OVER VIEW OF
SAP PM Configuration
Pack

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Hello Everyone,

A Ware Welcome To You All! We are really excited to offer the complete SAP PM configuration pack to the SAP community. There were lot of consultants who were after us to come up with pack and so we are glad to present this to you... As you are aware that our SAP FICO, PP/QM, MM/WM and SD have already achieved the best selling status and have received lots of accolades and really helped the consultants take their SAP knowledge and career to the next level ...I am very confident that PM configuration package will go a step forward and do much more than that.........

For those who have been on our list and who have bought from us earlier you all know that we have over-delivered on each of our configuration packs and we want to do the same thing with SAP PM config pack too... For those who have visited our site for the first time I would like to welcome you to our site and promise you that we would do our best to ensure that your life at the clients place would be very comfortable...

What I have done here is given you a brief of around 98+ pages of content in PM pack so that you can have a feel of what it would be like in terms of structure. The whole pack is extremely voluminous, step by step guide this is just a feeler... So I hope you enjoy this.... So lets dive in....
1. PM Technical Object Configuration

1.1 Define Planning Plant

**BACKGROUND**

This configuration setting enables to define the planning plant.

Planning plant is the one where the planning of entire maintenance activities is performed for several plants.

**SCENARIO**

Define IND6 as planning plant.

**INSTRUCTION**

Follow the Menu Path: IMG → Enterprise Structure → Definition → Plant Maintenance → Maintain maintenance planning plant

Click 🔄

Click 🔄 New Entries

Enter planning plant. E.g. IND6.

Note: - when creating plant by copying from another plant, all relevant information is copied.

Click 🔄
1.2 Assign Planning Plant

**BACKGROUND**

This configuration setting enables to assign the planning plant.

Assignment is establishing relation between planning plant and maintenance plant.

**SCENARIO**

Assign IND6 planning plant to IND6 maintenance plant.

**INSTRUCTION**

**Follow the Menu Path:** IMG ➔ Enterprise Structure ➔ Assignment ➔ Plant Maintenance ➔ Assign maintenance planning plant to maintenance plant

Click 📌

Enter the planning plant against the maintenance plant

![Image of Change View "Allocation of PlanPlants to MaintPlants": Overview]

Click 📌
1.3 Define Types of technical objects

**BACKGROUND**

This configuration setting enables to define the technical object types.

Each equipment and functional location can be assigned to technical object type. Technical object type is mainly used to group the equipment of similar usage.

Grouping of equipment helps better reporting.

**SCENARIO**

Define technical object type.

**INSTRUCTION**

Follow the Menu Path: IMG → Plant maintenance and customer service → Master data in Plant maintenance and customer service → Technical object → General Data → Define Types of Technical Objects

Click 📰
Click ⭐ to create new technical object type

Maintain fields as explained below

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Value and Description of field</th>
</tr>
</thead>
<tbody>
<tr>
<td>ObjectType</td>
<td>Key identifying the object type. E.g. 512 to indicate Generator group.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the object type. E.g. Diesel Generators.</td>
</tr>
</tbody>
</table>

Click [New Entries]
1.4 Define Plant Sections

BACKGROUND

This configuration setting enables to define the plant sections.

Plant section helps to subdivide the maintenance plant for production responsibility. Person responsible will coordinate between production and plant maintenance.

This can be used for evaluation purpose also.

SCENARIO

Define plant sections for IND6.

INSTRUCTION

Follow the Menu Path: IMG → Plant maintenance and customer service → Master data in Plant maintenance and customer service → Technical object → General Data → Define Plant Sections

Click 📦

Click New Entries

Maintain the field as explained below
Maintain fields as explained below

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Value and Description of field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plant</td>
<td>Key identifying plant. E.g. IND6</td>
</tr>
<tr>
<td>Plant section</td>
<td>Key identifying the plant section. E.g. 100</td>
</tr>
<tr>
<td>PersResponsible</td>
<td>Name of person responsible</td>
</tr>
<tr>
<td>Phone</td>
<td>Contact phone number</td>
</tr>
</tbody>
</table>

Click ![Icon](image1.png)

Click ![Icon](image2.png)
1.5 Create Structure indicator for Functional Location

BACKGROUND

This configuration setting enables to define the structure for functional location.

Structure of IND6 (FLS)

- Plant structure is broken into four parts:

<table>
<thead>
<tr>
<th>AAAA-HH-XXXX-XXXX</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 1:</td>
<td>Plant &amp; Processing Area</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Level 2:</td>
<td>Processing Lines / Facilities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Level 3:</td>
<td>Major Processes / Facilities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Level 4:</td>
<td>Sub-Processes / Facilities</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This structure helps to identify the functional location exactly.

SCENARIO

Create functional location structure for IND6 as above.

INSTRUCTIONS

Follow the Menu Path: IMG ➔ Plant maintenance and customer service ➔ Master data in Plant maintenance and customer service ➔ Technical object ➔ Functional Locations ➔ Create Structure indicator for Reference Locations/Functional Locations

Click 🎉
Click [New Entries] to create new entries.

Maintain fields as explained below

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Value and Description of field</th>
</tr>
</thead>
<tbody>
<tr>
<td>StrIndicator</td>
<td>Key identifying the structure indicator. E.g. IND6</td>
</tr>
<tr>
<td>Edit mask</td>
<td>Enter the way the functional locations is to be structure. E.g. AAAA-NN-XXXX-XXXX</td>
</tr>
<tr>
<td>HierLevels</td>
<td>Hierarchy level to indicate the number of hierarchies.</td>
</tr>
</tbody>
</table>

**- Edit mask field indicates the allowed type of character to be created during functional location creation.

Allowed letters and signs are given below for ready reference.

"A" only letters can be entered  
"N" only numbers can be entered  
"X" both numbers and letters can be entered  
"S" numbers, letters, and special characters can be entered

The following special characters are allowed:

& ( ) + , / ; < = >

The following signs can be used:

- Hyphen  
/ slash  
' ' blank  
. Period  
_ Underscore  
= equals sign  
+ Plus sign  
; Semicolon  
: Colon

**- Hierarchy level indicates the number of hierarchy. Each number must be entered at the end of first level as shown
above. Numbers from 0 to 9 can be used for this. Level 10 is represented by the figure 0, level 11 by the figure 1, and so on.

**New Entries: Details of Added Entries**

<table>
<thead>
<tr>
<th>StrIndicator</th>
<th>IND6</th>
</tr>
</thead>
<tbody>
<tr>
<td>StructIndText</td>
<td>Structure for IND6</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Structure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit mask</td>
</tr>
<tr>
<td>HierLevels</td>
</tr>
</tbody>
</table>

Click  

Click  

**Impact of this configuration in Master Data / Transaction**

When creating functional location structure, it will be created as per the structure setting maintained here.
Select the right structure indicator before creating functional location.
1.6 Define Category of Functional Location

**BACKGROUND**

This configuration setting enables to define the functional location category.

Functional Location category contains
- Status profile
- Partner determination procedure
- Default value for measuring point
- Field selection
- Permit change document
- Object info key

**SCENARIO**

Discuss functional location category.

**INSTRUCTIONS**

**Follow the Menu Path:** IMG→Plant maintenance and customer service→ Master data in Plant maintenance and customer service → Technical object → Functional Locations → Define category of Functional Locations

Click 🅰️

Click **New Entries** to create new entries.

Maintain fields as explained below

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Value and Description of field</th>
</tr>
</thead>
<tbody>
<tr>
<td>FunctLocCat.</td>
<td>Key identifying the functional</td>
</tr>
<tr>
<td>Description</td>
<td>Enter description of functional location category.</td>
</tr>
<tr>
<td>-------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>ChangeDocuments</td>
<td>Tick in this check box will document the change document in the master record.</td>
</tr>
<tr>
<td>CustObject</td>
<td>Tick in this check box will identify the functional location category as customer object.</td>
</tr>
<tr>
<td>Other data</td>
<td>Tick in this check box will provide other data screen when maintaining technical objects.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Status profile</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>PartnDet.Proc.</td>
<td>PM</td>
</tr>
<tr>
<td>Object info</td>
<td>PM</td>
</tr>
<tr>
<td>MeasPtCategory</td>
<td></td>
</tr>
<tr>
<td>View profile</td>
<td>SFL</td>
</tr>
</tbody>
</table>

**Impact of this configuration in Master Data / Transaction**

When creating functional location structure, functional location category defined here will be used.
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>FunctLocation</td>
<td>IND6-01-PTS01-MAC01</td>
</tr>
<tr>
<td>Edit mask</td>
<td>AAAAX-NN-XXXXX-XXXXX</td>
</tr>
<tr>
<td>HierLevels</td>
<td>1 2 3 4</td>
</tr>
<tr>
<td>Labeling system</td>
<td>A Standard labelling</td>
</tr>
<tr>
<td>StrIndicator</td>
<td>IND6 Structure for IND6</td>
</tr>
<tr>
<td>FunctLocCat.</td>
<td>M Technical system - standard</td>
</tr>
</tbody>
</table>
1.7 Define Field selection for functional Location

BACKGROUND

This configuration setting enables to define the functional location field selection.

Through this configuration setting it is possible to make a field mandatory, optional, hide or view only.

It is required to make certain field to make mandatory according to the business requirement.

SCENARIO

Make Manufacturer field as mandatory for functional location category M

INSTRUCTIONS

Follow the Menu Path: IMG ➔ Plant maintenance and customer service ➔ Master data in Plant maintenance and customer service ➔ Technical object ➔ Functional Locations ➔ Define field selection for Functional Locations

Click 📚
Double click on Field Selection for Functional Location (Common Fields for E).

Identify the manufacturer field as shown below.

**Field Selection: Modifiable Fields**

<table>
<thead>
<tr>
<th>Modifiable field</th>
<th>Field name</th>
<th>Input</th>
<th>Req.</th>
<th>Disp.</th>
<th>Hide</th>
<th>HiLi</th>
</tr>
</thead>
<tbody>
<tr>
<td>ManufactPartNo.</td>
<td>ITOB-MAPAR</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacturer</td>
<td>ITOB-HERST</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Model number</td>
<td>ITOB-TYPBZ</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planner group</td>
<td>ITOB-INGRP</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning plant</td>
<td>ITOB-WERK</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plant for WorkCenter</td>
<td>ITOBATR-WERGW</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plant section</td>
<td>ITOB-BEBER</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Room</td>
<td>ITOB-MSGRP</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sales Group</td>
<td>ITOB-VKGRP</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sales Office</td>
<td>ITOB-VKDBUR</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sales Organization</td>
<td>ITOB-VKORO</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Settlement order</td>
<td>ITOB-AUFRN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Double click on Manufacturer field

Click on **FunctLocCategory**

Click **New values ...**

Enter the functional location category as “M”

select **Req** radio button
Click **Continue** to create new entries.

### Field Selection: Modified Field

<table>
<thead>
<tr>
<th>Screen group</th>
<th>Data for technical objects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modifiable field</td>
<td>Manufacturer</td>
</tr>
</tbody>
</table>

#### Influencing fields

<table>
<thead>
<tr>
<th>Influencing field</th>
<th>Contents</th>
<th>Input</th>
<th>Req.</th>
<th>Disp.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity category</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EquipRefCateg.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equipment category</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FunctLocCategory</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>M</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PMTCB type</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technical obj. type</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click 📜
Impact of this configuration in Master Data / Transaction

When creating functional location with category M, manufacturer field become mandatory.
1.8 Assign user status to equipment category

BACKGROUND

This configuration setting enables to assign the user defined status to an equipment category.

User status can be used to assign specific status to a equipment and to control further business transaction.

SCENARIO

Discuss assigning user defined status to equipment category.

INSTRUCTIONS

Follow the Menu Path: IMG → Plant maintenance and customer service → Master data in Plant maintenance and customer service → Technical object → Equipment → Assign user status profile to Equipment category.

Click ⏰

Assign the user status profile against equipment category.
<table>
<thead>
<tr>
<th>Equipment category description</th>
<th>StatProf</th>
<th>Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Machines</td>
<td>1002</td>
<td>Service equipment</td>
</tr>
<tr>
<td>B Machines with Serial Number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C RFID Equipment with Serial Num</td>
<td>IT0600002</td>
<td>T Equipment Status</td>
</tr>
<tr>
<td>D DSD vehicle</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E Equipment/Assets</td>
<td>MINE</td>
<td>Mining Equipment</td>
</tr>
<tr>
<td>F Medical Devices</td>
<td></td>
<td></td>
</tr>
<tr>
<td>G T-Equipments</td>
<td>IT0600002</td>
<td>T Equipment Status</td>
</tr>
<tr>
<td>H Machines</td>
<td>1006</td>
<td>Equipment</td>
</tr>
<tr>
<td>I Mining Equipment</td>
<td>MINE</td>
<td>Mining Equipment</td>
</tr>
<tr>
<td>J Production resources/tools</td>
<td>1006</td>
<td>Equipment</td>
</tr>
<tr>
<td>K Test/measurement equipment</td>
<td>1006</td>
<td>Equipment</td>
</tr>
<tr>
<td>L Customer equipment</td>
<td>1002</td>
<td>Service equipment</td>
</tr>
<tr>
<td>M TTC Rolling Stock</td>
<td></td>
<td></td>
</tr>
<tr>
<td>N Equipment as Tools</td>
<td>ZPRT</td>
<td>Profile for tools</td>
</tr>
<tr>
<td>O MES Equipment</td>
<td>ZMES01</td>
<td>Equipment</td>
</tr>
<tr>
<td>P ND6 Machines</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q PMSTAT</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click 📃

Click 🌴
1.9 Define Measuring point categories

**BACKGROUND**

This configuration setting enables to define the measuring point categories.

Measuring point categories are mandatory requirement for measuring point.

It defines the following:

- ✔ Measurement item uniqueness
- ✔ Use of catalog type to enter readings
- ✔ System response control when reading exceeds the range
- ✔ Tolerance time allowed for entering the reading in future

**SCENARIO**

Discuss measuring point category setting.

**INSTRUCTIONS**

**Follow the Menu Path:** IMG→Plant maintenance and customer service→Master Data in Plant maintenance and customer service→Basic settings→Measuring point, counters and measurement document→Define Measuring Point categories

Click 😎

Click New Entries

Maintain fields as explained below
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Value and Description of field</th>
</tr>
</thead>
<tbody>
<tr>
<td>MeasPtCategory</td>
<td>Key identifying the measuring point category. E.g. G</td>
</tr>
<tr>
<td>Description</td>
<td>Description of measuring point category. E.g. IND6 measuring point category</td>
</tr>
<tr>
<td>MeasPosUniqness</td>
<td>Uniqueness of the measurement position of this measuring point category. This measurement category may be used in many places, if the measurement position is required to be unique, it can be achieved through this setting. Select 1 from available entries</td>
</tr>
<tr>
<td>Catalog type</td>
<td>Allowed catalog type for entering values. E.g. C. Select from available entry.</td>
</tr>
<tr>
<td>MeasRge message</td>
<td>Type of message when the measurement reading is out of range. E.g. W for warning message.</td>
</tr>
<tr>
<td>TolPeriod (sec)</td>
<td>Tolerance period in seconds to record the measurement reading. It is difficult to enter the reading exactly at the exact SAP time i.e. measuring point. E.g. 300 to indicate five minutes.</td>
</tr>
</tbody>
</table>
Impact of this configuration in Master Data / Transaction

When creating a measuring point inside the technical object, measurement category must be maintained.

![Maintain Measuring Points: Overview](image)

<table>
<thead>
<tr>
<th>Equipment</th>
<th>PP-PUMP02</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Pump 150-200 GPM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MeasPoint</th>
<th>Measurement position</th>
<th>Cat</th>
<th>Char. Name</th>
<th>CodeGrp</th>
<th>V</th>
<th>Counter</th>
</tr>
</thead>
<tbody>
<tr>
<td>11461</td>
<td>2</td>
<td>6</td>
<td>C200</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
2. Master Data Configuration

2.1 Define BOM Status

**BACKGROUND**

This configuration setting enables to define BOM status.

BOM status is used to define whether the BOM can be used by any application area or not.

Example: -

- In the costing areas in a company, the BOM is exploded according to the application. While defining the BOM status, usage in costing area will be defined.

- In MRP, the following indicators are checked directly from the definition of the BOM status:
  - Explosion in MRP
  - Released for orders

MRP only reads BOMs whose BOM status has at least one of these indicators.

BOM status defines whether the BOM is active or inactive.

**SCENARIO**

BOM need to be created for certain for product whose BOM can be finalized only after some trial and error.

While it is in preparation it is required not to be used by any application. Status “In preparation” has to be created.
INSTRUCTIONS

Follow the Menu Path: IMG→Plant Maintenance and customer services→Master data in plant maintenance and customer service→Bills of materials→Control data for Bills of Material→Define BOM status

1. Click

.....continuation of the above screen’s right side balance portion

2. Click

3. Enter usage value. E.g. 6.

4. Leave all the check box as EMPTY.
5. Mention description as “In preparation”

6. Click Save.

**Impact of this configuration in Master Data / Transaction**

BOM with status 6 can not be used for any application.
2.2 Define BOM Usage

BACKGROUND

This configuration setting enables to define Bill Of Material (BOM) usage.

BOM usage defines the usage of BOM in specific application area in the SAP.

Example, there can be a separate BOMs for

- Design,
- Production
- Costing.

In this way, each area is dealing only with the specific data it requires.

Example:

- The design BOM includes all the components of the product and their technical data from the design point of view. This BOM is generally not linked to any order.

- The production BOM contains all the items required from the production and assembly point of view. Only items relevant to production, for which production data (such as the issue storage location) can be entered, are required. A production BOM does not contain any packaging materials required in the shipping department.
SCENARIO

Create new BOM usage.

Note:-

Standard BOM usage available with SAP is sufficient. However any new BOM usage can be created.

INSTRUCTIONS

Follow the Menu Path: IMG→Plant Maintenance and customer services→ Master data in plant maintenance and customer service →Bills of materials→ General Data → BOM Usage → Define BOM usages

1. Click

2. Click

3. Enter usage value; it can be either numeric or alphabet. It is suggested to be numeric.
4. Select +, - or . to indicate to which area this BOM is meant for like Production, Engineering, Spare, Plant Maintenance, Sales or for costing relevancy.

E.g. For usage 4, spare parts indicator is maintained as optional (.).

Note:-Based on this, during BOM explosion, entire dependent requirements are also planned,

5. Enter Usage text

6. Click Save

**Impact of this configuration in Master Data / Transaction**

When creating the BOM, key defined here will appear in the BOM Usage field.

According to the requirement, BOM usage key has to be selected during BOM Creation.

Click Match code or F4 in BOM usage field, to select the desired BOM usage.

Transaction code to create BOM is CS01
2.3 Define Default values for item status

BACKGROUND

This configuration setting enables to define default values for item status.

Every item in the BOM can be defined whether it is subjected to

- Costing
- Sales
- Production
- Spare part

This configuration setting is used to indicate whether the BOM component along with the BOM usage.

- is to be considered for costing in this BOM or not,
- is relevant to sales (normally used in Variant configuration),
- is a spare part group
- is related to Production

SCENARIO

Set the default value for items in BOM.

INSTRUCTIONS
**Follow the Menu Path:** IMG→Plant Maintenance and customer services→ Master data in plant maintenance and customer service → Bills of materials → General Data → BOM Usage → Define Default values for item status

1. Click 🌞

![Change View "Copy defaults for BOM usage - item statuses": Overview](image)

2. Click New entries

3. Enter Usage value

4. Update the following fields

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>BOM usage</td>
<td>Field defining the BOM usage</td>
<td>Enter value e.g. 1</td>
</tr>
<tr>
<td>Prod</td>
<td>Indicating that the BOM item is related to Production</td>
<td>Make tick in the check box</td>
</tr>
<tr>
<td>Eng/des</td>
<td>Indicating that the BOM item is related to Engineering and Design</td>
<td>Leave blank.</td>
</tr>
<tr>
<td>Spare</td>
<td>Spare part indicator. Items</td>
<td>Enter A or B</td>
</tr>
</tbody>
</table>
can be grouped under spare parts A group or group B. this will help in identifying spares for replacement by group A or group B

PM  Indicating that the BOM item is related to Plant Maintenance

Leave blank

Sales  Indicating the item is related to Sales and it will appear in the sales order.

Leave blank. Normally used in variant configuration.

Relevant  Relevant to costing

Select X, indicating relevant to costing.

5. Click Save.

**Impact of this configuration in Master Data / Transaction**

Example:-

BOM usage defined 1 indicating relevant to production. The item status as configured such that all items

- are relevant to production

- can be relevant to costing

In this example, the indicators are checked as follows:

- The Indicator: item relevant to production cannot be deselected (required entry). In the BOM maintenance
functions, this indicator is set automatically for all items and cannot be cancelled.

Since the item can be relevant to costing, the default value X (fully relevant to costing) can be set for the Indicator for relevance to costing. This value can be overwritten in the BOM maintenance functions.

BOM item level default setting will appear as per the setting done here.

<table>
<thead>
<tr>
<th>Item Status</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Engineering/design</td>
<td></td>
</tr>
<tr>
<td>Production relevant</td>
<td></td>
</tr>
<tr>
<td>Plant maintenance</td>
<td></td>
</tr>
<tr>
<td>Spare part indicator</td>
<td>A</td>
</tr>
<tr>
<td>Relevant to sales</td>
<td></td>
</tr>
<tr>
<td>CostingRelevancy</td>
<td>X</td>
</tr>
</tbody>
</table>

Note:- when creating BOM the usage 4 is mentioned, which in turn identify this BOM as Plant maintenance BOM. Also indicate item as spare part indicator group A.

This is used while exploding the BOM for spare parts planning.
2.4 Define Field Selection for Work center

**BACKGROUND**

This configuration setting enables to make the field in work center master data as

- Mandatory
- Optional
- Highlight
- Hide

Field selection will be used to make certain field as mandatory entry or to hide certain fields during creation of work center master data.

**SCENARIO**

Make field person responsible for work center category ZPM1 as mandatory field.

**INSTRUCTIONS**

**Follow the Menu Path:** IMG → Plant Maintenance and customer services → Maintenance plans, work centers, Task lists and PRTs → Work Centers → General Data → Define Field Selection

Click ☰
Double click Basic data

Field Selection: Screen Groups

Field Selection: Modifiable Fields

<table>
<thead>
<tr>
<th>Screen group</th>
<th>Basic data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modifiable</td>
<td>Influencing</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Modifiable field</th>
<th>Field name</th>
<th>Input</th>
<th>Req</th>
<th>Disp</th>
<th>Hide</th>
<th>HiLi</th>
</tr>
</thead>
<tbody>
<tr>
<td>Backflush</td>
<td>P3000-RGFKZ</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Efficiency rate</td>
<td>RC68A-ZGRXX</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>P3000-STRAND</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mix. mat. allowed</td>
<td>P3000-MXMAT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Person responsible</td>
<td>P3000-VERAN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GDR system</td>
<td>P3000-SUESYS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rule for maint.</td>
<td>RC68A-VGMXX</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Standard value key</td>
<td>P3000-VGWTS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Standard value maintenance</td>
<td>BLOCK_VGWTS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stor. loc. resource</td>
<td>P3000-LOGRT_RES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supply Area</td>
<td>P3000-PRVBE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transition matrix</td>
<td>P3000-RESGR</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Usage</td>
<td>P3000-PLANV</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Select Req. radio button against

Double click Person responsible

Click Field selection Req. radio button for the required work center category. Contents column indicate the work center category.

Click on Field selection to modify field selection for new work center category.

Click New values ... If the desired work center category is not available. E.g. ZPM1 category is not available.

Click New values ... to add more entry.
Enter content ZPM1 or any work center category.

Click radio button Req.

Click

**Impact of this configuration in Master Data / Transaction**

When work center with category ZPM1 is created, person responsible field become mandatory.
<table>
<thead>
<tr>
<th>Plant</th>
<th>IND6</th>
<th>ABC Ltd</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work center</td>
<td>TEST1</td>
<td>testing</td>
</tr>
</tbody>
</table>

### General data

<table>
<thead>
<tr>
<th>Work center cat.</th>
<th>PM Machine WC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person responsible</td>
<td>✓</td>
</tr>
</tbody>
</table>

| Location          |               |
| QDR system        |               |
| Supply Area       |               |
2.5 Set Parameters

BACKGROUND

This configuration setting enables to define Parameter (activities) for formula.

Parameter is one of the required settings to calculate the conversion cost incurred in the Work center during manufacturing.

Work center while in use can consume

- Power
- Labour
- Setup time
- Depreciation
- Steam etc.

The above costs incurred during conversion will be captured through the activity. Parameter is the structure to capture this activity.

This will be assigned to the standard value key. Standard value key will be assigned in the work center.

SCENARIO

Create a Parameter. Note: - Standard SAP setting is sufficient. Let us discuss the creation of new parameter.
INSTRUCTIONS

Follow the Menu Path: IMG → Plant Maintenance and customer services → Maintenance plans, work centers, Task lists and PRTs → Work Centers → General Data → Set Parameters

Click

Change View "Parameters": Overview

Click New entries
Maintain the Following fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parameter</td>
<td>Parameter to hold the value. Any alphanumeric six digit may be entered. E.g. LABOUR</td>
</tr>
<tr>
<td>Origin</td>
<td>Place where from the value is to be taken. E.g. To indicate value to be taken from task list maintain 2 in this field.</td>
</tr>
<tr>
<td>Short key word</td>
<td>Short description</td>
</tr>
<tr>
<td>Key work</td>
<td>Key word to identify</td>
</tr>
<tr>
<td>Dimension</td>
<td>Dimension of the parameter. E.g. Any thing related to Duration may have TIME as dimension.</td>
</tr>
<tr>
<td>Standard Value Unit</td>
<td>Unit of this parameter. E.g. Time dimension may have unit as MIN.</td>
</tr>
</tbody>
</table>

Note: - If any parameter for which there is no unit, it may be mentioned as no unit.
Impact of this configuration in Master Data / Transaction

Link between the parameter and the master data is as below.

a. This parameter will be assigned to the standard value key.

b. Standard value key will be attached with the work center.

c. Work center will be attached in the task list. I.e. in the routing or in the master recipe.

d. Standard value (i.e. duration of labor hours required) will be maintained in the task list as a master data.
2.6 Define Standard value keys

BACKGROUND

This configuration setting enables to define the standard value key.

Standard value key is very essential to capture the cost incurred in the work center.

Standard value key will contain the activities. One standard value key can contain up to six activities. Each activity refers to the cost.

Example:-

- Production cost
- Set up cost
- Labour cost
- Quality Cost
- Power cost
- Steam cost

One work center can have only one standard value key.

SCENARIO

Create a standard value key to have the activities of setup, machine, labor, steam and water.
INSTRUCTIONS

Follow the Menu Path: IMG→Plant Maintenance and customer services→ Maintenance plans, work centers, Task lists and PRTs → Work Centers → General Data → Define standard value keys

Click  

Click  

Change View "Standard Value Key Information"

Click New entries
Maintain the Following fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard value key</td>
<td>Enter any alpha numeric to indicate standard value key. E.g. STD1</td>
</tr>
<tr>
<td>Description</td>
<td>Maintain standard value key description. E.g. setup/machine/labor/Power</td>
</tr>
<tr>
<td>Parameter</td>
<td>Maintain the parameters. Up to six parameters can be maintained.</td>
</tr>
</tbody>
</table>

Tick this check box to generate formula.
Click Save.

**Impact of this configuration in Master Data / Transaction**

When creating the work center, standard value key STD1 to be mentioned.
2.7 Define Task List usage keys

**BACKGROUND**

This configuration setting enables to define the task list usage to the work center.

Usage of work center to the specific task list (i.e. only in the maintenance task list) can be defined to restrict its usage.

**SCENARIO**

Define the work center usage to the specific task list types.

**INSTRUCTIONS**

**Follow the Menu Path:** IMG→Plant Maintenance and customer services→ Maintenance plans, work centers, Task lists and PRTs→Work Centers→Task list Data→Define task list usage keys.

Click 😊
Select 004 Only maintenance task lists

Double click Task list type

Click New entries
Update the Following fields

**Field**
- Task List type

**Description**
- A for General maintenance task list
- E – Equipment task list
- T – functional location task list

Click Save.

**Impact of this configuration in Master Data / Transaction**

When creating Work center usage is to be mentioned as 004.

Once this is maintained, then it will not be possible to use this Work center in Master Recipe or in Rate routing.
2.8 Maintain Control keys

BACKGROUND

This configuration setting enables to define control key.

Control key governs

- Scheduling of operation
- Cost calculation for an operation
- Capacity calculation for an operation
- Confirmation for an operation

Control key is mapped with the work center in the task list (i.e. in the routing and in the master recipe).

SCENARIO

Create a control key with confirmation as mandatory and it should calculate the cost and capacity, it should also schedule the operation.

INSTRUCTIONS

Follow the Menu Path: IMG→Plant Maintenance and customer services→ Maintenance plans, work centers, Task lists and PRTs →Work Centers → Task list Data → Define control keys.

Click 🎉
### Change View "Control Keys for Operations": Overview

<table>
<thead>
<tr>
<th>Ctrl</th>
<th>Control key description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MPI1</td>
<td></td>
</tr>
<tr>
<td>P001</td>
<td>Shift planning - internal processing</td>
</tr>
<tr>
<td>PH00</td>
<td>PH IDES-MES: Dummy</td>
</tr>
<tr>
<td>PI01</td>
<td>Master recipe/process order</td>
</tr>
<tr>
<td>PI02</td>
<td>Master recipe/process order with QM</td>
</tr>
<tr>
<td>PI03</td>
<td>Recipe/process order, milestone conf.</td>
</tr>
<tr>
<td>PI04</td>
<td>Sched, Cap, AutoGdsRecpt, ConfReqd</td>
</tr>
<tr>
<td>PI05</td>
<td>Sched, Cap, AutoGdsRecpt, Costed, ConfReqd</td>
</tr>
<tr>
<td>PI06</td>
<td>Sched, Cap, Costed, ConfReqd</td>
</tr>
<tr>
<td>PI07</td>
<td>Master recipe/process order w/o conf</td>
</tr>
<tr>
<td>PI08</td>
<td>Sched, Cap, AutoGdsRecpt, Costed, MilestConf</td>
</tr>
<tr>
<td>PI11</td>
<td>Sched, Cap, Costed</td>
</tr>
<tr>
<td>PI12</td>
<td>Sched, Cap, QM, Costed</td>
</tr>
<tr>
<td>PI13</td>
<td>Sched, Cap, QM, Costed, MilestConf</td>
</tr>
<tr>
<td>PI14</td>
<td></td>
</tr>
<tr>
<td>PM01</td>
<td>Plant maintenance - internal</td>
</tr>
<tr>
<td>PM02</td>
<td>Plant maintenance - external</td>
</tr>
<tr>
<td>PM03</td>
<td>Plant maintenance - external (services)</td>
</tr>
<tr>
<td>PM05</td>
<td>Plant maintenance - internal (service)</td>
</tr>
<tr>
<td>PM08</td>
<td></td>
</tr>
<tr>
<td>PP01</td>
<td>In-house production</td>
</tr>
<tr>
<td>PP02</td>
<td>External processing</td>
</tr>
</tbody>
</table>

Click [New entries]
### Maintain the Following fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Control Key</td>
<td>Enter any alphanumeric four digit key. E.g. YPM1</td>
</tr>
<tr>
<td>Description</td>
<td>Maintain description of this control key. E.g. Sched,capacity,Cost, Mustconfirm</td>
</tr>
<tr>
<td>Indicators</td>
<td>Tick the check box as shown above in the screen. Tick in the Check box will perform the respective</td>
</tr>
</tbody>
</table>
function to the operation / phase which is having this control key.

Click **Save**.

Click **Call up long text** to maintain any long text to this control key.

Maintain the long text.

Click **Save**.

Click **Next** if you get the Other language screen.

Click **Save**.
Impact of this configuration in Master Data / Transaction

Link between control key and Transaction:-

Control key is attached in the task list with work center for each operation

While performing order creation, confirmation, MRP run system will behave according to this configuration setting.
2.9 Define Serial Number Profile

BACKGROUND

This configuration setting enables to define the Serial number profile.

Serial number profile must be assigned to material which is to be handled with serial number. It is a plant level assignment. It is possible to assign different profile in different plants.

Serial number profile controls
✓ Assignment of serial numbers
✓ Requirement of serial number to equipment type
✓ System control on stock validation
✓ Serial number proposal with equipment category

SCENARIO

Create Serial number profile for IND6 plant application

INSTRUCTIONS

Follow the Menu Path: IMG→Plant Maintenance and customer services→ Master Data in Plant maintenance and customer service → Technical objects → Serial number management → Define serial number profiles

Click ☝️

Click New Entries

Maintain the following fields

<p>| Field | Description of field and value |</p>
<table>
<thead>
<tr>
<th>Prof.</th>
<th>Key identifying the serial number profile. E.g. IND6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile text</td>
<td>Text for serial number profile. E.g. Equipment Sl.No.IND6</td>
</tr>
<tr>
<td>ExistReq.</td>
<td>Tick in this check box will make serial number mandatory before performing the transaction. If it is not ticked, serial number can be assigned later. E.g. Tick this check box for our example purpose.</td>
</tr>
<tr>
<td>Cat</td>
<td>Equipment category to which the serial number assignment must be proposed. If not specified, serial number from internal number range will be assigned automatically. E.g. Y to pop up the serial number for equipment category with Y.</td>
</tr>
<tr>
<td>StkCk</td>
<td>Stock validation. Leave it blank. Available entries are</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Stock check</th>
<th>Short text</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>No stock validation</td>
</tr>
<tr>
<td>1</td>
<td>Inconsistencies in stock data -&gt; Warning</td>
</tr>
<tr>
<td>2</td>
<td>Inconsistencies in stock data -&gt; Error</td>
</tr>
</tbody>
</table>

Click ✅

Select the above created row

![Table with entries]

Double click  🔄 Serializing procedure 🔄 in the left side of the screen

Click New Entries
## Maintain the following fields

<table>
<thead>
<tr>
<th>Field name</th>
<th>Field description and value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Proc</strong></td>
<td>Serial number assignment procedure. I.e indicating the business transaction at which the serial number is to be assigned. Available entries are:</td>
</tr>
<tr>
<td><strong>SerUsage</strong></td>
<td>Indicating the assignment of serial number as mandatory, optional. Available entries are:</td>
</tr>
<tr>
<td><strong>EqR</strong></td>
<td>Assignment of serial number to equipment master record.</td>
</tr>
</tbody>
</table>

### Proc

<table>
<thead>
<tr>
<th>Proc</th>
<th>ProcDesc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>HUSL</td>
<td>Maintain handling unit</td>
</tr>
<tr>
<td>MMSL</td>
<td>Maintain goods receipt and issue doc.</td>
</tr>
<tr>
<td>PPAU</td>
<td>Serial numbers in PP order</td>
</tr>
<tr>
<td>PPRL</td>
<td>PP order release</td>
</tr>
<tr>
<td>PPSSF</td>
<td>Serial nos in repetitive manufacturing</td>
</tr>
<tr>
<td>QMSL</td>
<td>Maintain inspection lot</td>
</tr>
<tr>
<td>SDAU</td>
<td>Serial numbers in SD order</td>
</tr>
<tr>
<td>SDCC</td>
<td>Completeness check for delivery</td>
</tr>
<tr>
<td>SDCR</td>
<td>Completion check for delivery</td>
</tr>
<tr>
<td>SDLN</td>
<td>Maintain delivery</td>
</tr>
<tr>
<td>SDRE</td>
<td>Maintain returns delivery</td>
</tr>
</tbody>
</table>

Select QMSL – to maintain the serial number when performing inspection for equipment.

### SerUsage

<table>
<thead>
<tr>
<th>Serial number usage</th>
<th>Short text</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>None</td>
</tr>
<tr>
<td>02</td>
<td>Optional</td>
</tr>
<tr>
<td>03</td>
<td>Obligatory</td>
</tr>
<tr>
<td>04</td>
<td>Automatic</td>
</tr>
</tbody>
</table>

Let us select Optional.

### EqR

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Short text</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Proposal w/o equipment</td>
</tr>
<tr>
<td>02</td>
<td>always with equipment</td>
</tr>
</tbody>
</table>

01 – Serial number can be assigned later
02 – Serial must be assigned at the time of equipment creation.
Note: - This setting can NOT be changed later.

Impact of this configuration in Master Data / Transaction

Serial number profile defined here can be maintained in the material master storage 2 view.
Also when making GR, serial number has to be assigned.
2.10 Define Serialization Attributes for Movement types

BACKGROUND

This configuration setting enables to define the Serial number attributes for movement type wise.

It is possible to define a different procedure to different movement types. By this, serial number assignment during goods movement can be controlled per movement type wise.

SCENARIO

Discuss serialization attributes for movement types

INSTRUCTIONS

Follow the Menu Path: IMGÆPlant Maintenance and customer servicesÆMaster Data in Plant maintenance and customer service Æ Technical objects Æ Serial number management Æ Define serialization Attributes for movement types

Click 📐
Double click **Define flow type groups**

Click **New Entries**

Maintain the following fields

<table>
<thead>
<tr>
<th>Field name</th>
<th>Field description and value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prof.</td>
<td>Key identifying the profile already created. E.g. IND6</td>
</tr>
<tr>
<td>Proc</td>
<td>Procedure to be applicable. E.g. MMSL</td>
</tr>
<tr>
<td>SNo-MovmntTyp.</td>
<td>Movement type group for serial number profile. Four digit key linking Profile, procedure and other control.</td>
</tr>
<tr>
<td>SerUsage</td>
<td>Indicating the assignment of serial number as mandatory, optional. Available entries are</td>
</tr>
<tr>
<td></td>
<td>Let us select Optional.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Serial number usage</th>
<th>Short text</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>None</td>
</tr>
<tr>
<td>02</td>
<td>Optional</td>
</tr>
<tr>
<td>03</td>
<td>Obligatory</td>
</tr>
<tr>
<td>04</td>
<td>Automatic</td>
</tr>
</tbody>
</table>

Assignment of serial number
<table>
<thead>
<tr>
<th>Equi...</th>
<th>Short text</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Proposal w/o equipmt</td>
</tr>
<tr>
<td>02</td>
<td>always with equipmt</td>
</tr>
</tbody>
</table>

01 – Serial number can be assigned later  
02 – Serial must be assigned at the time of equipment creation.  
Note: - This setting can NOT be changed later.

Click ![click_icon]

Click ![click_icon]

Double click ![double_click_icon]

Assign the key mentioned under SNo-MovmntType in the previous setting. E.g. key 561 maintained in the previous setting.

By this that procedure and serial number creation control will be more specific to movement type.
If for a specific movement type, if the serial number is to be optional it can be done through this settings.

**Impact of this configuration in Master Data / Transaction**

Serial number requirement for each movement type will be required according to the settings maintained here.
3. Maintenance Plan and Notification

3.1 Define Maintenance planner group

**BACKGROUND**

This configuration setting enables to define maintenance planner group.

Maintenance planning group can be a person or a department. It can be assigned to technical objects.

**SCENARIO**

Define planner group for IND6

**INSTRUCTIONS**

*Follow the Menu Path:* IMG ➔ Plant Maintenance and customer services ➔ Maintenance plans, Work centers, Task Lists and PRTs ➔ Basic Settings ➔ Define maintenance planner group

Click 🔄

Click [New Entries]

Maintain the following fields

<table>
<thead>
<tr>
<th>Field name</th>
<th>Field description and value</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI PI</td>
<td>Key identifying the planning plant. E.g. IND6</td>
</tr>
<tr>
<td>PG</td>
<td>Key identifying the planner group. E.g. IN6</td>
</tr>
<tr>
<td>Name</td>
<td>Person or department name.</td>
</tr>
<tr>
<td>Telephone</td>
<td>e.g. David to indicate name.</td>
</tr>
<tr>
<td>-----------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td></td>
<td>Contact number can be entered if required for info purpose.</td>
</tr>
</tbody>
</table>

Click Save.

**Impact of this configuration in Master Data / Transaction**

Maintenance planner will be used in the transaction.
3.2 Set Maintenance Plan category

BACKGROUND

This configuration setting enables to define Maintenance Plan category.

Maintenance plan category defines which call object to be generated for a maintenance plan when maintenance call is due.

I.e. with reference to the maintenance plan, system can trigger the following call objects.

- Maintenance order
- Service order
- Maintenance order with maintenance notification
- Service order with service notification
- Maintenance order with WCM objects
- Maintenance notification
- Service notification
- Service entry sheet
- Inspection lot

Maintenance plan category defined can be assigned as a default to users using parameter id WAT.

SCENARIO

Define maintenance plan category.

INSTRUCTIONS
**Follow the Menu Path:** IMG → Plant Maintenance and customer services → Maintenance plans, Work centers, Task Lists and PRTs → Maintenance Plans → Set Maintenance Plan categories

Click 🍀

Click New Entries

<table>
<thead>
<tr>
<th>Field name</th>
<th>Field description and value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maint. plan cat</td>
<td>Key identifying the maintenance plan category. E.g. I6</td>
</tr>
<tr>
<td>Name</td>
<td>Text defining the maintenance plan category. E.g. IND6 PM order call</td>
</tr>
<tr>
<td>Call object</td>
<td>Select from the available entry. Available entries are Maintenance or service order</td>
</tr>
<tr>
<td></td>
<td>E.g. Select Maintenance or service order.</td>
</tr>
<tr>
<td>Change d…</td>
<td>Tick in this check box will create change document. E.g. Tick the check box.</td>
</tr>
<tr>
<td>Confirmat…</td>
<td>Confirmation for completing the call object. It can control scheduling of maintenance plan after completion. E.g. Tick this check box.</td>
</tr>
<tr>
<td>Outl. agree.</td>
<td>Tick in this check box will enable to create maintenance plan with reference to outline agreement.</td>
</tr>
<tr>
<td>Ref. object</td>
<td>Order category in which the reference object to be used. Select from available entries.</td>
</tr>
</tbody>
</table>
Repeat the above steps to create further maintenance plan categories.

Click ![image](image)

**Impact of this configuration in Master Data / Transaction**

Maintenance plan categories defined here is used in maintenance plan.
3.3 Define Number Ranges for maintenance Plans

**BACKGROUND**

This configuration setting enables to define number range for maintenance plan.

Number range to the maintenance plan is assigned through the maintenance plan category.

Note: - Number ranges are assigned directly in the production system normally.

**SCENARIO**

Define number range for maintenance plan category I6.

**INSTRUCTIONS**

**Follow the Menu Path:** IMG → Plant Maintenance and customer services → Maintenance plans, Work centers, Task Lists and PRTs → Maintenance Plans → Define number ranges for maintenance plans

Click 🎁
Click on Groups

**Maintenance plan number**

**Maintain Number Range Groups**

Number range object Maintenance plan Grouping............

- Maintenance plan no.
  - ME
  - PM
  - PN
  - QM
  - SA
  - SM
  - TP

- Group without text
  - MM

- Testing Schedules for Stability Studies
  - ST

- Second interval as example

Not assigned
- I6

Note I6 is not assigned with any number range.
To create additional group (additional number range) from the top follow the menu path as shown below.

Enter the required text, from number and To number.

Click
Maintain Number Range Groups

<table>
<thead>
<tr>
<th>Number range object</th>
<th>Maintenance plan</th>
<th>Grouping</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Maintenance plan no.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ME PM PN QM SA SM TP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Group without text</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Testing Schedules for Stability Studies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ST</td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ Second interval as example</td>
<td></td>
<td></td>
</tr>
<tr>
<td>□ PM Plan PM ORder range</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Not assigned

I5

Click on I6

Click

Tick the required group check box. E.g.

Click
Impact of this configuration in Master Data / Transaction

Number range defined here will be used when performing the relevant transaction
3.4 Maintenance and Service Notification Type

BACKGROUND

This configuration setting enables to define notification type.

Notification is the process of informing and recording any deviation from the specification. SAP defined standard notification types are

✓ Customer complaint
✓ Vendor complaint
✓ Internal problem notification

Apart from the above types, any other type of notification can be created according to the business requirements.

SCENARIO

Define Notification type for Breakdown maintenance type I6.

INSTRUCTIONS

Follow the Menu Path: IMG→Plant Maintenance and customer services→ Maintenance and Service Processing → Maintenance and Service Notifications → Notification creation → Notification Types → Define Notification Types

Click 🎉
To create new notification type, it is suggested to copy from the standard Notification type.

Select Notification type M1 by pressing the grey box in the left.

Click
**Change View "Notification Types": Details of Selected Set**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Field description and value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notification type</td>
<td>Key identifying the notification type</td>
</tr>
<tr>
<td>Notification origin</td>
<td>Origin of notification. Select from available entries.</td>
</tr>
<tr>
<td>Reference time</td>
<td>Date and time to propose when completing notification. E.g. C to indicate malfunctioning end.</td>
</tr>
<tr>
<td>Catalog profile</td>
<td>It is used to define object or subject when creating maintenance notification. Select from available entries. Catalog profile is the collection</td>
</tr>
</tbody>
</table>
of codes and code group. We will discuss about it later.

<table>
<thead>
<tr>
<th>Update group (stats)</th>
<th>LIS structure update control Leave it as it is with SAP standard settings.</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ Early no. alloc.</td>
<td>Tick in this check box will assign the notification number immediately on start of transaction rather than assigning number at the time of saving.</td>
</tr>
<tr>
<td>01 Number range</td>
<td>Number range copied from the source as 01</td>
</tr>
</tbody>
</table>

Click ☑

Click ☑

**Impact of this configuration in Master Data / Transaction**

New notification type with I6 can be created.
4. PM Order

4.1 Configure order type

BACKGROUND

This configuration setting enables to define order type.

An order type holds control of various parameters which we are going to discuss one by one. Different order types are defined to indicate the different maintenance process.

E.g. one order type for Preventive maintenance, another order type for breakdown maintenance etc.

SCENARIO

Define order type IBD6 for Breakdown maintenance.

INSTRUCTIONS

Follow the Menu Path: IMG → Plant Maintenance and customer services → Maintenance and Service processing → Maintenance and Service Orders → Functions and settings for Order types → Configure Order Types

Click ☑️
Note: - When creating new order types it is recommended to copy from existing one.

Let us copy from PM01 to create IBD6

Select the row to copy from. E.g. PM01
Click [Image]

Change the order type and description as shown below

Maintain the following fields

<table>
<thead>
<tr>
<th>Field name</th>
<th>Field description and value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Type</td>
<td>Key identifying the order type. E.g. IBD6. Also enter the description in the next window. E.g. Maintenance Order for Breakdown</td>
</tr>
<tr>
<td>Cost accounting parameters</td>
<td>Costing related setting. Leave it as it is.</td>
</tr>
<tr>
<td>Settlement profile</td>
<td>Costing related setting defining settlement profiles and budget profile. Settlement profile will be copied to settlement rule.</td>
</tr>
<tr>
<td>Budget Profile</td>
<td></td>
</tr>
<tr>
<td>Object Class</td>
<td></td>
</tr>
<tr>
<td>Release immediately</td>
<td>Discuss with CO member and maintain this.</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------</td>
</tr>
<tr>
<td>Tick in this check box will release maintenance order immediately. Note:- If maintenance order is created through maintenance call i.e notification, then order will be automatically.</td>
<td></td>
</tr>
</tbody>
</table>

Click

<table>
<thead>
<tr>
<th>Order category</th>
<th>30</th>
<th>Maintenance order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Type</td>
<td>IB06</td>
<td>Maintenance Order for Breakdown</td>
</tr>
</tbody>
</table>

Cost accounting parameters
- CO Partner Update: Semi-active
- Open item management: Components active
- Revenue postings: not allowed

Cost accounting profiles
- Settlement profile: 40 Maintenance Order
- Budget Profile: 000001 Budget Profile
- Object Class: 1

Reorganization
- Residence Time1
- Residence Time2

Release immediately

Screen RefObject
Click

**Impact of this configuration in Master Data / Transaction**

Order type defined here can be used when creating maintenance order for breakdown.
4.2 Assign order types to Maintenance plants

**BACKGROUND**

This configuration setting enables to assign the order type to maintenance plant.

We can define any number of order type, but each order must be assigned to maintenance plant where the physical maintenance task is carried out.

Maintenance order will be created only in maintenance plant.

**SCENARIO**

Assign order type IBD6 to maintenance plant IND6.

**INSTRUCTIONS**

**Follow the Menu Path:** IMG ➔ Plant Maintenance and customer services ➔ Maintenance and Service processing ➔ Maintenance and Service Orders ➔ Functions and settings for Order types ➔ Configure Number ranges

Click 🤓

Click [New Entries]

Maintain the entries as shown below
Impact of this configuration in Master Data / Transaction

Order type is assigned to maintenance plant.
5. Equipment Calibration

5.1 Maintain settings at plant level

BACKGROUND

This configuration setting enables to define the settings at plant level.

When QM module is to be implemented, plant level settings are needed to be maintained. Following setting at plant level can be managed through this setting.

- Version control for Master Inspection characteristics and Inspection method,
- Plant level sampling procedure
- Code and selected set at plant level for valuation
- Automatic usage decision waiting time

SCENARIO

Maintain Plant parameter of QM setting for plant IND6. It is required to maintain Plant level UD code and waiting time for automatic UD.

INSTRUCTIONS

Follow the Menu Path: IMG → Quality Management → Basic settings → Maintain settings at plant level.
Click and type IND6
Select plant IND6 by clicking grey box in the left side.

Click ⬅️

**Note:- Default settings are sufficient to do with QM module. However important settings along with the screen shots are explained below.**

**Update the Following fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️ Master insp. characs with history</td>
<td>Tick in this check box will assign version to the Master Inspection Characteristics automatically during creation and change.</td>
</tr>
<tr>
<td>✔️ Inspection methods with history</td>
<td>Tick in this check box will</td>
</tr>
</tbody>
</table>
assign version to the Inspection method automatically during creation and change.

Click Insp. lot creation

**Insp. Lot creation Tab screen**

Change View """"Plant-Dependent QM Settings"""": Details

No settings are to be done here.

Click Results recording

**Result recording Tab screen**
- “Automatic close” When performing the result recording, automatically characteristics will be evaluated and closed.

Proposal for inspection point valuation:-

To valuate the inspection point, selected set, code and code group can be maintained at plant level.

This will be referred incase of any missing data in the master data.

No other settings are to be done here.
**InsLot completion Tab screen**

**Change View ""Plant-Dependent QM Settings"": Details**

- **Plant**: 1ND0 ABC Ltd

**Automatic usage decision**
- **Delay time for skip lot**: 
- **Waiting time (hrs)**: 
- **Waiting time (mins)**: 

**Batch valuation**
- **Batch valuation without material spec.**

**Automatic Usage decision:-**

To configure Automatic Usage decision waiting time should be mentioned.

Automatic UD will be performed after this time is elapsed from the result recording.

Note: - Auto UD program has to be run to make auto UD.

Batch Valuation check box to be ticked, if batch updating is to be done without material specification. E.g. Leave it blank.

Click **General settings**
General settings Tab screen

No settings are to be done here.

Click Save.

Impact of this configuration in Master Data / Transaction

Over all maintenance of the above will control,

- Automatic creation of versions for MIC during creation and change

- Selected set at plant level may be used during result recording

- Automatic usage time elapse duration may be mentioned here
5.2 Assign Inspection type to order types

BACKGROUND

This configuration setting enables to define the inspection type to maintenance or service order type.

For calibration of equipment, it is required to record the results for that equipment. To perform any inspection, inspection lot with appropriate inspection type is a must.

With this configuration setting inspection type 14 is assigned to required maintenance order type.

SCENARIO

Define the inspection type 14 to order type.

INSTRUCTION

Follow the Menu Path: IMG→Plant Maintenance and customer services→ Maintenance and Service processing → Maintenance and Service Orders → Functions and settings for Order types → Assign inspection type to maintenance/Service order types

Click 🌱
Inspection type 14 (for calibration of equipment) is assigned to order type PM05.

While creating maintenance order from object call (notification), inspection lot with type 14 will be created.

That’s it then... As it told you earlier the entire PM configuration pack comes in 7 voluminous content based power packed CDS and each sub module in SAP PM is broken into Configuration, End user and Power point and there are tons of bonuses coming with this pack along with all other Integration documents, PM Interview questions and answers and a boatload of step by step guides......... You can take advantage of the special offer by visiting the site at

All our packs are shipped thru FedEx and reaches you in three days time. One more thing this configuration pack is compatible with version 4.7, version 5.0 and 6.0 So you really do have to worry about the version at all.. We have taken care of that... Also all future version changes which will come up will be provided as free updates to you. So you can sit back relax and play the music....

What I want from you now is to do yourself a favour by bringing the brains and wisdom of 10+yrs of SAP PM Experts to your drawing room today. Do it right now my dear friend and take your SAP career to the next level.... You will love it I promise you....