Create Memory Snapshot. Below the menu bar, the following information is displayed: RFX Response Number 6100000164, RFX Name 10100020 19.07.2020 19:54:38, Status Accepted, Supplier Name FELIX ENGG. CO., Total Value 10,000.00 INR, and RFX Number 5100000176. The 'Approval' tab is selected, showing 'Current Status: Finished' and 'Header Approval Note'. Below this, there is a 'Header Approval Status' table with one row: Sequence 001, Process Step SRM RFX Response/Bid Approval, Level Status Completed (Level was Processed), Status Approved, Processor Determination Gef Manager of P. Group (Header) for Appr. for RFX Response, Processor MANDAR PARKAR, Received On 20.07.2020 19:57:44, and Processed On 20.07.2020 20:01:24.

A new window will be popped-up, Select the transaction type and then click on “Create Purchase Order” button.

This screenshot shows the same SAP 'Display RFX Response' interface as above, but with a 'Create Purchase Order' dialog box open. The dialog box has a title bar 'Create Purchase Order' and a close button. It contains the text 'Select from the following transaction types:' followed by a table with two columns: Transaction Type and Description. The first row is highlighted in yellow and contains 'ZZNB' and 'STD Purchase Order'. Below the table, there are two buttons: 'Create Purchase Order' (highlighted with a red box) and 'Cancel'. The background interface is dimmed.



## SAP User Manual for Preventive Maintenance

PO will be created and replicated to backend system.

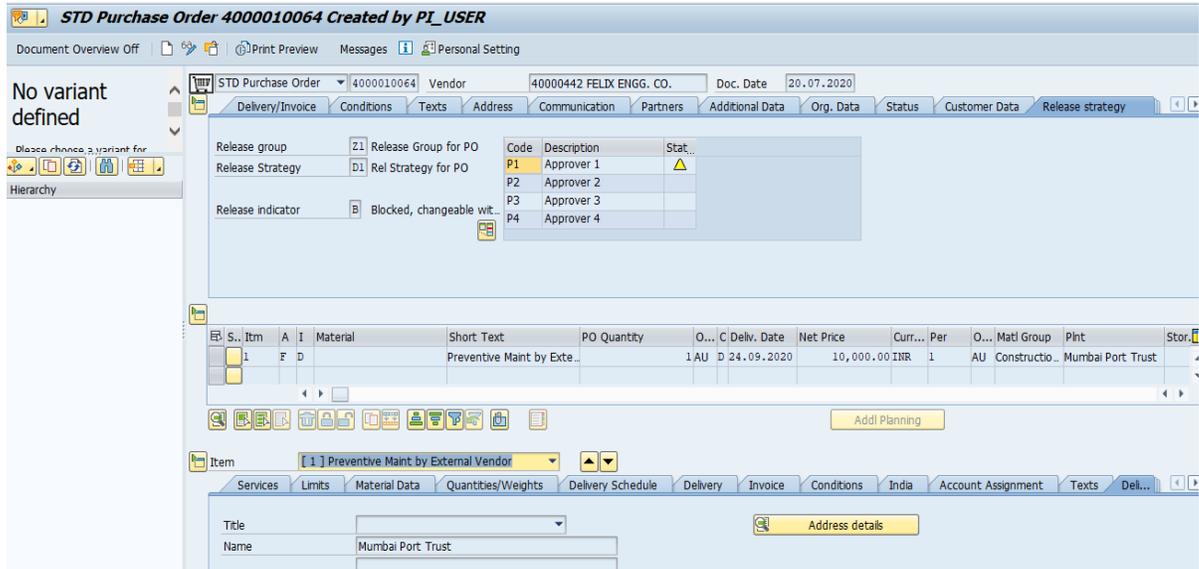
System will display message as “PO 4xxxxxxx” is in the process of transfer to back-end system” as shown in screenshot below

The screenshot shows the SAP 'Display RFX Response' interface. At the top, there are several action buttons: Print Preview, Close, Technical RFX Response, Export, Create Purchase Order, Simulate and Create Purchase Order, Create Contract, and Publish To Catalog. A red box highlights a message: 'PO 4000010064 is in the process of transfer to back-end system'. Below this, a table displays RFX details: RFX Response Number 6100000164, RFX Name 10100020 19.07.2020 19:54:38, Status Accepted, Supplier Name FELIX ENGG. CO., and Total Value. The 'Approval' tab is selected, showing fields for Current Status (Finished), Current Process Step, Currently Processed By, and Header Approval Note. There are also links for 'Download as XML' and a 'Follow Up' checkbox for 'Work Item to Requester at Process End'. At the bottom, the 'Header Approval Status' section includes 'Add Approver' and 'Remove Approver' buttons.

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

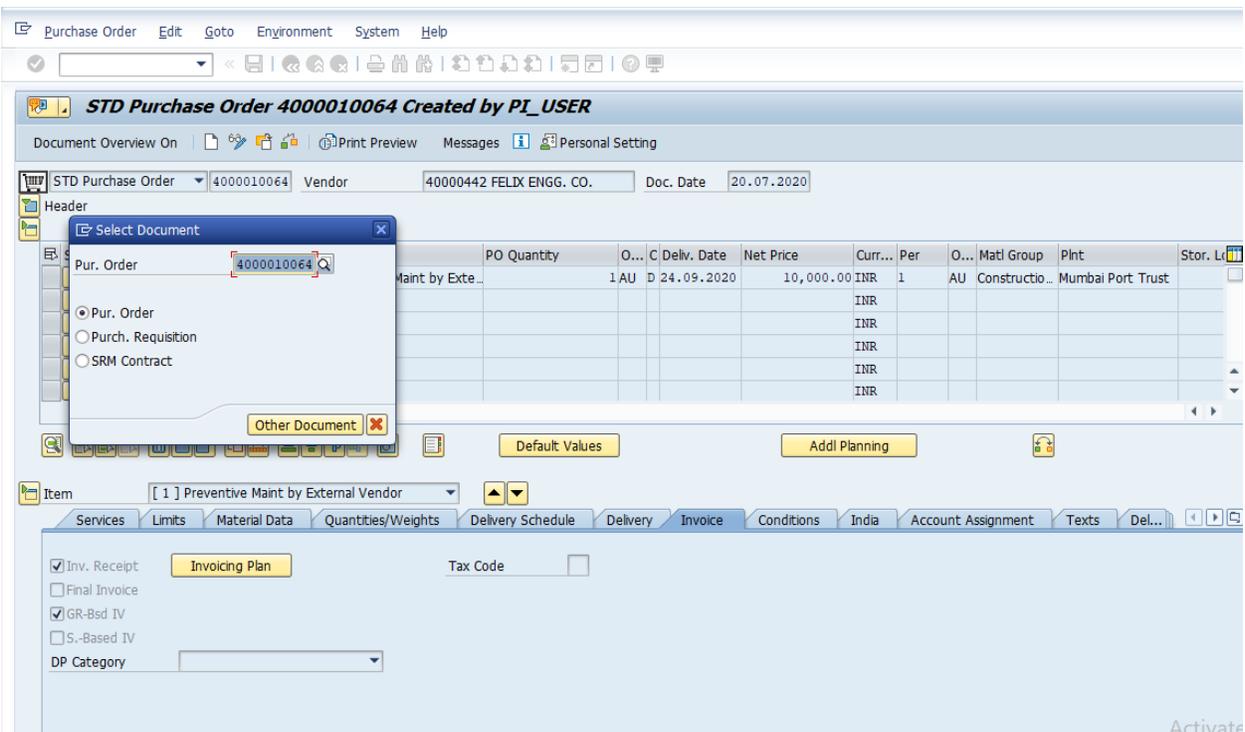


## SAP User Manual for Preventive Maintenance



### Create/ Change Purchase Order

Select other Purchase order and enter the PO Number “4000010064”





## SAP User Manual for Preventive Maintenance

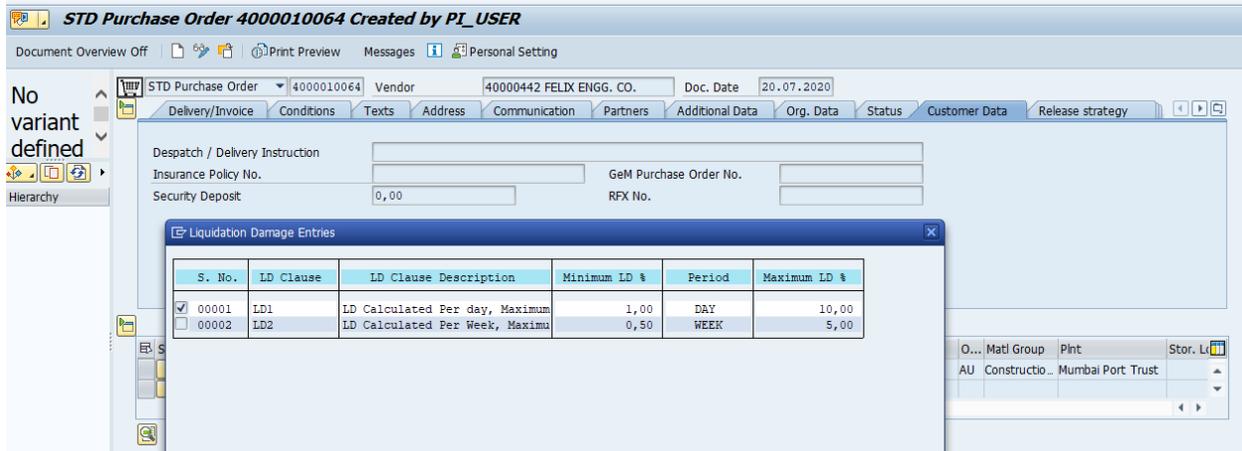
Select Invoice tab and select Tax Code “V1” and in header Level Choose appropriate in Customer Data LD Clause and Save the Purchase Order for Approval Process.

The screenshot displays the SAP Purchase Order (PO) interface. The title bar reads "STD Purchase Order 4000010064 Created by PI\_USER". The document overview shows the PO number 4000010064, Vendor 40000442 FELIX ENGG. CO., and Doc. Date 20.07.2020. The main table lists one item: "Preventive Maint by Exte..." with a quantity of 1 AU and a net price of 10,000.00 INR. The "Invoice" tab is selected, showing the "Invoicing Plan" and "Tax Code" field set to "v1". Other tabs include Services, Limits, Material Data, Quantities/Weights, Delivery Schedule, Delivery, Conditions, India, Account Assignment, Texts, and Del... The SAP logo and user ID MP00611268 are visible at the bottom.

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		Preventive Maint by Exte...	1	AU	D 24.09.2020	10,000.00	INR	1	AU	Constructio...	Mumbai Port Trust	



## SAP User Manual for Preventive 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 “ Service Purchase Ord created under the number 4000010064” Message.



## SAP User Manual for Preventive Maintenance

### Release of Purchase Order-Approval Process

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

The screenshot shows the SAP login interface. At the top, there are menu items: User, System, and Help. Below the menu is a toolbar with a green checkmark, a dropdown arrow, and several icons (back, forward, home, search, print, etc.). The main content area is titled "SAP" and contains the following fields:

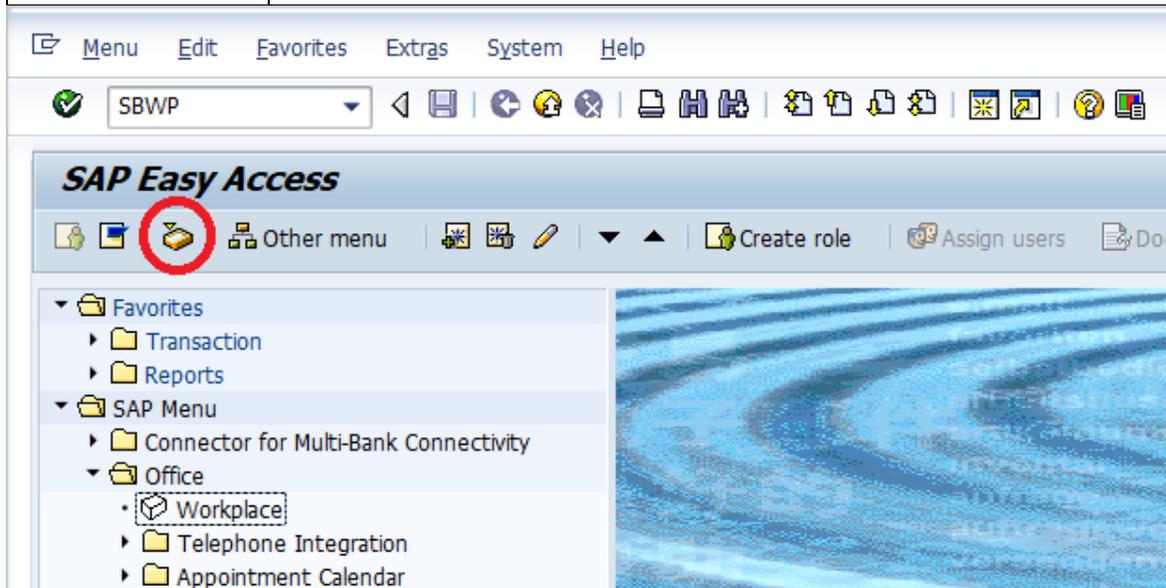
Client	500
User	AE001
Password	***** *****
Logon Language	EN

## SAP User Manual for Preventive 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 Preventive Maintenance

Expand “Inbox” button, under workflow “**Approve Purchase Order 4000010064**” message will appear.

The screenshot displays the SAP Workflow 27 interface. On the left, a navigation pane shows the 'Inbox' folder expanded, with 'Workflow 27' selected. The main area shows a list of tasks with columns for 'Ex.', 'Title', 'Status', 'Work Item ID', 'Creation Da', 'Creation P. At.', 'Co.', 'W.', and 'Dynamic column'. The first task is 'Please approve the Purchase Order 4000010064' with a status of 'S' and a work item ID of 415455. Below the list, a detailed view of the selected task is shown, including a 'Description' and 'Objects and attachments' section.

Ex.	Title	Status	Work Item ID	Creation Da	Creation P. At.	Co.	W.	Dynamic column
	Please approve the Purchase Order 4000010064	S	415455	22.07.2020	11:45:37			
	Please approve the Purchase Requisition 2001000963		415320	20.07.2020	02:34:58			
	Please approve the Purchase Requisition 2001000963		414579	20.07.2020	02:33:46			
	Please approve the Purchase Requisition 2001000962		414487	19.07.2020	15:13:42			
	Please approve the Purchase Requisition 2001000962		414486	19.07.2020	15:13:02			
	Please approve the Purchase Requisition 2001000961		415262	19.07.2020	15:10:39			
	Please approve the Purchase Requisition 2001000961		415261	19.07.2020	15:10:16			
	Please approve the Purchase Requisition 2001000959		415260	19.07.2020	15:10:03			
	Please approve the Purchase Requisition 2001000959		414485	19.07.2020	15:07:07			
	Please approve the Purchase Requisition 2001000959		414484	19.07.2020	15:06:38			
	Please approve the Purchase Requisition 2001000959		415258	19.07.2020	15:05:51			
	Please approve the Purchase Requisition 2001000959		415259	19.07.2020	15:05:51			
	Please approve the Purchase Requisition 2001000958		415228	17.07.2020	10:00:27			

**Please approve the Purchase Order 4000010064**

**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

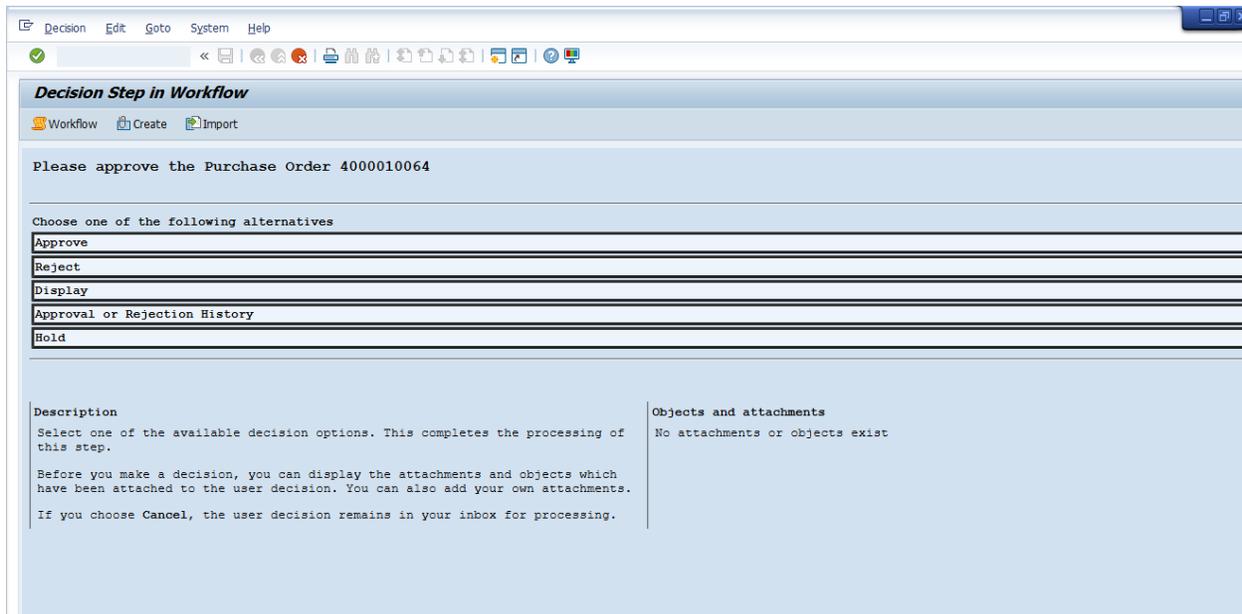
Activate Windows



## SAP User Manual for Preventive Maintenance

Double Click on the “**Please Approve Purchase Order 4000010064**” message. It will open the Purchase requisition 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.

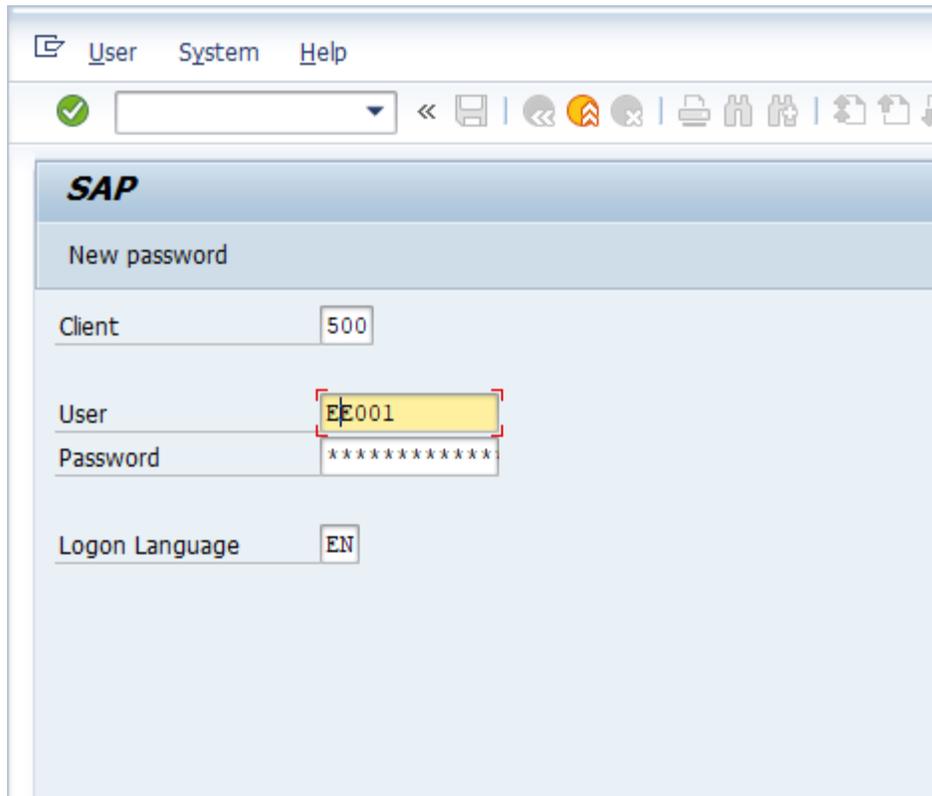
Purchase Order will be approved with level 1.

Purchase Order Approval Request notification is forwarded to Approver 2



## SAP User Manual for Preventive Maintenance

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



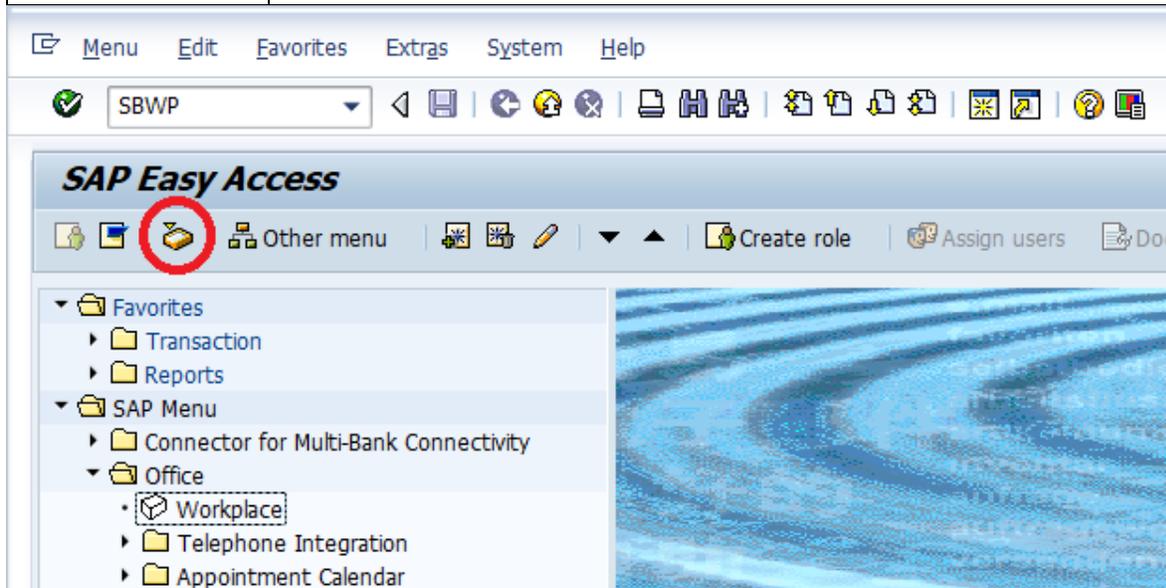
The screenshot shows the SAP login interface. At the top, there is a menu bar with 'User', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main area is titled 'SAP' and contains a 'New password' section. Below this, there are four input fields: 'Client' with the value '500', '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 Preventive 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 Preventive Maintenance

Expand “Inbox” button, under workflow “**Approve Purchase Order 4000010064**” message will appear.

Double Click on the “**Please Approve Purchase Order 4000010064**” message. System will open the Purchase Order document in Display mode.

The screenshot displays the SAP Workflow 27 interface. On the left, a navigation pane shows the 'Inbox' expanded, with 'Workflow 27' selected. The main area shows a list of messages with columns for 'Ex', 'Title', 'Status', 'Work Item ID', 'Creation Da', 'Creation P', 'At', 'Co', 'W', and 'Dynamic column'. The first message, 'Please approve the Purchase Order 4000010064', is highlighted. Below the list, a detailed view of this message is shown, including a 'Description' field with instructions and an 'Objects and attachments' field.

Ex	Title	Status	Work Item ID	Creation Da	Creation P	At	Co	W	Dynamic column
	Please approve the Purchase Order 4000010064		415455	22.07.2020	11:45:37	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 2001000959		415259	19.07.2020	15:05:51	5			
	Please approve the Purchase Requisition 2001000958		415228	17.07.2020	10:00:27	5			

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



## SAP User Manual for Preventive Maintenance

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

Decision Step in Workflow

Workflow Create Import

Please approve the Purchase Order 4000010064

Choose one of the following alternatives

Approve
Reject
Display
Approval or Rejection History
Hold

Description

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.

Objects and attachments

No attachments or objects exist

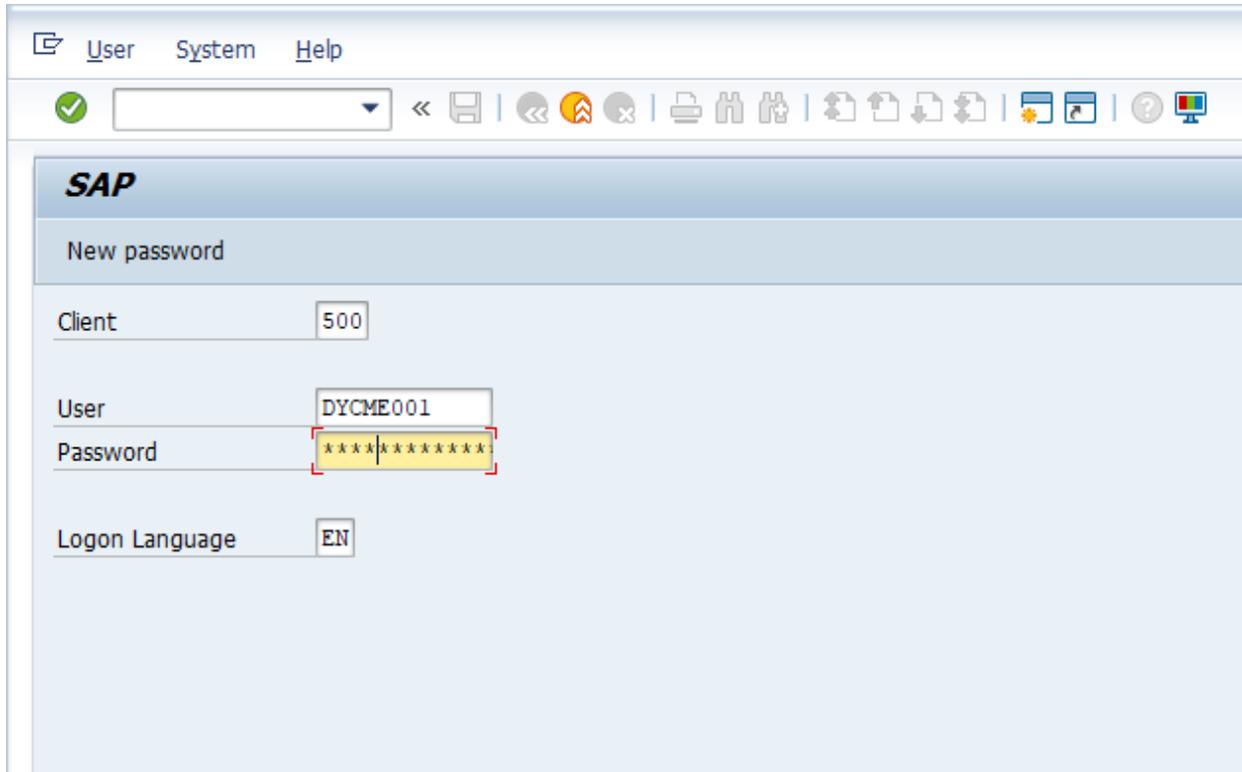
Purchase Order will be approved with level 2.

Purchase Order Approval Request notification is forwarded to Approver 3.



## SAP User Manual for Preventive 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 a 'New password' section. Below this, there are four input fields: 'Client' with the value '500', 'User' with the value 'DYCME001', 'Password' with a masked value '\*\*\*\*\*', and 'Logon Language' with the value 'EN'. The password field is highlighted with a red border.

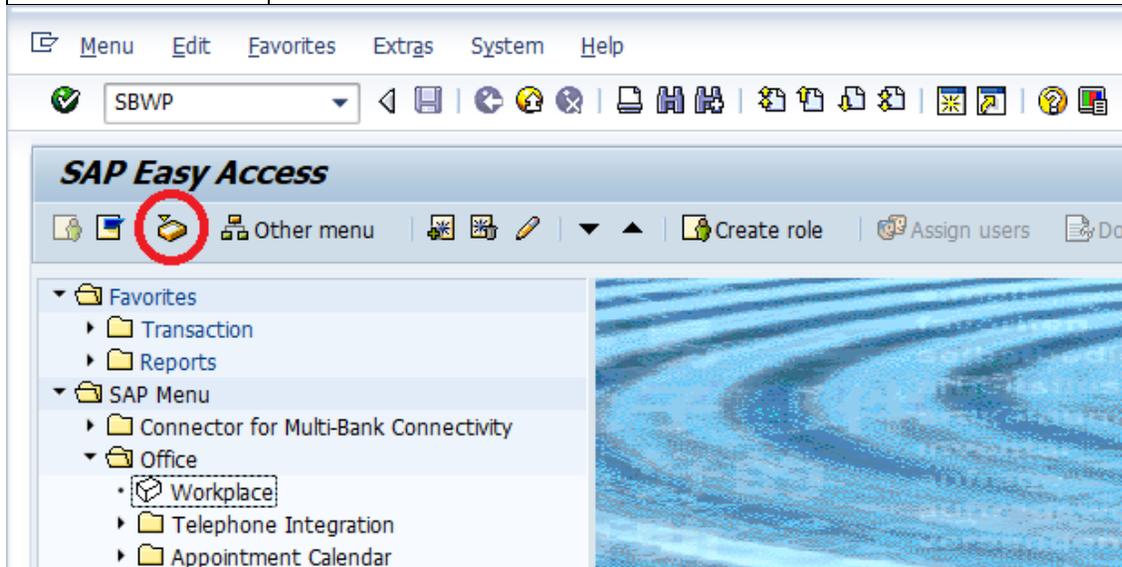


## SAP User Manual for Preventive Maintenance

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

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

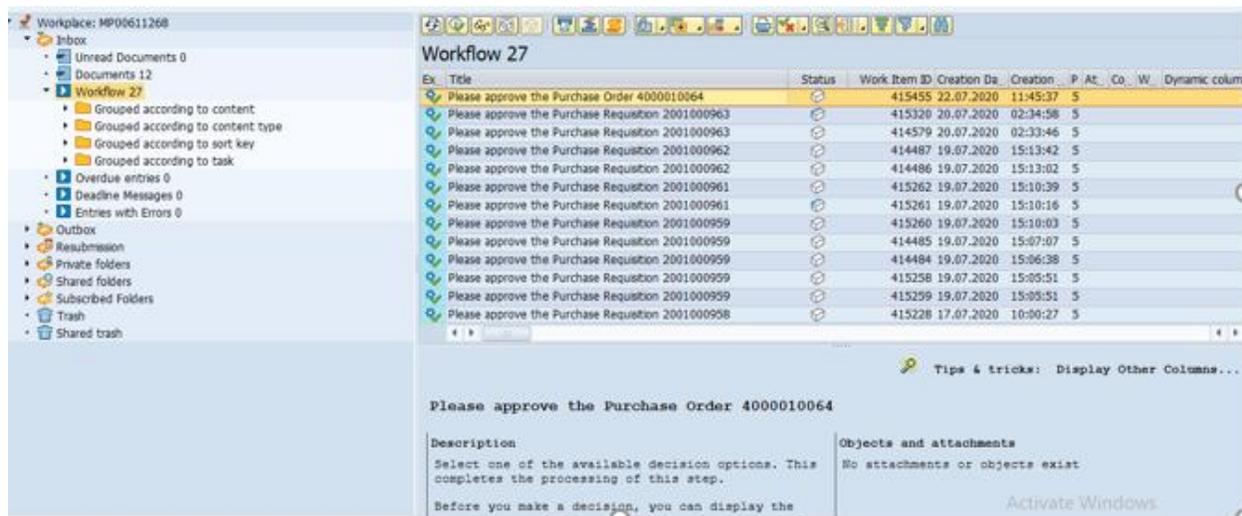
Transaction Code	SBWP
Menu Path	Easy Access → SAP Menu → Office → Workplace



## SAP User Manual for Preventive Maintenance

Expand “Inbox” button, under workflow “Approve Purchase Order 4000010064” message will appear.

Double Click on the “Please Approve Purchase Order 4000010064” message. System will open the Purchase Order document in Display mode.



The screenshot displays the SAP Workflow 27 interface. On the left, a navigation pane shows the 'Inbox' expanded, with 'Workflow 27' selected. The main area shows a list of tasks with columns for Title, Status, Work Item ID, Creation Date, and Creation Time. The first task, 'Please approve the Purchase Order 4000010064', is highlighted. Below the list, a detailed view of this task is shown, including a description and a section for objects and attachments.

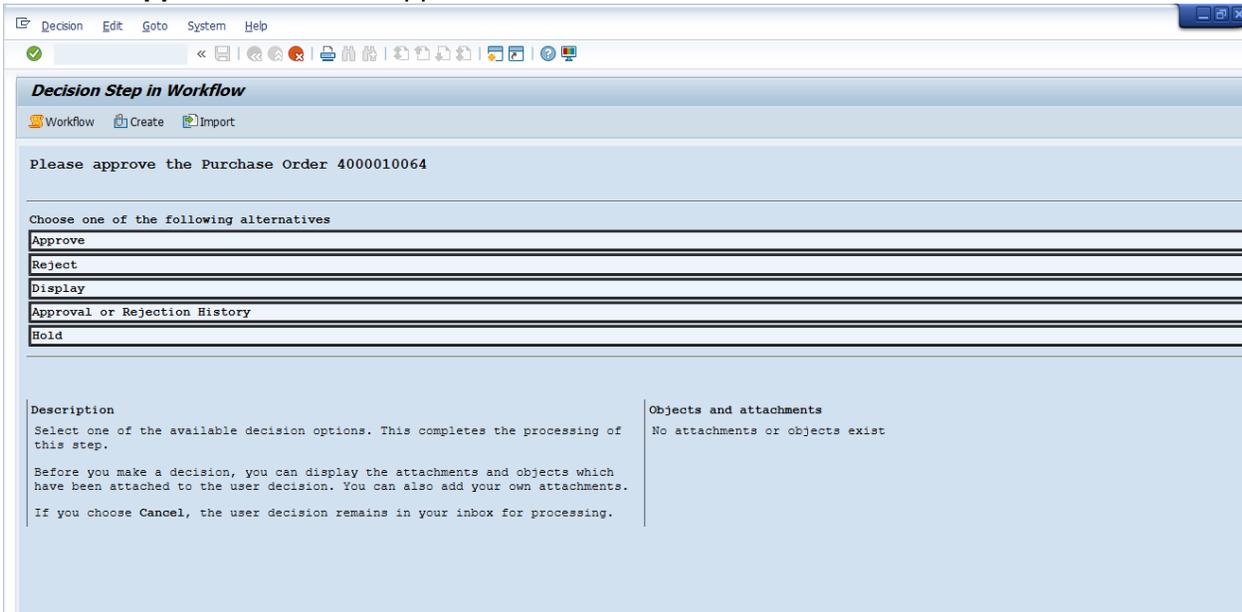
Ex	Title	Status	Work Item ID	Creation Date	Creation Time	P. At.	Co.	W.	Dynamic column
	Please approve the Purchase Order 4000010064		415455	22.07.2020	11:45:37	5			
	Please approve the Purchase Requisition 2001000963		415320	20.07.2020	02:34:58	5			
	Please approve the Purchase Requisition 2001000963		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 2001000959		415259	19.07.2020	15:05:51	5			
	Please approve the Purchase Requisition 2001000958		415228	17.07.2020	10:00:27	5			

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



## SAP User Manual for Preventive Maintenance

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



Purchase Order will be approved with level 3.

Purchase Order Approval Request notification is forwarded to Approver 4.



## SAP User Manual for Preventive 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 as follows:

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

A red arrow points to the Client field.

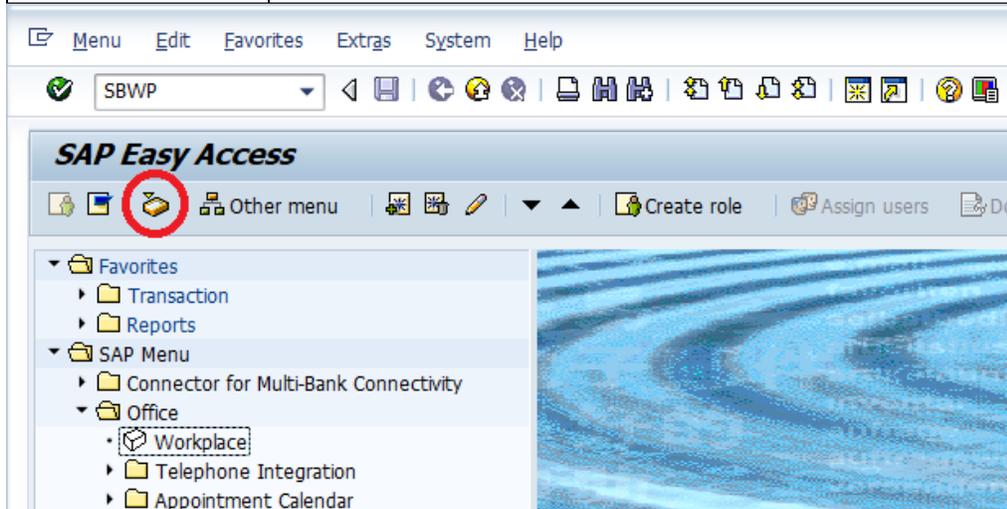


## SAP User Manual for Preventive Maintenance

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 Preventive Maintenance

Expand “Inbox” button, under workflow “Approve Purchase Order 4000010064” message will appear.

The screenshot shows the SAP inbox interface. On the left, the 'Inbox' folder is expanded, showing a workflow task titled 'Please approve the Purchase Order 4000010064'. 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 4000010064		415455	22.07.2020	11:45:37	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 2001000959		415259	19.07.2020	15:05:51	5			
	Please approve the Purchase Requisition 2001000958		415228	17.07.2020	10:00:27	5			

Below the table, the selected workflow item is expanded, showing the task description: 'Please approve the Purchase Order 4000010064'. The description includes 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' section is empty, stating 'No attachments or objects exist'. There is an 'Activate Windows' watermark in the bottom right corner.

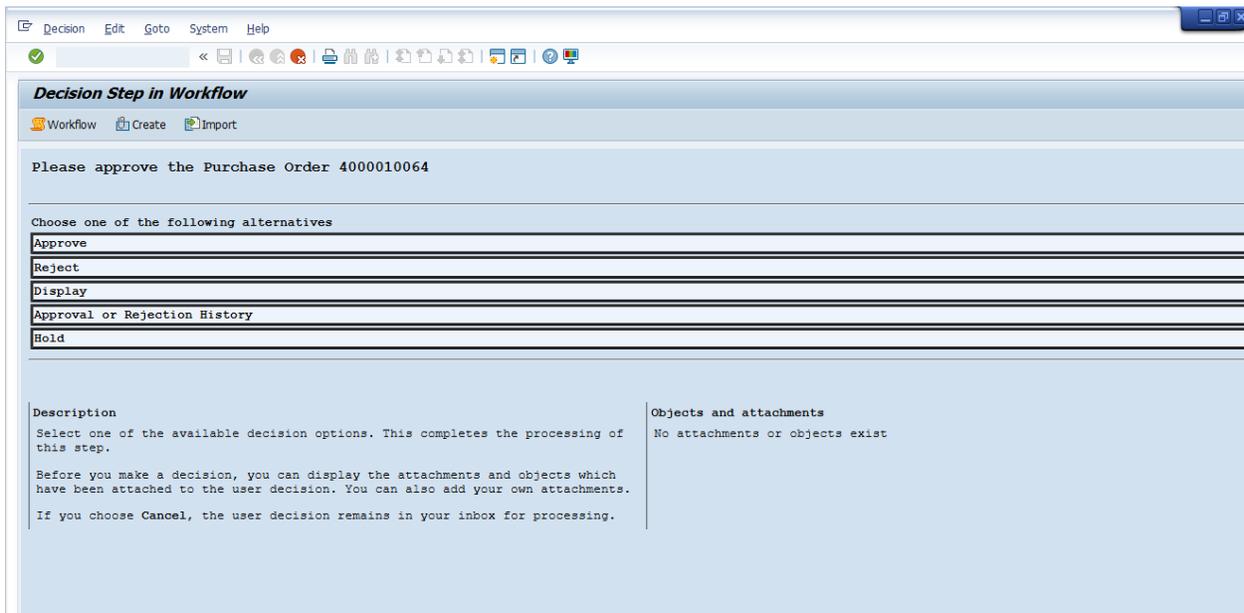


## SAP User Manual for Preventive Maintenance

Double Click on the “**Please Approve Purchase Order 4000010064**” 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 Preventive 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 a folder structure under 'Workplace: MP00611268', including 'Inbox', 'Unread Documents 5', 'Documents 17', and 'Workflow 26'. The main area is titled 'Unread Documents 5' and contains a table with the following data:

Me...	Ty...	Title	At...	Author	Date recei...	Co...	Re...	Recip...
✉	✉	Purchase Order 4000010064 is approved.		SAP_WFRT	22.07.2020			1
✉	✉	Purchase Order 4000010064 is approved.		SAP_WFRT	22.07.2020			1
✉	✉	Purchase Order 4000010064 is approved.		SAP_WFRT	22.07.2020			1
✉	✉	Purchase Order 4000010064 is approved.		SAP_WFRT	22.07.2020			1
✉	✉	Purchase Order 4000010064 is approved.		SAP_WFRT	22.07.2020			1

Below the table, the notification text reads: 'Purchase Order 4000010064 is approved. Hello Sir/Madam, Purchase Order 4000010064 is approved. Approved by: MP00611268 MP00611268. Regards,'



# SAP User Manual for Preventive Maintenance

## Display of Purchase Order

Enter T code ME23N and Enter the other Purchase order No 4000010064 and select Release Strategy System shows that purchase order released all four levels.

The screenshot displays the SAP ME23N interface for purchase order 4000010064. The document title is "Release STD Purchase Order 4000010064". The vendor is "40000442 FELIX ENGG. CO." and the document date is "20.07.2020". The release strategy is "D1 Rel Strategy for PO". The release indicator is "Released".

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

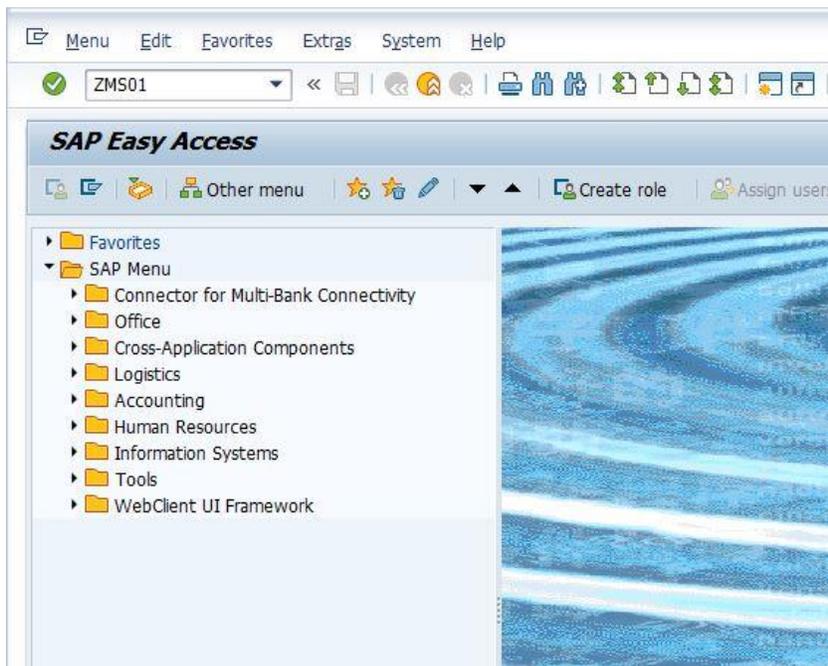
S...	Itm	A	I	Material	Short Text	PO Quantity	O...	C Deliv. Date	Net Price	Curr...	Per	O...	Matl Group	PInt	Stor. L...
	1	F	D		Preventive Maint by Exte...		1 AU	D 24.09.2020	10,000.00	INR	1	AU	Constructio...	Mumbai Port Trust	
										INR					
										INR					
										INR					
										INR					
										INR					



## SAP User Manual for Preventive Maintenance

### Create/ Change Measurement Sheet

Enter Transaction code ZMS01 in command Bar



In Create Measurement Sheet Screen, provide below details;

Service Order: 4000010064

Company Code: 1000

System will display Service line item details from service purchase order.

Confidential Document

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Accepting No Limits

Alternative Thinking

Driving Positive Change



## SAP User Manual for Preventive Maintenance

Click on “ **Input Measurements** ” Input measurement Button. System will open Backup sheet screen

The screenshot shows the SAP 'Create Measurement Sheet' interface. At the top, there are fields for Service Order (4000010064), Company Code (1000), Mumbai Port Trust, Plant (1000), and Doc. Date (20.07.2020). Below these are fields for Vendor (40000442) and FELIX ENGG. CO. The 'Attachments' section includes fields for Doc. Type and File name. The 'Services for Item' table is visible, with the following data:

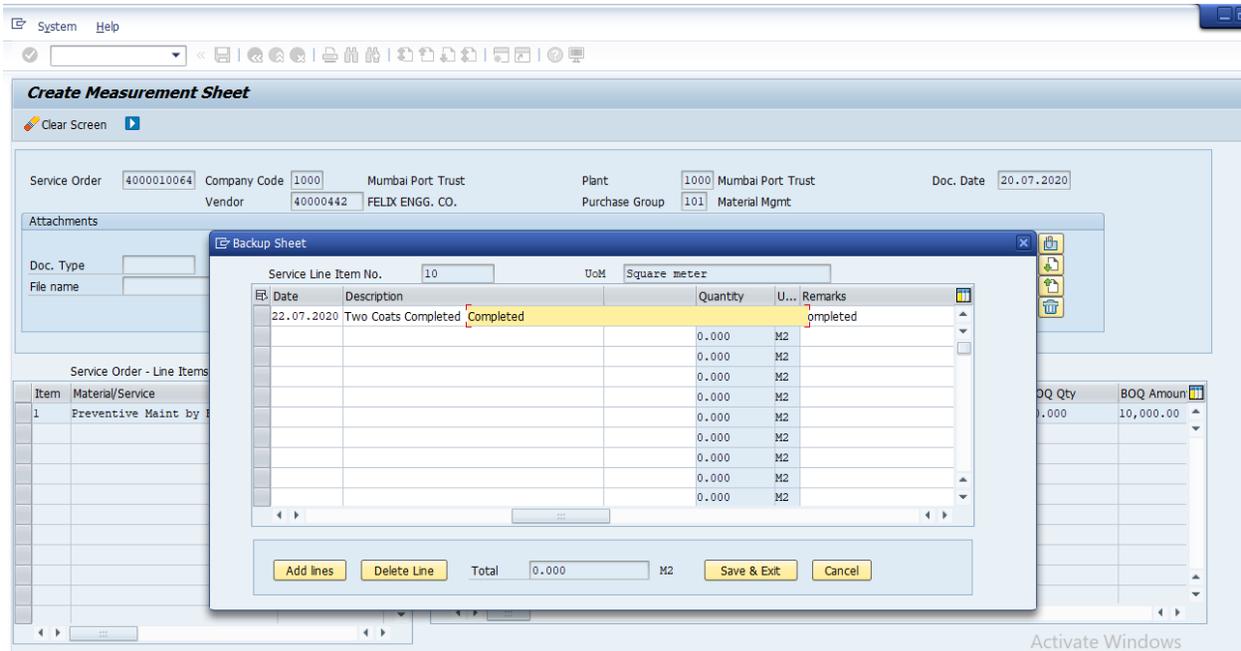
Line	Service No	Description	Text	Input Measurements	BOQ Qty	BOQ Amount
10	8300000085	Two Coats - Oil Bound Distemper		<b>Input Measurements</b>	10.000	10,000.00

In Back up screen, record the service activity details.

Click on “ **Save & Exit** ” Button



## SAP User Manual for Preventive Maintenance



System will Update the data recorded against the service line item. Current JMS Quantity will be updated in Measurement sheet.

Click on “  ” icon



## SAP User Manual for Preventive Maintenance

The screenshot shows the SAP 'Display Measurement Sheet' interface. At the top, there are fields for Service Order (4000010064), Company Code (1000), Mumbai Port Trust, Plant (1000), Mumbai Port Trust, and Doc. Date (20.07.2020). Below these are fields for JMS No. (1100000010), Vendor (40000442), FELIX ENGG. CO., and Purchase Group (101), Material Mgmt. An 'Attachments' table is empty. The main area contains two tables: 'Service Order - Line Items' and 'Services for Item'. The 'Services for Item' table is highlighted with a yellow box and contains the following data:

Line	Service No	Description	Text	Input Measurements	BOQ Qty	BOQ Amount
10	8300000085	Two Coats - Oil Bound Distemper	Input Measurements	10.000	10,000.00	

At the bottom of the screenshot, a status bar shows a green checkmark and the message: 'JMS: 1100000010 Successfully created.'

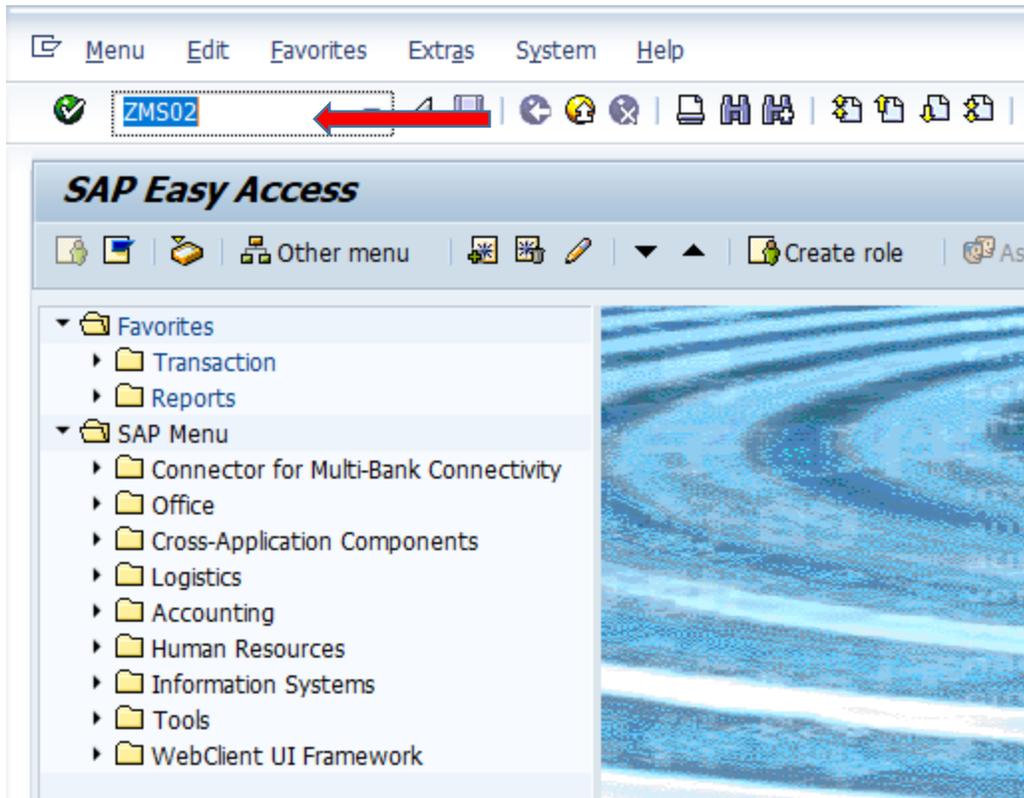
System will Create Measurement sheet & displays “ JMS: 1100000010 Successfully created.” Message.



## SAP User Manual for Preventive Maintenance

### Change Measurement Sheet:

Enter Transaction Code ZMS02 in the Command Bar.





## SAP User Manual for Preventive Maintenance

Enter following data.

Company Code: 1000

JMS No:1100000010.

And Press “Enter”

Click on “” Workflow will be initiated

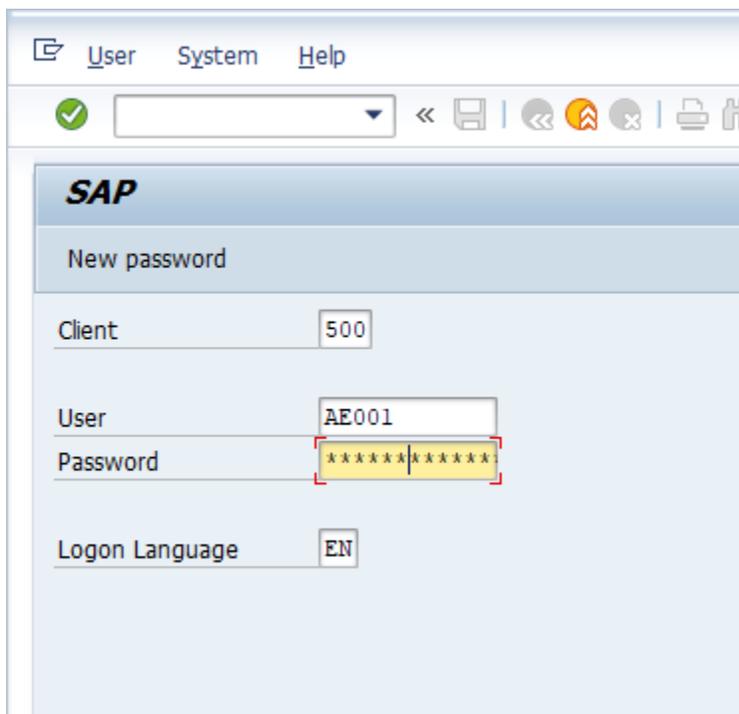
The screenshot displays the SAP 'Change Measurement Sheet' interface. At the top, there are navigation buttons and a title bar. Below the title bar, there are input fields for Service Order (4000010064), Company Code (1000), Vendor (40000442), Plant (1000), and Purchase Group (101). The document date is set to 20.07.2020. An 'Attachments' section is visible with fields for Doc. Type and File name. Below this, there are two tables: 'Service Order - Line Items' and 'Services for Item'. The 'Services for Item' table shows a line item for 'Preventive Maint by External Vendor' with a quantity of 1.000 and a BOQ amount of 10,000.00. At the bottom of the interface, a status bar indicates 'Workflow Released for Approval' with a green checkmark icon.



## SAP User Manual for Preventive 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 menu, and several icons. The main area is titled 'SAP' and contains the following fields:

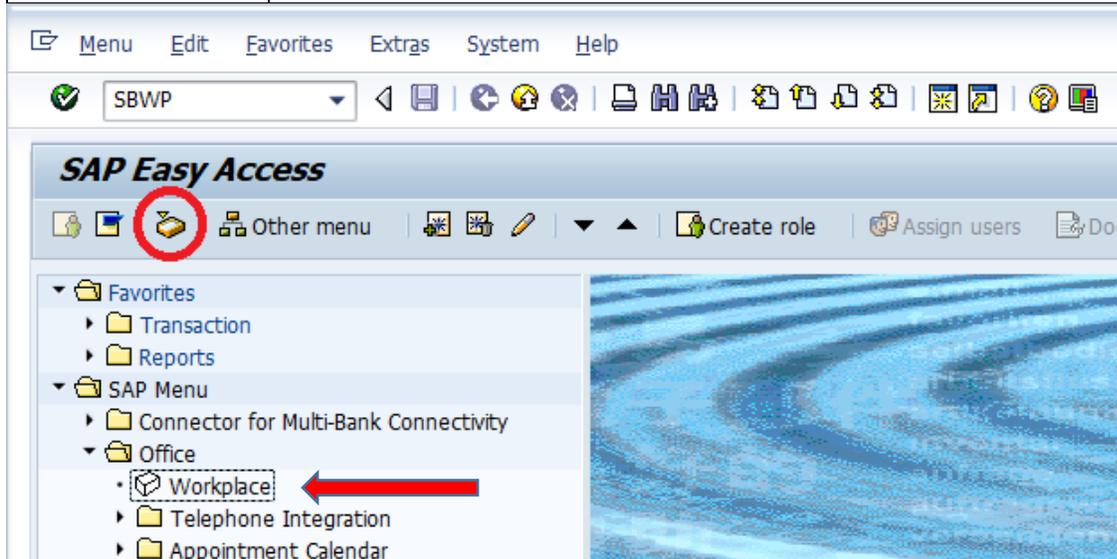
Client	500
User	AE001
Password	*****
Logon Language	EN

## SAP User Manual for Preventive 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 “Please Approve JMS 110000010 “message will appear



# SAP User Manual for Preventive Maintenance

The screenshot shows the SAP Business Workplace interface for user MP00611268. The main window displays a list of workflow items under the heading 'Workflow 28'. The list includes columns for 'Ex.', 'Title', 'Status', 'Work Item ID', 'Creation Date', 'Creation Time', 'Priority', 'Company Code', 'Work Item', and 'Dynamic color'. The first item is highlighted in yellow.

Ex.	Title	Status	Work Item ID	Creation Date	Creation Time	P.	At.	Co.	W.	Dynamic color
415456	Please approve the JMS 1100000010		415456	22.07.2020	12:23:46	5				
414818	Please approve the Purchase Order 4000010064		414818	22.07.2020	11:52:04	5				
415320	Please approve the Purchase Requisition 2001000963		415320	20.07.2020	02:34:58	5				
414579	Please approve the Purchase Requisition 2001000963		414579	20.07.2020	02:33:46	5				
414487	Please approve the Purchase Requisition 2001000962		414487	19.07.2020	15:13:42	5				
414486	Please approve the Purchase Requisition 2001000962		414486	19.07.2020	15:13:02	5				
415262	Please approve the Purchase Requisition 2001000961		415262	19.07.2020	15:10:39	5				
415261	Please approve the Purchase Requisition 2001000961		415261	19.07.2020	15:10:16	5				
415260	Please approve the Purchase Requisition 2001000959		415260	19.07.2020	15:10:03	5				
414485	Please approve the Purchase Requisition 2001000959		414485	19.07.2020	15:07:07	5				
414484	Please approve the Purchase Requisition 2001000959		414484	19.07.2020	15:06:38	5				
415258	Please approve the Purchase Requisition 2001000959		415258	19.07.2020	15:05:51	5				
415259	Please approve the Purchase Requisition 2001000959		415259	19.07.2020	15:05:51	5				

Below the list, there is a section for 'Please approve the JMS 1100000010' with a 'Description' and 'Objects and attachments' area. A tip suggests to 'Group Work Items According to Tasks..'. An 'Activate Windows' watermark is visible in the bottom right corner.

System will open the JMS document for line item wise approval.

Select the line item & Click on “ Post ” button.

The screenshot shows the SAP JSM Workflow interface. A table displays details for a selected line item. The 'Post' button is visible in the top right corner of the table area.

Select line	Level1	Level2	Level3	Level4	JMS Number	Company Code	Service order	Item No	Vendor	Vendor name	Doc.Date	Plant	Service/Material	Quantity	UoM	Service No	Service item No	Description
<input checked="" type="checkbox"/>					1100000010	1000	4000010064	1	40000442	FELIX ENGG. CO.	20.07.2020	1000	Preventive Maint by External Vendor	1.000	AU	8300000085	10	Two Coats -

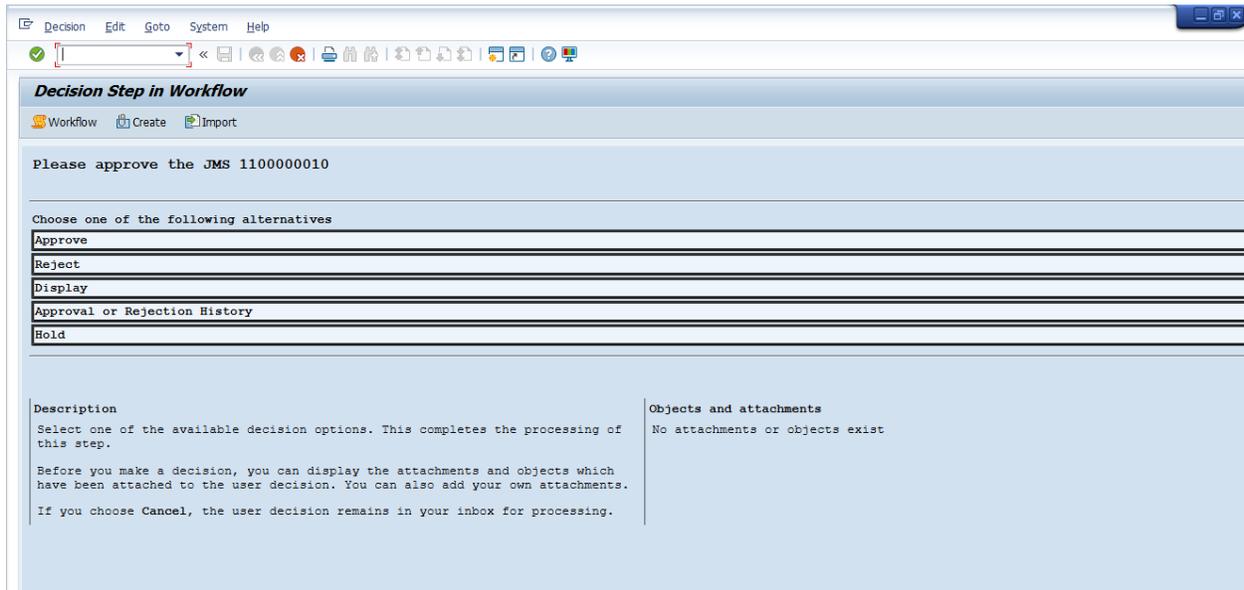
Click on “ ” icon to confirm the selected line items.



## SAP User Manual for Preventive Maintenance



Click on “Approve” Button to approve the Measurement Sheet.



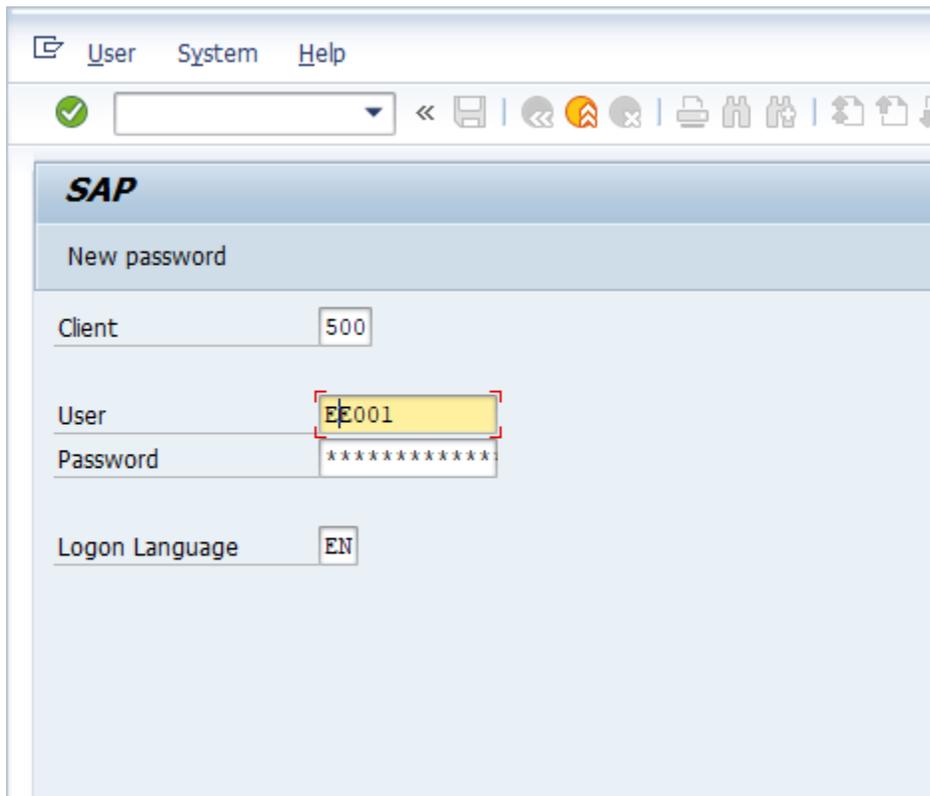
Measurement Sheet will be approved with level 1.

Measurement Sheet Approval Request notification is forwarded to Approver 2.



## SAP User Manual for Preventive Maintenance

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



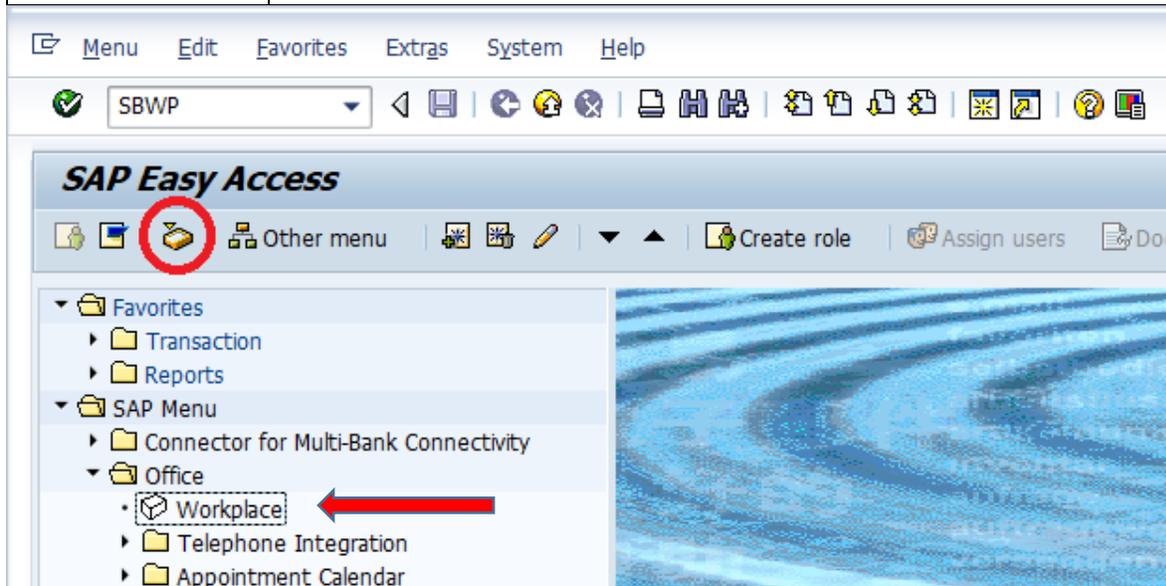
The screenshot shows the SAP login interface. At the top, there is a navigation bar with 'User', 'System', and 'Help' menus. Below this is a toolbar with various icons. The main content area is titled 'SAP' and contains a 'New password' section. Below that, there are four input fields: 'Client' with the value '500', 'User' with the value 'EE001', 'Password' with a masked value of '\*\*\*\*\*', and 'Logon Language' with the value 'EN'. The 'User' field is highlighted with a red border.

## SAP User Manual for Preventive 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 Preventive Maintenance

Expand “Inbox” button, under workflow “Please Approve JMS 110000010 “message will appear

The screenshot displays the SAP Business Workplace interface for user MP00611268. The left sidebar shows the 'Inbox' expanded, with 'Workflow 28' selected. The main area shows a table of workflow items:

Ex.	Title	Status	Work Item ID	Creation Da...	Creation ...	P At...	Co...	W...	Dynamic colu
	Please approve the JMS 110000010		415456	22.07.2020	12:23:46	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 2001000959		415259	19.07.2020	15:05:51	5			

Below the table, the selected task 'Please approve the JMS 110000010' is shown with a description: '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 indicates 'No attachments or objects exist'. A 'Tips & tricks' section suggests 'Group Work Items According to Tasks...'. An 'Activate Windows' watermark is visible at the bottom right.



## SAP User Manual for Preventive Maintenance

System will open the JMS document for line item wise approval.  
Select the line item & Click on “ **Post** ” button.

The screenshot shows the SAP JSM Workflow interface. At the top, there is a menu bar with 'List', 'Edit', 'Settings', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main area is titled 'JSM Workflow' and contains a table with the following data:

Select line	Level1	Level2	Level3	Level4	JMS Number	Company Code	Service order	Item No	Vendor	Vendor name	Doc.Date	Plant	Service/Material	Quantity	UoM	Service No	Service Item No	Description
<input checked="" type="checkbox"/>					1100000010	1000	4000010064	1	40000442	FELIX ENGG. CO.	20.07.2020	1000	Preventive Maint by External Vendor	1.000	AJ	8300000085	10	Two Coats -

Click on “  ” icon to confirm the selected line items.



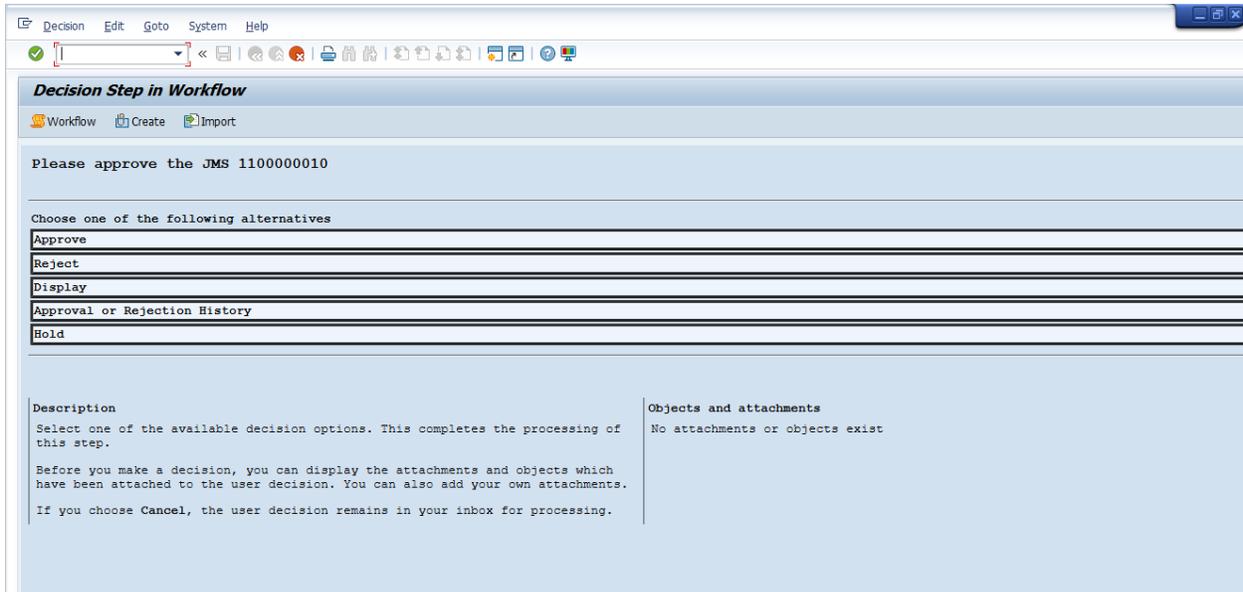
## SAP User Manual for Preventive Maintenance



Click on “Approve” Button to approve the Measurement Sheet.



## SAP User Manual for Preventive Maintenance



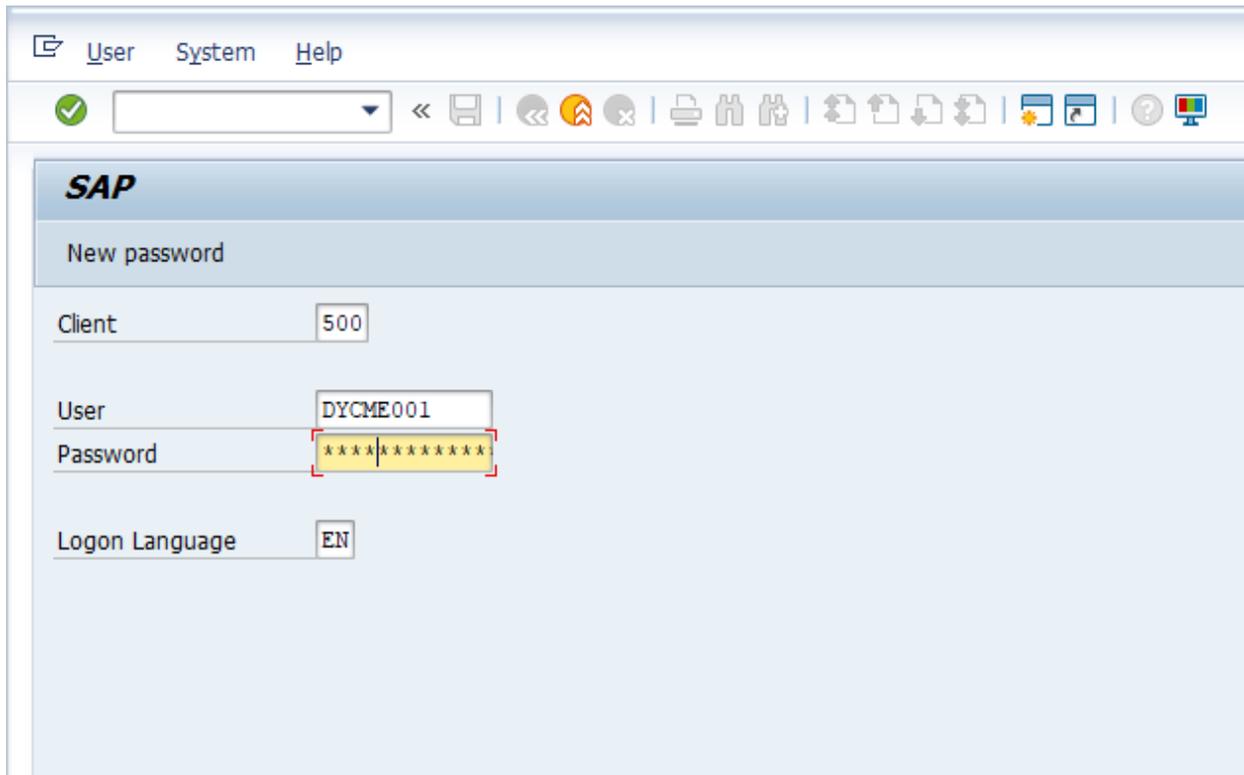
Measurement Sheet will be approved with level 2.

Measurement Sheet Approval Request notification is forwarded to Approver 3.



## SAP User Manual for Preventive Maintenance

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



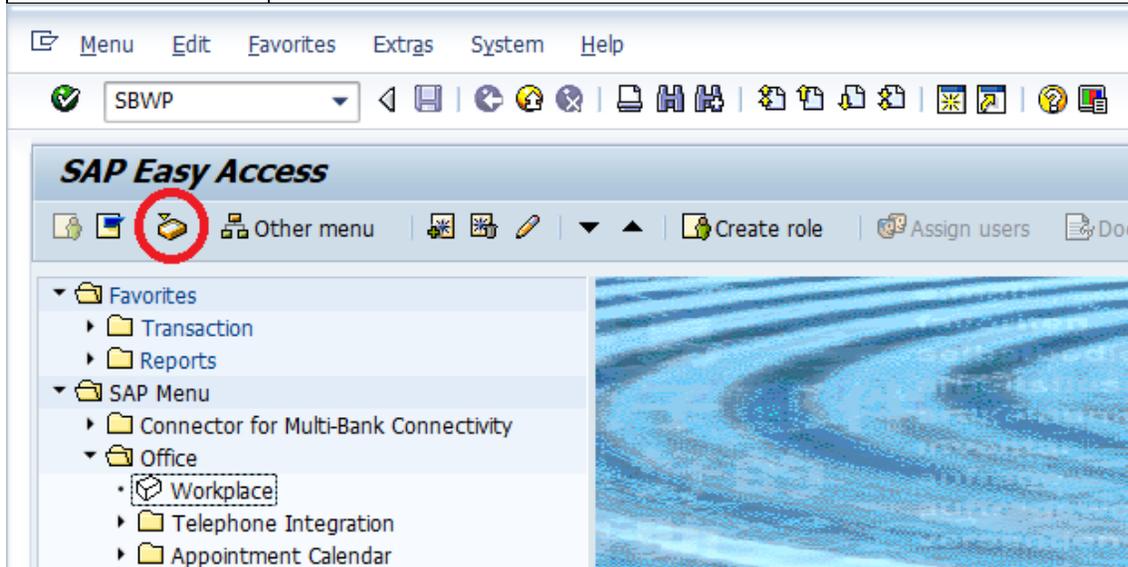
The screenshot shows the SAP login interface. At the top, there is a menu bar with 'User', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main content area is titled 'SAP' and contains a 'New password' section. Below this, there are four input fields: 'Client' with the value '500', 'User' with the value 'DYCME001', 'Password' with a masked value '\*\*\*\*\*', and 'Logon Language' with the value 'EN'. The password field is highlighted with a red border.

## SAP User Manual for Preventive 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 Preventive Maintenance

Expand "Inbox" button, under workflow "Please Approve JMS 110000010 "message will appear

The screenshot shows the SAP Business Workplace interface for user MP00611268. The left sidebar shows the navigation tree with 'Workplace: MP00611268' expanded to 'Inbox', where 'Workflow 28' is selected. The main area displays a table of workflow items:

Ex.	Title	Status	Work Item ID	Creation Da...	Creation ...	P. At...	Co... W...	Dynamic colu
	Please approve the JMS 110000010		415456	22.07.2020	12:23:46	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 2001000959		415259	19.07.2020	15:05:51	5		

Below the table, the selected workflow item 'Please approve the JMS 110000010' is shown with a description and objects/attachments section.

**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

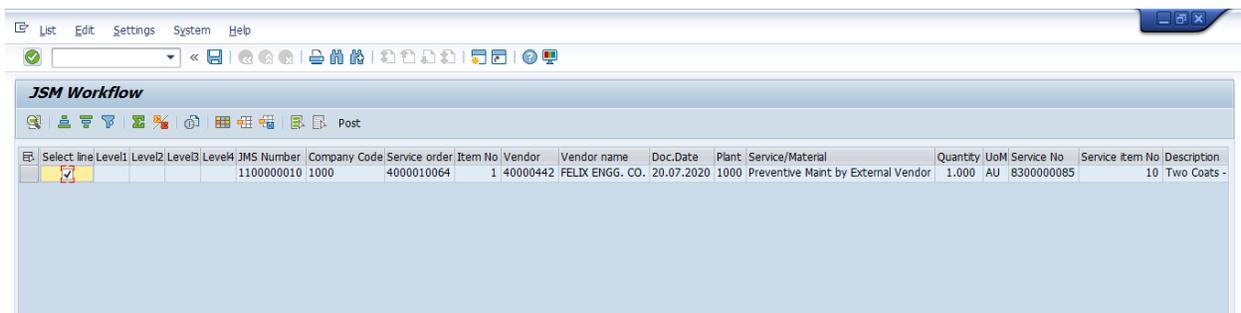
Activate Windows  
Go to Settings to activate Windows.



## SAP User Manual for Preventive Maintenance

System will open the JMS document for line item wise approval.

Select the line item & Click on “ **Post** ” button.



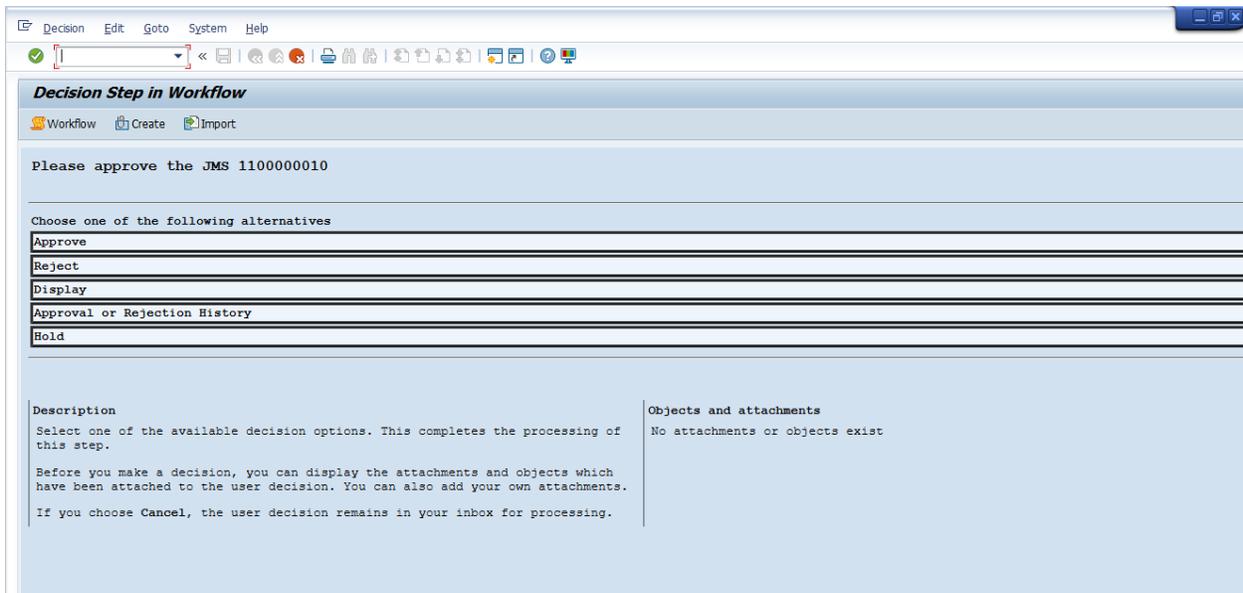
Click on “  ” icon to confirm the selected line items.





## SAP User Manual for Preventive Maintenance

Click on “Approve” Button to approve the Measurement Sheet.



Measurement Sheet will be approved with level 3.

Measurement Sheet Approval Request notification is forwarded to Approver 4.



## SAP User Manual for Preventive 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 the following fields:

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

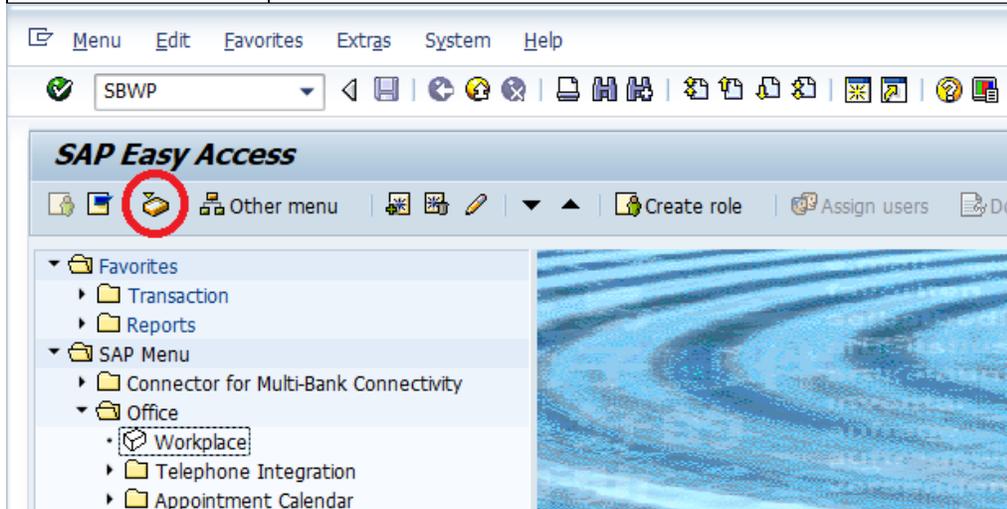
A red arrow points to the Client field.

## SAP User Manual for Preventive 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 Preventive Maintenance

Expand “Inbox” button, under workflow “Please Approve JMS 110000010 “message will appear

The screenshot displays the SAP Business Workplace interface for user MP00611268. The left sidebar shows the 'Inbox' expanded, with 'Workflow 28' selected. The main area shows a list of workflow items under 'Workflow 28'. The first item is highlighted: 'Please approve the JMS 110000010'. Below the list, the task description is visible, including a 'Description' section with instructions to select a decision option and a 'Tips & tricks' section.

Ex.	Title	Status	Work Item ID	Creation Da...	Creation ...	P. At...	Co... W...	Dynamic colu
	Please approve the JMS 110000010	✓	415456	22.07.2020	12:23:46	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 2001000959	✓	415259	19.07.2020	15:05:51	5		

**Workflow 28**

Please approve the JMS 110000010

**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

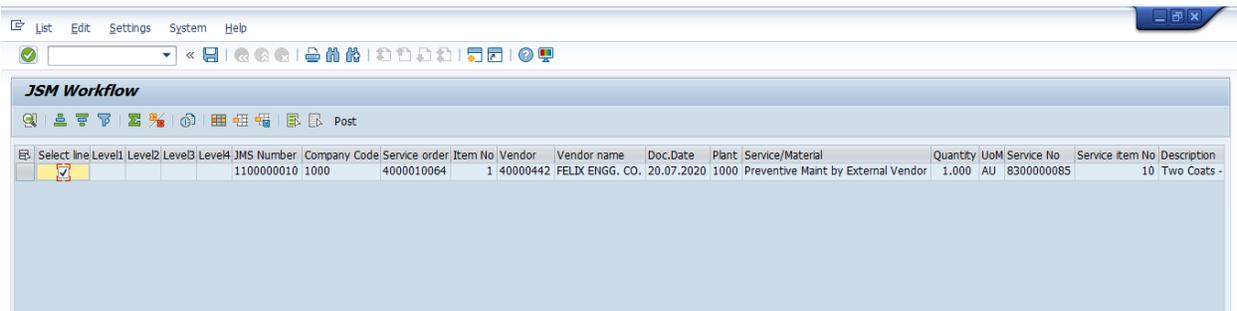
Tips & tricks: Group Work Items According to Tasks...

Activate Windows  
Go to Settings to activate Windows.



## SAP User Manual for Preventive Maintenance

System will open the JMS document for line item wise approval.  
Select the line item & Click on “ Post ” button.



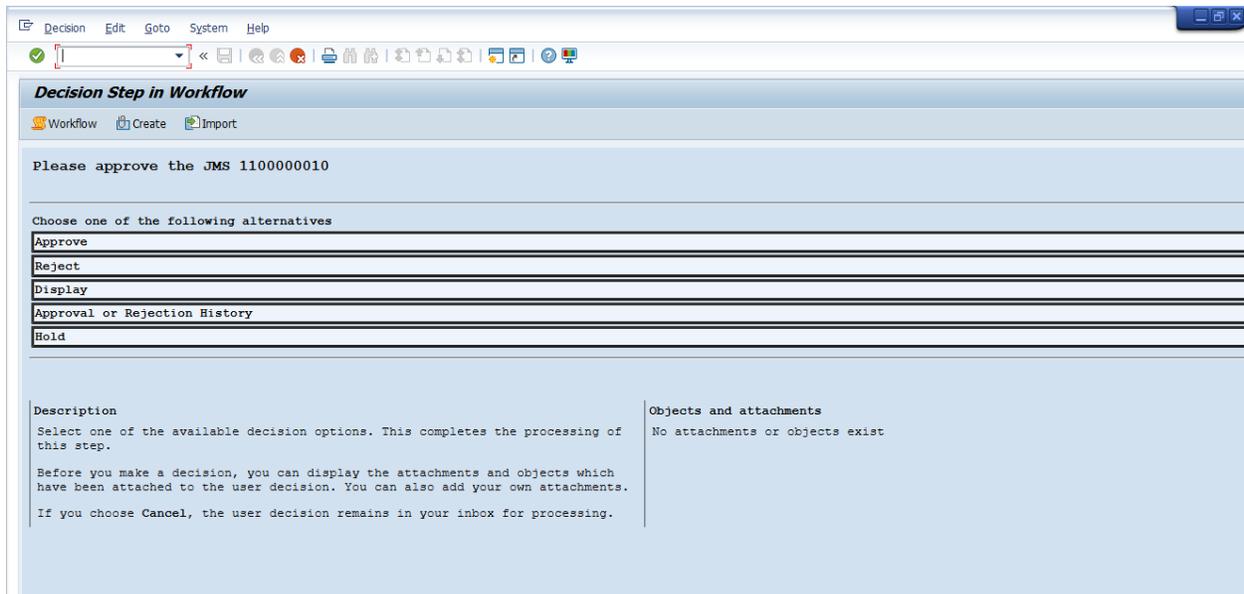
Click on “  ” icon to confirm the selected line items.





## SAP User Manual for Preventive Maintenance

Click on “Approve” Button to approve the Measurement Sheet.





## SAP User Manual for Preventive Maintenance

JMS will be approved with level 4.

Once the JMS is approved by all 4 level approvers, a notification is triggered to initiator stating “JMS 110000010 is approved”

The screenshot shows the SAP Business Workplace interface for user MP00611268. The left sidebar displays the folder structure, including 'Unread Documents 9'. The main pane shows a list of unread documents:

Me...	Ty...	Title	At...	Author	Date recei...	Co...	Re...	Recip...
[icon]	[icon]	JMS 1100000010 is approved.		SAP_WFRT	22.07.2020			1
[icon]	[icon]	JMS 1100000010 is approved.		SAP_WFRT	22.07.2020			1
[icon]	[icon]	JMS 1100000010 is approved.		SAP_WFRT	22.07.2020			1
[icon]	[icon]	JMS 1100000010 is approved.		SAP_WFRT	22.07.2020			1
[icon]	[icon]	JMS 1100000010 is approved.		SAP_WFRT	22.07.2020			1
[icon]	[icon]	Purchase Order 4000010064 is...		SAP_WFRT	22.07.2020			1
[icon]	[icon]	Purchase Order 4000010064 is...		SAP_WFRT	22.07.2020			1
[icon]	[icon]	Purchase Order 4000010064 is...		SAP_WFRT	22.07.2020			1
[icon]	[icon]	Purchase Order 4000010064 is...		SAP_WFRT	22.07.2020			1

Below the table, the email content is displayed:

**JMS 1100000010 is approved.**

Hello Sir/Madam,

JMS 1100000010 is approved.

Approved by: MP00611268 MP00611268

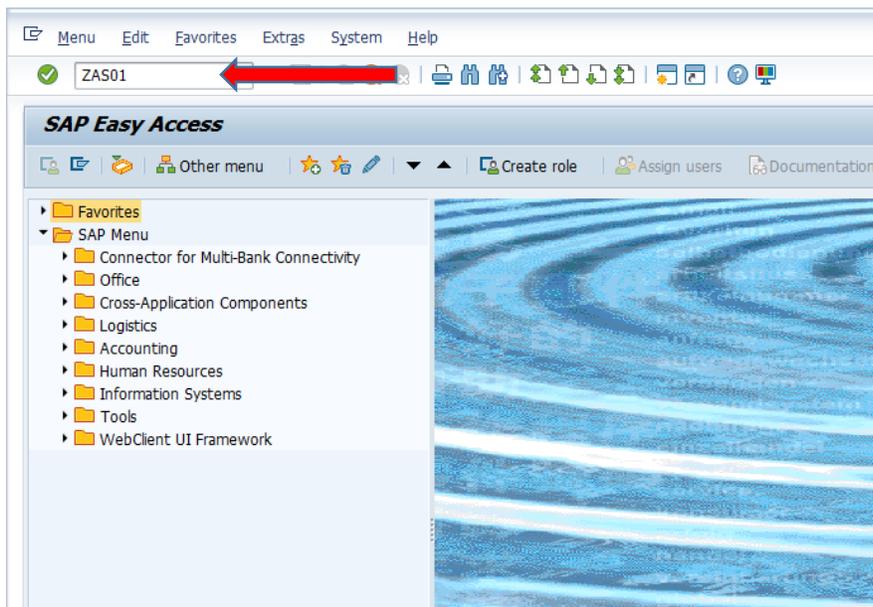
Regards,



## SAP User Manual for Preventive Maintenance

### Create/ Change Abstract:

Enter Transaction code ZAS01 in Command bar and press Enter







# SAP User Manual for Preventive Maintenance

System Help

**Create Abstract**

Clear Screen

Service Order: 4000010064 Company Code: 1000 Mumbai Port Trust Doc. Date: 20.07.2020  
 Plant: 1000 Purchase Group: 101  
 Vendor: 40000442 FELIX ENGG. CO.

List of Approved and open JMS

Select	JMS No	Created On	Created By	Changed On	Changed By	Approved
<input type="checkbox"/>	1100000010	22.07.2020	MP00611268			22.07.20

Process Selection

System Help

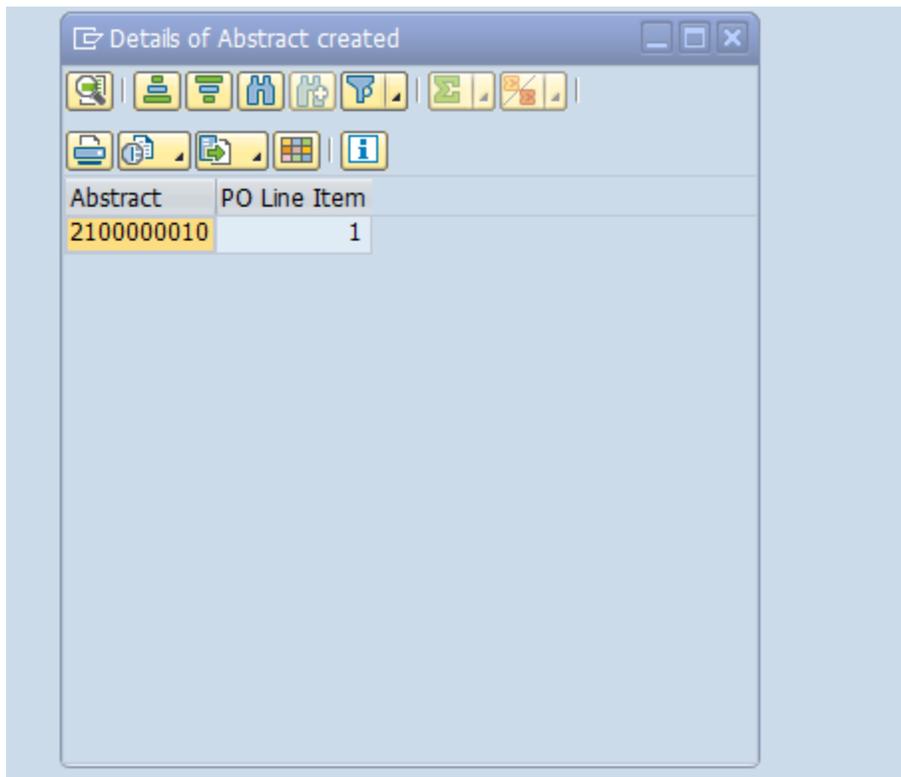
**Create Abstract**

JMS Doc No	PO Line Item	Material Description	PO Quantity	PO_UoM	Select	Line Number	Service Number	Service Text	Actual Quantity	Quantity	Service UoM
1100000010	1	Preventive Maint by External Vendor	1.000	AU	<input checked="" type="checkbox"/>	10	8300000085	Two Coats - Oil Bound Distemper	10.000	10.000	M2



## SAP User Manual for Preventive Maintenance

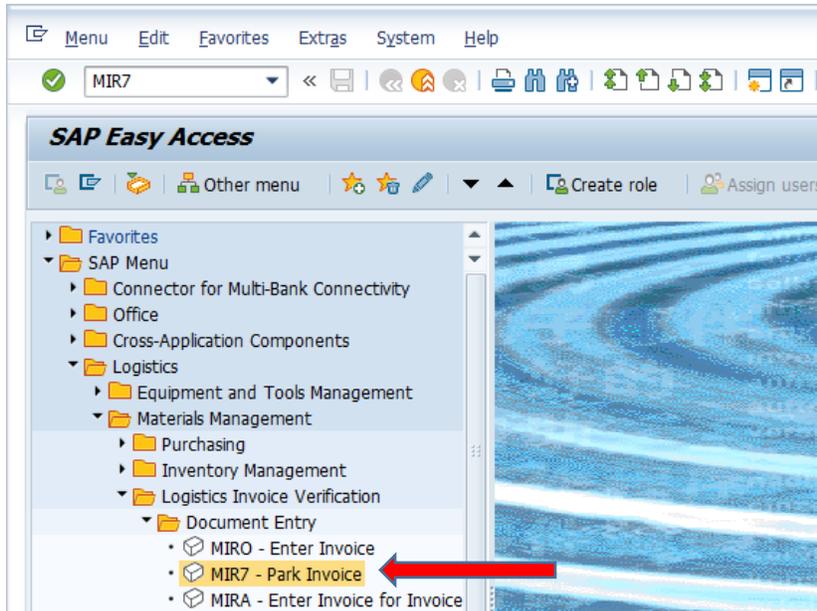
System will Create Abstract Document.



### Invoice Verification:

Enter Transaction code MIR7 in command Bar

## SAP User Manual for Preventive Maintenance



Enter Company Code: 1000 and click “” Continue icon.



In Park Incoming Invoice Screen, provide below details;

Invoice Date: 22.07.2020

Purchase order: 4000010064 & Press Enter.

Confidential Document

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## SAP User Manual for Preventive Maintenance

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 with various icons. The document title is 'Park Incoming Invoice: Company Code 1000'. Below the title, there are action buttons: Show PO structure, Hide worklist, Hold, Simulate, Save as Completed, Messages, Help, and NF. The 'Worklist' pane on the left shows folders for 'Held documents', 'Parked documents', and 'Docs complete for pos'. The main area is divided into several sections: 'Basic Data' (Invoice date: 22.07.2020, Posting Date: 22.07.2020, Amount: 10,000.00 INR, Tax Amount, Bus.Place/Sectn, Text, Paymt terms: Due immediately), 'Vendor' (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' (Purchase Order/Scheduling Agreement: 4000010064), and 'Material' (Goods/service items, Layout: All information). A table below shows the invoice items:

Item	Amount	Quantity	O...	Purchase ...	Item	PO Text	Central C
1	10,000.00			4000010064	1	Preventive Maint by External Vendor	

At the bottom, there are search fields for 'Item' and 'Search Term', and a page indicator '1 / 1'.



## SAP User Manual for Preventive Maintenance

System will copy details with reference to PO & Display. Select the Tax Code V1 & Select Calculate Tax Checkbox. Provide Base line date: 22.07.2020 in Payment Tab

The screenshot displays the SAP 'Invoice Document' window for 'Company Code 1000'. The 'Basic Data' tab is active, showing an invoice date of 22.07.2020 and a tax amount of 500.00. The 'Tax' section is configured with tax code 'V1 (CGST+SGST 5% In...)' and the 'Calculate Tax' checkbox is checked. The 'Payment' tab shows a balance of 10,500.00 INR. The 'Vendor' information includes FELIX ENGG. CO. and the 'Purchase Order/Scheduling Agreement' is 4000010064. A table below shows one item with an amount of 10,000.00 and a description 'Preventive Maint by External Vendor'.

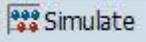
Item	Amount	Quantity	Purchase ...	Item	PO Text	Central Ck
	10,000.00		4000010064	1	Preventive Maint by External Vendor	

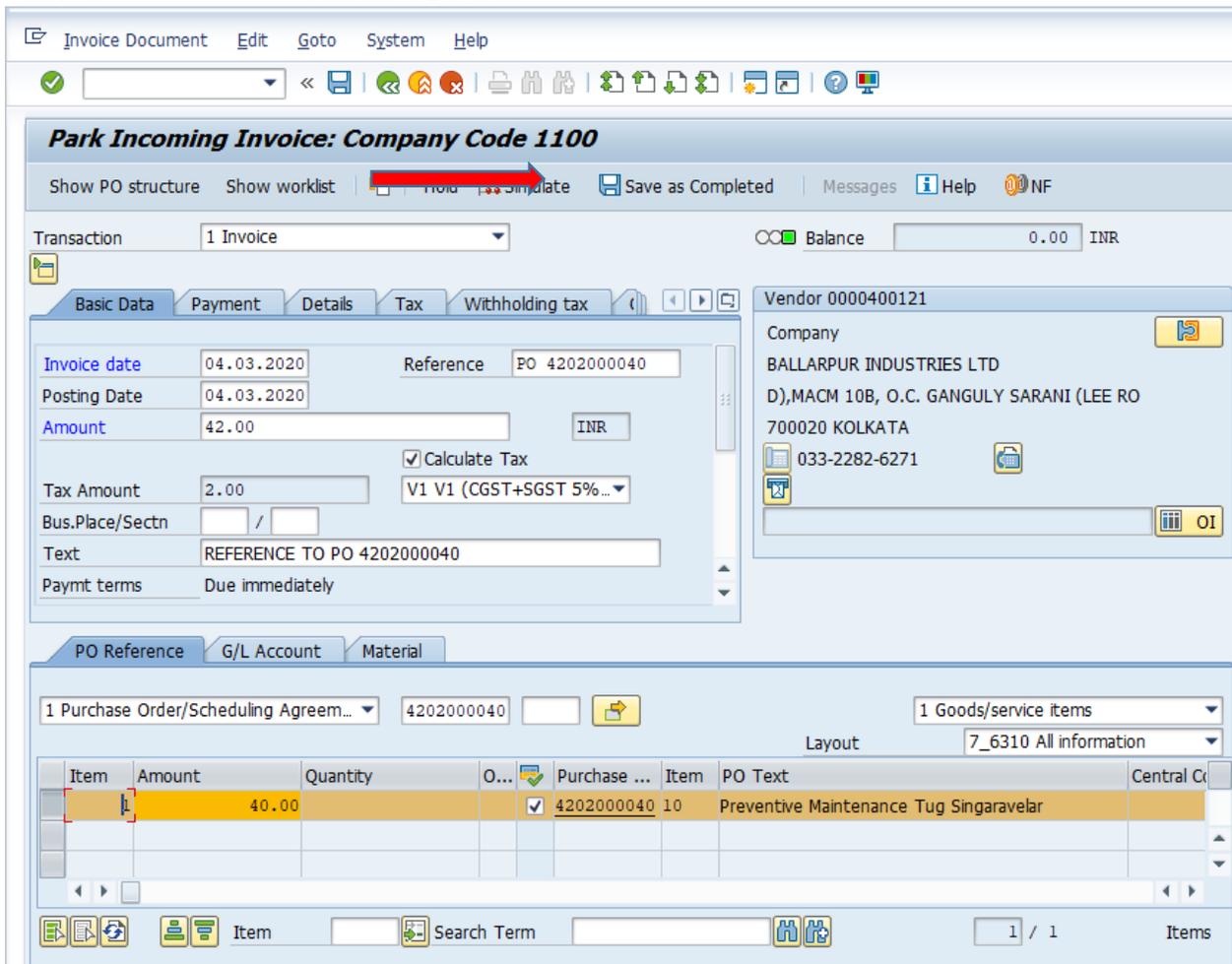


## SAP User Manual for Preventive Maintenance

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.



The screenshot displays the SAP Invoice Document interface for a 'Park Incoming Invoice'. The 'Tax' tab is active, showing the following details:

- Invoice date: 04.03.2020
- Posting Date: 04.03.2020
- Amount: 42.00 INR
- Tax Amount: 2.00
- Reference: PO 4202000040
- Calculate Tax:
- Tax Code: V1 V1 (CGST+SGST 5%...)
- Text: REFERENCE TO PO 4202000040
- Paymt terms: Due immediately

The Vendor information is also visible:

- Vendor: 0000400121
- Company: BALLARPUR INDUSTRIES LTD
- Address: D),MACM 10B, O.C. GANGULY SARANI (LEE RO 700020 KOLKATA
- Phone: 033-2282-6271

The PO Reference section shows:

- 1 Purchase Order/Scheduling Agreem... 4202000040
- 1 Goods/service items
- Layout: 7\_6310 All information

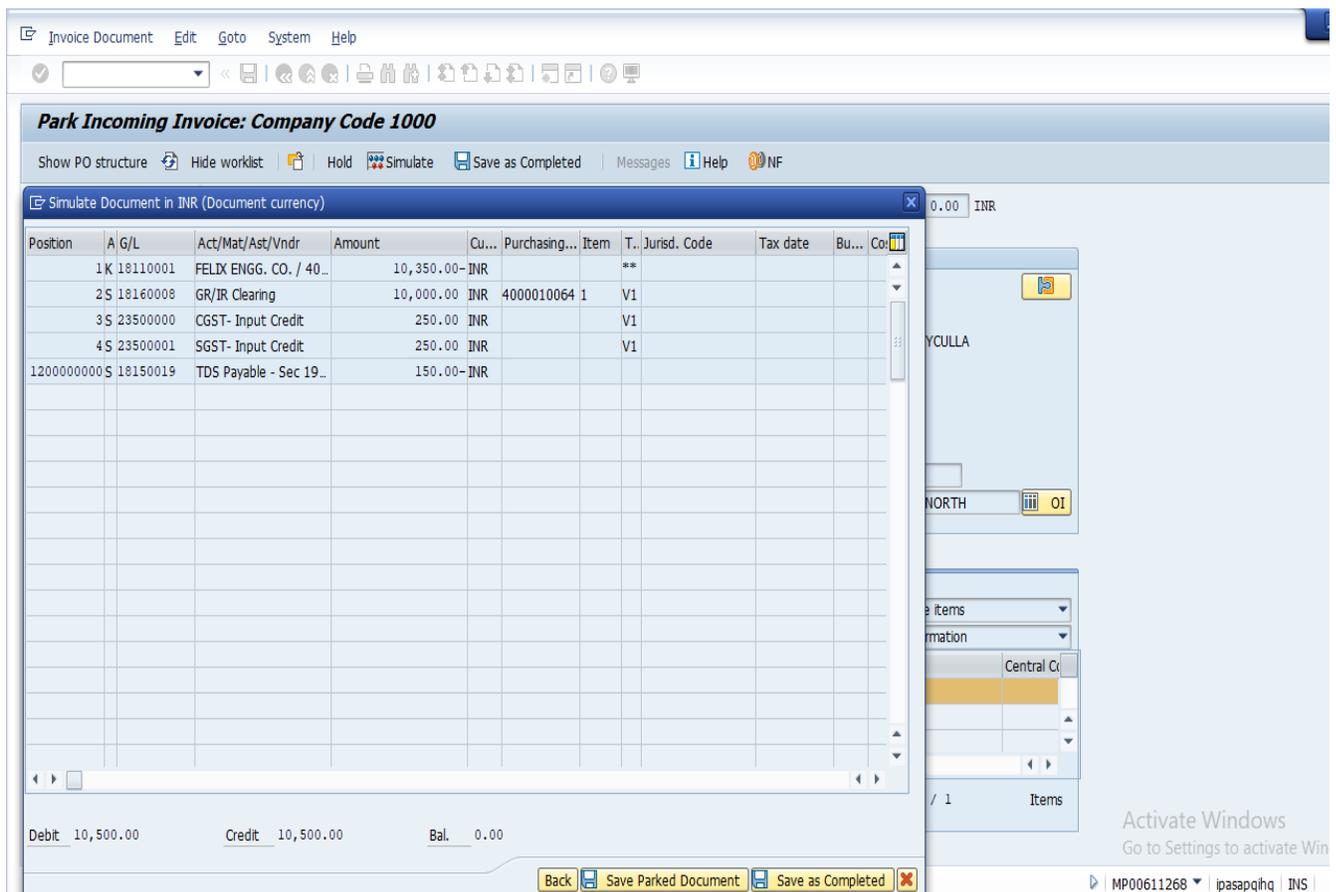
Item	Amount	Quantity	O...	Purchase ...	Item	PO Text	Central C
	40.00			<input checked="" type="checkbox"/> 4202000040	10	Preventive Maintenance Tug Singaravelar	



## SAP User Manual for Preventive Maintenance

System will display FI Documents posting details.

Click on “  Save as Completed “ Save as Complete Button.



The screenshot shows the SAP 'Simulate Document in INR' window for a 'Park Incoming Invoice'. The window title is 'Park Incoming Invoice: Company Code 1000'. The main area contains a table with the following data:

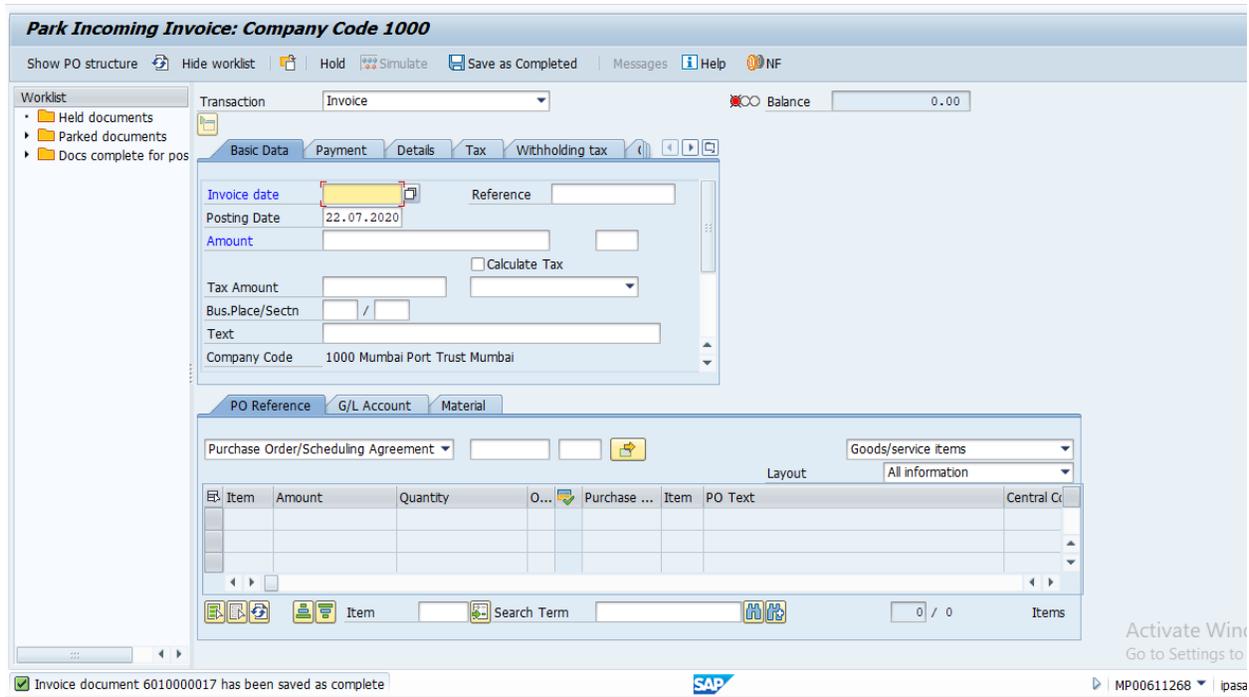
Position	A/G/L	Act/Mat/Ast/Vndr	Amount	Cu...	Purchasing...	Item	T. Jurisd. Code	Tax date	Bu...	Co...
1K	18110001	FELIX ENGG. CO. / 40...	10,350.00	INR			**			
2S	18160008	GR/IR Clearing	10,000.00	INR	4000010064	1	V1			
3S	23500000	CGST- Input Credit	250.00	INR			V1			
4S	23500001	SGST- Input Credit	250.00	INR			V1			
1200000000S	18150019	TDS Payable - Sec 19...	150.00	INR						

At the bottom of the window, there is a summary bar showing: Debit 10,500.00, Credit 10,500.00, Bal. 0.00. A toolbar at the bottom right includes buttons for 'Back', 'Save Parked Document', and 'Save as Completed'.



## SAP User Manual for Preventive Maintenance

System will park the invoice and displays “” 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



## SAP User Manual for Preventive Maintenance

➤ Vendor Account Number.: 40000442

**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		Cross-CC Number	
Reference		Trading Partner			
Doc.Header Text	Preventive Maint				
Clearing Text	Preventive 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	Preventive Maint	Assignment	

**Open item selection**

Account	40000442
Account Type	K <input type="checkbox"/> Other Accounts
Special G/L Ind	<input 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

**Step 2.** Enter the **Document Number** and Click on **Process Open Items** to process the payment



## SAP User Manual for Preventive 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.    Standard OIs

#### Document Number

From	To	String	Initial Value
2600000032	<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 Preventive Maintenance

Document Edit Goto Extras Settings Environment System Help

**Post Outgoing Payments Correct G/L account item**

Choose open items Process Open Items More data

G/L Account 23110002 SBI Revenue Account - 10000085430 - Outgoing  
Company Code 1000 Mumbai Port Trust

Item 1 / Credit entry / 50

Amount 10,350.00 INR  
Calculate Tax

Business place  
Profit Ctrs

Value date 27.07.2020

Assignment  
Text Preventive Maint

More  
Long Texts

Payment Amount entered

**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 Preventive 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:     
 Doc.Header Text: Preventive Maint    Trading part.BA:   

Items in document currency

PK	BusA	Acct		INR	Amount	Tax amnt
001	50	0023110002	SBI - Rev - Outgain		10,350.00-	
002	25	0040000442	FELIX ENGG. CO.		10,350.00	

D 10,350.00    C 10,350.00    0.00    \* 2 Line Items

Step 6. Click on save The Vendor Payment document- 2300000023 is Posted successfully

Document 2300000027 was posted in company code 1000



## SAP User Manual for Preventive Maintenance

**Step 7. Go to Transaction FB03 or Document Tab - Display → To Display the Payment document Posted**

**Display Document: Data Entry View**

Display Currency    General Ledger View

Data Entry View

Document Number	2300000027	Company Code	1000	Fiscal Year	2020
Document Date	27.07.2020	Posting Date	27.07.2020	Period	4
Reference		Cross-Comp.No.			
Currency	INR	Texts Exist	<input type="checkbox"/>	Ledger Group	

CoCd    Item    Key S...    Account    Description    Amount    Curr.    Tx    Cost Center

1000	1	50	23110002	SBI - Rev - Outgoing	10,350.00-	INR		
	2	25	40000442	FELIX ENGG. CO.	10,350.00	INR		

**Step 8. Go to Document Tab – Select Print Preview for Document Overview**

**Document Overview - Display**

Choose    Save    Tax data

Doc.Type : KZ ( Vendor Payment ) Normal document

Doc. Number	2300000027	Company Code	1000	Fiscal Year	2020
Doc. Date	27.07.2020	Posting Date	27.07.2020	Period	04
Calculate Tax	<input type="checkbox"/>				
Doc. Currency	INR				
Doc. Hdr Text	Preventive Maint				

Itm	PK	Account	Account Short Text	Assignment	Tx	Amount
1	50	23110002	SBI - Rev - Outgoing	20200727		10,350.00-
2	25	40000442	FELIX ENGG. CO.			10,350.00

**Step 9: Transaction FBZ5 → Go to Transaction FBZ5 for Printing the Check**





## SAP User Manual for Preventive 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.	
Ten thousand three hundred fifty only	
	10,350.00

**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 Preventive 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 Preventive 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.

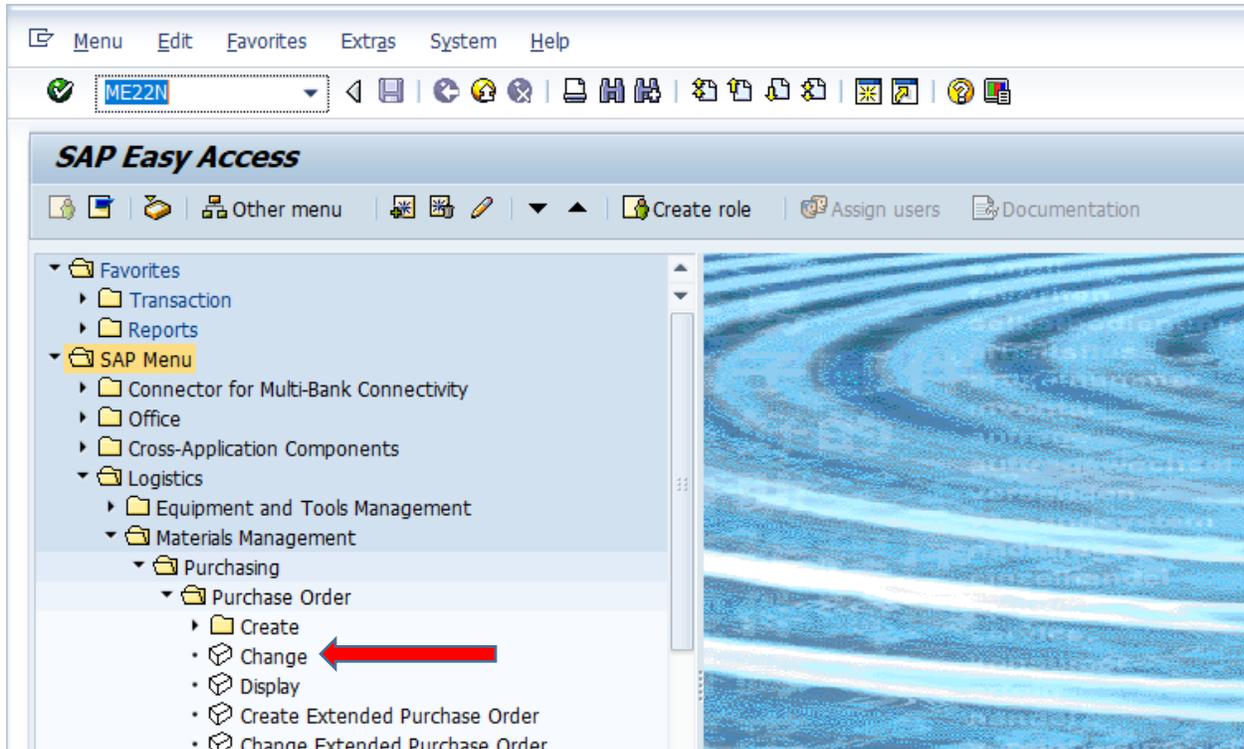
Row#	Party	Account No	IFSC	Amount	Remarks
1	ALEX CHEMICAL & INDUSTRIES	307651100000204	IBKL0000307	2,587.00	2300000024
2	MAHARASHTRA BAMBOO BHANDAR			25,200.00	2300000025
3	FELIX ENGG. CO.	7234896734	SBIN0000290	58,995.00	2300000026
4	FELIX ENGG. CO.	7234896734	SBIN0000290	10,350.00	2300000027
Total Amount:				97,132.00	

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 Preventive Maintenance



Click on Other document and Enter Pur. Order: 4202000040.

Click on Other Document Button.



## SAP User Manual for Preventive Maintenance

The screenshot displays the SAP Purchase Order interface for document 4000010064. The header shows the vendor as 40000442 FELIX ENGG. CO. and the document date as 20.07.2020. The item is 'Preventive Maint by External Vendor'. Below the item header, there are tabs for 'Quantities/Weights', 'Delivery Schedule', 'Delivery', 'Invoice', 'Conditions', 'India', 'Account Assignment', 'Purchase Order History', 'Texts', and 'Delivery Address'. The 'Invoice' tab is active, showing a table of transactions with a red arrow pointing to the 'Tr./Ev. Parked invoice' entry.

Sh. Text	MVT	Material	Document	Item	Posting Date	Quantity	Delivery cost quantity	OU	Amount	Loc. Cur.	L. cur	Qty in OPUn	DelCostQty (OPUn)	Order Price Unit	Amount
WE	101	5101000050			1 22.07.2020				10,000.00	INR					10,000.00
<b>Tr./Ev. Goods receipt</b>															
Lerf		1000000237			22.07.2020				10,000.00	INR					10,000.00
<b>Tr./Ev. Service entry</b>															
VRe		6010000017			1 22.07.2020				10,000.00	INR					10,000.00
<b>Tr./Ev. Parked invoice</b>															

## SAP User Manual for Preventive Maintenance

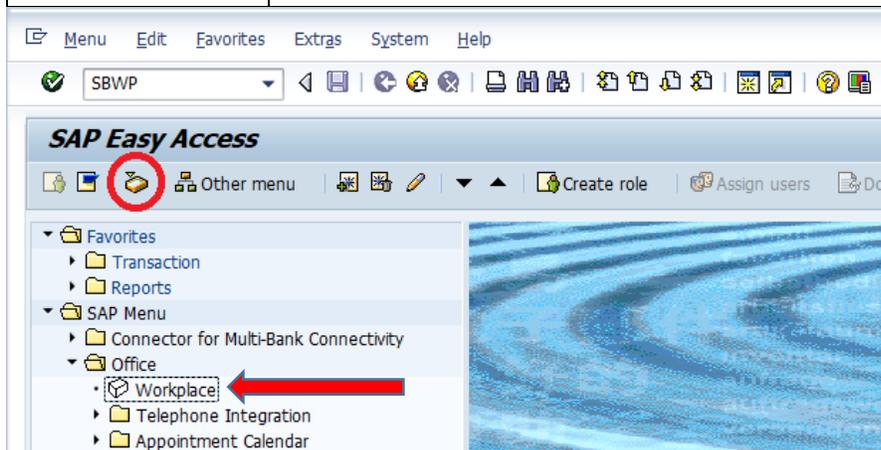
### Parked Invoice Approval:

Login as Approver 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 Preventive Maintenance

Expand “Inbox” button, under workflow “Complete parked invoice 6010000018 2020” message will appear.

Double Click on the “Complete parked invoice 6010000018 2020 ”message.

The screenshot shows the SAP Business Workplace interface for user MP00611268. The left sidebar displays a folder tree with 'Inbox' 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
1	Please approve the Parked Invoice 6010000018, Year 2020	✓	415475	22.07.2020	13:08:05	5				
2	Please approve the Purchase Order 4000010064	✓	414818	22.07.2020	11:52:04	5				
3	Please approve the Purchase Requisition 2001000963	✓	415320	20.07.2020	02:34:58	5				
4	Please approve the Purchase Requisition 2001000963	✓	414579	20.07.2020	02:33:46	5				
5	Please approve the Purchase Requisition 2001000962	✓	414487	19.07.2020	15:13:42	5				
6	Please approve the Purchase Requisition 2001000962	✓	414486	19.07.2020	15:13:02	5				
7	Please approve the Purchase Requisition 2001000961	✓	415262	19.07.2020	15:10:39	5				
8	Please approve the Purchase Requisition 2001000961	✓	415261	19.07.2020	15:10:16	5				
9	Please approve the Purchase Requisition 2001000959	✓	415260	19.07.2020	15:10:03	5				
10	Please approve the Purchase Requisition 2001000959	✓	414485	19.07.2020	15:07:07	5				
11	Please approve the Purchase Requisition 2001000959	✓	414484	19.07.2020	15:06:38	5				
12	Please approve the Purchase Requisition 2001000959	✓	415258	19.07.2020	15:05:51	5				
13	Please approve the Purchase Requisition 2001000959	✓	415259	19.07.2020	15:05:51	5				

Below the table, a detailed view of the selected message is shown:

**Workflow 28**

**Please approve the Parked Invoice 6010000018, Year 2020**

**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**  
Go to Settings to activate Windows



## SAP User Manual for Preventive Maintenance

It will open the Decision Step in Workflow Screen.

Click on Approve Button.

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 Parked Invoice 6010000018, Year 2020'. Below this, a section titled 'Choose one of the following alternatives' lists five options: 'Approve', 'Reject', 'Display', 'Approval or Rejection History', and 'Hold'. At the bottom, there are two columns: 'Description' and 'Objects and attachments'. The 'Description' column contains instructions on how to use the decision options and what happens if 'Cancel' is chosen. The 'Objects and attachments' column states 'No attachments or objects exist'.



## SAP User Manual for Preventive Maintenance

Invoice Document will be approved and Posted for Vendor Payment.

The screenshot shows the SAP Business Workplace interface for user MP00611268. The left sidebar displays the folder structure, including 'Inbox' with 'Unread Documents 11' selected. The main area shows a list of 11 unread documents:

Me...	Ty...	Title	At...	Author	Date recel...	Co...	Re...	Recp...
✉		Parked Invoice 6010000018, Year 2020 is Posted.		SAP_WFRT	22.07.2020			1
✉		Parked Invoice 6010000018, Year 2020 is Posted.		SAP_WFRT	22.07.2020			1
✉		Parked Invoice 6010000018, Year 2020 is Posted.		SAP_WFRT	22.07.2020			1
✉		Parked Invoice 6010000018, Year 2020 is Posted.		SAP_WFRT	22.07.2020			1
✉		JMS 1100000010 is approved.		SAP_WFRT	22.07.2020			1
✉		JMS 1100000010 is approved.		SAP_WFRT	22.07.2020			1
✉		JMS 1100000010 is approved.		SAP_WFRT	22.07.2020			1
✉		Purchase Order 4000010064 is approved.		SAP_WFRT	22.07.2020			1
✉		Purchase Order 4000010064 is approved.		SAP_WFRT	22.07.2020			1
✉		Purchase Order 4000010064 is approved.		SAP_WFRT	22.07.2020			1
✉		Purchase Order 4000010064 is approved.		SAP_WFRT	22.07.2020			1

The detailed view of the selected document shows:

**Parked Invoice 6010000018, Year 2020 is Posted.**

Hello Sir/Madam,

Parked Invoice 6010000018, Year 2020 is Posted Successfully.

Regards,

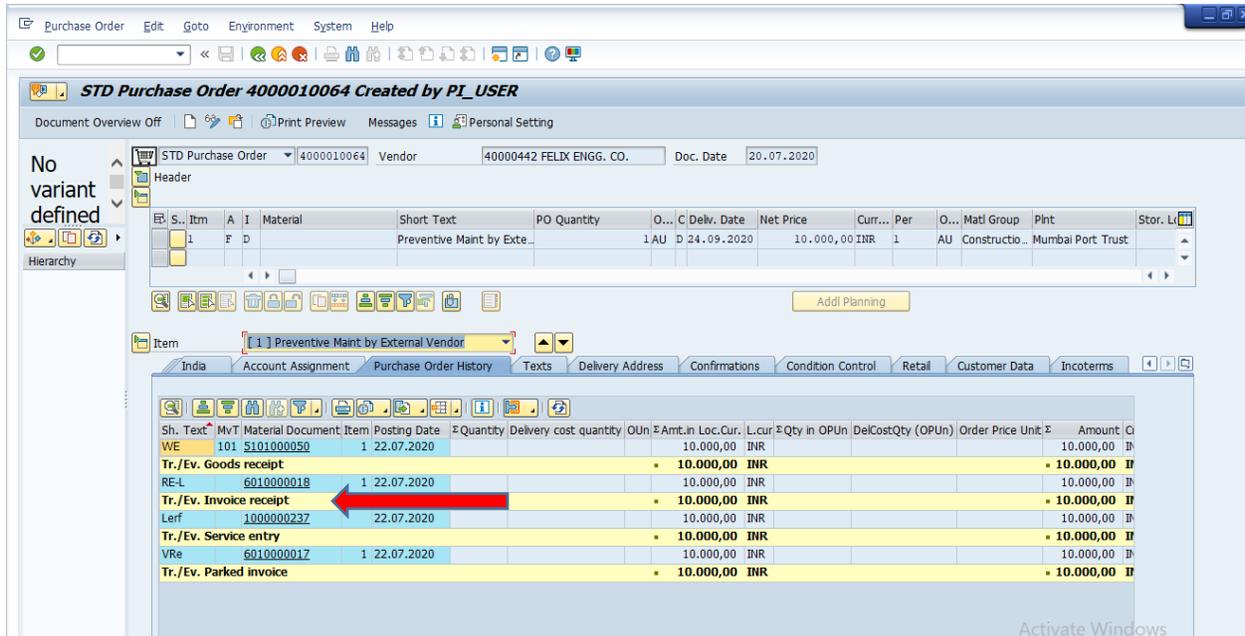
Go to Transaction Me23N

And Other Purchase Order enter the PO Number"4000010064"

And Select Purchase Order history in Item header

"Invoice Receipt" Updated in Purchase Order History

## SAP User Manual for Preventive Maintenance



### FI Process-Vendor Outgoing Payment

Enter Transaction Code F-53

In the below selection screen enter the following fields to process the payment for the Vendor

- Enter Document Date: 23-07-2020
- Bank Account Details (Rev Outgoing A/c): 23110002
- Vendor Account Number.: 40000442

Document Date or Entry Date



## SAP User Manual for Preventive Maintenance

Process Open Items

Document Date	23.07.2020	Type	KZ	Company Code	
Posting Date	23.07.2020	Period	4	Currency/Rate	
Document Number				Translation d	
Reference				Cross-Reference Number	
Doc.Header Text	Payment for Maint Order			Trading part.BA	
Clearing Text					

Bank data

Account	23110002	Business Area	
Amount	1		
Amt.in loc.cur.			
Bank Charges		Bank Charges	
Value date	23.07.2020	Profit Center	
Text		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

Enter the **Document Number** and Click on **Process Open Items** to process the payment



## SAP User Manual for Preventive 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
<b>2600000032</b>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enter the Payment Amount to Post the Payment for the Invoice document



# SAP User Manual for Preventive 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 ...	D..	Document ...	P..	Bus...	Da...	INR Gross	CashDiscount	CDPer.
2600000032	RE	22.07.2020	31		1	10,350.00-		

Processing Status

Number of Items	1	Amount Entered	1.00-
Display from Item	1	Assigned	10,350.00-
Reason Code		Difference Postings	
Display in clearing currency		Not Assigned	10,349.00

1 items were selected



## SAP User Manual for Preventive Maintenance

**Post Outgoing Payments Correct G/L account item**

Choose open items    Process Open Items    More data    Account Model

G/L Account: 23110002 SBI Revenue Account - 10996685430 - Outgoing  
Company Code: 1000 Mumbai Port Trust

Item 1 / Credit entry / 50

Amount: 15,970.50    INR  
Calculate Tax

Business place:   
Profit Ctrs: 1005

Value date: 23.07.2020    More

Assignment:   
Text: P2P Process    Long Texts

Next Line Item

PstKy:     Account:     SGL Ind:     New Co.Code:

Payment Amount entered





## SAP User Manual for Preventive Maintenance

The Vendor Payment document- 2300000022 is Posted successfully

Document 2300000022 was posted in company code 1000

Go to **Transaction FB03** or **Document Tab - Display** → To Display the Payment document Posted

Display Document: Data Entry View

Display Currency    General Ledger View

Document Number	2300000022	Company Code	1000	Fiscal Year	2020
Document Date	23.07.2020	Posting Date	23.07.2020	Period	4
Reference		Cross-Comp.No.			
Currency	INR	Texts Exist	<input type="checkbox"/>	Ledger Group	

Co...	Itm	PK	S	Account	Description	Amount	Curr.	Tx	Cost Center	Profit Center
1000	1	50		23110002	SBI - Rev - Outgoing	15,970.50-	INR			1005
	2	25		40000899	CONA INDUSTRIES	15,970.50	INR			

Go to **Document Tab** – Select **Print Preview** for Document Overview

Document Overview - Display

Choose    Save    Tax data

Doc.Type	KZ ( Vendor Payment ) Normal document				
Doc. Number	2300000022	Company Code	1000	Fiscal Year	2020
Doc. Date	23.07.2020	Posting Date	23.07.2020	Period	04
Calculate Tax	<input type="checkbox"/>				
Doc. Currency	INR				
Doc. Hdr Text	P2P Outgoing Payment				

Itm	PK	Account	Account Short Text	Assignment	Tx	Amount
1	50	23110002	SBI - Rev - Outgoing	20200723		15,970.50-
2	25	40000899	CONA INDUSTRIES			15,970.50



## SAP User Manual for Preventive Maintenance

### Cheque Print

Go to Transaction **FBZ5** → Go to Transaction **FBZ5** for Printing the Cheque

Document Number	2300000022	
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
Payt Advice Printer	
<input type="checkbox"/>	Print Immediately
<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

Cheque Printed Successfully



# SAP User Manual for Preventive Maintenance

**SAP**

Print:

Output Device:  Local Printer

Page selection:

Spool Request

Name: SMART AN00685606

Title:

Authorization:

Spool Control

Print Now

Delete After Output

New Spool Request

Close Spool Request

Spool Retention: 8 Day(s)

Storage Mode: Print only

Number of Copies

Number:

Group (1-1-1,2-2-2,3-3-3,...)

Cover Page Settings

SAP cover page: Do not print

Recipient:

Department:

Print preview Print

Navigation icons: back, forward, search, etc.

Print Preview of ZLP01 Page 00001 of 00001

Archive Print and Archive

A/C Payee 2 3 0 7 2 0 2 0

CONA INDUSTRIES

Fifteen thousand nine hundred seventy and fifty paise only

15,970.50



## SAP User Manual for Preventive Maintenance

### Payment File

Go to Transaction ZFI04 → Go to Transaction ZFI04 – Enter **Company code**, **Current Date** and **Print** to create the Bank file for Vendor payment

**Text file to bank - Vendor Payment**

Company code: 1000

Current Date: 23.07.2020 to

Print layout

Bank file created successfully:

**Print Preview of ZLP01 Page 00001 of 00001**

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	CONAINDUSTRIES			15,970.50	2300000022
Total Amount:				15,970.50	



## SAP User Manual for Preventive Maintenance

### Technical Completion of Order

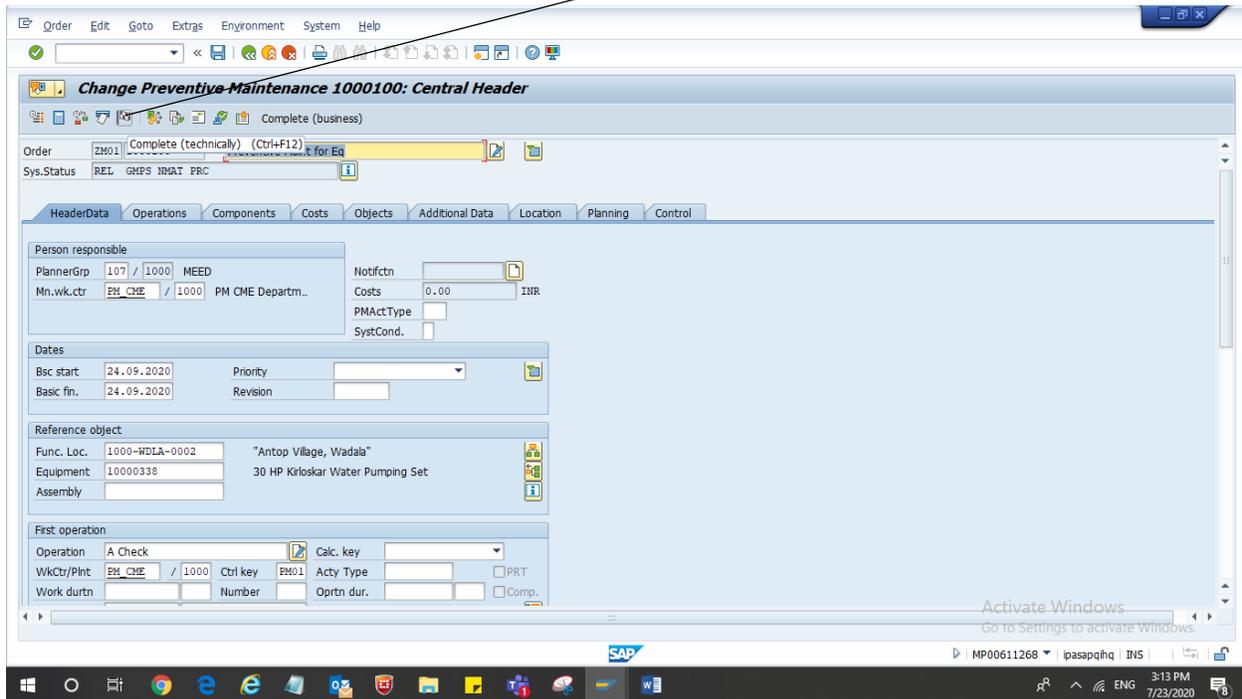
Go to Transaction Code IW32 and enter the preventive Maintenance order No

The screenshot shows the SAP 'Change Order: Initial Screen' interface. At the top, there is a navigation bar with tabs for 'Header data', 'Operations', 'Components', 'Costs', 'Additional data', and 'Plan'. Below this, the 'Order' field is highlighted with a red box, containing the value '1000100'. To the right of the text input is a yellow button with a copy icon.



## SAP User Manual for Preventive Maintenance

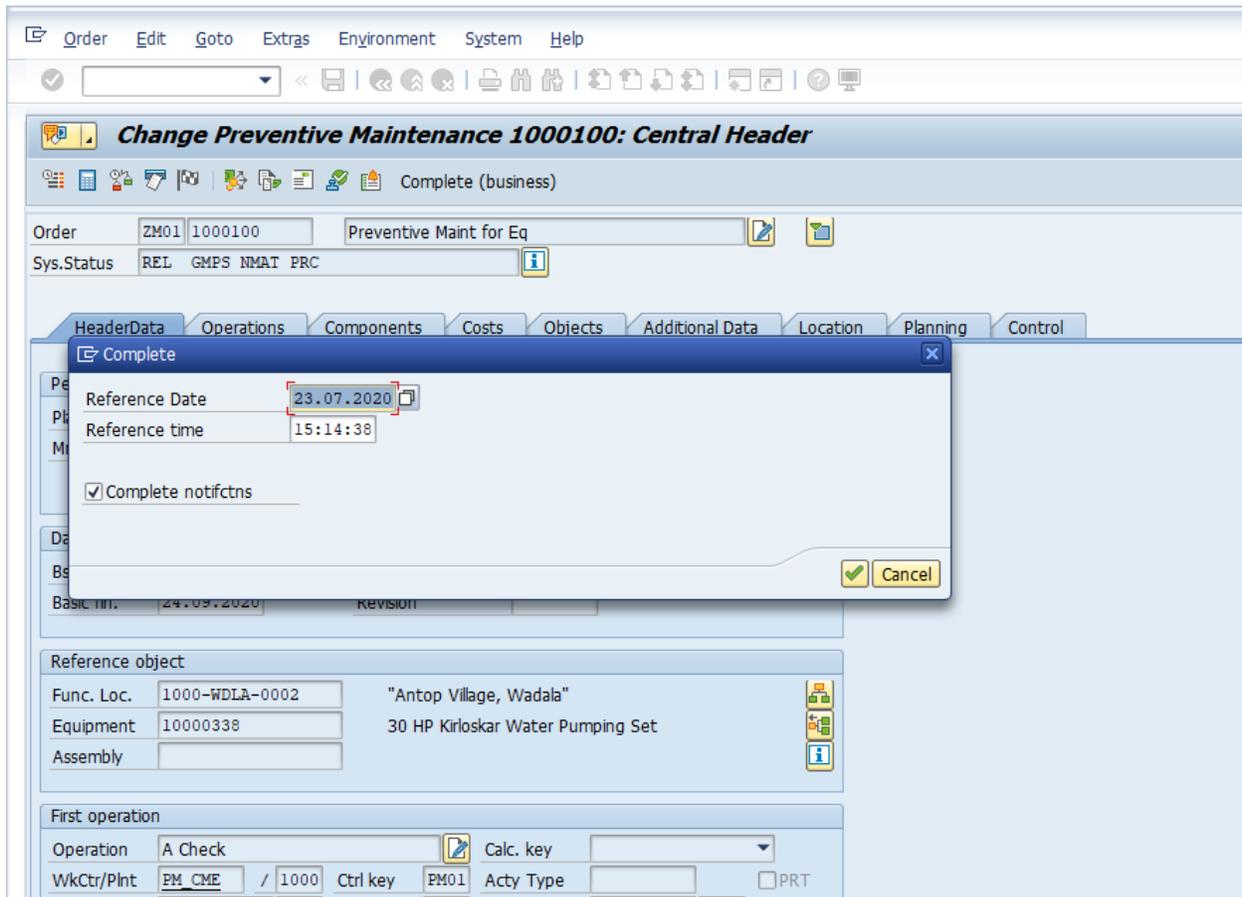
And Click Complete Technically icon as shown





## SAP User Manual for Preventive Maintenance

Enter the Technical Closure date and time for the Order



The screenshot shows the SAP 'Change Preventive Maintenance 1000100: Central Header' dialog box. The 'Complete' tab is active, and a sub-dialog box titled 'Complete' is open. In this sub-dialog, the 'Reference Date' field is set to '23.07.2020' and the 'Reference time' field is set to '15:14:38'. The 'Complete notifctns' checkbox is checked. The background dialog shows the order details: Order ZM01 1000100, System Status REL GMPS NMAT PRC, and Reference object 'Antop Village, Wadala' with equipment '30 HP Kirloskar Water Pumping Set'. The 'First operation' is 'A Check' with Calc. key and Ctrl key fields.



## SAP User Manual for Preventive Maintenance

Order Saved as Technically Completed and updated in status TECO

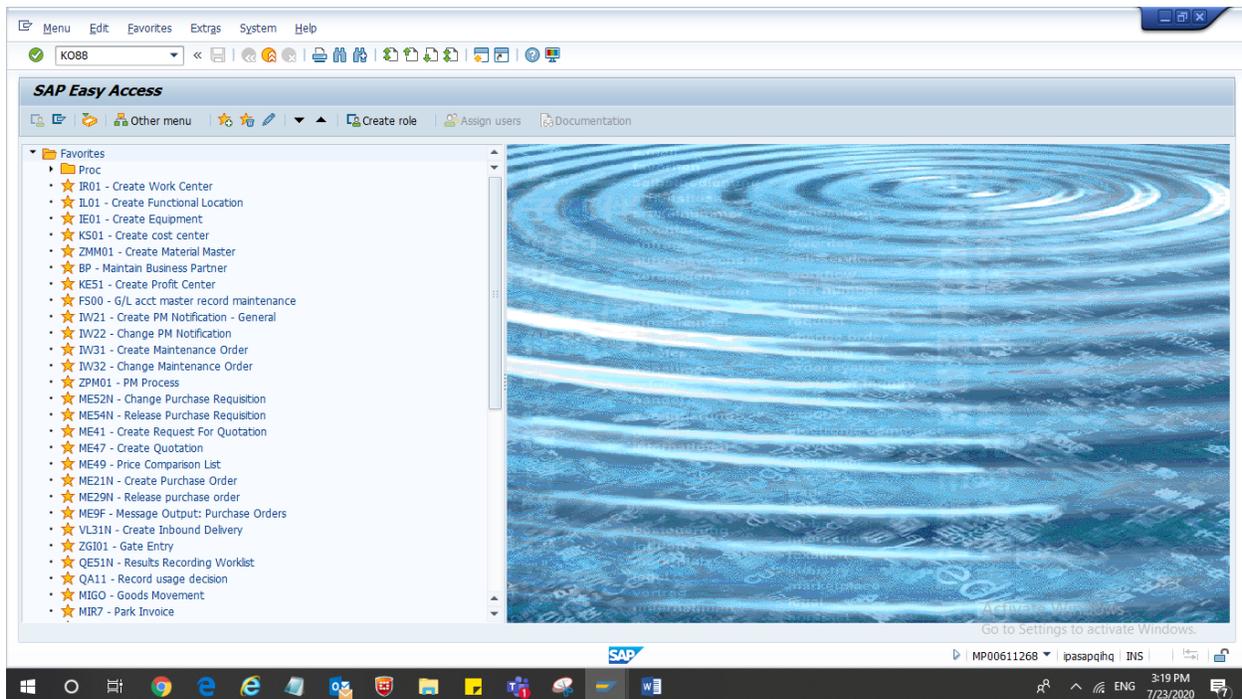
The screenshot displays the SAP 'Change Preventive Maintenance 1000100: Central Header' interface. The system status is 'TECO'. The order number is 'ZM01' and the equipment is '100100'. The system status is 'TECO GMPS JBFI NMAT PRC SETC'. The interface includes tabs for HeaderData, Operations, Components, Costs, Objects, Additional Data, Location, Planning, and Control. The 'Person responsible' section shows PlannerGrp '107 / 1000 MEED' and Mn.wk.ctr 'PM\_CME / 1000 PM CME Departm...'. The 'Dates' section shows Bsc start '24.09.2020' and Basic fin. '24.09.2020'. The 'Reference object' section shows Func. Loc. '1000-WDLA-0002' and Equipment '10000338'. The 'First operation' section shows Operation 'A Check' and Calc. key 'PM01'. An arrow points from the text above to the menu bar.



## SAP User Manual for Preventive Maintenance

### Settlement of Order

Enter T code KO88 for Settlement to Cost Center





## SAP User Manual for Preventive Maintenance

Enter the Controlling Area 1000

The screenshot shows a SAP 'Set Controlling Area' dialog box. The 'Controlling Area' field is highlighted with a red box and contains the value '1000'. Below the dialog box, there are several input fields and checkboxes for configuration options:

Parameters			
tlement Period	<input checked="" type="checkbox"/>	Posting period	<input type="checkbox"/>
al Year	<input checked="" type="checkbox"/>	Asset Value Date	<input type="text"/>
lger Group	<input type="text"/>		
cessing Type	<input checked="" type="checkbox"/> <input type="text"/>		
cessing Options			
ackground Processing			
Test Run			
etail List	<input type="text"/>		
heck Trans. Data			



## SAP User Manual for Preventive Maintenance

Enter Settlement Period 04 and Fiscal Year 2020 and remove test run Tick box, Click on Execute Button.

**Actual Settlement: Order**

 Settlement Rule

Controlling Area 1000  
Order 1000100 

**Parameters**

Settlement Period	4	Posting period	
Fiscal Year	2020	Asset Value Date	
Processing Type	1 Automatic		

**Processing Options**

Test Run  
 Check Trans. Data



## SAP User Manual for Preventive Maintenance

**Actual Settlement: Order Basic list**

**Selection**

Selection Parameters	Value	Name
<b>Order</b>	1000100	Preventive Maint for Eq
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
<b>Execution Type</b>	Settlement Executed
Processing Mode	Test run

Processing completed with no errors

**Statistics**

Processing Category	Σ	Number
<b>Settlement Executed</b>		1
No Change		
Not Relevant		
Inappropriate Status		
Error		

Click on highlighted option called Detail List.

**Actual Settlement: Order Detail list**

Basic list    Sender  Receiver  Settlement rule       Save  Select

**Detail list - Settled values**

Senders	Short text: Sender	Receiver	Σ ValCOArCur	Inform.
<b>ORD 1000100</b>	Preventive Maint for Eq	CTR 10050401	10,000.00	
			<b>= 10,000.00</b>	

Order settled to Cost Center



## SAP User Manual for Preventive Maintenance

### Closure of Order

Enter Transaction IW32

**Change Order: Initial Screen**

Header data   Operations   Components   Costs   Additional data   Planning   Control   

Order  

Press Enter, click on Complete Business or (ctrl+shift+12)



## SAP User Manual for Preventive Maintenance

**Change Preventive Maintenance 1000100: Central Header**

Complete (business)

Order   Preventive Maint for Eq

Sys.Status  ⓘ

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

**Person responsible**

PlannerGrp	<input type="text" value="107 / 1000"/> MEED	Notifctn	<input type="text"/>
Mn.wk.ctr	<input type="text" value="PM CME"/> / <input type="text" value="1000"/> PM CME Department	Costs	<input type="text" value="0.00"/> INR
		PMActType	<input type="text"/>
		SystCond.	<input type="text"/>

**Dates**

Bsc start	<input type="text" value="24.09.2020"/>	Priority	<input type="text"/>
Basic fin.	<input type="text" value="24.09.2020"/>	Revision	<input type="text"/>

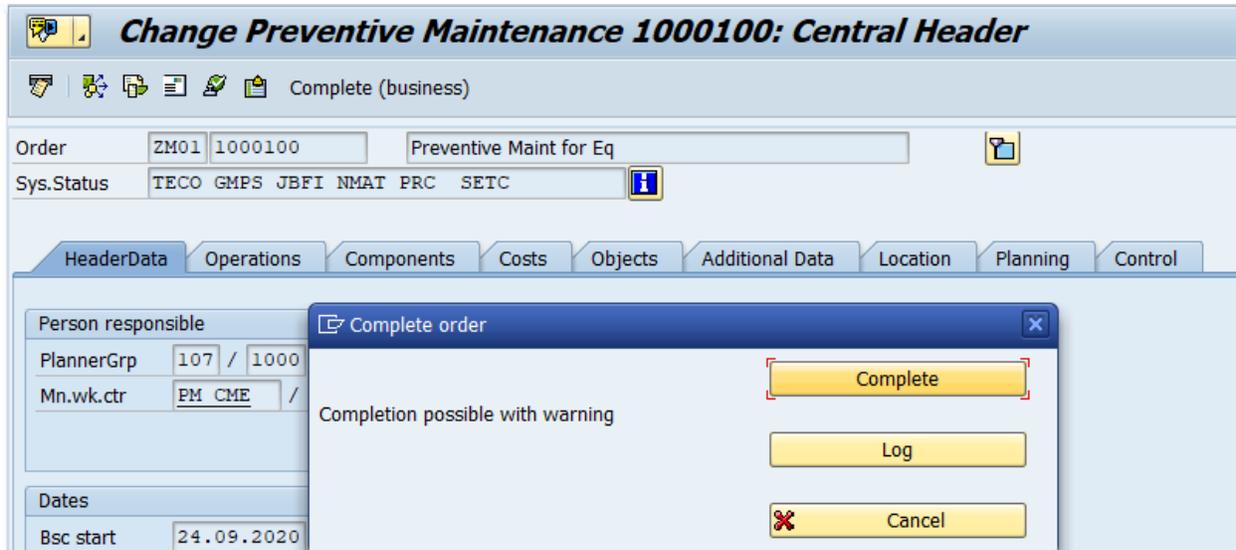
**Reference object**

Func. Loc.	<input type="text" value="1000-WDLA-0002"/>	"Antop Village, Wadala"
Equipment	<input type="text" value="10000338"/>	30 HP Kirloskar Water Pumping Set
Assembly	<input type="text"/>	

**First operation**

Operation	<input type="text" value="A Check"/>	Calc. key	<input type="text"/>
-----------	--------------------------------------	-----------	----------------------

## SAP User Manual for Preventive Maintenance



**Change Preventive Maintenance 1000100: Central Header**

Complete (business)

Order: ZM01 1000100 Preventive Maint for Eq

Sys.Status: TECO GMPS JBFI NMAT PRC SETC

Person responsible

PlannerGrp: 107 / 1000

Mn.wk.ctr: PM CME /

Dates

Bsc start: 24.09.2020

**Complete order**

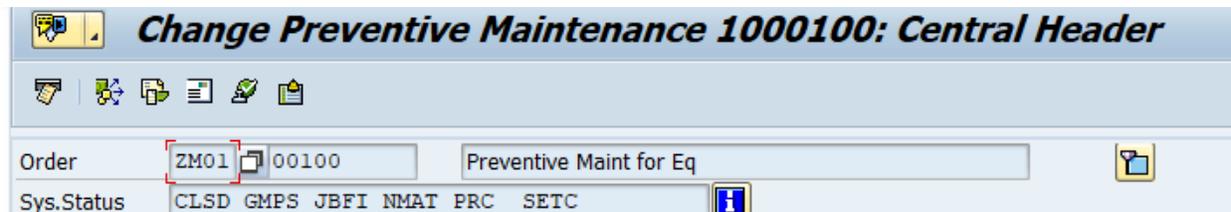
Completion possible with warning

Complete

Log

Cancel

Click on complete, Status will be updated CLSD after execute it.



**Change Preventive Maintenance 1000100: Central Header**

Order: ZM01 00100 Preventive Maint for Eq

Sys.Status: CLSD GMPS JBFI NMAT PRC SETC

Order Closed for further posting.